DOVICO Timesheet™ v9

USER'S GUIDE

DOVICO™
SOFTWARE
Get Time on Your Side

DOVICO Software

DOVICO is a company engaged in the business of developing, manufacturing and marketing high technology products dealing with the management of time.

Mission Statement

To continue to be the market leader in productivity and time management software. We will continue to produce high quality software to help our clients reach their business goals. Our innovative and intrapreneurial nature allows us to create applications that exceed end user expectations.

Warranty

TRADE MARKS AND REGISTRATIONS

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Welcome to DOVICO Timesheet

DOVICO Timesheet is a proven 100% web-based project time and cost savings solution. This software improves overall business efficiency and gives you complete control of project budget vs. actual information with real-time reporting.

This new product from DOVICO Software incorporates the best from our proven products along with new features and functions to meet today's client and technology demands.

Whether you are managing projects or not, you'll find DOVICO Timesheet is the ideal solution. Whether your need is to improve control over projects and resources with the goal of increasing profitability while still delivering your projects on time and on budget, or if your need is to gather time and expenses more efficiently, you'll find that DOVICO Timesheet is a solution that will suit your complexity and requirements:

- Time tracking and costing for project management
- Time and expense entry for billing
- Time management metrics
- Time and attendance

Through better time tracking and project costing, this very powerful solution delivers results straight to the bottom line!

For those familiar with Track-IT Suite, see page 18 to review the differences.

Highlights

- Prepares cost estimates by client, project, task, team, employee, and more.
- Enables individual employees to keep track of their time in a variety of ways (while work is being done, at the end of the day, week, month, etc. using start and end times or bulk time).
- Enables employees to record and monitor their own time and expenses relating to their assigned projects and related tasks.
- Provides access to a variety of reports and graphs for any selected period: Timesheet information, billable and non-billable information, client, project and task costs compared with estimated costs, etc.
- Security can be assigned to administrative functions, time entry functions or any combination.
- With DOVICO Timesheet's custom terminology, the application can be customized to conform to an organization's existing terminology. Company definable custom fields, implemented throughout the application, provide the unique ability for organizations to record additional information specific to their organization.

Key Features

- 100% Web-Based interface
- Easy to use time and expense entry (free On Demand Training)
- Over 135 reports (Letter and A4)
- Offline time entry
- Automated reporting, notifications, job tasking
- Custom reports & graphs supported
- Supports billable, non-billable, overtime, flextime
- Unlimited clients, projects, tasks, addresses, notes.
- International date, time, currencies

- Customizable terminology and user interfaces
- Unlimited user-definable custom fields
- Active Directory and itemized security permissions
- Full audit trail
- Includes Microsoft® MSDE database (May use your existing SQL Server)
- Automated maintenance (Backup, re-index etc.)
- ODBC-OLEDB-ADO compliant
- Itemized security permissions
- XML, Web services architecture
- Full Export / Import capability
- Included integration:
  - Microsoft® Project (Microsoft® certified)
  - Microsoft® Project Server (Microsoft® certified)
  - Intuit QuickBooks®
- Alternate integration with Microsoft® Excel and Microsoft® Access

Immediate Benefits

- Reduce, Monitor, and Improve Time and Costs
- Accurately Manage Timesheets and Projects
- Create Precise Future Budgetary Projections
- Increase Project Profits
- Reduce Project Overruns
- Reduce Billing Cycles
- Deliver Your Projects On Time & On Budget

What's New in version 9

Version 9 of DOVICO Timesheet includes many new powerful and useful features to help make the application a more effective and efficient business tool. With both 'ease of use' and 'listening to clients' as significant contributing factors in our design and decision efforts, we are confident that these additions and changes - brought to our attention by you and others - will contribute to your corporate success.

New in DOVICO Timesheet (going from version 8 to 9)

E-mail Notifications for time / expense approvals
E-mail notifications have been greatly enhanced in version 9. Now e-mails can be automatically sent to managers when they have time/expenses to approve, to employees when they have had time/expenses rejected and to managers when employees have not completed their timesheets. These new notifications, along with the ability to edit the text in the e-mail's subject line and body, significantly assist in getting time and expenses submitted, reviewed and approved in a timely manner. See page 101 for details.

Mileage
You can now enter expenses for miles, kilometers, per diem or number of photo copies. Any 'rate based' expense can now be entered by simply selecting the appropriate expense category and entering the total number of units. The resulting expense total is automatically calculated based on the 'cost per unit' established by management. See page 134 for details.

Project Alert Notifications

A new and important type of notification has been added to the Job Scheduler: Project Alerts.
Using Project Alerts allows managers, executives and empowered employees to receive notices via e-mail when established targets for time or costs have been reached. See page 109 for details.

Some of the available triggers:

- Project has reached a certain percentage of budgeted time (or costs)
- Project is over budget by a certain number of hours (or costs)
- Project has exceeded a set number of hours (or costs)
- Project's actual time + ETC are over budget
- Project Billable time has reached a set number of hours

Forewarned is forearmed. Being automatically notified whenever a project's critical success factors are being threatened (on time, on budget, within costs) is a key part in making timely decisions. With project alert notices being sent by e-mail, there is no need to have DOVICO Timesheet continuously open, nor is there the need to periodically scan individual project details to determine what, if anything, is at risk.

Time Entry

We've listened. The column headers that indicate the days of the week in the Time Entry grid are now fixed in place.

Bulk Time Move

Time entry users make mistakes. They enter time against the wrong project or against the wrong task and you only find out about it after weeks of data entry. The new Bulk Time Move utility gives system administrators the power to resolve many of these types of errors by moving an employee's time entries from project to project, task to task or in combination. In certain scenarios it can even be used to merge projects. See page 162 for details.

Security on Costs

Restrictions on what information users can and cannot see has been further enhanced with the ability to hide cost and rate information in Administrative views and in Reports. This is notably effective when you wish to e-mail/distribute a report and keep costing information out of the final output. This new feature is also important when you want to grant some employees access to the Administrative views (to create tasks, assignments, etc) while still keeping rates and costs confidential. See page 167 for details.

Active Directory and Microsoft Project

Employee credentials can now be shared between Active Directory, DOVICO Timesheet and Microsoft Project.

Technology updates

Version 9 of DOVICO Timesheet now uses, and is compatible with, the latest technologies from Microsoft. These include compatibility with Microsoft Vista, .Net 2.0, SQL 2005 and SQL Express.

New Look Reports

We thought we would help the environment a little by reducing the amount of toner used to print our reports.

Upgrading from Track-IT Suite? See page 18.

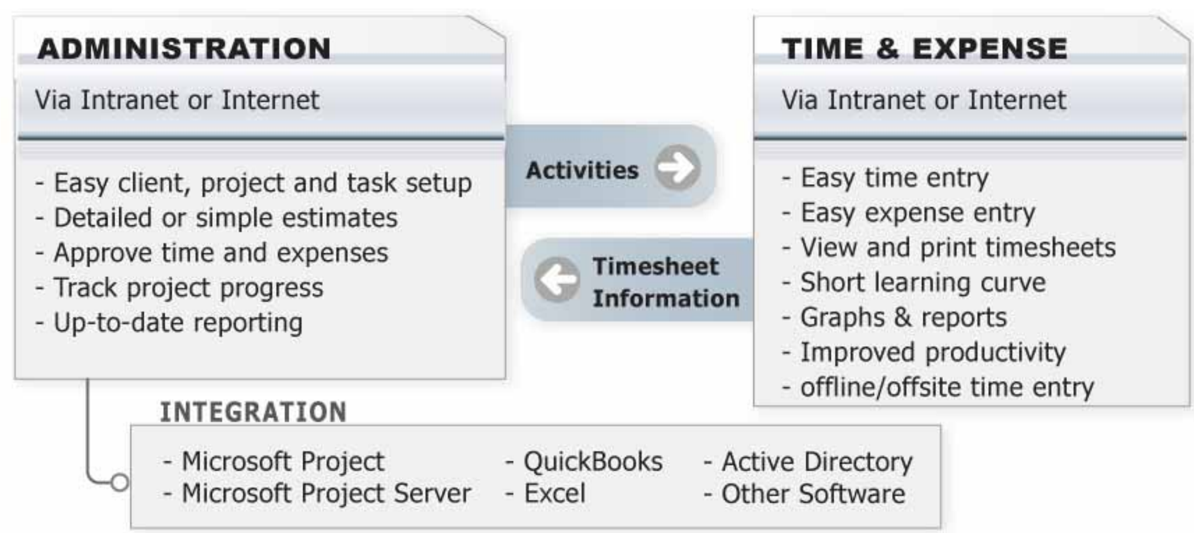
DOVICO Timesheet Overview

Managers and empowered employees use DOVICO Timesheet to setup, manage and monitor activities within projects. Basic information (clients, projects, tasks, employees, etc.) is first entered into the database. Then all employees use DOVICO Timesheet to enter time against the specific projects and tasks assigned to them either while working (timer) or at the end of the day (bulk entry).

In a typical multi-user installation, **everyone** enters time on a daily basis using the time entry screen while **managers** and empowered employees use the administrative functions on a daily, weekly or monthly basis to monitor and report on projects (by employee, team, client, project, task, etc.).

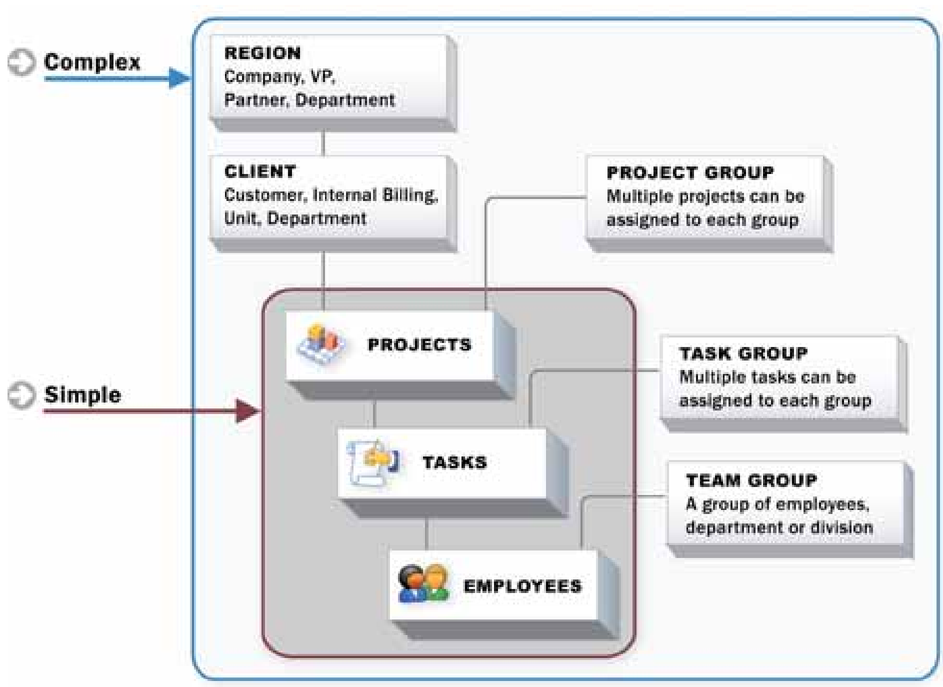
DOVICO Timesheet also synchronizes with Microsoft® Project and Microsoft® Project Server to transmit time and other relevant information to Microsoft® Project.

DOVICO Timesheet can also connect to QuickBooks®. This permits employee timesheet information to be synchronized with QuickBooks® for accurate billing purposes.



DOVICO Timesheet Structure

DOVICO Timesheet has the following default levels of information. You can however add sub-levels. Employees report time against tasks, and recorded hours are rolled-up to each level of information (task group, project, project group and client).



Installation

Before getting to work, you need to install DOVICO Timesheet on your server or centralized computer acting as a file server. Review the **Detailed Installation Guide:** http://www.dovico.com/client.html for detailed instructions on the numerous ways DOVICO Timesheet can be installed.

Note: DOVICO Software offers DOVICO Timesheet as a **hosted** solution (online, ASP) for those wanting to outsource the technical aspects of installing and maintaining the application.

System Requirements

Operating systems

Compatible with Microsoft Windows operating system versions 2000, 2003, XP and most Vista editions. Windows XP Home Edition, Vista Start and Vista Home Basic cannot be used due to limitations with IIS (Internet Information Services).

Minimum Server Requirements

- Windows 2000
- Pentium III 750 MHz
- IIS 5.0 or higher (Internet Information Services)
- .NET 2.0 (included with DOVICO Timesheet)
- SQL Express (included with DOVICO Timesheet)
- 256 MB RAM
- 300 MB free hard drive space on the targeted partition (the destination where DOVICO Timesheet will be installed)
- 150 MB free hard drive space on the operating system's partition
- Network connectivity (TCP/IP)
- File and Printer Sharing for Microsoft Networks

Optimal Server Requirements

- Windows 2003 SP2 with Internet Information Services
- Pentium 4 or greater
- .NET 2.0 (included with DOVICO Timesheet)
- SQL Server 2005
- 1 GB RAM
- 300 MB free hard drive space on the targeted partition (the destination where DOVICO Timesheet will be installed)
- 150 MB free hard drive space on the operating system's partition
- Network connectivity (TCP/IP)
- File and Printer Sharing for Microsoft Networks

Workstation (End-User) requirements (optimized for Internet Explorer)

- Any computer using an HTML web browser (Internet Explorer 6.0 or greater or Firefox 1.0 or greater)
    - A web browser supporting ActiveX controls (when using the Microsoft Project Link)
    - JavaScript and cookies enabled
    - Popup blockers disabled or have the site where DOVICO Timesheet is installed designated as safe in the popup blocker's settings
- Network/Internet connectivity
- Adobe Reader version 5.1 or above
- For Offline Timesheet functionality: If a user's My Documents folder is located on a remote server, that user's computer must be configured to use "offline files"

Using the Help system

DOVICO Timesheet includes a comprehensive help system. The help system is launched when the **Help** button is clicked on any toolbar. When clicked, the help file associated with the current view is displayed (context help).

There are 3 ways to locate information from the help system:

- Click the **Contents** tab to see a high level outline of the contents and to browse to a specific topic or subject matter.
- Click the **Index** tab to see an alphabetical listing of keywords or phrases. Click on the keyword to see that topic.
- Click the **Search** tab to query the entire help system for a particular term. For example, users can search for "ETC" and every topic that contains "ETC" will be listed at the Search tab. Click any topic from the list to see that topic.

Additional information is available from:

Client Section: http://www.dovico.com/client.html

Knowledge Base: http://www.dovico.com/techtips.html

Developer information: http://www.dovico.com/developer.html

Free Additional Reports: http://www.dovico.com/reports.html

Use our **Web Resources** for quick access to support and other helpful information.

DOVICO Corporate Web Site: http://www.dovico.com

Support Online: http://www.dovico.com/support.html

E-mail Support: support@dovico.com

On Demand Training

Quickly learn how to enter time and expenses using DOVICO Timesheet by using our free On Demand training accessible from our Clients page at: http://www.dovico.com/client.html. Or click the **Interactive Training** button from the logon screen.

Knowledge base

Review up-to-date information on common problems and solutions on our web site at http://www.dovico.com/techtips.html.

Date, Time and Currency formats

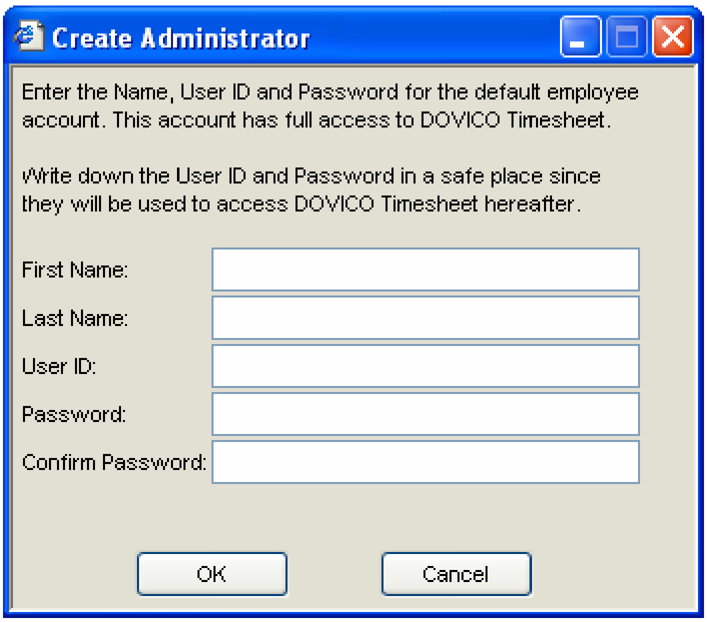
The **date** and **currency** formats used throughout DOVICO Timesheet are based on the regional settings on the server or computer where DOVICO Timesheet is installed.

The Start/End **time** format used for time entry is the 24 hour clock format (e.g. 13:30) and cannot be modified. Users manually entering or adjusting start/end times in the time entry details area of the time entry view must use this format.

The Duration **time** format used for time entry can be either hh:mm or decimal formats (3:30 or 3.5), but values are converted to decimal (3.5) when saved.

Creating an Administrator Account

When DOVICO Timesheet is started for the first time, the software will prompt you to enter information to create an Administrator account. The Administrator account has full access to all functions and features. Additional users (employees) are created from within the application. The Administrator User ID and Password created in this step should be recorded and stored in a safe place.



Enter the necessary information and click **OK**. NOTE: If using the demo database (TSDemoDataV9) and the window above does not appear, please use the following to login: **User ID: rb, Password: rb**

Login

DOVICO Timesheet requires a User ID and Password to logon. You will need to obtain these from your Timesheet administrator.

To login to DOVICO Timesheet:

1. Start your web browser and enter the web address where the application is installed. (e.g. www.yourserver/DovTimesheet/login.aspx)
2. Select the database you wish to open from the **Database** drop-down list.
3. Enter the **User ID**.
4. Enter the **Password** (case sensitive).
5. Click **Login**.

Tips:

- Click the **Enhancement Suggestions** button to send us a product enhancement idea.
- Click the **Interactive Training** button to access DOVICO Timesheet's free On Demand Training.

Licenses

See page 10 for instructions on registering the software.

One license is required for each employee actively using DOVICO Timesheet.

Employees no longer using DOVICO Timesheet can remain in the database without using a license. When freeing up an inactive employee's license, his/her previous time and expense entries remain available for reporting purposes.

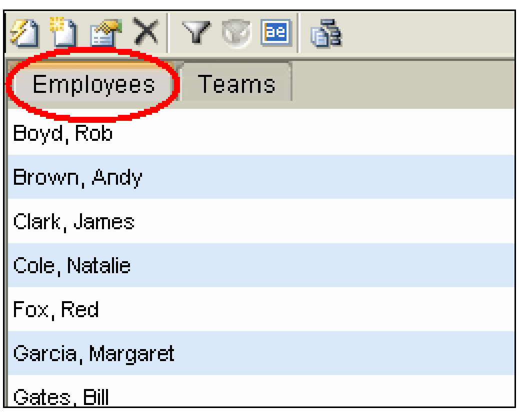
To find out how many licenses are currently used:

1. Select the **About** DOVICO Timesheet button on the toolbar and note the number of registered licenses and the number of licenses being used. Click **OK** when done.

To free a license:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.

   Verify that the **Employees tab** is selected in the employee list pane.



2. Select the **employee** who is no longer using the software.
3. Click the **Properties** button in the employee pane toolbar to open the properties window.
4. In the properties window, change the **Software access** field to **[None]**.
5. Click **Done**.

To transfer a license from one employee to another:

1. From the Project Assignments tab, select the **Employee** from the list who is no longer using the software.
2. Click the **Properties** button in the employee pane toolbar to open the properties window.
3. Change the **Software access** field to **[None]**.
4. Click **Done**.
5. Select the new employee from the list who will now be using the software.
6. Click the **Properties** button.
7. Select the appropriate **Software access** option (Time & Expense Entry tools or All).
8. Click **Done**.

Registering DOVICO Timesheet

When you purchase DOVICO Timesheet, a registration key is sent to you by e-mail. The registration key provided unlocks the software according to the number of licenses purchased.

To view the current number of registered users, click the **About** button on the toolbar.

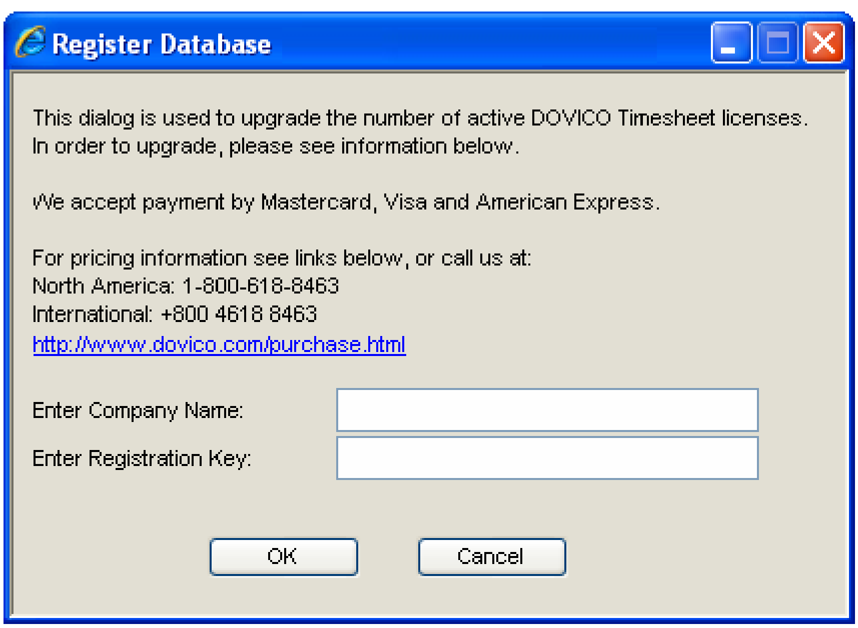
You can transfer a license from one employee to another employee, or you can purchase additional licenses by visiting our web site at http://www.dovico.com/purchase.html.

North American toll free number: 1-800-618-8463
UK toll free: +0800 019 3866
International toll free number: 800-4618-8463

To register DOVICO Timesheet

1. Start DOVICO Timesheet.
2. Click the **About** button located on any toolbar.
3. Click the **Register Product** link. A registration window will appear.
4. Enter the **Company Name** exactly as indicated in the registration key e-mail.
5. Enter the **Registration Key** exactly as indicated in the registration key e-mail.
6. Click **OK**.

Note: If you are operating multiple DOVICO Timesheet databases, each database will have to be registered.



Side Navigation Bar

DOVICO Timesheet offers one-step access to all administrative views and tools through buttons on the side navigation bar. The navigation bar appears on the side of each view. Click the button once to go to that view.

Reports Explorer

Reports Explorer: Use the Reports Explorer (page 75) to view reports by team, employee, client, project, or task for periods of your choice. Many different types of reports can be used to monitor time, expense and project information. For a complete list of reports currently available in DOVICO Timesheet, search the help file’s Index tab for ‘Available Reports’.

Timesheet

Time and Expense Entry: Used by all employees to easily enter and submit time and expenses (page 230).

Time & Expenses section

Time Calendar: To review, edit, add or reject timesheet entries submitted by employees. You can also use this view to check overtime worked. When you go to this view, a month-at-a-glance view is initially displayed. Double click any day to view or edit timesheet entries for that day (page 71).

Time & Expense Approval: Use this view to quickly and easily approve or reject timesheets and expenses submitted by employees (page 68).

Actual Time & Costs: To view or edit project actual cost information. When timesheet entries have been approved, the actual costs are updated to reflect the hours worked (page 90).

Actual Expenses: To view, add, reject or edit actual expense information. Employees, using the expense entry screen, can also submit project expenses, and once approved they are displayed in this view (page 132).

Projects section

Project Workspace: The Project Workspace area includes all necessary views to create project assignments, project budgets/estimates, etc. From this Project Workspace area, you create or edit the employees, tasks, projects, clients, task groups and teams required to setup, manage and monitor project activities (page 48).

Quick Assign: Use the Quick Assign view to make multiple assignments for many employees quickly and effortlessly (page 60).

Project Groups: To view or edit project group information. Add groups in this view, and assign a project group to each project using the Project Workspace view (page 61).

Rates & Billing section

Billing: To create, view, or edit invoices based on actual or fixed costs. You can also use this view to add or edit payments on invoices (page 127).

Rates: To create, view or edit pay and billing rate information. Add rates in this view, and assign them to employees (page 94).

Overtime Rates: To create, view or edit overtime rate information. Add overtime rates in this view, and assign them to each pay or billing rate as appropriate using the Rates view (page 97).

Regions: To establish specific tax rates on labor and expenses for each region or place of business. Add regions in this view and assign them to each client (page 130).

Integration section

Microsoft Project: To link project and task assignments created in Microsoft Project or Microsoft Project Server to DOVICO Timesheet (page 185).

Active Directory: To link Microsoft's Active Directory service employees to DOVICO Timesheet. It also authenticates DOVICO Timesheet logon user IDs and passwords against Active Directory (page 211).

QuickBooks: To link employee timesheet information from DOVICO Timesheet to QuickBooks for accurate billing purposes (page 201).

Import/Export: To communicate information between DOVICO Timesheet and other applications in many formats (text, comma separated, html, xml, etc) (page 218).

Advanced section

Workflow: To create time and expense approval workflows. These are required when time/expense entries must be approved by one or more managers before they can be used for billing, costing, project tracking or reporting (page 63).

Custom Field Templates: To create additional data fields permitting users to enter or track extra information when using the software (page 145).

Leave / Absences Rules: To create the policies that determine how much, and how fast, employees can accrue vacation, sick leave, and other leave (page 138).

Expense Categories: To create the expense categories (groups) used by employees when entering expenses. Creating categories helps organize expenses and provides greater flexibility when reporting (page 134).

Currencies: To create or edit relative currency values. Used for conversion purposes when entering expenses (page 136).

Security Groups: To create custom levels of security which, when applied to employees, restricts access to views and information (page 167).

Tools section

Job Scheduler: To automate functions such as sending reports and notices, or maintaining the database (page 165).

Approval Override: To bypass all time and expense approval paths and managers. Use it when an approving manager is not available and time or expenses must be approved (page 70).

Update Employee Properties: To quickly and easily adjust employee properties for all or multiple employees. Use it to save time when you need to make a change for a large number of employees (page 164).

Holiday Time Entry: To quickly and easily add a single time entry for all or multiple employees (page 161).

Bulk Time Move: To move time from project to project, task to task or any combination. (page 162)

Database Options: Use the Database Options tool to set or modify preferences for the database. Options include custom terminology, default settings, company information, etc (page 154).

Options: To configure other preferences when using administrative functions (page 150).

Timesheet options: To modify the time and expense entry screens for each employee. Modifications are limited to showing or hiding certain data entry or information fields, and setting the default day which starts each week (page 151).

Backup Audit Trail: To backup or extract audit trail information from the DOVICO Timesheet database (page 172).

Toolbar buttons

The following highlights toolbar buttons found throughout the application as well as some icons specific to certain views.

Common toolbar buttons

	Save: In most administrative views, Save must be used to save any new or edited information.
	New: In most administrative views, used to create a new item for the view.
	Delete: To delete the selected item (employees, projects, etc.) from the database. Once items have been deleted, they cannot be recovered.
	Properties: To view the selected item's properties.
	Filter: In most views, to apply a filter to display only specific information according to the criteria selected. In the Budgeted Time & Costs view, the budget filter can help locate which task assignments are over budget on time.
	Remove Filter: To remove an applied filter.
	Show / Hide Columns: To show or hide specific columns from a view.
	Copy: To copy a selected item in a view (only applicable in certain views).
	Paste: To paste the copied item.
	Custom Fields: To create a Custom Field template.
	Wizard: To launch the Wizard in the Budgeted Time & Costs or Actual Time & Costs views and quickly apply changes to multiple projects, tasks and employees.
	Help: To launch the Help system.
	About: To display information on the software version.
Logout	**Logout**: To logout of DOVICO Timesheet.
	Calendar: To select an alternate date for the item, time entry, expense, etc.
	Calculator: To convert an expense amount using the conversion rates established in DOVICO Timesheet.

Expenses Entry toolbar buttons

New Sheet	**Create a new sheet**: To create a new expense sheet.
	Submit: To submit an expense sheet to the database.
	Delete selected rows: To delete an expense entry (row) from the expense sheet grid.
	Delete expense sheet: To delete the entire expense sheet.
	Move selected row: To move an expense entry to a different expense sheet.
Administration	**Return to Administrative views:** To access the administrative functions. The administrative functions are only available to those with suitable **software access** rights and **security level**.

Time Entry toolbar buttons

	Submit: To send your time entries to the DOVICO Timesheet database.
	Rejected time entries: To see a list of weekly timesheets that contain rejected time entries.
	Start: To start timing on the selected task.
	Start From Last: To start timing on the selected task and to set the start time to equal the previous time entry's end time. The Show Start/End times option must be enabled to use Start From Last.
	Stop: To stop timing.
	Create a multiple row: To create an additional timesheet grid row for the selected task.
	Delete selected rows: To delete the selected time entry row from the timesheet grid.
	Offline: To work in an offline (disconnected) mode. While in Offline mode, time entry data is saved on the user's computer. When returning to "live" mode, the saved data is forwarded to the DOVICO Timesheet database.
	Synchronize: To temporarily reconnect to the database.
	Online: To reconnect to the database.
Administration	**Return to Administrative views:** To access the administrative functions. The administrative functions are only available to those with suitable **software access** rights and **security level**.

Reports Explorer toolbar buttons

	Print Preview: To preview the selected report.
	Add: To add a report or report folder.
	Rename: To rename a report folder.
	Delete: To delete a report or report folder.
	Report Properties: To view and edit a report's properties.
	Schedule Report: To schedule a report to run automatically.
	Report/Folder Security: To edit or apply security groups to the selected report or report folder.
	Create Custom Report: To customize the selected report.
	Import Report: To import a report.
	Export Report: To export the selected report.

Time Calendar toolbar buttons

	Reject Time entry: To reject submitted time or expense entries.
	View Timesheets: To display detailed approved timesheet information for the selected day.

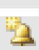
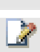
Time & Expense Approval toolbar buttons

	**Approve**: To approve submitted time or expense entries.
	**Approve by Exception**: To approve all unselected cells and reject all selected cells.
	**Reject**: To reject submitted time or expense entries.

Project Assignments toolbar buttons

	**New Client (details)**: To create a new client and enter detailed information.
	**New Client**: To quickly create a new client and only enter required information.
	**New Project (details)**: To create a new project and enter detailed information.
	**New Project**: To quickly create a new project and only required information.
	**Assign**: To assign employees to tasks or tasks to projects.
	**Unassign**: To remove assignments at the employee, task or project level.
	**Delete Filter**: To delete the saved filter.
	**Show / Hide Assignments**: To show/hide employee assignments in the time entry screen.
	**Rename**: To rename an employee, task, project, client, etc.
	**Project Estimate total**: To enter the estimated total number of hours (budgeted hours) that a project is scheduled to take to complete.
	**New**: To quickly create a new task, task group, employee or team and only enter the minimum amount of information.
	**New (details)**: To create a new task, task group, employee or team and enter detailed information.
	**Copy assignments**: To copy all assignments for a given employee to one or more other employees.

Job Scheduler toolbar buttons

	**New Database job**: To create a new automated database job.
	**New Notification job**: To create a new automated notification job.
	**New Reporting job**: To create a new automated reporting job.
	**Edit job**: To edit the selected job.

Upgrading to DOVICO Timesheet from Track-IT Suite

For those familiar with DOVICO Software's previous releases, the following highlights the major differences between Track-IT Suite 2005 and DOVICO Timesheet version 9.

One application; one login

With DOVICO Timesheet, all functions, views and tools (excluding Database Manager) are accessed through one browser-based application. Everything is accessed via a single logon page with employee security settings establishing what views and tools are available for each user.

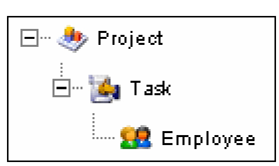
For those employees only entering time and expenses, only those screens are available. For managers and empowered employees, the single login gives them access to administrative functions permitting them to create, manage and report on projects, invoice clients, link to Microsoft Project, QuickBooks, etc., enter their own time and expenses, and any other function available for their security level.

What's New

Project Workspace
The Project Workspace section contains all the necessary views and functions to setup and manage your projects and project budgets. In one easy-to-use area, you have the ability to create clients, projects, tasks, employees, etc and to create project assignments. From Project Workspace, you can also create, monitor or adjust project time and expense budgets.

New Time Entry screen
DOVICO Timesheet's single time entry screen combines the best of our previous time entry views plus many new features to help simplify the time entry experience. Bulk Time and Timer functionality is now combined into a single, weekly timesheet grid. The addition of Favorites allows a user to populate the time entry grids with recurring task assignments. The hierarchical representation of clients, projects and task makes it easy to quickly locate any single assignment, and time entry users can also customize the level of details displayed for each time entry.

Project Assignment Hierarchy
With DOVICO Timesheet, the project assignment hierarchy has been modified so that it is now Project / Task / Employee. This now permits project structures to be organized before assigning employees.



Project Alerts
Project Alerts allow managers, executives and empowered employees to receive notices via e-mail when established targets for time or costs have been reached.

Mileage
Any 'rate based' expense can now be entered by employees by simply selecting the appropriate expense category, entering the total number of units with the resulting total value automatically calculated based on the 'cost per unit' established by management.

Bulk Time Move
The new Bulk Time Move utility gives system administrators the power to move an employee's time entries from project to project, task to task or in combination.

Copy employee assignments
The Copy Employee's Assignments function is a powerful feature permitting all assignments for a given employee to be copied onto one or more other employees. The feature is particularly useful when assignments are based on teams and a new employee joins the team or switches teams. It is also useful when assignments are primarily based on job descriptions and a new employee joins the company.

Active Directory
Simplify your Network identity management by using DOVICO Timesheet's integrated link to Microsoft's® Active Directory service. The Active Directory link allows employees to be imported from Active Directory and also authenticates DOVICO Timesheet user IDs and passwords against the information synchronized with Active Directory.

What's Improved

More E-mail Notifications
Now e-mails can be automatically sent to managers when they have time/expenses to approve, to employees when they have had time/expenses rejected and to managers when employees have not completed their timesheets.

Security On Costs
Restrictions on what information users can and cannot see has been further enhanced with the ability to hide cost and rate information in Administrative views and reports.

Reporting
The Reports Explorer structure has been completely re-organized to better group available reports. Many reports have also been renamed. See the help file's **Report Changes** topic for a comprehensive list of report modifications. While some reports have been removed, they are still available for downloading.

From the new Reports Explorer, you can now make additional reports available to the time entry users and you can directly schedule reports to be e-mailed to employees and clients (in PDF, Word, Excel, etc).

Other improvements
- Now when a task is moved to new or different task group, you have the option to update existing assignments.
- From each view, clicking the Help button will launch the help file for that specific view (context help).
- Login Passwords are now case sensitive.
- Microsoft Project Link: Optionally send ETCs or Status date from DOVICO Timesheet to Microsoft Project/Project Server.
- Time Entry: The time entry description field length is now 4000 characters.

New Names, New locations

While designing DOVICO Timesheet, we took the opportunity to include some of your suggestions about view names and their locations in the side navigation bar. See Side Navigation Bar (page 11) to review all views.

- The Employees, Tasks, Projects, Task Groups, Teams and Client views have now been merged into the Project Assignments view. These are also available from the Items List tab in the Project Workspace area.
- Receivables is now Billing.
- Track-IT link is now QuickBooks link.
- Estimated Expenses is now Budgeted Expenses.
- Matrix Approval is now Project Approvals.
- Timesheets is now Time Calendar.
- Time and Attendance Rules is now Leave/Absences Rules.
- Track-IT pro Assistant is now Job Scheduler.
- Approve view is now Time & Expense Approvals.
- The Project Budgets view has been split into 2 views: Budgeted Time & Costs and Actual Time & Costs.
- Add Time Entry is now Holiday Time Entry.

What's Gone

To keep up with market demands and technology changes, some Track-IT Suite functionality and views are not available in DOVICO Timesheet. The following lists those features which are not included in DOVICO Timesheet.

- Track-IT Punchclock
- Track-IT wireless
- Track-IT PDA
- Broadcast messaging
- Project Timesheet view
- Approve by exception for expenses
- Gantt view
- Print preview within views

PART

2

Administrative Functions

This part of the user's guide provides all the necessary information to use DOVICO Timesheet's administrative functions. The administrative functions contain all the tools and views required to setup, maintain, report on projects, project budgets, clients, tasks, employees and employee time and expenses.

For employees only required to **enter time** and **expenses**, instructions begin on page 230.

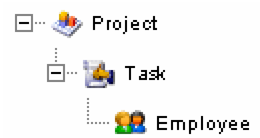
The Administrative functions in DOVICO Timesheet are limited to only those employees (administrators, managers, empowered employees) with suitable security settings and software access rights.

In Administrative Functions…

Assignments

In DOVICO Timesheet, **Assignments** are the unique links between projects, tasks, and employees that define how a project is organized for time entry. Assignments establish who works on what and are required before employees can begin to track their time on projects and tasks.

Before employees can begin tracking time, a few necessary steps are required to be completed. These are creating projects, tasks, employees and creating assignments.



Simplified assignment structure

The **Project Workspace** section contains most of the necessary views and functions to setup and manage your projects, tasks and employees.

In Assignments ...

Clients

In DOVICO Timesheet, **Clients** are companies, business units, or individuals for whom work is performed. Clients can be linked to specific projects if time or expenses associated with projects are billable. Clients are not required if your company does not bill clients or does not charge back to business units.

The clients created here become available as an optional selection for projects. As a result, any project can be associated to a client.

The following chapter describes how to **add** a **client** using the Project Assignments view.

Clients can be added in 2 ways:

- **OPTION A**: Add a client and **enter detailed information** for that client.
- **OPTION B**: Quickly add a client by entering only the **minimum amount of information**.

Clients can also be added using the **Client Items List** view (page 25).

Prerequisite:

- If you are planning to invoice clients for time and/or expenses, **Regions** should first be established.

OPTION A: To add a client with detailed information:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Select **New Client (Details)** in the drop-down list at the upper left corner of the view. If New Client (Details) was previously selected, simply click the **New Client (Details)** button located to the right of the drop-down list.

   A **client properties** window opens.
3. Enter a unique client **Name** (up to 250 characters).
4. A client abbreviation is automatically created using the first 3 letters of the client name. Optionally modify the client **Abbreviation** (up to 20 characters). If modifying the abbreviation, be sure to add a hyphen "-" at the end of the abbreviation. The client abbreviation must be unique.
5. (**Optional**) If you are creating invoices for this client, click the Address tab at the bottom of the client properties window and enter the address information which appears on the printed invoice. If multiple addresses are entered for a client, set the **Display** column to **Yes** for the address that you want to appear on invoices.
6. Click **Done** to automatically save the information and close the window.

OPTIONAL INSTRUCTIONS:

7. Enter a **Contact name**. This information is kept for reference purposes only and does not appear in reports or invoices.
8. Enter an **E-mail address** for the client. This e-mail address is used for automated reporting purposes (see Job Scheduler, page 165).
9. Select a **Region** from the drop-down list. The region is used to apply different tax rates to each place of business (i.e. state, province, country) when invoices are prepared. If no invoices are prepared, you can use regions to group clients for reporting purposes.
10. Check the **Hide** box if you want to hide this client from the list of available clients when generating reports.
11. Check the **Flag for archive** box if you want to remove this client from the database the next time the Archive Database function is run.

12. Click **Done** to automatically save the information and close the window.

Notes:

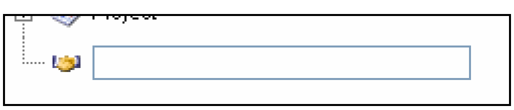
- If the **Create project for each new client** option is enabled (in Database Options, page 154), a project (with the same name as the client) is displayed under the client in the Project Assignments view.
- The first three letters of the client name are automatically used as an **abbreviation**. This abbreviation is displayed in front of a project name in various lists when a client is designated for that project. For example, when the project “Support” is assigned to the client “ACME”, the project name “ACM-Support” appears in certain lists.
- The full client name is added to the project name when displayed in tree structures (Project Assignments and Time Entry views). The client abbreviation or full client name can be hidden using the **Client Short name option** (in Database Options).
- A new client created in the Project Assignments view remains at the bottom of the assignment tree until the screen is refreshed. When refreshed, the new client appears with other clients, in alphabetical order.
- Renaming a client does not change the client's abbreviation.

Tips:

- You can add a new client by **right clicking** in the assignment tree pane.
- Additional tabs are available at the bottom of the client properties window to add **Notes**, **Phone Numbers** and **Addresses**.
- You can add fields to track extra client information by using **Custom fields**.
- The term "Client" can also be **customized** to better fit your company's terminology.

OPTION B: To quickly add a client:

1. Click the **Project Assignments** tab located in the Project Workspace view.
2. To **quickly** create a new client, select **New Client** in the drop-down list at the upper left corner of the view. If New Client was previously selected, simply click the **New Client** button located to the right of the drop-down list.
3. At the very bottom of the assignment tree, an **edit box** is displayed. Enter a **unique client name** (up to 250 characters).



4. Press **ENTER** or click elsewhere in the assignment tree to save the new client.

Notes about using Quick Add:

- Using this option (quick add) to add a client does not force the user to enter information in required custom fields.
- A new client created in the Project Assignments view remains at the bottom of the assignment tree until the screen is refreshed. When refreshed, the new client appears with other clients, in alphabetical order.

To add a client using the Items List view:

1. Click the **Items List** tab located in the Project Workspace view.
2. Select **Clients** in the drop-down list at the upper left corner of the view.
3. Click the **New** button located in the toolbar.
4. A **client properties** window opens. Enter client information as described in Option A (page 23).
5. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new client.

Note: The number of clients displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional pages.

Tips:

- To view or edit details for more than one client, open a client properties window and use the **Next Record** button (or Previous) to move to the next client record. Clicking the Next (or Previous) button automatically saves any changes made.
- Use the **Show/Hide column** function to personalize what information is displayed in the client list view's grid.
- **Double click** an item in the grid to see that item's **properties**.
- Use the **Filter** function to view only those clients assigned to a specific region.
- Use the **Find** function to locate a specific client by **name**.

Projects

In DOVICO Timesheet, **Projects** are the combined endeavors undertaken to create a unique product, service or result. A project is a fundamental component required for time tracking.

Project information can include details such as a project manager, project start/end dates and project status. Projects are displayed in multiple views (Project Assignments, Actual Expenses, time entry screen, etc) as an optional or mandatory selection.

The following describes how to **add** a **project** using the Project Assignments view.

Projects can be added in 2 ways:

- **OPTION A**: Add a project and **enter detailed information** for that project.
- **OPTION B**: Quickly add a project by entering only the **minimum amount of information**.

Projects can also be added using the Project Items List view (page 29).

Prerequisites:

- **Clients** should first be established if time or expenses associated with projects are billable.
- **Employees** should first be established to be able to designate a manager for a project.
- **Project Groups** should first be established if you want to be able to report on closely related projects that can be combined into logical groups. Project groups can be established or assigned at a later time without affecting existing time and expense data.

OPTION A: To add a project with detailed information:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. If **a client is associated** with the new project, then go directly to step 4. When a project is associated to a client, the combined client and project name (Client abbreviation + Project Name) appears in certain drop-down fields and reports throughout the application.
3. If **no client is associated** with the new project, then click the root **Assignments** icon and **go to step 5**. A client can always be associated to a project at a later time.

4. In the assignment tree, click on the **client** associated with the new project.
5. Select **New Project (Details)** in the drop-down list at the upper left corner of the view. If New Project (Details) was previously selected, simply click the **New Project (Details)** button located to the right of the drop-down list.

   A **project properties** window opens.
6. Enter a unique project **Name** (up to 250 characters). If a client is selected for this project, only the Client+Project name needs to be unique.
7. Click **Done** to automatically save the information and close the window.

OPTIONAL INSTRUCTIONS:

8. Select an employee from the **Manager** drop-down list. Assigning a manager to a project permits that person to manage and report on the project. The employee selected as manager must have a security level of Group Leader or above to view and report on this project. The list of employees displayed in the Manager drop-down list may be limited by your security setting.

9. Select a **Project Status** from the drop-down list. The status is the state of the project. Except for Estimate and Active, all other statuses are used for reporting and general information purposes only. See page 29 for more information on Project Status.
10. From the **Group by** drop-down list, select which project group to associate with this project.
11. Select the **Billing by** option from the drop-down list to establish the type of billing used for the project.
    - **Fixed cost**: The invoice total used in the Billing view is calculated according to a fixed amount. When you create an invoice for a fixed cost project, the invoice will not show detailed information (i.e. recorded hours worked, charge out rates).
    - **Actual hours**: The invoice total used in the Billing view is calculated according to the actual hours worked. When an invoice is created, you have the option to pick or exclude individual time and expense entries to include on the invoice.
    - **Estimated hours**: If Estimated hours is selected, the invoice total used in the Billing view is calculated according to the actual hours worked. For invoicing, there is no difference between selecting Actual hours or Estimated hours.

    When **Fixed Cost** is selected, a **Cost** field is displayed to the right of the Billing by drop-down list. Enter the **total fixed cost** for this project including any **applicable taxes**. When invoicing the client, this is the total which will be invoiced.

    Tip: The 'Billing by' terms can also be **customized** to better fit your company's terminology.

12. Modify the **Start** and **End dates** for the project. These dates are used for reporting purposes only.
13. Enter a **Description** for the project (up to 250 characters). This project description is available to those entering time on this project.
14. Check the **Hide** box if you want to hide this project from the list of available projects when generating reports.
15. Check the **Flag for archive** box if you want to remove this project from the database the next time the Archive Database function is run.
16. **Linked to:** When applicable, this displays the path link for this project to Microsoft Project or Microsoft Project Server.
17. The **Default Options** area specifies if all future time or expense entries relating to this project automatically appear with their billable option checked or un-checked. For example, if 'Time entries billable by default' is checked, an employee entering time, or an expense, against this project will have the billable option pre-checked. Check or un-check each option as required for the project.

    Notes:
    - Default Options should be set **before** any **assignments are made** for a project. Changes made to the Default Options after assignments are made will not be reflected in existing assignments. If the Default Options are modified after assignments are made, you can use the **Budgeted Time & Costs** view to adjust the existing assignments.
    - This option applies the same billable default setting for all assignments within the project. If you require mixed default settings within a project, you can edit the billable/non-billable default setting for individual assignments by using the Budgeted Time & Costs view.

18. In the **Task Assignments** area, check the appropriate boxes to limit when assignments are displayed to employees based on each task assignment's Start and Finish dates. Task assignment's scheduled Start and Finish dates are established in the **Budgeted Time & Costs** view. See **Only Display Scheduled Assignments** (page 58) for a more in-depth explanation of how this works.
    - **Hide Tasks**: Use this option to simply reduce the list of available tasks displayed in the time entry's assignment tree to only those tasks scheduled to be worked on during the displayed week. With the **Hide Tasks** option, tasks are simply "out-of-sight". If required, employees can still track time against these hidden tasks by using the time entry's **Show All** function.

- **Prevent Entries**: Use this option to completely prevent time entry users from tracking time against tasks when the tasks are not scheduled to be worked on. When the **Prevent Entries** box is checked, tasks not scheduled for work, during the displayed week, are not displayed in the time entry's assignment tree. Tasks scheduled for work during only a portion of the week are displayed in the assignment tree but have restrictions placed on them in the time entry grid.

19. Click **Done** to automatically save the information and close the window.

Warning: The Leave/Absences project is a built-in project used to track time against vacation, sick leave, holidays, etc. This project cannot be deleted. The project can be renamed but should not be used for other purposes.

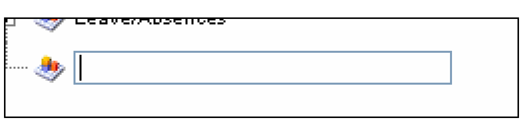
Note: A new project created in the Project Assignments view remains at the bottom of the assignment tree until the screen is refreshed. When refreshed, the new project is displayed in alphabetical order.

Tips:

- You can add a new project by right clicking in the assignment tree pane.
- Additional tabs are available at the bottom of the project properties window to add **Notes**, **Phone Numbers** and **Addresses**.
- You can add fields to track extra project information by using **Custom fields**.
- The term "Project" can also be **customized** to better fit your company's terminology.

OPTION B: To quickly add a project:

1. Click the **Project Assignments** tab located in the Project Workspace view.
2. If **a client is associated** with the new project, then go directly to step 4.
3. If **no client is associated** with the new project, then click the root **Assignments** icon and **go to step 5**. A client can always be associated to a project at a later time.
4. In the assignment tree, click on the **client** associated with the new project.
5. Select **New Project** in the drop-down list at the upper left corner of the view. If New Project was previously selected, simply click the **New Project** button located to the right of the drop-down list to create a new project.
6. If there is no associated client to the new project, an **edit box** is displayed at the very bottom of the assignment tree. If there is an associated client, the edit box will be displayed under that client. Enter a unique project **name** (up to 250 characters).



7. Press **ENTER** or click elsewhere in the assignment tree to save the new project.

Note: Using this option (quick add) to add a project does not force the user to enter information in required custom fields.

Add a project using the Items List view:

1. Click the **Items List** tab located in the Project Workspace view.
2. Select **Projects** in the drop-down list at the upper left corner of the view.
3. Click the **New** button located in the toolbar.
4. A **project properties** window opens. Enter project information as described in Option A (page 26).
5. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new project.

Note: The number of projects displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional pages.

Tips:

- To view or edit details for more than one project, open a project properties window and use the **Next Record** button (or Previous) to browse to other projects. Clicking the Next (or Previous) button automatically saves any changes made.
- Use the **Show/Hide column** function to personalize what information is displayed in the project list view's grid.
- **Double click** an item in the grid to see that item's properties .
- Use the **Filter** function to view only the projects having a certain status, or belonging to a specific project group or client.
- Use the **Find** function to locate a specific project by **name**.

Project Status

The **Project Status** defines the current state of a project. Except for Estimate and Active, all other statuses are used for reporting and general information purposes only. A project's status can be changed by editing that project’s properties.

- **Estimate**: Used when estimated hours need to be entered when preparing a project budget. When the project status is set to Estimate, all assignments for that project are available for time and expense entry.
- **Quotation**: Used to prepare a project for approval by the client before it can be activated. When set to this status, a project will not be available for time or expense entry.
- **Active**: Used to activate the project for time and expense entry. When the project status is set to Active, estimated hours can no longer be edited and all assignments for that project are available for time and expense entry. Hours can be added to the estimate by using adjusted hours.
- **Rejected**: Used when a project is not accepted by the client. When set to this status, a project will not be available for time or expense entry.
- **Terminated**: Used when a project is terminated before completion. When set to this status, a project will not be available for time or expense entry.
- **Finished**: Used when a project is completed. When set to this status, a project will not be available for time or expense entry.

The project status names can be **customized** to better fit the terminology used by your profession, industry or company.

Creating a Project Template

This is a very powerful time saving feature. One benefit of creating a template is having a common starting point or structure when creating a new project.

To create a project template:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Click the root **Assignments** icon at the top of the view.

3. Select **New Project (Details)** in the drop-down list at the upper left corner of the Project Assignments view.

   A **project properties** window opens.
4. Optionally select a **client** from the drop-down list if this project template is for a specific client.
5. Enter a unique **project name** (up to 250 characters). The name should identify this project as a template.
6. Set the project **Status** to **Finished** so that this project template is not available for time or expense entry.
7. Optionally enter additional project information as required.
8. Click **Done** to automatically save the information and close the window.
9. In the Assignment tree, select the project template and click the **Assign** button located on the toolbar. The **Assignments List** window opens.
10. Select one or more **tasks** (or task groups) to assign to this project and click **OK**. To select more than one item, hold the **Ctrl** key while making your selections.
11. If you want employee assignments to be included in the project template, click on each task and assign employees by clicking on the **Assign** button.
12. Optionally use the **Budgeted Time and Costs** view to add, edit or adjust any estimate information for each task assignment.

The project template is now available to **copy and paste**.

Tasks

Tasks are activities or work efforts against which employees track their time. Tasks are fundamental components required for time tracking. Before employees can begin tracking time, tasks must first be assigned to projects and then employees must be assigned to tasks.

The following describes how to **add** a **task** using the Project Assignments view. Tasks can be generic and assigned to multiple projects (meeting, planning, etc.) or can be specific to only one project.

Tasks can be added in 2 ways:

- **OPTION A**: Add a task and **enter detailed information**.
- **OPTION B**: Quickly add a task by entering only the **minimum amount of information**.

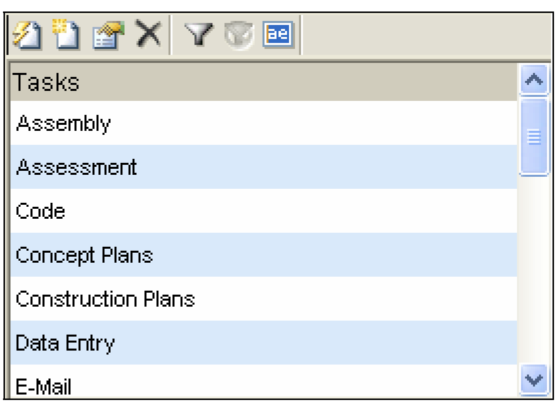
Tasks can also be added using the Tasks Items List view (page 33).

Prerequisites:

- **Task Groups** should first be established if you are planning to combine specific tasks to form a group.
- **Employees** should first be established to be able to designate a manager for a task.

OPTION A: To add a task with detailed information:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Locate the Task list pane (upper right).



3. Click the **New (Details)** button  in the Task pane toolbar.

   A **task properties** window opens.
4. Enter a unique task **Name** (up to 250 characters).
5. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new task.

OPTIONAL INSTRUCTIONS:

6. Select a task group from the **Group by** drop-down list.

   A **More** button is displayed to the right of the Task Group field whenever a task is assigned to a task group. When a task is assigned to a task group, previous assignments made using this task group are not automatically updated. Click the **More** button to select how previous assignments made using this task group are modified. See page 35 for full details on how the More button works for tasks.

7. Select an employee from the **Manager** drop-down list. Assigning a manager to a task permits that person to manage and report on the task. The employee selected as manager must have a security level of Group Leader or above to view and report on this task. The list of employees displayed in the Manager drop-down list may be limited by your security setting.
8. Enter a **Description** for the task (up to 250 characters). This description is available to those entering time against this task.
9. Enter a **Prorating** for this task. The prorating value is used to assign a proportionate value to this task when billing clients on time spent on this task. See **Proratings** on page 34 for a detailed explanation of how proratings are used in calculating client costs.

   Example: The task called MEETING has a prorating of 2 and Jane's hourly rate charged is $100 per hour, the client cost for this task will be calculated as follows: $100 x 2 x the number of billable hours worked.
10. Check the **Global box** if you want this task to be assigned to all projects that do not have specific assignments. For projects that have no specific assignments, global tasks are automatically assigned to the project and all employees are assigned to the global task.
11. Check the **Hide** box if you want to hide this task from the list of available tasks when generating reports.
12. Check the **Flag for archive** box if you want to remove this task from the database the next time the Archive Database function is run.
13. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new task.

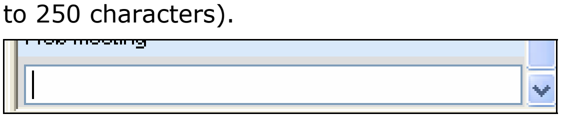
Warning: If a task is deleted, all the hours worked for that task are also deleted. All project costs and estimates associated with the task are also deleted. Instead, consider using the **Archive** function.

Tips:

- Use the **Filter** function to view only those tasks assigned to a specific task group or manager.
- You can add a new task by right clicking in the task list pane.
- Additional tabs are available at the bottom of the task properties window to add **Notes**, **Phone Numbers** and **Addresses**.
- You can add fields to track extra task information by using **Custom fields**.
- The term "Task" can also be **customized** to better fit your company's terminology.

OPTION B: To quickly add a task:

1. Click the **Project Assignments** tab located in the Project Workspace view.
2. Locate the Task list pane (upper right).
3. Click the **New** button in the task pane toolbar.
4. At the very bottom of the task list, an **edit box** is displayed. Enter a unique **name** for the task (up to 250 characters).



5. Press **ENTER** or click elsewhere to save the new task.

Note: Using this option (quick add) to add a task does not force the user to enter information in required custom fields.

To add a task using the Items List view:

1. Click the **Items List** tab located in the Project Workspace view.
2. Select **Tasks** in the drop-down list at the upper left corner of the view.
3. Click the **New** button located in the toolbar.
4. A **task properties** window opens. Enter task information as described in Option A (page 31).
5. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new task.

Note: The number of tasks displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional pages.

Tips:

- To view or edit details for more than one task, open a task properties window and use the **Next Record** button (or Previous) to browse to other tasks. Clicking the Next (or Previous) button automatically saves any changes made.
- Use the **Show/Hide** column function to personalize what information is displayed in the task list view's grid.
- **Double click** an item in the grid to see that item's properties .
- Use the **Filter** function to view only those tasks assigned to a specific task group or manager.
- Use the **Find** function to locate a specific task by **name**.

Prorating

Proratings are variables assigned to **tasks** (page 31) and **overtime rates** (page 97) used in calculating client costs. The following details how proratings are used in calculating client costs and describes the different options for editing proratings.

Task prorating:

When you assign a prorating to a task, that prorating value is multiplied by the employee's rate charged (billing rate) and the number of hours worked against that task to calculate the **client cost** for that task. By default, each task is assigned a prorating value of 1.

Example: The task called Audit has a prorating of 1.25 and Jane's hourly rate charged is $100 per hour, the client cost for a 2 hour time entry on this task is calculated as follows:

$100 rate charged x 1.25 task prorating x 2 hours = $250.

Task proratings can be edited from:

1. **Tasks**: When you edit a task prorating from the Tasks view, the new value will be used on all future time entries, unless the prorating for a specific task assignment was modified using the Budgeted Time & Cost view. (see 2 and 3 below).
2. **Budgeted Time & Cost**: When you edit the task prorating from this view, the new value will only be applied to future time entries on the specific project/task assignments selected.
3. **Project Assignments**: When you edit an **assignment's properties** from this view, the new value will only be applied to future time entries on the specific project/task assignment selected.
4. **Actual Time & Costs**: When you edit the task prorating from this view, this will apply the new value to the approved time entries selected.

Overtime prorating:

When you assign a prorating to an overtime rate, the **client cost** calculation is the same as described above except that employee's rate charged (billing rate) is also multiplied by the overtime rate prorating when the time entry is submitted as overtime. By default, each overtime rate is assigned a prorating value of 1.

Example: If Jane submits a time entry for 2 overtime hours (with an overtime prorating of 1.5) on the same Audit task described above, the client cost for this time entry is calculated as follows:

$100 rate charged x 1.25 task prorating x 2 hours x 1.5 overtime prorating = $375.

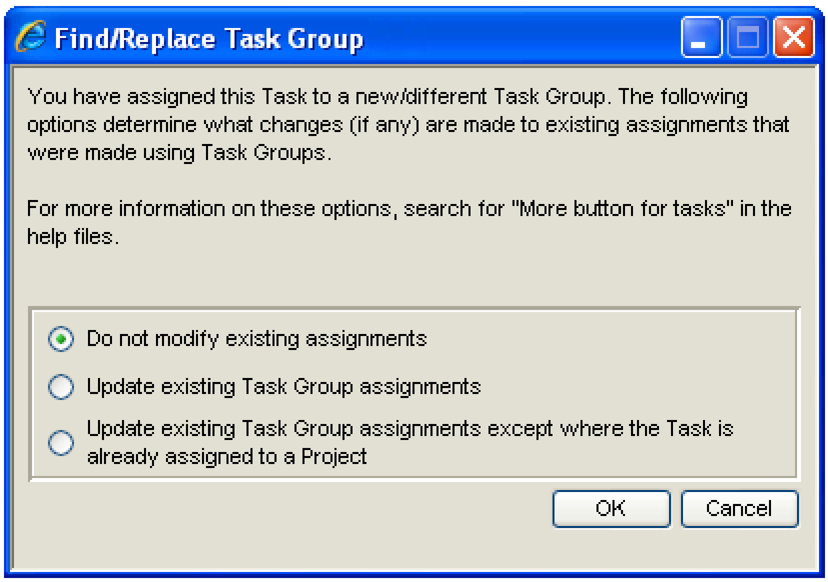
Overtime proratings can be edited from:

1. **Overtime Rates**: When you edit an overtime prorating from this view, the new value will be used on all future time entries.
2. **Actual Time & Costs**: When you edit an overtime prorating from this view, this will apply the new value to the approved time entries selected.

"More" button for Tasks

When a task is assigned to a task group for the first time, or when a task is assigned to a new or different task group, 3 options are available that determine what changes, if any, are made to existing assignments that were made using task groups.

The following details the 3 available options.



Option 1: Do not modify existing assignments
No changes are made to existing task group assignments. The next time the task group is assigned to a project, the task will appear within the task group.

Option 2: Update existing Task Group assignments
All existing assignments made using this task group will be updated with the task. If the task was not previously assigned, it will be added to the task group. If the task was previously assigned, it will be moved to the task group.

Option 3: Update existing Task Group assignments except where this Task is already assigned to a Project
For each project, the task group assignments will be updated only if the task was not previously assigned to the project.

> **Note:** It is important to remember that a task can only belong to one task group and that a task can only be assigned to a project once.

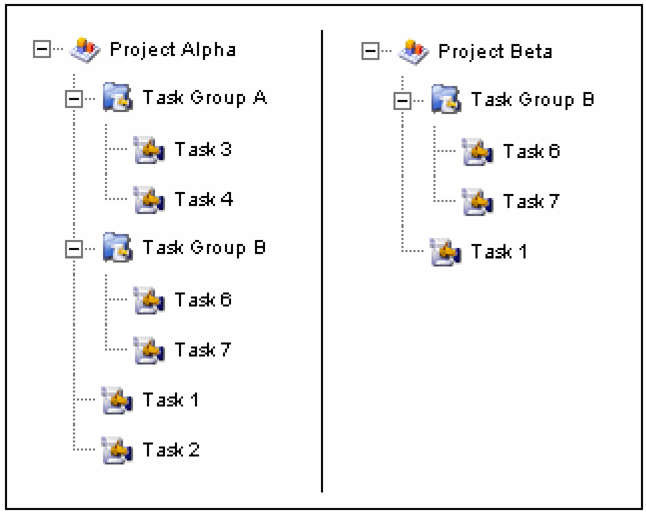
The following details how each option affects assignments for 2 sample projects (Alpha and Beta). Each project has assignments made by task groups as well as assignments made without task groups. To simplify the explanations, the employees assigned to each task are not displayed.

Two scenarios are detailed:

Scenario A: A new task is created and assigned to an existing task group.
Scenario B: An existing task is moved from one task group to another.

Scenario A: A new task is created and assigned to an existing task group.

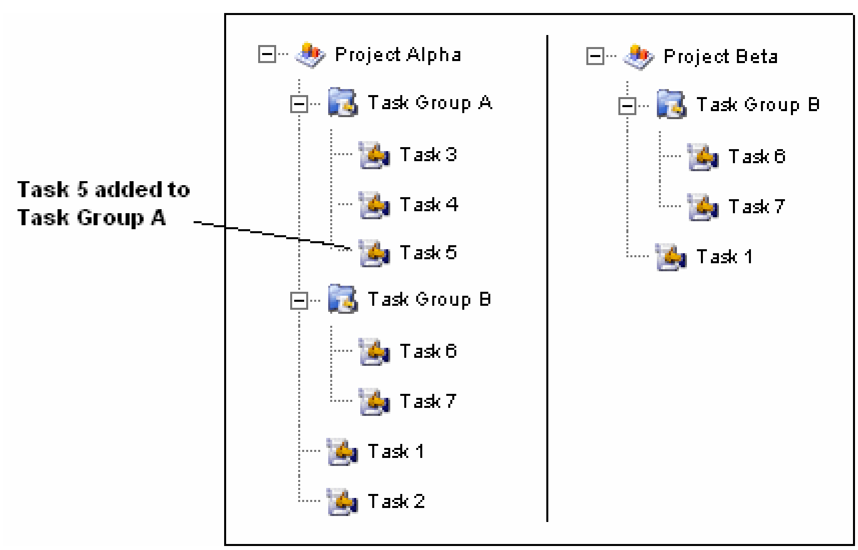
In the following scenario, Task 5 is a new task and is assigned to existing Task Group A.



Assignments before the change.

Option 1: Do not modify existing assignments.
No automatic modifications are made to existing assignments. Task 5 only appears in Task Group A the next time Task Group A is assigned to a project.

Option 2: Update existing Task Group assignments.
In Project Alpha, Task 5 is added to Task Group A. In Project Beta, Task Group A is not used and therefore Task 5 is not added to the project.

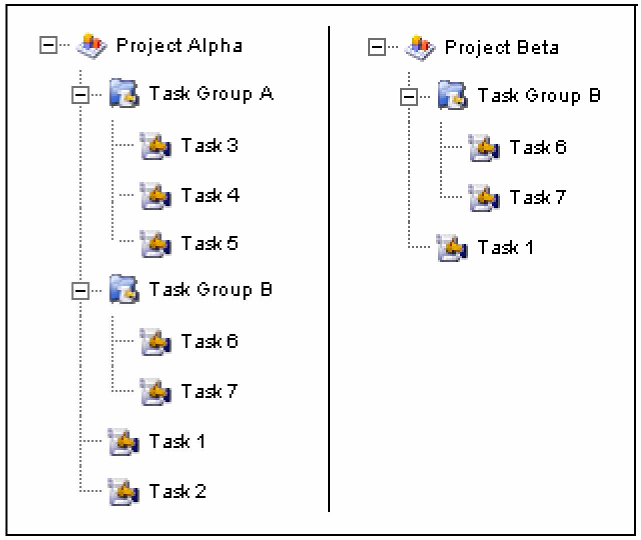


Assignments after using option 2

Option 3: Update existing Task Group assignments except where this Task is already assigned to a Project
Because this is a new task (and therefore new to all projects), Task 5 will be added to all projects using Task Group A. For this scenario, options 2 and 3 have the same effect.

Scenario B: An existing task is moved from one task group to another.

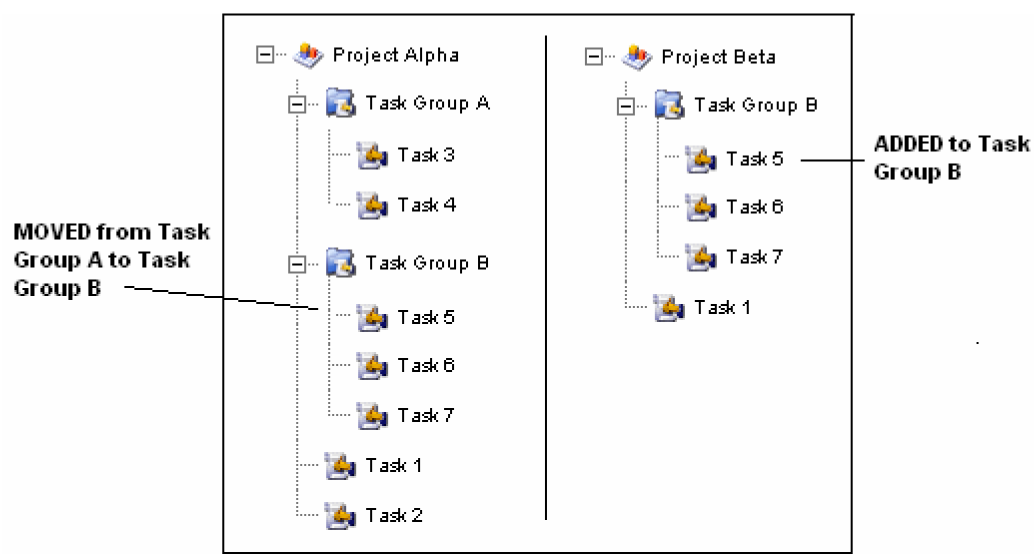
In the following example, Task 5 is reassigned from Task Group A to Task Group B.



Assignments before the change.

Option 1: Do not modify existing assignments.
No automatic modifications are made to existing assignments. Task 5 only appears in Task Group B the next time Task Group B is assigned to a project.

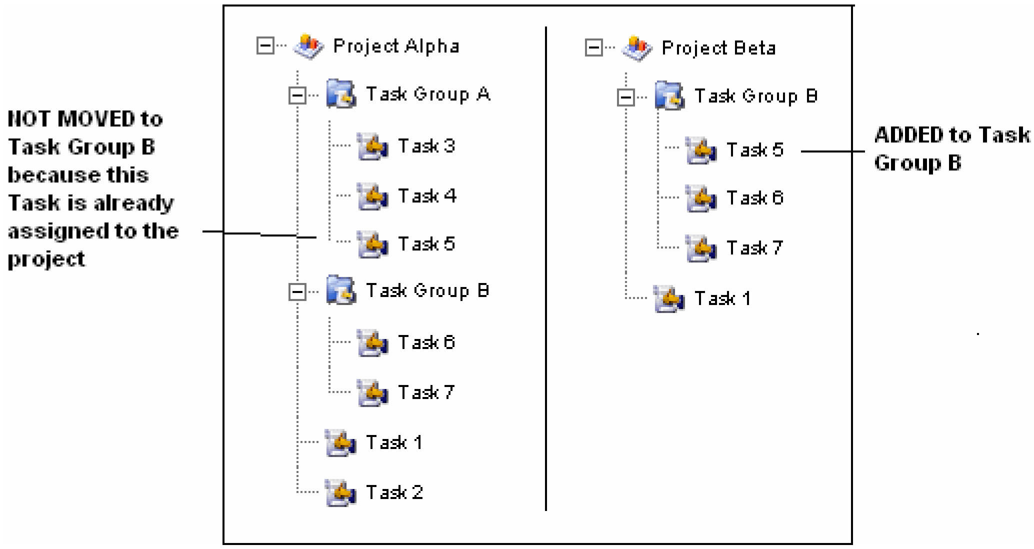
Option 2: Update existing Task Group assignments.
For Project Alpha, Task 5 is moved from Task Group A to Task Group B. For Project Beta, Task 5 is added to Task Group B.



Assignments after using option 2

Option 3: Update existing Task Group assignments except where this Task is already assigned to a Project

For Project Alpha, Task 5 is not moved to Task Group B because it was already assigned to this project. Alternately, for Project Beta, Task 5 appears in Task Group B because Task 5 was not previously assigned to this project.



Assignments after using option 3

Task Groups

Task Groups are specific tasks combined in one category to form a group. Task Groups are useful if your projects have some common, well-defined structures (sub-levels of information). Task Groups can simplify how assignments are made and how reporting is accomplished on similar types of work.

For example; if many projects have a common phase requiring employees to create specifications, you can create a task group called "Specifications" and assign precise specification-type tasks to this group. You then assign the task group to one or more projects and then have the ability to monitor and report on how much time is spent on "Specifications" as a general category rather than the individual specification-type tasks.

The following describes how to **add** a **task group** using the Project Assignments view.

Task Groups can be added in 2 ways:

- **OPTION A**: Add a task group and **enter detailed information**.
- **OPTION B**: Quickly add a task group by entering only the **minimum amount of information**.

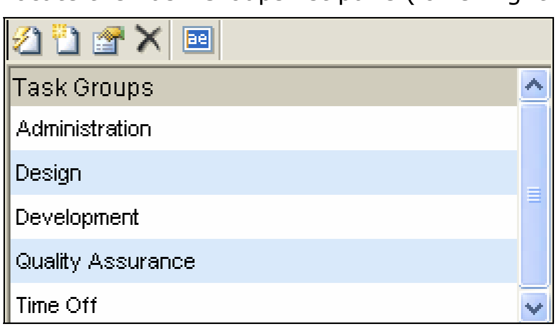
Task Groups can also be added using the Task Groups Items List view (page 40).

Prerequisite:

- **Employees** should first be established to be able to designate a manager for a task group.

OPTION A: To add a task group with detailed information:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Locate the Task Groups list pane (lower right corner).



3. Click the **New (Details)** button  in the Task Group pane toolbar.

   A **task group properties** window opens.
4. Enter a unique task group **Name** (up to 250 characters).
5. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new task group.

OPTIONAL INSTRUCTIONS:

6. Select an employee from the **Manager** drop-down list. Assigning a manager to a task group permits that person to manage and report on that group. The employee selected as manager must have a security level of Group Leader or above to view and report on this task group. The list of employees displayed in the Manager drop-down list may be limited by your security setting. If necessary, select an alternate **As of** date. The As of date is used for information purposes only.

7. Enter a **Description** for the task group (up to 250 characters).
8. Check the **Hide** box if you want to hide this task group from the list of available task groups when generating reports.
9. Check the **Flag for archive** box if you want to remove this task group from the database the next time the Archive Database function is run.
10. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new task group.

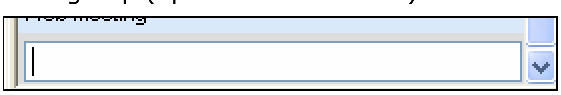
Tips:

- You can add a new task group by right clicking in the task group list pane.
- Additional tabs are available at the bottom of the task group properties window to add **Notes**, **Phone Numbers** and **Addresses**.
- You can add fields to track extra task group information by using **Custom fields**.

Warning: If a task group is deleted, all assignments made using the task group are deleted along with any estimate information entered for those assignments. Time entries associated with the task group are not deleted.

OPTION B: To quickly add a task group:

1. Click the **Project Assignments** tab located in the Project Workspace view.
2. Locate the Task Groups list pane (lower right corner).
3. Click the **New** button in the task group pane toolbar.
4. At the very bottom of the task group list, an **edit box** is displayed. Enter a unique **name** for the task group (up to 250 characters).



5. Press **ENTER** or click elsewhere to save the new task group.

Note: Using this option (quick add) to add a task group does not force the user to enter information in required custom fields.

To add a task group using the Items List view:

1. Click the **Items List** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Select **Task Groups** in the drop-down list at the upper left corner of the view.
3. Click the **New** button located on the toolbar.
4. A **task group properties** window opens. Enter task group information as described in Option A (page 39).
5. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new task group.

Note: The number of task groups displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional pages.

Employees

Employees are those individuals who track time and expenses. Employees are also those who setup, manage, monitor or report on project activities.

The **Employees** list pane in the Project Assignments view is the location where employees using DOVICO Timesheet are listed. For each employee, a profile stores their user id, password, security level, their pay/charge out rates and many more useful details. The employee profile also establishes the employee's approval workflow and Leave/Absences information.

Employees are displayed in multiple views (Project Assignments, Task Groups, etc) as an optional or mandatory selection.

The following describes how to (1) **add** an **employee** using the Project Assignments view. It also details how to (2) assign approval workflows to the employee's time and expenses and how to enter Leave/Absences information.

Employees can be added in 2 ways:

- **OPTION A**: Add an employee and **enter detailed profile information**.
- **OPTION B**: Quickly add an employee by entering only the **minimum amount of information**.

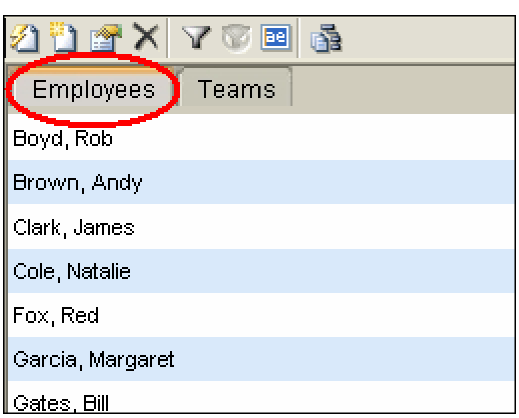
Employees can also be added using the Employees Items List view (page 45).

Prerequisites:

- **Teams** should first be established if you are planning to group employees in a team, department or division.
- **Rates** should first be established if you are tracking company or clients costs on the time entered by employees.
- **Workflows** should first be established if employee timesheets require approvals.
- **Leave / Absences** rules should first be established if you are using DOVICO Timesheet to accrue vacation, sick leave or other types of leave for employees.

OPTION A: To add an employee with detailed information:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Locate the Employees list pane (middle right) and verify that the **Employees tab** is selected.



3. Click the **New (Details)** button in the employee pane toolbar.

   An **employee properties** window opens.

4. Enter the employee’s **Last name** (up to 100 characters).
5. Enter the employee’s **First name** (up to 100 characters).
6. Enter the employee's unique **User ID** and **Password** (**case sensitive**), up to 100 characters each). These should be communicated to the employee as they are required to login to DOVICO Timesheet. Employees are able to change their own passwords using an option within the Time Entry screen.
7. (**Optional**) Select a **Team** from the drop-down list. If necessary, select an alternate **Effective Date**.
8. Select a **Security level** from the drop-down list. The security level restricts access to different views. See Internal Security Groups (page 169) for a detailed description of the default security groups.
   - **Administrator**: Employees assigned to this security level can edit, add, delete, view and print information in every part of the software.
   - **Manager**: Employees assigned to this security level can edit, add, delete, view and print information from most views.
   - **Time and Expense entry**: Employees assigned to this security level only have access to time & expense entry. Access to administrative functions are denied.
   - **Group Leader**: Employees assigned to this security level can edit, add, delete, view and print information in only a limited number of views.
   - **Auditor**: Employees assigned to this security level can only view, print and export report information. All other DOVICO Timesheet options and views are inaccessible.
9. Select the **Software access** level for this employee from the drop-down list:
   - [**None**]: This employee cannot access any DOVICO Timesheet component or view.
   - [**Time and Expense Entry only**]: This employee has access to only time and expense entry views.
   - [**All**]: This employee has access to administrative and time and expense entry views.
10. (**Optional**) Select a **Rate of wages** from the drop-down list.

    Note: Whenever a **Rate of wages** or **Rate charged** is added or changed, a "**More**" button appears next to the Rate field. When changing a rate for an employee, click the **More** button and select one of the available options. When adding a new employee, this button can be ignored.

11. (**Optional**) Select a **Rate charged** from the drop-down list.
12. Select a **Start date** for the employee.
13. Select an **End date** for the employee.
14. (**Optional**) Enter the employee’s e-mail address in the **E-mail address** field (up to 250 characters). The Job Scheduler uses this e-mail address when sending Automated Reports and Notifications.
15. (**Optional**) Check the **Flag for archive** box if you want to remove this employee from the database the next time the Archive Database function is run.
16. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new employee.

Notes:

- Employees can also be imported from **Active Directory** (page 211) or from other file types using the **Import/Export** tool (page 218).
- The First and Last names of employees imported from Microsoft Project cannot be edited.
- For employees linked to Active Directory, the First name, Last name, User ID, Password and E-mail Address fields cannot be edited.
- Before changing a rate of wages or rate charged, make certain that employees have submitted their timesheets, since changes may affect time entries entered but not submitted.

Warning: If an employee is deleted, all the hours worked for that employee are also deleted. All expenses entered by the employee are deleted. All related information: hours worked for projects, project costs associated with the employee, estimates created for this employee are also deleted and cannot be recovered. Instead, consider using the **Archive** function.

Tips:

- The term "Employee" can also be customized to better fit your company's terminology.
- Use the **Filter** function to view only those employees assigned to a specific team.
- Different pay and billing rates can be applied to specific employee, project and task combinations by using the Budget Wizard.
- If an employee leaves your company or stops using DOVICO Timesheet, you can free that license while keeping the employee's data by setting the **Software Access** field to **None**.
- You can add a new employee by right clicking in the employee list pane.
- Additional tabs at the bottom of the employee properties window are available to add **Notes**, **Phone Numbers** and **Addresses**.
- You can add fields to track extra employee information by using **Custom fields**.
- Use the **Assignment Copy** function to copy one employee's assignment to one or more other employees.

To specify additional employee settings:

The employee properties window's **Additional tab** permits **Approval Workflows. Leave / Absences rules** and **Instant Email Notifications** to be assigned to each employee.

1. Select an **employee** from the employee list pane and click the **Properties** button.

   The employee **properties window** opens.

2. Click the **Additional tab** located at the bottom of the window.

Assigning an approval workflow to an employee

When an approval workflow is assigned to an employee, that employee's submitted timesheets are automatically forwarded to the manager(s) designated in the approval workflow. Employees can be assigned to a Timesheet Approval workflow and/or an Expense Approval workflow.

a) For **Timesheet approval**, select the appropriate approval workflow from the Timesheet approval drop-down list.

b) For **Expense approval**, select the appropriate approval workflow from the Expense approval drop-down list.

Entering leave / absences information and assigning accrual rules

In this step, an employee number, the number of work days per week and the number of hours per day for an employee are established. Leave/Absences rules, that calculate the number of sick days, vacation, flex time, etc. that employees are eligible to take, can also be assigned.

Warning: If you switch an employee's Leave/Absences rule, any manual adjustments made (see step 'e' below) to the original rule will be lost.

a) Enter an **Employee Number** if applicable. This field is for information purposes only.

b) Enter the number of days that the employee works per week in the **Work days** field.

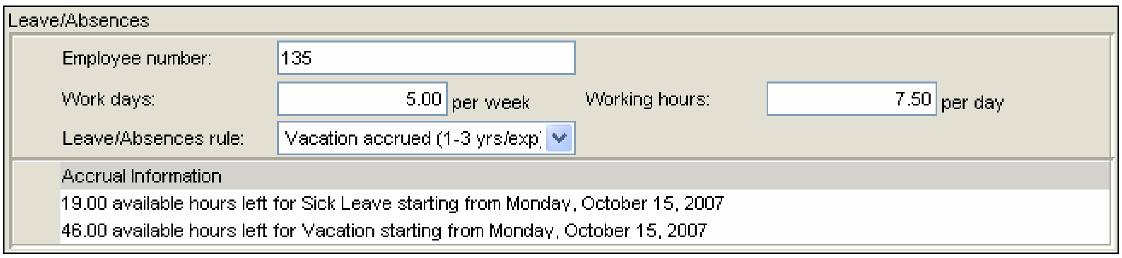
c) Enter the number of hours that the employee works per day in the **Working hours** field. The Working hours per day data is only required when employee accruals are calculated on a daily basis (see Leave/Absences rules, page 138).

d) Select a **Leave / Absences rule** from the **Rule** drop-down list.

e) When a Leave/Absences rule is selected, the **Accrual information** window displays, for each accrual, the calculated hours accrued and the accrual start date. Click any row to make adjustments to the **Accrue From date** for the rule and the **number of hours** (adjustment) to add to the rule. Click **OK** when done.

> **Warning:** Only 1 Accrual adjustment can be made for each accrual rule. If a second adjustment is required, then this adjustment should be the total of the previous and new adjustments. Example; Joe had a previous adjustment of 10 hours. His manager has granted him 5 additional hours, therefore the new adjustment must be set to 15.

f) Click **Done** to automatically save the information and close the window.



Select Instant Email Notifications for the employee

The Instant Email Notifications options allow an employee to be notified by e-mail whenever time or expenses have been rejected by their approving manager, or to be notified whenever the employee (as an approving manager) must approve time or expenses for other employees.

a) **Check** one or more options:

- **Notify 'this employee' when there is time to approve**: Check this option to send an e-mail to this employee whenever a timesheet is awaiting his/her approval. This option is only applicable if this employee is a designated approving manager for employee timesheets. See Note which follows.
- **Notify 'this employee' when there are Expenses to approve**: Check this option to send an e-mail to this employee whenever an expense sheet is awaiting his/her approval. This option is only applicable if this employee is a designated approving manager for employee expenses. See Note which follows.
- **Notify 'this employee' when time/Expenses have been rejected**: Check this option to send this employee an e-mail whenever one of his/her time or expense sheets has been rejected.

> **Note:** Consideration should be taken before selecting either of the first 2 options: Time awaiting approval or expenses awaiting approval. Either of these options will immediately send an e-mail each time an employee submits a time/expense sheet. If the employee is approving for many employees, then his/her e-mail inbox could be flooded with approval notices. An alternate method is to use the Scheduled Notification feature (page 102) which will only send 1 e-mail summarizing all time and expenses to be approved.

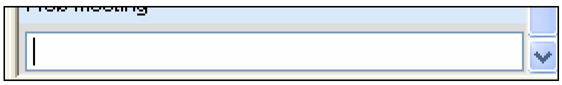
b) (**Optional**) Modify the text used in the Notification E-mail. See Changing Notification text (page 124) for complete instructions on modifying the e-mail text.

Tips:

- The default selections displayed for Instant Email Notifications can be changed using the Notifications tab in the Database Options view (page 158).
- You can modify the Instant Email Notification option for multiple employees by using the Update Employee Properties view (page 164).

OPTION B: To quickly add an employee:

1. Click the **Project Assignments** tab located in the Project Workspace view.
2. Locate the Employees list pane (middle right) and verify that the **Employees tab** is selected.
3. Click the **New** button in the employee pane toolbar.
4. At the very bottom of the employee list, an **edit box** is displayed. Enter the employee name in the following format (case sensitive): **Last name, First name**.



5. Press **ENTER** or click elsewhere to save the new employee.

> **Warning:** At this point, this new employee has been assigned a user id (first initial, last name) and a **random password**. You will have to modify this employee's password before this employee can access DOVICO Timesheet. All employee properties (including the password) can be modified by selecting the employee and clicking the **Properties** button in the **Employee pane toolbar**.

> **Note:** Using this option (quick add) to add an employee does not force the user to enter information in required custom fields.

To add an employee using the Items List view:

1. Click the **Items List** tab located in the Project Workspace view.
2. Select **Employees** in the drop-down list at the upper left corner of the view.
3. Click the **New** button located in the toolbar.
4. An **employee properties** window opens. Enter employee information as described in Option A (page 41).
5. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new employee.

> **Note:** The number of employees displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional pages.

Tips:

- To view or edit details for more than one employee, open an employee properties window and use the **Next Record** button (or Previous) to browse to other employees. Clicking the Next (or Previous) button automatically saves any changes made.
- Use the **Show/Hide** column function to personalize what information is displayed in the employee list view's grid.
- **Double click** an item in the grid to see that item's properties .
- Use the **Filter** function to only view those employees assigned to a specific team, security level, etc.
- Use the **Find** function to locate a specific employee by **name**.

Teams

Teams are used to group specific employees in a team, department or division. Using teams provides flexibility when assigning employees to tasks as well as flexibility in reporting by being able to create summary time or costs reports at the team level.

Teams are displayed as an optional selection in employee profiles. As a result, any employee can be assigned to a team.

The following describes how to **add** a **team** using the Project Assignments view.

Teams can be added in 2 ways:

- **OPTION A**: Add a team and **enter detailed information**.
- **OPTION B**: Quickly add a team by entering only the **minimum amount of information**.

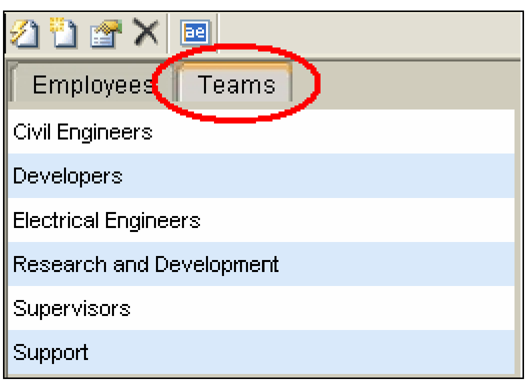
Teams can also be added using the Teams Items List view (page 47).

Prerequisite:

- **Employees** should first be established to be able to designate a manager for a team.

OPTION A: To add a team with detailed information:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Locate the Teams list pane (middle right) and verify that the **Teams tab** is selected.



3. Click the **New (Details)** button in the Team pane toolbar.

   A **team properties window** opens.
4. Enter a unique team **Name** (up to 250 characters).
5. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new team.

OPTIONAL INSTRUCTIONS:

6. Select an employee from the **Manager** drop-down list. Assigning a manager to a team permits that person to manage and report on the team. The employee selected as manager must have a security level of Group Leader or above to view and report on this team. The list of employees displayed in the Manager drop-down list may be limited by your security setting. If required, select an alternate **As of** date. The As of date is used for information purposes only.
7. Enter a **Description** for the team (up to 250 characters).

8. Check the **Hide** box if you want to hide this team from the list of available teams when generating reports.
9. Check the **Flag for archive** box if you want to remove this team from the database the next time the Archive Database function is run.
10. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new team.

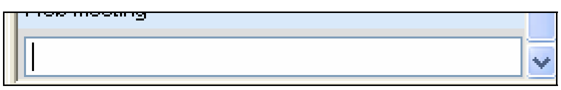
Note: An employee can only be assigned to one team, but may be switched at any time.

Tips:

- You can add a new team by right clicking in the team list pane.
- Additional tabs are available at the bottom of the team properties window to add **Notes**, **Phone Numbers** and **Addresses**.
- You can add fields to track extra team information by using **Custom fields**.

OPTION B: To quickly add a team:

1. Click the **Project Assignments** tab located in the Project Workspace view.
2. Locate the Teams list pane (middle right) and verify that the **Teams tab** is selected.
3. Click the **New** button in the team pane toolbar.
4. At the very bottom of the team list, an **edit box** is displayed. Enter a **unique name** for the team (up to 250 characters).



5. Press **ENTER** or click elsewhere to save the new team.

Note: Using this option (quick add) to add a team does not force the user to enter information in required custom fields.

To add a team using the Items List view:

1. Click the **Items List** tab located in the Project Workspace view.
2. Select **Teams** in the drop-down list at the upper left corner of the view.
3. Click the **New** button located in the toolbar.
4. A **team properties** window opens. Enter team information as described in Option A (page 46).
5. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new team.

Note: The number of teams displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional pages.

Tips:

- To view or edit details for more than one team, open a team properties window and use the **Next Record** button (or Previous) to browse to other teams. Clicking the Next (or Previous) button automatically saves any changes made.
- Use the **Show/Hide** column function to personalize what information is displayed in the team list view's grid.
- **Double click** an item in the grid to see that item's properties.

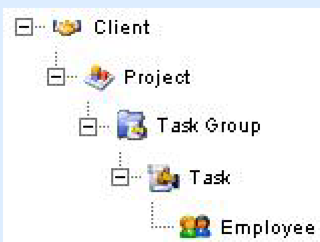
Assignments

In DOVICO Timesheet, **Assignments** are the unique links between projects, tasks, and employees that define how a project is organized for time entry. Assignments must be created before employees can begin tracking their time.

The **Project Assignments** view is where assignments are created and managed. Assignments made in this view appear in DOVICO Timesheet's time and expense entry views with each employee only seeing the specific projects and tasks that have been assigned to them. The Project Assignments view graphically displays assignments on the left pane and displays all available tasks, employees (teams) and task groups within the 3 panes on the right.

How assignments are displayed in the Project Assignments view:

The Assignment tree (left pane) displays a **hierarchical representation** of the assignments by:



1. **Clients** (optional)
2. **Projects**
3. **Task Groups** (optional)
4. **Tasks**
5. **Employees**

- Items within each level are **arranged alphabetically**.
- Clicking on the + (or -) symbol next to an item will **expand** (or **collapse**) that item.
- Projects without a designated client appear near the bottom of the assignment tree (after the last client).

The following details (1) how to **assign tasks** (or task groups) to projects, (2) how to **assign employees** (or teams) to tasks and (3) how to **remove assignments**. To create a large number of assignments, you should consider using the Quick Assign view (page 60).

Important Tips:

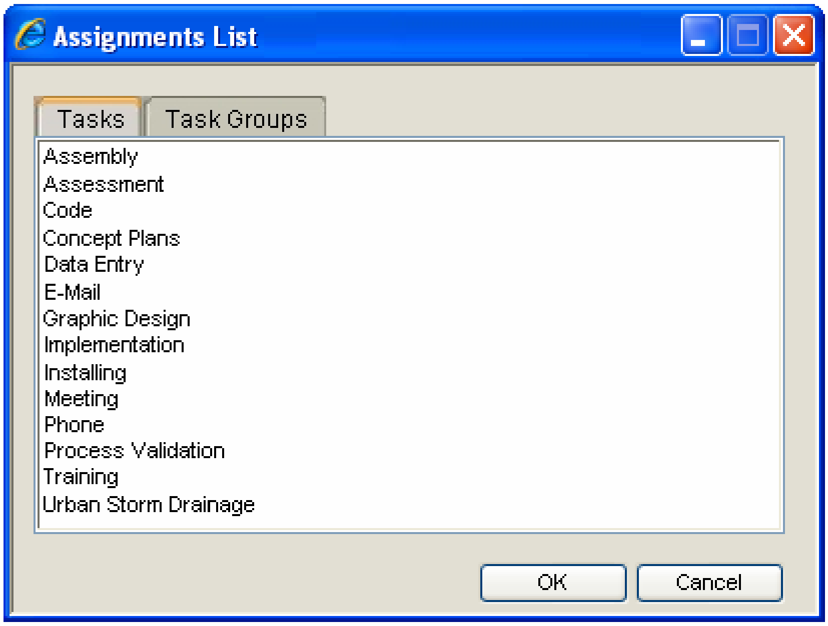
- Before creating or editing any assignments, check the various toolbars to see if any filters are currently applied in the assignment tree or in any of the panes at the right (employees, tasks, etc). Although filters can be very useful when making or editing assignments, they can also cause confusion if you do not remember or recognize that they have been applied.
- See **Tips** at the end of these instructions for time saving information on using the Project Assignments view.

The Project Assignments view is accessed by clicking the **Project Workspace** button in the Projects section of the side navigation bar and then clicking the **Project Assignments tab** at the top of the screen.

To assign tasks to projects:

1. In the assignment tree, locate and select the **project** to which you want to assign tasks.

2. Click the **Assign** button located on the toolbar. The **Assignments List** window opens.



3. Click the **Tasks tab** at the top of the Assignments List window.
4. Select one or more **tasks** to assign to this project and click **OK**. To select more than one item, hold the **Ctrl** key while making your selections.

To assign employees to tasks:

1. Locate and select the **task** in the assignment tree.
2. Click the **Assign** button located on the toolbar.
3. Click the **Employees tab** at the top of the Assignments List window.
4. Select one or more **employees** to assign to this task and click **OK**. To select more than one item, hold the **Ctrl** key while making your selections.

To assign task groups to projects:

You can assign one task at a time, or easily assign multiple tasks at once by using **Task Groups**.

Note: To automatically assign tasks when assigning task groups, verify that this option is enabled in the **Options** view (page 150).

1. Locate and select the **project** in the assignment tree.
2. Click the **Assign** button located on the toolbar.
3. Click the **Task Groups tab** at the top of the Assignments List window.
4. Select one or more **tasks groups** to assign to this project and click **OK**.

To assign teams to tasks:

You can assign one employee at a time, or easily assign multiple employees at once by using **Teams**. Unlike when assigning by task group, the team level is not displayed in the assignment tree. The individual team members are displayed directly under the task.

1. Locate and select the **task** in the assignment tree.
2. Click the **Assign** button located on the toolbar.
3. Click the **Teams tab** at the top of the Assignments List window.
4. Select one or more **teams** to assign to this task and click **OK**.

To remove assignments:

Warning: When an assignment is removed, timesheet entries made for the project are not deleted but any estimate/budget information associated with the assignment is removed. This means that data (reports) showing budgeted vs. actual information will no longer show the estimate/budget for the removed assignments. An alternative to removing assignments is to hide them (page 53).

1. Select the **item** (project, task, employee or task group) from which all assignments are to be removed.
   - Selecting an **employee** will remove the employee assignment from the task.
   - Selecting a **task** will remove the task assignment and all employees assigned to the task.
   - Selecting a **task group** will remove the task group and all task and employee assignments belonging to the task group.
   - Selecting a **project** will remove all task group, task and employee assignments belonging to the project.
2. Click the **Remove Assignments** button.

Notes:

- Projects linked to Microsoft Project or Microsoft Project Server are displayed in the Project Assignments view with an .mpp (or .published) extension appended to the project name. Changes to assignments and estimate information for these projects can only be accomplished using Microsoft Project.
- Tasks automatically assigned using **Global Tasks** are not displayed in the Project Assignments view.
- When a task is added to a task group assignment using either the assign button or using drag and drop (see below), the task is not actually associated to the task group when reporting is done at the task group level. That is, if a task is added to a task group using these methods, any time entered against this task assignment will not appear in reports showing information at the task group level. For task time entries to appear in Task Group reports, the task - task group association must be done from the **task's properties** window.

Tip for Internet Explorer version 6.0 and above:

If using **Internet Explorer**, you can create assignments by **dragging and dropping** items from the task, employee and task groups panes (on the right) directly into the assignment tree.

Example: To assign tasks to a project, select one or more tasks from the task pane on the right side of the screen and drag them on top of a project in the assignment tree. Employees (and teams) can also be assigned to tasks using drag and drop.

You can only drag and drop items into their suitable hierarchy levels. For example, you can drag employees onto tasks, but you will receive an error message if you drag employees over projects, clients or task groups.

Tips:

- Many of the toolbar functions described are also available by using your mouse's **right click** button.
- To make a large number of assignments, it may be easier to use the **Quick Assign** view.
- Use Filtering to limit the amount of data displayed in the assignment tree.
- Use Show/Hide Assignments to hide a task from an employee's time entry view (page 53).
- Use the Copy function to make a copy of an existing project or task assignment structure (page 54).
- Use the Assignment Copy function to copy an employee's assignments to one or more other employees (page 57).

Automatically assign using Global Tasks

This option is useful for companies that usually do not make specific assignments of projects and tasks to employees (i.e. mostly assign all tasks to all employees). When you create a new project, and no specific assignments are made to the project, all tasks designated as global are assigned to all employees for the project.

Using this option, when a new project is created, global tasks are automatically assigned for all employees.

To set a task to global:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Select the **task** from the task pane list on the right side of the view.
3. Click the **Properties** button on the task list toolbar.
4. Check the **Global** box if you want the selected task to be assigned to all new projects when no assignments are made. In other words, global tasks are only active when no other tasks have been manually assigned to the project.

Tip: You can automatically set all newly created tasks to global by using the **new tasks default to global** option in the Database Options view.

Advanced assignment functionality

Adjust Assignment Properties

Use the **Assignment Properties** function to edit the specific properties of a task/employee assignment. The Assignment Properties are mainly used to calculate the estimated client costs for a task/employee assignment.

Estimate Client Cost = [(Estimated hours + Adjustment hours) x Task prorating x Rate Charged]

Tip: The Assignment Properties function is useful when editing estimate information on just a few assignments. To make changes to many assignments, it's best to use the Budgeted Time & Costs view's Budget Wizard.

Available assignment properties:

- **Estimated Hours**: The estimated hours to complete a specific task/employee assignment. Estimated hours can only be added or edited when the **project status** is set to Estimate.
- **Adjustment**: Adjustments to the estimated hours to complete a specific task/employee assignment. Adjustments can only be added when the **project status** is set to Active.
- **Prorating**: The budgeted prorating for this specific task/employee assignment. The initial prorating value is taken from the value assigned in this task's prorating field. Editing this value only affects this specific task/employee assignment. It does not alter the default prorating assigned to this task nor does it affect the prorating value where this task is assigned to other projects.
- **Rate Charged**: The budgeted Rate Charged for this specific task/employee assignment. The initial Rate Charged value is taken from the value assigned in this employee's Rate Charged field. Editing this value only affects the Rate Charged for this specific task/employee assignment. It does not alter the default Rate Charged assigned to this employee nor does it affect the Rate Charged where this employee is assigned to other tasks.
- **Billable by Default**: The Billable by Default status determines if this assignment is displayed in the employee's time entry view with the Billable option already checked or not. For example, if 'Billable by default' is checked, when this employee enters time against this assignment, the billable option is already checked. The initial Billable by Default status is taken from this project's Billable by Default field.

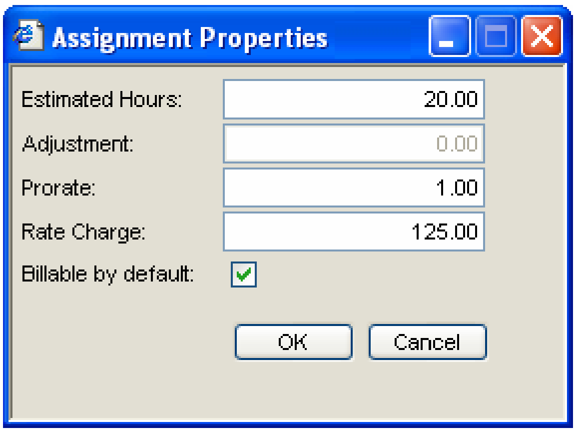
To edit assignment properties:

1. Go to the **Project Workspace** area and click the **Project Assignments** tab. The Project Workspace button is in the Projects section of the side navigation bar.
2. Locate and select the **employee assignment** in the assignment tree.

3. Click the **Properties** button located on the top toolbar to display the **Assignment Properties** window (or right click on the employee and select Properties).
4. Enter or edit information in any of the available fields:
   - Estimated Hours (available if the project status is set to estimate)
   - Adjustment (available if the project status is set to active)

- Prorating
- Rate Charged (only available to users with appropriate security rights)
- Billable by Default

5. Click **OK** when finished.



Show / Hide Assignments

Use the **Show / Hide Assignments** option in the Project Assignments view to hide a particular task assignment from an employee. When a task assignment is hidden, the employee cannot enter time against that task. Hiding a task assignment has no effect on previously recorded time against that task.

To hide a task assignment from an employee:

1. Go to the **Project Workspace** area and click the **Project Assignments** tab. The Project Workspace button is in the Projects section of the side navigation bar.
2. In the assignment tree, locate the task/employee assignment to hide and click on the employee.

3. Click the **Show / Hide Assignments** button located on the toolbar.

   When hidden, the employee image is now shown as faded.

To show a hidden task assignment for an employee:

1. Locate and select the hidden employee assignment. The employee icon appears faded when the assignment is hidden.
2. Click the **Show / Hide Assignments** button located on the toolbar.

Note: For the employee, the task will be hidden/shown in the time entry view the next time the time entry screen is refreshed or when the application is restarted.

Tip: The Show/Hide Assignment function is available by using your mouse's **right click** button.

Copy - Project, Task Assignments

From the Project Assignments view, you can make an exact duplicate of assignment structures by project, task group, task or employee. When a copy is made, all sub-level properties of the item are also copied. For example, when a project is copied, all task groups, tasks and employees assigned to the project (and their **assignment properties**) are also copied.

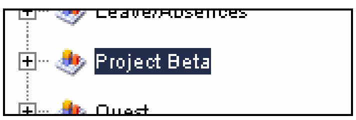
The copy/paste function is beneficial when you want to use any **project templates** you may have created.

The following describes how to copy and paste an item and its assignments within the assignment tree. Clients cannot be copied using this method.

The Project Assignment view is accessed by clicking the **Project Workspace** button in the Projects section of the side navigation bar and then clicking the **Project Assignments tab**.

To copy a project and its task/employee assignments:

1. From the Project Assignments view, locate and select the **project** to be copied.



2. Click the **Copy** button located on the toolbar.
3. If the pasted project will be associated with a client, locate and click the client name.
   or
   If there is no associated client, click the root assignment level icon at the top of the assignment tree.
4. Click the **Paste** button.
5. Locate the copied project "Copy (1) of project name" and edit the project name, and any other relevant information. If copying a project template, check that the **project status** is properly set.

To copy a task group and its task/employee assignments:

1. From the Project Assignments view, locate and select the **task group** to be copied.
2. Click the **Copy** button located on the toolbar.
3. Locate the **project** (or **task group**) where the task group will be pasted.
4. Click the **Paste** button.
5. Edit the task group's assignments as required.

To copy a task and its employee assignments:

1. From the Project Assignments view, locate and select the **task** to be copied from the assignment tree.
2. Click the **Copy** button located on the toolbar.
3. Locate the **project** (or **task group**) where the task will be pasted.
4. Click the **Paste** button.
5. Edit the task assignments as required.

To copy an employee assignment and its properties:

1. From the Project Assignments view, locate and select the **employee assignment** to be copied from the assignment tree.
2. Click the **Copy** button located on the toolbar.
3. Locate and click on the **task** where the employee assignment will be pasted.
4. Click the **Paste** button.
5. Edit the employee assignment properties as required.

Note: The Copy/Paste function will not duplicate any existing assignments within a given project. That is, if a task is already assigned to a project, pasting a duplicate of that task will not be permitted.

Tip: The Copy/Paste function is also available using your mouse's right click button.

Assignments Filter

The Project Assignments view's **Assignments filter** is a powerful feature permitting a user to reduce the amount of information displayed in the assignments pane. Filters can be **temporary** or can be **saved** for later use.

The assignments filter contains numerous fields from which you can select one or more items (filter by task, employee, project, etc). You can also filter by assignment date range or by project status.

The following describes how to (1) create temporary assignment filters, how to (2) save assignment filters, how to (3) remove assignment filters and how to (4) apply/delete saved assignment filters.

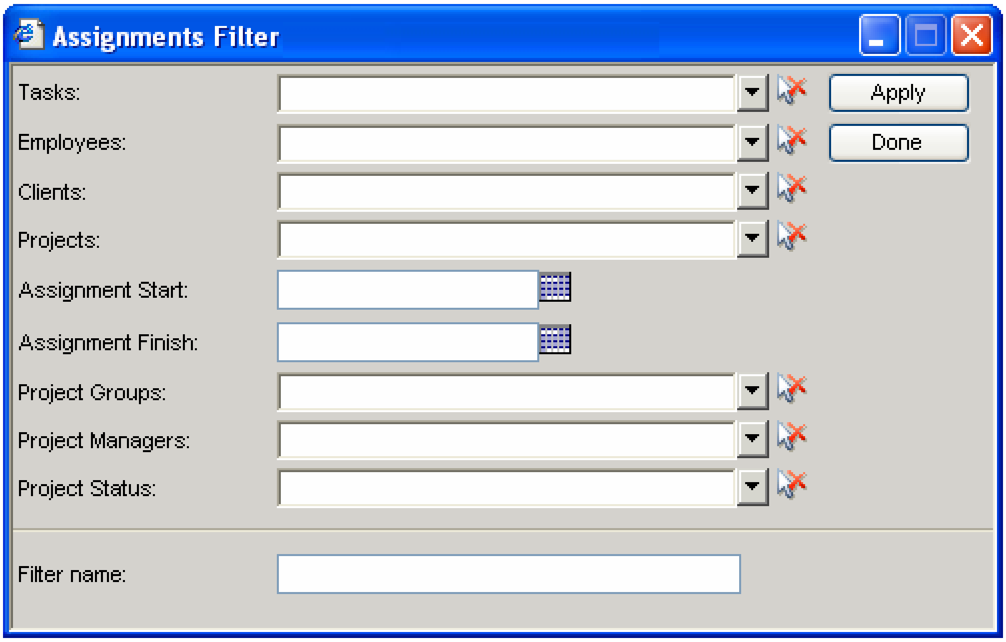
Notes:

- When a filter is applied, the remove filter button is enabled in the toolbar.
- Filters created in this view are personal and are not available to other users.

To create an assignment filter:

1. Go to the **Project Workspace** area and click the **Project Assignments** tab. The Project Workspace button is in the Projects section of the side navigation bar.
2. Click the **Assignments Filter** button located on the top toolbar to display the Assignments Filter window.
3. Select items from one or more drop-down list and/or select assignment dates .

   When you have selected your items within a drop-down list, collapse the drop-down list by clicking the button or click elsewhere on the Assignments Filter window.



4. To use this filter temporarily, click **Apply** to set the filter criteria and leave the window open, or click **Done** to set the filter and close the window.
5. To **Save** the filter for later use, enter a unique **Filter name** and click **Apply** (or **Done**). The saved filter is displayed in the toolbar's saved filter drop-down list.

Notes:

- When criteria is selected in more than one field (tasks, employees, etc), the filter returns only the data that matches all the selected criteria (an AND operation).
- When more than 1 item is selected within a drop-down list, the filter returns the data that matches any one of the selected items (an OR operation) Example: If both Meeting and Testing are selected in the Task drop-down list, all assignments for Meeting and all assignment for Testing will be displayed in the assignment tree.
- In the Task and Employee drop-down lists, only the tasks and employees that are currently assigned are displayed.

Tips:

- You can always **modify** an applied filter (temporary or saved) by clicking the Assignment Filter button and adjusting one or more of its criteria.
- To clear all selected items from a drop-down list, click the **clear selections** button next to the drop-down list.
- To select adjacent items within a list, click the first item, and then hold down **Shift** and click the last item.
- To select non-adjacent items, click the first item, and then hold down **Ctrl** and click additional items.

To remove a temporary or saved filter:

1. Click the **Remove Filter** button located on the toolbar.

Warning: When a saved filter is applied, pressing the Delete Filter button instead of the Remove Filter button will permanently delete a saved filter.

To apply a saved filter:

1. Select the filter from the saved filters drop-down list located in the toolbar.

To delete a saved filter:

1. Select the saved filter from the drop-down list on the toolbar.
2. Click the **Delete Filter** button located to the right of the drop-down list.

Copy an Employee's Assignments

The **Copy Employee's Assignments** function is a powerful tool permitting all assignments for a given employee to be copied onto one or more other employees. The feature is particularly useful when assignments are based on teams and a new employee joins the team or switches teams. It is also useful when assignments are primarily based on job descriptions and a new employee joins the company.

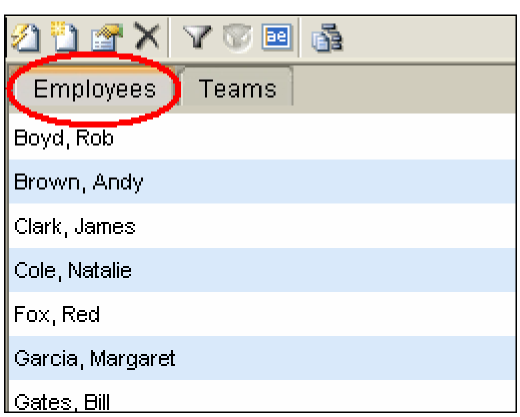
Notes:

- This feature works by first selecting the employee(s) who will receive the new assignments and then selecting the employee from which the assignments are copied.
- Existing assignments to the employees receiving the new assignments are not lost.

The Project Assignments view is accessed by clicking the **Project Workspace** button in the Projects section of the side navigation bar and then clicking the **Project Assignments tab**.

To copy one employee's assignments to other employees:

1. In the Employees list pane, select one or more **employees** who will receive the new assignments. Press the CTRL key to select more than one employee.



2. Click the **Copy Assignments** button located on the toolbar.
3. In the Copy Assignments window, select the employee from which the assignments will be copied.
4. (**Optional**) Check the **Copy estimate information** checkbox to also copy this employee's estimated hours, task proratings, assignment Start and Finish dates and Billable by Default selection.
5. Click **OK** to copy the assignments from this employee to the employee(s) selected in step 1.

Only Display Scheduled Assignments

The Only Display Scheduled Assignments feature permits a manager or system administrator to hide a project's task assignments from time entry users when the date is outside the task assignment's scheduled Start and Finish dates.

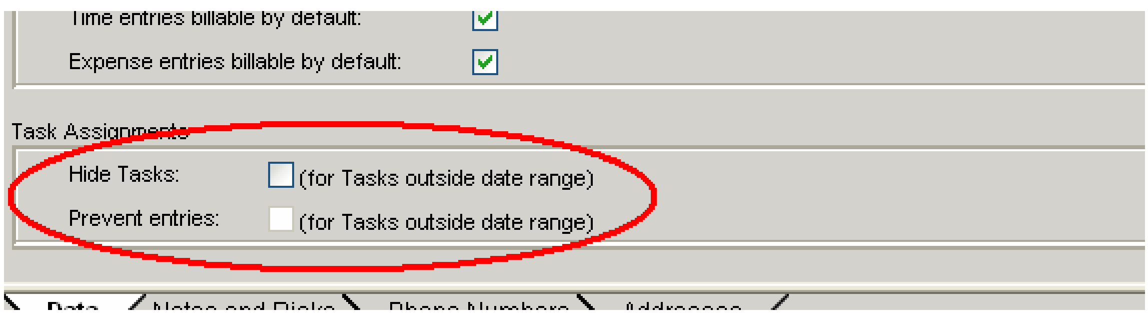
This is useful when a manager wants to temporarily remove an assignment for an employee without removing any budgetary information associated with that Project/Task/Employee.

Prerequisite:

- Task assignments must have been assigned date ranges (Start and Finish) using the **Budgeted Time & Costs** view.

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Locate and click on the **project** for which only scheduled assignments will be shown to time entry users.
3. Click the **Properties** button  on the toolbar.

Locate the **Task Assignments** area for the project:



To only show users their scheduled assignments:

Hide Tasks: Check this option to simply reduce the list of available tasks displayed in the time entry's assignment tree to only those tasks scheduled to be worked on during the displayed week. When using the **Hide Tasks** option, tasks are simply "out-of-sight". If required, employees can still track time against these hidden tasks by using the time entry's **Show All** function.

Example:

A task/employee assignment has a Start date of Monday, March 27 and a Finish date of Wednesday, April 12. With the Hide Tasks option checked, the assignment will not be displayed in the time entry's assignment tree when the week displayed is not between March 27th and April 12th.

Week displayed in the time entry grid	Task displayed in assignment tree	Available for time entry
Sunday, March 19 to Saturday, March 25	No	Yes, using Show All
Sunday, March 26 to Saturday, April 1	Yes	Yes
Sunday, April 2 to Saturday, April 8	Yes	Yes
Sunday, April 9 to Saturday, April 15	Yes	Yes
Sunday, April 16 to Saturday, April 22	No	Yes, using Show All

To prevent time entry outside a task's start and finish dates:

Prerequisite: The Hide Tasks checkbox must be selected.

Prevent Entries: Check this option to completely prevent time entry users from tracking time against tasks when the tasks are not scheduled to be worked on. When the **Prevent Entries** box is checked, tasks not scheduled for work, during the displayed week, are not displayed in the time entry's assignment tree. Tasks scheduled for work during only a portion of the week are displayed in the assignment tree but are only available for time entry on those days that fall within the task assignment's date range.

Example (same as above):

A task/employee assignment has a Start date of Monday, March 27 and a Finish date of Wednesday, April 12. With the Prevent Entries option checked, the assignment will not be displayed in the time entry's assignment tree when the week displayed is not between March 27th and April 12th and will not be available for time entry prior to March 27 or after April 12.

Week displayed in the time entry grid	Task displayed in assignment tree	Available for time entry
Sunday, March 19 to Saturday, March 25	No	No
Sunday, March 26 to Saturday, April 1	Yes	Yes, between March 27 to April 1
Sunday, April 2 to Saturday, April 8	Yes	Yes
Sunday, April 9 to Saturday, April 15	Yes	Yes, between April 9 to 12
Sunday, April 16 to Saturday, April 22	No	No

Quick Assign

In DOVICO Timesheet, assignments are the unique links between projects, tasks, and employees that define how a project is organized for time entry. Assignments establish who works on what and are required before employees can begin to track their time on projects and tasks.

The **Quick Assign** view is used to quickly assign tasks to projects, and to assign employees to tasks.

To view the assignments in a graphical format, click the **Project Assignment** tab located in the Project Workspace view.

Warning: Assign/Unassign operations performed using Quick Assign may slow down the server for the length of the operation. If you plan on performing a large assign/unassign workload, it may be beneficial to do this during off-hours.

To create assignments using Quick Assign:

1. Click **Quick Assign** button  located in the Projects section of the side navigation bar.
2. Select one or more **projects** from the list.
3. Select either **Tasks** (or **Task Groups**) from the drop-down list and select the items to assign to the selected project(s).
4. Select the **Employees** (or **Teams**) from the drop-down list and select the items to assign to the selected tasks (or task groups).
5. Click **Assign**.

Tip: Hold the **Ctrl** key to make multiple selections in any Quick Assign list box.

To remove assignments using Quick Assign:

Notes:

- Removing assignments will delete estimate information but will not delete timesheet entries.
- Before removing assignments, all time and expense entries for the project(s) should be submitted.
- When assignments are removed using the Quick Assign view, only the lowest level assignments are removed. That is, if projects, tasks and employees are selected for unassign, only the employees will be unassigned. To unassign tasks, only projects and tasks should be selected from the lists.

1. Select one or more **projects** from the list.
2. Select the **tasks** or **task groups** to unassign from the list.
3. Select the **employees** or **teams** to unassign from the list.
4. Click **Unassign**.

Project Groups

Project Groups are useful when you have closely related projects that can be combined or grouped into logical categories. Project groups are useful to report on time and costs spent on similar type projects or work efforts.

For example, if you have "client support" projects for each of your company's products, create a project group called "Product Support" and assign each individual "client support" project to this project group. That way you will be able to report on individual projects as well as be able to report on the total time and costs associated with supporting all your company's products.

The project groups created in this view are displayed in the **Projects** view as an optional selection. As a result, any project can be associated to a project group.

Prerequisite:

- **Employees** should first be established to be able to designate a manager for a project group.

To add a new project group:

1. Click the **Project Groups** button located in the Projects section of the side navigation bar.
2. Click the **New** button.
3. Enter a unique project group **name** (up to 100 characters).
4. Click **Save** .

OPTIONAL INSTRUCTIONS:

5. Select an employee from the **Manager** drop-down list. Assigning a manager to a project group permits that person to manage and report on that group. The employee selected as manager must have a security level of Group leader or above to view and report on this project group. The list of employees displayed in the Manager drop-down list may be limited by your security setting. If required, select an alternate **As of date**.
6. Enter a **Description** for the project group (up to 250 characters).
7. Check the **Hide** box if you want to hide this project group from lists when generating reports.
8. Check the **Flag for archive** box if you want to remove this project group from the database the next time the Archive Database function is run.
9. Click **Save** .

Note: The number of project groups displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Approvals

Several functions are available to create and manage time and expense approval workflows by employee or by project. **Approvals** establish which manager(s) must approve an employee's time or expense submissions.

By default, DOVICO Timesheet approval workflows are not assigned to employees nor to projects. Therefore, unless approval workflows are created and assigned, time or expenses submitted by employees are immediately available for reporting, costing, payroll, billing, etc.

The following explains how to setup approval workflows, how to review and approve time and expenses, and how to edit or reject time entries once they have been approved.

In Approvals …

Workflows

Workflows establish which manager(s) must approve an employee's time or expense submissions before those entries can be processed for project costs, billing, payroll, reports, etc. When multiple approvals are required for the same submission (e.g., first the Project Manager and then the HR Manager), the workflow also controls which manager approves first, second, and so on.

A workflow is first created in the Workflow view and then assigned to individual employees. When the employee submits a time or expense entry, the designated manager then approves the time and expenses using the **Time & Expense approval** view. When signing on, an approving manager is notified when submitted entries are awaiting approval.

The workflow view uses independent approval workflows for time entries and for expense entries. This, for example, permits an Accounting Manager to approve an expense without having to approve that employee's time.

Note: Time and Expense entries associated with **Project Approvals** will bypass these workflow processes.

Prerequisite:

- The **employees** (managers) designated to approve time and expenses should first be established.

To add a workflow:

1. Click the **Workflow** button located in the Advanced section of the side navigation bar.
2. Click the **New** button on the toolbar.
3. Enter a unique workflow **name** (up to 100 characters).
4. Select the **approval type** (i.e. Timesheet or Expense). Note that the approval type cannot be modified after the workflow is created.
5. From the list of **Managers available**, select and transfer the managers that need to approve the time or expense entries to the Approval order list. The Managers available list includes all employees with access to administrative views (assigned to "All" in the **employee properties** Software access field). To approve time and expenses, employees listed as a manager must also have a **security level** giving them access to the Time & Expense Approval view.
6. The order of the managers displayed in the **Approval order** list represents the approving order. The first manager shown will need to approve the time or expenses before the second manager listed (if any) can approved the time or expenses, and so on. To change the order of an approving manager, select the manager and click the up or down arrow buttons.
7. (**Optional**) Enter a **description** (up to 250 characters).
8. (**Optional**) Check the **Flag for archive** box if you want to remove this workflow from the database the next time the Archive Database function is run.
9. Click **Save**.

Once a workflow is created, use the **Additional tab** in the employee properties window to assign it to an employee.

Note: The number of workflows displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Tip: To quickly assign a workflow to multiple employees, use the **Update Employee Properties** view.

Project Approvals

Project Approval is a mechanism allowing a manager or system administrator to create approval workflows that are **project specific**. A project approval workflow establishes which manager(s) must approve an employee's project specific time or expense submissions before those entries can be processed for project costs, billing, reports, etc.

Time and expense entries for the specified projects are routed directly to those managers established in the project approval workflow. Submitted time and expense entries that are not associated to a project approval workflow continue to be directed through any standard **workflow** process established for the employee.

The following describes how to (1) create and (2) edit a **Project Approval workflow** and how to (3) create and (4) edit a **Project Approval template**.

Note: Time and Expense entries associated with Project Approvals bypass all other established **Workflows**.

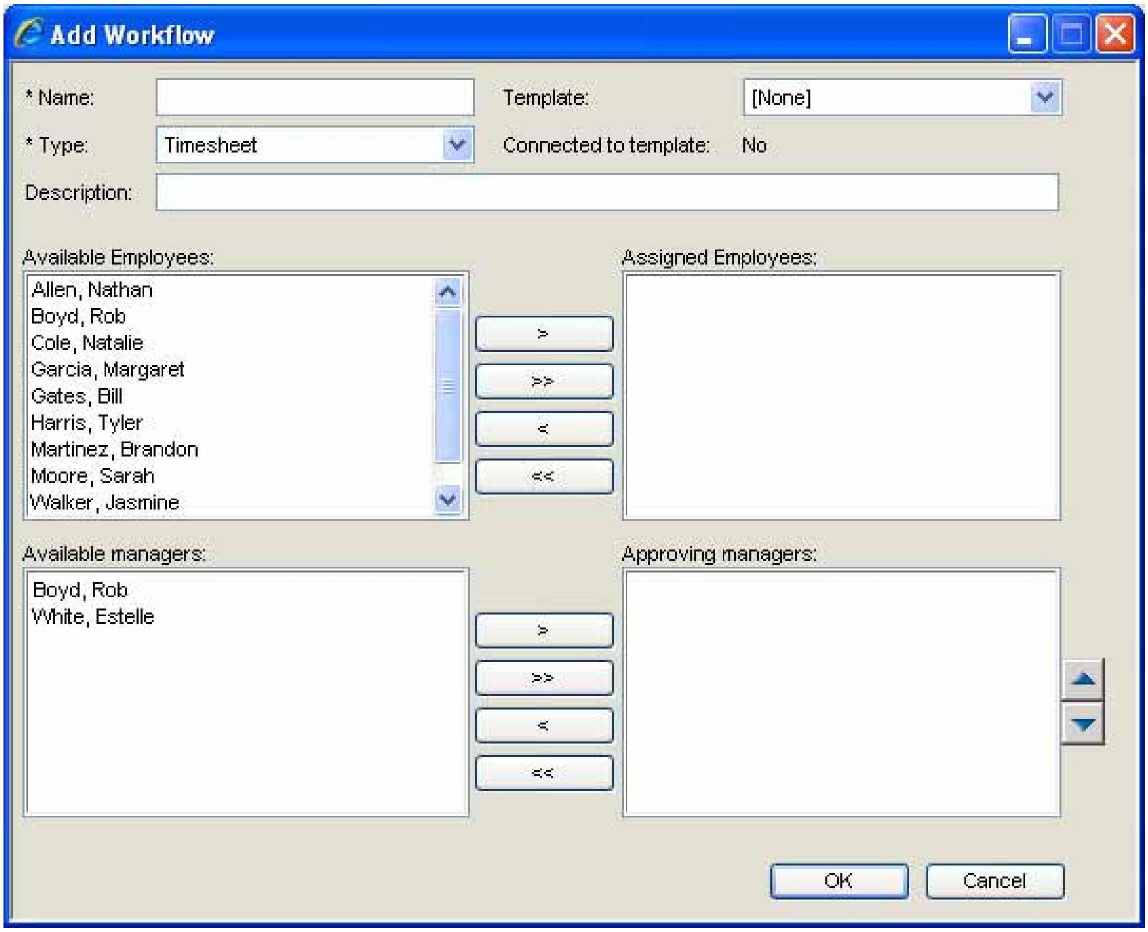
Prerequisites:

- The **project**(s) and its **employee assignments** should first be created.
- The **employees** (managers) designated to approve time and expenses should first be created.

To create a project approval workflow:

1. The Project Approval view is accessed by clicking the **Project Workspace**  button in the Projects section of the side navigation bar and then clicking the **Project Approvals tab** at the top of the screen.
2. Using the Project drop-down list at the top of the screen, select the **project** for which the approval workflow will be created.
3. Click the **Approval Workflow** tab.

4. Click the **New** button to launch the Add Workflow pop-up window.



5. Enter a unique **name** for this project's approval workflow (up to 100 characters). It's a good idea to also include the project name in this field or in the description field (step 8).
6. Select the **type** of workflow (Timesheet or Expense) from the drop-down list.
7. (**Optional**) Select a **template** from the drop-down list. If the exact same list of employees and managers is going to be used for multiple projects, then it's a good idea to first create an approval template or use an existing one. When the **Connect to Template** box displays YES, any future changes made to the template can be transferred to the workflows created from it. Go to page 66 to learn how to create an approval template.
8. (**Optional**) Enter a **description** for this project's approval workflow (up to 250 characters).
9. From the list of **Available Employees**, select and transfer employees to the **Assigned Employees** list using the Assign button  (use the Assign All button  to transfer all available employees to the Assigned list).

Notes:

- The Available Employees list displays all employees that are assigned to this project, **and** that are not already assigned to another workflow for this same project.
- Employees can only be assigned to one Timesheet workflow and one Expense workflow per project.

10. From the list of **Available Managers**, select and transfer the managers that need to approve the time or expense entries to the Approving Managers list. The Available Managers list includes all employees with access to administrative functions (assigned to "All" in the **employee properties**

Software access field). To approve time and expenses, employees listed as a manager must also have a **security level** giving them access to the Time & Expense approval view.

11. The order of the managers displayed in the **Approving Managers** list represents the approving order. The first manager shown will need to approve the time or expenses before the second manager listed (if any) can approved the time or expenses, and so on. To change the order of an approving manager, select the manager and click the up or down arrow buttons.
12. Click **OK**.

To edit a project approval workflow:

1. Select the Project Approval Workflow.
2. Click the **Edit** button.
3. Make changes as required.

   Warning: If the workflow **Type** is changed (from Timesheet to Expense or vice-versa), all workflow assignments and template links are lost.

4. Click **OK**.

Project Approval Templates

Project Approval Templates are primarily used to reduce the work involved in creating a new project approval workflow and to carry out widespread changes more efficiently. By using an approval template as a foundation, you can quickly create a new project approval workflow and link that workflow to its originating template. Then any future changes made to the template can be transferred to the workflows.

A project approval template is most useful when the same list of employees and managers is going to be used for multiple projects.

To create a project approval template:

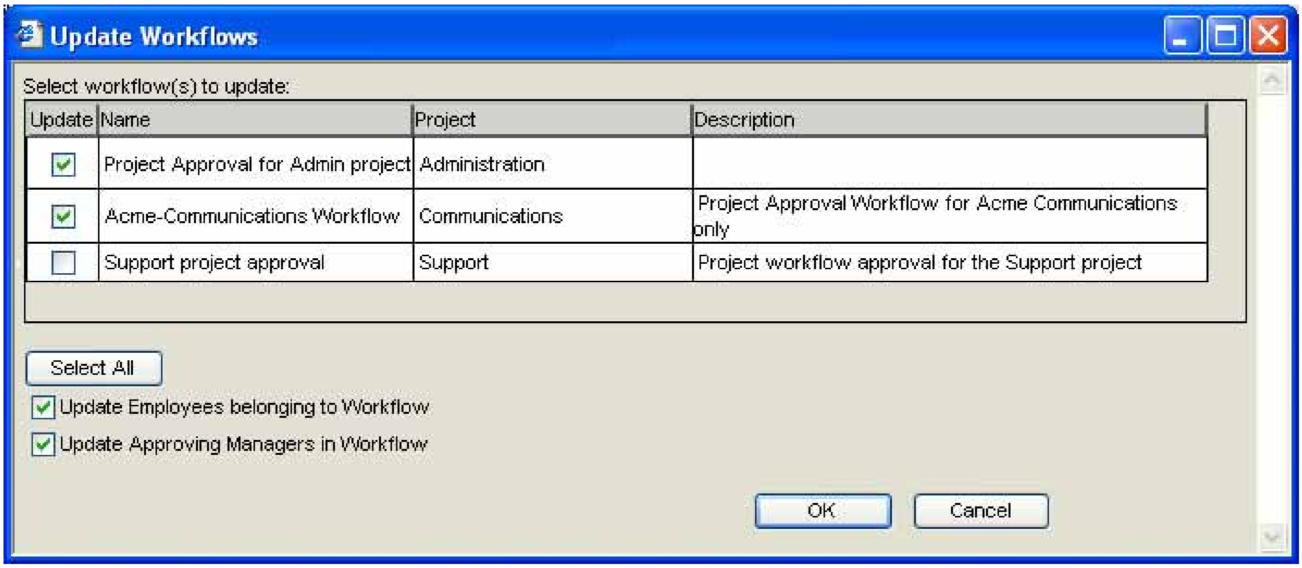
1. Select the **Approval Template** tab. All existing approval templates are displayed.
2. Click the **New** button to launch the Add Template pop-up window.
3. Enter a unique **name** for this Approval Template (up to 100 characters).
4. Select the **type** of workflow (Timesheet or Expense) from the drop-down list.
5. (**Optional**) Un-check the **Public** box to make this template available only to you. When checked, the template is available to all users with access to the Project Approvals tab.
6. (**Optional**) Enter a **description** for the Approval Template (up to 250 characters).
7. From the list of **Available Employees**, select and transfer employees to the **Assigned Employees** list using the Assign button .

   Note: Please note that approval templates are not project specific (unlike project approval workflows). Therefore, the Available Employees for an approval template includes **all employees**.

8. From the list of **Available Managers**, select and transfer the managers that need to approve the time or expense entries to the Assigned Managers list. Use the Up and Down arrow buttons to adjust the approval order for a manager. The Approving Managers list includes all employees with access to administrative functions (assigned to "All" in the **employee properties** Software access field). To approve time and expenses, employees listed as a manager must also have a **security level** giving them access to the Time & Expense approval view.
9. Click **OK**.

To edit a project approval template:

1. Select the Project Approval Template.
2. Click the **Edit** button.
3. Make changes as required.
4. Click **OK**.



Notes:

- The **Update Workflows** screen displays all the workflows that are linked to this template. This is the opportunity to transfer the template changes to any or all linked workflows.
- The user can only update those approval workflows to which they have access. When unavailable, an asterisk is placed next to the workflow name.

5. In front of each listed workflow is an Update checkbox. Check the workflows to update.
6. Check the **Update Employees** and **Update Managers** boxes as required.
7. Press **OK** to complete the update.

Time & Expense Approval

The **Time & Expense Approval** view is the location used to review and approve employee timesheets or expenses. The following describes how to approve/reject (1) time entries and (2) expenses.

A manager designated to approve time and expenses only sees the timesheets and expenses for which he or she is an approving manager and only sees them when they are next in the approval order.

When signing on, an approving manager is notified when submitted entries are awaiting approval.

Prerequisite:

- Only timesheets and expenses assigned to an employee **approval workflow** or to a **project approval** workflow appear in the Time & Expense Approval view.

To approve / reject timesheet entries:

1. Click the **Time & Expense Approval** button located in the Time & Expenses section of the side navigation bar.
2. Select a **Timesheet** from the Remaining Approval Work drop-down list. The naming convention for submitted timesheets is: `Timesheet for "last name", "first name" from "date range"`.
   - The top portion of the view displays the individual time entries submitted organized by client/project. Submitted time entries are not displayed by task group in this view. A cell with a golden colored background indicates that the time was submitted as overtime.
   - The middle portion of the view displays the details for any individual time entry selected in the top pane. No information is displayed in the middle pane if more than 1 item is selected in the top pane. Overtime Rate details are only available to users with appropriate security rights.
   - The bottom pane displays all previously approved time entries for this same date range plus all time entries submitted but not approved.
3. There are 3 options for approving/rejecting time entries.
   - To **approve all** time entries within a timesheet, click the **Approve** button on the toolbar.
   - To **reject all** time entries within a timesheet, click the **Reject** button on the toolbar.

     Enter a detailed **reason for the rejection**. This reason will be displayed to the employee who submitted the time entry.

   - To **approve some entries and reject others** within a timesheet, select the entries to reject by clicking in the cell (use the Ctrl key to select multiple entries) and click the **Approve by Exception** button on the toolbar.

     Enter a detailed **reason for the rejection** in the pop-up window. This reason will be displayed to the employee who submitted the time entry.

Note: When a task has multiple time entries **on the same day**, a "rolled-up" total for the task is displayed in the top pane. The individual details of each entry can be viewed using the middle pane. However, it is not possible to approve or reject individual entries within the rolled up task.

Tips:

- If a time entry has been approved in error, it can be rejected using the **Time Calendar** view.
- If an expense entry has been approved in error, it can be rejected using the **Actual Expenses** view.
- The bottom pane can be disabled using **Database options – Time & Expense Approval view preferences**.
- Approve and reject options are also available using your mouse's right click button in the top pane.

To approve / reject expense entries:

1. Select an **Expense sheet** from the Remaining Approval Work drop-down list.
   - The top portion of the view displays the expense entries submitted rolled-up by expense category.
   - The middle portion of the view displays the individual expense entry details for the expense category selected in the top pane. No information is displayed in the middle pane if more than 1 item is selected in the top pane.
   - The bottom pane displays, by expense category, the sum of the approved expense entries for this same date range plus all expense entries submitted but not approved.

2. There are 2 options for approving/rejecting expense entries.
   - To **approve all** expense entries within the sheet, click the **Approve** button on the toolbar.
   - To **reject all** expense entries within the sheet, click the **Reject** button on the toolbar.

   Enter a detailed **reason for the rejection** in the pop-up window. This reason will be displayed to the employee who submitted the expense sheet. When an approving manager rejects an expense entry, the entire sheet is rejected. Individual entries are not identified and it is up to the approving manager to enter the appropriate level of details for the rejection.

Note: The default expense sheet naming convention has 2 components:

1 - `Expenses for "last name", "first name" on "Client abbreviation - Project name"`. This component is editable by the employee submitting the expense sheet.

2 - `("last name", "first name" from "date range")`. This component cannot be edited.

Tip: There is a way you can reject individual expenses within a sheet; first approve the entire expense sheet and then go to the **Actual Expenses** view where you can reject the individual expenses.

Approval Override

The **Approval Override** option is available for managers or administrators who may need the ability to force the approval of a time or expense sheet and bypass existing **workflow** and **project approval** processes. For example: this option can be useful if a manager in the approval process is not available to approve their employees' time and expenses.

To override the approval process:

1. Click the **Approval Override** button  located in the Tools section of the side navigation bar.
2. Select the time or expense sheet to approve and click **Approve**.

Note: When Approval Override is used, the time and expense sheets selected bypass all approval paths and managers.

Time Calendar

This month-at-a-glance view enables a manager to quickly review, edit and reject time entries submitted by employees. It also permits a manager to add time entries for other employees.

Notes:

- Time entries not submitted or waiting approval are not displayed in the Time Calendar view.
- When "**Group Leader**" rights are assigned to a manager, that person will only be able to edit the information for his/her group.

The Time Calendar view is accessed by clicking the **Time Calendar** button in the Time & Expenses section of the side navigation bar.

To review an employee's monthly timesheet:

1. Select an **employee** from the drop-down list located at the top right-hand corner of the Time Calendar view.

2. Select the **month** and **year** (located at the top right-hand corner of the view).

The employee calendar is displayed

- Hours shown in blue are regular hours worked
- Hours shown in red are overtime hours worked

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3 Reg: 8.00 hrs	4 Reg: 8.00 hrs	5 Reg: 8.50 hrs	6 Reg: 8.00 hrs	7 Reg: 7.75 hrs	8
9	10 Reg: 7.00 hrs OT: 1.50 hrs	11 Reg: 8.00 hrs	12 Reg: 8.50 hrs	13 Reg: 7.50 hrs	14 Reg: 7.50 hrs	15
16	17 Reg: 7.75 hrs	18 Reg: 8.25 hrs	19 Reg: 8.00 hrs OT: 1.50 hrs	20 Reg: 8.00 hrs	21 Reg: 8.00 hrs	22
23	24 Reg: 7.50 hrs	25 Reg: 8.00 hrs	26 Reg: 8.00 hrs	27	28	29
30	1	2	3	4	5	6

Regular Hours: 142.25 hrs + Overtime Hours: 3.00 hrs = Actual Hours: 145.25 hrs
Average Hours: 8.07 hrs Most hours worked on: Administration

To edit an employee's time entries:

1. Select the **employee** from the drop-down list located at the top right-hand corner of the view.
2. Select the **month** and **year**.
3. Select the day of the month containing the time entries to edit.
4. Click the **View Timesheet** button on the toolbar.
5. Select the time entry row to edit.
6. Edit the time entry information using the bottom part of the window.
7. Click the **Save** button to save changes made.

To reject an employee's time entries:

1. Select the **employee** from the drop-down list.
2. Select the **month** and **year**.
3. Select the day of the month containing the time entry to reject.
4. Click the **View Timesheet** button on the toolbar.
5. Select the row to reject.
6. Click the **Reject** button .
7. Enter the reason for the rejection. This reason is displayed to the employee who submitted the time.

To reject an employee's timesheet entries for an entire day:

1. Select the **employee** from the drop-down list.
2. Select the **month** and **year**.
3. Select 1 or more days by clicking on the calendar day.
4. Click the **Reject** button .
5. Enter the reason for the rejection. This reason is displayed to the employee who submitted the time.

To add time entries for an employee:

Warnings:

- When a time entry is entered from this view for a project or task not assigned to an employee, the entry will not be displayed in any of the reports showing budget information and will not be displayed in the Budgeted Time & Costs view.
- Time entries added using this view bypass all approval processes.

1. Select the **employee** from the drop-down list.
2. Select the **month** and **year**.
3. Select the day of the month and click the **View Timesheet** button on the toolbar.
4. Click the **New** button on the toolbar.
5. Select the **project** from the drop-down list.
6. Select the **task** from the drop-down list.
7. (**Optional**) Select the **overtime rate** (only available to users with appropriate security rights).
8. Check the **billable** box if this time entry is billable.

9. Enter a **duration** (in hours). This is the total time worked.
   or
   Enter the **start** and **end times** for the time entry.
10. (**Optional**) Select the **client overtime rate** (only available to users with appropriate security rights).
11. (**Optional**) Enter a **description** to record additional information.
12. Click the **Save** button .

Reporting

DOVICO Timesheet’s comprehensive reporting tool gives you access to over 95 built-in reports, graphs and charts.

Reports can be generated for any date range by project, task, task group, employee, etc. to help you determine your project’s status, where your costs are being incurred, compare budget vs. actuals, and so on.

With the additional ability to create custom reports, export reports in Word, Excel, RTF and CSV, schedule any report to be automatically run and e-mailed, DOVICO Timesheet’s **Reports Explorer** includes all the functionality required to suit your complexity and requirements.

In Reporting …

Reports Explorer

Use the **Reports Explorer** view to display or print any one of numerous time, expense or costs reports. For a preview of each built-in report available in DOVICO Timesheet, search for **Available Reports** in the help system**.**

The following describes how to view a report. For details on the **advanced reporting functions** such as importing, modifying or exporting reports, applying report security, etc., see **Reports Explorer – Advanced** (page 77).

To view a report:

1. Click the **Reports Explorer** button Reports Explorer at the top of the side navigation bar.
2. Locate the report that you would like to view.
3. Double click the report name, or select the report name and click the preview button on the toolbar.
4. Follow the step-by-step instructions to guide you through the report parameters and click **Finish** to preview the report. An Adobe PDF formatted report is generated in a new window. To print or save the report, click the appropriate button on your PDF viewer's toolbar. See the next page to review the list of possible parameters which may be displayed in the step-by-step instructions.

The previewed report can be exported in either **Word**, **Excel**, **RTF** and **CSV** formats by selecting the appropriate **report format** from the drop-down list at the top of the window and then clicking the **Export** button.

Cost, rate and overtime details are only displayed to users with appropriate security rights. For those users with access to cost information, options to **show / hide cost information** are available at the top of the PDF viewer. These options are made available for those occasions where the report may need to be distributed to other individuals or in the case where the report is scheduled to be automatically generated and e-mailed to other individuals (via the Job Scheduler).

Notes:

- The reports included in the **Time & Expense Entry Reports folder** are the reports available to all employees entering time or expenses and were designed for their needs. For this reason, the reports in this folder will return information on time and expenses which are under review, rejected or have not been submitted.
- **Pie chart** reports only show the 4 largest values as unique pieces within the pie chart. All additional values are grouped into a single piece labeled **Other**.
- Assignments from projects linked to Microsoft Project do not appear in reports. Modifications to some reports can be made to display these tasks. See **Reporting Tips & Tricks** (page 80) .

Tips:

- You can schedule reports to be automatically run and e-mailed to employees or clients by clicking the **Schedule report** button .
- Many reporting functions can be accessed by using your mouse's right click button.
- We regularly add free custom reports to our website that are available for downloading. To view a list of these reports, go to: http://www.dovico.com/reports.html.
- If you want to make everyday reports easily available, see **Reporting Tips & Tricks** (page 80).
- Reports can be converted from **Letter to A4** or vice versa (page 81).

Reports may contain one or more of the following parameters:

- **List** field: Select the projects, employees, clients, etc, to report on.
- **Filter by Custom Field** option: Displayed above some list fields, the Filter by Custom field checkbox limits the report to only those records that match specific data entered in custom fields. When checked, the custom fields for the view listed (employee list, project list, etc) are shown. Only those custom fields that have data entered in them are displayed in this list.

  The list of custom fields available to report on is formatted as follows:

  Custom Field name | | Custom field data

  For example; if an Employee view custom field called "IT Skillset" has 3 possible selections (C++, Oracle and SQL) and only 2 have ever been selected from the Employees view, the following custom fields appear in the list:

  IT Skillset | | C++
  IT Skillset | | SQL

- **Filter by Date Range** option: Check this box to select the From and To date range for the report or un-check to display all records.
- **Project Status** list: Displayed on some project reports, select the project statuses to report on.
- **Hours Over** field: Displayed on certain time reports, the report will display all employees having more than the specified number of approved hours for the selected date range.
- **Hours Under** field: Displayed on certain time reports, the report will display all employees having less than the specified number of approved hours for the selected date range.
- **Active Employees Only** checkbox: Check this option to only report on active employees. An employee is active if the current date is less than the employee's End Date.
- **Show Billable Only** checkbox: Available in certain expense reports, check this option to only see records which are billable.
- **Hide Start/End** checkbox: Available in certain time reports, check this option to not display the Start and End times on the report.
- **Overtime Only** checkbox: Available in certain time reports, check this option to only display overtime records.
- **Description Search** field: Available in certain time reports, it is used to only display time entries which have a description matching the Search field. Enter the exact text to search or use wildcards (* or %) at the beginning and end of a keyword.

Available Reports

The Reports Explorer in DOVICO Timesheet contains **over 85** built-in reports for managers/administrators and **11** reports for time and expense entry users.

Each built-in report can be previewed using the help system by clicking on either the **Sorted by Folder** book or the **Sorted Alphabetically** book located in the Contents tab under **Administrative Functions \ Reporting \ Preview Reports**.

Reports Explorer - Advanced features

The Reports Explorer view contains many advanced features permitting you to add, import, export, schedule, modify or customize reports.

Advanced Features

Add a report
Add a report folder
Modify security to a report or report folder
Modify a report's name or description
Create a custom report based on an existing report
Update a custom or built-in report
Import a report file
Export a report file
Schedule a report to run automatically

Tip: Most actions described in the following instructions are available using your mouse's **right click** button.

To add a report:

1. Select in which **folder** you would like to add the report.
2. Click anywhere in the view's right pane.
3. Click the **Add Folder / Report** button on the toolbar.
4. Enter the report **name** (up to 100 characters).
5. Enter a **description** for the report (up to 250 characters).
6. Click the **Browse** button to locate the .RPT file.
7. Locate the file and click **Open**.
8. Click **OK**.

   The report will now appear in the designated folder. The new report's security should be reviewed since, by default, the only security group having access to the new report is the same security group as the person who added the report.
9. Click on the **new report**.
10. Click the **Report Security** button on the toolbar.
11. Add or remove security groups having access to this report by using the arrow buttons.
12. Click **OK**.

Tip: We frequently add custom reports to our website that are available for downloading. To view a list of these reports go to: http://www.dovico.com/reports.html.

To add a report folder:

1. Click on the **folder** (or subfolder) where the new folder will be added.
2. Click the **Add Folder / Report** button on the toolbar.
3. Enter the folder **name** (up to 100 characters).
4. Click **OK**.

The new folder will now appear. The new folder's security should be reviewed since, by default, the only security group having access to the new folder is the same security group as the person who added the folder.

5. Click on the **new folder**.
6. Click the **Report Security** button on the toolbar.
7. Add or remove security groups having access to this folder by using the arrow buttons.
8. Click **OK**.

Note: Modifying security settings for a folder **does not automatically** adjust the security for the reports or subfolders within that folder. Security for each report or subfolder must be modified individually.

To modify a report or folder security setting:

1. Click on the report or report folder that you would like to modify.
2. Click the **Reports Security** button on the toolbar.
3. Add or remove security groups having access to this report (or folder) by using the arrow buttons.
4. Click **OK**.

Note: Modifying security settings for a folder **does not automatically** adjust the security for the reports or subfolders within that folder. Security for each report or subfolder must be individually modified.

To modify a report's name or description:

1. Click on the **report** to modify.
2. Click the **Report Properties** button on the toolbar.
3. Modify the **name** and **description** as required.
4. Click **OK**.

Note: The **name** and **description fields** use **custom terminology**. Please refer to the Developers section of DOVICO's web site (www.dovico.com/developer.html) for a detailed explanation of how custom terminology is implemented within report titles and descriptions.

To update a custom or built-in report:

After modifying an existing custom or built-in report, it's important to update the report in the database.

1. Locate and **click** on the report that you would like to update.
2. Click the **Report Properties** button on the toolbar.
3. Check the **Update** check box.
4. Click the **Browse** button and navigate to the new report (.rpt file).
5. Click on the **new report** and select **Open**.
6. Click **OK**.

To create a custom report using an existing report:

Prerequisite: To create a custom report, you must have Crystal Reports version 9.0.

1. Select the **report** to copy.
2. Click the **Create Custom Report** button on the toolbar.
3. **Open** the file.
4. Crystal Reports will now open the report for editing.

5. When you have completed editing the file, select File, Save.
6. **Add the custom report** to any folder using the instructions in: **To add a report** or **To update a custom report**.

To export a report file:

This function exports an RXP file (a DOVICO specific file format). The export function is mainly used to export files so that they can be imported to other Report Explorer folders. To export a final (generated) report, simply run the report as normal and click the Export button at the top of the view.

1. Select the **report file** to export.
2. Click the **Export report** button on the toolbar.
3. Click **Save**.
4. **Browse** to a location to save the report and click **Save**.

Note: When exporting reports, you cannot export a report to which you do not have security access.

Tip: You can export all reports within a folder by selecting the report folder and clicking the Export report button on the toolbar.

To import a report file:

1. Select the **report folder** where the report will be imported.
2. Click the **Import report** button on the toolbar.
3. Click the **Browse** button and navigate to the .rxp file and click **Open**.
4. Click **OK**.

Notes:

- When importing a reports folder, if the folder already exists, it will not overwrite the existing folder. It will skip this folder so that the existing folder can maintain its existing permission set.
- When importing a report, you cannot replace a report for which you do not have access.

To schedule a report to run automatically:

You can schedule a report to run automatically from the Reports Explorer view.

1. **Right click** on the report to schedule and select **Schedule**.
2. Follow all report wizard instructions and click **Finish**.
3. After the report is displayed, click the **Add to report job** button at the top to launch the Job Scheduler window.
4. From the Job Scheduler window's Data tab, use the **Name drop-down** list to either select to add this report to a **new job** (Create a new job...) or select to add this report to an **existing reporting job**. All existing reporting jobs are displayed under the "Create a new job..." option.
5. Use the **Recipients**, **SMTP** and **Schedule** tabs to complete the scheduled job's details. See **Automatic Reporting** (page 122) for complete details on each tab.

Reporting Tips and Tricks

Tips & Tricks #1:

If you are repeatedly using the same reports and you don't like to search through all the folders to find them, you can easily copy your everyday reports to a new folder, and as a result make them accessible in one, easy to find, location.

To copy an existing report to a custom folder:

Step 1: Create a custom or personal reports Folder

a. Select **Reports Explorer** from the side navigation bar.
b. Click on the top most **folder** on the left-hand side of the view.
c. Click the **Add Folder** button on the toolbar to create a new folder.
d. Enter a **name** for the new folder and click **OK**.

Step 2: Export the report

a. Click on the **report** you wish to copy.
b. Click the **Export Report** button on the toolbar.
c. Click **Save**.
d. **Browse** to the location where you will temporarily export the report and click **Save**.

Step 3: Add the report to the custom folder

a. Click on the **Custom Folder** created in Step 1.
b. Select **Import Report** from the toolbar.
c. **Browse** to the location where the report was exported in Step 2.
d. Select the **report**.
e. Click **Open**.
f. (**Optional**) Right click on the report and apply **security settings** as required.

Repeat Steps 2 and 3 to add additional reports to the custom folder.

You can now delete the report from the location where it was exported in Step 2.

Tips & Tricks #2

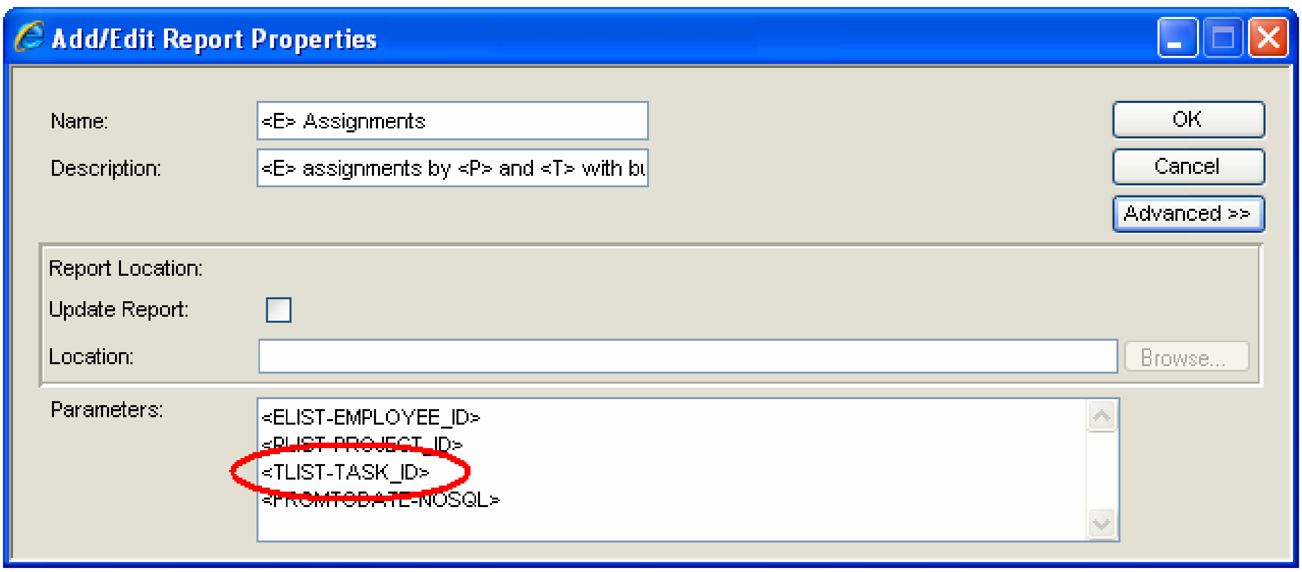
Displaying Microsoft Project tasks in Reports:

Problem: Some reports do not show assignments and tasks when these items have been imported from Microsoft Project or Microsoft Project Server. When DOVICO Timesheet imports tasks from Microsoft Project, these tasks are not available whenever a list of tasks is displayed such as found in the Task pick list when generating reports or in the Task view.

Possible Solution
One possible solution is to remove the option to select Tasks when generating specific reports. As a result, if no list of tasks is required, then the report will display data on all tasks (including those imported from Microsoft Project). There a few things to consider before implementing this solution.

- Report properties will have to be manually adjusted to those specific reports where this is required.
- If you occasionally require to run the same report for specific tasks, then a copy of the original report can be made and kept in the same folder as the modified report. **Note**: One of the reports will have to be renamed.

1. Locate and right click on the report to modify.
2. Select **Properties**.
3. Click the **Advanced>>** button.
4. Delete the **<TLIST-TASK_ID>** parameter.
5. (**Optional**) Modify the report Name or Description.
6. Click **OK**.



Report paper size

The following describes how to convert DOVICO Timesheet's report paper size from **Letter** (8 ½ x 11) to **A4** or vice versa.

Note: Only the reports received with the original installation will be converted. Any reports added or customized will not be converted.

To switch report paper sizes:

1. Contact **DOVICO Support** (support@dovico.com) to request the required file. Please indicate the software and version currently in use.
2. Run the file and extract the contents into the directory where DOVICO Timesheet is installed.
3. Run the file labeled **A4.exe**.
4. Enter the **MSDE/SQL Server Name**, **Database Name**, the **User ID** and **Password** for the server.
5. Select the new **Report format**.
6. Click **OK**. The Set Report Format window will automatically close when the update is complete.

Budgeting and Costing

DOVICO Timesheet's budgeting and costing functions are crucial for those creating detailed company and client cost budgets (estimates) and for those tracking actual time and costs against estimates (budgets).

DOVICO Timesheet uses rates and time estimates to calculate estimated client and company costs. These are automatically calculated for each task assignment created for a project. These estimated costs, along with actual client and company costs calculated for each approved time entry are displayed in several key locations within DOVICO Timesheet and in numerous reports.

Several options are available to view and edit estimates and costs, either at the individual time entry level, or at the project level.

In Budgeting and Costing ...

Budgeted Time & Costs

Budgeted Time & Costs is a powerful view important for those wanting to create detailed company and client cost budgets (estimates) and for those tracking actual time and costs against estimates.

The following explains (1) the factors used in calculating estimated company and client costs, (2) how to create a budget (estimated time and costs) for a project, (3) how to edit estimates for multiple projects and task assignments, (4) describes how to review summary cost information for a project, and (5) how to locate (filter) the items which are over budget on time.

Notes:.

- Expense budgets are prepared using the **Budgeted Expenses** view (page 99).
- Cost and rate details can be hidden from specific users by selecting the appropriate Cost Security options in the Security Groups view (page 167).

How estimated company and client costs are calculated:

Estimated client and company costs are automatically calculated for each task assignment created for a project. These estimated costs are displayed in several key locations within DOVICO Timesheet and in numerous reports. The following defines company and client estimated costs and identifies the factors used in their calculation.

Estimated company cost is the calculated amount used to determine your company's estimated cost to accomplish a task or project.

For each task assignment, the factors used in calculating estimated company costs are:

- **Estimated hours**: The estimated number of hours required by an employee to finish the task.
- **Adjusted hours**: The adjusted number of hours required by an employee to finish the task.
- **Rate of wages**: The hourly wage rate (pay rate) for the employee assigned to the task. This is initially set using the rate of wages assigned to the employee.

  Estimated company cost = (estimate hours + adjusted hours) x rate of wages

Estimated client cost is the calculated amount used for billing clients (or for charge back) for tasks or projects.

For each task assignment, the factors used in calculating estimated client costs are:

- **Estimated hours**: The estimated number of hours required by an employee to finish the task.
- **Adjusted hours**: The adjusted number of hours required by an employee to finish the task.
- **Task Prorating**: A multiplier assigned to the task. Used when you charge clients more (or less) for time spent on specific tasks. This is initially set using the value in the task's prorating field.
- **Rate charged**: The hourly rate charged (billable rate) for the employee assigned to the task. This value is initially set using the rate charged assigned to the employee.

  Estimated client cost = (estimate hours + adjusted hours) x rate charged x task prorating

To create a budget for a project:

Prerequisite:

- Before entering estimated time for a project, you should complete all employee and task **assignments** for that project.

Tip: You can alternately create a single, total time estimate for an entire project using the **Project Estimate total** function (page 89).

1. The Budgeted Time & Costs view is accessed by clicking the **Project Workspace** button in the Projects section of the side navigation bar and then clicking the **Budgeted Time & Costs** tab at the top of the screen.
2. Select the **project** from the drop-down list located at the top of the window.

   Each task assignment for the selected project is displayed in the grid. For each task assignment, the default budget information is displayed.

   Note: The number of task assignment rows displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (upper right corner of the screen) to view additional record pages.

Details on the budget information displayed:

To create a budget, there are five key factors which can be modified.

Estimated hours: The estimated hours to complete the task assignment. The estimated hours are displayed to employees entering time as the tasks' budgeted hours. The Estimated hours field is only available for editing when the project status is set to "Estimate".

Adjustments: Additional hours not included in the original estimated hours. Adjustment hours are added to the original estimated hours when calculating estimated costs. The Adjustment field is only available when the project status is set to "Active".

Rate charged: The hourly rate charged (billable rate) assigned for this task assignment. This value is initially set using the rate charged field in the employee's properties window.

Rate of wages: The hourly wage rate (pay rate) assigned for this task assignment. This value is initially set using the rate of wages field in the employee's properties window.

Task Prorating: A multiplier assigned to a task assignment. Used when you charge clients more (or less) for time spent on specific tasks. This value is initially set using the prorating field in the task's properties window.

Other information available for editing includes:

WBS code: (Work Breakdown Structure) An alphanumeric code used to represent a task's position within the hierarchical structure of the project.

Task Start and Finish dates: The start and finish dates a task is scheduled to be worked. These are important when you want to prevent an employee from entering time on a task until its scheduled period (see Only Display Scheduled Assignments on page 58).

Billable by default: The default selection for the Billable checkbox displayed to the time entry user when this task assignment is selected.

Overtime rate: An overtime multiplier assigned to the employee's rate of wages (pay rate) value. This multiplier is initially set using the prorating field in the overtime rates view.

Client overtime rate: An overtime multiplier assigned to the employee's rate charged (billing rate) value. This multiplier is initially set using the prorating field in the overtime rates view.

Information displayed (not editable)

The **Actual (h)** column displays the total hours submitted by the employee (and approved) for that particular task assignment.

The **ETC (h)** column displays the estimated hours to complete a task entered by the employee. "N/A" appears when no value has been entered and "Complete" appears when the employee enters 0.

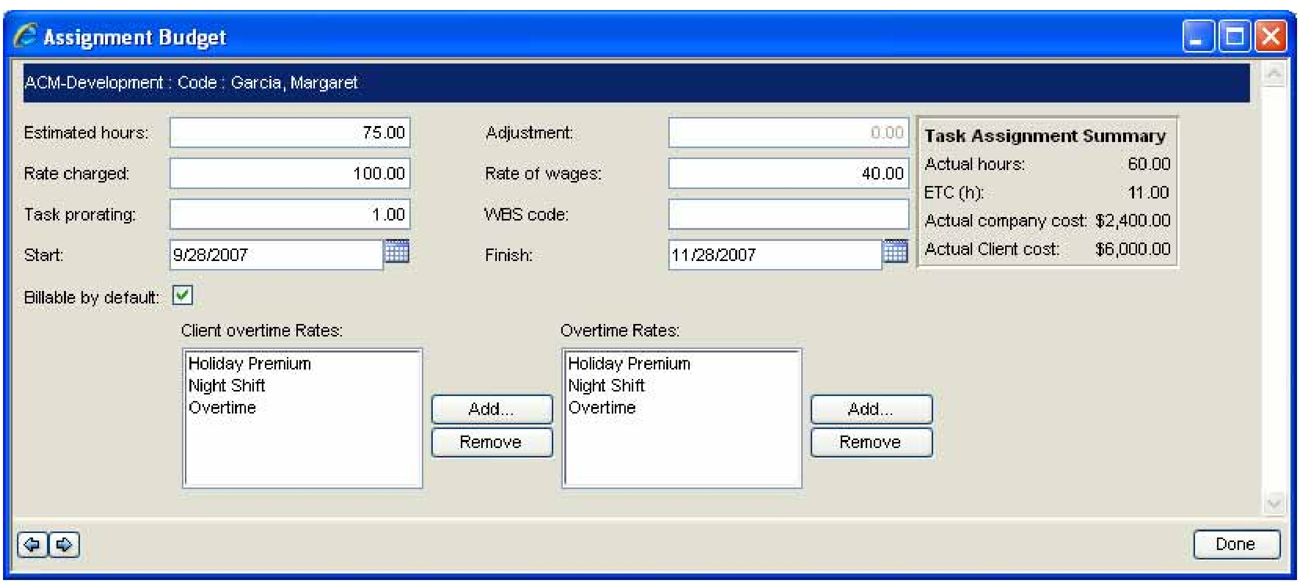
The task **description** entered by the employee.

Note: For projects linked to Microsoft Project, the Estimated hours, Adjustment, WBS, Start and Finish date fields cannot be modified.

Option A: Add or edit each task assignment row's estimated cost:

1. Click on the **task assignment row** to edit and click the **properties** button on the toolbar.
2. **Add** (or edit) information in each field as required.

Note: Rate, Cost and Overtime information is only available to users with appropriate security rights.



To add a **client overtime rate** to a task assignment:

a) Click the **Add** button located to the right of the **Client overtime Rates** list box.

b) **Select** one or more **client overtime rates** from the pop-up window and click **Add**.

- The client overtime rates applied here are available to the employee entering time for this assignment and are used to calculate client costs.

To add a **company overtime rate** to a task assignment:

a) Click the **Add** button located to the right of the **Overtime Rates** list box.

b) **Select** one or more **company overtime rates** from the pop-up window and click **Add**.

- The company overtime rates applied here are available to the employee entering time for this assignment and are used to calculate company costs.

3. Click the **Next Record** button to automatically save the changes and move to the next record. Or click **Done** to save the changes and close the window.

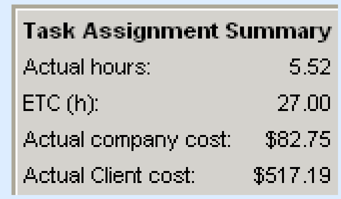
Task Assignment Summary details:

Actual hours: The actual hours submitted (and approved) for this task by the employee.

ETC (h): The Estimate Time to Complete for this task as entered by the employee.

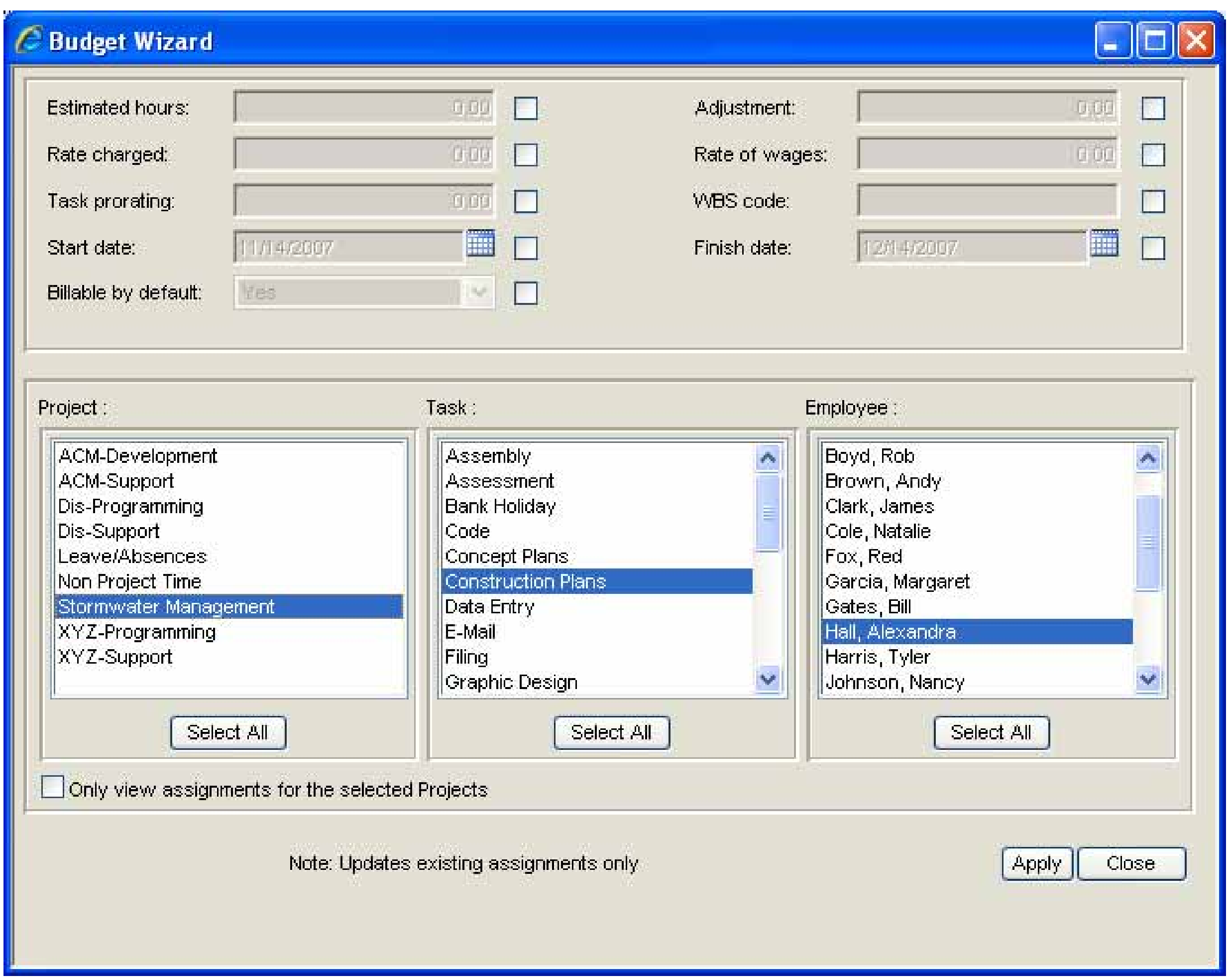
Actual company cost: The calculated company cost for this task assignment.

Actual client cost: The calculated client cost for this task assignment.



Option B: Add or edit estimated cost information across multiple projects and task assignments:

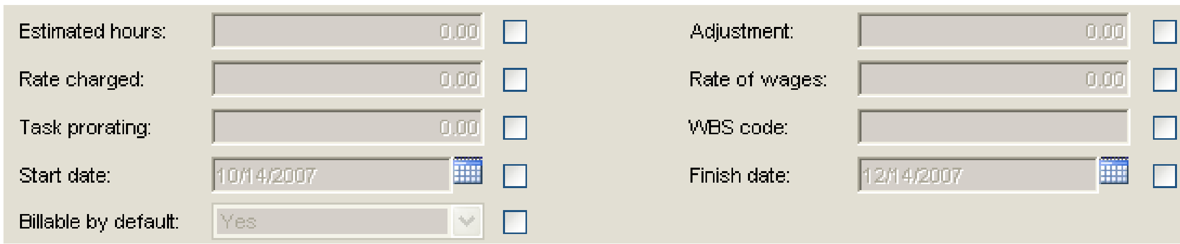
1. Select any task assignment row in the Budgeted Time & Costs view.
2. Click the **Budget Wizard** button on the toolbar.



3. Select the project, tasks and employees for which the estimate modifications will be applied. When the Budget Wizard is initially launched, the lists highlight the project, task and employee originally selected in the grid.

The list boxes initially display all available projects, tasks and employees. To only view tasks and employees assigned to a specific project, select the project and check the **Only view assignments for the selected Projects** checkbox.

4. Modify any of the available fields by first selecting the **checkbox** and modifying the **value**.



> **Notes:**
> - Modifying any of these factors **only alters** the values for future time entries entered against **the specific task assignments** selected. The original sources for these various proratings, rates, etc. are not affected.
> - To display the tasks linked to Microsoft Project within the Task list, first select the project linked to Microsoft Project in the Project list and then check the 'Only view assignments for the selected Projects' box.
> - For projects linked to Microsoft Project, the Estimated hours, Adjustment, WBS, Start and Finish date fields cannot be modified.
> - Rate information is only available to users with appropriate security rights.

5. Click **Apply** to update the estimate information.

To edit a single task assignment's estimated cost:

1. Select the **project** from the Project drop-down list near the top of the view.
2. Optionally select an **Employee** and **Task** from the drop-down lists at the top of the view to further narrow the information displayed in the grid.
3. Click the task assignment **row** to edit.
4. Click the **Properties** button on the toolbar.
5. Modify any of the available fields:

> **Notes:**
> - Modifying any of these factors only alters the values for future time entries entered against the specific task assignment selected. The original sources for these various proratings, rates, etc. are not affected.
> - Rate, Cost and Overtime information is only available to users with appropriate security rights.

6. Click **Done** to automatically save and close the window.

> **Tips:**
> - Use the **Show/Hide column** function to personalize what information is displayed in the Budgeted Time & Costs view's grid.
> - **Double click** an item in the grid to see that item's properties.

To review a project's estimated vs. actual time and costs:

1. Select the **project** from the Project drop-down list near the top of the view.

   The project time and cost summary information is displayed at the top of the screen. It compares estimate and actual values for Total Hours, Company costs and Client costs.

Project Summary	Estimate / Actual	Estimate / Actual	Estimate / Actual
	Hours: 990.00 / 522.20	Company cost: $24,420.00 / $11,509.40	Client cost: $117,750.00 / $58,412.50

Notes

- Company or Client costs are only displayed to users with appropriate security rights.
- The "Actual" data displayed in the Project Summary area includes any time entries added to the project using the **Time Calendar** view. When a manager or system administrator uses the Time Calendar view to enter time for an employee, time may be added against a task which is not assigned to this project. Because there is no assignment for this project/task/employee combination, no budget exists for this assignment and therefore no actual hours are displayed in the Budgeted Time & Costs view. This can explain why the sum of the hours in the Actual hours column may not add up to the actuals hours displayed in the Project Summary area.
- Detailed actual vs. estimate reports are available from the **Reports Explorer** view.
- Modifying the information displayed in the grid by using the Task or Employee drop-down lists does not alter the Project Summary information.

To locate task assignments which are over budget on time:

Note: The budget filter determines which task assignments are over budget **on time**. To review task assignments which are over budget **on costs**, you can use one or more of the available **Client and Company cost reports**.

1. Select the **project** from the Project drop-down list near the top of the view.
2. Click the **Filter** button on the toolbar to display the Budget filter window.
3. Check the **Hours over budget** box to see all task assignments that have **Actual hours** greater than **estimated + adjusted hours**.
   or
   Check the **Projected hours over budget** to see all task assignments that have **Actual hours + ETC** greater than **estimated + adjusted hours**.

You can also use this **filter** to view task assignments that have **no ETC** or **no budgeted hours** (estimate or adjusted hours).

Note: When more than one box is checked, the filter returns only the data that matches all the selected criteria (an AND operation).

Project Estimate Total

The **Project Estimate Total** function permits a person to enter the estimated total number of hours (budgeted hours) that a project is scheduled to take to complete. This value is displayed in the Budgeted Time & Costs view, The Actual Time & Costs view, and in various reports to monitor actual vs. estimates hours.

> **Note:** Hours entered using the Project Estimate Total are evenly distributed across assigned employees and tasks for the project. Estimated hours are not redistributed when Employees are added to the project after the Project Estimate Total has been set.

You can also create or modify estimates at the individual task/employee level using the **Budgeted Time & Costs** view.

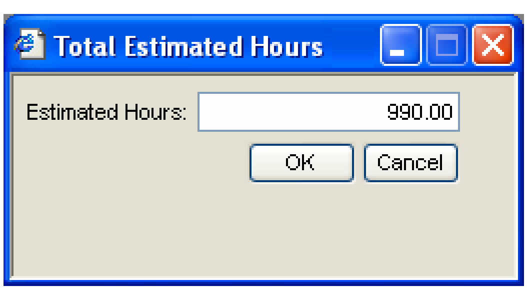
Prerequisites:

- A Project Estimate Total can only be entered for a project when that project's status is set to **Estimate**.
- Before entering estimated time for a project, you should complete all employee and task assignments for that project.

To enter total estimated hours for a project:

1. Go to the **Project Workspace** area and click the **Project Assignments** tab. The Project Workspace button is in the Projects section of the side navigation bar.
2. Locate and select the **project** in the assignment tree.

3. Click the **Project Estimate** button located on the toolbar. The **Total Estimated Hours** window opens.



4. Enter the total number of **Estimated Hours**.
5. Click **OK** to save the information and evenly distribute this total across all task assignments.

> **Warning:** If estimated hours have been individually set using the Budgeted Time & Costs view, pressing OK on the Total Estimate Hours window will clear the individual values and evenly distribute the total hours across all task assignments.

Actual Time & Costs

Actual Time & Costs is a powerful view important for those tracking time and costs against estimates, and for those wanting to edit the costs (company and client costs) associated with a project's approved time entries.

The following explains (1) the factors used in calculating company and client costs, (2) describes how to review summary cost information for a project, (3) how to edit the cost factors for an individual task assignment and (4) how to edit cost factors for multiple projects and task assignments.

Notes:

- Cost and rate details can be hidden from specific users by selecting the appropriate Cost Security options in the Security Groups view (page 167).
- Only approved time entries are displayed in the Actual Time & Costs view.
- Expense costs can be reviewed using the **Actual Expenses** view.

How actual company and client costs are calculated:

Actual client and company costs are automatically calculated for each approved time entry. These costs are displayed in several key locations within DOVICO Timesheet and in numerous reports. The following defines company and clients costs and identifies the factors used in their calculation.

Actual company cost is the calculated amount used to determine <u>your company's</u> cost to accomplish a task or project.

For each approved time entry, the factors used in calculating company costs are:

- **Hours worked** (Duration): The number of hours worked by an employee on the task.
- **Rate of wages:** The hourly wage rate (pay rate) for the employee assigned to the task. This is initially set using the rate of wages assigned to the employee.
- **Overtime (OT) wage prorating**: An overtime multiplier assigned to the employee's rate of wages value. This multiplier is initially set using the prorating field in the overtime rates view.

  Company cost = hours worked x rate of wages x overtime wage prorating

Actual Client cost is the calculated amount used for <u>billing clients</u> (or charge back) for tasks or projects.

For each approved time entry, the factors used in calculating client costs are:

- **Billable Hours worked** (Duration): The number of billable hours worked by an employee on the task.
- **Task Prorating:** A multiplier assigned to the task. Used when you charge clients more (or less) for time spent on specific tasks. This is initially set using the value in the task's prorating field.
- **Rate charged**: The hourly rate charged (billable rate) for the employee assigned to the task. This value is initially set using the rate charged assigned to the employee.
- **Overtime (OT) charge prorating**: An overtime multiplier assigned to the employee's rate charged value. This multiplier is initially set using the prorating field in the overtime rates view.

  Client cost = billable hours worked x task prorating x rate charged x overtime charge prorating

To review a project's estimated vs. actual time and costs:

1. Click the **Actual Time & Costs** button located in the Time & Expenses section of the side navigation bar.
2. Select the **project** from the Project drop-down list near the top of the view.

   The project time and cost summary information is displayed at the top of the screen. It compares estimate and actual values for Total Hours, Company costs and Client costs.

Project Summary	Estimate / Actual	Estimate / Actual	Estimate / Actual
	Hours: 990.00 / 522.20	Company cost: $24,420.00 / $11,509.40	Client cost: $117,750.00 / $58,412.50

Notes

- Detailed actual vs. estimate reports are available from the **Reports Explorer** view.
- Modifying the information displayed in the grid by using the Task or Employee drop-down lists does not alter the Project Summary information.
- Company or Client costs are only displayed to users with appropriate security rights.

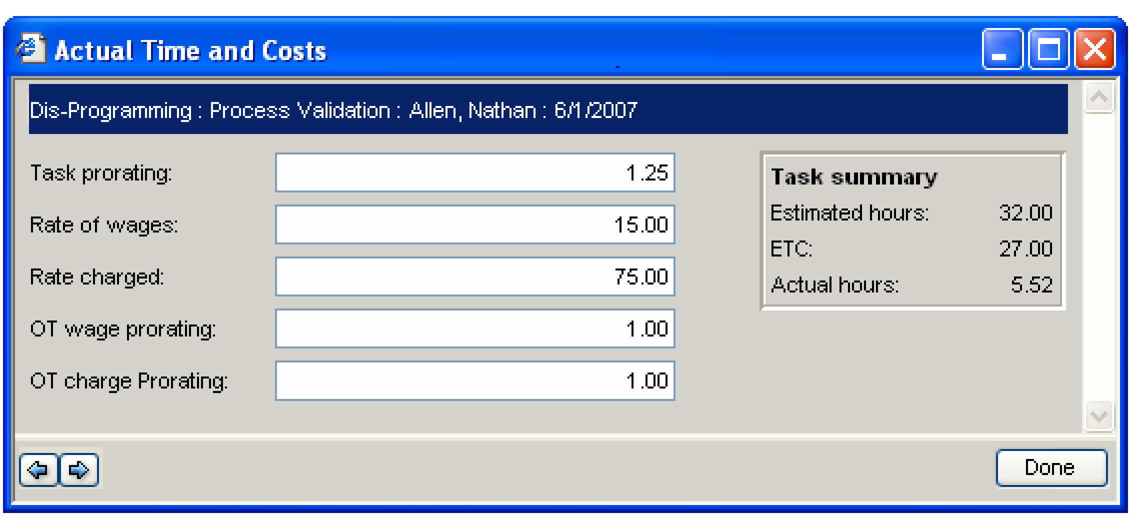
To edit a single task assignment's cost factors:

1. Click the **Actual Time & Costs** button located in the Time & Expenses section of the side navigation bar.
2. Select the **project** from the Project drop-down list near the top of the view.

   Each approved time entry for the selected project is displayed in the grid.

   Note: The number of rows displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (upper right corner of the screen) to view additional record pages.

3. Optionally select an **employee** and **task** from the drop-down lists at the top of the view to further narrow the number of records displayed in the grid.
4. Click the task assignment **row** to edit.
5. Click the **Properties** button on the toolbar.
6. Modify any of the available cost factors.
7. Click **Done** to automatically save and close the window.



Notes:

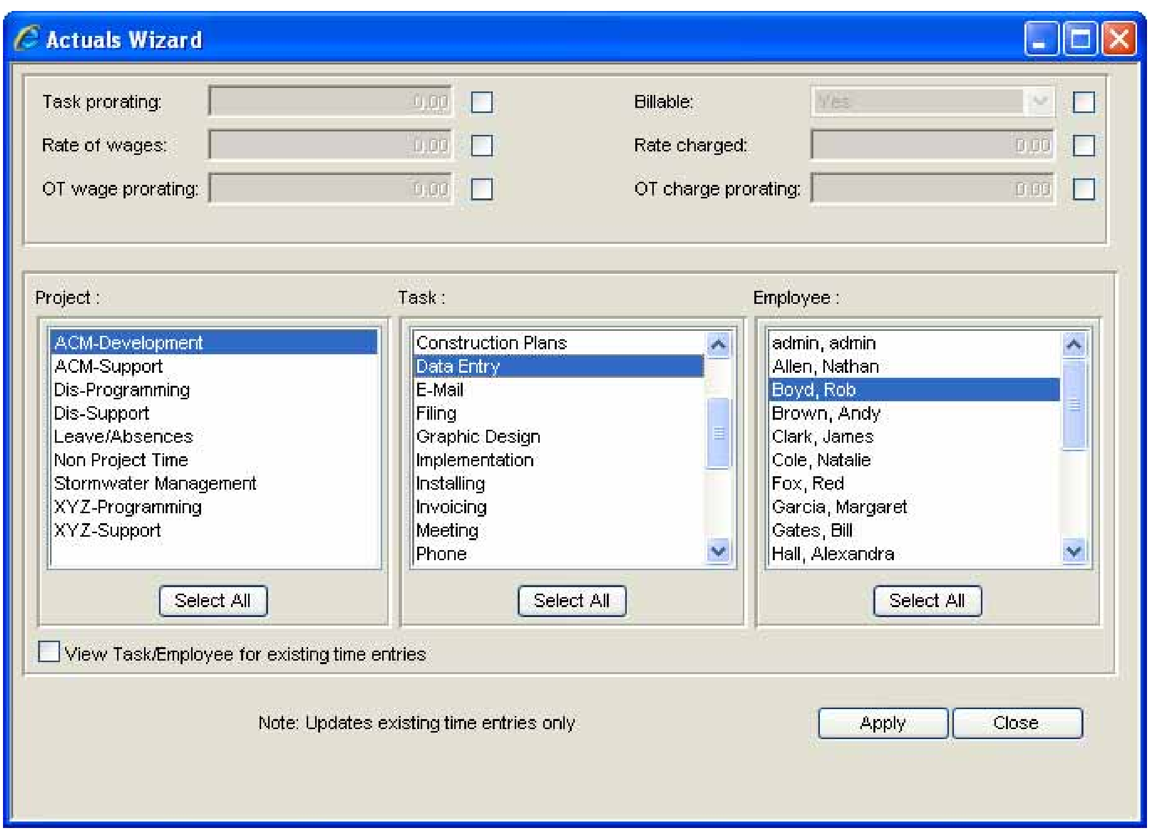
- Modifying any of these factors **only alters** the values for **this specific combination of time entry, project, task and employee**. The original source for these proratings and rates are not affected and future time entries entered against this task assignment will continue to use the original values. To modify cost factors for future time entries, use the Budgeted Time & Costs view.
- The OT charge Prorating value cannot be edited if the time entry is set as non-Billable.
- To modify a task assignment's Billable status, use the Actuals Wizard (see below) or locate and edit the time entry using the **Time Calendar** view.
- Rate and Overtime (OT) information is only available to users with appropriate security rights.

Task Summary details

Estimated hours: The total estimated and adjusted hours required to accomplish this task.
ETC: The number of remaining hours the employee estimates are required to complete this task.
Actual hours: The total approved hours entered against this task for this employee.

To edit cost factors for multiple projects and task assignments:

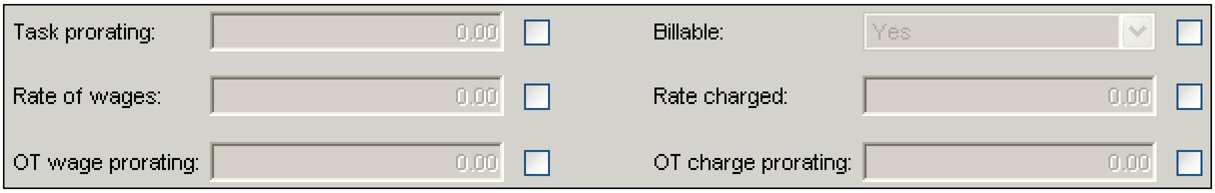
1. Click the **Actual Time & Costs** button located in the Time & Expenses section of the side navigation bar.
2. Click **any** task assignment **row**.
3. Click the **Actuals Wizard** button  on the toolbar.



4. Select the projects, tasks and employees for which the cost modifications will be applied. When the Actual Wizard is initially launched, the lists highlight the project, task and employee originally selected in the grid.

   The 3 list boxes initially display all available projects, tasks and employees. To only view a project's task assignments which have existing time entries, select the project from the list and check the **View Task/Employee for existing time entries** box.

5. Modify any of the available cost factors by first selecting the checkbox and modifying the value.



Notes:

- Modifying any of these factors **only alters** the values for **the specific task assignments** selected. The original source for these various proratings and rates are not affected and future time entries entered against the task assignments will continue to use the original values. To modify cost factors for future time entries, use the Budgeted Time & Costs view.
- To display the tasks linked to Microsoft Project within the Task list, first select the project linked to Microsoft Project in the Project list and then check the 'View Task/Employee for existing time entries' box.
- Rate and Overtime (OT) information is only available to users with appropriate security rights.

6. Click **Apply** to update all existing time entries with the updated cost factors and then **Close**.

Tips:

- **Cost and rate details** can be hidden from specific users by selecting the appropriate Cost Security options in the Security Groups view (page 167).
- Use the **Show/Hide column** function to personalize what information is displayed in the Actual Time & Costs view's grid.
- **Double click** an item in the grid to see that item's properties .

Rates

In DOVICO Timesheet, **Rates** are the hourly pay and billing rates assigned to employees. Rates are multiplied by employee hours to calculate client and company costs. If you are not concerned with client and company costs, then rates are not required.

The following describes how to (1) create rates, (2) edit rates, and (3) how to retroactively enter rates after the system has been used for a period of time.

If you are tracking both company and client costs, you should create two types of rates for each employee or category of employee within your organization:

1. **Rate of wages** (pay rate): The employee's hourly paid salary plus benefits used to calculate **company costs.** If you are using Rate of wages for payroll purposes, then the rate should not reflect benefits.

   Company cost = hours worked x **rate of wages** x overtime prorating

2. **Rate charged** (billing rate): The employee's hourly charge out (billable) rate used to calculate **client costs**. If you are using rates for payroll purposes only or if you do not bill (or charge back) clients, then there is no need to create this type of rate.

   Client cost = hours worked x task prorating x **rate charged** x overtime prorating

Rates are displayed in the Employees view as an optional selection. As a result, any rate can be assigned to employees. The Rates view is also the location where **Overtime Rates** are assigned to Rates.

Prerequisite:

- **Overtime Rates** should first be created if you are paying employees, or charging clients, different rates when working overtime.

To add a new rate:

1. Click the **Rates** button located in the Rates & Billing section of the side navigation bar.
2. Click the **New** button on the toolbar.
3. Enter a unique **name** for the rate (up to 50 characters). As rates are usually created for either employees or categories of employees within your organization (John Smith, Mary Ford, Engineer, Senior Engineer, Project Manager), it is a good practice to clearly name each rate you create. For example "Engineer Wage Rate" for Rate of wages and "Engineer Charge Out Rate" for Rate charged.
4. Enter the **Rate per hour** amount. When editing a rate, a **More** button is displayed to offer more options. When creating a new rate, this button can be ignored. See page 95 for additional details on using the More button.
5. Click **Save** .

OPTIONAL INSTRUCTIONS:

6. Enter a **description** (up to 250 characters).
7. From the **Available Overtime Rates** list near the bottom of the screen, select the overtime rates which apply to this rate and click the Add button on the right-hand side.
8. Check the **Hide** box if you want to hide this rate from lists when generating reports.
9. Check the **Flag for archive** box if you want to remove this rate from the database the next time the Archive Database function is run.

10. Click **Save**.

Once the rates are created, assign the appropriate rates to employees (page 41).

To edit a rate:

1. Select a **row** and **edit** information as needed.
2. If you edit the rate, a **More** button will appear. Click the button to select your update preferences (see "More" below).
3. Click **OK** after making your update selection. If you have selected **Replace last value only**, or **Replace all values from**, a message box will appear to advise that the change applied is permanent and cannot be undone. Click **OK** to continue or Cancel.
4. Click **Save**.

To apply rates after using the system for a period of time:

1. Enter the rates in the **Rates** view if they do not currently exist.
2. For each employee receiving the new rates, open that **employee's properties window**, and select the new rates using the appropriate drop-down lists (Rate of wages and Rate charged).
3. For each modified rate, click the **More** button next to the rate field, a pop-up window opens.
4. Select the **Replace all values from** option.
5. Select a **date** that will span all previous time entries for this employee. This will apply the rate to all past and future timesheet entries.
6. Click **OK**.
7. Click **Done**.
8. Repeat steps 2 through 7 for other employees as required.

Note: The number of rates displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Tips:

- The term "Rate" can also be **customized** to better fit your company's terminology.
- Additional tabs are available at the bottom of the rates view to add **Notes**, **Phone Numbers** and **Addresses**.
- Use the **Show/Hide column** function to personalize what information is displayed in the rate view's grid.
- You can add fields to track extra rate information by using **Custom fields**.
- Use the **Find** function to locate a specific rate by **name**.

"More" button for Rates

When a rate, task prorating or overtime prorating value is changed, or when an employee is assigned a new charge or pay rate, several options (**More** button) are available that determine what changes, if any, are made to future time entries (budgeted costs) and approved time entries (actual costs).

How edited rates affect future time entries (estimated costs):

When a rate is changed or when an employee is assigned a new rate, the new rate is automatically applied to all future time entries, except where the rate was manually edited using the **Budgeted Time & Costs** view.

The same rules apply when a task prorating is edited.

Notes:

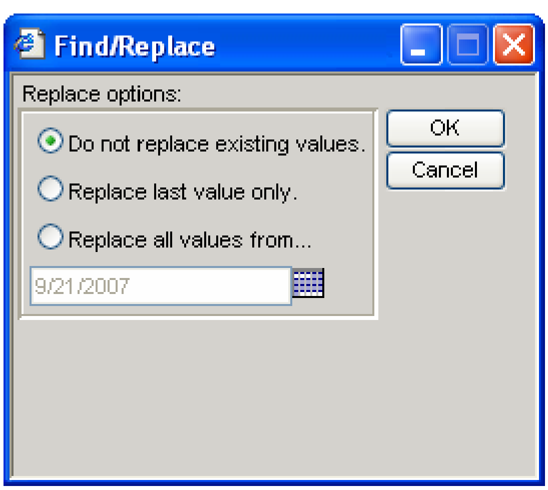
- When a rate is modified, the new rate is also automatically applied to **budgeted (estimated) costs** displayed in the Budgeted Time & Costs view and in various reports, except where the rate was manually edited using the Budgeted Time & Costs view.
- Modifying overtime proratings does not alter budgeted costs as these are not used in calculating budgeted costs:
  - Estimated company cost = (estimated hours + adjusted hours) x rate of wages
  - Estimated client cost = (estimated hours + adjusted hours) x rate charged x task prorating

Options for editing rates on approved time entries (actual costs):

When a rate is changed or when an employee is assigned a new rate, a "More" button appears next to the field. Clicking the More button offers 3 options that determine what changes, if any, are made to **approved time entries** (**actual costs**) displayed in the **Actual Time & Costs** view and in various reports. The new rate is automatically applied to future time entries except where the rate was manually edited in the Budgeted Time & Costs view.

- **Do not replace existing values** (the default option when you do not click the More button): No changes are made to rates or proratings for approved time entries.
- **Replace last value only**: To find all rates or proratings in approved time entries that exactly match the previous value and replace it with the new value. This change will not affect rates or proratings that do not match the previous value.
- **Replace all values from**: To find and replace all rates or proratings, regardless of its previous value, in approved time entries, from (and including) the selected date.

The same rules apply when a task prorating or overtime prorating is edited.



Overtime Rates

DOVICO Timesheet uses **Overtime Rates** to establish a prorating (multiplier) that is then assigned to employee **Rate of Wages** and **Rate Charged hourly rates** (pay and charge out rates). Accordingly, when employees work overtime, they have the option to select an overtime rate from the time entry tool, and the appropriate client or company costs are calculated.

> Company overtime cost = hours worked x rate of wages x **overtime prorating**
> Client overtime cost = billable hours worked x task prorating x rate charged x **overtime prorating**

For example, if an overtime rate called "Time and ½" is assigned to the Senior Analyst Rate Charged rate, then all employees who are assigned the Senior Analyst Rate Charged rate, are able to select the "Time and ½" rate when working overtime.

> Example: Mary is assigned the Senior Analyst Rate Charged hourly rate ($150/hour). This hourly rate has the "Time and ½" overtime rate (1.5) assigned to it. When Mary submits 2 overtime hours on a billable project, the client costs is calculated as $150 x 1.5 x 2 hours = $450.

- Overtime rates can be general (double time) and assigned to all rates or can be specific (ACME project weekend rate) and assigned to only one rate.
- Overtime rates are not required if your company does not track client or company costs or does not track overtime.

To add an overtime rate:

1. Click the **Overtime Rates** button located in the Rates & Billing section of the side navigation bar.
2. Click the **New** button on the toolbar.
3. Enter a unique **name** for the overtime rate (up to 50 characters). The name should clearly identify the rate since this rate will be displayed (when applicable) in an Overtime drop-down list in the time entry screen.
4. Enter the **prorating** multiplier for the overtime rate. By default, a prorating value of 1 is assigned to a new overtime rate. When editing a prorating, a **More** button is displayed to offer more options. When creating a new overtime rate, this button can be ignored. See page 95 for additional details on using the More button.
5. (**Optional**) Enter a **description** (up to 250 characters) – a short narrative describing, for example, to which group the overtime rate applies.
6. (**Optional**) Check the **Flag for archive** box if you want to remove this overtime rate from the database the next time the Archive Database function is run.
7. Click **Save**.

This overtime rate must now be **assigned to one or more rates using the Rates view**.

Note: The number of overtime rates displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Tips:

- You can add fields to track additional overtime rate information by using **Custom fields**.
- Additional tabs are available at the bottom of the view to add **Notes**, **Phone Numbers** and **Addresses**.
- Use the **Find** function to locate a specific overtime rate by **name**.

To edit an overtime rate:

1. Select a row and edit information as required.
2. If you edit the prorating rate, a **More** button is displayed. Click the button to select your update preferences.
3. Click **OK** after making your update selection. If you have selected **Replace last value only**, or **Replace all values from**, a message window is displayed warning that the change is permanent and cannot be undone. Click **OK** to continue or **Cancel**.
4. Click **Save** .

Budgeted Expenses

Expenses can be a significant part of a project's total budget. DOVICO Timesheet uses **Budgeted Expenses** to provide a project manager with the ability to forecast (budget) expenses for a project. This permits the manager to compare budgeted and actual expenses throughout the project lifetime to determine whether or not a project's expenses are on budget.

The following describes how to add budgeted expenses for a project.

Prerequisites:

- The **projects** associated with expenses should first be established.
- If expenses can be grouped into logical categories (meals, rentals, etc), those **expense categories** should be created.
- To enter rate-based expenses such as mileage, **expense categories** must be created.

To add a budgeted expense:

1. Click the **Budgeted Expenses** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Select the **project** associated with the expense from the project drop-down list located at the top of the screen.
3. Click the **New** button on the toolbar.

   The **budgeted expenses window** opens.
4. (**Optional**) Select an **expense category**.
5. Enter an **Amount** or **Quantity** for the budgeted expense. The Quantity field is only available if the expense category selected in step 4 has been set up as a rate-based expense category.
6. (**Optional**) Modify the expense **date** using the calendar button .
7. (**Optional**) Enter a **description** for the expense.
8. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new budgeted expense.

Note: The number of budgeted expense rows displayed in the view is limited by the **Paging** setting (page 150).

You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Tips:

- To view or edit details for more than one budgeted expense, open an expense's properties window and use the **Next Record** button (or Previous) to move to the next item in the view. Clicking the Next (or Previous) button automatically saves any changes made.
- **Double click** an item in the grid to see that item's properties .
- Use the **Show/Hide column** function to personalize what information is displayed in the Budgeted Expenses view's grid.
- You can add fields to track extra budget expense information by using **Custom fields** .
- Use the Expense Category drop-down list at the top of the screen to filter a project's budgeted expenses by category.
- Additional tabs are available at the bottom of the budgeted expenses properties window to add **Notes**, **Phone Numbers** and **Addresses**.

Automated E-mail Notifications and Reports

A variety of **e-mail notifications**, **alerts** and **reports** can be configured to be automatically sent to employees and managers using the **Job Scheduler**.

Automated notices and alerts can be critical to business efficiencies when managers need to know when specific project time and cost targets have been reached, or when managers and employees are required to perform certain tasks such submitting or approving time and expenses.

In Automated Functions...

Using the Job Scheduler, regular database maintenance can also be configured (page 121).

E-mail Notifications and Alerts - Overview

The following summarizes the different types of e-mail notifications and alerts that can be sent to employees and managers.

- Send e-mail to **approving managers** when time/expenses are **awaiting their approval**.

  To help with getting time and expenses approved in a timely manner, you can setup notifications so the approving managers are sent an e-mail whenever time/expenses are awaiting their approval. Two options are available when you want managers to receive e-mails when they have time to approve.

  1. Configure the software so that managers receive an **instant e-mail** for each submitted time or expense sheet. (page 44)
  2. Configure the software to send **one periodic (batch) e-mail** containing summary information for all sheets awaiting their approval. (page 102)

- Send e-mail to **employees** when **time/expenses have been rejected** by their manager.

  When a manager rejects time or expenses submitted by employees, there is usually a need to have the issue quickly resolved. By instantly sending e-mails to the employees, that alert them to the rejected time/expenses, both parties (approving managers and employees) can resolve any problems in an effective manner. (page 44)

- Send e-mail when established **project alert targets** for time or costs have been reached.

  More than 20 project alerts can be configured to send e-mails when projects have reached predefined goal or target limits for time and/or costs. Some of the available triggers include being notified when:

  Project has reached ‘X’ % of budgeted time (or costs)

  Project is over budget by ‘X’ number of hours (or costs)

  Project has exceeded ‘X’ number of hours (or costs)

  Project's actual time + ETC are over budget

  Project Billable time has reached ‘X’ number of hours

  and more... (page 109)

- Send e-mail to employees detailing their **project assignments**.

  Assignment notifications inform the selected users about the projects and tasks that are assigned to them. (page 103)

- Send e-mail to **employees** when their **timesheet are incomplete** (under minimum hours).

  Incomplete Timesheet Notifications alert the selected users when their timesheet is incomplete based on a specified number of hours. (page 105)

- Send e-mail to **managers** when **employee timesheets are incomplete**.

  The Manager Incomplete Timesheet Notification alerts managers when selected employees have not completed their timesheet. (page 107)

Time and Expenses Awaiting Approval Notifications

The Job Scheduler's **Time & Expenses Awaiting Approval Notification** feature provides the ability to schedule an e-mail notifying approving managers that they have time or expense sheets requiring their approval.

At the scheduled time, each approving manager receives an e-mail summarizing the time/expense sheets awaiting their specific approval. Managers can also receive an e-mail immediately after each employee submits a time/expense sheet. This Instant Notification option can be configured from the manager's employee profile (page 44).

Sample e-mail sent to approving managers

Timesheet(s):

Employee	Sheet Name	Date Range
Boyd, Rob	Timesheet for Boyd, Rob from 7/22/2007 to 7/28/2007.	25/07/2007 - 25/07/2007
Cole, Natalie	Timesheet for Cole, Natalie from 7/22/2007 to 7/28/2007.	25/07/2007 - 25/07/2007
Moore, Sarah	Timesheet for Moore, Sarah from 7/22/2007 to 7/28/2007.	26/07/2007 - 26/07/2007

To create a time & expenses awaiting approval notification:

1. Click the **Job Scheduler** button located in the Tools section of the side navigation bar.
2. Select **Notification** from the drop-down list at the top left corner of the screen. If Notification was previously selected, then click the **New** button on the toolbar.

   The Job Scheduler window opens.

   On the **Data (Step 1)** tab
3. Enter a **name** for this job (up to 100 characters).
4. (**Optional**) Enter a **description** (up to 250 characters).
5. Select **Time & Expenses Awaiting Approval** from the Notification Type drop-down list.
6. **Check** the boxes to notify the approving managers (selected in step 8) when they have either **timesheets** and/or **expense sheets to approve**.
7. (**Optional**) Modify the text shown in the e-mail by clicking on the **Change Notification Text...** link (page 124).

   On the **Recipients (Step 2)** tab
8. From the Managers available list box, select the **managers** that are **to be notified** and move them to the Managers selected list box using the **Move** button.

   Note: The Managers available list includes all employees with valid e-mail addresses and with access to administrative views (assigned to "All" in the employee properties Software access field).

   On the **SMTP (Step 3)** tab
9. Verify (or enter) the **SMTP server**, the **SMTP port** and **Reply address** information. Optionally check the **Use SMTP Authentication** box for secure SMTP communications. The default information displayed is established in the Database Options view's **Notifications** tab.

On the **Schedule (Step 4)** tab

10. Set the **Run** schedule properties.

- **Once** at a specified date and time
- **Daily** at a specified time
- **Weekly** on a particular day at a specific time
- **Monthly** at a specific day and time

> **Note:** For customers using DOVICO's Hosted services, all run times are based on the US Central Time zone. This means if a job is set to run at 23:00, it will be run at 23:00 U.S. Central Time, regardless of your native time zone.

11. Click **Done**. The notification job is now displayed in the Job Scheduler's list of jobs.

> **Note:** All time fields in the Job Scheduler must use the 24 hour format; 23:00 instead of 11:00 PM.

> **Tip:** It's a good practice to set automated job run times when the system demands are low (evenings, overnight or other non-peak times).

Assignment Notifications

The Job Scheduler's **Assignment Notifications** feature provides the ability to send e-mails to selected users detailing their project and task assignments. Employees only see their own assignments and only for the specified reporting date identified in the e-mail.

Prerequisite:

- Assignment Notifications are generated based upon the Start and Finish dates for each task assignment as defined in the Budgeted Time & Costs view. These Start and Finish dates must be established - and maintained for the Assignment Notifications to be truly effective.

Sample e-mail sent to employees

REPORTING PERIOD: From 01/08/2007 to 31/08/2007

Project	Task	Start Date	Finish Date
Dis-Programming	Assessment	01/07/2007	01/09/2007
Dis-Programming	Process Validation	28/07/2007	01/10/2007
Hal-Stormwater Management	Concept Plans	28/06/2007	15/08/2007
Hal-Stormwater Management	Initial Design	28/06/2007	01/08/2007
Hal-Stormwater Management	Specifications	12/07/2007	15/08/2007
Hal-Stormwater Management	Surveying	12/07/2007	15/08/2007

To create an assignment notification:

1. Click the **Job Scheduler** button located in the Tools section of the side navigation bar.
2. Select **Notification** from the drop-down list at the top left corner of the screen. If Notification was previously selected, then click the **New** button on the toolbar.

The Job Scheduler window opens.
On the **Data (Step 1)** tab

3. Enter a **name** for this assignment notification job (up to 100 characters).
4. (**Optional**) Enter a **description** (up to 250 characters).
5. Select **Assignment Notification** from the Notification Type drop-down list.
6. Select a **Date Range** from the drop-down list.

   The Date Range specifies which assignments are included in the e-mail based on each assignment's **start** and **finish** dates.

   - Select **For Current Day** to include only those assignments whose start and finish dates include today.
   - Select **For Current Week** to include only those assignments whose start and finish dates include one or more days for the current week (Sunday to Saturday).
   - Select **For Current Month** to include only those assignments whose start and finish dates include one or more days for the current month.

7. (**Optional**) Modify the text shown in the e-mail by clicking on the **Change Notification Text...** link (page 124).

   On the **Recipients (Step 2)** tab

8. From the Employees available list box, select the **employees** that are **to be notified** and move them to the Employees selected list using the **Move** button .

   Note: Only employees with e-mail addresses entered in their respective properties windows are displayed in the Employees available list box.

   On the **SMTP (Step 3)** tab

9. Verify (or enter) the **SMTP server**, the **SMTP port** and **Reply address** information. Optionally check the **Use SMTP Authentication** box for secure SMTP communications. The default information displayed is established in the Database Options view’s **Notifications** tab.

   On the **Schedule (Step 4)** tab

10. Set the **Run** schedule properties.

    - **Once** at a specified date and time
    - **Daily** at a specified time
    - **Weekly** on a particular day at a specific time
    - **Monthly** at a specific day and time

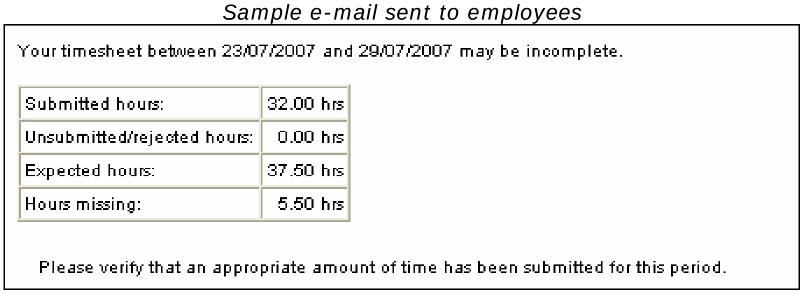
    Note: For customers using DOVICO's Hosted services, all run times are based on the US Central Time zone. This means if a job is set to run at 23:00, it will be run at 23:00 U.S. Central Time, regardless of your native time zone.

11. Click **Done**. The notification job is now displayed in the Job Scheduler's list of jobs.

Employee Incomplete Timesheet Notifications

The Job Scheduler's **Employee Incomplete Timesheet Notification** feature provides the ability to send e-mails to users when their timesheets are incomplete.

Sample e-mail sent to employees



Your timesheet between 23/07/2007 and 29/07/2007 may be incomplete.

Submitted hours:	32.00 hrs
Unsubmitted/rejected hours:	0.00 hrs
Expected hours:	37.50 hrs
Hours missing:	5.50 hrs

Please verify that an appropriate amount of time has been submitted for this period.

To create an employee incomplete timesheet notification:

1. Click the **Job Scheduler** button located in the Tools section of the side navigation bar.
2. Select **Notification** from the drop-down list at the top left corner of the screen. If Notification was previously selected, then click the **New** button on the toolbar.

   The Job Scheduler window opens.

   On the **Data (Step 1)** tab
3. Enter a **name** for this job (up to 100 characters).
4. (**Optional**) Enter a **description** (up to 250 characters).
5. Select **Employee Incomplete Timesheet Notification** from the Notification Type drop-down list.
6. In the **Warn if time is below** field, enter the number of hours (for the range to be specified below) that will trigger an Employee Incomplete Timesheet notification. Example; 37.5 hours.
7. Using the **Range of Days** drop-down list, select the period against which the Job Scheduler will search for incomplete timesheets to be included in the notification.

   Note: The date and time in which this scheduled job will be run (see “Schedule - Step 4” on next page) should be considered when selecting the date range option, as this range will **automatically advance** for jobs scheduled to be run daily, weekly or monthly. For example, if you want notices to be sent every Monday to employees whose timesheets for the previous week are incomplete, you would select the Last Week date range option.

   - Today
   - Yesterday
   - Current Week
   - Last Week
   - Current Two Weeks (This week and last week)
   - Last Two Weeks
   - Current Bi-Monthly
   - Last Bi-Monthly
   - Current Month
   - Last Month
   - Custom Range

   Options for Custom Range:

   Report for a total of 7 **days** - The notification will include information for 7 consecutive days.

Start  **days before scheduled time** - The notification's starting date is set to 10 days prior to the report's scheduled time (as set in the Schedule tab).

Result: Under these settings, if the job is set to run on June 20, the notification will include 7 days of data beginning on June 10. That is, an e-mail will be sent to employees whose timesheets between June 10 and June 16 contain less than the number of hours set in the Warn if time is below field.

8. (**Optional**) Modify the text shown in the e-mail by clicking on the **Change Notification Text...** link (page 124).

On the **Recipients (Step 2)** tab

9. From the Employees available list box, select the **employees** that are **to be notified** and move them to the Employees selected list using the **Move** button .

> **Note:** Only employees with e-mail addresses entered in their respective properties windows are displayed in the Employees available list box.

On the **SMTP (Step 3)** tab

10. Verify (or enter) the **SMTP server**, the **SMTP port** and **Reply address** information. Optionally check the **Use SMTP Authentication** box for secure SMTP communications. The default information displayed is established in the Database Options view's **Notifications** tab.

On the **Schedule (Step 4)** tab

11. Set the **Run** schedule properties.

- **Once** at a specified date and time
- **Daily** at a specified time
- **Weekly** on a particular day at a specific time
- **Monthly** at a specific day and time

> **Note:** For customers using DOVICO's Hosted services, all run times are based on the US Central Time zone. This means if a job is set to run at 23:00, it will be run at 23:00 U.S. Central Time, regardless of your native time zone.

12. Click **Done**. The notification job is now displayed in the Job Scheduler's list of jobs.

> **Note:** All time fields in the Job Scheduler must use the 24 hour format; 23:00 instead of 11:00 PM.

> **Tip:** It's a good practice to set automated job run times when the system demands are low (evenings, overnight or other non-peak times).

Manager Incomplete Timesheet Notifications

The Job Scheduler's Manager Incomplete Timesheet Notification feature provides the ability to send e-mails to managers listing employees having incomplete timesheets.

Sample e-mail sent to managers

The following Employees may have incomplete timesheets for the following date range: 23/07/2007 - 29/07/2007

Employee	Submitted Hours	Unsubmitted/Rejected Hours	Expected Hours	Hours Missing
Boyd, Rob	31.00	7.50	37.50	6.50
Cole, Natalie	31.75	7.93	37.50	5.75
Harris, Tyler	28.00	0.00	37.50	9.50
Martinez, Brandon	28.00	0.00	37.50	9.50
Moore, Sarah	23.25	10.58	37.50	14.25
Walker, Jasmine	23.00	0.00	37.50	14.50

To create a manager incomplete timesheet notification:

1. Click the **Job Scheduler** button  located in the Tools section of the side navigation bar.
2. Select **Notification** from the drop-down list at the top left corner of the screen. If Notification was previously selected, then click the **New** button  on the toolbar.

   The Job Scheduler window opens.

   On the **Data (Step 1)** tab
3. Enter a **name** for this job (up to 100 characters).
4. (**Optional**) Enter a **description** (up to 250 characters).
5. Select **Manager Incomplete Timesheet Notification** from the Notification Type drop-down list.
6. In the **Warn if time is below** field, enter the number of hours (for the range to be specified below) that will trigger a Manager Incomplete Timesheet notification. Example; 37.5 hours.
7. Using the **Range of Days** drop-down list, select the period against which the Job Scheduler will search for incomplete timesheets to be included in the notification.

   Note: The date and time in which this scheduled job will be run (see “Schedule - Step 4” on next page) should be considered when selecting the date range option, as this range will **automatically advance** for jobs scheduled to be run daily, weekly or monthly. For example, if you want a weekly Monday e-mail notifying you of all incomplete timesheets for the previous week, you would select the Last Week date range option.

   - Today
   - Yesterday
   - Current Week
   - Last Week
   - Current Two Weeks (This week and last week)
   - Last Two Weeks
   - Current Bi-Monthly
   - Last Bi-Monthly
   - Current Month
   - Last Month
   - Custom Range

Custom Range Options:

Report for a total of 7 **days** - The notification will include information for 7 consecutive days.

Start 10 **days before scheduled time** - The notification's starting date is set to 10 days prior to the job's scheduled time (as set in the Schedule tab).

Result: Under these settings, if the job is set to run on June 20, the notification will include 7 days of data beginning on June 10. That is, the e-mail will list all employee timesheets between June 10 and June 16 which contain less than the number of hours set in Warn if time is below field.

8. Select the **Employees** on which to report.
9. (**Optional**) Modify the text shown in the e-mail by clicking on the **Change Notification Text...** link (page 124).

On the **Recipients (Step 2)** tab

10. From the Managers available list box, select the **managers** that are **to be notified** and move them to the Managers selected list box using the **Move** button >. The Managers available list includes all employees with valid e-mail addresses and with access to administrative views (assigned to "All" in the employee properties Software access field).

On the **SMTP (Step 3)** tab

11. Verify (or enter) the **SMTP server**, the **SMTP port** and **Reply address** information. Optionally check the **Use SMTP Authentication** box for secure SMTP communications. The default information displayed is established in the Database Options view's **Notifications** tab.

On the **Schedule (Step 4)** tab

12. Set the **Run** schedule properties.
    - **Once** at a specified date and time
    - **Daily** at a specified time
    - **Weekly** on a particular day at a specific time
    - **Monthly** at a specific day and time

    Note: For customers using DOVICO's Hosted services, all run times are based on the US Central Time zone. This means if a job is set to run at 23:00, it will be run at 23:00 U.S. Central Time, regardless of your native time zone.

13. Click **Done**. The notification job is now displayed in the Job Scheduler's list of jobs.

Note: All time fields in the Job Scheduler must use the 24 hour format; 23:00 instead of 11:00 PM.

Tip: It's a good practice to set automated job run times when the system demands are low (evenings, overnight or other non-peak times).

Project Alerts

DOVICO Timesheet's **Project Alerts** allow a project manager to set specific time, cost or expense targets for projects, and automatically receive notices by e-mail when targets have been reached.

Forewarned is forearmed
By creating project alerts, selected employees can be automatically notified whenever a project's critical success factors are being threatened (on time, on budget, within costs). With project alert notices being sent by e-mail, there is no need to have DOVICO Timesheet continuously open and there is no need to periodically scan individual project details to determine what, if anything, is at risk. Project alert limits can be scheduled to be checked on a daily, weekly or monthly basis.

Project Alerts can be based on hours, company costs, client costs, expenses, billable/non-billable time and in any combination. The use of "intelligent" re-triggering means that if a project's budget is modified, applicable alert rules are automatically adjusted to meet the new targets.

> "Those who know that something is coming are better prepared to face it than those who do not know."

Example Project Alerts:

When a project has reached 90% of budgeted hours
When a project's total time reaches 1000 hours
When the total company costs for a project reaches $25,000
When the client costs for a project reaches 80% of the budgeted client cost
When non-billable time for a project reaches 25% of the total time spent on the project
When project expenses exceed $1,000

The following describes how to create a Project Alert job. Details on each of the available rules are found in Project Alert rule details. (page 112)

Structure
- Alert Job
  - Project(s)
    - Alert Rule(s)
  - E-Mail Recipient(s)
  - Scheduled Run Time

Project alert jobs can be as simple as one rule for one project, or can have multiple projects and multiple rules.

Example:

Project Alert **Job #1**
Project A
Notify when Actual hours reach 1000 hours

Project Alert **Job #2**
Project A, B, C and E
Notify when at 90% of budgeted time
Notify when Client Cost is $200 from budget

Notes:
- Alerts are based on project time and costs. Alerts cannot be created for specific tasks, employees, task groups, teams, etc.
- Trigger levels are only checked against the database at the alert job's next scheduled run time (daily, weekly, monthly). That is, e-mails are not sent immediately after a trigger level has been reached. If a certain level is triggered on a Monday and the job is scheduled to run every Friday, then the notification e-mail will only be sent on the following Friday.
- Expense related alerts are calculated using company expense costs and not client expense costs.

To create a project alert:

1. Click the **Job Scheduler** button located in the Tools section of the side navigation bar.
2. Select **Notification** from the drop-down list at the top left corner of the screen. If Notification was previously selected, then click the **New** button on the toolbar.

   The Job Scheduler window opens.

   On the **Data (Step 1)** tab
3. Enter a **name** for this job (up to 100 characters).
4. (**Optional**) Enter a **description** (up to 250 characters).
5. Select **Project Alerts** from the Notification Type drop-down list.
6. Select one or more **projects** for which this alert will apply.
7. Click the **Add** button to create the alert **rule** for the job. An Alert Rule window opens.
8. Using the **Notify when** drop-down list, **select a rule** and **enter/check** the appropriate trigger levels and options. See page 112 for detailed explanation of available rules.
9. Click **OK** to close the Alert Rule window.
10. (**Optional**) Click the **Add** button again to create additional rules for this job.
11. (**Optional**) To modify an existing alert rule, select the rule and click the **Edit** button.
12. (**Optional**) Modify the text shown in the e-mail by clicking on the **Change Notification Text...** link. See page 124 for details on editing the e-mail text.

Notes:
- Project Alert rules are only triggered on **approved** time and expense entry data. Time and expenses not submitted or yet to be approved are excluded.
- When multiple rules are created for one project alert job (step 10 above) and more than one rule has been reached at the job's Run time, then only one e-mail is sent containing the relevant information on all the triggered rules.

On the **Recipients (Step 2)** tab

13. From the Employees available list box, select the **employees** that are **to be notified** and move them to the Employees selected list box using the **Move** button.

Note: Only employees with e-mail addresses entered in their property windows are displayed in the lists.

On the **SMTP (Step 3)** tab

14. Verify (or enter) the **SMTP server**, the **SMTP port** and **Reply address** information. Optionally check the **Use SMTP Authentication** box for secure SMTP communications. The default information displayed is established in the Database Options view's Notifications tab.

On the **Schedule (Step 4)** tab

15. Set the **Run** schedule properties.
    - **Once** at a specified date and time
    - **Daily** at a specified time
    - **Weekly** on a particular day at a specific time
    - **Monthly** at a specific day and time

Note: For customers using DOVICO's Hosted services, all run times are based on the US Central Time zone. This means if a job is set to run at 23:00, it will be run at 23:00 U.S. Central Time, regardless of your native time zone.

16. Click **Done**. The Project Alert notification job is now displayed in the Job Scheduler's list of jobs.

Note: All time fields in the Job Scheduler must use the 24 hour format; 23:00 instead of 11:00 PM.

Project Alerts and Retriggering

As a general rule, an alert e-mail is sent only once. This stops an e-mail from being repeatedly sent once the trigger has been reached. However if the trigger levels are manually modified (by editing the '%' or 'cost' fields in the rule), then the trigger is reset and an e-mail is sent when the trigger level is reached.

There are circumstances when the alert's trigger will be reset automatically. These situations can occur when changes are made to budgets, actuals or any of the criteria which is used in the alert's calculation. When these changes cause the new calculation to be **below** the already triggered alert's targets, then an e-mail will be sent the next time the calculation exceeds the alert target.

Example:
A project alert is established to report when the project's actual hours have reached 75% of budgeted hours. At some point, the alert is triggered and an e-mail is sent.

The following Project Alert limits have been reached.

ACME-Web Design: Actual Hours have reached 75.00 % of budgeted hours.
Actual Hours: 282.00
Budgeted Hours: 360.00

The project manager decides to increase the project's scope and deliverables, and adds 100 hours to the budget. The new actual vs. budget calculation (282/460) is now below the 75% trigger level. As actual hours continue to grow against the project, the alert will be re-sent whenever the calculation reaches 75%.

Notes:

- As with the budgeted hours example described above, alerts may also be retriggered if actual hours, company costs, client costs, etc.. are edited in such a manner as to cause the calculation to be below the previously triggered event.
- For an automatic retrigger to successfully occur, the alert must go through at least one of its scheduled run times (Step 15 in the previous instructions) where the calculation remains below the alert's limit. This resets the alert's status flag.

  Example: An alert is scheduled to be run every Friday. Previously, the limit had been reached and the e-mail notice sent. If the budget is now modified on a Monday and the new value is reached by Thursday, then the e-mail notification will not be sent.

Project Alert rule details

The following details each of the available notification rules when creating Project Alerts (page 109).

DOVICO Timesheet's Project Alerts allow a project manager to set specific time, cost or expense targets for projects and automatically receive e-mails when targets have been reached. Project Alerts can be established to trigger on absolute values or on a relative percentage of a budget. Trigger categories include: budgeted hours, total hours, client costs, company costs, billable time and non-billable time.

Summary of Project Alert Notifications

Actual Hours
Be notified when a project's hours reach a set number of hours, a percentage above or below budgeted hours or a set number of hours above/below budgeted hours.

Actual Hours + ETC (Estimate Time to Complete)
Warn when the sum of a project's actual and ETC hours reach a set number of hours, a percentage above or below budgeted hours or a set number of hours above/below budgeted hours.

Company Costs
Warn when a project's company cost reaches a set value, a percentage above or below budgeted costs or a set amount above/below budgeted costs.

Client Costs
Warn when a project's client cost reaches a set value, a percentage above or below budgeted costs or a set amount above or below budgeted costs.

Expenses
Warn when a project's expense cost (company expenses) reaches a set value.

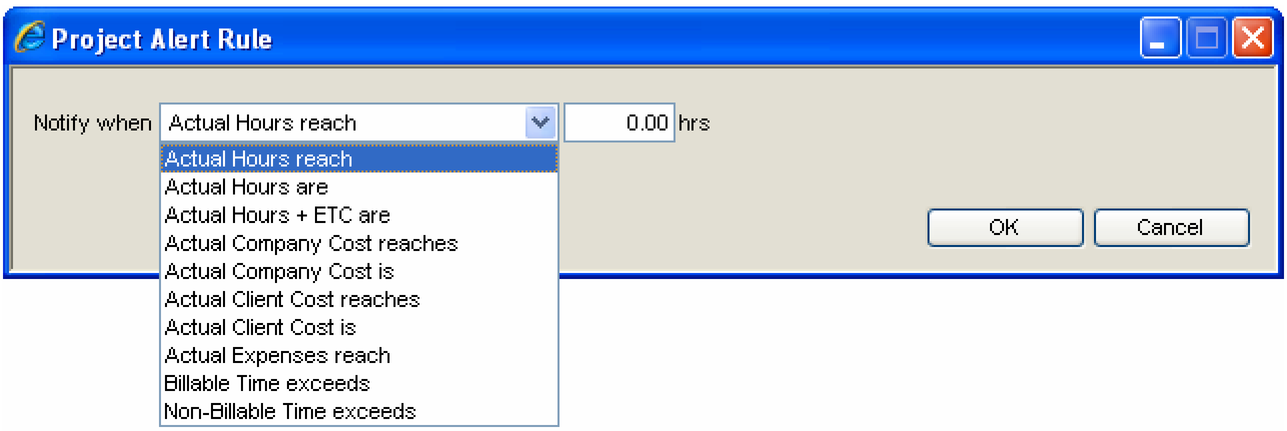
Billable / Non-Billable Time
Warn when a project's billable/non-billable time reaches a set value or a percentage above the project's total time.

The following details each of the 24 available alert notification options. Because reviewing all the options can be lengthy, and their usefulness not always apparent, here is a short list of common monitoring usages that may help you locate the particular rule required.

Common Uses

Notify when within 40 hours of reaching budgeted hours	Use Actual Hours are, Option #3, page 114
Notify when the total time already spent plus any remaining work is over budget	Use Actual Hours + ETC are, Option #4, page 115
Notify when the company costs for a project exceeds $15,000	Use Actual Company Cost reaches, page 117
Notify when time goes over budget by 10%	Use Actual Hours are, Option #2, page 114
Notify when reaching 85% of budgeted hours	Use Actual Hours are, Option #1, page 114
Notify when a project's non-billable time is greater than 30% of the project's total time	Use Non-Billable Time exceeds, Option #1, page 119
Notify when company expenses are greater than $22,500	Use Actual Expenses reach, page 117

Full List of Alert Notifications



Actual Hours reach …

Used to monitor the number of actual hours (submitted and approved) for one or more projects.

For the selected projects, when **actual hours** are **equal to** (or greater than) a specified number of hours, an e-mail notification is sent to the selected recipients.

Sample Rule	Actual Hours reach 120.00 hours
Rule Trigger	At the next scheduled run time, this rule will be triggered if the project's total number of actual hours is equal or greater than 120 hours. Actual Hours ≥ 120.00
Sample E-mail content	ACME - Web Design: Actual Hours have reached 120 hours. Actual Hours: 130

Actual Hours are ...
Used to monitor actual hours against budgeted hours for one or more projects.

For the selected projects, when actual hours reach a defined quantity; either a specific number of budgeted hours or a percentage of the total budgeted hours, an e-mail notification is sent to the selected recipients.

Note: Budgeted hours are established using the Budgeted Time & Costs view (page 83).

Option 1: To be notified when a project's **actual hours reach** (equal or greater than) a specified **percentage of** the total **budgeted hours**.

Sample Rule	Actual Hours are 75.00% of Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if the total number of Actual hours has reached or exceeded 75% of the project's budgeted hours. (Actual Hours / Budgeted hours) ≥ 0.75
Sample E-mail content	ACME - Web Design: Actual Hours have reached 75% of budgeted hours. Actual Hours: 300 Budgeted Hours: 360

Option 2: To be notified when a project's **actual hours exceed** the total **budgeted hours** by a specified percentage.

Sample Rule	Actual Hours are 10.00% Over Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if the total number of actual hours is 10% (or more) above the project's budgeted hours. (Actual Hours / Budgeted hours) ≥ 1.10
Sample E-mail content	ACME - Web Design: Actual Hours have reached 10.00% over budgeted hours. Actual Hours: 420 Budgeted Hours: 360

Option 3: To be notified when **actual hours** are **within** (equal or less than) the **budgeted hours** by a specified **number of hours**.

Sample Rule	Actual Hours are 25.00 hours Under Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if the total number of actual hours is within 25 hours of the project's total budgeted hours. (Budgeted Hours - Actual Hours) ≤ 25.00
Sample E-mail content	ACME - Web Design: Actual Hours have reached 25 hours under budgeted hours. Actual Hours: 340 Budgeted Hours: 360

Option 4: To be notified when a project's **actual hours exceed** the total **budgeted hours** by a specified **number of hours**.

Sample Rule	Actual Hours are 15.00 hours Over Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if the total number of actual hours is 15 hours (or more) above the project's total budgeted hours. (Actual Hours - Budgeted hours) ≥ 15.00
Sample E-mail content	ACME - Web Design: Actual Hours have reached 15 hours over budgeted hours. Actual Hours: 390 Budgeted Hours: 360

Actual Hours + ETC are ...

Used to monitor actual + ETC hours against budgeted hours for one or more projects.

For the selected projects, when the sum of actual hours and ETC hours reach a defined quantity; either a specific number of hours or a percentage of the total budgeted hours, an e-mail notification is sent to the selected recipients.

Notes:

- Budgeted hours are established using the Budgeted Time & Costs view (page 83).
- ETCs values are entered by employees using the time entry tool.

Option 1: To be notified when the sum of a project's **actual and ETC hours reaches** (equal or greater than) a specified **percentage** of the total **budgeted hours**.

Sample Rule	Actual Hours + ETC are 90.00% of Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if the sum of actual and ETC hours has reached or exceeded 90% of the project's budgeted hours. ((Actual Hours + ETC) / Budgeted hours) ≥ 0.90
Sample E-mail content	ACME - Web Design: Actual Hours +ETC have reached 90% of budgeted hours. Actual Hours: 300 ETC: 40 Budgeted Hours: 360

Option 2: To be notified when the sum of a project's **actual and ETC hours exceeds** the total **budgeted hours** by a specified percentage.

Sample Rule	Actual Hours + ETC are 10.00% Over Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if the sum of the actual hours and ETC is 10% (or more) above the project's total budgeted hours. ((Actual Hours + ETC) / Budgeted hours) ≥ 1.10
Sample E-mail content	ACME - Web Design: Actual Hours +ETC have reached 10% over budgeted hours. Actual Hours: 340 ETC: 75 Budgeted Hours: 360

Option 3: To be notified when the sum of a project's **actual and ETC hours** is **within** (equal or less than) the total **budgeted hours** by a specified **number of hours**.

Sample Rule	Actual Hours + ETC are 10.00 hours Under Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if the sum of actual hours and ETC is within 10 hours of the project's total budgeted hours. (Budgeted Hours – (Actual Hours + ETC)) ≤ 10.00
Sample E-mail content	ACME - Web Design: Actual Hours + ETC have reached 10.00 hours under budgeted hours. Actual Hours: 300 ETC: 55 Budgeted Hours: 360

Option 4: To be notified when the sum of a project's **actual and ETC hours exceeds** the total **budgeted hours** by a specified **number of hours**.

Sample Rule	Actual Hours + ETC are 15.00 hours Over Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if the sum of actual hours and ETC is 15 hours (or more) above the project's total budgeted hours. ((Actual Hours + ETC) - Budgeted hours) ≥ 15.00
Sample E-mail content	ACME - Web Design: Actual Hours +ETC have reached 15.00 hours over budgeted hours. Actual Hours: 330 ETC: 50 Budgeted Hours: 360

Actual Company Cost is ...
Used to monitor actual company costs against budgeted company costs for one or more projects.

For the selected projects, when actual company costs reach a defined quantity; either a specific value or a percentage of the total budgeted company costs, an e-mail notification is sent to the selected recipients.

Notes:

- Actual company costs are calculated based on each approved time entry. See company cost calculation details (page 90).
- Budgeted company costs are established using the Budgeted Time & Costs view (page 83).

Option 1: To be notified when a project's **actual company cost reaches** (equal or greater than) a specified **percentage** of the total **budgeted company costs**.

Sample Rule	Actual Company Cost is 75.00% of Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if actual company costs have reached or exceeded 75% of the project's budgeted company costs. (Actual company costs / Budgeted company costs) ≥ 0.75
Sample E-mail content	ACME - Web Design: Actual Company Cost has reached 75.00% of budgeted company costs. Actual Company Cost: $13,000 Budgeted Company Cost: $15,000

Option 2: To be notified when a project's **actual company cost exceeds** the total **budgeted company cost** by a specified **percentage**.

Sample Rule	Actual Company Cost is 10.00% Over Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if actual company cost is 10% (or more) above the project's budgeted company cost. (Actual company costs / Budgeted company costs) ≥ 1.10
Sample E-mail content	ACME - Web Design: Actual Company Cost has reached 10.00% over budgeted company costs. Actual Company Cost: $18,500 Budgeted Company Cost: $15,000

Option 3: To be notified when the **actual Company cost** is **within** (equal or less than) the **budgeted company cost** by a specified value.

Sample Rule	Actual Company Cost is $1,000 Under Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if actual company costs are within $1,000 of the project's total Budgeted cost. (Budgeted company costs – Actual company costs) ≤ 1000.00
Sample E-mail content	ACME - Web Design: Actual Company Cost has reached $1,000 under budgeted company costs. Actual Company Cost: $14,500 Budgeted Company Cost: $15,000

Option 4: To be notified when a project's **actual company cost exceeds** the total **budgeted company cost** by a specified value.

Sample Rule	Actual Company Cost is $1,500 Over Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if actual company costs are $1,500 (or more) above the budgeted company costs. (Actual company costs - Budgeted company costs) ≥ 1500.00
Sample E-mail content	ACME - Web Design: Actual Company Cost has reached $1,500 over budgeted company costs. Actual Company Cost: $16,750 Budgeted Company Cost: $15,000

Actual Company Cost reaches ...
Used to monitor actual company costs for one or more projects.

For the selected projects, when **actual company cost** is **equal to** (or greater than) a specified value, an e-mail notification is sent to the selected recipients.

> **Note:** Actual company costs are calculated based on rates applied to each approved time entry. See company cost calculation details (page 90).

Sample Rule	Actual Company Cost reaches $25,000
Rule Trigger	At the next scheduled run time, this rule will be triggered if the project's company costs are equal or greater than $25,000. Actual company costs ≥ 25000.00
Sample E-mail content	ACME - Web Design: Actual Company Cost has reached $25,000. Actual Company Cost: $26,367

Actual Client Cost reaches ...
Used to monitor actual client costs for one or more projects.

For the selected projects, when **actual client cost** is **equal to** (or greater than) a specified value, an e-mail notification is sent to the selected recipients.

> **Note:** Actual client costs are calculated based on rates applied to each approved time entry. See client cost calculation details (page 90).

Sample Rule	Actual Client Cost reaches $30,000
Rule Trigger	At the next scheduled run time, this rule will be triggered if the project's client costs are equal or greater than $30,000. Actual client costs ≥ 30000.00
Sample E-mail content	ACME - Web Design: Actual Client Cost has reached $30,000 Actual Client Cost: $32,100

Actual Expenses reach ...
Used to monitor actual company expenses for one or more projects.

For the selected projects, when **actual company expenses** are **equal to** (or greater than) a specified value, an e-mail notification is sent to the selected recipients. Note that there is no alert based on client expenses.

Sample Rule	Actual Expenses reach $1,750
Rule Trigger	At the next scheduled run time, this rule will be triggered if the project's actual company expenses are equal or greater than $1,750. Actual expenses ≥ 1750.00
Sample E-mail content	ACME - Web Design: Actual Expenses have reached $1,750 Actual Expense: $1,950

Actual Client Cost is ...
Used to monitor actual client costs against budgeted client costs for one or more projects.

For the selected projects, when actual client costs reach a defined quantity; either a specific value or percentage of the budgeted client costs, an e-mail notification is sent to the selected recipients.

Notes:

- Actual client costs are calculated based on each approved time entry. See client cost calculation details (page 90).
- Budgeted client costs are established using the Budgeted Time & Costs view (page 83).

Option 1: To be notified when a project's **actual client cost reaches** (equal or greater than) a specified **percentage of** the total **budgeted client costs**.

Sample Rule	Actual Client Cost is 75.00% of Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if actual client costs have reached or exceeded 75% of the project's budgeted client costs. (Actual client costs / Budgeted client costs) ≥ 0.75
Sample E-mail content	ACME - Web Design: Actual Client Cost has reached 75.00% of budgeted Client costs. Actual Client Cost: $13,000 Budgeted Client Cost: $15,000

Option 2: To be notified when a project's **actual client cost exceeds** the total **budgeted client cost** by a specified **percentage**.

Sample Rule	Actual Client Cost is 10.00% Over Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if the total actual client cost is 10% (or more) above the project's budgeted client cost. (Actual client costs / Budgeted client costs) ≥ 1.10
Sample E-mail content	ACME - Web Design: Actual Client Cost has reached 10.00% over budgeted Client costs. Actual Client Cost: $18,500 Budgeted Client Cost: $15,000

Option 3: To be notified when the **actual client cost** is **within** (equal or less than) the **budgeted client cost** by a specified value.

Sample Rule	Actual Client Cost is $1,000 Under Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if the actual client cost are within $1,000 of the project's total Budgeted cost. (Budgeted client costs – Actual client costs) ≤ 1000.00
Sample E-mail content	ACME - Web Design: Actual Client Cost has reached $1,000 under budgeted Client costs. Actual Client Cost: $14,500 Budgeted Client Cost: $15,100

Option 4: To be notified when a project's **actual client cost exceeds** the total **budgeted client cost** by a specified value.

Sample Rule	Actual Client Cost is $1,500 Over Budget
Rule Trigger	At the next scheduled run time, this rule will be triggered if actual client costs are $1,500 (or more) above the budgeted client costs. (Actual client costs - Budgeted client costs) ≥ 1500.00
Sample E-mail content	ACME - Web Design: Actual Client Cost has reached $1,500 over budgeted Client costs. Actual Client Cost: $16,750 Budgeted Client Cost: $15,000

Billable Time exceeds ...
Used to monitor billable time for one or more projects.

For the selected projects, when billable time reaches a defined quantity; either a specific number of hours or a percentage of total time, an e-mail notification is sent to the selected recipients.

Option 1: To be notified when a project's **billable time exceeds** the **total time** by a specified percentage.

Sample Rule	Billable time exceeds 75.00% of Total time
Rule Trigger	At the next scheduled run time, this rule will be triggered if billable hours represent 75% (or more) of the project's total time. (Billable time / Total time) ≥ 0.75
Sample E-mail content	ACME - Web Design: Billable time has reached 75.00% of the Total time. Billable Time: 515 Total Time: 610

Option 2: To be notified when a project's **billable time** is **equal to** (or greater than) a specified **number of hours**.

Sample Rule	Billable time exceeds 300.00 hours
Rule Trigger	At the next scheduled run time, this rule will be triggered if a project's billable hours are equal or greater than 300 hours. Billable time ≥ 300.00
Sample E-mail content	ACME - Web Design: Billable time has reached 300 hours. Billable Time: 320

Non-Billable Time exceeds ...
Used to monitor non-billable time for one or more projects.

For the selected projects, when non-billable time reaches a defined quantity; either a specific number of hours or a percentage of the total time, an e-mail notification is sent to the selected recipients.

Option 1: To be notified when a project's **non-billable time exceeds** the **total time** by a specified percentage.

Sample Rule	Non-Billable time exceeds 30.00% of Total time
Rule Trigger	At the next scheduled run time, this rule will be triggered if non-billable hours represent 30% (or more) of the project's total time. (Non-Billable time / Total time) ≥ 0.30
Sample E-mail content	ACME - Web Design: Non-Billable time has reached 30.00% of the Total time. Non-Billable Time: 300 Total Time: 610

Option 2: To be notified when a project's **non-billable time** is **equal to** (or greater than) a specified **number of hours**.

Sample Rule	Non-Billable time exceeds 100.00 hours
Rule Trigger	At the next scheduled run time, this rule will be triggered if a project's non-billable hours are equal or greater than 100 hours. Non-Billable time ≥ 100.00
Sample E-mail content	ACME - Web Design: Non-Billable time has reached 100 hours. Non-Billable Time: 120

Custom E-mail Notifications

The Job Scheduler's **Custom E-mail Notification** feature provides the ability to send custom e-mails to the selected users.

To schedule a custom e-mail notification:

1. Click the **Job Scheduler** button located in the Tools section of the side navigation bar.
2. Select **Notification** from the drop-down list at the top left corner of the screen. If Notification was previously selected, then click the **New** button on the toolbar.

   The Job Scheduler window opens.

   On the **Data (Step 1)** tab
3. Enter a **Name** for this job (up to 100 characters). This is the name that will appear in the e-mail's subject line.
4. (**Optional**) Enter a **description** (up to 250 characters).
5. Select **Custom Email Notification** from the Notification Type drop-down list.
6. **Type** the e-mail message in the **Notification Text** area. Use **HTML tags**, such as
 to add a line break, to properly format the message.

   On the **Recipients (Step 2)** tab
7. From the Employees available list, select the **employees** that are **to be notified** and move them to the Employees selected list using the **Move** button.

   Note: Only employees with e-mail addresses entered in their property windows are displayed in the lists.

   On the **SMTP (Step 3)** tab
8. Verify (or enter) the **SMTP server**, the **SMTP port** and **Reply address** information. Optionally check the **Use SMTP Authentication** box for secure SMTP communications. The default information displayed is established in the Database Options view's **Notifications** tab.

   On the **Schedule (Step 4)** tab
9. Set the **Run** schedule properties.
   - **Once** at a specified date and time
   - **Daily** at a specified time
   - **Weekly** on a particular day at a specific time
   - **Monthly** at a specific day and time

   Note: For customers using DOVICO's Hosted services, all run times are based on the US Central Time zone. This means if a job is set to run at 23:00, it will be run at 23:00 U.S. Central Time, regardless of your native time zone.
10. Click **Done**. The notification job is now displayed in the Job Scheduler's list of jobs.

Note: All time fields in the Job Scheduler must use the 24 hour format; 23:00 instead of 11:00 PM.

Tip: It's a good practice to set automated job run times when the system demands are low (evenings, overnight or other non-peak times).

Database Maintenance

The Job Scheduler's **Data Maintenance** feature provides the ability to create an automatic and scheduled Backup or Reindex of the database.

Note: The Database Maintenance option is not available with DOVICO Timesheet's Hosted Online solution.

To create a Data Maintenance job:

1. Click the **Job Scheduler** button located in the Tools section of the side navigation bar.
2. Select **Data Maintenance** from the drop-down list at the top left corner of the screen. If Data Maintenance was previously selected, then click the **New** button on the toolbar.

   The Job Scheduler window opens.

   On the **Data (Step 1)** tab
3. Enter a **name** for this database maintenance job (up to 100 characters).
4. (**Optional**) Enter a **description** (up to 250 characters).
5. Select which Data Maintenance function to automate.
   - The **Reindex Database** option ensures that the database is properly indexed, which in turn enables DOVICO Timesheet to run faster.
   - The **Backup Database** option ensures that the selected database is backed up on a regular basis.

     Enter the **destination folder path** where the database files are to be backed up.

   On the **Schedule (Step 2)** tab
6. Set the **Run** schedule properties.
   - **Once** at a specified date and time
   - **Daily** at a specified time
   - **Weekly** on a particular day at a specific time
   - **Monthly** at a specific day and time
7. Click **Done**. The database maintenance job is now displayed in the Job Scheduler's list of jobs.

Notes:
- When a database backup occurs, any users logged into DOVICO Timesheet will be automatically logged off.
- All time fields in the Job Scheduler use the 24 hour format; 23:00 instead of 11:00 PM.
- For a Backup Database to be successfully performed, the database's mdf and ldf files must be located under the directory where DOVICO Timesheet is installed.

Tip: It is recommended that all database backup jobs be set to run during off-hours when the database is not being accessed.

Automatic Reporting

The Job Scheduler's **Automatic Reporting** feature provides the ability to have reports automatically created and e-mailed to employees and clients on a one-time or recurring basis. Reports can be e-mailed in PDF, Word, Excel, RTF or CSV formats.

To create an automatic reporting job:

1. Click the **Job Scheduler** button located in the Tools section of the side navigation bar.
2. Select **Reporting** from the drop-down list at the top left corner of the screen. If Reporting was previously selected, then click the **New** button on the toolbar.

   The Job Scheduler window opens.

   On the **Data (Step 1)** tab
3. Enter a **name** for this reporting job (up to 100 characters). This is the name that will appear in the e-mail's subject line.
4. (**Optional**) Enter a **description** (up to 250 characters).
5. To the right of the **Reports to be sent** list, click the **Add** button to add a report to the list.

   Clicking the Add button launches a procedure similar to that used in the Reports Explorer view. **Locate** and **double click** on the report and select the **reporting parameters** as required.

   > **Note:** If the **Filter by Date range** option is used when selecting report parameters, this date range will **automatically advance** for reporting jobs scheduled to run daily, weekly or monthly. Example: If you select a 7 day range (Monday, May 1 to Sunday, May 7) using the Filter by Date Range option and you schedule the report to run weekly, the first weekly report will include data from May 1 to May 7, the next weekly report will include data from May 8 to May 14, etc.

6. When the report is displayed, select a **report format** in the Export format drop-down list (default PDF).
7. (**Optional**) When reports contain client or company costing information, options to hide the cost information in the final output are made available - at the top of the PDF viewer. Select whether to show/hide cost information from the report by selecting the applicable checkboxes. These options are made available for those occasions where the report is being e-mailed/distributed to individuals who should not have access to client or company cost information.
8. Click the **Add to report job** button located near the top of the print preview screen.

   The report is now displayed in the list of Reports to be sent.
9. (**Optional**) You can **remove**, **edit** or **preview** any report displayed in the Reports to be sent list by clicking the appropriate buttons to the right of the list.
10. Add additional reports as required (step 5).
11. (**Optional**) Modify the text shown in the e-mail by clicking on the **Change Notification Text...** link (page 124).

    On the **Recipients (Step 2)** tab
12. From the lists displayed on the left, select the **employees** or **clients** that will receive the e-mailed reports and move them to the Employees or Clients selected lists using the **Move** button.

    > **Note:** Only employees and clients with e-mail addresses entered in their respective properties windows are displayed in the lists.

On the **SMTP (Step 3)** tab

13. Verify (or enter) the **SMTP server**, the **SMTP port** and **Reply address** information. Optionally check the **Use SMTP Authentication** box for secure SMTP communications. The default information displayed for these fields is established in the Database Options view's **Notifications** tab.

On the **Schedule (Step 4)** tab

14. Set the **Run** schedule properties.

- **Once** at a specified date and time
- **Daily** at a specified time
- **Weekly** on a particular day at a specific time
- **Monthly** at a specific day and time

Note: For customers using DOVICO's Hosted services, all run times are based on the US Central Time zone. This means if a job is set to run at 23:00, it will be run at 23:00 U.S. Central Time, regardless of your native time zone.

Tip: It's a good practice to set automated job run times when the system demands are low (evenings, overnight or other non-peak times).

15. Click **Done**. The reporting job is now displayed in the Job Scheduler's list of jobs.

Note: All time fields in the Job Scheduler must use the 24 hour format; that is 23:00 instead of 11:00 PM.

Changing E-Mail / Notification Text

For most types of e-mail notifications, some changes can be made to the text displayed in the subject line or body of the e-mail. With this ability to apply modifications to all, or to only specific notifications, you can customize each e-mail to fit your requirements.

To change the text in a notification e-mail:

Changes can be applied to new or existing notifications created in the Job Scheduler or to notifications applied from the Employee properties window.

1. Locate the notification to modify and click the **Change Notification text** link.
2. Modify the text in the **Subject line** and in the **Body** as required. The tags used in the subject line and body cannot be edited. Additional tags cannot be added, but existing tags can be removed.
3. Click the **Preview** button to see the applied changes.

    Notes:
    - Project names, date ranges, data tables, etc displayed in the Preview **may use demo data**.
    - Pressing the **Restore Defaults** button will remove all applied changes and restore the Subject line, Body text and tags to their default settings.
    - Basic HTML formatting tags, such as `<br>` to add a line break, can be used to format the message.

4. By default, the newly modified text will only be applied to this particular notification job. It can be applied to all additional and/or existing notification jobs by selecting either of the available checkboxes.
    - **Make this the default text for "same type" notifications**: Use this option to apply the text changes to all additional notification jobs of the same type. That is, if you are modifying a 'Time Awaiting Approval' notification, then all additional 'Time Awaiting Approval' notification jobs will use this as the template.
    - **Make this the default text for all existing "same type" notification jobs**: Use this option to apply the text changes to all existing notification jobs of the same type.
5. Click the **Save** button to apply the changes.

Tag information:

Time / Expenses Awaiting Approval Notification
$SHEET_TYPE: The type of sheets waiting for approval: Timesheets and/or Expense sheets.
$SHEETS_AWAITING_APPROVAL: A table identifying the sheets awaiting approval.

Timesheet for Approval – Instant Notification
$EMPLOYEE_LAST: The last name of the employee whose timesheet needs to be approved.
$EMPLOYEE_FIRST: The first name of the employee whose timesheet needs to be approved.
$SHEET_NAME: The name of the sheet which requires approval.

Expense Sheet for Approval – Instant Notification
$TERM_EXPENSE: Custom terminology for the word 'expense'.
$EMPLOYEE_LAST: The last name of the employee whose expense sheet needs to be approved.
$EMPLOYEE_FIRST: The first name of the employee whose expense sheet needs to be approved.
$SHEET_NAME: The name of the sheet which requires approval.

Rejected time/Expenses – Instant Notification
$REJECTED_TYPE: The type of sheet that was rejected: Time or Expense sheet.
$DATE_RANGE_START: The rejected sheet's start date.
$DATE_RANGE_FINISH: The rejected sheet's finish date.
$MANAGER_LAST: The last name of the manager who rejected the sheet.
$MANAGER_FIRST: The first name of the manager who rejected the sheet.
$SHEET_NAME: The name of the rejected sheet.
$REJECTED_REASON: The reason for rejection as entered by the manager.

Project Alerts
$TERM_PROJECT: Custom terminology for the word 'project'.
$THRESHOLD_LIMIT_INFO: List of the project alert rule(s) that have been reached along with limited details on the rule.
$JOB_NAME: The text entered in the job's Name field.

Employee Incomplete Timesheet Notification
$DATE_RANGE_START: The reporting period's start date.
$DATE_RANGE_FINISH: The reporting period's finish date.
$INCOMPLETE_INFO: A table showing summary timesheet information for the reporting period.

Manager Incomplete Timesheet Notification
$TERM_EMPLOYEES: Custom terminology for the word 'employees'.
$DATE_RANGE_START: The reporting period's start date.
$DATE_RANGE_FINISH: The reporting period's finish date.
$INCOMPLETE_SHEETS: A summary table indicating which employees may have incomplete timesheets.

Reporting Notification
$JOB_NAME: The text entered in the job's Name field.
$ATTACHMENTS: A list of all files attached to the e-mail.

Assignment Notification
$EMPLOYEE_LAST: The last name of the employee being notified of his/her assignments by e-mail.
$EMPLOYEE_FIRST: The first name of the employee being notified of his/her assignments by e-mail.
$DATE_RANGE_START: The reporting period's start date.
$DATE_RANGE_FINISH: The reporting period's finish date.
$ASSIGNMENTS: A table showing the assignments for the employee.

Billing

Billing functionality in DOVICO Timesheet permits invoices to be created based on fixed costs or on actual time and expenses.

Functionality includes ability to review, edit and include/exclude individual entries from an invoice, add payments to invoices, and the ability to apply tax rates for time or expenses by client.

If using a different application to create invoices, DOVICO Timesheet includes QuickBooks Link: A built-in utility capable of sending time entries to QuickBooks (page 201). For other applications, the Import/Export tool (page 218) is able to export time and expense entries from the DOVICO Timesheet database in character separated, fixed width, HTML or XML formats.

In Billing ...

Billing

The **Billing** view is used to create invoices and to add payments to invoices.

Invoices can be created based on actual time and expense entries or by fixed cost.

- When you create invoices for projects that are billed according to **actual hours** (or estimated hours), the invoice will be prepared based on time and expense entries made by employees. Invoices can include all or selected time and expense entries.
- When you create invoices for projects that are billed according to a **fixed amount**, the invoice will be prepared based on the total amount entered in the Projects view. You must include applicable taxes in the amount entered.

The following describes how to (1) create an invoice based on actual time and expenses, (2) how to create an invoice based on a fixed cost, (3) how to add (or edit) a payment against an invoice.

Prerequisite:

- Before you can print an invoice for a project, that **project** must be associated to a **client** and that client must be associated with a **region** (for tax purposes).

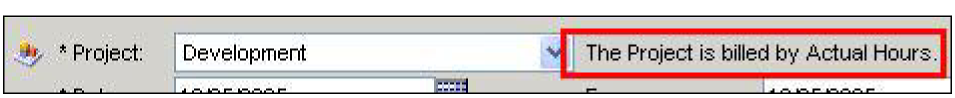
To create an invoice based on actual time and expenses:

Prerequisite:

- Before creating an invoice based on actual time and expenses, you must first make sure that the project's **Billing by status** (page 27) is set to **Actual Hours** or **Estimated Hours**. The 'Billing by' status is established in each project's properties window (page 26).

> **Note:** Whether the **Billing by** status is set to **Actual** or **Estimated** hours, the invoice created will be based on actual hours.

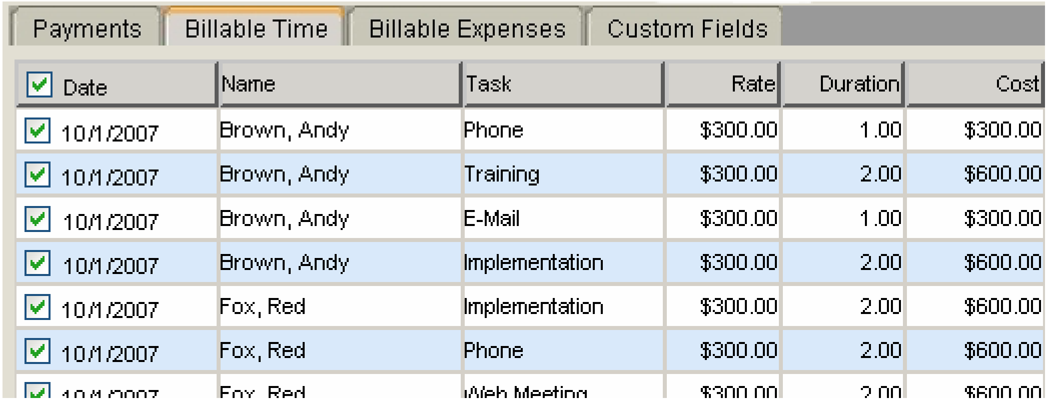
1. Click the **Billing** button in the Rates & Billing section on the side navigation bar.
2. Click the **New** button on the top toolbar.
3. Select the **project** from the drop-down list. Once you have selected the project, the text displayed next to the project name should indicate either "The Project is billed by Actual Hours" or "The Project is billed by Estimated Hours" depending on the project's billing status. If not, review the selected project's Billing by status.



4. Select the invoice **date**.
5. (**Optionally**) Enter an invoice **number**.
6. Select the invoice's **From** and **To** dates. These dates establish the period from which approved and billable time and expense entries are made available for invoicing.
7. Click the **Refresh** button to accumulate all time and expenses within the From and To dates.
8. Click the **Billable Time** tab to review, select or un-select the time entries to include in the invoice.
9. Click the **Billable Expenses** tab to review, select or un-select the expenses to include in the invoice.

> **Note:** Time and expense entries not selected for invoicing are available if another invoice is created. However, once included in a posted invoice, they are no longer available for future invoicing.

> **Tip:** Use the checkbox located to the left of the Date column to check or un-check all items within the Billable Time tab.



Date	Name	Task	Rate	Duration	Cost
10/1/2007	Brown, Andy	Phone	$300.00	1.00	$300.00
10/1/2007	Brown, Andy	Training	$300.00	2.00	$600.00
10/1/2007	Brown, Andy	E-Mail	$300.00	1.00	$300.00
10/1/2007	Brown, Andy	Implementation	$300.00	2.00	$600.00
10/1/2007	Fox, Red	Implementation	$300.00	2.00	$600.00
10/1/2007	Fox, Red	Phone	$300.00	2.00	$600.00
10/1/2007	Fox, Red	Web Meeting	$300.00	2.00	$600.00

10. Click the **Update Owing** button to preview the amount to be invoiced (Amount owing).
11. Click **Save** .

> **Note:** The **Amount owing** total is the **sum** of all time and expense **costs** that have been selected **plus any taxes** applicable to the client **minus any payments** made against the invoice. A client's tax rates are established in the **region** assigned to the client.

12. (**Optional**) Click the **Description** button to enter a short paragraph detailing the invoice, the **contact person's name** in the Attention box, or any additional information in the **Extra 1** and **Extra 2** boxes. Click **OK**.
13. Click **Post** to post the invoice.
14. Click the **Print** button to view and print the invoice.

> **Warning:** If time or expense entries are modified or deleted after an invoice has been posted, these changes will be reflected in the invoice.

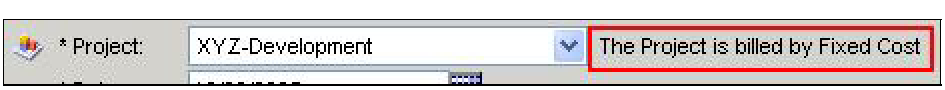
> **Tip:** Once an invoice has been posted, you cannot add any items to that invoice. However if additions are required, you can delete the original invoice and recreate it following the steps above.

To add an invoice based on a fixed amount:

Prerequisite:

- Before creating an invoice based on a fixed amount, you must first make sure that the project's **Billing by status** (page 27) is set to **Fixed Cost**.

1. Click the **Billing** button in the Rates & Billing section on the side navigation bar.
2. Click the **New** button on the top toolbar.
3. Select the **project** from the drop-down list. Once you have selected the project, the text displayed next to the project name should indicate: "The Project is billed by Fixed Cost". If not, review the selected project's Billing by status.



4. Select the invoice **date**.
5. (**Optional**) Enter an invoice **number**.
6. (**Optional**) Click the **Description** button to enter a short paragraph detailing the invoice, the **contact person's name** in the Attention box, or any additional information in the **Extra 1** and **Extra 2** boxes. Click **OK**.

7. Click the **Update Owing** button to review the Fixed Cost amount to be invoiced.
8. Click **Save** .

> **Note:** The **Amount owing** total is the fixed cost entered for this project **minus** any **payments** made against this invoice. It **does not** include **any taxes** applicable to the client.

9. Click **Post** to post the invoice.
10. Click the **Print** button to view and print the invoice.

To add a payment for an invoice:

1. Select the **invoice** from the list.
2. From the **Payments tab**, click the **New** button New at the bottom of the screen.
3. Select the payment **date**.
4. Enter the **amount** paid.
5. Enter the check or other reference number in the **Check Number** box.
6. Click **OK**.
7. Click the **Update Owing** button to recalculate the Amount owing value.

To edit a payment:

1. Select the **invoice** from the list.
2. From the **Payments tab**, select an existing **payment** and click the **Edit** button at the bottom of the screen. An Edit Payment window opens.
3. Edit as required and click **OK**.
4. Click the **Update Owing** button to recalculate the Amount owing value.

Notes:

- Your company name and mailing address displayed on invoices are retrieved from the data entered in the Database Options view's **Company Profile** tab.
- The client name and address displayed on the invoice is based on the information entered in the client's address tab (From the client properties window, click the Address tab and make certain there is only one address selected with Display = Yes).
- The number of invoices displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Tips:

- You can adjust project cost information before an invoice is created by using the **Actual Time & Costs** and **Actual Expenses** views.
- Use the **Show/Hide column** function to personalize what information is displayed in the Billing view's grid.
- You can add fields to track extra invoice information by using **Custom fields** .
- Use the **Filter** function to view only the invoices belonging to a specific project.
- Use the **Find** function to locate a specific invoice by **number**.

Regions

The **Regions** view is used to establish specific tax rates on labor and expenses for each region or place of business (country, state, province, county). When a region is specified for a client, tax rates entered in this view will apply when invoices are created. If client invoices are not created, there is no requirement to use the Regions view.

The regions created in this view are displayed as an optional selection when creating (or editing) a **client**. As a result, any client can be associated to any region.

To add a region:

1. Click the **Regions** button located in the Rates & Billing section of the side navigation bar.
2. Click the **New** button on the toolbar.
3. Enter a unique **name** for the region (up to 50 characters).
4. Enter a **Tax on labor rate** (as a percentage). This tax will be applied to billable time entries when an invoice is created.
5. Enter a **Tax on Expenses rate** (as a percentage). This tax will be applied to billable expenses when an invoice is created.
6. Click **Save**.

OPTIONAL INSTRUCTIONS:

7. Enter a **description** (up to 250 characters).
8. Check the **Hide** box if you want to hide this region from lists when generating reports.
9. Check the **Flag for archive** box if you want to remove this region from the database the next time the Archive Database function is run.
10. Click **Save**.

Note: The number of regions displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Tips:

- You can add fields to track extra region information by using **Custom fields**.
- Additional tabs are available at the bottom of the view to add **Notes**, **Phone Numbers** and **Addresses**.

Expenses

Expenses can be a significant part of company and project costs and if not properly managed, can be a significant contributing factor in a project's cost overruns.

DOVICO Timesheet's administrative expense utilities are used by managers and administrators to add expenses for projects, to review approved expenses submitted by employees, and other functionality useful in tracking, grouping and reporting on expenses.

Employees (end-users) use the Expense Entry screen to **enter expenses** (page 258).

For information on entering **budgeted expenses**, go to page 99.

In Expenses ...

See page 62 for information on setting **approval workflows** for expenses.

Actual Expenses

The **Actual Expenses** view is used to add project expenses which are not normally submitted by employees and is also used to review approved expenses submitted by employees. The expenses displayed in the Actual Expenses view are used in various project, employee, and client expense reports. Using this view, you can also edit or reject expenses submitted by employees.

The following describes how to (1) add and (2) reject actual expenses.

Prerequisites:

- The **projects** and **employees** associated with expenses should first be established.
- If expenses can be grouped into logical categories (meals, rentals, etc), those **expense categories** should be created.
- To enter rate-based expenses such as mileage, **expense categories** must be created.
- If currency conversions are required when entering expenses, **currencies** should be established.

To add an expense:

1. Click the **Actual Expenses** button located in the Time & Expenses section of the side navigation bar.
2. Click the **New** button on the toolbar.
3. Select a **date** using the calendar button .
4. Select the **project** associated to this expense.
5. (**Optional**) Select an **expense category**.
6. Select the **employee** associated with this expense.
7. (**Optional**) Enter a **purchase order** number.
8. (**Optional**) Enter a **reference number**.
9. Enter the **amount** or **quantity** for the expense. The quantity and cost per unit fields are only available if the expense category selected in step 5 has been set up as a rate-based expense category. Edit the **cost per unit** value if required.
10. If applicable, check the **Request reimbursement** option.
11. Check the **billable** box if this expense is billable.
    a. If Billable is selected, optionally enter a **markup** as a percentage.
    b. If Billable is selected, optionally enter a **fixed** amount.
12. (**Optional**) Enter any applicable tax amounts in the **Value Added Tax** fields.
13. (**Optional**) Enter a **description** for the expense. This description is displayed on the Invoice used for billing.
14. Click **Save** .

Notes:

- Expenses entered by employees using the expense entry screen (page 258) are based on project "sheets". However once approved, the expense sheet is broken down into individual expenses. No trace of the "sheet" exists in the database once expenses submitted by employees are approved.
- Expenses entered in the Actual Expenses view will **bypass** all **approval processes**.
- The **default** setting displayed for the **Billable** checkbox changes depending on the project selected. The default setting for each project is configured at the project properties level.
- When **Billable** box is checked, the expense entry is available for invoicing using the Billing view.
- The number of expense rows displayed is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the page) to view otherl record pages.

Tips:

- Use the **Show/Hide column** function to personalize what information is displayed in the Actual Expenses view's grid.
- You can add fields to track extra expense information by using **Custom fields**.
- Use the **Find** function to locate a specific expense by **date**.
- Use the **Filter** function to view only the expenses belonging to a certain project, employee or expense category.
- Additional tabs are available at the bottom of the view to add **Notes**, **Phone Numbers** and **Addresses**.

To reject an expense:

1. Select the expense to reject and click the **Reject** button located on the toolbar.
2. Enter the **reason for rejection**. This reason is displayed to the employee who submitted the expense. The reason for rejection will also be displayed as a sheet name to the employee who submitted the expense.
3. Click **OK**.

Expense Categories

DOVICO Timesheet uses **Expense Categories** to group similar type expenses and to enter mileage - or other 'per unit' or 'rate based' expenses. Once expense categories are created, employees entering expenses can use these categories to better describe or categorize their expenses. Travel, meals, accommodations, and vehicle rentals are commonly used expense categories.

The expense categories are displayed as an optional selection for managers or administrators using the Budgeted Expenses and Actual Expenses views, and are displayed to employees entering expenses from the Expense entry screen.

To add an expense category:

1. Click the **Expense Category** button located in the Advanced section of the side navigation bar.
2. Click the **New** button on the toolbar.

   An **Expense Categories window** opens.
3. Enter a unique expense category **name** (up to 100 characters).
4. If the expense category is being created to track a rate based expense such as mileage then:
   a. Check the **Track as Quantity** checkbox.
   b. Enter the value for each unit in the **Cost Per Unit** field. Example: 0.45
   When editing a Cost per Unit value, a More button is displayed to offer more options (page 135). When creating a new expense category, this button can be ignored.
   c. Enter a **description** for the **Unit**. Example: per mile

   Using this example, when employees select this expense category from the expense entry tool, the number of miles entered will be multiplied by 0.45 to calculate the total for this expense entry.

Notes:

- The **Track as Quantity** checkbox cannot be modified after the Expenses Category is created.
- The combined expense category name, cost per unit value and unit description will be displayed to employees in the expense entry view's Expense Category drop-down list: Travel Mileage ($0.45 per mile).
- The term "Quantity" can also be customized to better fit your company's terminology. (page 159)

OPTIONAL INSTRUCTIONS:

5. Enter a **description** for the expense category (up to 250 characters).
6. Check the **Hide** box if you want to hide this expense category from lists when generating reports.
7. Check the **Flag for archive** box if you want to remove this expense category from the database the next time the Archive Database function is run.

Note: The number of expense categories displayed in the view is limited by the **Paging** setting (page 150).
You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Tips:

- Use the **Show/Hide column** function to personalize what information is displayed in the Expense Categories view's grid.
- You can add fields to track extra expense category information by using **Custom fields**.
- **Double click** an item in the grid to see that item's properties.

"More" button for changes to Cost per Unit

When an expense category's Cost per Unit value is changed (page 134), several options are available (via the **More** button) that determine what changes, if any, are applied to existing expense entries associated with the Expense Category.

How edited Cost per Unit values affect future expense entries:

When a Cost per Unit value is changed, the new value is automatically applied to all future expense entries using the Expense Category. The value is also applied to any applicable budgeted expenses.

Options for editing Cost per Unit values on approved expense entries:

When an expense category's Cost per Unit value is changed a "More" button appears next to the field. Clicking the More button offers 3 options that determine what changes, if any, are made to **approved expense entries** – associated with the Expense Category. The new value is automatically applied to future expense entries.

- **Do not replace existing values** (the default option when you do not click the More button): No changes are made to approved expense entries.
- **Replace last value only**: To find all values in approved expense entries that exactly match the previous value and replace it with the new value. This change will not affect values that do not match the previous value.
- **Replace all values from**: To find and replace all values, regardless of its previous value, in approved expense entries, from (and including) the selected date.

Currencies

The **Currencies** view is used to add currency conversion data available when entering expenses.

To successfully enter currencies you will need to enter your company's standard currency with a value of 1.0. Each foreign currency you enter will be converted based on your company's standard currency.

Examples:

If your company's standard currency is US, the conversion rates will be approximately as shown below:

US = 1.000
EUR = 0.834
CAD = 1.186

If your company's standard currency is the Euro, the conversion rates will be approximately as shown below:

EUR = 1.000
US = 1.198
CAD = 1.422

Tip: One source of information to keep your currency conversion rates up to date is the online conversion tool http://www.xe.net/ucc/.

To add a currency:

1. Click the **Currencies** button located in the Advanced section of the side navigation bar.
2. Click the **New** button on the toolbar.
3. Enter a unique currency **name** (i.e. US, Euro, CAD, etc… up to 50 characters).
4. Enter a **conversion rate**.
5. Click **Save**.

OPTIONAL INSTRUCTIONS:

6. Enter a **description** (up to 250 characters).
7. Check the **Hide** box if you want to hide this currency from lists when generating reports.
8. Check the **Flag for archive** box if you want to remove this currency from the database the next time the Archive Database function is run.
9. Click **Save**.

Notes:

- Editing or deleting a currency or currency conversion rate does not modify any existing expense entries.
- The number of currencies displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Time and Attendance

Time and Attendance functionality in DOVICO Timesheet allows a manager or system administrator to create the policies that determine how much, and how fast, employees can accrue vacation, sick leave, and other leave.

The ability to create rules for each type of employee and type of leave, to reset accrual dates and totals, provides the necessary functionality regardless of the complexity required by your company to track time off. Using a built-in report, a manager can easily review information detailing how much time off has been accrued and how much has been taken for each employee.

For individual employees, they can review their personal information on how much vacation, sick leave, etc. they have accrued and how much they have taken via a report in the time & expense entry tool.

In Time and Attendance …

Leave/Absences Rules

The **Leave/Absences Rules** view allows a manager or system administrator to create the policies that determine how much, and how fast, employees can accrue vacation, sick leave, and other leave. Each leave/absences rule consists of one or more sets of instructions (accrual rules). These leave/absences rules are then applied to employees.

An accrual rule can be based on actual time worked or based on elapsed time. Accrual rules permit employees and managers to see up-to-date accrued totals at any time.

The design flexibility of accrual rules permits simple and complex rules to be created. As a general statement, accrual rules are created for vacation and sick leave. Other uses include creating rules that accumulate leave for overtime, flextime, etc.

Accrual rules have 5 components which should be considered before any rule is created.

1. The frequency at which time is accrued: Accrue 1 hour for every week worked.
2. Whether time is accrued based on actual work or on elapsed time.
3. The task against which time is being accrued: Is time being accrued towards vacation, sick leave, flex time.
4. Whether time can be accrued against regular time, overtime, flex time, etc.
5. Any maximum level at which accruals should stop: Can only accrue 10 sick days per year.

As most companies base their vacation and sick leave policies on job descriptions or seniority, Leave/Absences rules are commonly created for each classification of employee.

Examples:

- Senior Management Leave/Absences rule:
    - Accrue 20 vacation days per year
    - Accrue 1 sick day per month
- Employed 1-2 years Leave/Absences rule:
    - Accrue 10 vacation days per year
    - Accrue 1 sick day per month
    - Accrue 1 vacation day for every 40 hours of overtime worked
- Employed 3-5 years Leave/Absences rule:
    - Accrue 15 vacation days per year
    - Accrue 1 sick day per month

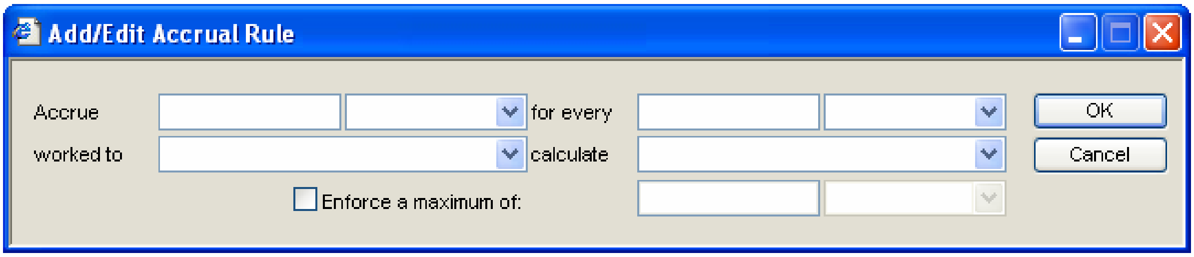
Prerequisites:

- Specific tasks for Leave/Absence rules (vacation, sick leave, etc) must be created. These specific tasks must be assigned to the Leave/Absences project and at least one employee must be assigned to each task.
- Accrual rules work in conjunction with the Leave/Absences project to track time against vacation, sick leave, holidays, etc. The Leave/Absences project cannot be deleted. The project can be renamed but should not be used for other purposes.

To add a new leave/absences rule:

1. Click the **Leave/Absences Rules** button  located in the Advanced section of the side navigation bar.
2. Click the **New** button.
3. Enter a unique leave/absences **name** (i.e. Senior Management rule, Employed 1-2 years rule, etc. up to 100 characters).
4. (**Optional**) Enter a **description** (up to 250 characters).

5. Click the **New** button located in the bottom part of the view.



6. Enter the **details** in the Add/Edit Accrual Rule window:

- **Accrue**: The number of **days**, **hours** or **%** of a day or hour, to be accrued after each period established in the "for every" field has passed.

  Examples:
  Accrue 1 hour after every 20 hours worked
  Accrue 1 hour after every 5 days worked
  Accrue 1 day after every 20 days worked
  Accrue 50 % (1/2 day) after every 30 days worked
  Accrue 25 % (1/4 hour) after every 50 hours worked

- **For every**: Establishes the period (frequency) at which the accrual is calculated.

  <u>Hours</u>: the employee will accrue the number of days, hours or % of a day or hour established in the Accrue field after every **xx hour of actual work** performed against any task.

  <u>Days</u>: the employee will accrue the number of days, hours or % of a day or hour established in the Accrue field after every **xx day of actual work** performed against any task. A day is defined as the number of working hours per day established in the employee profile.

  <u>Month</u>: The employee will accrue the number of days or hours established in the Accrue field for every **xx month elapsed since the Accrual Start date** and not against actual work.

  <u>Years</u>: The employee will accrue the number of days or hours established in the Accrue field for every **xx year elapsed since the Accrual Start date** and not against actual work.

Notes:

- Accrued time only occurs after the **full period** established in the "for every" field **has passed**. For example, if the rule is set to accrue 1 hour for every 10 hours worked, you will not accrue 0.5 hour after 5 hours worked nor accrue 0.75 hour after 7.5 hours worked, etc. For this reason, you should be cautious when selecting lengthy accrual periods such as every 6 months, or every 1 year.
- When accruing by month or year, you cannot set the 'for every' field to a fraction of a month or year. For example, 0.5 months, 1.75 months or 0.25 years, etc are not permitted.
- The **Accrual Start** date is initially set to the date that the Leave/Absences rule is assigned to the employee. For example, Joe accrues 1 sick day every month; if Joe's sick leave accrual was assigned to him on July 20th, then he earns 1 sick day on August 20th, then another day on September 20th, and so on,. The accrual start date can be modified using the Additional tab in the **employee's properties window**.

- **Worked to**: The task against which the time will be accrued (accrue vacation, sick leave, flex time, etc). The list of tasks shown in this drop-down list includes all tasks assigned to the Leave/Absences project.

- **Calculate**: Available only when the "for every" field is set to Hours or Days, this field determines the types of time entries which will use this accrual rule.

  <u>Regular Time Only</u>: The accrual will only occur when time entries are entered as regular time.

  <u>Overtime Only</u>: The accrual will only occur if time entries are entered as client overtime or company overtime.

Both Regular time and Overtime: The accrual will only occur when time entries are entered as regular time, company overtime or client overtime.

Flex Time Only: The accrual will only occur when flex time is used. Look for **Flex Time** in the help file's Index tab for instructions on setting up the software so employees can bank time.

Both Regular Time and Flex time: The accrual will only occur when time entries are entered as regular time or flex time.

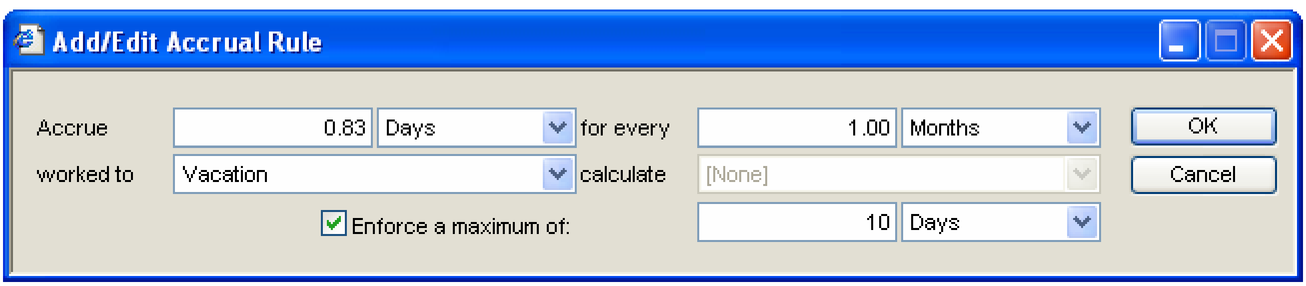
- **Enforce a maximum of**: Establishes the maximum number of hours or days that an employee can accrue.

7. Click **OK**.
8. Click **Save** .

The Accrual rule is now created and is available to be assigned to any or all employees by using the **Additional tab** in the Employee's properties window.

Example

The picture below shows a Vacation accrual rule permitting an employee to accrue 0.83 vacation days per month (10 days per year), to a maximum of 10 days.

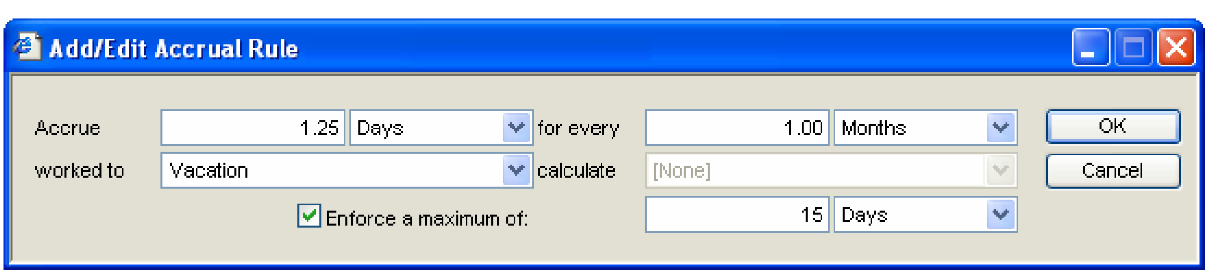


Note: The number of leave/absences rules displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Tip: If your company does not permit unused leave to be carried over from year to year, the best way to reset all unused accrued time is to use the **Update Employees Properties** view.

To edit a leave / absences accrual rule:

1. Select the **Leave / Absences rule** from the list at the top of the view.
2. Select an **accrual rule** from the list in the bottom pane.
3. Click the **Edit** button.



4. Edit the **details** for the Accrual Rule in the appropriate boxes (i.e. the picture above shows the Vacation accrual rule, shown previously, edited to reflect fifteen days vacation per year for an employee).
5. Click **OK**.
6. Click **Save** .

Accrual Rule From date

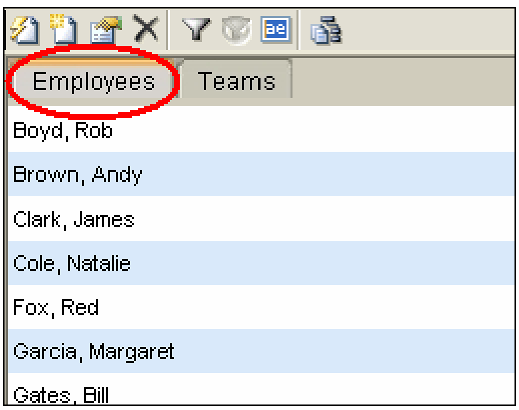
The **Accrue From date** is used to determine when the accrual calculation starts for a particular accrual rule. For example, if a rule starts on April 1, 2007, time recorded prior to this date will not be included in the calculation for available hours left (displayed in the Accrual Information box).

The default Accrue From Date for the rule is the day it was assigned to an employee. For example, if a rule is assigned to Juan on June 1, the Accrue From Date for Juan will be June 1. If the same rule is assigned to Mary on July 15, the Accrue From Date for Mary will be July 15.

To change the start date for an accrual rule:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.

   Verify that the Employees tab is selected in the employee list pane.



2. Select the **employee**.
3. Click the **Properties** button in the employee pane toolbar to open the properties window.
4. In the properties window, click the **Additional** tab located near the bottom of the window.
5. In the Accrual Information box, click the **rule** to modify to open the Accrual Adjustments window.
6. Edit the **Accrue From** date.
7. Click **OK** to close the Accrual Adjustments window.
8. Click **Done**.

Adjustment to an Accrual Rule

For any employee, an **adjustment** can be made to add, subtract or clear the number of hours in an accrual rule.

Example:
Joe accumulated 80 hours of vacation last year but only took 70. You have given him permission to carry over 10 hours into the new year starting January 1. You would therefore enter 10 in the Adjustment box for Joe and the Accrue From Date of January 1.

Notes:

- Only 1 adjustment can be made per employee. If a second adjustment is required, then this adjustment should be the total of the previous and new adjustments. Example; Joe had a previous adjustment of 10 hours. His manager has granted him 5 additional hours so the new adjustment must be set to 15.
- When an adjustment is made, it does not change the rule for other employees.

To adjust an accrual rule:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.

   Verify that the Employees tab is selected in the employee list pane.
2. Select the **Employee**.
3. Click the **Properties** button in the employee pane toolbar to open the properties window.
4. In the properties window, click the **Additional** tab located near the bottom of the window.
5. In the Accrual Information box, click the **rule** to modify to open the Accrual Adjustments window.
6. Enter the amount of hours in the **Adjustment** box.
7. Click **OK** to close the Accrual Adjustments window.
8. Click **Done**.

Customizing and Options

DOVICO Timesheet permits users with appropriate security settings to modify some functionality, preferences or information throughout the system.

System changes include adding custom fields, modifying terminology, configuring the time and expense entry screens and other general system parameters.

In Customizing and Options ...

Custom Field Templates

The **Custom Field Templates** view is used to create additional data fields permitting users to enter or track extra information when using the software.

Employees entering time or expenses can use custom fields to enter additional information as needed. Example: An employee requires a field to enter a reference number when fixing a software bug, or an employee is required to select (from a list) a product name when tracking time on a support call.

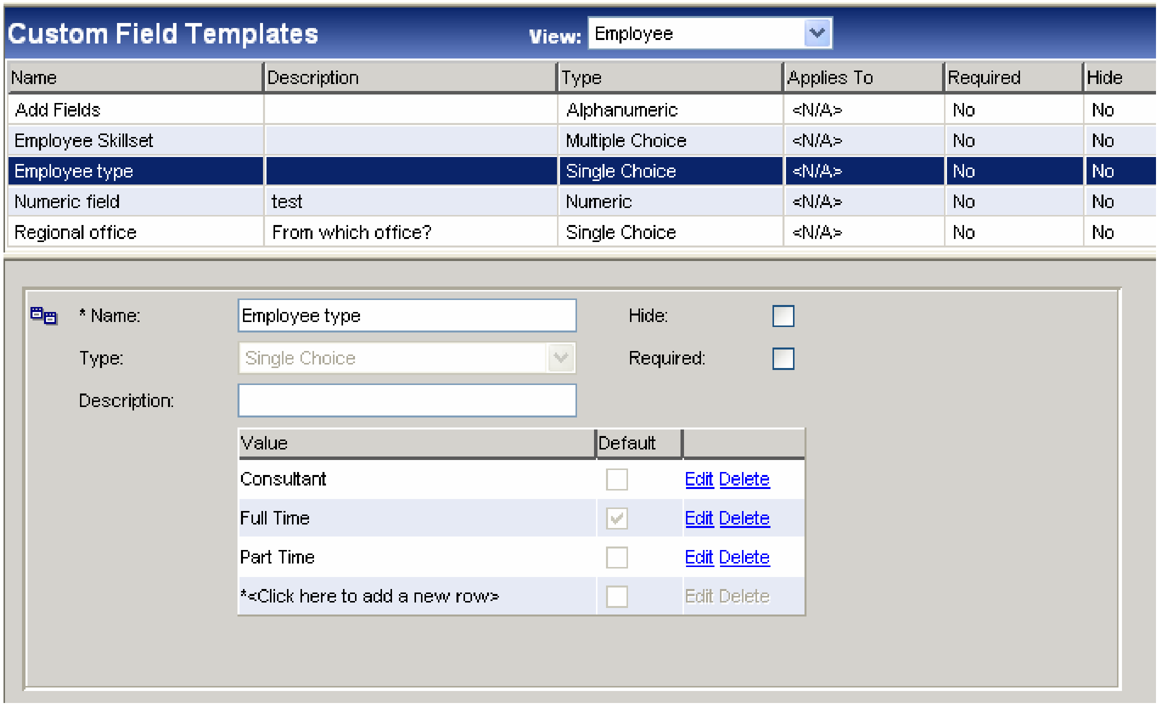
One or more **custom fields** can be created for any of the following items; regions, clients, project groups, projects, task groups, tasks, teams, employees, rates, overtime rates, invoices (billable), expenses, budgeted expenses, expense categories and time entries.

The following describes how to (1) create a custom field, (2) how to limit the availability of some custom fields, and (3) how to enter basic information after the custom field has been created.

To create a custom field:

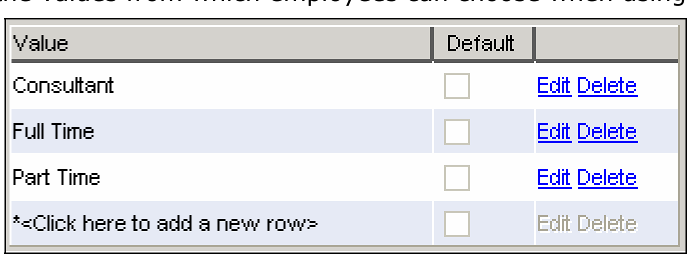
1. Click the **Custom Field Templates** button located in the Advanced section of the side navigation bar.
2. Using the **View drop-down** list near the top of the screen, select the view where the custom field will be added.

   Notes:
   - To add a custom field for time entries, select Time Entry.
   - To add a custom field for expense entries, select Actual Expenses.
   - To add a custom field for project groups, task groups or teams, select Group in the View drop-down list.
3. Click the **New** button on the toolbar.
4. Enter a unique custom field **name** (up to 50 characters). This is the name which identifies the custom field in the targeted view.
5. Select the type of data displayed in the custom field using the **Type** drop-down list. Available data types are Alphanumeric, Date, Multiple Choice, Numeric or Single Choice.



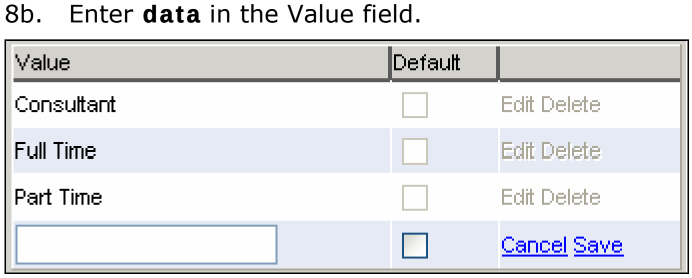
Note: Once a custom field has been added, the custom field Type (Date, Numeric, etc) can no longer be edited.

6. Enter a **description** for the custom field (up to 250 characters).
7. When specifying **Alphanumeric**, **Date** or **Numeric** in the Type drop-down list, you have the option to enter a **Default value** which appears in the new field.
8. When specifying **Single Choice** or **Multiple Choice** in the Type drop-down list, you must enter the values from which employees can choose when using this custom field.



8a. Click on the "**Click here to add a new row**" text.

8b. Enter **data** in the Value field.



8c. (**Optional**) Check the **Default** box to make this data the default selection.

8d. Click on the text marked **Save** to the right of the default checkbox.

8e. Create as many additional values as required.

9. To make this custom field a required field, check the **Required** box.

10. (**Optional**) Check the **Hide** box to hide this custom field from data entry. This is useful when the Custom field is no longer required but the data must be kept.

    Note: If both Required and Hide are selected, the Hide will overrule Required.

11. Click **Save** .
12. Repeat steps 3 to 11 as required.

Note: Reporting on Custom fields is accomplished through the Report Explorer. When you select a report, a report wizard is displayed. Check the Filter by Custom Field box to report on custom fields.

Tip: From most views, you can click the custom field icon located in the toolbar to directly access the Custom Field Templates view.

Using the Additional function

When Actual Expenses or Time Entry are selected from the View drop-down list, the **Additional** tab allows you to create custom fields which only appear when specific tasks or expense categories are selected by the user.

For the **Time Entry** custom fields, use the Additional tab to have a custom field appear only when a specific task is selected by a user.

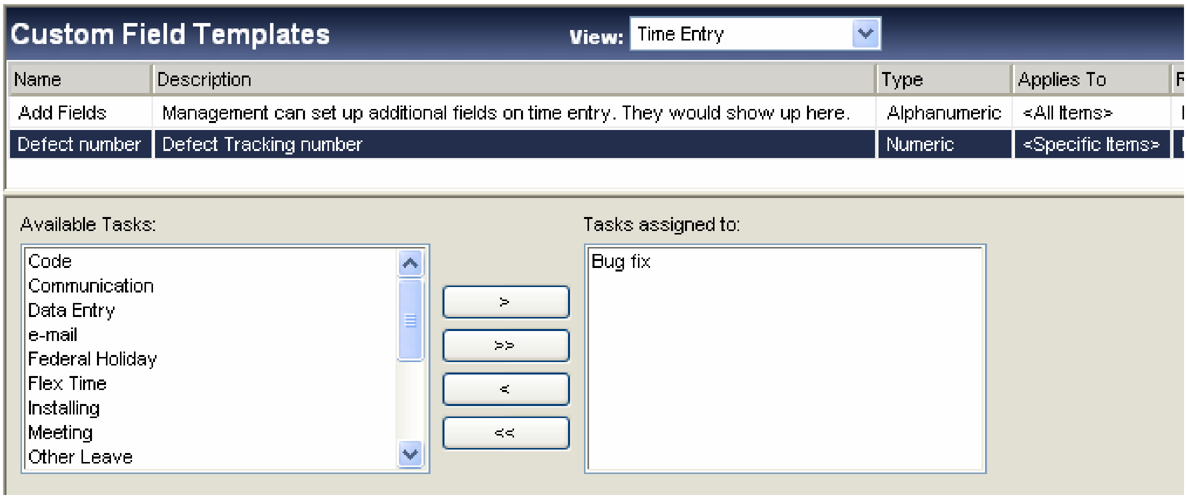
For **Expense Entry** custom fields, use the Additional tab to have a custom field appear only when one or more specific expense categories are selected by a user.

To limit when certain custom fields are available:

1. Select either Time Entry (or Actual Expenses) from the **View** drop-down list.
2. Select an existing custom field template from the list.
3. Click the **Additional tab** near the bottom of the screen.
4. From the list of available Tasks (or Expense Categories), select which items apply only to this custom field and click the arrow button **>** to move them to the assigned list on the right. By default, when a new custom field is created, all Tasks (or Expense Categories) are moved to the Assigned list box.
5. Click **Save** .

The image on the following page shows a custom field called "Defect number" created for time entry. Using the Additional tab, this custom field is setup to only appear when the Bug fix task is selected by the user.

For the end user adding an expense, the Defect number field is only available when Bug fix is selected as the task.



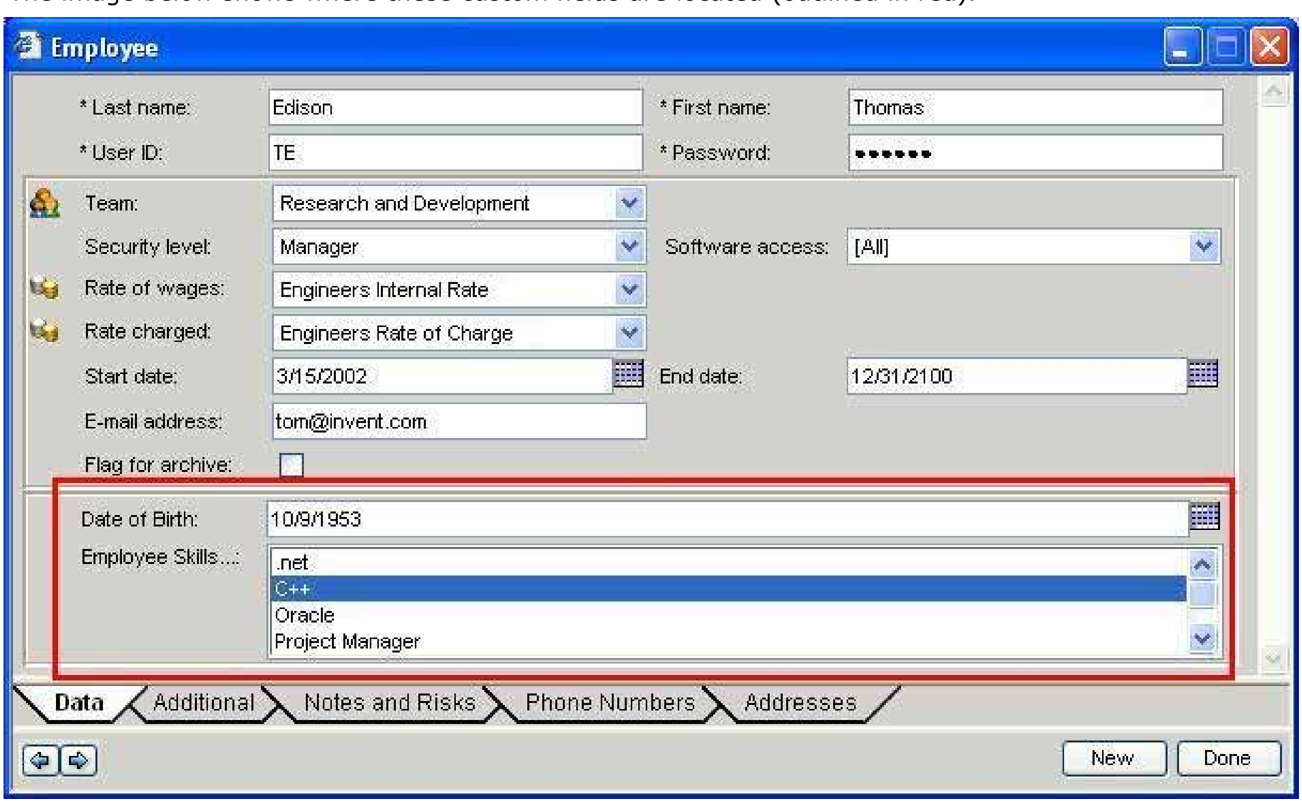
To enter custom field information:

All Custom Fields follow the same basic steps for entering field information. Only the view and type of item selected will change.

For this example, we will be entering data in a custom field created for Employee properties.

1. Custom fields (sorted alphabetically) are located at the bottom of the employee properties window. Required custom fields are displayed with an asterisk "*" next to the name. Enter your custom field information in these fields.
2. Click **Done**.

The image below shows where these custom fields are located (outlined in red).



Show/Hide Columns

The Show/Hide Columns function permits users to personalize certain views by showing, hiding or re-ordering specific columns.

To hide a column:

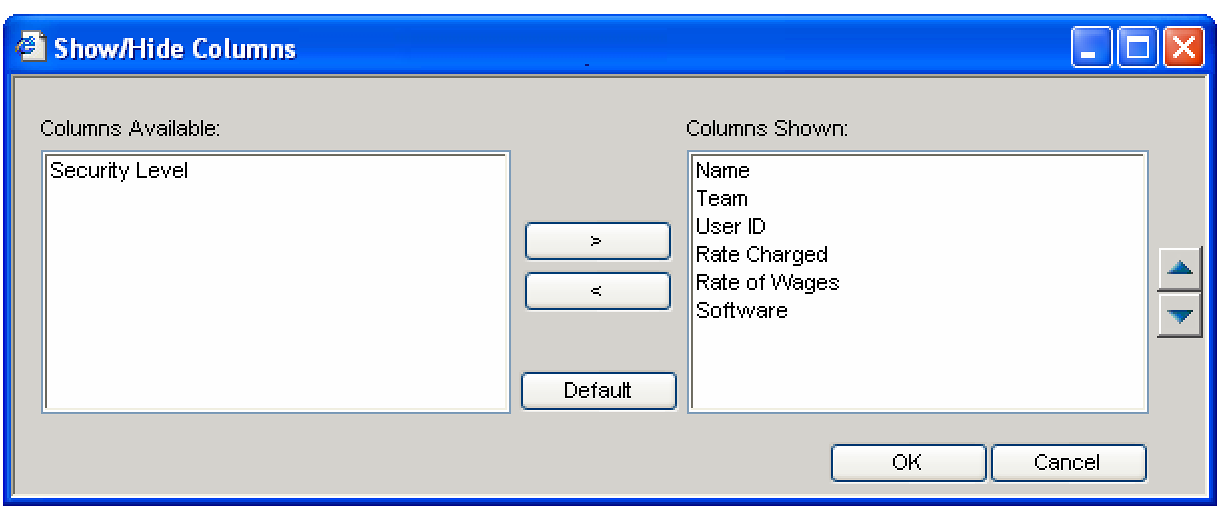
1. Click the **Show / Hide Column** button located in the view's toolbar.
2. From the **Columns Shown** list, select the column to hide and click the Remove button < located between the lists.
3. Click **OK**.

To show a column:

1. Click the **Show / Hide Column** button.
2. From the **Columns Available** list, select the column to show and click the Add button > located between the lists.
3. Click **OK**.

To re-order columns:

1. Click the **Show / Hide Column** button.
2. In the **Columns Shown** list, select the column to move.
3. Use the **Up** or **Down** buttons to move the selected column to its new position (top = left most column).
4. Click **OK**.



Notes:

- Modifications made to views using this function are only applied for the specific user.
- Pressing the **Default** button restores the columns to their original configuration.

Options

Use the **Options** view to configure other preferences.

The following describes (1) how to modify the option to Assign Tasks when assigning Task groups and (2) how to change settings for Paging. Modifications to these options does not alter the settings for other users.

Assign tasks when assigning task groups:

Easily and quickly assign tasks to employees or teams by using **task groups**. When this option is checked, a task belonging to a task group is automatically assigned when the task group is assigned. For further control over projects, you can manually remove or add individual tasks to projects at any time from the **Project Assignments** view.

Use this option as follows:

Box checked (default): To automatically assign associated tasks when assigning task groups to projects.

Box un-checked: If you do not want to assign associated tasks when assigning task groups to projects.

1. Click the **Options** button located in the Tools section of the side navigation bar.
2. **Check** (or **un-check**) the "Assign Tasks when assigning Task groups" box.
3. Click **Apply** when done.

Note: When a task is added to an existing task group, the option to update assignments will be made available to the user.

Paging:

By default, DOVICO Timesheet displays 100 records (items) per page in most views. The previous  or next  buttons are used to view additional pages.

Use the Paging setting to modify how many records are displayed on each page.

Use this option as follows:

1. Click the **Options** button located in the Tools section of the side navigation bar.
2. Enter the **number of items** per page (minimum of 1).
3. Click **Apply** when done.

Note: Paging is not used on all views.

Timesheet Options

The **Timesheet Options** view permits some modifications to the time and expense entry screens for each employee. Modifications are limited to showing or hiding certain data entry or information fields, and setting the default day which starts each week.

The following describes how to (1) configure some of the **time entry** data and information fields and how to (2) configure which data entry fields are displayed in the **expense entry** screen.

For most options in this view, you can configure an item to always be shown to the user, never be shown to the user or to allow the individual user to determine if the item is shown or not.

To modify time entry options:

1. Click the **Timesheet Options** button  located in the Tools section of the side navigation bar.
2. Click the **Timesheet** tab at the top of the screen.
3. Select one or more **employees** for which time entry options will be modified. To select more than one employee, hold the Ctrl key while making your selections.
4. For each time entry option, select either:

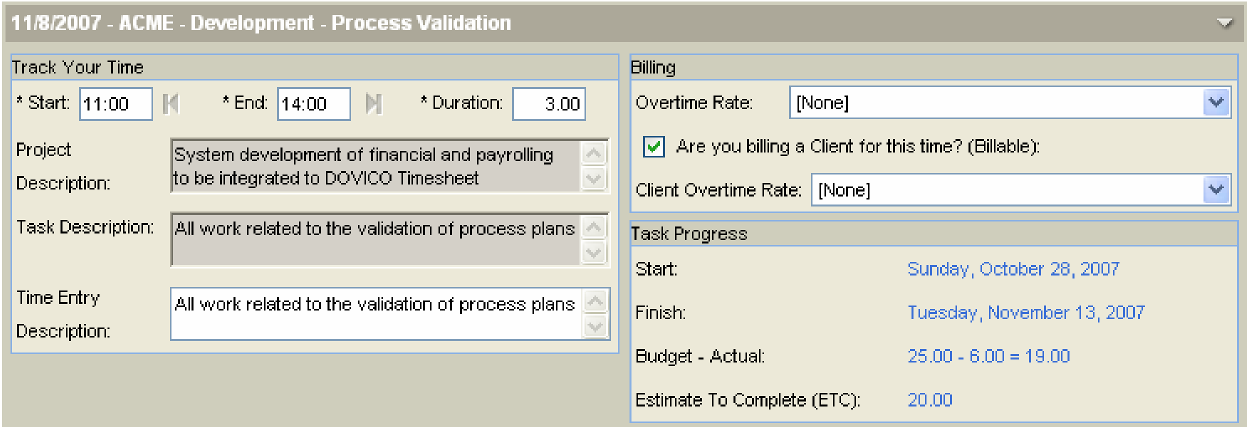
   Always shown to always display the item in the time entry screen.
   Always hidden to never display the item in the time entry screen.
   User configurable to permit the employees selected to determine whether or not to show the item in the time entry screen.

   Mixed is displayed as the status when employees do not have identical settings. While modifying options, Mixed can be selected to return a selection to its previous status (unless Apply was pressed).

   Time entry options:

   > **Note:** Most data entry and information fields described below are displayed in the details area of the time entry screen. The details area is only displayed, at the bottom of the time entry view, when you click on any cell within the time entry grid.

- **Start/End** times: Show/hide the Start and End times in the details area. Note that the Duration field cannot be hidden.
- **Project description**: Show/hide the project description in the details area. When hidden, the project description can still be viewed by mousing over the project name in the assignment tree or in the time entry grid.
- **Task description**: Show/hide the task description in the details area. When hidden, the task description can still be viewed by mousing over the task name in the assignment tree or in the time entry grid.
- **Time description**: Show/hide the time entry description field in the details area.
- **Billable**: Show/hide the billable checkbox in the details area.
- **Client Overtime**: Show/hide the Client Overtime Rate drop-down list in the details area.
- **Company Overtime**: Show/hide the Company Overtime Rate (Overtime Rate) drop-down list in the details area.
- **Task Progress information**: Show/hide the **Task Progress information** in the details area.
- **ETC column**: Show/hide the **ETC** column in the time entry grid.
- **Start of week**: Select the default day of the week which starts each week. Employees are able to modify their Start of the week option regardless of the selection made in this view.



5. Click **Apply**.

> **Note:** The time entry screen has a similar view (**Options**) permitting these and other personal options to be modified. However, when an item is selected as "Always shown" or "Always hidden" using this view (Timesheet Options), these items are not available for modification by the employee using the Options view.

To modify expense entry fields (columns):

1. Click the **Timesheet Options** button located in the Tools section of the side navigation bar.
2. Click the **Expense tab** at the top of the screen.
3. Select one or more **employees** for which expense data fields (columns) will be modified. To select more than one employee, hold the Ctrl key while making your selections.
4. Select one or more **expense data fields**:
   - **Expense Category**: Used to select a group for similar type expenses.
   - **Reference Number**: Used to enter a reference number or other tracking number.
   - **Purchase Order**: Used to enter a purchase order number or other tracking number.
   - **Reimburse**: Used to select whether the expense is to be reimbursed to the employee.
   - **Billable**: Used to indicate if the expense is billable or not.
   - **Markup %:** A markup percentage added to the expense amount.
   - **Fixed Amount**: Used to enter a fixed amount which is added to the expense amount.
   - **Value Added Tax 1**: Used to enter a tax rate used in expense reporting.
   - **Value Added Tax 2**: Used to enter a tax rate used in expense reporting.
   - **Client Cost**: Used to show the calculated client cost for the expense entry.
   - **Description**: Used to enter a description for the expense entry.
   - Non-required expense entry **custom fields** (if any).

5. For the selected fields, select either:

   Always shown to always display the data entry field in the expense entry screen.
   Always hidden to never display the data entry field in the expense entry screen.
   User configurable to permit the employee(s) selected to determine whether or not to show the data entry field in the expense entry screen.

   Mixed is displayed as the status when employees do not have identical settings. While modifying options, Mixed can be selected to return a selection to its previous status (unless Apply was pressed).

6. Click **Apply**.

Notes:

- The expense entry view's Sheet Name, Project and Date fields are required fields and therefore are not available to be hidden from a user.
- The expense entry screen has a **show/hide columns** option permitting individual users to show or hide expense entry fields. However, when an item is selected as "Always shown" or "Always hidden" using this view (Timesheet Options), these items are not available for modification by the employee using the show/hide columns function.

Databases Options

Select the **Database Options** view to configure database preferences. Changes made using the Database Options are only applied to the open database. Companies using multiple databases will need to open and configure each database according to their requirements.

To set or edit database options:

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Set or edit any of the following options:

   From the **General Tab**
   - Automatically create projects for each new client (page 155)
   - Include client short name in project name (page 155)
   - New tasks default to global (page 156)
   - Time & Expense Approval view preference (page 156)
   - Audit trail settings (page 156)
   - New project defaults (page 157)

   From the **Notifications Tabs**
   - Default SMTP settings (page 158)
   - Instant E-mail Notification defaults (page 158)

   From the **Database Terminology** and **Other Terms Tabs**
   - Set or edit terminology used throughout the application (page 159)

   From the **Company Profile Tab**
   - Enter or edit company information used in reports (page 159)

3. Click **Apply**.

Note: You can also set personal preferences using **Options** (page 150).

Automatically create Projects for each new Client

The "Automatically create Projects for each new Client" option generates a new project when a new client is created.

Box checked: DOVICO Timesheet will automatically create a new project for each new client added to the database. The project created uses the client name as the project name. Example; if a new client called Garland is created, then a project named Garland will appear under the client (Garland) in the Project Assignments view.

Box un-checked: (Default setting) With this option un-checked, projects must be created manually and assigned to a client.

To set your preference:

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Select the **General** tab.
3. In the Assignment Options area, check (or un-check) the box labeled "**Automatically create Projects for each new Client**".
4. Click **Apply**.

Include Client short name in Project name

Use this option as follows:

Box checked: DOVICO Timesheet includes the client abbreviation (short name) with the project name in various views, reports and drop-down lists within the administrative functions (client abbreviation - project name). The project name is appended to the full client name for time entry and in the Project Assignments view.

Box un-checked: To exclude the client abbreviation from the project name in views and drop-down lists (Project Assignments view excluded).

To set your preference:

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Select the **General** tab.
3. In the Assignment Options area, check (or un-check) the box labeled "**Include Client short name in Project name**".
4. Click **Apply**.

New tasks default to Global

Use this option as follows:

Box checked: To set tasks as Global whenever a new task is created. This option is useful for companies who usually don't make specific assignments of projects and tasks to employees (i.e. mostly assign all tasks to all employees). When a project has no assignments, global tasks are assigned to the project and all employees are assigned to the global tasks.

Box un-checked: To set tasks as Non Global whenever a new task is created.

To set your preference:

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Select the **General** tab.
3. In the Assignment Options area, check (or un-check) the box labeled "**New Task default to Global**".
4. Click **Apply**.

Time & Expense Approval view preference

This option enables an additional pane in the **Time & Expense Approval** view. This additional pane is similar to the top pane, and displays all other entries which have already been approved or are under review.

To set your preference:

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Select the **General** tab.
3. In the Time & Expense Approval view area, check or un-check the "**Show all entries within selected sheet's date range**" box.
4. Click **Apply**.

Audit Trail settings

DOVICO Timesheet's powerful **Audit Trail** logs additions, changes or deletions in numerous types of records in the database. Furthermore, the Audit Trail provides a means to log when a timesheet is saved, who saved it, who approved/rejected it, etc.

Audit trails are not only useful in recording what changes have been made, who made them and when they were made, but can be beneficial in recovering lost transactions or even to troubleshoot problems.

The audit trail information is saved in the DOVICO Timesheet database and can be extracted or backed up using **Backup Audit Trail** (page 172).

To use the Audit Trail function:

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Select the **General** tab.
3. In the Audit Trail area, select an Audit Trail **logging level** from the drop-down list.
   - **None** - No logging.
   - **Minimum** - Records the deletion of a project, employee, task, client, region, billing (invoices), overtime rate, rate, team, task group, project group, expense category, currency, workflow rule, leave/absences rule, security group, project approval workflow, automated job, custom field template as well as rate changes in the Employees view, rate changes in the Rates view, overtime rate changes in the Overtime Rates view, prorating changes in the Tasks view and the use of the Bulk Time Move utility.
   - **Medium** – Records all the logging capabilities of the Minimum level, plus additions and changes to those records.
   - **Detailed** – Records all Medium level capabilities plus any additions, changes or deletions of time entries and expenses, as well as approval/rejection of time/expense submissions. Also logs modifications of assignments, estimates information (excluding ETC). Also included in the Detailed logging level are logon and logout events.
4. Click **Apply**.

New Project Defaults

Use this option to set the default value for the Billable checkbox when a **new project is created**. The Billable checkbox for projects already existing in the database are not changed using this option.

Box checked: For all new projects created, this option will set all new time entries (and/or expenses) associated with this project as **billable** by default. That is, for employees entering time or expenses, the Billable checkbox will be set as checked.

Box un-checked: For all new projects created, this option will set all new time entries (and/or expenses) associated with this project as **non billable** by default. That is, for employees entering time or expenses, the Billable checkbox will be set as un-checked.

To set your preference:

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Select the **General** tab.
3. In the New Project Defaults area, select the default **billable option** for time and expenses when new projects are created.
4. Click **Apply**.

> **Note:** The setting for an individual project can be changed by modifying a **project's properties**. The default billable setting for individual task assignments can be modified using the **Budgeted Time & Costs** view.

E-mail Notification Defaults

Use this section to enter the default settings used for sending e-mails to employees through the **Job Scheduler** and to set the default **Instant Email Notification** options for new employees.

To setup the e-mail notification information:

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Select the **Notifications** tab.
3. In the Email Notifications area, enter the **SMTP Server Name** or IP Address to be used to send e-mails.
4. Enter the **Port number** that the SMTP Server uses. Generally an SMTP Server uses Port 25, however this may change depending upon your SMTP Server's configuration. See your system administrator for details.
5. In the **Reply Address**, enter the e-mail address to which the recipients can reply.
6. (**Optional**) Where secure SMTP communication is required, check the **Use SMTP Authentication** box and enter the User ID and Password.
7. Click **Apply**.

Instant Email Notification defaults for new employees:

Use this option to set the default value for the Instant Email Notification checkboxes (shown in the Employee properties Additional tab, page 44) when a **new employee is created**. This will also set the default values for the affiliated checkboxes in the Update Employee Properties view. The checkboxes for employees already existing in the database are not changed using this option.

Box checked: For all new employees created, the checkbox will be set as checked.

Box un-checked: For all new employees created, the checkbox will be set as un-checked.

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Select the **Notifications** tab.
3. In the **New Employee Instant Notification Defaults** area, select the default value for each option.
   - **Notify when there is time to approve**: This option sends an e-mail to the employee whenever a timesheet is awaiting his/her approval.
   - **Notify when there are Expenses to approve**: This option sends an e-mail to the employee whenever an expense sheet is awaiting his/her approval.
   - **Notify when time/Expenses have been rejected**: This option sends the employee an e-mail whenever one of his/her time or expense sheets has been rejected.
4. Click **Apply**.

Database Terminology and Other Terms Tabs

The terminology used throughout DOVICO Timesheet may not exactly match the terms used within your company, department or profession. The **Custom Terminology** feature permits changes to terminology used in more than 20 fields.

Examples:
DOVICO Timesheet uses "Team" but you could change it to "Department"
"Client" could be changed to "Business Unit", "Division", "Customer", "Buyer"
"Employee" could be changed to "Worker", "Resource"
"Project" could be "Job", "Purchase Order", "Contract"
"Task" could be "Work Order", "Activity", "Phase"

Customize terminology according to your business needs.

Changes will appear in menu items, column headings and reports.

To customize terminology:

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Select the **Database Terminology** tab to change wording for Employee, Team, Task, Project, Client, Billing, Expense, Region, Rate, Quantity or Value Added Tax references.
3. Select the **Other Terms** tab to change wording for project status (Estimate, Quotation, Active, Rejected, Terminated, Finished) and billing by (Fixed Cost, Actual Hours and Estimated Hours).
4. Enter your preference for terms used. When changing terms for Database Terminology, make sure you also enter the plural equivalent in the adjacent box.
5. Click **Apply** and log out for the changes to take effect.

Please note that instructions provided in this document use DOVICO Timesheet's default terminology.

Company Profile

Enter information about your company (name, address, telephone, etc.). Some of the information entered is used in various reports.

To enter company information:

1. Click the **Database Options** button located in the Tools section of the side navigation bar.
2. Click the **Company Profile** tab.
3. Enter your **Company Name**. The company name is shown in the footer for all reports.
4. Enter your **Mailing Address**. The mailing address is used on invoice reports.
5. Enter your **Street Address**. For information purposes only.
6. Enter your **Telephone** and **Fax Numbers**. For information purposes only.
7. Enter your general **E-mail address**. For information purposes only.
8. Enter your **Web Site address** (URL). For information purposes only.
9. Click **Apply**.

Bulk Workload tools

Bulk workload tools are included for those occasions when changes, or additions are more effectively done as a group than in individual operations for each project, employee, etc.

To apply widespread changes to project budgets, see Budget Wizard on page 86.

To apply widespread changes to project actuals, see Actual Wizard on page 92.

See page 60 to learn how to create a large number of assignments more efficiently (Quick Assign).

In Bulk Tools ...

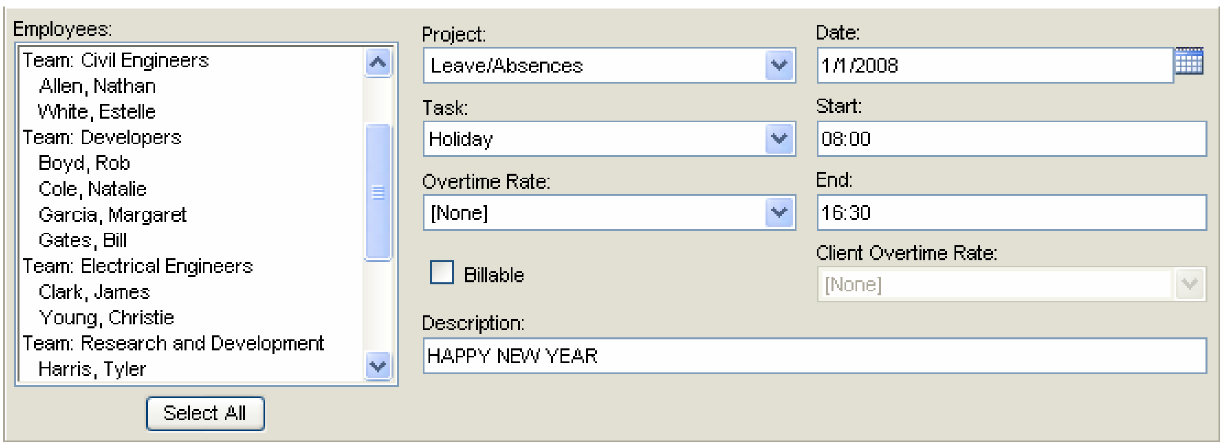
Holiday Time Entry

Use the **Holiday Time Entry** function to quickly add a time entry for multiple employees. This function is beneficial when multiple employees have a common time entry such as a federal holiday or can be used to enter any common time entry for multiple employees.

Note: Time entries added using Holiday Time Entry bypass all approval processes.

To add a time entry for multiple employees:

1. Click the **Holiday Time Entry** button  located in the Tools section of the side navigation bar.



2. Select one or more **employees** from the Employees list.

   Tip: To select non-adjacent employees, hold the **Ctrl** key while making your selections.

3. Select a **project**.
4. Select a **date**.
5. Select a **task**.
6. Enter the **start** and **end** times.
7. Optionally select an **overtime rate**.
8. Check the **billable** box if this time entry is billable.
9. Optionally select a **client overtime rate**.
10. Enter a **description** (up to 250 characters).
11. Click **Apply**.

Notes:

- If the project and task selected are not currently assigned to the selected employees, the time entry added will not appear in any reports showing both actual and estimate information.
- The new time entry will not be added to specific employees if there are overlapping start and end times with existing time entries.

Bulk Time Move

The **Bulk Time Move** utility gives an administrator the ability to move time entries from one project to another, from one task to another or from project/task to project/task. The design flexibility allows a user to select all time entries for a given project or task, or to filter the selected time entries by project, task, employee and date.

There are 3 scenarios in which time entries can be moved. For each scenario there is also the ability to filter by employee and by date.

- Move time from one project and task to another project and task
- Move time from one project to another project (for all tasks)
- Move time from one task to another task (for all projects)

Notes:

- Time cannot be moved from one employee to another, nor can time be moved to a different day. That is, the Bulk Time Move utility permits an employee's time entries, for a given day, to be moved to different projects or tasks, on the same day.
- Time is moved regardless of its submitted and approved status. That is, Approved, Rejected, Un-submitted and time Awaiting Approval is moved.
- Projects and tasks associated to Microsoft Project are not available as source or destination targets.

Warnings:

- The Bulk Time Move feature is a very powerful utility and should be used **cautiously** as a considerable amount of data can be manipulated and there is no Undo function.
- Time entries moved bypass all approval processes.
- When a time entry is moved to a project or task not assigned to the employee, the entry will not be displayed in any report showing budget information and will not be displayed in the Budgeted Time & Costs view.

The **Bulk Time Move** view is located in the Tools section of the side navigation bar.

Selection parameters:

Source Projects: Lists all projects which have time entries.

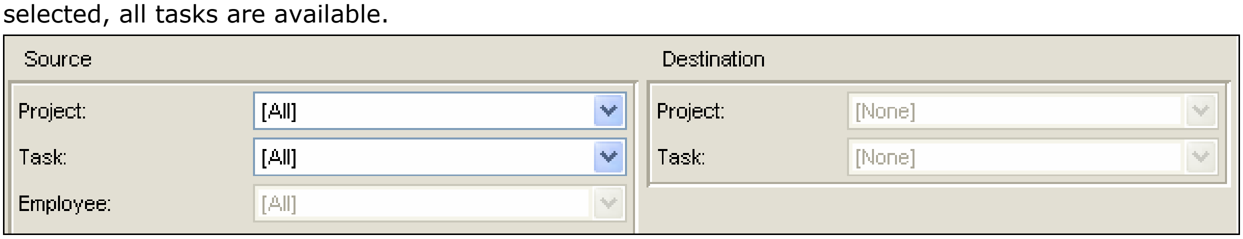
Source Tasks: Lists all tasks associated with the source project. If no source project is selected, all tasks are available.

Employees: Lists the employees corresponding to the source project and task selected.

Date Range: Used to further narrow the data to be moved.

Destination Projects: Lists all projects which have task/employee assignments. If one or more global tasks exist, then all projects are listed.

Destination Tasks: Lists all tasks associated with the destination project. If no destination project is selected, all tasks are available.



To move time from one project and task to another project and task:

1. Select the **Source project** from the drop-down list.
2. Select the **Source task** from the drop-down list.
3. Select a **Destination project**.
4. Select a **Destination task**.
5. (**Optional**) Select a **Source employee**.
6. (**Optional**) Specify a **date range** by checking the Filter by Date Range checkbox and modifying the **From** and **To** dates using the calendar controls.

The **Affected Records** displayed below the From calendar indicate the total number of time entries to be moved.

7. Click the **View Details** button to see a report detailing all the time entries selected. Save or Print the report as required.
8. Click **Apply** to move the time entries.

To move time from one project to another project (for all tasks):

1. Select the **Source project** from the drop-down list.
2. Leave the **Source task** at **[All]**.
3. Select a **Destination project**.
4. (**Optional**) Select a **Source employee**.
5. (**Optional**) Specify a **date range** by checking the Filter by Date Range checkbox and modifying the **From** and **To** dates using the calendar controls.

The **Affected Records** displayed below the From calendar indicate the total number of time entries to be moved.

6. Click the **View Details** button to see a report detailing all the time entries selected. Save or Print the report as required.
7. Click **Apply** to move the time entries.

To move time from one task to another task (for all projects):

1. Leave the **Source project** at **[All]**.
2. Select the **Source task** from the drop-down list.
3. Select a **Destination task**.
4. (**Optional**) Select a **Source employee**.
5. (**Optional**) Specify a **date range** by checking the Filter by Date Range checkbox and modifying the **From** and **To** dates using the calendar controls.

The **Affected Records** displayed below the From calendar indicate the total number of time entries to be moved.

6. Click the **View Details** button to see a report detailing all the time entries selected. Save or Print the report as required.
7. Click **Apply** to move the time entries.

Update Employee Properties

Use the **Update Employee Properties** view to quickly and easily adjust employee properties for all or multiple employees. Use it to save time when you need to make a change for a large number of employees.

To update employee properties:

1. Click the **Update Employee Properties** button  located in the Tools section of the side navigation bar.
2. Select one or more **employees** from the list.
3. Perform any or all of the updates described below for the employees selected:
   - Check the **Timesheet Approval** box and select the **Workflow** process from the drop-down list.
   - Check the **Expense Approval** box and select the **Workflow** process from the drop-down list.
   - To change the **Leave/Absences** Accrual start date, check the Accrue Start box, and select a date.
   - To add an Adjustment to the Leave/Absences Accrual, check the Adjustment box and enter the Adjustment Amount.
   - Check the **Security Group** box and select the Security Level from the drop-down list.
   - Check the **Email Notifications** box and set the default value for the Instant Email Notification checkboxes (shown in the Employee properties Additional tab, page 44).
     - **Notify when there is time to approve**: This option sends an e-mail to the employee whenever a timesheet is awaiting his/her approval.
     - **Notify when there are Expenses to approve**: This option sends an e-mail to the employee whenever an expense sheet is awaiting his/her approval.
     - **Notify when time/Expenses have been rejected**: This option sends the employee an e-mail whenever one of his/her time or expense sheets has been rejected.

     Note: To receive Email Notifications, employees must have valid e-mail addresses entered in their employee profile.
4. Click **Apply** when done.

Tip: To select more than one employee, hold the **Ctrl** key while making your selection.

Job Scheduler

Job Scheduler is a job automation tool. It gives the user the ability to automate functions such as sending reports and notices, or maintaining the database.

Job Scheduler performs the following routine operations automatically for any DOVICO Timesheet database:

Automatic Notifications provides the ability to send out e-mail notices to employees and managers regarding time waiting approval, project alerts, incomplete timesheets, etc..

Automatic Reporting provides the ability to have reports automatically created and e-mailed to employees and clients on a one time or recurring basis. Reports can be e-mailed in PDF, Word, Excel, RTF or CSV formats.

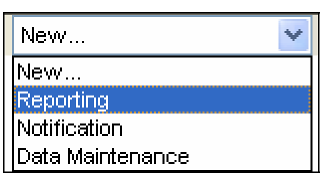
Data Maintenance provides the ability to create an automatic and scheduled Backup or Reindex of the database.

The Job Scheduler view displays all currently created jobs, their job type, their next run time and description.

Note: The Database Maintenance option is not available with DOVICO Timesheet's Hosted Online solution.

To create a scheduled job:

1. Click the **Job Scheduler** button located in the Tools section of the side navigation bar.
2. Select the **type** of job from the drop-down list. If the type of job is already selected, then click the **New** button on the toolbar.



A new window opens displaying the various criteria required to schedule the job. The details required vary depending on the type of job selected:

Notification jobs

Time/Expenses Awaiting Approval (page 102)

Project Alerts (page 109)

Project Assignments (page 103)

Employee Incomplete Timesheet (page 105)

Manager Incomplete Timesheet (page 107)

Custom E-mail (page 120)

Data Maintenance job (page 121)

Reporting job (page 122)

To edit a scheduled job:

1. Click the job **row** to edit from the list.
2. Click the **Edit** button on the toolbar.
3. Edit information in any of the available tabs.
4. Click **Done** when all edits have been completed.

Security

DOVICO Timesheet uses permission-based security allowing managers to specify each employee's access to functions and views. This flexible security system is capable of providing each employee with only the information and tools required to perform his/her role within the organization.

Built-in security levels (security groups) provide a good starting point when assigning security to each employee, but the ability to create custom security groups allows companies to fine-tune security for those employees with unique requirements.

In Security …

Security Groups

The **Security Groups** view is used to create custom levels of security which, when applied to employees, restricts access to views and tools. Custom security groups can also be set up to restrict access to the costing and rate information displayed throughout the application.

Notes:

- DOVICO Timesheet includes 5 internal security groups which cannot be deleted or modified. These security groups are Administrator, Manager, Group Leader, Auditor and Time & Expense Entry. See **Internal Security Groups** (page 169) for a detailed description of each internal security group.
- Security Group permission reports detailing access settings for all internal and custom security groups are available in the Reports Explorer's Administration \ System Administration folder.

To create a custom security group:

Tip: The fastest way to create a new security group is to identify which of the existing security groups best fits the new group's requirements; copy and paste this security group and then make the necessary changes to the name, permissions, etc. Note that security for reports and report folders are copied in this manner.

1. Click the **Security Groups** button located in the Advanced section of the side navigation bar.
2. Click the **New** button on the toolbar.
3. Enter a unique security group **name** (up to 100 characters).
4. (**Optional**) Enter a brief **description** of the security group (up to 250 characters).
5. The **Views** list box displays all available administrative views for which Read, Modify, Delete and Limited Access can be modified. Select each view and assign permissions by selecting Yes or No in each access type drop-down list. You can apply the same setting to multiple views by selecting more than one view from the list and then modifying the Access type.

   Mixed is displayed as the status when more than one view is selected from the list and these do not have identical settings. While modifying options, Mixed can be selected to return a selection to its previous status (until Save is used).

   Access types:

   - **Read**: To see the view but not add, edit or delete items.
   - **Modify**: To read, add, edit and save items. Cannot delete items.
   - **Delete**: To delete items.
   - **Limited Access**: For a manager to only view information for those items that he/she manages. Limited access can only be applied to certain views.
     Example: if Limited Access is applied for projects; the person using that security group will only see the projects for which he/she is assigned as the manager. Also any projects that have no assigned manager will be available to this person. A more comprehensive description of how limited access affects views can be found on page 170.

6. The **Tools/Features** list box displays the views which can only be enabled or disabled. Select each item and assign permissions by selecting Yes or No in the **Access** drop-down list.
7. (**Optional**) Show/hide company or client cost and rate information for this security group by selecting the appropriate checkboxes in the **Cost Security** area. These options apply to time related costs and rates only. Expense costs are not hidden.

- **Show Client cost information**: Un-check this box to hide client cost, rate charged and overtime rate information in applicable views and reports for all users assigned to this security group.
- **Show company cost information**: Un-check this box to hide company cost, rate of wages and overtime rate information in applicable views and reports for all users assigned to this security group.

> **Note:** The settings do not hide rates from those views which are specifically designed to create and review rates. Therefore as a precaution make sure that any security group with one or both of these boxes unchecked also has restricted access to the following areas: Rates view, Billing view, Update Employee Properties view, Security Group view and Import/Export tool.

8. (**Optional**) Check the **Flag for archive** box if you want to remove this security group from the database the next time the Archive Database function is run.
9. Click **Save** .
10. Go to the **Reports Explorer** view and assign security to each report and report folder as required.

Notes:

- When reports are generated, options to **show cost information** are available at the top of the PDF viewer. These are made available as the report may need to be distributed to other individuals or in the case where the report is scheduled to be automatically generated and e-mailed to other individuals (via the Job Scheduler).
- If an administrator changes a security group while an employee is using DOVICO Timesheet, then the new security changes will not take effect until the employee logs out of the application.
- The number of security groups displayed in the view is limited by the **Paging** setting (page 150). You may need to click the **paging** buttons or (at the top of the screen) to view additional record pages.

Tip: If you have assigned a manager Limited Access to the Employees view, the manager can gain access to all employees by assigning themselves as the manager of all teams in the Teams view. To prevent this, restrict access to the Teams view.

Internal Security Groups

Each employee entered into the database must be assigned a security level giving that employee access to all or selected parts of DOVICO Timesheet's software components.

DOVICO Timesheet has 5 built-in (internal) security groups which cannot be deleted or modified. Additional security groups can be created from the **Security Groups** view.

Note: Security Group permission reports detailing access settings for all internal and custom security groups are available in the Reports Explorer's Administration \ System Administration folder.

The 5 internal security groups are:

- **Administrator**: Employees assigned to this security level can edit, add, delete, view and print information in every part of the software.

- **Manager**: Employees assigned to this security level can edit, add, delete, view and print information from most views. Managers do not have access to the following views, tools and features:

  Views not accessible: Employees, Rates, Overtime Rates, Leave/Absences Rules, Workflow and Security Groups.

  Tools/Features not available: Import/Export, Import Recovery, Bulk Time Move, Database Options, Job Scheduler, Backup Audit Trail, Update Employee Properties, Report Security, Active Directory and Timesheet Options.

- **Group Leader**: Employees assigned to this security level can edit, add, delete, view and print information in only a limited number of views. Group leaders do not have access to the following views, tools and features:

  Views not accessible: Reports Explorer, Clients, Regions, Billing, Employees, Teams, Rates, Budgeted Time & Costs, Actual Time & Costs, Expense Categories, Currencies, Overtime Rates, Leave/Absences Rules, Workflow, Custom Field Templates and Security Groups.

  Tools/Features not available: Import/Export, Import Recovery, Bulk Time Move, Database Options, Job Scheduler, Approval Override, Microsoft Project, QuickBooks, Backup Audit Trail, Update Employee Properties, Report Security, Active Directory and Timesheet Options.

  Notes about Group Leader:
  In all situations described below, items (projects, task groups, teams, etc.) for which there is no designated manager will also be available to the user.
  - For projects, tasks and task groups, the group leader will only have access to the items for which he/she is the designated manager.
  - In the Project Assignment and Quick Assign views, the group leader will only have access to the projects, employees (teams), tasks and task groups for which he/she is the designated manager.
  - In the Budgeted Expenses and Project Approval views, the group leader will only have access to the projects for which he/she is the designated manager.
  - In the Time Calendar and Holiday Time Entry views, the group leader will only have access to the employees for which he/she is the designated manager.

- **Auditor**: Employees assigned to this security level can only view, print and export report information. All other DOVICO Timesheet options and views are inaccessible.

- **Time and Expense entry**: Employees assigned to this security level only have access to time & expense entry. Access is denied to administrative functions.

Limited Access

From the Security Groups view, limited access can be assigned to a limited number of views. As a general rule, setting limited access to a view means that the person assigned to that security group can only view or edit items (projects, tasks, task groups, teams, etc) for which they are the designated 'manager'.

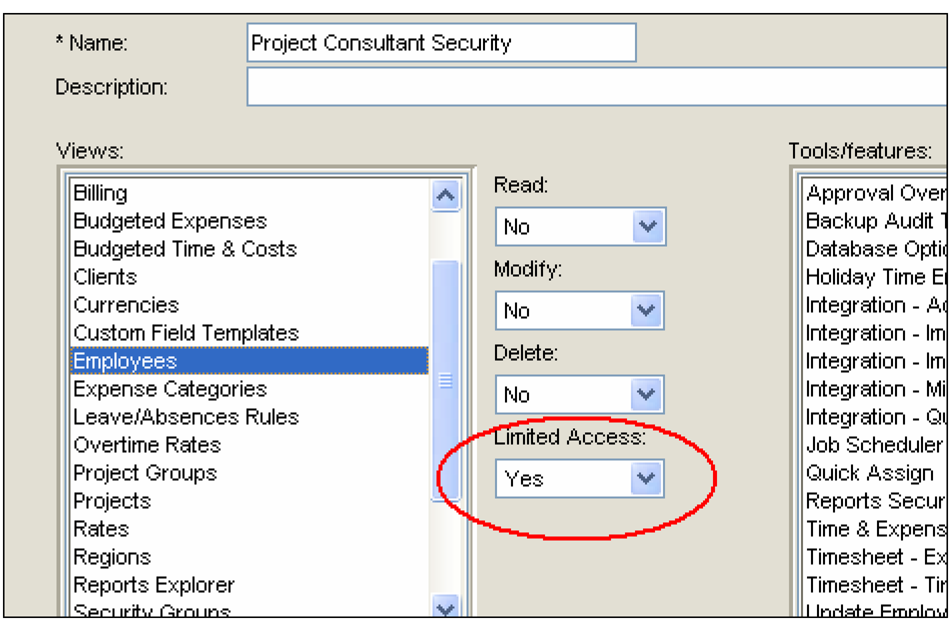
The following details what views are affected when limited access is applied.

Notes:

- In all situations described below, items (projects, task groups, teams, etc.) for which there is no designated manager will also be available to the user.
- Limited access cannot be modified for the 5 internal Security Groups built into DOVICO Timesheet.
- Although limited access can only be applied to a limited number of views, the effect is distributed across multiple views and tools. See the detailed list below.

When Limited Access is set for **Employees**:

- In Time Calendar, Items List - Employees, Reports Explorer, Timesheet Options, Update Employee Properties and Holiday Time Entry: The user will only have access to employees who belong to teams for which he/she is the designated manager, employees who belong to teams which don't have a manager and employees who don't belong to any team.
- In the Project Assignments view: The user will be able to view all assignments, assign any task or task group to any project, but will only be able to assign employees (or edit employee properties) who belong to teams for which he/she is the designated manager, employees who belong to teams which don't have a manager and employees who don't belong to any team. The user will be able to assign teams (or edit team properties) for which he/she is the designated manager and teams which have no designated manager.
- In the Quick Assign view: The user will be able to assign any task or task group to any project, but will only be able to assign employees who belong to teams for which he/she is the designated manager, employees who belong to teams which don't have a manager and employees who don't belong to any team. The user will only be able to assign teams for which he/she is the designated manager and teams which have no manager.



Example: For the security group called "Project Consultant Security", limited access has been set for Employees. As a result, all users assigned to the security level "Project Consultant Security" will have limited access to employees, as detailed in the text above.

When Limited Access is set for **Assignments**

- In the Project Assignments and Quick Assign views: The user will only be able to view, create or modify assignments for the projects for which he/she is the designated manager and for projects which have no designated manager.

When Limited Access is set for **Projects**

- In Budgeted Time & Costs, Actual Time & Costs, Budgeted Expenses, Project Approvals, Items List - Projects and Reports Explorer: The user will only have access to projects for which he/she is the designated manager and for projects which have no designated manager.
- In Project Assignments, the user will have full assignment access to all projects, but will only be able to edit project properties for those projects for which he/she is the designated manager and for projects which have no designated manager.

When Limited Access is set for **Task Groups**

- In Items List - Task Groups, Reports Explorer and Quick Assign: The user will only have access to task groups for which he/she is the designated manager and for task groups which have no designated manager.
- In the Project Assignments view: The user will be able to view all assignments, assign any employee, team or task to any project, but will only be able to assign task groups (or edit task group properties) for which he/she is the designated manager, and task groups which have no designated manager.

When Limited Access is set for **Tasks**

- In Items List - Tasks, Reports Explorer and Quick Assign: The user will only have access to tasks for which he/she is the designated manager and for tasks which have no designated manager.
- In the Project Assignments view: The user will be able to view all assignments, assign any employee, team or task group to any project, but will only be able to assign tasks (or edit task properties) for which he/she is the designated manager, and tasks which have no designated manager.

Backup Audit Trail

The **Backup Audit Trail** function permits an authorized user to backup or extract audit trail information from the DOVICO Timesheet database.

See **Audit Trail settings** (page 156) for information on enabling the audit trail and details on what changes to the database are logged.

To backup an audit trail:

1. From the Tools section of the side navigation bar, select **Backup Audit Trail** .
2. Specify a **date** from which all audit trail entries, before that date, will be backed up or extracted.
3. When checked, **Delete all Audit Trail entries exported** removes the selected audit trail entries from the database. To keep the original information within the database, un-check this box.
4. Click **Backup**.
5. **Open** or **Save** the backup file when prompted.

Notes:

- The Backup Audit Trail function converts/exports the data to a **comma separated (.csv)** file.
- The Backup Audit Trail is only available to users with an **Administrator security** level.
- The Backup Audit Trail file created in this process should be **stored in a secure location**.

General Hints, Tips and Notes

The following is a list of general hints, tips, notes and functions to help you use DOVICO Timesheet's administrative functions to their full potential.

Administrative functionality tips

- Use the **Show/hide columns** function to show or hide columns in certain views.
- Use the **Filter** button to add a filter to show only items matching the selected criteria. To remove the filter, click the button.
- To copy an item, select the item, click copy then paste. Edit the copied item as necessary.
- Create **project templates** (page 30) to quickly & easily copy one or more projects including assignments.
- Create a new security group based on an internal security group. From the Security Groups view, select the Internal Security Group that closely matches what is required for the new group. Copy and paste that security group and then modify the settings of the copied security group and assign it to employees.
- You can view the current number of employees registered to use DOVICO Timesheet, by clicking the About button on any toolbar.
- To prevent accidental deletion of projects, tasks, employees, etc, create new security groups, remove the Delete rights from each new group and then apply the new security groups to each employee having access to the Administrative functions.

Assigning Estimated hours at the Task level

A work-around for assigning estimated hours to a task, rather than to each task/employee assignment is to create a fake or dummy employee, and assign all estimated hours for a given task to this one employee. The dummy employee will never enter time and does not require a license. The actual employees assigned to the task will not have any estimated time entered for them, but they will enter their actual time. This work-around should not be used if you need to create detailed budgeted hours and costs at the employee level. Since the estimated costs for the task will be calculated using the rate assigned to the dummy employee, an "average" rate should be assigned to this dummy employee.

Reports displaying estimates and actuals, for projects and tasks, will be accurate at the task level, but all estimates will show under one dummy employee, and all actuals will show under the correct employees. This work-around eliminates the need to split estimates by task and employee, if such detailed estimates are not required or if employees are continually being re-assigned to a task.

Unassign a user from a project without losing reporting and estimate information

- You can hide a project from time and expense entry and keep information for reporting, etc. by either **hiding the specific employee assignments** (page 53) or changing the **project status** (page 29) to anything other than 'active' or 'estimate'.

Project Conclusion

When a project is finished, rejected or cancelled, you can:

- **Inactivate** the project. From the projects view, enter the End date for the project and select a new Project Status (other than Estimate or Active). The project will still be available for reporting but it will no longer be available to employees for time and expense entry. If you check the Hide box, the project will not be displayed in pick lists for reporting.

- **Archive the project**. When you check the Flag for Archive box for a project, the next time you archive information, it will remove the project name and related information from the active database and place them in the archive database. You can report on the information as needed when you open the archive database, however the information will no longer be available for reporting in the active database.
- Deleting the project is not recommended because all related information will also be deleted and cannot be recovered.

New employee

When new employees are hired, here are the steps to follow for setting up these employees for time and expense entry:

- Check for available licenses to make sure you have enough licenses to use for the new employee(s). Click the About button on any toolbar to find out how many licenses have been purchased and how many are used.
- From the Project Assignments view, add the new employee. Take note of the employee's User ID and Password. Make certain you select at least 'Time and Expense Entry only' in the Software Access field and that the Security level is at least set to 'Time and Expense Entry'. This will ensure that the employee can enter time and expenses.
- If cost reporting is used, apply the proper Rate of Wages (Pay Rate) and Rate Charged (Billing Rate) to the employee.
- From the employee's properties window, click the Additional tab and set applicable Approval Workflows, Leave/Absences Rules and Instant Email Notification settings.
- Add the new employee to any applicable Project Approval workflows or scheduled reporting or notification jobs.
- Use Quick Assign to assign projects and tasks for the new employee. If the new employee will have similar assignments as an existing employee, you can use the Copy Employee Assignments function and then edit individual assignments as necessary.
- Add the new employee to any applicable scheduled reporting or notification jobs (Job Scheduler).
- Use the Timesheet Options view to customize the employee’s time and expense entry screens.
- Send the new employee, his/her User ID, Password and the URL or path to login to DOVICO Timesheet.
- Inform the employee how to use DOVICO Timesheet to enter time and expenses (or use our On Demand Training). www.dovico.com/client.html.

Data Mining

Let’s take a brief look at ways you can use DOVICO Timesheet to create custom reports and link with other software.

- Generate a report in DOVICO Timesheet then click the export button on the toolbar to export it to another application (Excel, Word, etc.) for customization.
- Easily import or export any information in DOVICO Timesheet using the **Import/Export Tool**.
- Use data mining or business intelligence tools to extract data from the DOVICO Timesheet database. For example, using Crystal Reports or Excel, you can easily select specific fields in DOVICO Timesheet tables and create custom reports using your own business rules.
- An active link with Microsoft Excel can be established. Search for "DV1045" on DOVICO's Knowledge Base at http://www.dovico.com/techtips.html.
- A link to Microsoft Access can be established as either a two-way live link, using a **Microsoft Access Project** or a one-way active link with a **Microsoft Access Database**. Search for "DV1103" on DOVICO's Knowledge Base at http://www.dovico.com/techtips.html.

Copy / Paste

Use this option to create one or more copies of an item in the current view (only applicable in certain views).

This function is particularly useful to create a "**template**" when building new projects. It is also useful in the Security Groups view when creating a **new security group**.

To copy an item:

1. From the list, **select the item** to be copied.
2. Click the **Copy** button.
3. Click the **Paste** button. The copied item will appear at the bottom of the list.
4. **Edit the information** for the new item as required.
5. Click **Save** where applicable.

Notes:

- For most views, the copy/paste function will copy all attributes including Custom fields, Notes and Risks, Phone Numbers, etc. View the information below for details on what does, or does not, get copied.
- The copy/paste function in the Project Assignments view works differently than described here. See **copy project and task assignments** for complete details on page 54.

Information duplicated when using the copy function:

Actual Expenses: All record details, Custom fields, Notes, Phone Numbers and Address information

Budgeted Expenses: All record details, Custom fields, Notes, Phone Numbers and Address information

Clients: All record details, Client Acronym, Custom fields, Notes, Phone Numbers and Address information

Currencies: All record details

Employees: All record details (except Tool usage), Leave/Absences Rules, Custom fields, Notes, Phone Numbers and Address information

Expense Categories: All record details and Custom fields

Leave/Absences rules: All record details and Accrual Rules

Overtime Rates: All record details, Custom fields, Notes, Phone Numbers and Address information

Project Groups: All record details, Custom fields, Notes, Phone Numbers and Address information

Projects: All record details, Assignments, Project Approvals, Custom fields, Notes, Phone Numbers and Address information

Rates: All record details, Applied Overtime Rates, Custom fields, Notes, Phone Numbers and Address information

Regions: All record details, Custom fields, Notes, Phone Numbers and Address information

Security Groups: All record details, Permissions, Notes, Phone Numbers and Address information

Tasks: All record details, Custom fields, Notes, Phone Numbers and Address information

Task Groups: All record details, Custom fields, Notes, Phone Numbers and Address information

Teams: All record details, Custom fields, Notes, Phone Numbers and Address information

Workflow: All record details and Manager/Employee assignments

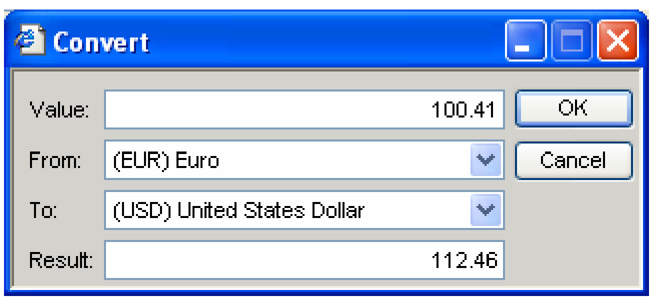
Currency converter

The **Currency converter** permits an expense entry amount to be converted to a different currency using the conversion rates established in DOVICO Timesheet's **Currencies** view.

To convert an expense entry amount:

1. From the Expense entry view, click in the expense's **Amount** field.
2. Click the **converter** button .

   The expense amount is automatically entered in the Value field.
3. Using the **From** drop-down list, select the original currency for the expense.
4. Using the **To** drop-down list, select the currency to convert (normally your company's base currency).
5. Click **OK** to accept the conversion and automatically place the new value in the expense entry's Amount field.



Note: Only the final conversion result is stored in the database. The original (From) and final (To) currencies used in the conversion are not stored. If this information is needed, make note of it in the description field.

Notes and Risks, Phone Numbers and Addresses tabs

For most items (projects, employees, clients, etc..) in DOVICO Timesheet, a series of tabs (**Notes and Risks**, **Phone Numbers** and **Addresses**) are available to add specific information on an item.

To add notes and risks:

1. Select the item from the list (for some views, click the **Properties** button).
2. Click the **Notes and Risks** tab at the bottom of the view or window.
3. In an empty row, type your text in the Notes and Risks column.
4. Select a date from the calendar.
5. Click **Save** or **Done** depending on the type of view.

To add phone numbers:

1. Select the item from the list (for some views, click the **Properties** button).
2. Click the **Phone Numbers** tab at the bottom of the view or window.
3. In an empty row, type the phone number in the Number column.
4. In the Description field, enter reference information for the number.
5. In the **Display** column, select YES to display this phone number in certain reports.
6. Click **Save** or **Done** depending on the type of view.

To add an address:

1. Select the item from the list (for some views, click the **Properties** button).
2. Click the **Addresses** tab at the bottom of the view or window.
3. In an empty row, enter the **Street address information** in the first and second columns.
4. Enter the **City**.
5. Enter the **State** or Province.
6. Enter the **Zip / Postal Code**.
7. In the **Display** column, select YES to display this address in certain reports.
8. Enter the **Web Site** or URL.
9. Enter the **E-mail** address.

Note: When adding an address for a client, select **Display = Yes** for that address to appear on the Invoice report.

To delete a note, phone number or address:

1. Click the **delete** button (at the far right) of the corresponding row to delete.

Filter

Use the **Filter** function to select criteria and only display information meeting those conditions.

The Filter function is most helpful when looking for specific information within a large database or wanting to reduce the records displayed to only those specific teams, projects, etc.

DOVICO Timesheet has 2 types of filters; basic filters (for most views) and Project Assignments view filters. The following describes how to use basic filters. Go to page 55 to learn how to use filtering in the Project Assignments view.

Notes:

- When a filter is applied, the remove filter button is enabled in the toolbar, and in some views "Filter Applied" is displayed in the view's title bar.
- Filters created in a view are personal and are not applied to other users.
- When a filter is applied, it returns data from all the pages in that view.
- Basic filters are temporary and cannot be saved.

To apply a basic filter:

1. Select a view.
2. Click the **Filter** button on the toolbar.

   A Filter window opens containing 2 tabs: Basic and Advanced.
3. Use the **Basic** tab to apply a filter against one or all the fields displayed in the Filter window. When criteria is selected for more than one field, the filter will return only the data that matches all the selected criteria (an AND operation). Note that the drop-down fields displayed in the Basic tab do not necessarily correspond to the columns displayed in the view.
   a. Select **criteria** from one or more **drop-down** lists.
   b. Press **OK** to view the results.

   OR
4. Use the **Advanced** tab to apply a more refined filter against the view's **primary column** (see primary column list on the next page).
   a. Select a logical operator (=, <, >, <=, >=, <>) from the first column.
   b. Enter the filter criteria text in the second field.
   c. (**Optional**) If a second filtering criteria is necessary, select a logical operator from the middle drop-down list (AND, OR) and select/enter data for the 4th and 5th fields.
   d. Press **OK** to view the results.

To remove a filter:

a. Click the **Remove Filter** button on the toolbar.

   OR

b. Move to a different view.

Find

Use the **Find** option to search a view's primary column and display only the information that matches the query.

Tip: Use "*" as a wildcard to broaden the search. For example, to find and display all employees with last names beginning with "D", enter `D*` in the Find box.

If you have many employees with the last name ending with D, there is a way to narrow your search even more. For example, enter `D[a-m]*` to only search for names beginning with D and with the next letter between a and m. Or enter `D[^a-m]*` to search for names beginning with D and whose next letter is not between a and m.

To find items within the primary column:

1. Enter the text to search for in the **Find** box at the top of the view.
2. Press the **Find** button to display matching records.

View	Primary column
Actual Expenses	Date column
Billing	Number column
Clients - Items List	Name column
Currencies	Name column
Employees - Items List	Name column
Expense Categories	Name column
Leave/Absences Rules	Name column
Overtime Rates	Name column
Project Groups	Name column
Projects - Items List	Name column
Rates	Name column
Regions	Name column
Security Groups	Name column
Task Groups - Items List	Name column
Tasks - Items List	Name column
Teams - Items List	Name column
Workflow	Name column

To remove the results of a Find:

1. Delete all text in the Find box and click the **Find** button.

   OR

2. Move to a different view.

Deleting / Unassign

In most views, a **Delete** function is available to delete items (employees, projects, assignments, etc.) from the database.

Careful consideration and caution should be used before using the delete function as once an item has been deleted, it cannot be recovered. An alternative to deleting is to use the **Flag for Archive** option.

> **Tip:** To ensure no one accidentally deletes projects, tasks, etc, create a **new security group(s)**, remove Delete rights to the applicable views and tools for the new security group and then apply it to those employees accessing the administrative functions.

The following points describe the implications of deleting some of the more important elements within DOVICO Timesheet or removing assignments:

Assignments (Unassign)
When you remove an employee, task or project assignment, it will delete estimate/budget information but will not delete timesheet entries made for the project.

If an **employee** is deleted, all the hours worked for that employee are deleted. All expenses entered by the employee are deleted. All related information: hours worked for projects, project costs associated with the employee, estimates created for this employee are also deleted.

If a **task** is deleted, all the hours worked against that task are also deleted. All project costs and estimates associated with the task are also deleted.

If a **task group** is deleted, all assignments made using the task group are deleted along with any estimate information entered for those assignments. Time entries associated with the tasks which belong to the task group are not deleted.

If a **project** is deleted, all the hours worked for that project are deleted. All expenses entered for the project are deleted.

Flag for Archive

For any item in specific views (employees, projects, tasks, rates, etc.), check the **Flag for archive** box if this item is to be removed for the database and placed in the Archive Database.

To archive a database, select the **Archive Database** option from the **Database Manager** tool.

Careful consideration should be taken before archiving an item. The following points describe the implications of archiving some of the more important elements within DOVICO Timesheet:

If an **employee** is archived, all the hours worked for that employee are removed from the source database. All expenses entered by the employee are also removed. All related information: hours worked for projects, project costs associated with the employee, estimates created for this employee are also removed.

If a **task** is archived, all the hours worked against that task are removed from the source database. All project costs and estimates associated with the task are also removed.

If a **task group** is archived, all assignments made using the task group are removed from the source database along with any estimate information entered for those assignments made using task groups. Time entries associated with the tasks belonging to the task group are not removed.

If a **project** is archived, all the hours worked for that project are removed from the source database. All expenses entered for the project are removed.

To flag an item for archive:

1. From the view or properties window, select the **item** to flag for archive.
2. Locate and check the **Flag for archive** check box.
3. Click **Save** or **Done** depending on the type of view.

The next time the Archive Database function is run, all flagged items are removed from the source database and stored in the archive database.

Tips:

- To restore an archived item, search for 'DV1116' in **DOVICO's Knowledge base** (www.dovico.com/techtips.html) for an article detailing how this can be done.
- You can review all items flagged for archive by using the Items Flagged for Archive report.

Task Limit in Timesheet Grid

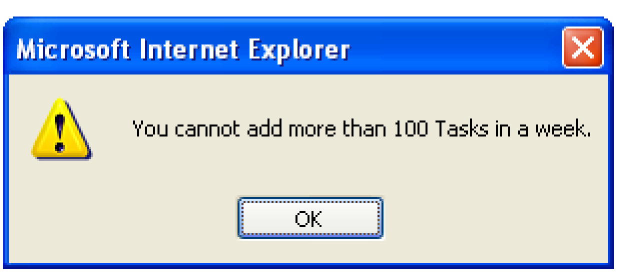
DOVICO Timesheet limits the number of task assignments an employee can add to his/her weekly timesheet grid and add to the Favorites tab. By default, this limit is set to 100 task assignments.

How to modify the Task limit in the timesheet grid:

1. Open the **web.config** file located on the server or computer where DOVICO Timesheet is installed. Normally the file is in: \Inetpub\wwwroot\dovtimesheet
2. Locate and edit the "value" number in the following line:

```
<setting name="TimesheetTaskGridLimit" serializeAs="String">
     <value>100</value>
```

3. Save the changes to the file.
4. You may be required to restart the '**World Wide Web Publishing**' Service before the change takes effect.



Compliancy - Conforming to Government Regulations, Standards and Guidelines

DOVICO Timesheet is a powerful time tracking software application that assists your company in adhering to many regulatory standards and quality control guidelines for the collection of timesheet information. Through our Audit trail, timesheet approval paths and other built in security, your company will exceed corporate governance, labor and industry regulations.

Conforming to specific standards:

Sarbanes-Oxley Act (SOX, Sarbox)
The Sarbanes-Oxley Act (SOX, Sarbox) is a U.S. Congressional act passed to prevent future corporate financial scandals. The act requires businesses to handle payroll, administration, IT and other financial processes in a specific way to avoid inaccuracy, fraud etc. DOVICO Timesheet assists in this regulation by gathering accurate time metrics for payroll, billing or other purposes.

To be SOX compliant, clients should:

- Set Audit Trail to Medium level.
- Apply Timesheet Approval Workflows to force supervisors/managers to approve all time entries.
- Use Security to limit access to the Time Calendar view to the Administrator, or designate, thus preventing modifications to approved time entries.
- Use On Demand training for all staff.

U.S. Defense Contract Audit Agency (DCAA)
The Defense Contract Audit Agency (DCAA) is responsible for performing all contract audits for the Department of Defense (DoD), and providing accounting and financial advisory services regarding contracts and subcontracts to all DoD components responsible for procurement and contract administration. DOVICO Timesheet is DCAA compliant (section 5-900, DCAA Contract Audit Manual).

To be DCAA compliant, clients should:

- Set Audit Trail to Detailed level.
- Apply Timesheet Approval Workflows to force supervisors/managers to approve all time entries.
- Use Security to limit access to the Time Calendar view to the Administrator or designate thus preventing modifications to approved time entries.
- Use the time entry description field to note reason for any changes to approved time entries by Administrators.
- Employees should only work on specifically assigned projects and tasks; no Global assignments.
- Use Job Scheduler to automatically notify employees of their assigned tasks.
- Use free On Demand training for all staff.
- Set Job Scheduler for Automated Database Backups.

U.S. Central Contractor Registration (CCR)
Since October 1, 2003, it is federally mandated that any business wishing to do business with the federal government under a FAR-based contract must be registered in CCR before being awarded a contract. You will be pleased to know that DOVICO Timesheet is directly available to all U.S. Government agencies through requisition from the CCR database.

To inquire within the CCR database:

- Duns# 258845023
- Cage/NCage Code L1335

Capability Maturity Model Integration (CMMI®)
Capability Maturity Model Integration (CMMI®) is a process improvement approach that provides organizations with the essential elements of effective processes. It can be used to guide process improvement across a project, a division, or an entire organization. CMMI helps integrate traditionally separate organizational functions, set process improvement goals and priorities, provide guidance for quality processes, and provide a point of reference for appraising current processes. Besides DOVICO being a CMMI® based company, our DOVICO Timesheet also assists with this strategic improvement.

To use our software for CMMI, clients should:

- Set Audit Trail to Low level.
- Apply Timesheet Approval Workflows to force supervisors/managers to approve all time entries.
- Use Security to limit access to the Time Calendar view to the Administrator or designate thus preventing modifications to approved time entries.
- Monitor, analyze and improve projects based upon time metrics.

Six Sigma
Six Sigma is a rigorous and disciplined methodology that uses data and statistical analysis to measure and improve a company's operational performance by identifying and eliminating "defects" in manufacturing and service-related processes. DOVICO Timesheet adheres to Six Sigma's methodology and is core to the process.

To use our software for Six Sigma, clients should:

- Set Audit Trail to Low level.
- Apply Timesheet Approval Workflows to force supervisors/managers to approve all time entries.
- Use Security to limit access to the Time Calendar view to the Administrator or designate thus preventing modifications to approved time entries.
- Monitor, analyze and improve projects based upon time metrics.

SR&ED (Canadian Tax Credits)
Scientific Research & Experimental Development (SR&ED) is one of the largest sources of the Canadian government's support for businesses. Within the SR&ED program, businesses may receive funding towards the development of new, improved, or technologically advanced products. Our DOVICO Timesheet assists with tracking the time associated with the projects and makes the project estimation, and billing (claims) process much easier.

To use our software for SR&ED Tax Credits, clients should:

- Set Audit Trail to Low level.
- Apply Timesheet Approval Workflows to force supervisors/managers to approve all time entries.
- Use Security to limit access to the Time Calendar view to the Administrator or designate thus preventing modifications to approved time entries.

Note: DCAA, DoD, CMMI, Sarbanes-Oxley (SOX), and Six Sigma are all trademarks of their associated organizations. Compliance standards are more than just a technology issue; it is the processes and controls of the organization that need to be certified as compliant. The above regulatory conditions were checked for software adherence on July 27th 2006.

PART

3

Integration

DOVICO Timesheet's Integration section contains the built-in functionality permitting data to be linked to QuickBooks, Microsoft Project/Project Server or Active Directory.

Also included is the Import/Export tool useful to communicate information between DOVICO Timesheet and other applications in various formats (text, comma separated, html, xml, etc).

In Integration …

Microsoft Project

Use DOVICO Timesheet's **Microsoft Project** Link to link project and task assignments created in Microsoft Project or Microsoft Project Server to DOVICO Timesheet.

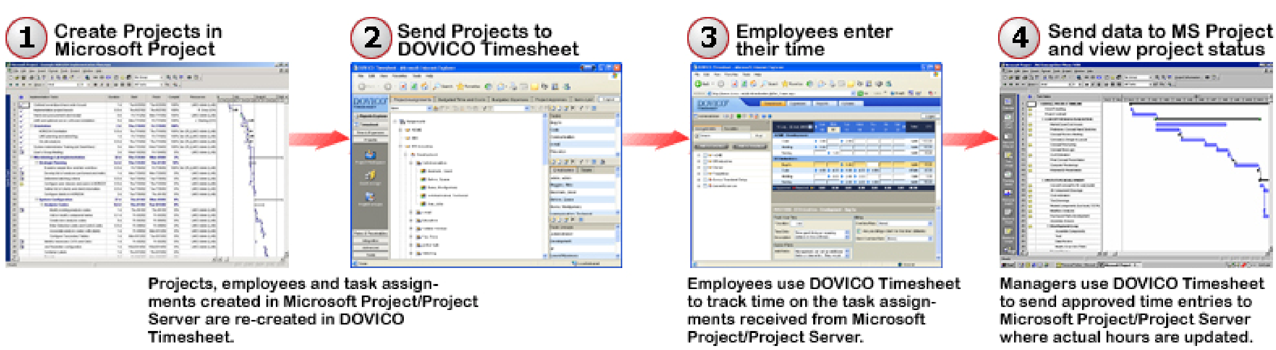
Microsoft Project overview:

1. Projects, employees and task assignments created in Microsoft Project/Project Server are re-created in DOVICO Timesheet.
2. Employees use DOVICO Timesheet to track time on the task assignments received from Microsoft Project/Project Server.
3. Managers use DOVICO Timesheet to send approved time entries to Microsoft Project/Project Server where actual hours are updated.

Important notes about using the Microsoft Project Link:

- DOVICO Timesheet can link with Microsoft Project 2007, Microsoft Project Server 2007, Microsoft Project 2003, Microsoft Project Server 2003, Microsoft Project 2002 and Microsoft Project Server 2002.
- The Microsoft Project Link and the Microsoft Project Server Link cannot be used together on the same DOVICO Timesheet database. Once a link is established using one link type, the other is not accessible to any user. To use the other link type, a **new database** must be created.

See **Microsoft Project Link** (page 186) to establish a link to Microsoft Project files.
See **Microsoft Project Server Link** (page 193) to establish a link to Microsoft Project Server files.
An **overview** of the information transferred using the Microsoft Project Link is found on page 199.



Prerequisite:

The Microsoft Project link requires **ActiveX** controls to be installed, and enabled, on the computer where Microsoft Project/Project Server Link is used. Therefore only web browsers capable of supporting ActiveX controls can be used to link Microsoft Project/Project Server files to DOVICO Timesheet.

When you access either the Microsoft Project Link or the Microsoft Project Server Link, DOVICO Timesheet will determine if ActiveX controls are installed. When not installed, the browser will attempt to download and install the required components.

There are 3 major reasons why you might be experiencing difficulties installing the ActiveX controls:

- The browser does not support ActiveX controls.
- Insufficient administrative privileges on the computer to register an ActiveX control.
- The site where you are accessing DOVICO Timesheet from should be added to your Trusted Sites list. By default, that will contain the browser rights needed to install the ActiveX controls (if you have sufficient administrative rights).

If the problem persists, please contact your system administrator. Note that limited functionality is possible for Microsoft Project Server using a web browser without ActiveX controls.

Microsoft Project Link

The following describes the 3 fundamental steps required to **setup** and **synchronize data** from Microsoft Project to DOVICO Timesheet. Details on how to send time entries from DOVICO Timesheet to Microsoft Project are described in **Send time to Microsoft Project** on page 191.

STEP 1: Create a resource pool (list of employees) using Microsoft Project.

STEP 2: Create the project and tasks and assign resources to each task using Microsoft Project.

STEP 3: Use DOVICO Timesheet to synchronize projects, employees and task assignments from the Microsoft Project file.

Prerequisite:

- The Microsoft Project link requires **ActiveX** controls and therefore only web browsers capable of supporting ActiveX controls can be used to link Microsoft Project files to DOVICO Timesheet.

The following describes how to create a link to a **new** Microsoft Project file. If you are creating a link to an **existing** Microsoft Project file, follow the instructions found in DOVICO Timesheet's help files (**Creating a link to an existing Microsoft Project file**).

Notes:
- Microsoft Project must be installed on the computer or workstation where the Microsoft Project Link option is used.
- If the ActiveX control fails to load either due to the browser's security settings or due to the browser's ability, a message is displayed at the bottom of the view.

STEP 1: Create a Resource Pool
To prepare employee project and task assignment files used for time entry, you must first create a list of employees who will be assigned to those projects and tasks. The employee list is created using a resource pool in Microsoft Project. Resources (or employees) entered in the pool can be shared between all Microsoft Project projects. When a Microsoft Project resource pool is linked to DOVICO Timesheet, employees assigned to each project are automatically added to the DOVICO Timesheet database.

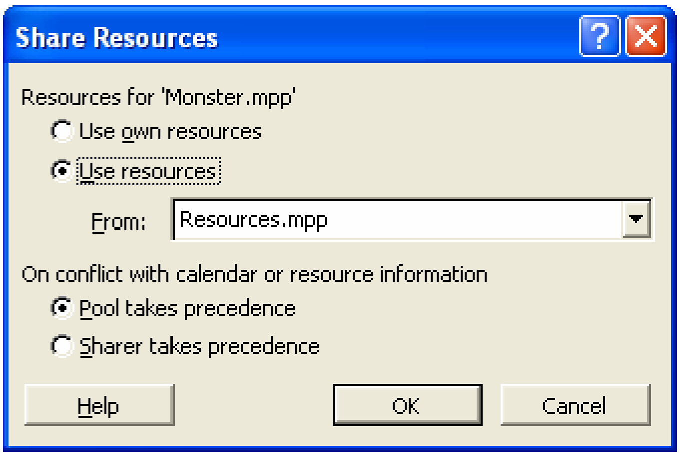
Warning: If an employee entered in the Resource Pool already exists in DOVICO Timesheet, that employee will be duplicated in DOVICO Timesheet the first time the link is created. To prevent this, search for **DV1016** in **DOVICO's Knowledge Base** http://www.dovico.com/techtips.html

1. Start **Microsoft Project**.
2. Select **File**, **New**.
3. Select **View**, **Resource Sheet**.
4. Create the **employee** names for all resources. Names should be entered as First Name then Last Name. Employee names must include both a first and last name to be successfully imported into DOVICO Timesheet.
5. Select **Tools**, **Resources Sharing**, **Share Resources**.
6. Select **Use own resources** and click **OK**.
7. **Save** the file (example: Resources.mpp). If this resource pool file is to be shared, it should be saved in a shared folder on a network accessible to all managers using DOVICO Timesheet.
8. **Close** the file.

Note: If a synchronized employee in the Microsoft Project resource pool file is ever deleted, that employee will remain in the DOVICO Timesheet database and therefore existing time entries will not be removed.

STEP 2: Create a project and tasks, and assign employees to each task

1. Start **Microsoft Project**.
2. Select **File**, **Open** and select the resource pool file previously created in Step 1.
3. Select **File**, **New** and create a new (blank) project.
4. Select **Tools**, **Resources Sharing**, **Share Resources**.
5. Select the **Use resources** option and select the **resource file** (opened in step 2 above) from the drop-down list and click **OK**.



6. **Create** the project plan and its tasks.

7. For each task entered, assign an employee from the resource pool.

Notes:

- DOVICO Timesheet only supports the lowest level task assignments in Microsoft Project. Assignments made to group level tasks are not supported.

		WBS	Task Name	Resource Names
1		**1**	**Communication**	
2		1.1	Phone	
3		**1.2**	**Meeting**	**John Walker**
4		1.2.1	Correspondence	
5		**2**	**Reasearch & Development**	**John Doe**
6		**2.1**	**Data Entry**	
7		**2.1.1**	**Programming**	**John Doe**
8		2.1.1.1	Bug Fix	

		WBS	Task Name	Resource Names
1		**1**	**Communication**	
2		1.1	Phone	John Doe
3		**1.2**	**Meeting**	
4		1.2.1	Correspondence	John Walker
5		**2**	**Reasearch & Development**	
6		**2.1**	**Data Entry**	
7		**2.1.1**	**Programming**	
8		2.1.1.1	Bug Fix	John Doe

- DOVICO Timesheet does not support blank rows in a Microsoft Project file. Any blank rows within a Microsoft Project file must be removed prior to creating the link.

8. **Save** the file. This file should be saved in a shared folder on the Network accessible to all managers using DOVICO Timesheet.
9. **Exit** Microsoft Project.

STEP 3: Create a link in DOVICO Timesheet

When a link is created:

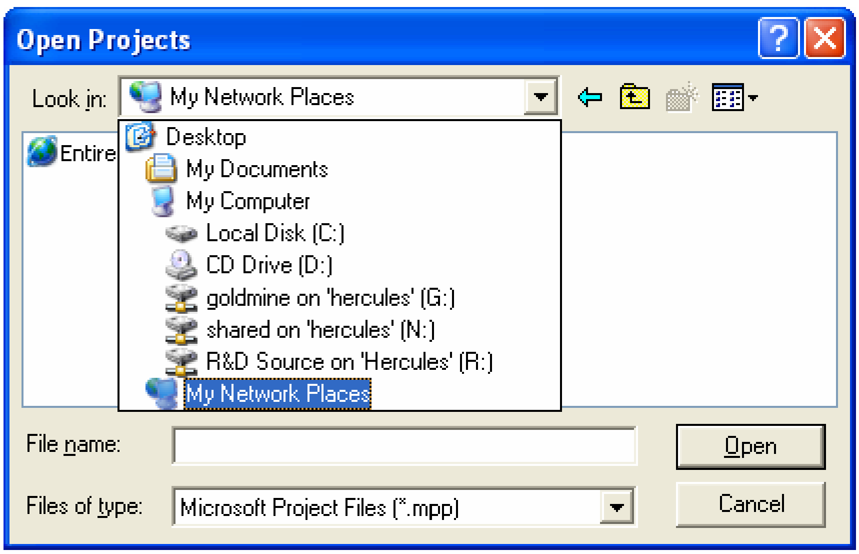
- The project (with an mpp extension) is added to the list of projects in DOVICO Timesheet. You can edit project information in DOVICO Timesheet without affecting the link or Microsoft Project files.
- The employees are added to the list of employees in the DOVICO Timesheet database.
- Tasks are not added to the list of tasks in DOVICO Timesheet. However, the tasks are displayed in the Project Assignments view and are available to employees entering time.

1. Exit Microsoft Project if it is currently running. This step is very important to ensure that the link is properly created.
2. Select **Microsoft Project**  from the Integration section of the side navigation bar.

3. Select the **Project Link** tab.
4. Click the **Add Resources** button located below the Resource list box.

> **Note**: If resources are already listed in the Resources list box, the label on this button will read Get Resources and clicking it will cause the resource list to be updated.

5. In the Look in box, use **Network Neighborhood** or **My Network Places** to find and select the **resource file** created in the previous steps. **Do not use a Mapped Network Drive** to locate the file. Using Network Neighborhood or My Network Places creates a Universal Naming Convention (UNC) and ensures that the file is accessible by everyone.



6. Click **Open**.

   The employees listed in the resource pool file are displayed in the Resource list and are added to the Project Assignment view's employee list.

Microsoft Project		DOVICO Timesheet
Resource first name		Employee first name
Resource last name		Employee last name
Resource email address (optional)		Employee email address

7. For each employee added, you will need to edit their **User ID** and **Password** information as random data is entered in these fields when an employee is added from the resource pool. You will also need to modify the **Software access** field for each new employee as 'None' is selected by default. Use either the **Project Assignment view's employee list** or the **Items List - Employees view** to edit this information.

   The employees have now been imported into DOVICO Timesheet. The next steps involve importing the Microsoft Project file and its tasks.

8. Click the **Add Project** button located below the Project list box.

9. In the Look in box, use **Network Neighborhood** or **My Network Places** to find and select the **project file** created in the previous steps. **Do not use a Mapped Network Drive** to locate the file.
10. Click **Open**. The project, its tasks and assignments are added to DOVICO Timesheet. The project (with the mpp extension) and its tasks are displayed in the Project Assignments view. Changes to assignments can only be accomplished using Microsoft Project.

Microsoft Project		DOVICO Timesheet
Projects	➔	Projects
Tasks	➔	Tasks
Resource Assignments	➔	Task Assignments
Work	➔	Estimate hours
Assignment Start and Finish dates	➔	Assignment Start and Finish dates
WBS code (optional)	➔	WBS code

The project assignments are now created in DOVICO Timesheet and employees can begin tracking their time against this project.

Instructions on how to **send time** from DOVICO Timesheet to the Microsoft Project file are found on the next page.

Notes:

- If you edit a project plan file in Microsoft Project, you will need to **re-synchronize** by selecting the file from the Project List box and clicking **Get Assignments**.
- If you rename or move the Microsoft Project file, the link will be broken and you will receive an error message when trying to send time. To repair a broken link, select the project from the Project List box and click the **Change Link** button to locate the file. Only one project should be selected from the Project List box before the Change Link button is used.

Sending time to Microsoft Project

The following describes how to send approved time from DOVICO Timesheet to Microsoft Project. The following assumes working knowledge of Microsoft Project and its terminology.

An **overview** of the information transferred using the Microsoft Project Link is found on page 199.

To send time to Microsoft Project files:

1. **Exit** Microsoft Project if it's currently running.
2. Select **Microsoft Project** from the Integration section of the side navigation bar.
3. Select one or more **projects** from the Project list box.

   When DOVICO Timesheet sends time to Microsoft Project, it sends the time as total hours (or additional hours). No information regarding the dates when time was actually worked is sent to Microsoft Project. Microsoft Project places the hours received from DOVICO Timesheet in its scheduled period or around the project status date (see step 5 below).

   Simplified example: In DOVICO Timesheet, for a given task, 2 hours are entered on Monday, 3 hours on Tuesday and 4 hours on Friday. When this time is sent from DOVICO Timesheet to Microsoft Project, a total of 9 hours are sent and Microsoft places these 9 hours in its scheduled period. If the scheduled period was Monday through Friday, 8 hours will be placed on Monday and 1 hour will appear on Tuesday.

4. Click the **Send Time** button located below the Resource list box.
5. A pop-up window opens showing the previous project status date and how many hours are ready to be submitted for each project selected in step 3.

   If the selected project has an established previous status date, you should continue to use the Status Date option, otherwise you may experience unexpected results within Microsoft Project.

   Two options are available when sending time to Microsoft Project:

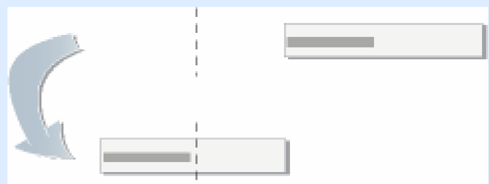
   Status date:

   - When **un-checked** and if the Microsoft Project file has no preset Project Status date, **all time is sent** to Microsoft Project regardless of when it was worked and is placed in the time period in which it was planned in Microsoft Project. If the Microsoft Project file has a preset Project Status date, the time sent is placed according to the project status date.
   - When **checked**, only time **worked on or before the project status date** is sent to Microsoft Project. In Microsoft Project, the time worked and remaining work are scheduled around the project status date. Using this option permits the Microsoft Project plan to be re-leveled and then synchronized with DOVICO Timesheet (Get Assignments) so employees can see their revised scheduled task dates.

     - Check the **Use status date** checkbox.
     - Click the **calendar icon** to select a status date. Normally, the project status date is set to the end of the reporting period.
     - Click **Refresh** to update the summary information.

For work done on a task scheduled **on** or **before** the project status date, Microsoft Project places the actual time worked (received from DOVICO Timesheet) in the period it was originally scheduled for in Microsoft Project. Any remaining work portions are moved after the status date.

For work done on a task that is scheduled **after** the project status date, Microsoft Project places the actual time somewhere before the status date and moves any remaining work after the status date.



Based on your project's task dependencies, the remaining work portions will likely not appear next to the project status date as displayed in these simplified diagrams.

<u>Send ETC</u>:

- When checked, the **ETC** values entered by the employees are sent to Microsoft Project as **Remaining Work**. The Duration and % Complete fields in Microsoft Project are automatically updated. Task Finish dates are adjusted based upon the Actual Work and ETC fields.
- When un-checked, no ETC values are sent to Microsoft Project.

6. Click **OK**.

Approved time is sent to the Microsoft Project file.

DOVICO Timesheet		Microsoft Project
Approved time		Actual Work
ETCs (optional)		Remaining Work
Status date (optional)		Project Status date

Notes:

- Only approved time in DOVICO Timesheet is sent to Microsoft Project.
- The list of projects displayed in the Project list box may be limited if **Limited Access** to projects is applied to the user.
- In Microsoft Project, if **no ETCs** are received from DOVICO Timesheet, the Remaining Work is equal to Work minus Actual Duration.
- If a time entry is deleted from DOVICO Timesheet, the corresponding time will not be removed from Microsoft Project.
- If using the Project Status date option, you may find that some uncompleted tasks are not automatically moved past the Status date. You can control whether or not uncompleted work is rescheduled. Search for "Reschedule uncompleted work" in Microsoft Project's help file.

Tip: Press the **Synchronize All** button to automatically Get Resources, Get Assignments and Send Time for the selected projects.

Microsoft Project Server Link

Use DOVICO Timesheet's **Microsoft Project Server** Link to link project and task assignments created in Microsoft Project Server to DOVICO Timesheet. When a link is created, employees use DOVICO Timesheet to track time on the task assignments created in Microsoft Project Server. When time entries are submitted and approved, the actual hours worked are updated in Microsoft Project Server files.

The following describes the fundamental steps required to **setup** and **synchronize data** from Microsoft Project Server to DOVICO Timesheet. Details on how to send time entries from DOVICO Timesheet to Microsoft Project Server are described in **Send time to Microsoft Project Server** on page 197.

STEP 1: Establish the connection to Microsoft Project Server.

STEP 2: Synchronize the Resource pool.

STEP 3: Synchronize projects, employees and task assignments from the Microsoft Project Server file.

Prerequisite:

- The Microsoft Project Server link requires **ActiveX** controls and therefore only browsers capable of supporting ActiveX controls can be used to link Microsoft Project Server files to DOVICO Timesheet. Limited functionality is available without ActiveX controls, see Notes below.

Notes:

- Limited functionality is available when using Microsoft Project Server Link on a browser without ActiveX controls. Functionality is limited to Get Resources, Add Projects, Get Assignments and Change Links.
- Microsoft Project must be installed on the computer or workstation where the Microsoft Project Server Link option is used.
- If the ActiveX control fails to load either due to the browser's security settings or due to the browser's ability, a message is displayed at the bottom of the view.

STEP 1: **Establish connection information**

1. Select **Microsoft Project**  from the Integration section of the side navigation bar.
2. Select the **Project Server Link** tab.
3. In the Connection Information area, enter the **Microsoft Project Server URL**.
4. Enter the Microsoft Project Server Authentication **User ID** and **Password**.
5. Click the **Apply** button.

Warning: Before moving to the next step you must ensure that you have added a **Microsoft Project Server Account** in Microsoft Project under **Tools**, **Enterprise Options**, **Microsoft Office Project Server Accounts**. After which you will be prompted to connect to a Microsoft Project Server Account each time you access Microsoft Project.

STEP 2: Synchronize the Resource pool

When a Microsoft Project Server resource pool is linked to DOVICO Timesheet, employees assigned to each project are automatically added to the DOVICO Timesheet database.

Warnings:

- If an employee entered in the Microsoft Project Server Resource Pool already exists in DOVICO Timesheet, that employee will be duplicated in DOVICO Timesheet the first time the link is created.
- Employee names must include both a first and last name to be successfully imported into DOVICO Timesheet.

1. Start **Microsoft Project Server**.
2. From DOVICO Timesheet, select the **Project Server Link** tab.
3. Click the **Get Resources** button located below the Resource list box.

Microsoft Project Server		DOVICO Timesheet
Resource first name	➔	Employee first name
Resource last name	➔	Employee last name
Resource email address (optional)	➔	Employee email address

4. For each employee added, you will need to edit their **User ID** and **Password** information as random data is entered in these fields when an employee is added from the resource pool. You will also need to modify the **Software access** field for each new employee as 'None' is selected by default. Use either the **Project Assignment view's employee list** or the **Items List - Employees view** to edit this information.

Note: If a synchronized employee in the Microsoft Project Server resource pool file is ever deleted, that employee will remain in the DOVICO Timesheet database.

STEP 3: Create a link in DOVICO Timesheet

When a link is created:

- The project is added to the list of projects in DOVICO Timesheet. You can edit project information in DOVICO Timesheet without affecting the link or Microsoft Project Server files.
- Tasks are not added to the list of tasks in DOVICO Timesheet. However, the tasks are displayed in the Project Assignments view and are available to employees entering time.

Prerequisite:

- DOVICO Timesheet only supports task assignments from the bottom level tasks in the Microsoft Project Server file.

Notes:

- DOVICO Timesheet only supports the lowest level task assignments in Microsoft Project. Assignments made to group level tasks are not supported.

		WBS	Task Name	Resource Names
1		**1**	**Communication**	
2		1.1	Phone	
3		**1.2**	**Meeting**	**John Walker**
4		1.2.1	Correspondence	
5		**2**	**Reasearch & Development**	**John Doe**
6		**2.1**	**Data Entry**	
7		**2.1.1**	**Programming**	**John Doe**
8		2.1.1.1	Bug Fix	

		WBS	Task Name	Resource Names
1		**1**	**Communication**	
2		1.1	Phone	John Doe
3		**1.2**	**Meeting**	
4		1.2.1	Correspondence	John Walker
5		**2**	**Reasearch & Development**	
6		**2.1**	**Data Entry**	
7		**2.1.1**	**Programming**	
8		2.1.1.1	Bug Fix	John Doe

- DOVICO Timesheet does not support blank rows in a Microsoft Project file. Any blank rows within a Microsoft Project file must be removed prior to creating the link.

1. Click the **Add Project** button located below the Project list box.
2. A pop-up window opens listing all Microsoft Project Server projects not currently linked to DOVICO Timesheet.
3. Select a **project** from the list and click **OK**.
4. The project, its tasks and assignments are added to DOVICO Timesheet. The project (with the "published" extension) and its tasks are displayed in the Project Assignments view. Changes to assignments can only be accomplished using Microsoft Project.

Microsoft Project Server		DOVICO Timesheet
Projects	➔	Projects
Tasks	➔	Tasks
Resource Assignments	➔	Task Assignments
Work	➔	Estimate hours
Assignment Start and Finish dates	➔	Assignment Start and Finish dates
WBS code (optional)	➔	WBS code

The project assignments are now created in DOVICO Timesheet and employees can begin tracking their time against this project.

Instructions on how to **send time** from DOVICO Timesheet to the Microsoft Project Server file begin on the next page.

Notes:

- WBS codes are only communicated to DOVICO Timesheet when they have been defined in Microsoft Project Server (From Microsoft Project Server, select Project | WBS | Define Code).
- If you edit a project plan file in Microsoft Project Server, you will need to **re-synchronize** by selecting the file from the Project List box and clicking **Get Assignments**.
- If you rename or move the Microsoft Project Server file, the link will be broken and you will receive an error message when trying to send time. To repair a broken link, select the project from the Project List box and click the **Change Link** button to locate the file. Only one project should be selected from the Project List box before the Change Link button is used.

Sending time to Microsoft Project Server

The following describes how to send approved time from DOVICO Timesheet to Microsoft Project Server.

An **overview** of the information transferred using the Microsoft Project Link is found on page 199.

To send time to Microsoft Project Server files:

1. **Login** to Microsoft Project Server.
2. From DOVICO Timesheet, select **Microsoft Project**  from the Integration section of the side navigation bar.
3. Select one or more **projects** from the Project list box.

   When DOVICO Timesheet sends time to Microsoft Project, it sends the time as total hours (or additional hours). No information regarding the dates when time was actually worked is sent to Microsoft Project. Microsoft Project places the hours received from DOVICO Timesheet in its scheduled period or around the project status date (see step 5 below).

   Simplified example: In DOVICO Timesheet, for a given task, 2 hours are entered on Monday, 3 hours on Tuesday and 4 hours on Friday. When this time is sent from DOVICO Timesheet to Microsoft Project, a total of 9 hours are sent and Microsoft places these 9 hours in its scheduled period. If the scheduled period was Monday through Friday, 8 hours will be placed on Monday and 1 hour will appear on Tuesday.

4. Click the **Send Time** button located below the Resource list box.
5. A pop-up window opens showing the previous status date and how many hours are ready to be submitted for each project selected in step 3.

   If the selected project has an established previous status date, you should continue to use the Status Date option, otherwise you may experience unexpected results within Microsoft Project.

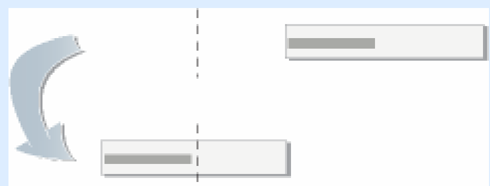
   Two options are available when sending time to Microsoft Project Server:

   Status date:

   - When **un-checked** and if the Microsoft Project file has no preset Project Status date, **all time is sent** to Microsoft Project regardless of when it was worked and is placed in the time period in which it was planned in Microsoft Project. If the Microsoft Project file has a preset Project Status date, the time sent is placed according to the project status date.
   - When **checked**, only time **worked on or before the project status date** is sent to Microsoft Project. In Microsoft Project, the time worked and remaining work are scheduled around the project status date. Using this option permits the Microsoft Project plan to be re-leveled and then synchronized with DOVICO Timesheet (Get Assignments) so employees can see their revised scheduled task dates.
     - Check the **Use status date** checkbox.
     - Click the **calendar icon** to select a status date. Normally, the project status date is set to the end of the reporting period.
     - Click **Refresh** to update the summary information.

For work done on a task scheduled **on** or **before** the project status date, Microsoft Project places the actual time worked (received from DOVICO Timesheet) in the period it was originally scheduled for in Microsoft Project. Any remaining work portions are moved after the status date.

For work done on a task that is scheduled **after** the project status date, Microsoft Project places the actual time somewhere before the status date and moves any remaining work after the status date.



Based on your project's task dependencies, the remaining work portions will likely not appear next to the project status date as displayed in these simplified diagrams.

Send ETC:

- When checked, the **ETC** values entered by the employees are sent to Microsoft Project as **Remaining Work**. The Duration and % Complete fields in Microsoft Project are automatically updated. Task Finish dates are adjusted based upon the Actual Work and ETC fields.
- When un-checked, no ETC values are sent to Microsoft Project.

6. Click **OK**.

Approved time is sent to the Microsoft Project file.

DOVICO Timesheet		Microsoft Project Server
Approved time		Actual Work
ETCs (optional)		Remaining Work
Status date (optional)		Project Status date

Notes:

- Only approved time in DOVICO Timesheet is sent to Microsoft Project.
- The list of projects displayed in the Project list box may be limited if **Limited Access** to projects is applied to the user.
- In Microsoft Project, if **no ETCs** are received from DOVICO Timesheet, the Remaining Work is equal to Work minus Actual Duration.
- If a time entry is deleted from DOVICO Timesheet, the corresponding time will not be removed from Microsoft Project Server.
- If using the Project Status date option, you may find that some uncompleted tasks are not automatically moved past the Status date. You can control whether or not uncompleted work is rescheduled. Search for "Reschedule uncompleted work" in Microsoft Project Server's help file.

Tip: Press the **Synchronize All** button to automatically Get Resources, Get Assignments and Send Time for the selected projects.

Data transferred using Microsoft Project/Project Server

The following provides details on the data transferred between DOVICO Timesheet and Microsoft Project/Project Server when specific actions are performed using the Microsoft Project or Microsoft Project Server Link.

The following assumes the reader has working knowledge of Microsoft Project and DOVICO Timesheet's Microsoft Project/Project Server Link.

Add/Get Resources

Clicking the Add/Get Resources button transfers all employees from the Microsoft Project/Project Server Resource pool to the DOVICO Timesheet database. If Get Resources is selected a second time, only new and modified employees are synchronized back to DOVICO Timesheet. After its initial use, the Add/Get Resources button only needs to be used when modifications or additions are made to the Microsoft Project/Project Server resource pool.

The employee first and last names and email addresses are transferred from Microsoft Project to DOVICO Timesheet. Employee properties are editable in DOVICO Timesheet except for the employee's First and Last name.

Microsoft Project/Project Server		DOVICO Timesheet
Resource first name	→	Employee first name
Resource last name	→	Employee last name
Resource email address (optional)	→	Employee email address

Add Projects

Clicking the Add Project button transfers the selected project, its tasks and resource assignment details from Microsoft Project/Project Server to DOVICO Timesheet. The Add Project button is only required when a new project is sent from Microsoft Project/Project Server to DOVICO Timesheet.

The **project** is added to the DOVICO Timesheet database and its properties are editable using DOVICO Timesheet.

Tasks are not added to the DOVICO Timesheet's Tasks view but are displayed in the Project Assignments view, Budgeted Time & Costs view and to employees entering time.

Task assignment information transferred is limited to the resources (employees) assigned to the tasks, the tasks' scheduled Start and Finish dates, the estimated hours and the task assignments' WBS codes. The assignments are displayed in the Project Assignments view, and the task assignment details can be viewed using the Budgeted Time & Costs view. The task assignments budget information cannot be edited using DOVICO Timesheet (Estimated hours, Adjusted hours, Start and Finish dates and WBS codes).

Microsoft Project/Project Server		DOVICO Timesheet
Projects	→	Projects
Tasks	→	Tasks

Resource Assignments	→	Task Assignments
Work	→	Estimate hours
Assignment Start and Finish dates	→	Assignment Start and Finish dates
WBS code (optional)	→	WBS code

Get Assignments

Clicking the Get Assignments button updates the task assignments information from Microsoft Project/Project Server to DOVICO Timesheet. That is; resources assigned to the tasks, new tasks (if any), task scheduled Start and Finish dates, estimated hours and WBS codes. This function should be used after modifications are made to the Microsoft Project/Project Server plan file.

Microsoft Project/Project Server		DOVICO Timesheet
Tasks	→	Tasks
Resource Assignments	→	Task Assignments
Work	→	Estimate hours
Assignment Start and Finish dates	→	Assignment Start and Finish dates
WBS code (optional)	→	WBS code

Send Time

Clicking the Send Time button sends approved time from DOVICO Timesheet to Microsoft Project/Project Server.

Approved time is sent as new (or additional) hours per assignment and appears as Actual Work in Microsoft Project/Project Server.

If selected, **ETC** values (in hours) are transferred from DOVICO Timesheet to Microsoft Project/Project Server. These appear as Remaining Work in Microsoft Project/Project Server.

- If selected, the **project status date** is transferred from DOVICO Timesheet to Microsoft Project/Project Server.

DOVICO Timesheet		Microsoft Project/Project Server
Approved time	→	Actual Work
ETCs (optional)	→	Remaining Work
Status date (optional)	→	Project Status date

Synchronize All

Clicking the Synchronize All button will perform the functions, described above, in the following order: Get Resources, Get Assignments and Send Time.

QuickBooks

The **QuickBooks** link permits employee timesheet information to be sent from DOVICO Timesheet to QuickBooks for accurate billing purposes.

Every time the QuickBooks integration tool is launched, a program file is downloaded from the computer or server where DOVICO Timesheet is installed. The program file contains all the necessary functionality to synchronize time to QuickBooks.

QuickBooks System Requirements:

- The operating system used must be Windows 98 or higher.
- Microsoft .NET Framework version 2.0 must be installed on the operating system in use.
- A direct connection to the SQL database where DOVICO Timesheet resides (this requires a LAN/Intranet setup or a VPN).
- US, UK and CDN QuickBooks versions 2005 or above.
    - For Windows Vista, versions 2006 and below are not supported.

To launch QuickBooks Integration:

1. Start **QuickBooks**.
2. From DOVICO Timesheet, select **QuickBooks** from the Integration section of the side navigation bar and click the link labeled "**Click on this link to run the QuickBooks link.**" in the view on the right.
3. Select **Open**, or save and open the file (TimesheetApplicationLauncher.exe).

Notes:

- If the 'TimesheetApplicationLauncher.exe' file is saved (in step 3 above), it should be deleted after using QuickBooks Link.
- The QuickBooks Link can only link with 1 QuickBooks file.
- The QuickBooks Link cannot be used with DOVICO Timesheet's Hosted Online solution.

QuickBooks Setup

Because DOVICO Timesheet and QuickBooks use different terminology, a list of field name cross references is provided on page 204. However you can customize DOVICO Timesheet terminology according to your needs (e.g. change client to customer so that it matches QuickBooks).

- A client in DOVICO Timesheet is considered a customer in QuickBooks.
- A project in DOVICO Timesheet is considered a job in QuickBooks.
- A task in DOVICO Timesheet is considered a service item in QuickBooks.

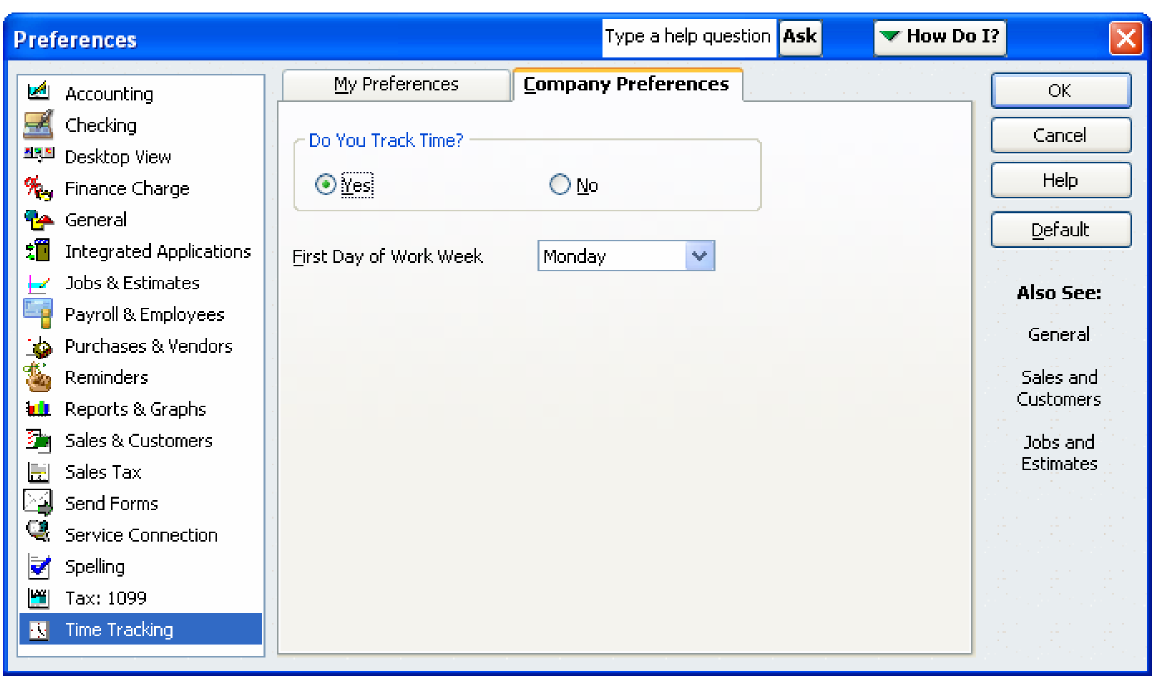
Setup Prerequisites:

Before linking with QuickBooks, some preparation is necessary. Please ensure that the **setup instructions** which follow have been **completed**.

STEP 1
Open a **Company** in QuickBooks before launching the DOVICO Timesheet's QuickBooks link.

STEP 2
Time Tracking must be turned on in QuickBooks to synchronize timesheets:

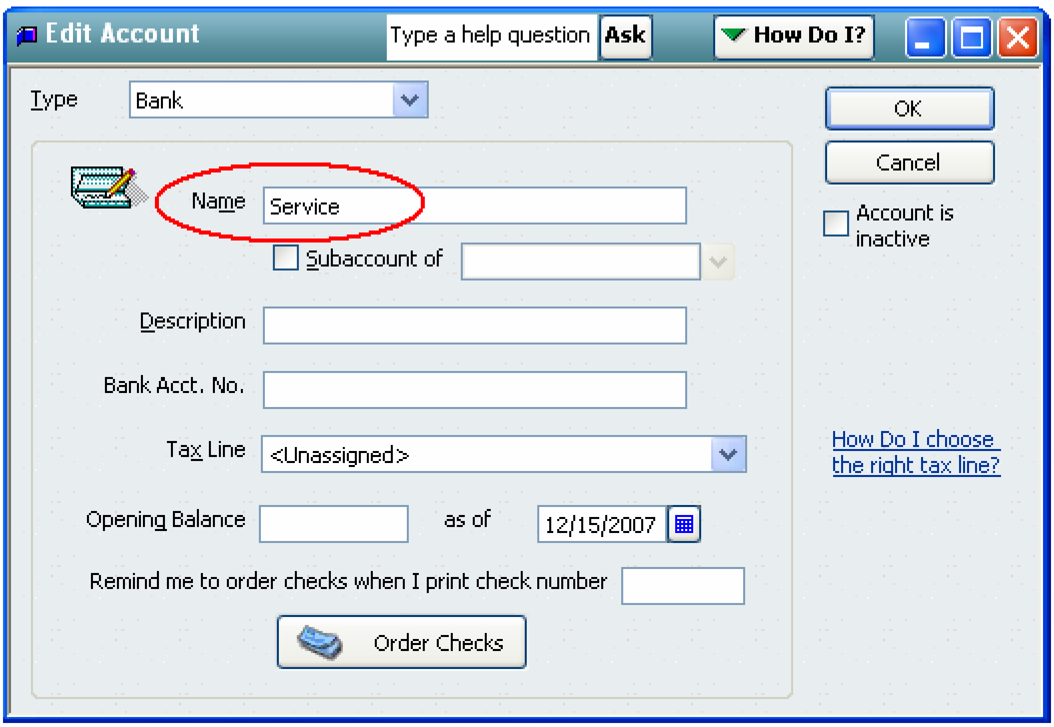
a) From QuickBooks, select **Edit**, **Preferences**.
b) Locate and select **Time Tracking** in the left side navigation bar.
c) Select the **Company Preferences** tab.
d) Set the "**Do you Track Time?**" option to **Yes**.



STEP 3

Before synchronizing tasks entered in DOVICO Timesheet to QuickBooks, an account called **Service** must be created.

a) From QuickBooks, select **Lists**, **Chart of Accounts**.
b) Right click in the **Chart of Accounts** view and select **New**.
c) Select the **Type** of account. With the exception of Accounts Receivables, the account can be set to any type and all other account information is optional.
d) Type **Service** in the **Name** box and click **OK**.



STEP 4

Verify that QuickBooks does not prevent DOVICO Timesheet from modifying the Company file.

a) From QuickBooks, select **Edit**, **Preferences** from the menu.
b) Select **Integrated Applications** on the left.
c) Select the **Company Preferences** tab on the right.
d) Verify that the "Don't allow any applications to access this company file" option is **un-checked**.

Those are the steps required to configure QuickBooks to link with DOVICO Timesheet.

Data Mapping (QuickBooks)

The following tables show the relationships between different fields in DOVICO Timesheet and QuickBooks.

DOVICO Timesheet - Employees	QuickBooks - Employee
First Name	First Name
Last Name	Last Name
Start Date	Hired

DOVICO Timesheet - Clients	QuickBooks - Customer
Name	Customer
Contact	Contact

DOVICO Timesheet - Projects	QuickBooks - Job
Name	Full Name
Client	Customer
Description	Job Description

DOVICO Timesheet - Tasks	QuickBooks - Service Item
Name	Item Name / Number
Description	Description

DOVICO Timesheet - Timesheet	QuickBooks - Timesheet
Date	Date
Employee Name	Employee Name
Client Name	Customer: Job
Task	Service Item
Duration	Duration
Billable	Billable
Time Entry description	Notes

Using the QuickBooks Link

The QuickBooks Link synchronization process is bi-directional (i.e. two-way communication) between DOVICO Timesheet and QuickBooks.

Sending information from one application to another is as easy as selecting the information to send and clicking the synchronize button on the toolbar.

Prerequisite:

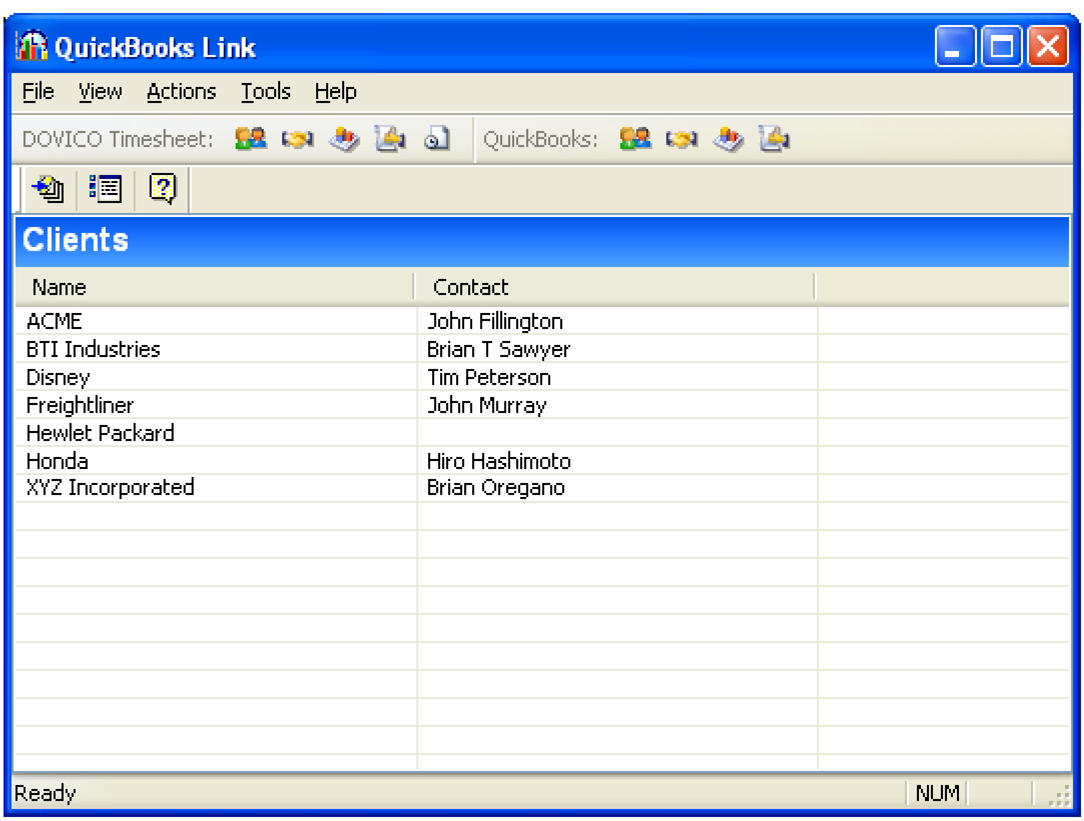
- Before starting to synchronize information, all instructions in the QuickBooks Setup section (page 202) must have been performed or verified.

> **Note:** When synchronizing an item for the first time, QuickBooks may warn you that an application is attempting to read/modify the Company file. Accept one of the available options.

Before time can be sent from DOVICO Timesheet to QuickBooks, the following steps must be followed, **in order**.

1. Synchronize **Employees** (page 206)
2. Synchronize **Clients/Customers** (page 207)
3. Synchronize **Projects/Jobs** (page 208)
4. Synchronize **Tasks/Service Items** (page 209)

Once these steps have been completed, you can synchronize **time entries** (page 210)



Synchronizing Employees

Use the QuickBooks Link to synchronize employees whose time entries will be sent from DOVICO Timesheet to QuickBooks. When synchronizing for the first time, employees existing in QuickBooks can be sent to DOVICO Timesheet and vice versa. Once successfully completed, there is no need to synchronize employees again until employees are added.

> **Note**: If you have not synchronized your employees before and an employee with the same name exists in both DOVICO Timesheet and QuickBooks, then one of these must be renamed or deleted.

To synchronize Employees from DOVICO Timesheet to QuickBooks:

1. Start **QuickBooks**.
2. Start **DOVICO Timesheet**.
3. From DOVICO Timesheet, select **QuickBooks** from the Integration section of the side navigation bar and click the link labeled "**Click on this link to run the QuickBooks link.**".
4. Select **Run/Open**, or save and open the file (TimesheetApplicationLauncher.exe).
5. From QuickBooks Link, select **View**, **DOVICO Timesheet**, **Employees** from the menu or click the employee icon in the DOVICO Timesheet section of the toolbar.

6. Select the employees to synchronize from the list. **Hint**: hold down the ctrl or shift keys to select multiple items or select Action, Select All from the toolbar to select all records.
7. Select **Actions**, **Synchronize Records** or click the Synchronize button on the toolbar.
8. For each employee synchronized, you must modify that employee's **Payroll and Compensation information** in QuickBooks.

   From QuickBooks:

   a. Select **Employees**, **Employee Center** to view the list of employees.
   b. Select the Employee tab and double click on the employee name.
   c. Select **Payroll and Compensation Info** from the Change tabs drop-down list.
   d. Locate the "**Use time data to create paychecks**" option. This option cannot be used when synchronizing employees.
      i. If the box is already unchecked, **check** and **uncheck** this box to bypass a known flaw with this option.
      ii. If the box is checked, uncheck the box.
   e. Click **OK**.
   f. Repeat steps a – e for each employee.

To synchronize Employees from QuickBooks to DOVICO Timesheet:

1. From QuickBooks Link, select **View**, **QuickBooks**, **Employees** from the menu or click the employee icon in the QuickBooks section of the toolbar.

2. Select the employees to synchronize from the list.
3. Select **Actions**, **Synchronize Records** or click the Synchronize button on the toolbar.
4. For each employee synchronized, you must modify that employee's **Payroll and Compensation information** in QuickBooks as detailed in step 8 above.

Synchronizing Clients/Customers

Use the QuickBooks Link to synchronize clients against which time will be tracked.

When synchronizing for the first time, customers existing in QuickBooks can be sent to DOVICO Timesheet and vice versa. Once successfully completed, there is no need to synchronize clients/customers again until one is added.

> **Note**: If you have not synchronized your clients/customers before and one of these exists with the same name in both DOVICO Timesheet or QuickBooks, then one must be renamed or deleted.

To synchronize Clients from DOVICO Timesheet to QuickBooks:

1. Start **QuickBooks**.
2. Start **DOVICO Timesheet**.
3. Launch the **QuickBooks Link** from the Integration section of the side navigation bar.
4. From QuickBooks Link, select **View**, **DOVICO Timesheet**, **Clients** from the menu or click the client icon in the DOVICO Timesheet section of the toolbar.

5. Select the clients to synchronize from the list. **Hint**: hold down the ctrl or shift keys to select multiple items or select Action, Select All from the toolbar to select all records.
6. Select **Actions**, **Synchronize Records** or click the Synchronize button on the toolbar.

To synchronize Customers from QuickBooks to DOVICO Timesheet:

1. From QuickBooks Link, select **View**, **QuickBooks**, **Customers** from the menu or click the customer icon in the QuickBooks section of the toolbar.

2. Select the customers to synchronize from the list.
3. Select **Actions**, **Synchronize Records** or click the Synchronize button on the toolbar.

Synchronizing Projects/Jobs

Use the QuickBooks Link to synchronize projects against which time will be tracked. When synchronizing for the first time, jobs existing in QuickBooks can be sent to DOVICO Timesheet and vice versa. Once successfully completed, there is no need to synchronize projects/jobs again until one is added.

Notes:

- Only the projects/jobs associated with clients/customers are available for synchronization. If no projects are listed, you will have to synchronize your clients before any projects will be displayed.
- Projects linked to Microsoft Project/Project Server are not displayed.
- Project/jobs with the same name can be synchronized. However, if the combination of client/customer + project/job name exists in both applications before synchronization then one must be renamed or deleted.

To synchronize Projects from DOVICO Timesheet to QuickBooks:

1. Start **QuickBooks**.
2. Start **DOVICO Timesheet**.
3. Launch the **QuickBooks Link** from the Integration section of the side navigation bar.
4. From QuickBooks Link, select **View**, **DOVICO Timesheet**, **Projects** from the menu or click the project icon in the DOVICO Timesheet section of the toolbar.

   NOTE: Only the projects associated with synchronized clients are displayed. Projects linked to Microsoft Project/Project Server are not displayed.

5. Select the projects to synchronize from the list. **Hint**: hold down the ctrl or shift keys to select multiple items or select Action, Select All from the toolbar to select all records.
6. Select **Actions**, **Synchronize Records** or click the Synchronize button  on the toolbar.

To synchronize Jobs from QuickBooks to DOVICO Timesheet:

1. From QuickBooks Link, select **View**, **QuickBooks**, **Jobs** from the menu or click the job icon in the QuickBooks section of the toolbar.

2. Select the jobs to synchronize from the list. **Hint**: hold down the ctrl or shift keys to select multiple items or select Action, Select All from the toolbar to select all records.
3. Select **Actions**, **Synchronize Records** or click the Synchronize button  on the toolbar.

Synchronizing Tasks/Service Items

Use the QuickBooks Link to synchronize Tasks/Service Items against which time will be tracked. When synchronizing for the first time, Service items existing in QuickBooks can be sent to DOVICO Timesheet and vice versa. Once successfully completed, there is no need to synchronize tasks/service items again until one is added.

Notes:

- Tasks in DOVICO Timesheet that are linked to Microsoft Project will not be displayed.
- Before Tasks can be successfully sent to QuickBooks, an account named **Service** must be created in QuickBooks. See page 203.
- If you have not synchronized your tasks/service items before and one of these exists with the same name in both DOVICO Timesheet or QuickBooks, then one must be renamed or deleted.

To synchronize Tasks from DOVICO Timesheet to QuickBooks:

1. Start **QuickBooks**.
2. Start **DOVICO Timesheet**.
3. Launch the **QuickBooks Link** from the Integration section of the side navigation bar.
4. From QuickBooks Link, select **View**, **DOVICO Timesheet**, **Tasks** from the menu or click the task icon in the DOVICO Timesheet section of the toolbar.

5. Select the tasks to synchronize from the list. **Hint**: hold down the ctrl or shift keys to select multiple items or select Action, Select All from the toolbar to select all records.
6. Select **Actions**, **Synchronize Records** or click the Synchronize button on the toolbar.

To synchronize Service Items from QuickBooks to DOVICO Timesheet:

1. From QuickBooks Link, select **View**, **QuickBooks**, **Service Items** from the menu or click the service item icon in the QuickBooks section of the toolbar.

2. Select the service items to synchronize from the list. **Hint**: hold down the ctrl or shift keys to select multiple items or select Action, Select All from the toolbar to select all records.
3. Select **Actions**, **Synchronize Records** or click the Synchronize button on the toolbar.

Sending Time Entries to QuickBooks

Use the QuickBooks Link to synchronize time entries entered using DOVICO Timesheet to QuickBooks.

Note: Once a time entry has been sent from DOVICO Timesheet to QuickBooks it cannot be sent again. If you wish to edit a time entry after it has been sent to QuickBooks, you will have to manually edit the time entry within QuickBooks.

To send time entries to QuickBooks:

1. Start **QuickBooks**.
2. Start **DOVICO Timesheet**.
3. Launch the **QuickBooks Link** from the Integration section of the side navigation bar.
4. Select **View**, **DOVICO Timesheet**, **Timesheets** from the menu or select the Timesheets icon in the DOVICO Timesheet section of the toolbar.

5. Select **From** and **To** dates for the Timesheet and click **Apply**.

   NOTE: Only approved time entries associated with synchronized employees, tasks, projects and clients are displayed.

6. Select the time entries that you wish to synchronize. **Hint**: hold down the ctrl or shift keys to select multiple items.
7. Select **Actions**, **Synchronize Records** (or click the Synchronize button  on the toolbar).

Options in the QuickBooks Link

This option in the QuickBooks link enables you to specify what to do when duplicate records are found when synchronizing.

Available options are:

- **Replace duplicate records** every time you synchronize, if a duplicate record is found, it will automatically update the existing record.
- **Skip duplicate records** every time you synchronize, if a duplicate record is found, it will go to the next record and not update the duplicate record.
- **Prompt when duplicate records found** every time you synchronize, if a duplicate record is found, you will be prompted to add or replace the duplicate record on an individual basis.

Active Directory

DOVICO Timesheet's integrated link to Microsoft's® **Active Directory service** allows employees to be imported from Active Directory and also authenticates DOVICO Timesheet logon user IDs and passwords against Active Directory.

> **Note**: If a company enables Active Directory integration with DOVICO Timesheet, it is highly recommended that DOVICO Timesheet be secured (the IIS virtual directory) by using SSL or another security mechanism.

Instructions when using the Microsoft Project Link
Please follow the alternate instructions on page 214 if you are planning to link employees to both Active Directory and Microsoft Project/Project Server.

Alternate instructions when using the QuickBooks Link
Please follow the alternate instructions on page 216 if employees have already been synchronized with QuickBooks.

The **Active Directory** link is located in the Integration section of the side navigation bar.

To synchronize employees with Active Directory:

Prerequisite:

- Employees entered in Active Directory must include a First and Last name.

STEP 1: Establish connection information

1. Open the **connection information** area of the screen by clicking the "+" graphic.
2. Enter the Active Directory server **name**.
3. Enter the **port number** for the Active Directory server.
4. Enter the **Windows User ID** and **Password** for a user having Read access to Active Directory.

   The **Advanced** button should only be used by experienced Active Directory administrators to customize the employees returned from the Active Directory query. The "Secure authentication" option should be left on at all times except in testing scenarios.
5. Click the **Connect** button.

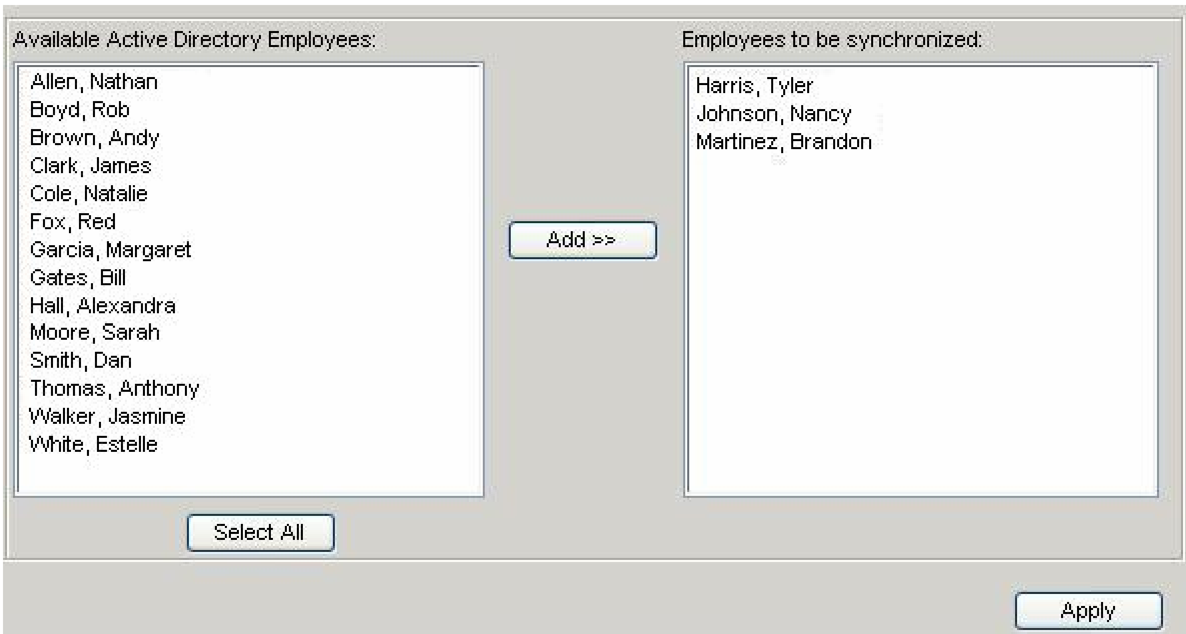
STEP 2 (Optional): Schedule updates

1. Schedule daily updates by checking the **update** checkbox and entering the scheduled update time (in HH:MM).

> **Tips**:
>
> - Daily updates should be scheduled during **non-peak** times.
> - If daily updates are not required, a manual update for all employees shown in the 'Employees to be synchronized' list box can be accomplished by clicking the **Apply** button.
> - DOVICO Timesheet's Job Scheduler service must be running for scheduled updates to occur.

STEP 3: Synchronize employees

Once the connection to the Active Directory server is established, all Active Directory employees that have not been synchronized to DOVICO Timesheet are listed in the left column (**Available Active Directory Employees**) and all employees currently synchronized to DOVICO Timesheet are listed in the right column (**Employees to be synchronized**).

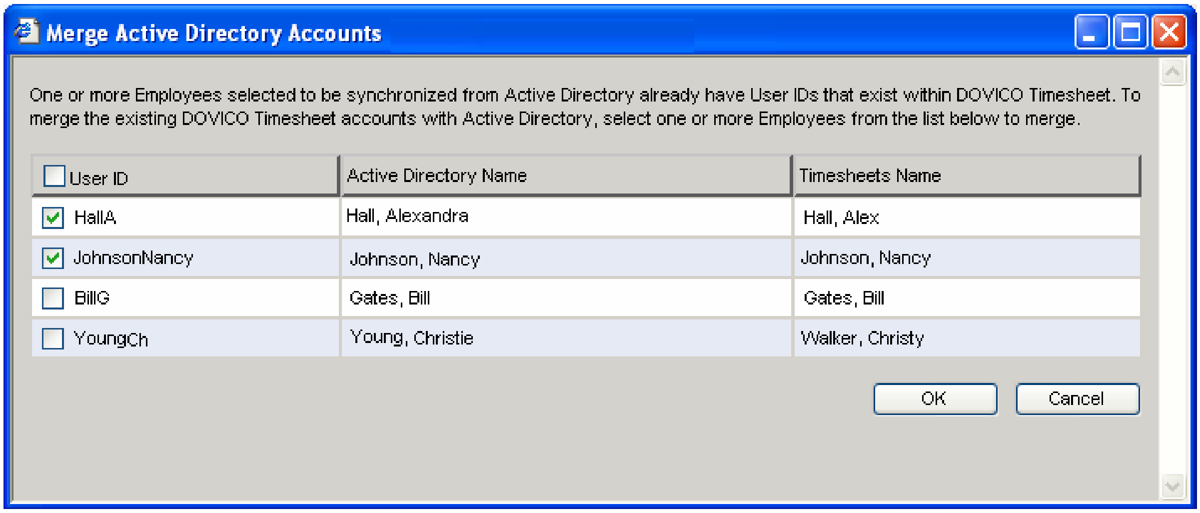


1. Select one or more **employees** from the left column.
2. Click the **Add>>** button to move them to the list of employees to be synchronized.
3. Click **Apply**.

   In the case where employees already exist in the DOVICO Timesheet database (i.e. have identical User IDs), a new window opens offering the option to merge the conflicting employee account information in the DOVICO Timesheet database. When merged, an employee's first name, last name, user ID, password and e-mail address established in DOVICO Timesheet are overwritten with the information from Active Directory.

   a. Check each **employee** to overwrite.

   b. Click **OK**.



4. For each newly imported employee, the **employee properties** (security level, software access, rates, etc.) should be reviewed and adjusted as required.

Notes:

- When synchronized, the employee's First Name, Last Name, User ID and e-mail address displayed in the Employees view cannot be edited. Any changes to these fields can only be accomplished using Active Directory. The employee's Password is not stored in the DOVICO Timesheet database and the password cannot be modified using any DOVICO Timesheet component.
- When any employee User ID is modified using Active Directory, that employee will have to be re-synchronized before that user can log into DOVICO Timesheet.
- The First Name, Last Name, User ID and e-mail address fields in DOVICO Timesheet have limits on the maximum number of characters. Data imported from Active Directory which exceeds these limits will be truncated. First Name (100 characters), Last name (100), User ID (100) and e-mail address (250).
- Once the connection information is established, an attempt to connect to the Active Directory Server is made every time the Active Directory view is accessed.

Active Directory and Microsoft Project

The following topic details how to link employees to both **Active Directory** and a **Microsoft Project/Project Server** resource pool. Use the standard Active Directory instructions on page 211 to link those employees who are not part of a Microsoft Project resource pool.

Prerequisites

- The employees must already exist in a Microsoft Project/Project Server resource pool.
- The Microsoft Project/Project Server resource pool must already be synchronized with DOVICO Timesheet.
- Employees entered in Active Directory must include a First and Last name.

Notes:

- Once the steps which follow are completed, Active Directory is the controlling authority for employee User ID, First Name, Last Name and e-mail address. Any changes to these fields can only be accomplished using Active Directory.
- If an employee name is changed in Active Directory, the employee name in the Resource pool will be updated but the employee name in individual Microsoft Project/Project Server project files are not automatically updated. DOVICO Timesheet will attempt to update the employee name changes in individual project files when each is accessed via the Microsoft Project Link.

Summary

The following steps involve modifying employee User IDs existing in DOVICO Timesheet to exactly match those entered in Active Directory, synchronizing employees with Active Directory and then merging the conflicting employee IDs.

To modify Employee User IDs:

From Active Directory:

1. Document the name and User IDs of all employees linked to the Microsoft Project resource pool.

From DOVICO Timesheet:

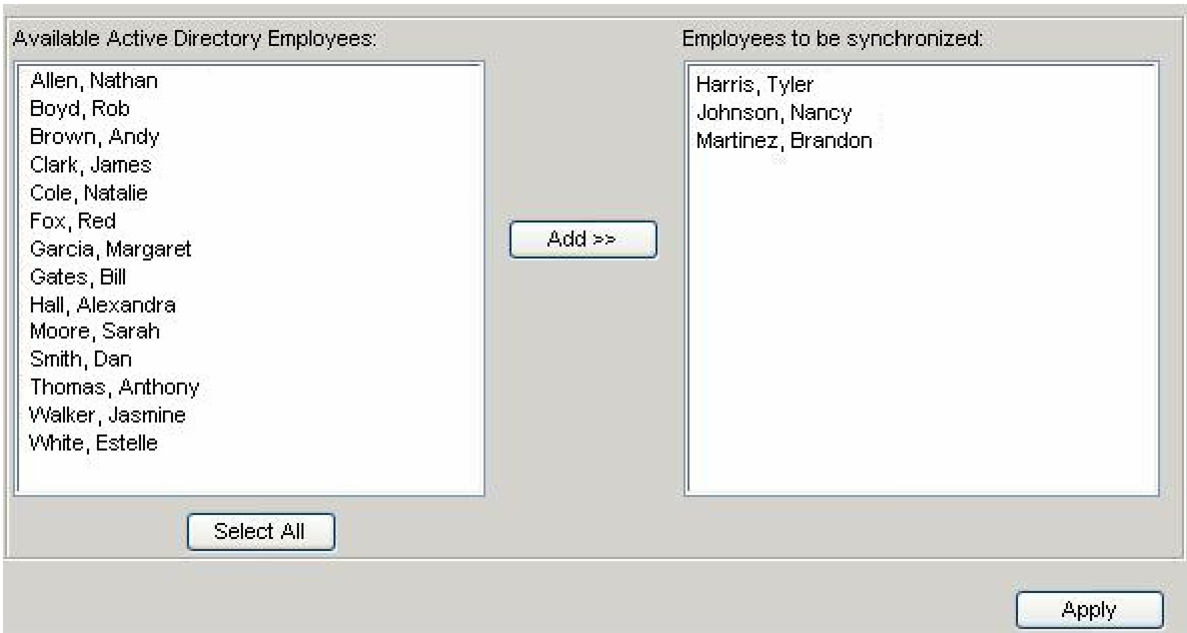
2. Click the **Items List** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
3. Select **Employees** in the drop-down list at the upper left corner of the view.
4. Select an employee who is linked to Microsoft Project.
5. Click the **Properties** icon on the toolbar or **double click** on the employee name to display the Properties window.
6. Edit the employee's **User ID** field so that it exactly matches the User ID found in Active Directory.
7. Click **Done** or use the **Next Record** button (or Previous) to browse to other employees. Clicking the Next (or Previous) button automatically saves any changes made.
8. Edit other Employee User IDs as required.

To synchronize employees with Active Directory:

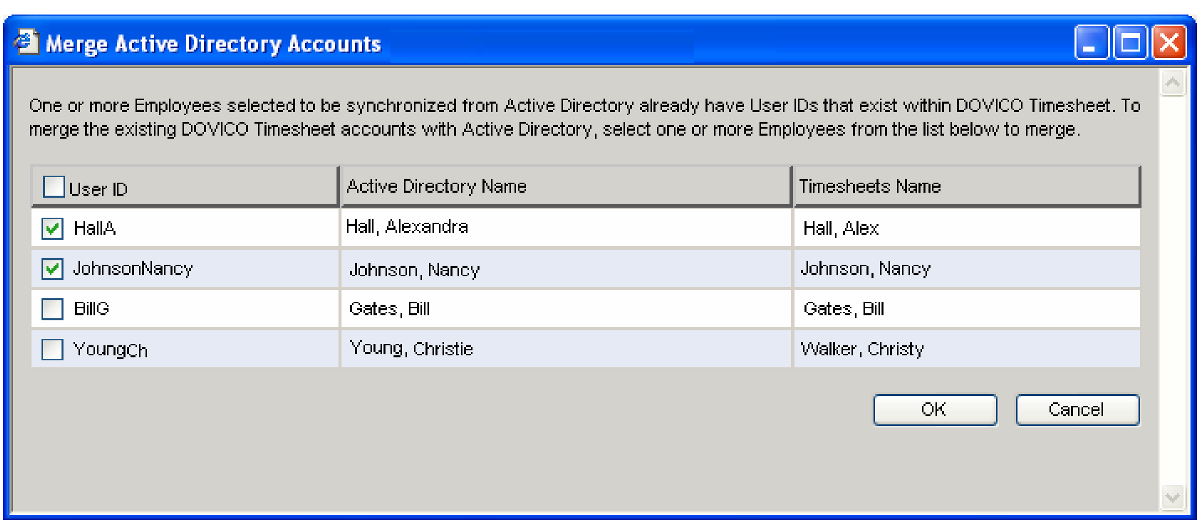
The **Active Directory** link is located in the Integration section of the side navigation bar.

The following assumes that Active Directory Connection Information has been established and the connection verified. (page 211)

All Active Directory employees that have not been synchronized to DOVICO Timesheet are listed in the left column (**Available Active Directory Employees**) and all employees currently synchronized to DOVICO Timesheet are listed in the right column (**Employees to be synchronized**).



1. Select one or more **employees** from the left column.
2. Click the **Add>>** button to move them to the list of employees to be synchronized.
3. Click **Apply**.
4. A new window (Merge Active Directory Accounts) is displayed offering the option to merge the conflicting employee account information in the DOVICO Timesheet database.
   a. Check each **employee** to overwrite.
   b. Click **OK**.



Active Directory and QuickBooks

The following details how to link employees to both **Active Directory** and **QuickBooks** when the employees already exist in QuickBooks. If employees do not currently exist in QuickBooks, use the standard Active Directory instructions on page 211 and synchronize employees to QuickBooks at a later date.

Prerequisites:

- The employees must already have been synchronized between QuickBooks and DOVICO Timesheet.
- Employees entered in Active Directory must include a First and Last name.

Note: Once the steps which follow are completed, Active Directory is the controlling authority for employee User ID, First Name, Last Name and e-mail address. Any changes to these fields can only be accomplished using Active Directory.

Summary

The following steps involve modifying employee User IDs existing in DOVICO Timesheet to exactly match those entered in Active Directory, synchronizing employees with Active Directory and then merging the conflicting employee IDs.

To modify Employee User IDs:

From Active Directory:

1. Document the name and User IDs of all employees linked to the Microsoft Project resource pool.

From DOVICO Timesheet:

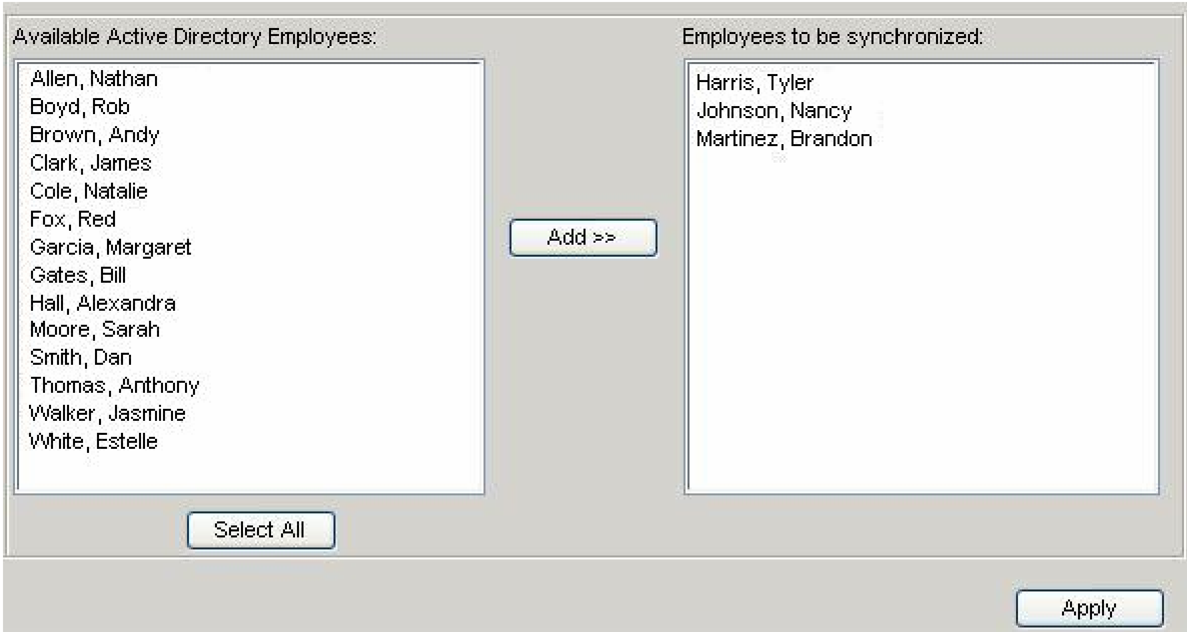
2. Click the **Items List** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
3. Select **Employee** in the drop-down list at the upper left corner of the view.
4. Select an employee who is synchronized with QuickBooks.
5. Click the **Properties** icon on the toolbar or **double click** on the employee name to display the Properties window.
6. Edit the employee's **User ID** field so that it exactly matches the User ID found in Active Directory.
7. Click **Done** or use the **Next Record** button (or Previous) to browse to other employees. Clicking the Next (or Previous) button automatically saves any changes made.
8. Edit other Employee User IDs as required.

To synchronize employees with Active Directory:

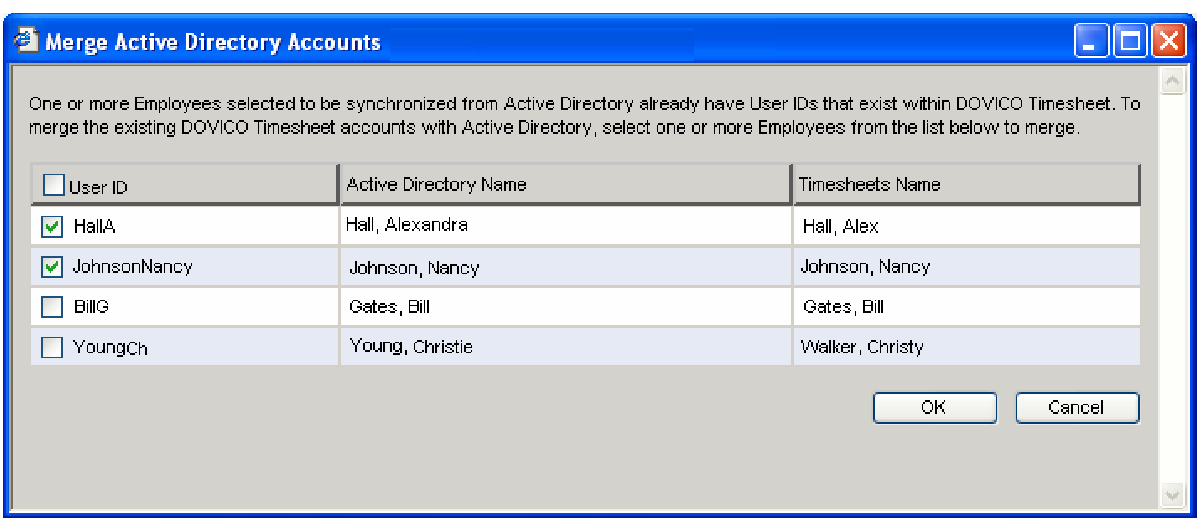
The **Active Directory** link is located in the Integration section of the side navigation bar.

The following assumes that Active Directory Connection Information has been established and the connection verified. (page 211)

All Active Directory employees that have not been synchronized to DOVICO Timesheet are listed in the left column (**Available Active Directory Employees**) and all employees currently synchronized to DOVICO Timesheet are listed in the right column (**Employees to be synchronized**).



1. Select one or more **employees** from the left column.
2. Click the **Add>>** button to move them to the list of employees to be synchronized.
3. Click **Apply**.
4. A new window (Merge Active Directory Accounts) is displayed offering the option to merge the conflicting employee account information in the DOVICO Timesheet database.
   a. Check ☑ each **employee** to overwrite.
   b. Click **OK**.



Import/Export

Use the **Import/Export tool** to communicate information between DOVICO Timesheet and other applications in various formats (text, comma separated, html, xml, etc).

Every time the Import/Export tool is launched, a program file is downloaded from the computer or server where DOVICO Timesheet is installed.

Some of the many useful functions for which the Import/Export tool can be used include:

- **Import** employees, projects, tasks, time entries, expense entries and other information from other applications to DOVICO Timesheet.
- **Export** employees, projects, tasks, time entries, expense entries and other information from DOVICO Timesheet to other applications.
- Create and save Import templates to be used anytime.
- Create and save Export templates to be used anytime.

Import/Export System Requirements:

- The operating system used must be Windows 98 or higher.
- Microsoft .NET Framework version 2.0 must be installed on the operating system in use.
- A direct connection to the SQL database where DOVICO Timesheet resides (this requires a LAN/Intranet setup or a VPN).

To launch Import/Export Integration:

1. From DOVICO Timesheet, click the **Import/Export** button  located in the Integration section of the side navigation bar.
2. Select the **Import/Export tab** and click the link labeled "**Click on this link to run the Import/Export tool.**"
3. Select **Run/Open**, or save and open the file (TimesheetApplicationLauncher.exe).

Notes:

- If the 'TimesheetApplicationLauncher.exe' file is saved (in step 3 above), it should be deleted after using the Import/Export tool.
- The Import/Export Link cannot be used with DOVICO Timesheet's Hosted Online solution.

Tips:

- Use the Import Recovery option to view or undo imports.
- For import and export templates or for code to create links to other software, please visit our web site at http://www.dovico.com/developer.html

Importing data

The following describes how to use the Import/Export tool to import information from another application/file to DOVICO Timesheet.

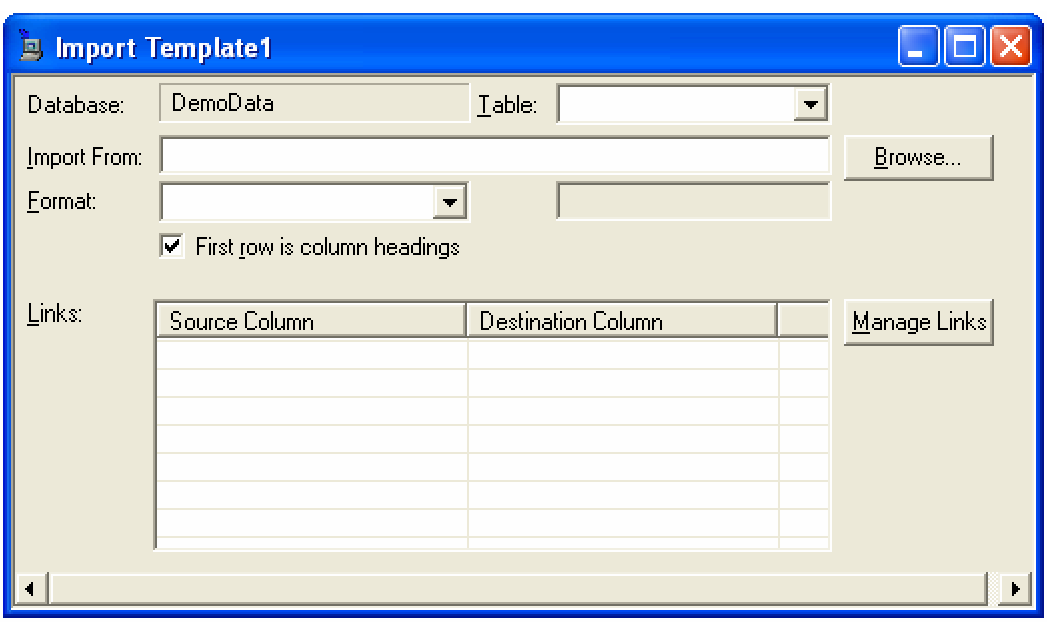
Because the Import/Export tool brings data into the DOVICO Timesheet database, it should only be used by those individuals experienced in database structures.

Prerequisites:

- Before importing data into DOVICO Timesheet, a data file must be created and properly formatted (required fields, default values, etc). Import Table Fields details are located on page 223.
- Before importing records, any items referenced in the record must already exist in the database. Example: if you are importing time records then the projects, tasks, employees referenced in the time records must exist in the database.

To import data into DOVICO Timesheet:

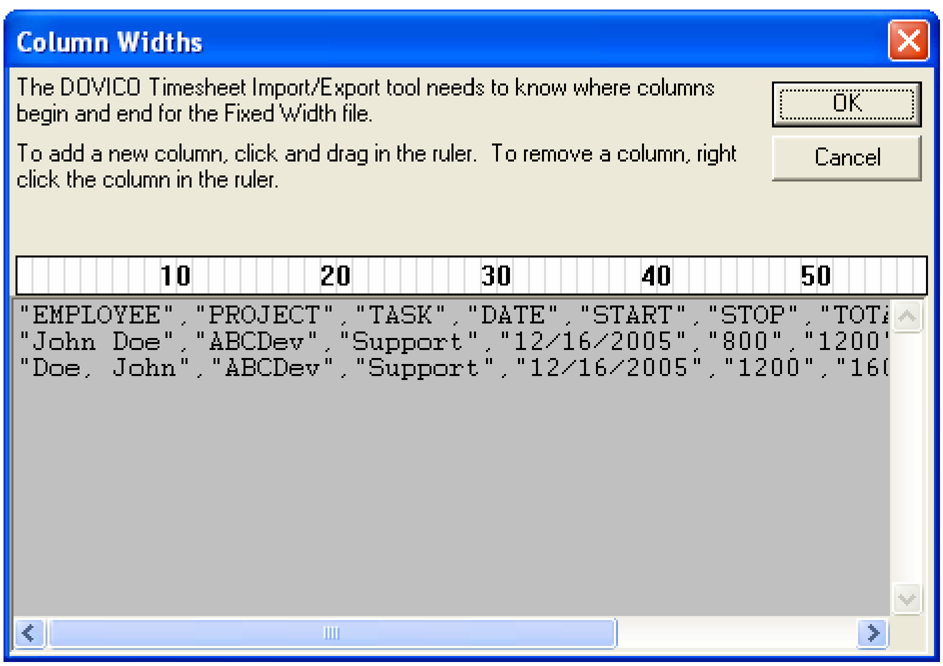
1. From DOVICO Timesheet, select **Import/Export** from the Integration section of the side navigation bar, select the **Import/Export tab** and click the link labeled "**Click on this link to run the Import/Export tool.**"
2. Select **Run/Open**, or save and open the file (TimesheetApplicationLauncher.exe).
3. From the Import/Export tool, select **File**, **New Template** from the menu (or click the **New** button on the toolbar).
4. Select **Import Template** and click **OK**.



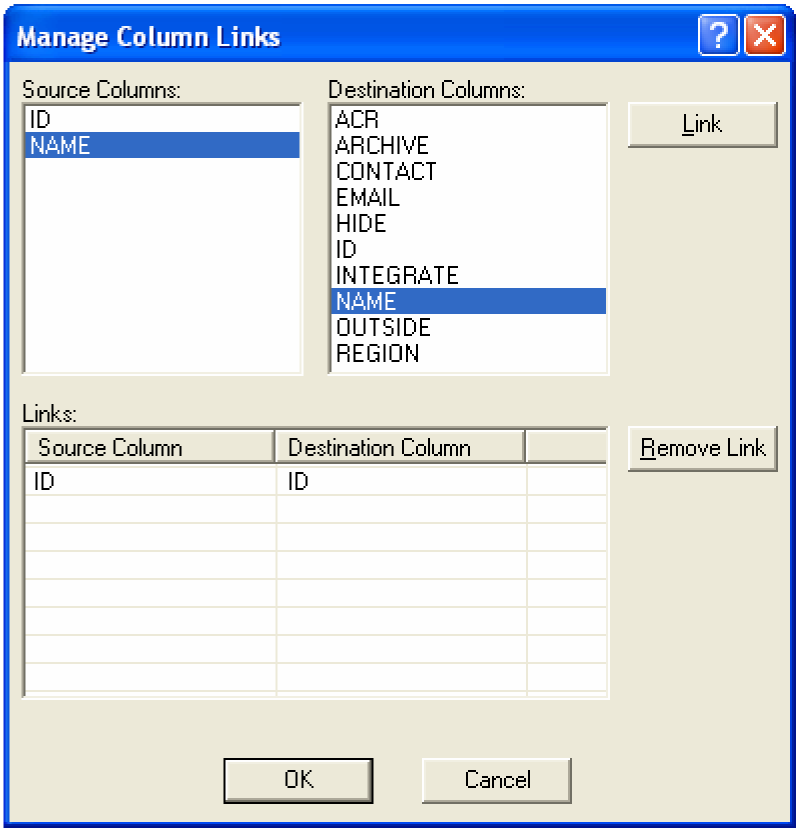
5. Select the DOVICO Timesheet **Table** where information will be imported. The following tables are available for importing:
   - ACTEXP: To import expenses
   - CLIENT: To import clients
   - EMPLOYEE: To import employees
   - PROJECT: To import projects

- RATE: To import rates
- REGION: To import regions
- TASK: To import tasks
- TRANS: To import time entries

6. Click the **Browse** button to locate the file to be imported. Select the file and click Open. This file should contain the properly formatted data to be imported into DOVICO Timesheet.
7. Select the **format** to be used from the drop-down list. If the format type requires additional information, enter the information in the box to the right. For example, if you select the CSV format, you will need to enter the type of character used to separate each value. If you select XML, each record needs a generic name, which the XML parser can recognize. If you cannot remember the format used in the source file, select **Actions**, **Preview Source Data** from the menu to display the file content. If the box is grayed out, DOVICO Timesheet will generate default information and no additional information is required.
8. If the first row has column headings, check the **First row is column headings** checkbox. Please note that this option may be grayed out for some formats (i.e. XML).
9. Click the **Manage Links** button.
10. If the format type for your source file is **Fixed Width**, a Column Widths box is displayed. To add a column, click and drag the ruler. To remove a column, right-click the column in the ruler. Click **OK** when done.



11. The **Manage Column Links** box will be displayed, which is used to map source columns to columns in the destination table. For example, if you had a column in the source file called ClientName, you could map it to the NAME column of the CLIENT table. To map columns, click one item in the **Source Columns** table and one item in the **Destination Columns** table then click the **Link** button. This will add a link entry in the **Links Table** below.



To remove a link, select it from the list and click the Remove Link button.

12. Once you are satisfied that all links are set correctly, click **OK** and the links will be displayed in the import template.
13. (**Optional**) Select **File**, **Description** in the menu to add a description for this import template.
14. To save the template, click the **Save** button  or select **Save** or **Save as** from the **File** menu.
15. To import information to DOVICO Timesheet, select **Actions**, **Import** from the menu.

    Once the template is saved, you can import the information anytime. Simply open the template (select **File**, **Open Template**) and import.
    Use Import Recovery (from DOVICO Timesheet) to undo import operations.

16. If you are importing data to the TRANS table or to the ACTEXP table, a pop-up box will be displayed asking how to map certain IDs.
    - Use **Unique** names: This option performs matches using the object names. In order for this option to work, all names must be unique.
    - Use **Outside** field: This option uses the table's OUTSIDE field to match the IDs of the items being imported.

Tip: For details concerning the database tables (database schema), visit the developers section of our website at http://www.dovico.com/developer.html.

Exporting data

The following describes how to use the Import/Export tool to export data from DOVICO Timesheet.

To export data from DOVICO Timesheet:

1. Start **DOVICO Timesheet**.
2. Select **Import/Export** from the Integration section of the side navigation bar, select the **Import/Export tab** and click the link labeled "**Click on this link to run the Import/Export tool.**"
3. Select **Run/Open**, or save and open the file (TimesheetApplicationLauncher.exe).
4. From the Import/Export tool, select **File**, **New Template** from the menu (or click the **New** button on the toolbar).
5. Select **Export Template** and click **OK**.
6. Select the **Format** (i.e. Character separated, Fixed Width, HTML, XML) to be used from the drop-down list.
7. If the format type requires additional information, enter the information in the box to the right. For example, if you select the character separated format, you will need to enter the type of character used to separate each value. If you select XML, each record needs a generic name, which the XML parser can recognize. If the box is grayed out, no additional information is required.
8. Enter the location and name of the export file. When you export the information, the data will be saved in this file. You can use the Browse button to select the location where it should be saved.
9. Check the **Include column names in export** if you want DOVICO Timesheet to export and save column names in the export file. This option may not apply to some formats.
10. Select tables or specific items from the **Database view** tab to be exported. **Right click** any table item to: Expand All Tables, Collapse All Tables, or view Properties to apply specific filters or formulas (Properties).

Notes:

- For details concerning the database tables (database schema), visit the developers section of our website at http://www.dovico.com/developer.html.
- User ID and Password encryption does not permit employee user IDs and passwords to be exported.

11. For advanced functions, you can use the **Custom SQL view tab** to create custom SQL statements to execute against the database. If you've selected items in the Database view, they will be copied to the SQL view for customization.

    NOTE: You should decide which tab you want to use before creating your template. When switching from the Custom SQL view to the Database view, you will lose information entered in the Custom SQL view.
12. If you will be using this template again, click the **Save** button (or select **Save** or **Save as** from the **File** menu).
13. To export, select **Actions**, **Export** from the menu.
14. (**Optional**) Select **File**, **Description** if you wish to add a description for the export file.

Once the template is saved, you can export the information anytime. Simply open the template (select **File**, **Open Template**) and **Actions**, **Export**.

Export properties

For any export template file, select any item in the Database view tab, right click and select Properties to:

- **Enter a Filter or Formula** – The filter field is used to limit what records are exported from the database. An example filter would be ">=100", or for a string-type column ">='Mary'" or "='Mary'". The filter option is recommended for advanced users only. The formula option is not available for all field types. It is used to take the value of each column in a row, and translate it to a new value applied by the formula. For example if the value was 1, and the formula was "*100" then the new value would be 100. You can enter fairly advanced formulas if you are familiar with SQL (since this is all translated to SQL when the export takes place).
- **Field Database Properties** – Shows specific information about the selected item.

Import Recovery

Import Recovery is used to list all importing jobs that have been performed using DOVICO Timesheet's Import tool. You can choose to undo any one of the listed imports. If you undo an import, the imported records will be deleted from the DOVICO Timesheet database.

To remove records imported to DOVICO Timesheet:

1. Select **Import/Export** from the Integration section of the side navigation bar.
2. Select the **Import Recovery** tab.
3. Select the **import action** to undo from the list.
4. Click **Undo**.

Import Table Field Details

The following pages detail the import data fields for each table available in the Import tool. Note that for each table, only a few of the available fields are required.

Prerequisite:

- Before importing data into DOVICO Timesheet, a data file must be created and properly formatted (required fields, default values, etc). Sample import .csv and .txt files are available directly from the DOVICO Timesheet's help files. Launch the help system by clicking on the toolbar's Help button and then search for "Import data table details" in Index tab.

Tip on importing data using .txt files

- At the end of the last line in an import **.txt file**, press the Enter key to insert a hard return. The last record may not be imported if there is no hard return at the end of the last line.

PROJECT table

- This table is used to store the project information for the DOVICO Timesheet database.

**** Required Fields**

Name	Description	Notes	Default Value
ID	The unique ID for a project	**Field not available for linking**	
CLIENT	The client ID for the client assigned to the project	The client ID must already exist in DOVICO Timesheet.	"0"
****NAME**	The name of the project	Alphanumeric field. Up to 250 characters	
LEADER	The employee ID for the manager of the project	The employee ID must already exist in DOVICO Timesheet	"0"
DESC	The description for the project	Alphanumeric field. Up to 250 characters	Blank
STATUS	The status of the project	"A" for active, "E" for Estimate. "F" for Finished, "Q" for Quotation, "R" for Rejected and "T" for Terminated.	"E"
GROUP	The group ID for the project group assigned to the project	This project group ID must already exist in DOVICO Timesheet.	"0"
START	The start date for the project	Must be in Short Date Format as specified in your regional settings.	"1/1/1970"
END	The end date for the project	Must be in Short Date Format as specified in your regional settings.	"1/1/1970"
BILL	The 'Billing by' selection for the project.	"A" for Active. "E" for Estimated Hours, "F" for Fixed Cost.	"E"
COST	The fixed cost for a project if the BILL field is set to "F"	Numeric field only. No currency symbols permitted	"0"
ACTASSONLY	Show only Active Assignments	"T" is employees only see their active assignments, "F" otherwise	"F"
RESENTRY	Prevent Entries outside view date range	"T" is employees only see their active assignments, "F" otherwise	"F"
TRABILLABLE	Time entries billable by default	"T" to set this project's time entries as default billable, "F" otherwise.	Based on the TRABILLABLE field in the PREFS table
EXPBILLABLE	Expense entries billable by default	"T" to set this project's expense entries as default billable, "F" otherwise.	Based on the EXPBILLABLE field in the PREFS table
TARGET	Reserved for future use	Reserved for future use	"0"
LINK	Link to Microsoft Project	**Field not available for linking** "T" if the project is linked, "F" otherwise.	"F"
MSPCONFIG	Link path to Microsoft Project	**Field not available for linking** If linked, this field contains the path to the MS Project file.	Blank
ARCHIVE	Set project to Archive	"T" if the project is flagged for archive, "F" otherwise.	"F"
HIDE		"T" if the item is to be hidden in report parameter lists, "F" otherwise.	"F"
INTEGRATE	QuickBooks link information	**Field not available for linking** This field contains Quick Books link information, which is used internally by the software.	Blank

EMPLOYEE table

This table stores employee information for the DOVICO Timesheet database.

**** Required Fields**

Name	Description	Notes	Default Value
ID	The unique ID for the employee	**Field not available for linking**	
TRAWORKFLOW	The Timesheet Workflow ID assigned to the employee	The timesheet workflow ID must already exist in DOVICO Timesheet.	"0"
EXPWORKFLOW	The Expense Workflow ID assigned to the employee	The expense sheet workflow ID must already exist in DOVICO Timesheet.	"0"
TIMATT	The Leave/Absence rule ID assigned to the employee	The Leave/Absences rule ID must already exist in DOVICO Timesheet.	"0"
****LAST**	The last name for the employee.	Alphanumeric field. Up to 100 characters	
****FIRST**	The first name for the employee.	Alphanumeric field. Up to 100 characters	
GROUP	The team ID assigned to the employee	The team ID must already exist in DOVICO Timesheet	"0"
SOFTWARE	The software access code	**Field not available for linking** "N" for none, "T" for timesheet tools, "B" for all	"N"
WAGE	The rate ID for the employee's rate of wages	The rate wage ID must already exist in DOVICO Timesheet	"0"
CHARGE	The rate ID for the employee's rate charged	The rate charge ID must already exist in DOVICO Timesheet	"0"
START	The date the employee started	Must be in MM/DD/YYYY format	"1/1/1970"
END	The end date for the employee	Must be in MM/DD/YYYY format	"1/1/2100"
SECURITY	The security ID for the employee	**Field not available for linking**	"95"
****USERID**	The user ID for the employee	Alphanumeric field. Up to 400 characters	
****PASSWORD**	The password for the employee.	Alphanumeric field. Up to 400 characters	
NUMBER	The employee number	Alphanumeric field. Up to 20 characters	Blank
EMAIL	The email address used to send e-mail notifications	Alphanumeric field. Up to 250 characters	Blank
DAYS	The number of days a week the employee works	Numeric field. Up to 15 digits	"0"
HOURS	The number of hours per day the employee works	Numeric field. Up to 15 digits	"0"
NOTTIME	Set to receive notification when time to approve	"T" to set employee to receive notification when time to approve. "F" otherwise	Based on the NOTTIME field in the PREFS table
NOTEXPENSE	Set to receive notification when expenses to approve	"T" to set employee to receive notification when expenses to approve. "F" otherwise	Based on the NOTEXPENSE field in the PREFS table
NOTREJECTED	Set to receive notification when time/expense are rejected	"T" to set employee to receive notification when time/expenses have been rejected. "F" otherwise	Based on the NOTREJECTED field in the PREFS table
ARCHIVE		**Field not available for linking** "T" if employee is flagged for archive. "F" otherwise	"F"
INTEGRATE	This field is used internally by the software	**Field not available for linking**	Blank

TRANS table (Time Entry)

This table is used to store all time entries in the DOVICO Timesheet database

**** Required Fields**

Name	Description	Notes	Default Value
ID	The unique ID for a transaction	**Field not available for linking**	
****PROJECT**	The project name	**Project name and NOT the Project ID**. The project must already exist in DOVICO Timesheet. Alphanumeric field. Up to 250 characters.	
****TASK**	The task name	**Task name and NOT the Task ID**. The task must already exist in DOVICO Timesheet. Alphanumeric field. Up to 250 characters.	
****EMPLOYEE**	The employee full name	This field must contain the employees full name; either first name followed by last name, or last name followed by first name, separated with a comma. If the latter, the last name must be separated by a comma. If you separate the name with a comma, you must contain the entire name in double Quotes. "John Doe" OR "Doe, John"	
GROUP	The team ID assigned to the employee	The team ID must already exist in DOVICO Timesheet	"0"
****DATE**	The date for the transaction	Must be in MM/DD/YYYY format	
****START**	The start time for the transaction	Must be in 24 hour format without colon. For example: "1800"	
****STOP**	The stop time for the transaction	Must be in 24 hour format without colon. For example: "1900"	
****TOTAL**	The total time for the transaction	Must be in hours only (not hours and minutes). That is: 1.5 and not 1:30	
DESC	The description of the transaction	Alphanumeric field. Up to 4000 characters	Blank
BILLABLE	If the time entry is billable	"T" if the transaction is charged to the client, "F" otherwise.	Based on the TRABILLABLE field in the PROJECT table
BILLED	Has the time entry been billed	"T" if the transaction has already been billed, "F" otherwise.	"F"
APPROVED	Has the time entry been approved	"T" if the transaction is approved, "F" otherwise.	"T"
EMPRATE	The charge amount per hour	Numeric field	"0"
EMPCOST	The wage amount per hour	Numeric field	"0"
PRORATE	The prorating for this transaction	Numeric field	"0"
OTCOST	The overtime prorating for the wage	Numeric field	"1"
OTRATE	The overtime prorating for the charge	Numeric field	"1" if BILLABLE = "T"
RATEID	The charge rate ID	Numeric field	"0"
COSTID	The cost rate ID	Numeric field	"0"
OTCOSTID	The overtime rule ID for the wage	Numeric field	"0"
OTRATEID	The overtime rule ID for the charge	Numeric field	"1" if BILLABLE = "F"
ERROR		"T" if the transaction has an error, "F" otherwise	"F"
INTEGRATE	This field contains Quick Books/Microsoft Project link information	**Field not available for linking**	Blank

RATE table

– This table contains wage/charge information for employees in the DOVICO Timesheet database.

**** Required Fields**

Name	Description	Notes	Default Value
ID	The unique ID for a rate	**Field not available for linking**	
****NAME**	The name for the rate	Alphanumeric field. Up to 50 characters	
AMOUNT	The amount of the rate	Numeric field. Up to 15 digits. No currency symbols permitted	"0"
DESC	The description for the rate	Alphanumeric field. Up to 250 characters	Blank
ARCHIVE	Set the task to Archive	"T" if the rate is flagged for archive, "F" otherwise.	"F"
HIDE		"T" if the item is to be hidden in report parameter lists, "F" otherwise.	"F"
INTEGRATE	This field is used internally by the software	**Field not available for linking**	Blank

CLIENT table – This table stores the client information for a DOVICO Timesheet database.

**** Required Fields**

Name	Description	Notes	Default Value
ID	The unique ID for a client	**Field not available for linking**	
REGION	A region ID assigned to the client	This region ID must already exist in DOVICO Timesheet.	"0"
****NAME**	The unique name for a client	Alphanumeric field. Up to 250 characters	
****ACR**	The unique abbreviation for a client	Alphanumeric field. Up to 20 characters	
CONTACT	The contact name for the client	Alphanumeric field. Up to 250 characters	Blank
EMAIL	The client email address used by the Job Scheduler to send automatic reports	Alphanumeric field. Up to 100 characters	Blank
ARCHIVE	Set the task to Archive	"T" if client is flagged for archive, "F" otherwise.	"F"
HIDE		"T" if the item is to be hidden in report parameter lists, "F" otherwise.	"F"
INTEGRATE	This field contains Quick Books link information, which is used internally by the software	**Field not available for linking**	Blank

REGION table

– This table contains region information for the DOVICO Timesheet database.

**** Required Fields**

Name	Description	Notes	Default Value
ID	The unique ID for a region	**Field not available for linking**	
****NAME**	The name of the region	Alphanumeric field. Up to 50 characters	
DESC	A description for the region	Alphanumeric field. Up to 250 characters	Blank
LABOR	The tax on labor	Numeric field. Up to 15 digits	"0"
GOODS	The tax on expenses	Numeric field. Up to 15 digits	"0"
ARCHIVE	Set the task to Archive	"T" if the region is flagged for archive, "F" otherwise.	"F"
HIDE		"T" if the item is to be hidden in report parameter lists, "F" otherwise.	"F"
INTEGRATE	This field is used internally by the software	**Field not available for linking**	Blank

TASK table

This table stores all task information for the DOVICO Timesheet database.

**** Required Fields**

Name	Description	Notes	Default Value
ID	The unique ID for a task	**Field not available for linking**	
GROUP	The group ID for the task group assigned to the task	This task group ID must already exist in DOVICO Timesheet.	"0"
LEADER	The employee ID assigned as manager for the task	This employee ID must already exist in DOVICO Timesheet.	"0"
****NAME**	The name for the task	Alphanumeric field. Up to 250 characters	
DESC	The description for the task	Alphanumeric field. Up to 250 characters	Blank
GLOBAL	If this task is set to Global	"T" if the task is global, "F" otherwise.	"F"
PRORATE	The multiplier for a task. Used in calculating client costs	Numeric field. Up to 15 digits	"1"
TARGET	TARGET – Reserved for future use	**Field not available for linking** TARGET – Reserved for future use.	"0"
ARCHIVE	Set the task to Archive	"T" if the task is to be archived, "F" otherwise.	"F"
HIDE		"T" if the item is to be hidden in report parameter lists, "F" otherwise.	"F"
INTEGRATE	This field contains Quick Books link information, which is used internally by the software.	**Field not available for linking**	Blank

ACTEXP table (Expense Entry)

– The table where Actual Expenses for Projects are stored.

**** Required Fields**

Name	Description	Notes	Default Value
ID	ID	**Field not available for linking**	
****PROJECT**	The project name	**Project name and NOT the Project ID.** The project must already exist in DOVICO Timesheet.	
****EMPLOYEE**	The employee full name	This field must contain the employees full name; either first name followed by last name, or last name followed by first name, separated with a comma. If the latter, the last name must be separated by a comma. If you separate the name with a comma, you must contain the entire name in double Quotes. "John Doe" OR "Doe, John"	
EXPCAT	The expense category ID assigned to the expense	The expense category ID must already exist in DOVICO Timesheet.	"0"
****DATE**	The date of the expense	Must be in MM/DD/YYYY format	
PURORD	The purchase order number for the expense	Alphanumeric field. Up to 50 characters	Blank
INVNUM	The invoice number for the expense	Alphanumeric field. Up to 50 characters	Blank
QUANTITY	The quantity entered for the expense – Applicable to rate based expense categories only	Numeric field. Up to 15 digits	
COSTPERUNIT	The cost per unit entered for the expense category – Applicable to rate based expense categories only	Numeric field. Up to 15 digits. No currency symbols	
AMOUNT	The base amount of the expense	Numeric field. Up to 15 digits. No currency symbols	"0"
MARKUP	The markup percentage on the expense. (This applies to client cost.)	Numeric field. Up to 15 digits. Example: enter "20" for "20%"	"0" if Billable = "T" "-100" if Billable = "F"
FIXED	The fixed amount on the expense. (This applies to client cost.)	Numeric field. Up to 15 digits. No currency symbols	"0"
TAX1	The first Value Added Tax for the expense	Numeric field. Up to 15 digits. No currency symbols	"0"
TAX2	The second Value Added Tax for the expense	Numeric field. Up to 15 digits. No currency symbols	"0"
DESC	The description of the expense	Alphanumeric field. Up to 4000 characters	Blank
REQREI	If a request for reimbursement has been made this expense	"T" for reimbursable, otherwise it is "F".	"F"
BILLABLE		"T" if the transaction is charged to the client, "F" otherwise.	Based on the EXPBILLABLE field in the PROJECT table
BILLED		If the expense has been billed the field is "T" otherwise it is "F".	"F"
ARCHIVE		"T" if client is flagged for archive, "F" otherwise.	"F"
INTEGRATE	This field is used internally by the software	**Field not available for linking**	Blank

PART

4

Time and Expense Entry

This part of the user's guide provides all the necessary information for employees to enter, submit, review and report on **time** and **expenses**.

Since accurate and efficient time and expense entry is the core to successful time and project tracking, DOVICO Timesheet's time and expense entry views were purposely designed with the end-user in mind.

With employees only seeing the specific projects and task assigned to them, the time entry view permits time to be entered while working or at the end of the day or week. Additional features such as the ability to create favorites, customize views and review data quickly and efficiently further enhances the time and expense entry experience.

In Time and Expense Entry …

Time Entry

Introduction to the Timesheet screen

The time entry screen (**Timesheet**) contains 5 specific sections designed to assist you in tracking time efficiently.

1. The **Assignment Tree** displays an organizational representation of **all the tasks** you are able to track time against (your assignments). It is primarily used to add specific assignments to the timesheet grid.

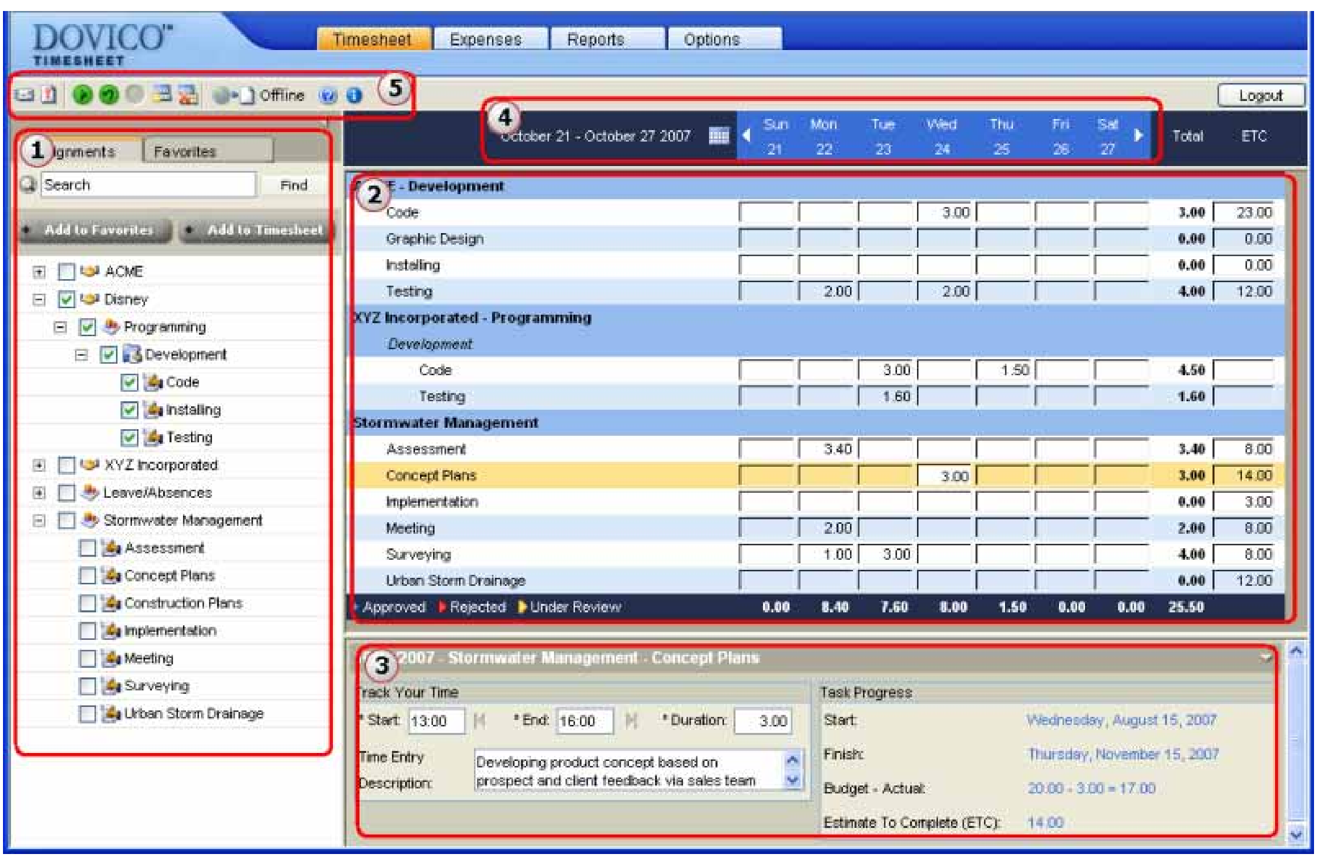
2. The **Timesheet grid** area of the screen displays assignments in a weekly grid and is the location where employees enter their time.

3. The **Time Entry Details** area of the screen displays a number of editable and non-editable fields detailing each time entry.

4. The **Calendar Row** identifies the week displayed and permits the user to move to different weeks.

5. The **Toolbar** displays buttons which carry out commands such as Submit, Start, etc..

The **Tabs** are used to navigate to other functions.



Time Entry Toolbar buttons

Timesheet toolbar

	Submit: To send your time entries to the DOVICO Timesheet database.
	Rejected time entries: To see a list of weekly timesheets that contain rejected time entries.
	Start: To start timing on the selected task.
	Start From Last: To start timing on the selected task and to set the start time to equal the previous time entry's end time. The **Show Start/End times option** must be enabled to use Start From Last.
	Stop: To stop timing.
	Create a multiple row: To create an **additional timesheet grid row** for the selected task.
	Delete selected rows: To delete an individual time entry row from the timesheet grid.
	Offline: To work in an offline (disconnected) mode. While in Offline mode, time entry data is saved on the user's computer. When returning to "live" mode, the saved data is forwarded to the DOVICO Timesheet database.
	Synchronize: To temporarily reconnect to the database.
	Online: To reconnect to the database.
	Help: To launch the Help system.
	About: To display information on the software version.
Logout	**Logout**: To logout of DOVICO Timesheet.
Administration	**Return to Administrative views:** To access the administrative functions. The administrative functions are only available to those with suitable **software access** rights and **security level**.

Adding Assignments to the Timesheet grid

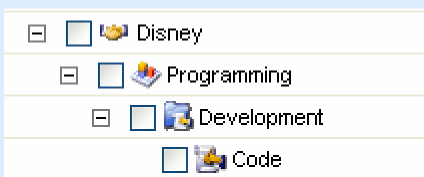
Before you can track time against an **assignment,** that assignment must be added to the timesheet grid. The following describes how to use the assignment tree to (1) add task assignments to the timesheet grid and (2) how to remove task assignments from the timesheet grid.

To add task assignments to the timesheet grid:

1. Click the **Assignments tab** Assignments.

How assignments are organized in the assignment tree

- The assignment tree displays a **hierarchical representation** of your assignments by:



1. **Clients** (optional)
2. **Projects**
3. **Task Groups** (optional)
4. **Tasks**.

- Items within each level are arranged **alphabetically**.
- Clicking the **+** (or **-**) symbol next to an item **expands** (or **collapses**) that item.
- When the **checkbox** for a client, project or task group is checked, all **sub-items** are also automatically **checked**. Individual items can be checked by first expanding the branch and then checking the individual items.
- Assignments without a designated client appear near the end of the list (after the last client in the assignment tree).

2. **Locate** and **check** ☑ one or more assignments to be added to the timesheet grid.
3. Click the **Add to Timesheet** button.

   The task assignments added to the timesheet grid are temporarily highlighted in green.

Notes:

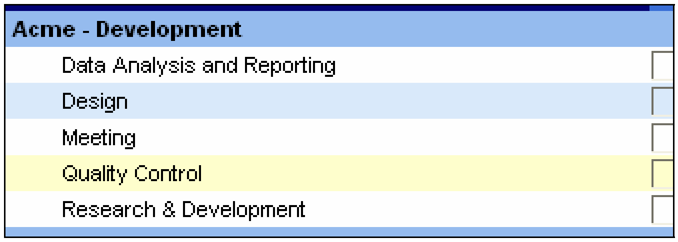
- The **assignments checked** ☑ are only added to the timesheet grid currently displayed.
- Any **assignments previously added** to the timesheet grid are not removed.
- **Duplication** of assignments within the timesheet grid does not occur if Add to Timesheet is clicked more than once.
- There is a limit to the number of task assignments that employees can add to their weekly timesheet grid (and Favorites). By default, this limit is 100 task assignments. This limit can be modified by the manager or system administrator. (page 181)
- An administrative feature permits a manager to **hide assignments** when the date is outside the task's scheduled start and finish dates. For this reason, the list of available assignments may vary when moving from week to week.

Tips:

- Use **Favorites** (page 249) to create a list of assignments that can be easily (or automatically) added to any timesheet grid.
- **Right click** within the assignment tree to access useful features such as **Collapse All**, **Select All**, etc.
- Use the **Find** box to quickly find an item.
- **Mouse over** the task or project names to see a description of the item (if any).

To remove task assignments from the timesheet grid:

1. Select the task row to delete by clicking on the **task's name** in the timesheet grid. A selected row is highlighted in yellow.



2. Click the **Delete row** button on the toolbar.

Notes:

- Only task rows can be removed. The Client/Project and Task Groups rows are automatically removed when all dependent tasks are removed.
- To select multiple tasks, select the tasks while keeping the CTRL key pressed or use Shift to select a range of rows.
- Rows with approved time entries or time under review are not removed but any un-submitted or rejected time within that row is deleted.
- Deleting a task row with **multiple rows** deletes all rows for that task.

Tip: Use can also use your keyboard's Delete key to remove rows.

Entering time in Bulk

Time entry can be accomplished in three basic ways: 1. Entering a duration against a task (**Bulk**). 2. Track time while you work (**Timer**). 3. Enter time using Start/End times (**In/Out**). The following describes how to enter a duration (**Bulk**) for a task and also describes how to enter unique details for the time entry.

Prerequisite:

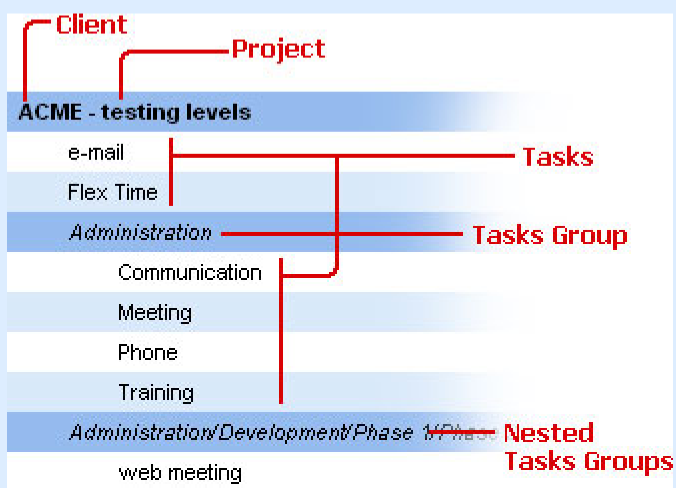
- Before you can enter time on a task assignment, that task must be **added to the timesheet grid** (page 233).

To enter a duration (bulk) against a task:

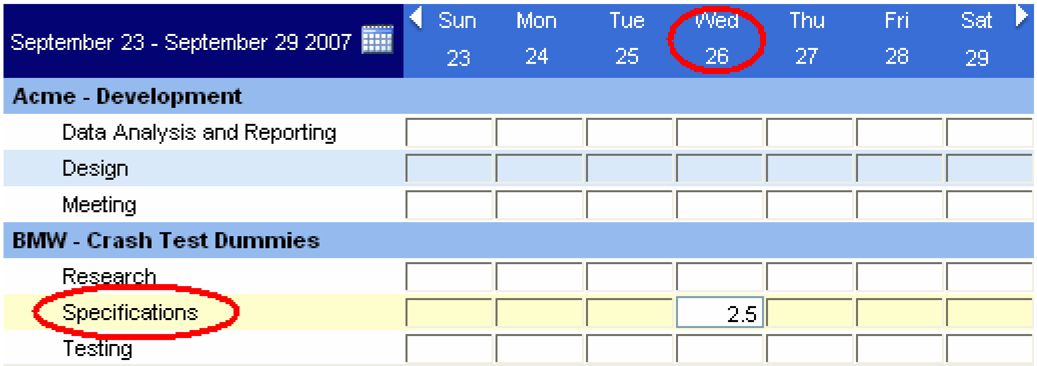
1. Click the **Timesheet tab** located near the top of the screen.

How assignments are displayed in the timesheet grid

- The timesheet grid displays the **assignments alphabetically** using the following hierarchy: Clients, Projects, Task Groups and Tasks.
- Within the timesheet grid, the assignment hierarchies are identified using indented levels and row colors. Each client + project combination appears on one line at the top most level on a dark blue row. Tasks assigned to this project are placed below and indented on alternating white and light blue rows. For those assignments organized by task groups, the task groups appear, on a dark blue row, indented below the client/project level. Nested task groups (a task group within a task group) are listed on one line.



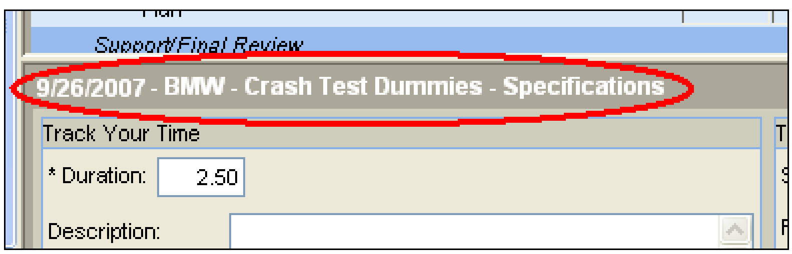
2. Move to the applicable **week** by clicking the calendar row's arrow (or) buttons. When logging into DOVICO Timesheet, the current week is displayed by default.
3. Click in the **cell** intersecting the appropriate **task** and **day of the week**.
4. Enter the **number of hours** worked against that task. Time can be entered in hh:mm or in decimal format (2:30 or 2.5), but always appears in decimal format when saved.



*Example: **2.5 hours** entered against the Crash Test Dummies' **Specifications** task for Wednesday, September 26th.*

When a cell or task assignment is selected, the entire row is highlighted in yellow.

5. (**Optional**) Modify or enter **details** for this time entry using the **Time Entry Details** area of the screen. Make sure you are entering or modifying data for the proper time entry by verifying the task assignment's name in the Time Entry Details title bar.



Information on the Time Entry Details area.

Time entry details are only displayed when an individual cell is selected in the timesheet grid. The amount of information displayed in the time entry details area can be configured using the **Options** tab. The following describes the default fields. For a detailed description of all available fields, see **Time Entry details** (page 242).

Duration: This field displays the duration entered in the timesheet grid (step 4). You can modify the duration using this field.

Time Entry description: Use this text field to edit or enter unique details or information relating to this time entry (up to 4000 characters). By default, the description shown is a copy of the task description entered by the manager or system administrator.

Overtime Rate: This drop-down list displays the available Company Overtime Rates that can be applied to this time entry.

Billable: Check this box if the time is billable. The default setting displayed may change depending on the task assignment selected.

Client Overtime Rate: This drop-down list displays the available Client Overtime Rates that can be applied to this time entry if the task is billable.

Custom Fields: Custom data fields created by your manager or system administrator appear in the time entry details area and may be configured as "required" for each time entry.

6. (**Optional**) Modify the **ETC** (in hours) located at the far right end of the timesheet grid for this assignment. Enter a value of 0 if the task has been completed or leave blank if ETCs are not used.

That's it. A time entry has now been entered. Keep reading to learn about other useful features and functions for time entry.

In some situations you may need to add **multiple time entries** for the **same task assignment** on the **same day** with each time entry having its unique details.

For example; on the same day, you worked 3 hours on a task assignment and then later work 2 overtime hours on this same task. Although both time entries are for the same task, each entry can be considered unique for billing, payroll, reporting, etc. Another example is having to enter additional time against a task after the time has been submitted.

To enter multiple time entries for the same assignment on the same day:

1. Click on the task row where the additional row is to be created.
2. Click the **Create Multiple row** button located on the toolbar. An empty row is created below the existing time entry.
3. Enter the 2nd time in the **empty cell**. A new empty row is automatically created.
4. Modify the **time entry details** as required.
5. (**Optional**) Click the **Collapse row** button.

   Collapsed rows can be easily identified as their daily total hours appear in **bold** characters and the Expand button appears at the far left end of the row.

Notes:

- Data is **automatically saved** whenever the user switches cells, changes views, etc. Data is not saved if the user logs out or closes the browser while adding or editing data in a field.
- Time can be entered in **hh:mm** or in **decimal** format, but always appears in decimal format when saved.
- The **maximum number of hours** that can be entered for any day is 23.98 hours (23:59).
- Time entries that have been **Submitted** or **Approved** cannot be edited.

Tips:

- **Right click** in the timesheet grid to create a multiple row, delete a row, etc.
- **Double click** on a multiple time entry task row to expand or collapse the row.
- To view time for **multiple weeks**, run any one of the numerous **time entry reports**.
- Increase the **Timesheet grid area** of the screen by minimizing ( ) or resizing the Time Entry Details and/or the Assignment tree.
- The **ETC column** and some information in the Time Entry Details area can be hidden. Click the **Options** tab.
- Mouse over the project or task names in the timesheet grid or in the assignment tree to see their **descriptions** (if any).

Track time while working

Time entry can be accomplished in three basic ways: 1. Track time while you work (**Timer**). 2. Entering a duration for a task (**Bulk**). 3. Enter time using Start/End times (**In/Out**). The following describes how to track time while working (like a stopwatch) and also describes how to enter unique details for the time entry.

Note: The timer function can only be used on the current day (today).

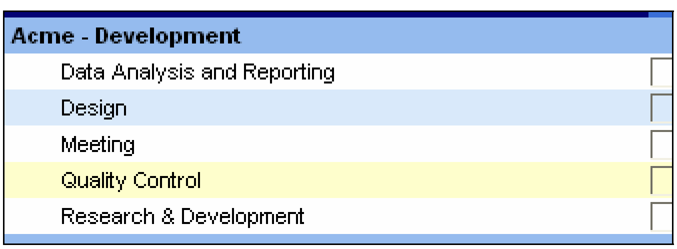
Tip: When using the Timer function it's a good practice to enable the **Show Start/End times** option in the Options tab (page 247). This will allow you to easily correct any errors made while using the timer.

Prerequisite:

- Before you can begin timing on a task assignment, that task must be **added to the timesheet grid** (page 233).

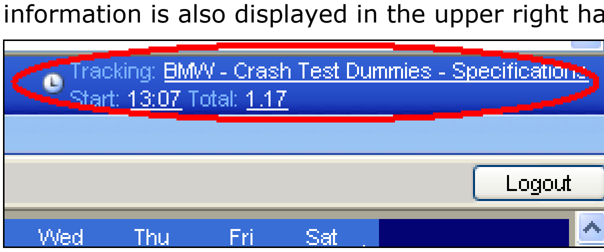
To track time while working:

1. Click the **Timesheet tab** located near the top of the screen.
2. Move to the current **week** by clicking the calendar row's arrow (or) buttons. When logging into DOVICO Timesheet, the current week is displayed by default.
3. Select the task to time against by clicking on the **task's name** in the timesheet grid. A selected row is highlighted in yellow.



4. Click the **Start** button (located on the toolbar), or click the **Start from Last** button if available .

   While tracking time, the duration is automatically incremented in the task's cell. Tracking information is also displayed in the upper right hand corner of the screen.



5. (**Optional**) While tracking time (or after), **modify** or enter details for this time entry using the time entry details area of the screen (the lower half of the screen).

Information on the Time Entry Details area.

Time entry details are only displayed when an individual cell is selected in the timesheet grid. The amount of information displayed in the time entry details area can be configured using the **Options** tab. The following describes the default fields. For a detailed description of all available fields, see **Time Entry details** (page 242).

Duration: This field displays the duration being tracked in the timesheet grid (step 4). You can modify the duration using this field after you stopped timing.

Time Entry description: Use this text field to edit or enter unique details or information relating to this time entry (up to 4000 characters). By default, the description shown is a copy of the task description entered by the manager or system administrator.

Overtime Rate: This drop-down list displays the available Company Overtime Rates that can be applied to this time entry.

Billable: Check this box if the time is billable. The default setting displayed may change depending on the task assignment selected.

Client Overtime Rate: This drop-down list displays the available Client Overtime Rates that can be applied to this time entry if the task is billable.

Custom Fields: Custom data fields created by your manager or system administrator appear in the time entry details area and may be configured as "required" for each time entry.

Note: If you begin timing on a task that already has a time entry for that day, time is not added to the existing entry but a new (multiple) row is created and tracking takes place in this new row.

To stop tracking time:

1. Click the **Stop** button on the toolbar.
2. (**Optional**) Modify or enter details for this time entry using the lower half of the screen.
3. (**Optional**) Modify the **ETC** (in hours) located at the far right end of the timesheet grid for this assignment. Enter a value of 0 if the task has been completed or leave blank if ETCs are not used.

That's it. A time entry has now been entered.

Notes:

- You can only track time against a task. Time cannot be tracked directly against a project, client or task group.
- Data is **automatically saved** whenever the user switches cells, changes views, etc. Data is not saved if the user logs out or closes the browser while adding or editing data in a field.
- The Timer function can only track time **on the current day**.
- The **maximum number of hours** that can be entered for any day is 23.98 hours (23:59).
- Time entries that have been **Submitted** or **Approved** cannot be edited.

Tips:

- While timing on a task, you can edit other time entries or move to different views within DOVICO Timesheet.
- While timing on a task, you can automatically stop the current timer and start timing on a new task by simply selecting the new task and clicking the Start button.
- **Right click** in the timesheet grid to start/stop timing, to create a multiple row, delete a row, etc.
- **Double click** on a multiple time entry task row to expand or collapse the row.
- To view time for **multiple weeks**, run any one of the numerous **time reports**.
- Increase the **timesheet grid area** of the screen by minimizing ( ) or resizing the time entry details and/or the assignment tree.
- The **ETC column** and some information in the time entry details area can be hidden. Click the **Options** tab.
- Mouse over the project or task names in the timesheet grid or in the assignment tree to see their **descriptions**.

Entering time using Start/End times

Time entry can be accomplished in three basic ways: 1. Entering a duration against a task (**Bulk**). 2. Track time while you work (**Timer**). 3. Enter time using Start/End times (**In/Out**).

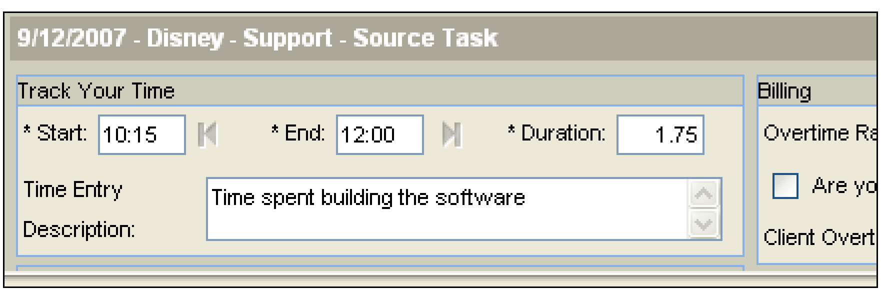
The following describes how to enter time using Start/End times (**In/Out**) for a task and also describes how to enter unique details for the time entry.

Prerequisites:

- Before you can enter start/end times for a time entry, you must enable "**Show Start/End times**" using the Options tab. (page 247)
- Before you can enter time on a task assignment, that task must be **added to the timesheet grid**. (page 233)

To enter Start/End times against a task:

1. Click the **Timesheet tab** located near the top of the screen.
2. Move to the applicable **week** by clicking the calendar row's arrow (or) buttons. When logging into DOVICO Timesheet, the current week is displayed by default.
3. Click in the **cell** intersecting the appropriate **task** and **day of the week**.
4. In the Time Entry Details area of the screen (bottom), enter **Start** and **End** times for the time entry. Start and End times must be entered in the hh:mm format. Make sure you are entering time for the proper task and day by verifying the task assignment's name in the Time Entry Details title bar.



The **Fill Gap Backwards** button will be enabled if there is a time gap between the Start time entered for this time entry and the Stop time for the previous time entry. Click this button to set the Start time so that it is equal to the end time of the previous entry. The Fill Gap Backwards button is disabled if there is no available gap to fill.

The **Fill Gap Forward** button will be enabled if there is a time gap between the End time entered for this time entry and the Start time for the next entry. Click this button to fill the gap. The Fill Gap Forward button is disabled if there is no available gap to fill.

5. (**Optional**) Modify or enter other **details** for this time entry using the **Time Entry Details** area of the screen.

Information on the Time Entry Details area.

Time entry details are only displayed when an individual cell is selected in the timesheet grid. The amount of information displayed in the time entry details area can be configured using the **Options** tab. The following describes the default fields. For a detailed description of all available fields, see **Time Entry details** (page 242).

Duration: This field displays the duration as calculated from the Start and End times.

Time Entry description: Use this text field to edit or enter unique details or information relating to this time entry (up to 4000 characters). By default, the description shown is a copy of the task description entered by the manager or system administrator.

Overtime Rate: This drop-down list displays the available Company Overtime Rates that can be applied to this time entry.

Billable: Check this box if the time is billable. The default setting displayed may change depending on the task assignment selected.

Client Overtime Rate: This drop-down list displays the available Client Overtime Rates that can be applied to this time entry if the task is billable.

Custom Fields: Custom data fields created by your manager or system administrator appear in the time entry details area and may be configured as "required" for each time entry.

6. (**Optional**) Modify the **ETC** (in hours) located at the far right end of the timesheet grid for this assignment. Enter a value of 0 if the task has been completed or leave blank if ETCs are not used.

That's it. A time entry has now been entered. Keep reading to learn about other useful features and functions for time entry.

In some situations you may need to add **multiple time entries** for the **same task assignment** on the **same day** with each time entry having its unique details.

For example; on the same day, you worked 3 hours on a task assignment and then later work 2 overtime hours on this same task. Although both time entries are for the same task, each entry can be considered unique for billing, payroll, reporting, etc. Another example is having multiple entries for the same task on the same day but each time entry having its own description.

To enter multiple time entries for the same assignment on the same day:

1. Click on the task row where the additional row is to be created.
2. Click the **Create Multiple row** button located on the toolbar. An empty row is created below the existing time entry.
3. Enter the 2nd time in the **empty cell**. A new empty row is automatically created.
4. Modify the **time entry details** as required.
5. (**Optional**) Click the **Collapse row** button.

   Collapsed rows can be easily identified as their daily total hours appear in **bold** characters and the Expand button appears at the far left end of the row.

Notes:

- Data is **automatically saved** whenever the user switches cells, changes views, etc. Data is not saved if the user logs out or closes the browser while adding or editing data in a field.
- The **maximum number of hours** that can be entered for any day is 23.98 hours (23:59).
- Time entries that have been **Submitted** or **Approved** cannot be edited.

Tips:

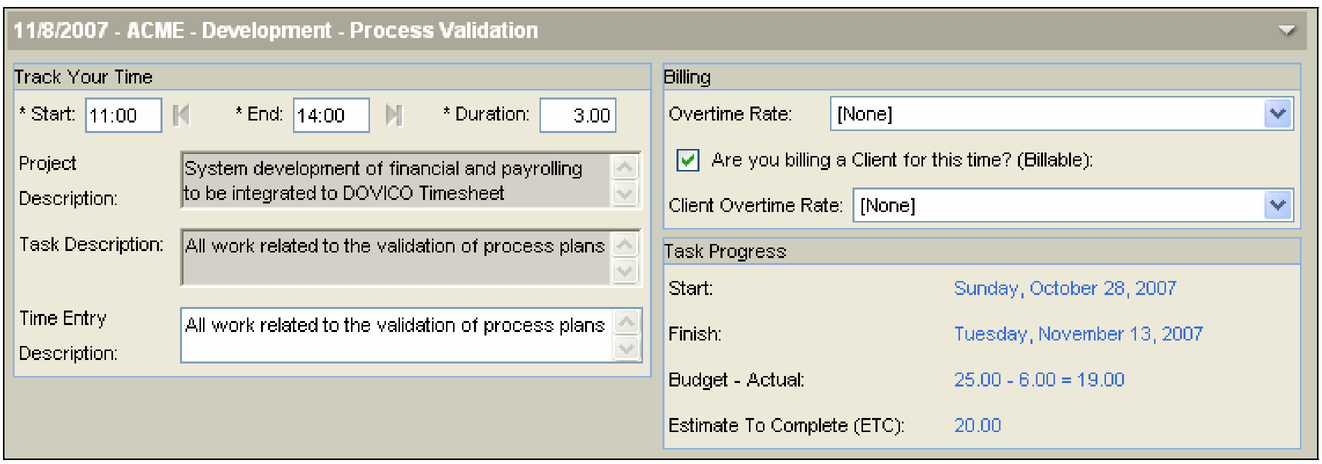
- **Right click** in the timesheet grid to create a multiple row, delete a row, etc.
- **Double click** on a multiple time entry task row to expand or collapse the row.
- Increase the **Timesheet grid area** of the screen by minimizing ( ) or resizing the Time Entry Details and/or the Assignment tree.
- The **ETC column** and some information in the Time Entry Details area can be hidden via the **Options** tab.
- Mouse over the project or task names in the timesheet grid or in the assignment tree to see their **descriptions** (if any).

Time Entry Details

For each time entry entered in the timesheet grid, unique details can be added or edited. The **Time Entry Details** area of the screen displays the editable and non-editable fields that are unique to each time entry.

The following specifies the content of the time entry details area of the screen.

> **Note:** Some of the fields detailed below may not appear on your screen. Certain fields can be hidden or disabled using specific settings in the **Options** tab or can be disabled by your manager using administrative functions.



Track Your Time

Start: The Start time for the time entry.

If the time was entered as a duration (**Bulk**), the Start time is set to equal the end time of the previous time entry. If no previous time entries exist for that day, the Start time is set as specified in the "My day starts at" setting in the Options tab.

If the time was tracked while working (**Timer**), the Start time is set to the precise time the Start button was pressed.

If the time was tracked while working (**Start from Last**), the Start time is set to the end time of the previous time entry or to the "My day starts at" time if Start from Last was used to begin the day.

> Click the **Fill Gap Backwards** button to set the Start time so that it is equal to the end time of the previous entry. The Fill Gap Backwards button is disabled if there is no available gap to fill.

End: The End time for the time entry.

If the time was entered as a duration (**Bulk**), the End time is calculated as the end time of the previous time entry plus the duration of this time entry.

If the time was tracked while working (**Timer**), the End time is set to the precise time the Stop button was pressed.

> Click the **Fill Gap Forward** button to set the End time so that it is equal to the Start Time of the next entry. The Fill Gap Forward button is disabled if there is no available gap to fill.

Duration: The total time worked against the task either entered manually or calculated based on the Start/End times.

Notes:

- Durations can be entered in **hh:mm**, or in **decimal form**, but always appear in decimal form when saved.
- Start and End times must be entered in **hh:mm** form.

Project Description: The project description entered by the manager or administrator.
Task Description: The task description entered by the manager or administrator.
Time Entry Description: An optional description field available to the user to enter details relating to the time entry (up to 4000 characters). By default, the description shown is a copy of the task description.

Custom Fields

Custom Fields can be created by your manager or system administrator to add additional fields for each time entry. Custom fields configured as 'required' display an asterisk (*) next to the field name.

Task Progress

Task Progress displays a task's progress against budgeted time.

The task's scheduled **Start and Finish** dates as defined by the manager or administrator using the Budgeted Time & Costs view.

Budget – Actual. Displays the Budgeted hours required to complete a task, the Actual hours worked against that task and the difference. The difference appears in red when the actual hours worked is greater than the budgeted hours. Note that Budgeted hours are entered in the administrative tool's Budgeted Time & Costs view and the Actual hours are the approved, rejected, under review and un-submitted time entries for that task.

Displays the task's **Estimate to Complete** entered in the timesheet grid's **ETC** column.

Note: If a task is a global task then "N/A" appears in the Task Progress information fields.

Billing

Overtime Rate: Lists all the Company Overtime rates available for this time entry.

Billable: Used if the time entry is billable. The default setting displayed for the Billable checkbox changes depending on the task assignment selected. The default setting for each task assignment is configured at the project structure level and can only be modified by the project manager or system administrator using the Budgeted Time & Costs view.

Client Overtime Rate: Lists all the Client Overtime rates available for this time entry.

Submitting Time

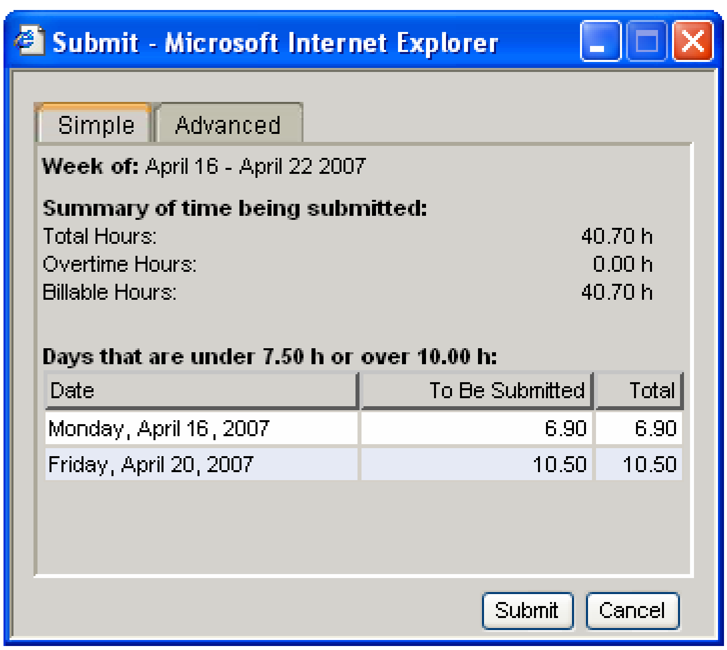
Periodically, as defined by your manager or system administrator, you must submit your time entries for review, approval, etc.

The following describes how to submit time entries for (1) an entire week or for (2) a specific period, and explains the status of time entries after they have been submitted.

Warning: Once time entries have been submitted, they are no longer available to be edited. However, additional time entries can be added and submitted for the same date range.

To submit time for the week currently displayed:

1. Move to the applicable **week** by clicking the calendar row's arrow (or) buttons.
2. Click the **Submit** button on the toolbar. The Submit window opens.



3. Click the **Simple tab**.
4. Review the **Summary statistics** for the time to be submitted.

- **Total Hours**: The total number of hours to be submitted for the week.
- **Overtime hours**: The total number of overtime hours to be submitted for the week.
- **Billable hours**: The total number of billable hours to be submitted for the week.
- **(Optional) Days that are under...:** Lists the days not meeting the minimum or maximum hours as setup in **Options**.

Notes:

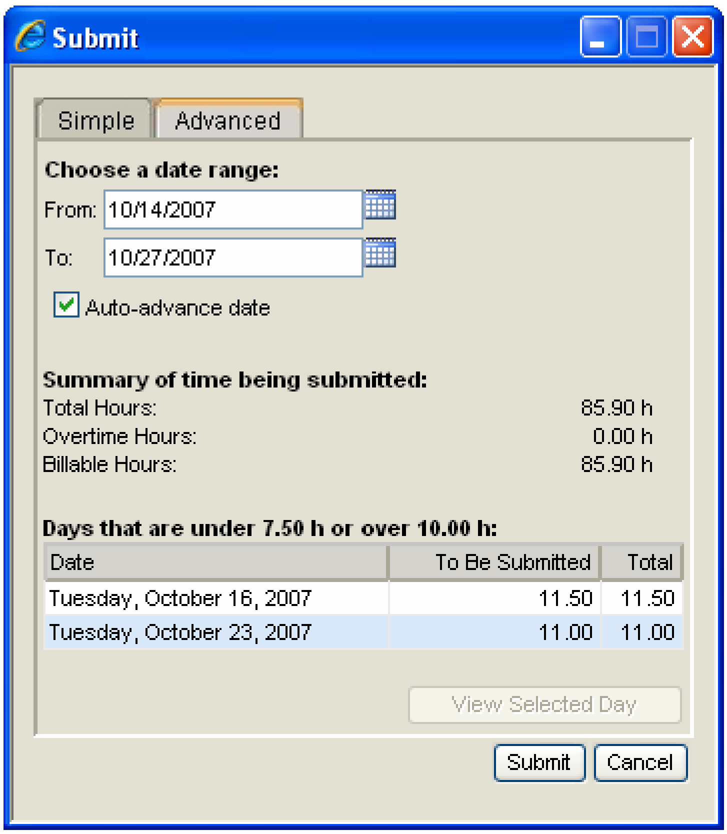
- The Total displayed in the "Days that are under" summary is the sum of the time to be submitted plus any time previously submitted for that day.
- Summary Overtime and Billable hours may not be displayed if these **options** are hidden in the time entry screen.

5. Click **Submit**.

> **Note:** Those submitting time on a **daily basis** can use the instructions above (*To submit time for the week currently displayed*) as the software prevents time entries from being submitted more than once.

To submit time for a specific date range:

1. Click the **Submit** button on the toolbar. The Submit window opens.
2. Click the **Advanced tab**.



3. Select the **From** and **To** dates by clicking the calendar icons.
4. Click the **Refresh** button.
5. Review the **Summary statistics** for the time to be submitted.

- **Total Hours**: The total number of hours for the selected period.
- **Overtime hours**: The total number of overtime hours for the selected period.
- **Billable hours**: The total number of billable hours for the selected period.
- **(Optional) Days that are under...:** Lists the days not meeting the minimum or maximum hours as setup in **Options**.

  To view or edit time entries for a specific day, select the day and click the **View Selected Day** button.

> **Notes:**
> - The Total displayed in the "Days that are under" summary is the sum of the time to be submitted plus any time previously submitted for that day.
> - Summary Overtime and Billable hours may not be displayed if these **options** are hidden in the time entry screen.

6. Select the **Auto-advance date** checkbox to have the From and To dates automatically advance with time. When un-checked, the selected date range is saved.
7. Click **Submit**.

Status of submitted time entries

If your manager or administrator has setup approval processes, some or all of your time submitted may be reviewed, approved or rejected by one or more managers.

Approved entries display a blue tag next to the time entry and **cannot be edited**.

Entries Submitted (Under Review) display an orange tag and cannot be edited.

Rejected entries display a red tag .

Edit Rejected time

When a manager or administrator rejects time entries, these are returned to you for editing and re-submission. The following explains how to (1) determine if you have rejected time entries, (2) how to edit and (3) how to re-submit those rejected time entries.

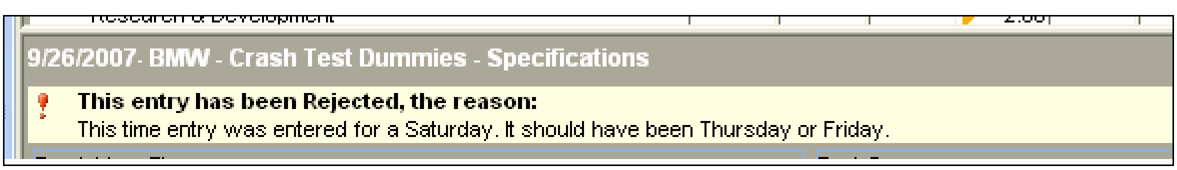
To determine if you have rejected time entries:

Whenever one or more time entries have been rejected, an exclamation icon is displayed in the Timesheet tab. Also, within the timesheet grid, a red tag appears next to any rejected time entry.

To edit a rejected time entry:

1. Click the **Reject** button on the toolbar to display a list of all weeks containing rejected time entries.
2. **Select a week** and click the **View** button to display that week.
3. **Click in any time entry cell** showing a red tag .

   The time entry details area's **title bar** displays the **reason** the time entry was rejected as entered by the person who rejected the time entry.



4. Using the time entry details area, make any **necessary changes** to the time entry.
5. Repeat **steps 3 and 4** for each rejected time entry.

   Click the Reject button (**Step 1**) again to see if there are remaining rejected entries.

To re-submit rejected time entries:

1. When all rejected time entries have been edited, click the **Submit** on the toolbar to begin the **submitting process**.

Note: Time entries that have been **Submitted** or **Approved** cannot be edited.

Time Entry Options

The Time Entry **Options** tab permits a user to determine what information and data fields are displayed in the time entry screen, as well as establish settings for other personal preferences.

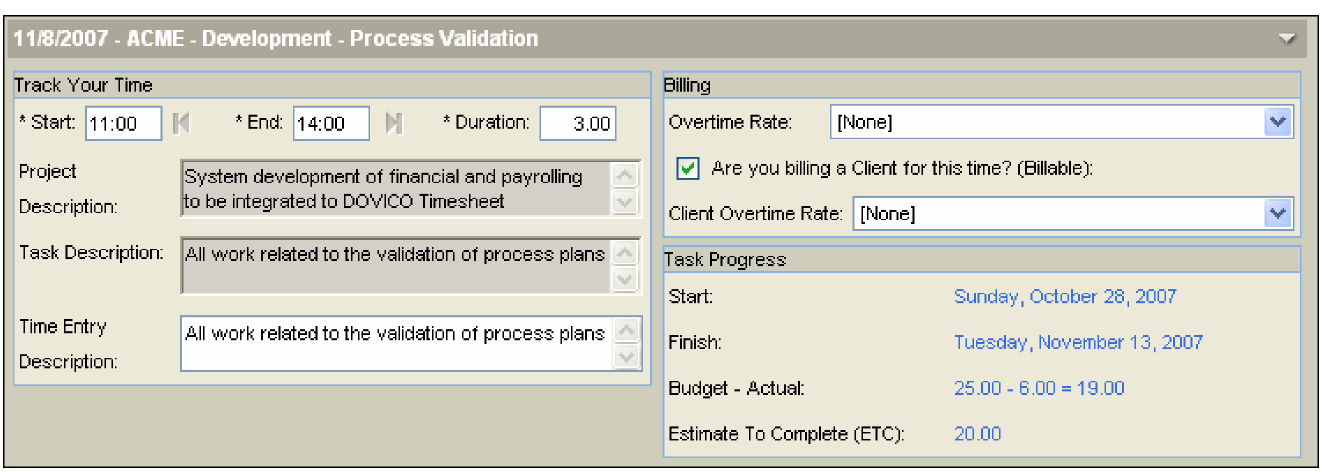
> **Note:** Some options described below may not be available if the system administrator or manager has chosen to always show or hide some items.

To modify time entry options:

1. Click the **Options** tab at the top of the screen.

   Available time entry options:

   - Show **Start / End** times: Show/hide the Start and End times in the time entry details area of the time entry screen.
   - Show **Project Description**: Show/hide the project description in the time entry details area. When hidden, the project description can still be viewed by mousing over the project name in the assignment tree or timesheet grid.
   - Show **Task Description**: Show/hide the task description in the time entry details area. When hidden, the task description can still be viewed by mousing over the task name in the assignment tree or in the time entry grid.
   - Show **Time Description**: Show/hide the time entry description field in the time entry details area.
   - Show **Billable**: Show/hide the billable checkbox in the time entry details area.
   - Show **Client Overtime**: Show/hide the Client Overtime Rate drop-down list in the time entry details area.
   - Show **Company Overtime**: Show/hide the Company Overtime Rate (Overtime Rate) drop-down list in the time entry details area.
   - Show **Task Progress information**: Show/hide the **Task Progress information** in the time entry details area.
   - Show **ETC column**: Show/hide the **ETC** column in the timesheet grid.



   - **Password** and **Confirm password**: Used to change your login password.
   - **My week starts on:** Select the default day of the week which starts each week for time entry.

- **My day starts at**: Set "My day starts at" to the time you normally start working. It is used to set a default start time when the "Start from last" button is used at the beginning of each day, or used to set the start time when the day's first entry time is entered as a duration.
- **Default sheet for new week**: This option determines which assignments are added to the timesheet grid when a new week is started.
  - **Prompt for options**: Shows all options every time a new week is started.
  - **Blank sheet**: This option leaves the timesheet grid blank. You must **manually add the assignments** or manually use **Favorites**.
  - **From favorites**: This option automatically adds all assignments located in the Favorites tab to the timesheet grid.
  - **From last week**: This option copies all the task row assignments from the previous week to the new timesheet grid. No time entries are copied.
  - **From last week without blank rows**: This option copies all the task rows from the previous week to the new timesheet grid and removes any blank rows (those having no time entries).
- **When submitting, warn if day**: To set a warning for minimum or maximum number of working hours per day. When submitting time, the submit summary window displays all days that exceed either limit.

2. Click **Apply**.

Other functions

Favorites

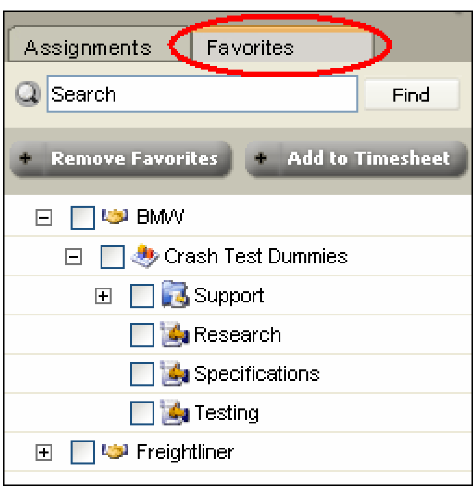
Favorites is a personalized collection of task assignments useful for those who work on the same assignments each week and who want a quick method to add these favorites to the timesheet grid.

The following describes how to (1) add assignments to your favorites, how to (2) manually add your favorite assignments to the timesheet grid and how to (3) remove assignments from your favorites.

To add assignments to favorites:

1. Click the **Assignments tab**.
2. In the assignments tree, **check** ☑ **only those items** you want to add to your favorites. You can add more assignments to your favorites at any time.
3. Click the **Add to Favorites** button.

   Now when you begin a new week, you'll have the **option** to automatically have all your favorites added to the timesheet grid.
4. (**Optional**) Click the **Favorites tab** to review the favorites.



Notes:

- There is a limit to the number of task assignments that employees can add to their Favorites (and to their weekly timesheet grid). By default, this limit is 100 task assignments. This limit can be modified by the manager or system administrator. (page 181)
- If you have all the assignments for a given project already added to your favorites and your manager creates a new assignment for this project, this new assignment will not be automatically added to your favorites.
- Some assignments selected as favorites may not automatically be added to the timesheet grid. This occurs when a project/task status has been changed or when a task is not scheduled to be worked on. A warning message is displayed when this occurs.

Tips:

- To have your Favorites automatically added to each new week, review the "Default sheet for new week" setting in the **Options** tab.
- Use the **Right click** function for quick access to some functions in the assignment tree.
- Use the **Find** function to quickly find a specific client, project, task group or task in the assignment tree.

How to manually add your favorites to the timesheet grid:

1. Click the **Favorites tab**.
2. **Check** the items to add to the timesheet grid, or right click and choose Select All.
3. Click **Add to Timesheet** button to add your favorites to the timesheet grid.

   The task assignments added to the timesheet grid are temporarily highlighted in green.

How to remove assignments from your favorites:

1. Click the **Favorites tab**.
2. **Check** those items you want **to remove** from your favorites.
3. Click the **Remove Favorites** button.

Moving to a different week

By default, the current week's timesheet grid is displayed after logging in. The following describes how to display a different week, month or year in the timesheet grid.

- To move **forward** (or **backwards**) one week, click the arrow buttons (or) located in the calendar row.
- To move **more than 1 week at a time**, or to move to a different **month** or **year**, click the calendar button and click on a different week, or select a different month or year from either drop-down list.

Tips:

- Click the blue **Today** bar at the bottom of the calendar to move to the current week.
- To close the calendar without selecting another week, click the calendar icon again or click elsewhere in the view or use your keyboard's Esc key.

Starting a new week

When moving to a week that has no assignments in the timesheet grid (**new week**), you may be prompted to select which assignments to add to the timesheet grid. The following details those options.

Use blank sheet: This option leaves the timesheet grid blank. You must **manually add the assignments** or use **Favorites**.

Use your favorites: This option adds all the Favorite assignments to the timesheet grid.

Use same rows as last week: This option copies all the assignments from the previous week to the timesheet grid. No time entries are copied. If the previous week has no assignments, the timesheet grid is left blank.

Use same rows as last week, without blank rows: This option copies all the assignments from the previous week to the timesheet grid and removes any blank rows (those having no time entries). If the previous week has no assignments, the timesheet grid is left blank.

Note: If you are not prompted on how to populate the timesheet grid when starting a new week, see the "Default sheet for new week" setting in the **Options** tab.

Tip: You can manually add assignments or use Favorites at any time.

Date and Time formats

The Start/End **time** format for time entry is the 24 hour clock format (e.g. 13:30) and cannot be modified. Users manually entering or adjusting start/end times in the time entry details area of the time entry view must use this format.

The Duration **time** format for time entry can be either hh:mm or decimal formats (3:30 or 3.5), but values are converted to decimal (3.5) when saved.

ETC

The **ETC** column (Estimate to Complete) displayed at the far right of the timesheet grid is an optional column used by employees to enter how many **hours** they **estimate** are required to **complete the task**.

ETC values are sent to the database and enable managers to view estimated time to completion reports to aid in tracking project development and employee efficiency.

Notes:

- The ETC column can be hidden using the **Options** tab.
- Historical ETC values are not saved. The ETC value entered for a task in a given week appears in all previous and future weeks.
- ETCs are not submitted along with time entries but are immediately updated in the database whenever an ETC value is added or modified.
- When an ETC value of 0 is entered for a task, it is displayed as "Complete" in various administrative views and reports.
- The ETC value is also displayed in the Time Entry Details area (**Task Progress Information**).

Right Click

Right Click functions are available in the assignment tree and timesheet grid areas of the time entry screen giving the user quick access to certain functions and features.

Assignment tree:

- **Collapse All**: Collapses all open branches.
- **Select All**: Selects all items in the assignment tree.
- **Unselect All**: Unselects all items in the assignment tree.
- **Add To Favorites**: Adds the selected items to your favorites.
- **Add To Timesheet**: Adds the selected items to the timesheet grid.
- **Refresh**: Refreshes the assignment lists.
- **Show All**: An administrative feature permits a manager to hide assignments when the date is outside the task's scheduled start and finish dates. This option shows **all assignments** available regardless of the assignments' start and finish dates.

Timesheet grid:

- **Start Timer**: Starts the timer on the selected task assignment.
- **Start Timer from Last**: Starts the timer on the selected task assignment and sets the Start time so that it is equal to the end time of the previous time entry. The **Show Start/End time option** must be enabled to use Start From Last.
- **Stop Timer**: Stops the timer.
- **Create Multiple Row**: Creates an **additional time entry row** for the selected task assignment.
- **Delete Selected Rows**: Deletes all selected rows.
- **Expand**: Expands a multiple row.
- **Collapse**: Collapses a multiple row.

Find

The **Find** function is useful when trying to locate a specific client, project, task group or task from a long list of assignments within the assignment tree.

To find a specific item:

1. Enter the text in the Find's **text box**. Enter the full name or simply the first few letters.
2. Click the **Find** button to find the first occurrence of this item.
3. (**Optional**) Click **Find Again** to locate the next occurrence.

Notes:

- You **cannot use wildcards** (*, %, etc) in the Find's text box.
- A Find always begins from the top of the assignment tree.

Tip: If you have many items beginning with D, there is a way to narrow your search even more. For example, enter `D[a-m]` to only search for items beginning with D and with the next letter between a and m. Or enter `D[^a-m]` to search for items beginning with D and whose next letter is not between a and m.

Show All

An administrative feature permits a manager or system administrator to hide a task assignment from time entry users when the date is outside the task's scheduled start and finish dates.

This option does not prevent employees from tracking time against a task but simply reduces the list of tasks displayed in the time entry's assignment tree to only those tasks scheduled to be worked on during the displayed week.

However, if required, an employee can still display and track time against a hidden task.

To track time against a hidden task:

From the time entry screen:

1. **Right click** in the assignment tree.
2. Select **Show All**. All hidden tasks will now appear in the assignment tree.
3. **Locate** and **check** ☑ one or more tasks to add to the timesheet grid.
4. Click the **Add to Timesheet** button.
5. **Track time** on the task as required.

Notes:

- Whether task assignments are hidden from users is determined by the manager using the **Only Display Scheduled Assignment** function.
- You can re-hide tasks by right clicking in the assignment tree and re-selecting Show All.

Offline Timesheet

You can enter or track time when disconnected from your network or from the internet by using the **Offline Timesheet** function.

While **working offline** in DOVICO Timesheet most time entry functions are available. However functionality not directly related to entering time is not available. This includes submitting time, expense entry, reporting and access to Options. Administrative functions are also not available while offline.

Note: You must be connected to the system database (online) before you can create your "offline" timesheet and go offline. That is, if you are already off-site (disconnected from your network) you can use your existing offline timesheet but you cannot create a new one.

Tip: For those users who are primarily only required to enter time and who keep forgetting to create an offline timesheet before they go off-site, one practice is to always use the offline timesheet and only re-establish a connection to the system database (go online) to submit time, report, enter expenses, etc.

Prerequisite:

- If your My Documents folder is located on a remote server, the Offline Timesheet requires that your computer be **configured to use "Offline Files"** so that your My Documents folder is available when you are not connected to your network. (see Offline Setup, page 256)

  How do I check this? Right click on any file or folder in your My Documents folder and select Properties. Select the General tab and find the "Location" field. If the location begins with \\ (double backslashes) then your My Documents folder is located on a remote server.

To go offline:

1. From the time entry screen, click the **Offline** button on the toolbar.
2. The following occurs:
   a. You are prompted to download a small file. Select **Open**, or save and open the file (TimesheetApplicationLauncher.exe).
   b. If your My Documents folder is located on a remoter server, you are **warned** about properly configuring your computer's offline files (see Prerequisite above).
   c. Data is synchronized between your computer and the database.
   d. The DOVICO Timesheet application closes.
   e. A small application is stored on your computer, and an icon is placed on your desktop and in your system tray.
   f. The Offline Timesheet application automatically launches.

Note: If the file (TimesheetApplicationLauncher.exe) is saved, it should be deleted after its first use.

Entering time while offline:

When **entering time** using the Offline Timesheet, all time entries (and time entry details) are stored on your computer's hard drive. Periodically, you should synchronize the Offline Timesheet to the system database to update your assignments, etc. However before you can submit your time, you must return to the online mode.

While offline you have access to a total of seventeen (17) weeks of timesheet data. These are; the week you went offline, eight (8) weeks prior and eight (8) weeks forward.

When you want to re-establish a connection to the DOVICO Timesheet system database (go online) you should use the **Online** button on the Offline Timesheet's toolbar. Going online through an alternate method (from a bookmark, a URL, a different computer, etc) could potentially cause conflicting time entries.

To permanently reconnect to the database (Online):

1. Click the **Online** button on the toolbar. When you reconnect to the database:
   - You are prompted to enter your password.
   - All time entries in the Offline Timesheet are copied and stored in the system database.
   - The offline time entries and desktop icon are removed from the computer.

To temporarily reconnect to the database (Sync):

1. Click the **Sync** button on the toolbar. When you synchronize to the database:
   - You are prompted to enter your password.
   - All time entries in the Offline Timesheet are copied and stored in the system database. **NOTE**: These time entries are not submitted.
   - All task assignments are updated.
   - Any rejected time entries are received.
   - All ETCs are sent to the database.
   - A new 17 week span of timesheet data is established based on the current week.
   - You are disconnected from the system database and return to offline mode.

Offline Setup Requirements

If your My Documents folder is located on a remote server, DOVICO Timesheet's Offline Timesheet requires that your computer be configured to use "Offline Files" so that your My Documents folder is available when you are not connected to your network.

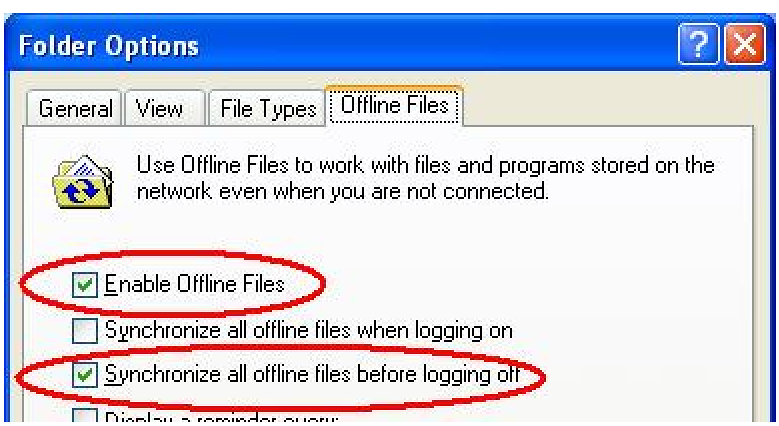
Note: To check if your My Documents folder is located on a remote server, right click on any file or folder in My Documents and select Properties. Select the General tab and find the Location field. If the location begins with \\ (double backslashes) then your My Documents is located on a remote server.

Warnings

- If Offline Files are not properly configured, time entered while working offline may be lost when you reconnect to the system database.
- Before disconnecting from a network, users should always synchronize their Offline Files. The instructions provided below will only synchronize the data when users log off their computers. Data protection cannot be assured if a user simply disconnects the network cable without first manually synchronizing or if a WAN connection is lost.

To setup Offline Files on your computer:

1. From your desktop, open your **My Documents** folder.
2. Select **Tools** / **Folder Options** from the menu.
3. Click the **Offline Files** tab.
4. Check both the **Enable Offline Files** and **Synchronize all offline files before logging off** boxes.
5. Click **OK**.



Offline Help

The following describes the peculiarities of having access to both an offline timesheet (on the desktop) and a direct link to go online (access the system database via the normal login screen) at the same time, and the proper way a user should reconnect to the system database (go online).

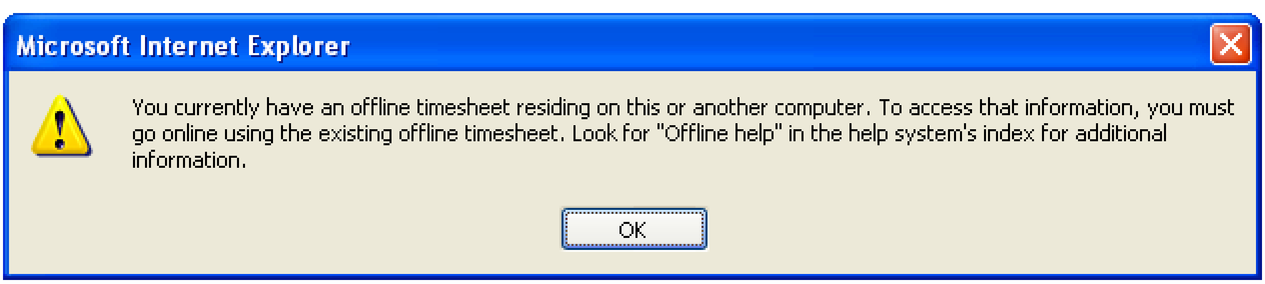
In a typical deployment, all time entries for all users are contained in one system database. However, with an offline timesheet, a user can have time entry data in 2 different locations; in the user's computer hard drive and in the system database. Therefore the possibility exists that a user could access the system database (go online) and enter time data which conflicts with time data the user has in the offline timesheet that has not be synchronized.

How to properly connect to the system database (go online)
After having established an offline timesheet on a computer, it is important that a user wanting to return to online operation establishes the connection by first launching the offline timesheet and then clicking the **Online** button  on the toolbar. This ensures that any data stored in the offline timesheet is copied to the system database thus preventing possible conflicting time entries.

Sample scenario:
A user closes the offline timesheet containing a week's worth of time entries without going back online (or synchronizing). By closing the application in this manner, this means that these time entries exist only on the user's computer. Now if this same user goes online using an alternate method (from a bookmark, a URL, a different computer, etc) instead of connecting via the Offline Timesheet's Online button, the user will not see that week's time entry data since these exist only on the user's computer hard drive.

This is one scenario showing why it is important that when users want to re-establish a connection to the DOVICO Timesheet system database (go online) they should use the **Online** button on the Offline Timesheet's toolbar. This is particularly important if a user creates an offline timesheet on a different or public computer. In these circumstances, the user should always return to online mode before leaving that computer.

If a user should go online while an Offline Timesheet exists anywhere, the following warning is displayed.



Expense Entry

Introduction to the Expense Entry screen

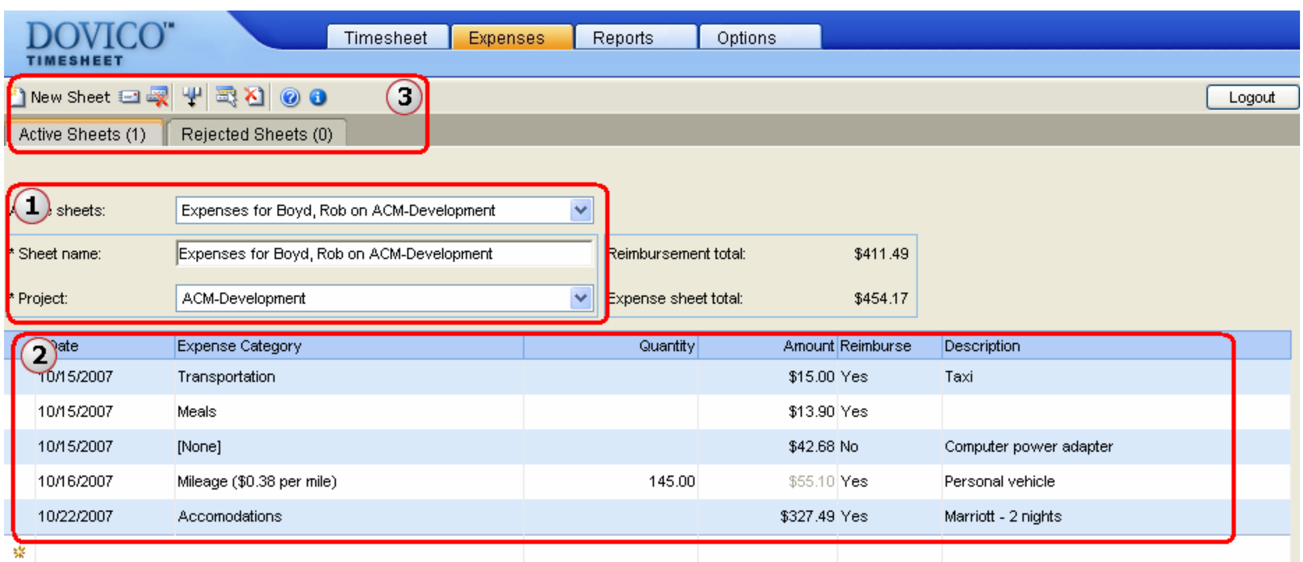
The Expense Entry screen (**Expenses**) contains 3 sections designed to assist you in entering and submitting expenses.

1 The **Expense Sheet Properties** area identifies the expense sheet displayed and permits the user to view other expense sheets.

2 The **Expense Entry Grid** area is where individual expenses and their details are entered.

3 The **Toolbar** displays buttons which carry out commands such as Create new sheet, Submit expenses, etc..

The **Tabs** are used to navigate between active and rejected expense sheets.



Expense Entry Toolbar

New Sheet	**Create a new sheet**: To create a new expense sheet.
	**Submit**: To submit an expense sheet to the database.
	**Delete selected rows**: To delete an expense entry (row) from the expense sheet grid.
	**Show / Hide Columns**: To personalize the expense entry grid by hiding or displaying certain columns.
	**Delete expense sheet**: To delete the entire expense sheet.
	**Move selected row**: To move an expense entry to a different expense sheet.
	**Help**: To launch the Help system.
	**About**: To display information on the software version.
Logout	**Logout**: To logout of DOVICO Timesheet.
Administration	**Return to Administrative views**: To access the administrative functions. The administrative functions are only available to those with suitable **software access** rights and **security level**.

Enter Expenses

The **Expenses** view allows you to enter and submit expenses for purchases or costs incurred against a project. Once submitted (and approved), expenses are saved in the database and are available for project cost reporting, analysis and billing.

In DOVICO Timesheet's expense entry screen, expenses are organized by sheets. Each expense must belong to a sheet and each sheet must be assigned to a project.

See page 261 for to learn how to enter mileage or other 'rate based' expenses.

To enter an expense:

1. Click the **Expenses tab** to access the Expense entry view.
2. Click the **Active Sheets** tab in the upper left corner.

If entering an expense for an **existing expense sheet**:

3a. Select the sheet from the **Active sheets** drop-down list and go to step 4.

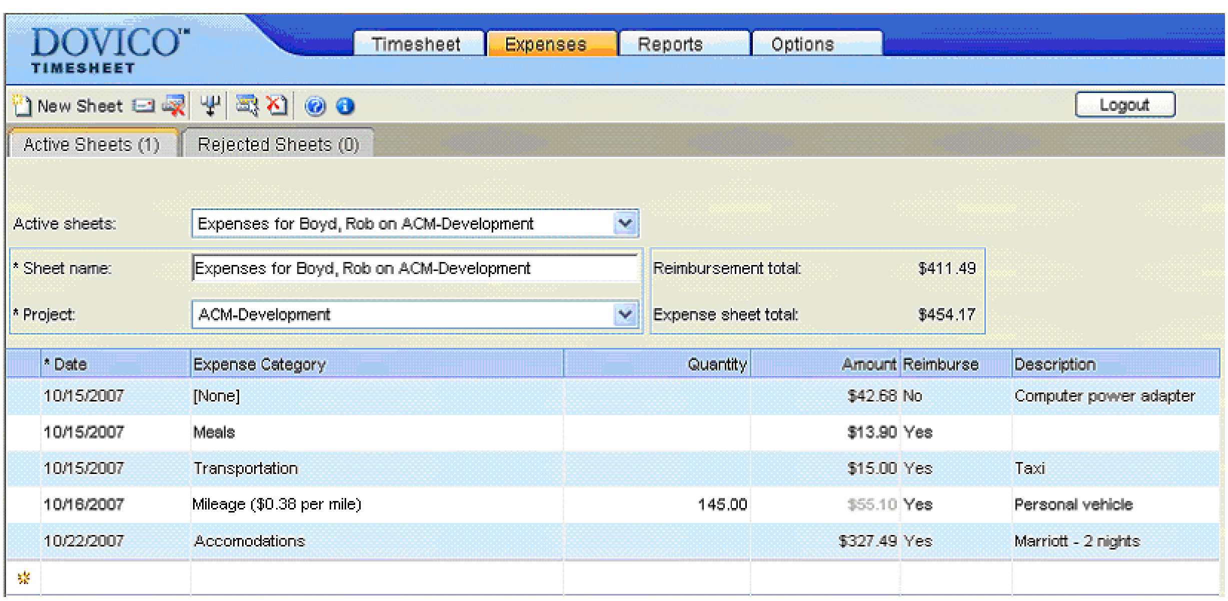
If entering an expense for a **new expense sheet**:

3a. Click the **New sheet** button on the toolbar to create the new sheet.

3b. (**Optional**) Modify the **Sheet name**.

> **Note**: By default, a newly created expense sheet has "Expenses for *Last Name*, *First Name* on *project*" as its name.
>
> When submitted, the following is added to the end of the sheet name: "*Last name*, *First name*, *From date*, *To date*" (e.g. Shelley, Mary from Monday, October 15, 2007 to Sunday, October 21, 2007).

3c. Select a **project** for this sheet from the Project drop-down list.



4. Click in the empty row (the row with the asterisk at the far left).

5. (**Optional**) Modify the expense **date** by clicking in the date cell and then clicking the calendar button.
6. (**Optional**) Select an **Expense Category** from the drop-down list.
7. Enter an **amount** for the expense. It's a good practice to enter the amount in your company's base currency. Click the **currency converter** button to convert the expense amount.
8. (**Optional**) Select if this expense is **reimbursable**.
9. (**Optional**) Enter a **description** for this expense (up to 4000 characters).

The following **optional columns** may appear within the expense entry grid. These fields can be displayed or hidden using the **Show / Hide column** button on the toolbar.

- Enter a **Reference** number.
- Enter a **Purchase Order** number.
- Select **Billable** if the expense is billable.
- Enter the **Markup Percentage** for the expense.
- Enter the **Fixed Amount** if necessary.
- Enter **Value Added Tax 1** and **Value Added Tax 2** information for your location if required.
- **Client Cost**: A non-editable field showing the client cost for the expense: (Amount x Markup %) + Fixed Amount.

Custom Fields: Any required custom fields created by your manager automatically appear in the grid. Non-required custom fields can be added to the grid using the Show/Hide column function.

Notes:

- The **Quantity** field is only available when a rate-based expense category is selected.
- The **Reimbursement total** displayed above the grid shows the total for the expense entries that have been checked as reimbursable within the sheet. The total does not include any markup, fixed costs or taxes for the expenses.
- The **Expense sheet total** displayed above the grid shows the total for all expense entries within the sheet. The total does not include any markup, fixed costs or taxes for the expenses.
- Expense entries having an **amount = 0** are displayed in the expense entry screen. If the expense entry is not billable, it will be removed from the expense sheet when the sheet is submitted for approval. If the expense entry is billable and a fixed cost is applied, the expense will be submitted.
- The Project drop-down list includes only those **projects** to which you are assigned.
- Custom Fields may be disabled depending on the expense category selected.
- The **date** and **currency formats** are based on the regional settings on the server or computer where DOVICO Timesheet is installed.

Tips:

- An expense can be **moved** to another sheet by selecting the expense row and clicking the **Move expense** button on the toolbar.
- **Delete an expense entry** by selecting the row and clicking the delete row button on the toolbar.
- **Delete the entire expense sheet** by clicking the delete sheet button on the toolbar.

Entering Mileage

The Expenses view allows you to enter mileage or other per unit or rate based expenses for purchases or costs incurred against a project.

Prerequisite:

- Rate based Expense Categories must be created before entering mileage type expenses.

To enter a rate based expense:

1. Click the **Expenses tab** to access the Expense entry view.
2. Click the **Active Sheets** tab in the upper left corner.

If entering an expense for an **existing expense sheet**:

3a. Select the sheet from the **Active sheets** drop-down list and go to step 4.

If entering an expense for a **new expense sheet**:

3a. Click the **New sheet** button on the toolbar.

3b. (**Optional**) Modify the **Sheet name**.

3c. Select a **project** for this sheet from the Project drop-down list.

4. Click in the empty row (the row with the asterisk at the far left).
5. (**Optional**) Modify the expense **date** by clicking in the date cell and then clicking the calendar button.
6. Click in the empty Expense Category cell displaying [None] and select a 'rate based' **Expense Category** from the drop-down list. Rate based expense categories are displayed with the unit cost value in parentheses. Example: Travel Mileage ($0.45 per mile).
7. Enter the number of units in the **Quantity** field.
8. (**Optional**) Select if this expense is **reimbursable**.
9. (**Optional**) Enter a **description** for this expense (up to 4000 characters).

Submitting Expenses

Periodically, as defined by your manager or system administrator, you must submit your expense entries for review, approval. Once submitted (and approved), expenses are saved in the database and are available for project cost reporting, analysis and billing.

The following describes how to submit expense sheets.

Warning: Once an expense sheet is submitted, it is no longer available for editing or available to add more expenses.

To submit an expense sheet:

1. Select the **sheet** to submit from either the Active or Rejected sheets drop-down lists.
2. Click the **Submit button** on the toolbar.

The sheet is removed from the Active sheets (or Rejected) drop-down list. Once a sheet is approved, it is no longer available for review in the expense entry screen. Sheets submitted and not yet approved (under review) are available for review through the **expense entry reports**.

Tip: Before submitting an expense sheet, you should print out a copy of the sheet using the **Expense Sheet Details report**.

Notes:

- Expenses are grouped by sheets only until the sheet is approved. Once approved, the sheet no longer exists and expenses are added to the database as individual entries.
- Sheets must be **submitted as a whole**. Individual expenses from within a sheet cannot be submitted.
- When expense sheets are submitted, the following is appended to the sheet name: "Last name, First name from, From date, To date" (e.g. Shelley, Mary from Monday, May 15, 2007 to Sunday, May 21, 2007).
- Expense sheet date ranges cannot be edited and are automatically calculated based upon the minimum and maximum expense entry dates within each sheet.

Edit rejected expenses

When a manager or administrator rejects expense entries, these are returned to you for editing and re-submission. The following explains how to determine if you have rejected expense entries, how to edit and re-submit those rejected expense entries.

To determine if you have rejected expense entries:

An exclamation icon is displayed within the **Expense tab** whenever one or more expense sheets have been rejected.

To edit a rejected expense:

1. Click the **Expenses tab**.
2. Click the **Rejected Sheets** tab near the top of the screen.
3. Select the rejected expense sheet from the **Rejected sheets** drop-down list.

The **reason for rejection** entered by the person who rejected the expense sheet appears on the screen.

4. **Edit** the expense entries as required:
   - **Modify** the data in one or more columns.
   - **Delete an entire row** by selecting the row and clicking the delete row button on the toolbar.
   - **Delete the entire sheet** by clicking the delete sheet button on the toolbar.
   - **Move an entire row** to a different sheet by selecting the row and clicking the **Move expense** button on the toolbar.

To re-submit an expense sheet:

1. Select the sheet to re-submit from the **Rejected sheets** drop-down list.
2. When all rejected expense entries for a sheet have been edited, click the **Submit** button on the toolbar.

Note: When an approving manager or administrator rejects an expense entry, the entire sheet is rejected. Individual entries are not identified and it is up to the approving manager to enter the appropriate level of details for the rejection.

Other functions

Show / Hide Expense Columns

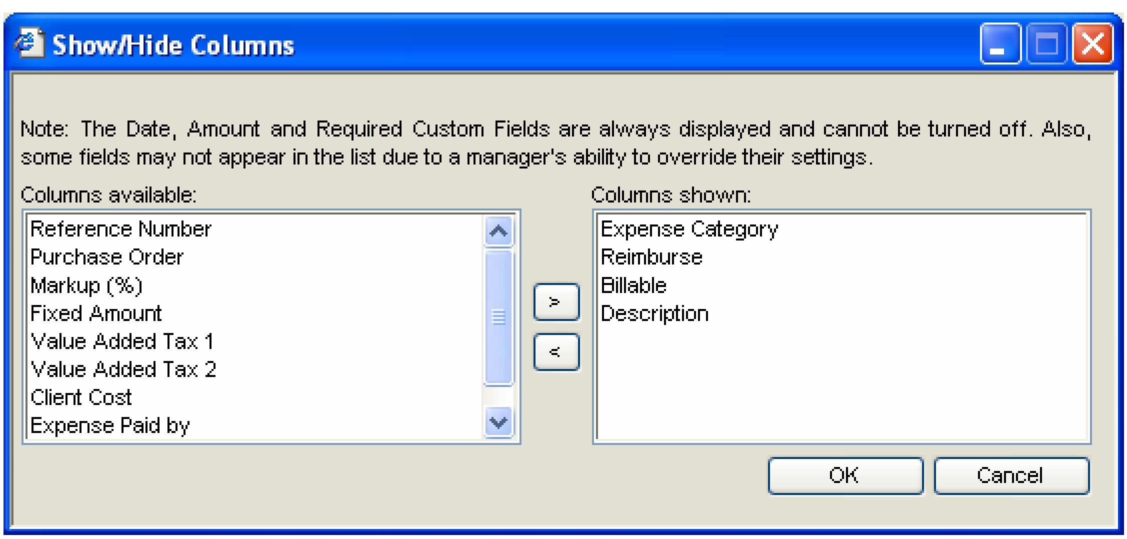
The Show/Hide columns function permits users to personalize the expense entry view by showing or hiding specific columns in the expense entry grid.

To hide a column:

1. Click the **Show / Hide Column** button located on the toolbar.
2. From the **Columns shown** list on the right, select the columns to hide and click the Remove button located between the lists.
3. Click **OK.**

To show a hidden column:

1. Click the **Show / Hide Column** button located on the toolbar.
2. From the **Columns available** list on the left, select the columns to show and click the Add button located between the lists.
3. Click **OK.**



Notes:

- The **Date** and **Amount** columns are required fields and cannot be hidden.
- The Quantity column is only displayed in the expense sheet grid if a rate-based expense category exists. The Quantity column cannot be hidden.
- Any **required Custom Field** cannot be hidden.
- **Show/Hide** functionality for some columns can be **disabled** or **overridden** by the manager or system administrator.
- The **order** in which columns are displayed cannot be modified.

Move an expense entry

The following describes how to move an un-submitted expense entry to a different expense sheet.

To move an expense entry to another expense sheet:

1. Click the **Expenses tab** to access the Expense entry view.
2. Click the **Active Sheets** (or **Rejected Sheets**) tab in the upper left corner.
3. Click anywhere on the **expense entry row** to be moved.
4. Click the **Move expense** button on the toolbar.
5. From the pop-up window, **select the sheet** where the expense is to be moved.
6. Click **OK**.

Date and Currency formats

The **date** and **currency** formats are based on the regional settings on the server or computer where DOVICO Timesheet is installed.

Time & Expense Entry Reporting

The **Reports** tab is used to display or print time and expense reports. See Default Reports at the end of these instructions for a brief description of each time and expense entry report.

To view a report:

1. Click the **Reports** tab located at the top of the screen.
2. Click on the **report name** or description.
3. To report on a specific date range, check the **Filter by Date Range** checkbox and modify the **From** and **To** dates by clicking the calendar icons. Or un-check the **Filter by Date Range** checkbox to report on all data.

4. Optionally modify on which **Entry Status** to report. By default, all options are selected.

   Approved: Time and expenses submitted and approved.
   Not Submitted: Time and expenses not submitted.
   Rejected: Time and expenses submitted and rejected.
   Under Review: Time and expenses submitted but not yet approved or rejected.

5. Click the **View Report** button near the bottom of the screen or click the preview button on the toolbar.

   An Adobe PDF formatted report is generated in a new window. To print or save the report, click the appropriate button on the PDF viewer's toolbar.

   The previewed report can be exported in either **Word**, **Excel**, **RTF** and **CSV** formats by selecting the appropriate **export report format** from the drop-down list at the top of the window and clicking the **Export** button.

Notes:

- The Date Range or Entry Status options are not available on all reports.
- **Pie chart** reports only show the 4 largest values as unique pieces within the pie chart. All additional values are grouped into a single piece labeled **Other**.

Default Reports

The following default reports are available to all time and expense entry view users. Reports can be removed or added by your system administrator or manager.

<u>Time Reports</u>

Time by Project: Actual hours by project

Time by Project and Task: Actual hours by project and task

Time by Project Chart: Pie chart of actual hours by project

Time by Project with Budget and Estimate to Complete: Budget and actual hours by project with estimate to complete

Time by Task: Actual hours by task

Time by Task Chart: Pie chart of actual hours by task

Time Entry Details: Actual hours by date, project and task

Vacation and Leave: Hours accrued, used and remaining by type of leave
** The Vacation and Leave report returns values from the Accrual Start date for each type of leave.

<u>Expense Reports</u>

Expense Sheet Details: Actual expenses by sheet

Expenses by Project and Category: Actual expenses by project and category

Expenses by Category: Actual expenses by category

Reporting toolbar

	**Print Preview**: To preview the selected report.
	**Help**: To launch the Help system.
	**About**: To display information on the software version.
Logout	**Logout**: To logout of DOVICO Timesheet.
Administration	**Return to Administrative views**: To access the administrative functions. The administrative functions are only available to those with suitable **software access** rights and **security level**.

Database Manager

A tool included in DOVICO Timesheet is Database Manager. This utility allows you to perform a variety of functions for any DOVICO Timesheet database:

Since Database Manager can only be accessed from the computer (or network server) where DOVICO Timesheet is installed, it provides additional security to ensure that non-authorized personnel cannot access critical database functions.

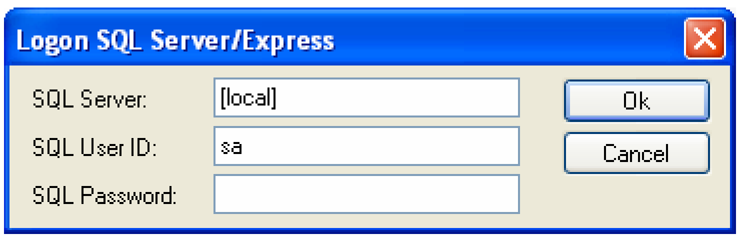
In Database Manager ...

Creating a new database

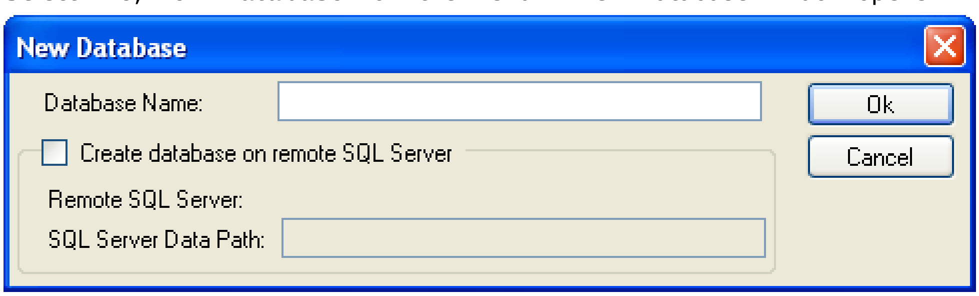
Use the New Database option to create a new DOVICO Timesheet database.

To create a new database:

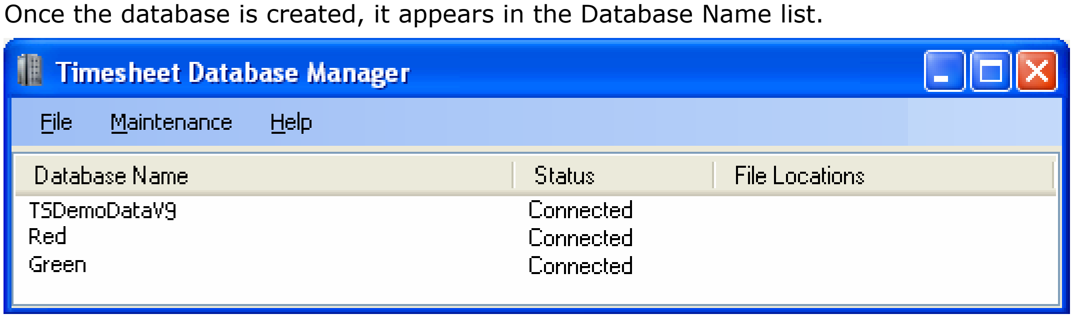
1. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager**. A logon window opens.



2. Enter your **SQL Password** and click **OK** to accept the settings for **SQL Server**, **SQL User ID** and **SQL Password** (see picture above) or enter the **SQL Server**, **SQL User ID** and **SQL Password** for the SQL Server to which you want to connect.
3. Select **File**, **New Database** from the menu. A New Database window opens.



4. Enter the name of the new database in the **Database Name** field. The new database will be created in the directory where DOVICO Timesheet is installed. This in normally in: \Program Files\DOVICO Software\DOVICO Timesheet\data.
5. If the SQL Server is not installed locally, then you will need to select the **Create database on remote SQL Server** option.
   - Once this option has been selected, you will need to specify the **SQL Server Data Path**. This is the directory path on the SQL Server where the database files (*.mdf and *.ldf) will be stored. This has to be a local path on the remote SQL server. **IMPORTANT**: This cannot be a UNC or Mapped Network Drive path.
6. Click **OK**.
7. Once the database is created, it appears in the Database Name list.



8. To open and use the new database, select the database from the database list on DOVICO Timesheet’s logon window. You may need to shutdown the Database Manager before the new database appears in the login screen.

Backing up a database

DOVICO Timesheet was designed using Microsoft SQL Server as the back-end server for database management. Use the Backup Database option to create a date-stamped .bak file.

Note: You can automate the backup process to run after hours using DOVICO Timesheet's Job Scheduler.

To backup a database:

1. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager**. A logon window opens.
2. Enter your **SQL Password** and click **OK** to accept the settings for **SQL Server**, **SQL User ID** and **SQL Password** or enter the **SQL Server**, **SQL User ID** and **SQL Password** for the SQL Server to which you want to connect.
3. Select the **database** to backup.
4. Select **Maintenance**, **Backup Database** from the menu.

   A date-stamped .bak file is created and placed in the same folder as the database's mdf and ldf files. This in normally in: \Program Files\DOVICO Software\DOVICO Timesheet\data

Archiving a database

Use the Archive Database option to create a copy of the entire database and to remove, from the source database, all items that have been flagged for archive. Archived databases can be opened anytime.

When the Archive Database option is used, DOVICO Timesheet Database Manager will:

- **Remove** items in the selected database flagged as archived (page 180).
- **Save** archived items to the archived database. If an employee is archived, it will also save timesheet entries for that employee.
- **Copy** all other information in the selected database to the archive. This enables you to see a perfect picture of the database at the date and time the Archive Database option was performed.

Before archiving a database, you can review all items flagged for archive by using the Items Flagged for Archive report in DOVICO Timesheet.

Warning: The Archiving process can take a considerable amount of time to execute because the process involves making a copy of the entire database. Archiving should be done during non-peak hours.

To archive a database:

1. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager**. A logon window opens.
2. Enter your **SQL Password** and click **OK** to accept the settings for **SQL Server**, **SQL User ID** and **SQL Password** or enter the **SQL Server**, **SQL User ID** and **SQL Password** for the SQL Server to which you want to connect.
3. Select the database to archive from the **Database Name** list.
4. Select **Maintenance**, **Archive Database** from the menu.

5. A message asking you if you are certain you want to archive the information is displayed. Click **Yes**.
6. Click **OK** to accept the archive database name. A new archive database is created and called the same name as the selected database with the word 'Archive' appended.
7. The archived database is available from DOVICO Timesheet's logon window list of databases. To prevent employees from login into the archive database, you can log into the database and change the Software Access field for those employees you wish to deny access.

Tip: To restore one or more individually archived records, search for 'DV1116' in DOVICO's Knowledge base (http://www.dovico.com/techtips.html) for an article detailing how this can be done.

Re-index a database

You can use the Re-index Database option as often as necessary. It ensures that your database is properly indexed, which in turn enables the application to run faster.

To re-index a database:

1. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager**. A logon window opens.
2. Enter your **SQL Password** and click **OK** to accept the settings for **SQL Server**, **SQL User ID** and **SQL Password** or enter the **SQL Server**, **SQL User ID** and **SQL Password** for the SQL Server to which you want to connect.
3. Select the database to re-index.
4. Select **Maintenance**, **Reindex Database** from the menu.
5. Once the re-index is complete, a message window appears, click **OK**.

Restoring a database

DOVICO Timesheet was designed using Microsoft SQL Server as the back-end server for database management. Should the server computer crash and lose all information, you can restore the database backup file (.bak) using this option.

To restore a database:

1. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager**. A logon window opens.
2. Enter your **SQL Password** and click **OK** to accept the settings for **SQL Server**, **SQL User ID** and **SQL Password** or enter the **SQL Server**, **SQL User ID** and **SQL Password** for the SQL Server to which you want to connect.
3. Select **Maintenance**, **Restore Database** from the menu.
4. Enter the database name in the **Name** field.
5. **Browse** to the database's backup file location, select the **.bak** file and click **Open**.
6. Click **OK**.
7. Click **Yes** to confirm the action.

The database will be restored to Program Files\DOVICO Software\DOVICO Timesheet\Data\

Deleting a database

Use the Delete Database option to delete a DOVICO Timesheet database.

Warning: This operation cannot be reversed. Once a database is deleted, it cannot be recovered.

To delete a database:

1. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager**. A logon window opens.
2. Enter your **SQL Password** and click **OK** to accept the settings for **SQL Server**, **SQL User ID** and **SQL Password** or enter the **SQL Server**, **SQL User ID** and **SQL Password** for the SQL Server to which you want to connect.
3. Select the database to delete.
4. Select **File**, **Delete Database** from the menu.
5. A message is displayed asking you to confirm the action. Click **Yes** to delete the database.

Other functions

Attaching a database

Use the Attach a Database option to add an existing database using that database's mdf and ldf files.

To attach a database:

1. From Windows, navigate to DOVICO Timesheet's data folder. (By default this is in: \Program Files\DOVICO Software\DOVICO Timesheet\Data)
2. Create a **new folder** and label it using the database's name. The database name cannot contain spaces or any special characters.
3. **Copy** the database's mdf and ldf files to the newly created folder.
4. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager**. A logon window opens.
5. Enter your **SQL Password** and click **OK** to accept the settings for **SQL Server**, **SQL User ID** and **SQL Password** or enter the **SQL Server**, **SQL User ID** and **SQL Password** for the SQL Server to which you want to connect.
6. Select **Maintenance**, **Attach Database**.
7. Enter the **Database name**.
8. Browse to the database's **mdf** file location, select the file and click **Open**.
9. Browse to the database's **ldf** file location, select the file and click **Open**.
10. Click **OK**. The database will only appear in the login's list of databases after the Database Manager is closed.

Synchronize database.config

The Synchronize Database.config option is a utility which automatically repairs the database.config file so that it contains only valid Timesheet databases located on the SQL Server.

Warning: This option should only be used under recommendation from DOVICO Support.

To synchronize the database.config file:

1. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager**. A logon window opens.
2. Enter your **SQL Password** and click **OK** to accept the settings for **SQL Server**, **SQL User ID** and **SQL Password** or enter the **SQL Server**, **SQL User ID** and **SQL Password** for the SQL Server to which you want to connect.
3. Select **Maintenance**, **Synchronize database.config**.
4. Confirm the synchronization operation by clicking **Yes** on the Warning message.

Note: If the order of databases appearing in the application's login page has been manually edited, then using this option will revert the order to alphabetical.

Moving a database

Use the Move Database instructions to move an existing database to a different computer or server.

Step 1 - Backup the database:

1. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager**. A logon window opens.
2. Enter your **SQL Password** and click **OK** to accept the settings for **SQL Server**, **SQL User ID** and **SQL Password** or enter the **SQL Server**, **SQL User ID** and **SQL Password** for the SQL Server to which you want to connect.
3. Select the **database** to backup.
4. Select **Maintenance**, **Backup Database** from the menu.

   A date-stamped .bak file is created and placed in the same folder as the database's mdf and ldf files. This is normally in: \Program Files\DOVICO Software\DOVICO Timesheet\data

Step 2 - Copy and move the .bak file to a folder on the network:

1. Use Windows Explorer to **copy** the .bak file created in Step 1. **Paste** the file to a safe location on your network or a backup server.

Step 3 - Restore the database:

Once DOVICO Timesheet has been successfully installed on the new server:

1. Logon to **Timesheet Database Manager**.
2. From Database Manager, select **Maintenance**, **Restore Database** from the menu. The **File Open** window opens.
3. Enter the database name in the **Name** field.
4. **Browse** to the database's backup file location, select the **.bak** file and click **Open**.
5. Click **OK**. The database will be restored to: Program Files\DOVICO Software\DOVICO Timesheet\Data\

Renaming a database

To rename the DOVICO Timesheet database:

*The database must be on the same server as SQL Server.

1. From the server location where DOVICO Timesheet is installed, stop the SQL Server. Right click on the MSSQL server icon in the system tray and select **Stop** (or from your **Start** menu, locate and run the **Service Manager** and select **Stop**).
2. Navigate to the data folder holding the databases. (By default this is in: \Program Files\DOVICO Software\DOVICO Timesheet\Data)
3. Create a new folder and label it using the database's new name. The new database name cannot contain spaces or any special characters.
4. Copy the source **mdf** and **ldf** files to the new folder.
5. Re-start the SQL Server. **Right click** on the MSSQL Server icon in the system tray and select **Start**.
6. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager**.
7. Enter your **SQL Password** and click **OK** to accept the settings for **SQL Server**, **SQL User ID** and **SQL Password** or enter the **SQL Server**, **SQL User ID** and **SQL Password** for the SQL Server to which you want to connect.
8. Select **Maintenance**, **Attach Database**.
9. Enter the new **Database name**.
10. Browse to the new location for the database's **mdf** file, select the file and click **Open**.
11. Browse to the new location for the database's **ldf** file, select the file and click **Open**.
12. Click **OK**.
13. **Exit** Database Manager.
14. Start **DOVICO Timesheet** and select the database from the available list.

    Note: You may want to delete the old database.

Modify Database Login

This option is used to change the SQL User ID and Password that DOVICO Timesheet uses to access SQL Server. This does not change the User ID and Password in SQL Server, it simply allows you to enter the login information that DOVICO Timesheet needs to access SQL Server.

To modify database login:

1. Select **Maintenance**, **Modify Database Login**.
2. Enter the **SQL User ID** that is used to access SQL Server.
3. Enter the **SQL Password** that is used to access SQL Server.
4. Enter the Password again in the **SQL Confirm Password** field to confirm that it has been entered correctly.
5. Select **OK**.

Modify "sa" password

This option is used to change the current "sa" account password required to logon to Database Manager.

Warnings:

- Modifying the "sa" account password could affect other applications connecting to your SQL Server.
- If you forget this password, you will have to re-install SQL Express/SQL Server.

To modify sa password:

1. From Windows, select **Start**, **All Programs**, **DOVICO Timesheet**, **Timesheet Database Manager** and logon to the Database Manager.
2. Select **Maintenance**, **Modify "sa" password**.
3. Enter the **Current** sa password.
4. Enter the **New** password.
5. Enter the Password again in the **Confirm new password** field to confirm that it has been entered correctly.
6. Select **OK**.

Contact DOVICO

Sales

Please contact our helpful sales personnel who will gladly assist you with your order or discuss your requirements.

By Telephone:
Sales - North American toll free number: 1-800-618-8463
Sales - International toll free number: +800 4618 8463

Through the Internet:
http://www.dovico.com or by e-mail at sales@dovico.com

By Fax:
Sales Fax North America: 1-506-384-0727
Sales Fax United Kingdom: +44 (0) 1625 429888

Technical Support

Since DOVICO follows CMMI® guidelines for quality assurance, we are sure that your experience with our software has been positive. Should you require technical assistance, then please be assured that DOVICO always has technical assistance just a few steps away. Please choose the most convenient way for you to contact us.

Through the Internet:
Search our up-to-date support information at: http://www.dovico.com/techtips.html
Request technical support at http://www.dovico.com/support.html or e-mail support@dovico.com.
Note: All support e-mail requests will be answered within 1 business day.

By Telephone:
North America: 1-800-618-8463
International: +800 4618 8463
Direct: 1-506-855-4477

Glossary

A

Accrual Rules: One or more sets of instructions which determine how much, and how fast, employees can accrue vacation, sick leave, and other leave.

Active Directory: A Windows network architecture permitting organizations to share and manage information about network resources and users.

Actual Client Cost: Actual Client cost is the calculated amount used for billing clients (or charge back) for tasks or projects.

Actual Company Cost: Actual company cost is the calculated amount used to determine your company's cost to accomplish a task or project.

Actual Expenses: Actual Expenses are the approved expenses entered by employees using the Expense entry tool or by managers using the Actual Expenses view

Actual Hours: Actual hours are the submitted and approved hours entered by employees using the Timesheet tool

Approval Workflows: Approval Workflows establish which manager must approve an employee's time or expense submissions before those entries can be processed for project costs, billing, payroll, reports, etc.

Approving Manager: An Approving Manager is an individual designated to approve time/expenses submitted by employees

ASP: Application Service Provider: A third-party entity that manages and distributes software-based services and solutions to customers across a wide area network from a central data center. (from webopedia.com)

Assignment: Assignments are the unique links between projects, tasks, and employees that define how a project is organized for time entry. Assignments establish who works on what and are required before employees can begin to track their time on projects and tasks.

Audit Trail: A log of additions, changes or deletions to numerous types of records in the database.

B

Billable Time: Billable time is a time entry which has been designated by the employee or manager as time entry which is made available for invoicing clients.

Budgeted Client Cost: Budgeted/Estimated client cost is the calculated amount used for billing clients (or for charge back) for tasks or projects.

Budgeted Company Cost: Budgeted/Estimated company cost is the calculated amount used to determine your company's estimated cost to accomplish a task or project.

Budgeted Hours: The budgeted/estimated hours required to accomplish a task or project

C

Client: Clients are companies, business units, or individuals for whom work is performed.

Client Cost: See Actual Client cost

Company Cost: See Actual Company Cost

Cost per Unit: The Cost per Unit is a value assigned to an Expense Category specifically created to track rate based expenses such as Mileage.

Custom Field: Additional data entry fields used to enter or track extra information.

E

Employee: Employees are those individuals who track time and expenses. Employees are also those who setup, manage, monitor or report on project activities.

Estimated Client Cost: Budgeted/Estimated client cost is the calculated amount used for billing clients (or for charge back) for tasks or projects.

Estimated Company Cost: Budgeted/Estimated company cost is the calculated amount used to determine your company's estimated cost to accomplish a task or project.

ETC: The ETC (Estimate to Complete) is an optional data field used by employees to enter how many hours they estimate are required to complete the task.

Expense Unit Cost: An Expense Unit Cost is a value assigned to an Expense Category specifically created to track rate based expenses such as Mileage.

F

Flag for Archive: An option available for most items allowing that item to be removed from the live database and stored in an archive database.

I

Items List: A tab within the Project Workspace view which displays Clients, Projects, Employees, etc in a grid-type view.

J

Job Scheduler: Job Scheduler is a job automation tool. It gives the user the ability to automate functions such as sending reports and notices, or maintaining the database.

L

Leave/Absence Rule: A combination of accrual rules establishing the policies that determine how much, and how fast, employees can accrue vacation, sick leave, and other leave.

Limited Access: A subset of security options applied to certain views which limit the viewer to only those items (projects, tasks, task groups, teams, etc) for which they are the designated 'manager'.

M

Microsoft Project: A project management tool created by Microsoft to help track and analyze projects and the impact of changes made to the schedule.

N

Non-Billable Time: Billable time is a time entry which has NOT been designated by the employee or manager as time entry available for invoicing clients.

O

OT charge prorating: An overtime multiplier assigned to the employee's rate charged value.

OT wage prorating: An overtime multiplier assigned to the employee's rate of wages value.

Overtime Rates: An Overtime Rates is a prorating (multiplier) assigned to employee Rate of Wages and Rate Charged hourly rates (pay and charge out rates) and is used to client or company costs.

P

Project: Projects are the combined endeavors undertaken to create a unique product, service or result.

Project Alerts: A DOVICO Timesheet mechanism allowing a project manager to set specific time, cost or expense targets for projects, and automatically receive notices by e-mail when targets have been attained.

Project Approvals: Project Approval is a mechanism allowing a manager or system administrator to create approval workflows that are project specific.

Project Workspace: A section of the software containing all the necessary views and functions to setup and manage your projects and project budgets.

Prorating: Proratings are variables (multipliers) assigned to tasks and overtime rates used in calculating client costs.

Q

Quick Assign: A bulk workload tool permitting user to efficiently create a large number of assignments

QuickBooks: A Business Accounting software used by small to mid sized companies

R

Rate Charged: A rate assigned to employees used to calculate client costs (billing rate).

Rate of Wages: A rate assigned to employees used to calculate company costs (pay rate).

Rates: Rates are the hourly pay and billing rates assigned to employees. Rates are multiplied by employee hours to calculate client and company costs.

Regions: Regions are used to establish specific tax rates on labor and expenses for each region or place of business (country, state, province, county).

Run Time: The day and time that a notification or reporting job, created in the Job Scheduler, is scheduled to be run.

S

SAAS: A software delivery method that provides access to software and its functions remotely as a Web-based service. (from webopedia.com)

SMTP: Simple Mail Transfer Protocol, a protocol for sending e-mail messages between servers. (from webopedia.com)

T

Task Assignment: See Assignments

Task Prorating: See Prorating

Tasks: Tasks are activities or work efforts against which employees track their time. Tasks are fundamental components required for time tracking.

W

WBS: Work Breakdown Structure: The hierarchy of tasks as identified by a series of numbers, letters, or both.

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