

Dovico Planning & Timesheet version 13

USER'S GUIDE

Dovico Planning & Timesheet User's Guide

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Welcome to Dovico Planning & Timesheet

Dovico Planning & 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 Planning & 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 Planning & Timesheet is a solution that will suit your complexity and requirements:

- Time tracking and costing for project management
- Project scheduling based on resource availability
- Time and expense entry for billing
- Time management metrics
- Time and attendance

What's New

Version 4 of Dovico Planning & Timesheet includes new powerful and useful features to help make the software a more effective and efficient business tool. With both 'ease of use' and 'listening to clients' as factors in our design and feature selections, 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 Planning & Timesheet (going from version 3 to 4)

Reporting

The redesigned reporting tool not only allows users to find, organize and print reports with ease, but it also provides users with the ability to modify reports or to create new reports from scratch. You have the ability to modify which columns are displayed, how the data is grouped and modify which report filters are displayed to the users who run the report. You can even add your own logo to all the reports. For the more adventurous users, you can add your own column to a report that uses a formula that you define. For the advanced report writers, we've added the ability to import your own SQL views so that you can create your own custom report types.

Because we made it so easy to modify reports, you'll notice that we significantly reduced the number of default reports since many of these we're only slight variations of other reports. Gone are all those report folders and subfolders. All reports are now listed in a single grid with sortable column headers and search functions. And with just one click you can tag any report as a favorite.

We've also made back-end changes that will greatly improve the speed at which a report appears after you've clicked the Run Report button.

Fixed Cost projects

For those who bill projects using the Fixed Costs option, you now have the ability to add multiple fixed costs to each project with each cost having its own start/end date and description.

Print options in Project Planning

We added two new reports that can be quickly launched from the Project Planning toolbar. From the Project Scheduling tab, you can get a printout of the Gantt view. You can also print your resource utilization chart from the Resource Utilization tab.

Dovico Planning & Timesheet Overview

Once everything is setup, **all users** enter time on a daily or weekly basis using the time entry screen. Those users designated as **managers** use the administrative functions on a daily, weekly or monthly basis to monitor and report on projects (by employee, team, client, project, task, etc.).

The first step is to enter basic information into the database. These are the clients, projects, tasks, employees, budgets, etc., that comprise the core structure for your projects and their work assignments. Only after this is done are employees able to enter time against the specific projects and tasks assigned to them either while working (timer) or at the end of the day or week (bulk entry).

Once time entry is under way, managers and empowered employees use Dovico Planning & Timesheet to manage and monitor activities within projects.

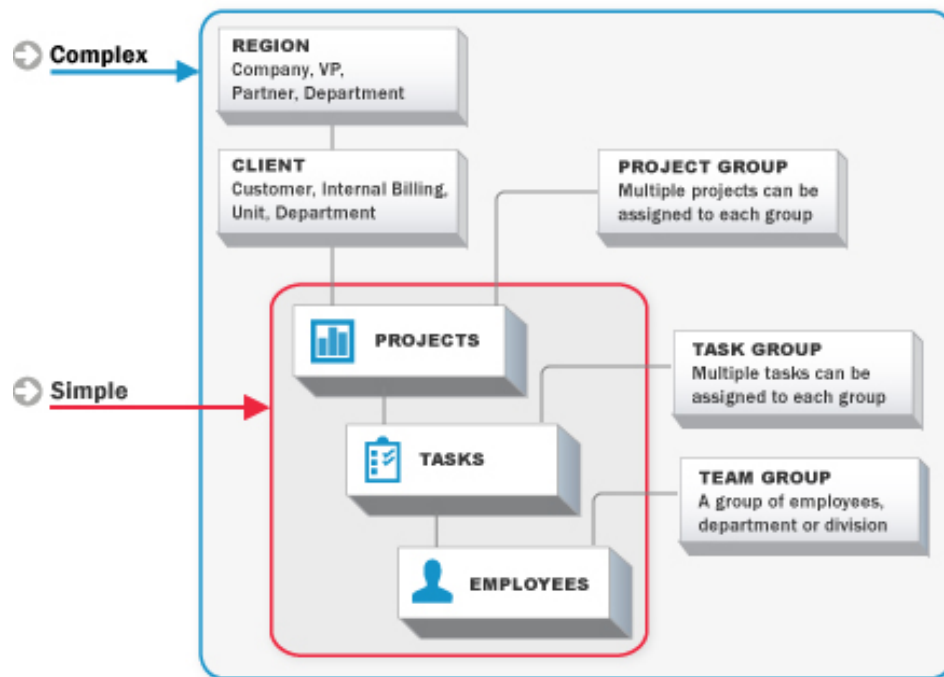
Dovico Planning & Timesheet can also synchronize with Microsoft Project to transmit time and other relevant information to Microsoft Project.

Dovico Planning & Timesheet can connect to QuickBooks. This permits employee timesheet and expense information to be synchronized with QuickBooks for accurate billing or reimbursement purposes.



Information Hierarchy

The software uses the following information hierarchy. Employees enter their time against tasks, and these hours are rolled-up to each level of information (task group, project, project group and client).




System Requirements

For all users




Workstation (End-User) requirements

- A computer using an HTML web browser (optimized for Internet Explorer 10 or greater)
 - Internet Explorer 10 or higher, Firefox (latest version), Chrome (latest version), or Safari 5 or higher for Mac/iOS
 - Require Internet Explorer for ActiveX controls if using the Microsoft Project Link.
 - Microsoft Silverlight version 4 or higher (when using the Project Planning tool)
 - JavaScript and cookies enabled
 - Pop-up blockers disabled or have the Dovico site flagged as safe in the pop-up blocker's settings
- Network/Internet connectivity
- Adobe Reader version 5.1 or above or a compatible PDF viewer

Using the Help system

Dovico Planning & Timesheet's comprehensive 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 word or term. For example, users can search for 'ETC' and every topic containing 'ETC' is listed at the Search tab. Click any topic from the list to see that topic.

Additional information is available from:

Customer Resources: <http://www.dovico.com/support.aspx>

Developer information: http://www.dovico.com/time_keeping_software.aspx

Support Online: <http://www.dovico.com/support.aspx>

On Demand Training

Quickly learn how to enter time and expenses using our free On Demand training accessible from our Customer Resource page at: http://www.dovico.com/training_resources.aspx. Or click the **Training videos** button from the login page.

Date, Time and Currency formats

The **date** and **currency** formats displayed in the software are based on regional settings. If Currencies are enabled, these are set for each user at their individual regional setting option (page 294). If not enabled, the regional setting is based on the Database Options setting (page 210).

The **time** format can vary depending on the view or tool accessed.

The time format in **Administrative views** is always the 24 hour clock format.

The **Start/End time** format used for the **end user time entry tool** can be configured to either the 24 hour clock format (e.g. 13:30) or the 12 hour AM/PM 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.

Login

Contact your Timesheet administrator to obtain your login credentials.

To login to Dovico:

1. Launch your web browser (Internet Explorer, Chrome, Firefox or Safari).
2. Go to <https://login.dovico.com>
3. Enter the database name in the **Company** field.
4. Enter the **User ID**.
5. Enter the **Password** (case sensitive).
6. Click **Login**.


The **'I forgot my password'** option sends a new password to the e-mail address stored in the user's profile. A user can later change the password from the time entry tool's Options tab - if enabled. This feature does not work if the employee's profile is synchronized with Active Directory.

Licenses

One license is required for each employee actively using Dovico Planning & Timesheet.

Employees no longer using the software can remain in the database without requiring 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** button  on the toolbar. The number of licenses purchased and the number of licenses being used are displayed in the pop-up window.

You can transfer a license from one employee to another employee, or you can purchase additional licenses.

North American toll free number: 1-800-618-8463



International toll free number: 00 800-4618-8463

To free up a license:

1. Select **Project Assignments** the menu (Menu > Views tab > Employees & Projects > Project Assignments).
Verify that the **Employees tab** is selected in the employee list pane at the right.
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. (**Optional**) Change the employee's **End date** to the current date or earlier. By doing this, the employee will be categorized as inactive for some reporting filters.
6. Click **Done**.

To transfer a license from one employee to another:

1. From the Project Assignments view, select the **Employee** 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 who will now be using the software.
6. Click the **Properties** button .
7. Select the appropriate **Software access** option for this employee (Time & Expense Entry tools or All).
8. Click **Done**.

Administrative Functions

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

For employees who only required to **enter time** and **expenses**, instructions begin on page [276](#).

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

In Administrative Functions...

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Projects and Assignments

In Dovico Planning & 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 steps are required to be completed. These are creating the projects, tasks, employees and then creating assignments.



Simplified assignment structure

Projects, tasks and their employee assignments can be created in 2 distinct areas within the software. They can be created from (1) the Project Planning tool or they can be created using (2) the Project Assignments view. Where you choose to create your project depends on the type of project and its need to be accurately scheduled.

You create a project using the **Project Assignments view** if the project does not need a schedule or a detailed plan. These are normally administrative tasks that are 'Support' or 'Administrative' type work, where it is important to **keep track of time and costs**, but not necessary to schedule and plan the work. It's important to note that if the need arises, you can always convert a project created in the Project Assignments view into a Project Planning tool project.

You create a project using the **Project Planning tool** if you have to accurately plan a project's schedule based on available resources, or to determine if you have the resources available to undertake a project, and to make it profitable. You also use the Project Planning tool for projects that require accurate tracking against budgeted time and costs while the project is in progress.

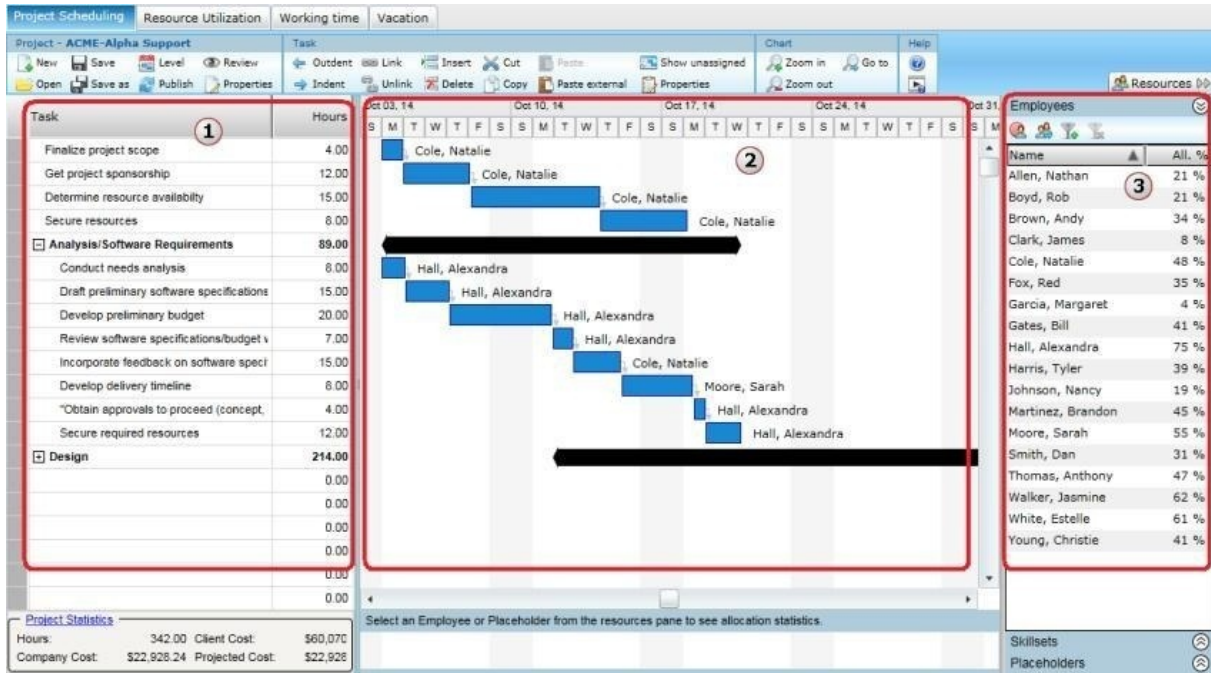
Where do I create my project?

Project Assignments view	Project Planning
<p>It is administrative-type work where the employees perform their tasks as the needs arises</p> <p>Examples: administration, accounting, customer support, production work</p> <p>The project does not need to have its work scheduled by day or in a defined timeline</p> <p>The work does not have an end date or set number of hours</p> <p>The work is not actively managed against budgeted time or budgeted costs</p>	<p>To schedule the work based on employees' existing workload</p> <p>To determine if you have the resources to take on the project</p> <p>To find out the likely end date for the project based on the resources available</p> <p>To run 'what-if' scenarios while planning the project to determine the most profitable schedule</p> <p>To estimate how much the project will cost</p> <p>To track the project's progress against its schedule and budget</p>
<p>Use the Project Assignments view page 49</p>	<p>Use the Project Planning tool page 12</p>

Project Planning - Overview

The Project Planning tool is designed to plan a project's work, timeline and costs based on when resources are available. Using the Project Planning tool to build a project plan can help answer the following types of questions:

- Do we have the resources to take on a project?
- How long will the project take to complete based on available resources?
- How much will the project cost us?
- How is a project tracking against its budget?



In Project Planning ...

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Before adding real projects for the first time.	21
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Understanding the basics

Introduction to the Project Planning screen

The Project Planning's **Project Scheduling** view is used to create the project, its tasks and resource assignments.

The Project Planning tool is accessed via the menu (Menu > Views tab > Project Planning).

- 1 The **Task** pane is where a project's tasks and budgeted hours are entered.
- 2 The **Gantt** area shows the task's scheduled duration and employee assignments.
- 3 The **Resources** pane is used to assign employees or skillsets to a project's tasks. If you need to add an employee, this is done using the Project Assignments view.

The screenshot displays the Project Planning software interface. The main window is titled "Project - ACME-Alpha Support" and shows the "Project Scheduling" view. The interface is divided into three main panes:

- Task Pane (1):** A table listing tasks and their budgeted hours. The tasks are:

Task	Hours
Finalize project scope	4.00
Get project sponsorship	12.00
Determine resource availability	15.00
Secure resources	8.00
Analysis/Software Requirements	89.00
Conduct needs analysis	8.00
Draft preliminary software specifications	15.00
Develop preliminary budget	20.00
Review software specifications/budget v	7.00
Incorporate feedback on software speci	15.00
Develop delivery timeline	8.00
*Obtain approvals to proceed (concept,	4.00
Secure required resources	12.00
Design	214.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
- Gantt Chart (2):** A visual representation of the project schedule. It shows tasks as horizontal bars with colored segments representing resource assignments. For example, "Finalize project scope" is assigned to Cole, Natalie. "Conduct needs analysis" is assigned to Hall, Alexandra. "Draft preliminary software specifications" is assigned to Hall, Alexandra. "Develop preliminary budget" is assigned to Hall, Alexandra. "Review software specifications/budget v" is assigned to Hall, Alexandra. "Incorporate feedback on software speci" is assigned to Cole, Natalie. "Develop delivery timeline" is assigned to Moore, Sarah. "Obtain approvals to proceed (concept," is assigned to Hall, Alexandra. "Secure required resources" is assigned to Hall, Alexandra. The "Design" task is represented by a long black bar, indicating it is not yet fully defined.
- Resources Pane (3):** A list of employees and their allocation percentages. The list is as follows:


Name	All. %
Allen, Nathan	21 %
Boyd, Rob	21 %
Brown, Andy	34 %
Clark, James	8 %
Cole, Natalie	48 %
Fox, Red	35 %
Garcia, Margaret	4 %
Gates, Bill	41 %
Hall, Alexandra	75 %
Harris, Tyler	39 %
Johnson, Nancy	19 %
Martinez, Brandon	45 %
Moore, Sarah	55 %
Smith, Dan	31 %
Thomas, Anthony	47 %
Walker, Jasmine	62 %
White, Estelle	61 %
Young, Christie	41 %


At the bottom of the interface, there is a "Project Statistics" section with the following data:


Hours:	342.00	Client Cost:	\$60,070
Company Cost:	\$22,928.24	Projected Cost:	\$22,928

Starting a New Project

To start/open a new project:

1. Click the **New**  button on the toolbar.
2. **(Optional)** Assign the project to a client. You do not need to assign a client to a project if your company does not bill clients or does not charge back to business units. You can assign the project to a client at any time.
3. Adjust the project's **start date**. By default, today's date is selected.
4. **(Optional)** Establish another person as the **Manager** (for reporting purposes only).
5. If enabled, select a **currency** and **budget exchange rate date** for the project (page 46).

Note that these options can also be modified using the Project properties button  on the toolbar.

Save : Saving a project saves the assignments and other scheduling changes or additions made to the project. New projects, or changes to an existing project, only become available for time entry and tracking when the project is published.


Adding Tasks and Estimates

The following only briefly describes how to add tasks and budgeted hours for a project. The following also highlights how to create dependencies and summary tasks. Full details on tasks and their properties are located in All about Tasks on page 24.

Quickly Add a Task:

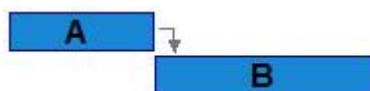
1. In the **Task** column on the left, click in an empty cell and enter the task name. The name should be clear and concise enough for the employees tracking time against the task. You can later add a full description to better detail the task (see Complete Task Properties in All About Tasks page 24).
2. In the **Hours** column, enter the budgeted number of hours required to complete the task. By default, 8 hours is entered for each task added.

Tip: Try to enter your tasks in the same order that they will be worked.

After entering budgeted hours for a new task, a small link icon  may appear next to the hours. You have the option to use this link to quickly create a dependency between this new task and the task above it.


Linking Tasks / Creating Dependencies

The Project Planning tool uses one type of link dependency: **Finish to Start**. A Finish to Start dependency should be set when a task (the predecessor) must be finished before another task can start (the successor). The Project Planning tool uses the project's budgeted hours for tasks and their dependencies to determine the project's scheduled finish date.




Task A must be finished before Task B can start.

1. Click on the **predecessor task** (Task A) - the task that must finish before the other task can start.

2. While holding the **Ctrl** key, select the **successor task** (Task B) - the task that cannot start before the other is finished.
3. Click the **Link** button  on the toolbar; or right click and select Link.

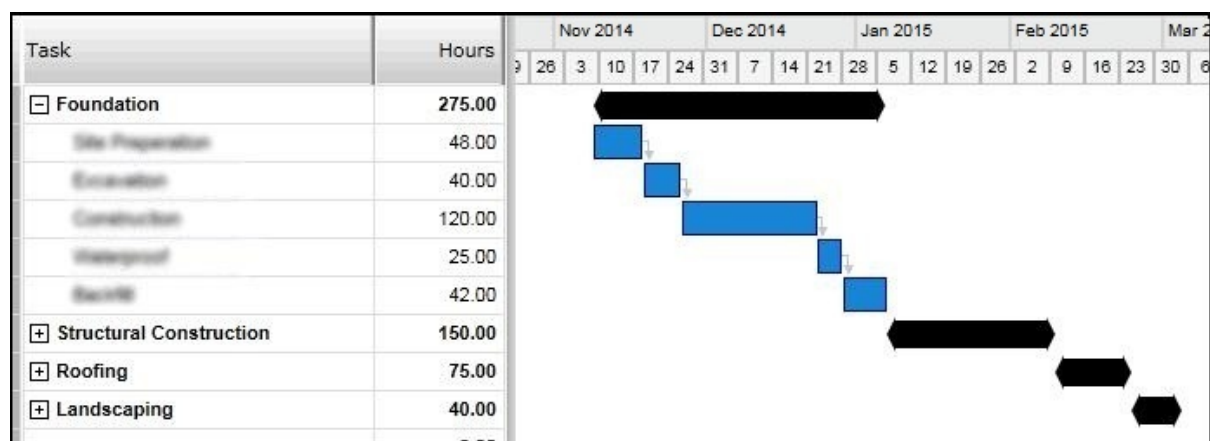
The dependency is displayed in the Gantt area as a thin line connecting the tasks.

Use the **Unlink** toolbar button  to remove a dependency.



See All About Tasks (page 24) for more information on dependencies.

Summary Tasks

For larger projects, you can create summary tasks to better group adjacent tasks that have common characteristics or have a logical grouping, and that are scheduled in the same time frame. Summary tasks can be interpreted as project phases or milestones. Creating summary tasks can also help reduce the visual clutter and make the Gantt area more readable.



The following instructions assume that the summary task has not yet been added.

1. Click on the **top most task** you want to group together.
2. Click the **Insert** toolbar button . This creates the location for the summary task (above the task selected in step 1).
3. Enter a name for the summary task. There is no need to enter hours for summary tasks since the sum of the sub-tasks' hours will be displayed in the Hours column.
4. Select **the tasks** to include in the summary task. The selected tasks must be immediately below the summary task and must be consecutive. TIP: With the first task selected, use the Shift key to select the last of the consecutive tasks.
5. Click the **Indent** toolbar button , or right click and select Indent.

See All About Tasks (page 24) for more information on summary tasks.

WHAT'S NEXT

Assigning employees to each task created for the project.

Assigning Resources

You can assign resources to tasks at any time while building your project plan. The resources can be employees, skillsets or a combination. The following describes how to assign employees to tasks, how to assign skillsets (placeholders) to tasks, and how to replace the placeholders with employees when applicable. Full details on resources and their properties are located in All about Resources (page 30).

Prerequisites:

- Employees to assign to projects must have first been added to the database. Instructions on adding employees begin on page 63.
- Employee Working Time settings, which set each employee's daily schedule, should be established (page 33).

Assigning employees to tasks:

Assign one or more employees to one task

Option 1: Select the employees from the right side pane and drag them on top of the task's **timeline bar** in the **Gantt area**.

Option 2: Drag the employees on top of the **task's name in the Task column**.

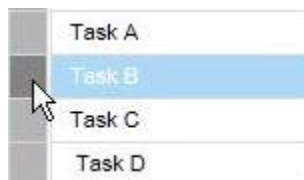
Important: By default, the software will use 100% of the assigned employee's working time to schedule work for the project. To conserve some free time for other projects occurring in the same time frame, reduce this 100% value to a lower amount using the Target Allocation function for each applicable employee assigned to the project. See Target Allocation on page 31 for more details.

Notes:

- When an employee is assigned to a task, that task's duration (Start/Finish dates) is automatically adjusted based on a variety of factors. This may cause an employee to be over allocated (overbooked). This is a temporary situation corrected by leveling a project once all assignments have been completed. Leveling distributes the workload appropriately. You can level the project at any time during the assigning process to get updated allocations and timelines.
- When more than one employee is assigned to a task, the estimated hours may not be evenly split between the assigned employees after the project is leveled. The leveling function distributes the employee effort to get the earliest end date possible for the completion of the task. In some situations, it may even occur that some assigned employees have no estimated time against the task.
- An assignment's Start and Finish dates will not be adjusted when the project is leveled if the assignment's Start and Finish dates have been manually set.

Assign one or more employees to multiple tasks


1. Select the tasks by clicking on the task names.



(Use the **Shift key** to select adjacent tasks or **Ctrl** for non-adjacent tasks.)

2. Click and drop the employees on top of any of the selected tasks in the Task column.

Removing an employee from a task (Unassign)

Right click on the employee name to the right of the task bar and select **Delete Assignments** .


Assigning Skillsets to tasks (Placeholders):

Skillsets are useful in project scheduling when the type of work to be performed can be reasonably defined (Mechanical Engineer, Interface Designer, etc.) but the exact employee to assign to the work cannot be finalized. Using skillsets permits a manager to create a detailed project plan without having to know exactly which employee will work on a task, and then assign employees at a later date. This feature can be important in lengthy projects. Using skillsets does not diminish the cost planning aspects of project scheduling as hourly rates can be defined for each skillset.

When you assign a skillset to a task, a placeholder is automatically created (in the lower right pane) and the placeholder is assigned to the task instead of the original skillset. The creation of placeholders is important when the time comes to replace these temporary assignments with employees. The placeholder's name is created using the skillset's name plus a sequential number. For example, the first time the Web Designer skillset is assigned to a task, the Web Designer 1 placeholder is created. The Web Designer 2 placeholder is created the second time the skillset is assigned. You have the option to always use the first placeholder created (Web Designer 1) by dragging and dropping it on tasks instead of using the skillset.

Assign a skillset to a task

Prerequisite:

- Skillsets must have already been created. Click the **New Skillset**  button on the Skillset toolbar. Full details on creating skillsets begin on page 35.


Option 1: Select the skillset from the right side pane and drag it on top of the task's **timeline bar** in the **Gantt** area.

Option 2: Drag the skillset on top of the **task's name in the Task column**.

Notes:

- A project can be published with placeholders. However, the placeholder assignments will not be displayed in other Dovico Planning & Timesheet views.
- You can assign skillsets to multiple tasks using the method described in the previous section.
- Placeholders are unique to each project. That is, a placeholder created for Project A is not available for Project B.

Replacing placeholders with employees:

1. Select the **Placeholder** in the bottom right side pane.
2. Click the **Replace Resource** button  on the toolbar located immediately above the list of placeholders.
3. Select the **Employee** to assign. The default Employee list only shows the employees assigned to the original skillset. You have the option to **Show all Employees** in the list.
4. You have the option to use the employee's default rates, the original skillset rates, apply different rates or use the rates already applied.
5. Click **OK**.

WHAT'S NEXT

Level the project's resource assignments to make sure no employees are overbooked.

Leveling a project


Leveling is required to distribute the work assigned to employees in a reasonable manner based on each employee's existing workload and future availability. Leveling is used to make sure that employees do not have too much work scheduled for a given day, week, month, etc. Leveling is also important to determine a project's expected finish date.

The following describes (1) how to level a project's resources and (2) some of the rules and factors used when leveling.

How to level a project's resources:


Leveling should be done:

- After all assignments have been made.
- Before a project is published.
- After modifications to assignments or hours are made to a published project.

1. From the Project Scheduling view, click the **Level** button  on the toolbar.

An option to Clear all Start Constraints is offered when one or more tasks have an established start constraint date. A task's Start Constraint is the forced date a task is scheduled to begin regardless of resource availability or other task dependencies (see Notes on next page). When leveling, a task that has a Start Constraint is not adjusted and other tasks are scheduled to work around it. This option does not clear task assignments that have both Start and Finish date constraints.

2. Review the project's revised schedule, budget and resource allocations. Project Statistics are available in the lower left corner. If enabled, you can review costs in any currency using the Currency drop-down list in the upper right corner of the view.

To keep the leveling results, click the **Save** toolbar button . Note that the leveling results are saved but the assignments are not available to employees until the project is published (or re-published).

Tip: You can level a project at any time while making assignments to get updated allocations and timelines.

Notes:

- You can level and publish with placeholders.
- When leveling an employee's workload, all of the employee's available working time is used to schedule the work. To leave the employee some free time for other concurrent projects, read about the Employee Target Allocation function page [31](#).
- You can print the project plan by clicking the Print button located in the Chart section of the toolbar.

What happens when leveling is done:

The project's schedule is modified based on the project's start date, resource availability and the budgeted hours for each task assignment.

Determining **resource availability**:

- All published Project Planning projects are considered.
- Any projects created using the Project Assignments view that have budgeted hours and any integrated Microsoft Project projects are considered.
- Unpublished Project Planning projects are not considered.

The task's **start date** is scheduled based on 3 factors:

- Task Priority: The highest priority task is scheduled first.
- Task Dependency: Tasks that have dependencies are scheduled before tasks that do not.

- Top to Bottom: Remaining tasks are scheduled in the order (top to bottom) in which they appear in the Task pane.

IMPORTANT: A task that has a **Start Constraint** is not adjusted and other tasks are scheduled to work around it.

The task's **finish date** is based on:

IMPORTANT: A task that has a **Finish date Constraint** is not adjusted and other tasks are scheduled to work around it.

- Hours required to complete the task.
- The days the employee assigned to the task is available to work.
- The amount of work the assigned employee can work daily.
- Any Target allocation % specified for the task assignment.

Notes:

- A Start constraint can be set by either dragging the task bar right or left within the Gantt area, or by checking the task's Start at box in the task's properties.
- When more than one employee is assigned to a task, the estimated hours may not be evenly split between the assigned employees after the project is leveled. The leveling function distributes the employee effort to get the earliest end date possible for the completion of the task. In some situations, it may even occur that some assigned employees have no estimated time against the task.
- When leveling using a placeholder, the default employee working time calendar is used.


WHAT'S NEXT

Publish the project to make it available to the assigned employees so they can begin tracking their time and expenses on this project.

Publishing a project

Publishing a project is required before employees can begin tracking their time and expenses against the project.

To publish a project:

1. Verify that the project's schedule, budget and resource allocations are within scope.
2. **Save** the project.
3. Click the **Publish** toolbar button .

You may be prompted to level the project before publishing.

Once published, the Project Planning project is displayed in the rest of the software's views and tools. However, editing restrictions in those views are enforced. In general, a Project Planning project can only be modified using the Project Planning tool; some exceptions apply. The project is displayed in other administrative views for reviewing and reporting purposes.

Warning: You can publish with placeholders. However, the placeholder assignments are not available for time entry and any budgeted time and costs associated with the placeholders are not shown in other administrative areas of the software such as the Project Assignments and Budgeted Time & Costs views.

Notes:

- The published project's schedule is automatically saved as the project's Current Plan for the Progress view. If you plan to use and compare multiple baselines throughout the project's progress, we recommend that you save a named baseline (page 42) after a project is published for the first time or when re-published after changes have been made.
- When you edit an existing project and then re-publish it, all resource assignments are updated.
- In the editing process, if a task that has actual hours entered against it is deleted, then those hours are lost when the project is republished.
- You can print the project plan by clicking the Print button located in the Chart section of the toolbar.

Before you begin adding projects for the first time

Before you begin adding projects using the Project Planning tool, there are important setup details to complete, and factors to consider.

Employees

- Add employees - All employees listed in the Project Planning tool's Resources pane are created and managed in the Project Assignments view. Note: Employees cannot be added to the database using the Project Planning tool.
- Review the employee's **work days per week** and **hours per day** settings using the Project Planning tool's Working Time tab. These settings are used to determine how much available time each employee has to work on projects.
- Use the Project Planning tool's Vacation tab to establish planned time off for the employees. These can be vacation days unique to each employee or common days off for all employees such as bank holidays. The Project Planning tool will schedule projects around these days off.
- If you are tracking or budgeting costs, then each employee should have an assigned Pay rate (Rate of wages) and Billing rate (Rate charged). These are set via the employee properties (page 63).
- Review/set the employee's **Admin%** using the Project Planning tool's Working Time tab. The Admin% is the percentage of time allocated per day to non-project or administrative work typically not represented in Project Planning tool projects. In establishing the Admin% value, any active projects created in the Project Assignments view should be considered. The more of these active projects that exist, the higher the Admin% should be. The remaining percentage (100% - Admin%) is used as available time for scheduling work in Project Planning tool projects. If you plan to convert some of your existing Project Assignments view projects into Project Planning tool projects, then these can be ignored when determining the Admin% value.

Projects

At this point, we assume you have decided that the new project should be built using the Project Planning tool as opposed to the Project Assignments view. If unsure, then go to Overview - Projects and Assignments on page 11.

If you have upgraded from Dovico Timesheet, you can leave your existing projects in the Project Assignments view until their conclusion or you can import some or all of these projects into the Project Planning tool. Any Project Assignments view projects that are administrative in nature, and that don't have established estimated hours should remain Project Assignments view projects. It's important to determine which of these existing and active projects will be imported into the Project Planning tool before you begin creating new projects since this will have an impact on Employee settings - described next.

Importing existing projects

If you have chosen to import and convert existing Project Assignments view projects into the Project Planning tool, then this should be done before you create a new Project Planning tool project. This is particularly important when projects are occurring at the same time. Before importing and converting multiple and concurrent Project Assignments view projects, you must determine the following:

How many projects are being imported?

Determine what percentage of an employee's time is allocated to each imported project.

Determine what percentage of an employee's available time should be kept for new Project Planning tool projects.

Import one project at time, level and publish.

Details on these steps are located in Adding Multiple Concurrent projects (next page).

Adding Multiple Concurrent projects

This page deals with the finer points of having multiple projects that have overlapping time frames. If your company only works on one project at a time, or if no employees work on more than one project at a time, then you can skip the following information.

Why this is important to understand

If you are adding new projects to the Project Planning tool that are occurring during the same time frame, and the same employees are working on each one, then you need to properly allocate each employee's available time in the right proportions. This step is required because the Project Planning tool will, by default, use up all of an employee's available working time on the first project you enter into the system - leaving no free time for the other projects planned for the same time frame.


Example:

You have 3 concurrent projects to add (A, B and C) and Margaret is working on all three. These 3 projects have roughly the same planned start and finish dates. When you create the assignments for the first project (project A), the Project Planning tool will, by default, use all of Margaret's available time on this project, and therefore leave no free time for the other 2 projects. In this example, you've determined that 50% of Margaret's time should be allocated to the first project, then 25% and 10% for the other 2 projects. This leaves 15% of her time to work on any new project spanning this time frame.

Note that the same rules apply if you are importing and converting existing projects created directly in the Project Assignments view.

The following assumes that you have working knowledge of Project Planning tool functionality. If not, see Basics (page 13).

How to add concurrent projects:

1. Determine which projects are being added that span the targeted time frame.
2. Determine what percentage of an employee's time is allocated to each project. Depending on each employee's priorities, this could vary from employee to employee.
3. If applicable, determine what percentage of an employee's available time should be kept for new future Project Planning projects.
4. Add the first project.
 - a. Set the project's start date.
 - b. Create all tasks and employee assignments.
 - c. For each assigned employee, use the Target Allocation feature  to set the allocation percentage for the project (determined in step 2 above). In the example listed above, you would set this at 50% when adding the first project. Check the Update existing assignments option when using this option.
 - d. Level the project.
 - e. Review allocation levels, finish date and costs.
 - f. Publish the project
5. Import the next project and repeat steps 4a. through 4f. described above.

Details and FAQs

The following section in Project Planning contains more comprehensive information on all the features and functions not detailed in the previous pages.

All about Tasks	page 24
All about Resources	page 30
Resource Working Time/Vacation.	page 33
All about Resource Availability (Resource Utilization)	page 37
Tracking a project's progress	page 40
Baselines	page 42
Miscellaneous	page 45


All about Tasks

In its simplest form, a task is a project activity against which employees track their time. At a minimum, a task requires a name and a budgeted number of hours required to complete the task. Additional properties can also be applied to a task. These include dependencies, priority, description, etc.

This lengthy section describes tasks created and used for Project Planning projects. It explains all the available options and highlights how the tasks created in the Project Planning tool are different from tasks created in the Project Assignments view. Assigning resources to tasks is covered in Assigning Resources on page 16.

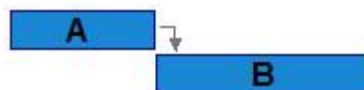
Quickly Add a Task


1. In the **Task** column on the left, click in an empty cell and enter the task name. The name should be clear and concise enough for the employees tracking time against the task. You can later add a full description to better detail the task (see 'Complete Task Properties' on the next page).
2. In the **Hours** column, enter the budgeted number of hours required to complete the task. By default, 8 hours is entered for each task added.

After entering budgeted hours for a new task, a small link icon  may appear next to the budgeted hours. You have the option to use this link to quickly create a dependency between this new task and the task immediately above it. Task dependencies are described next.

Linking Tasks / Creating Dependencies

The Project Planning tool uses one type of link dependency: **Finish to Start**. A Finish to Start dependency should be set when one task (the predecessor) must be finished before another task can start (the successor). The Project Planning tool uses the project's budgeted hours for tasks and their dependencies to determine the project's scheduled finish date.




1. Click on the **predecessor task** (Task A) - the task that must finish before the other task can start.
2. While holding the **Ctrl key**, select the **successor task** (Task B) - the task that cannot start before the other is finished.
3. Click the **Link** button  on the toolbar.

The dependency is displayed in the Gantt area as a thin line connecting the tasks.

Tip: By selecting multiple consecutive tasks and then using the Link button, you can easily create a chain of task dependencies.

Use the **Break Link** toolbar button  to remove a dependency.



Notes:

- You can also mouse over the line graphic linking tasks to review dependency information.
- A task can have multiple successor tasks.
- If a task has a **Fixed Finish date** (page 26), it cannot be set as a successor to another task.
- You can review dependencies by viewing a task's properties  using the toolbar button or the right click function.
- Dependencies cannot be set on Summary tasks.

Summary Tasks

For larger projects, you can create summary tasks to better group adjacent tasks that have common characteristics or have a logical grouping, and that are scheduled in the same time frame. Summary tasks can be interpreted as project phases or milestones. Creating summary tasks can also help reduce the visual clutter and make the Gantt view more readable.

The following instructions assume that the summary task has not yet been added.


1. Click on the **top most task** you want to group together.
2. Click the **Insert** toolbar button . This creates the location for the summary task (above the task selected in step 1).
3. Enter a name for the summary task. There is no need to enter hours for summary tasks since the sum of the sub-tasks' hours will be displayed in the Hours column.
4. Select **the tasks** to include in the Summary task. The selected tasks must be immediately below the summary task and must be consecutive. TIP: With the first task selected, use the Shift key to select the last of the consecutive tasks.
5. Click on the **Indent** toolbar button .

Notes:

- A summary task is automatically created when one or more consecutive tasks are indented. Whichever task that appears above the tasks indented is automatically converted into a summary task.
- You can create summary tasks within summary tasks.
- Summary tasks are not available for reporting.
- For managers and administrators, a summary task created in the Project Planning tool is not the equivalent of task groups created in the Project Assignments view. For time entry users, a summary task is identical from a task group.

Warning: If you delete a Summary Task, all indented tasks and their assignments will also be deleted. To remove a Summary Task, the better approach is to first outdent the sublevel tasks, and then delete the summary task.

COMPLETE TASK PROPERTIES

All task properties are available for review and editing by selecting the task and clicking the Task Properties toolbar button . You can also right click on the task name and select **Properties**.

Primary details

Name: The name of the task as it appears to time entry employees tracking time on this project.

Hours: The budgeted hours required to complete this task. The budgeted hours are distributed between the employees assigned to this task.

Secondary details

Assignments tab

Priority: Used to set the priority of this task when leveling the project, with the biggest number representing the highest priority task. The default value for new tasks is 500. See Leveling (page 18) for more information on how Priority is used when leveling a project.

Start at checkbox (Start Constraint) When checked, this is the forced day when this task is scheduled to begin regardless of task dependencies or resource availability. A task's Start constraint checkbox is also automatically set when the task's timeline bar is dragged right or left within the Gantt area. Enabling the Start constraint has some effects when the project is leveled and should be used with care. When leveling, you are given the option to clear all start constraints.

Starts at: When a task is added, its start date is initially set to the project's start date. It is automatically adjusted when there are task dependencies, when the project's start date is changed or when the project is leveled.

Finishes at: When enabled, you can use this field to force a fixed finish date to the task. See Fixed Start and Finish Dates below.

Hours: The number of hours estimated to complete the task - the value is initially set in Hours column in the Gantt view.

Resources: The resources assigned to the task, along with their default Allocation % (or Hours), hourly Cost (pay) and Charge (billing) rates. If enabled, each rate's currency is also displayed.

- The default Allocation percentage (**All.%**) used is 100%. At 100%, when the project is leveled, all of the employee's available working time is used for this assignment, which leaves no free time for other projects in this time frame. This value can be modified for individual assignments or can be modified for all the project's assignments using the Employee Target Allocation option (page 31).
- **Hours** is displayed instead of Allocation % when the task has a Fixed Finish Date.
- The default **hourly Cost and Charge rates** (and **currencies**) are retrieved from each employee's profile (page 64). The currency may be different than the currency selected for the project, but when costs are calculated, the appropriate currency exchange rates will be applied when displaying costs at the project level.

General tab

Task Group: The task group to group this task for reporting purposes only. This list is generated from the list of Task Groups created in the Project Assignments view.

Prorating: The prorating value is used to assign a proportionate value to this task when billing clients for time on this task.

Description: This description can be seen by those entering time in the time entry tool's 'Task Description' field. The task description is also used as the default entry for the 'Time Entry Description' field in the time entry tool, and can be modified by the employee for each time entry.

Force description: Check this option to force the time entry user to enter a Time Entry Description when tracking time against this task. With this option checked, the task's Description (as described above) is not entered as the default Time Entry Description.

WBS code: The Work Breakdown Structure value automatically generated from the Project Planning tool.

Custom Fields: Any task specific custom fields created using the Custom Field Template. Note that task custom fields flagged as Required are not enforced when creating tasks in the Project Planning tool.

Dependencies tab

Shows any Finish to Start dependencies created using the Project Scheduling view's Link function.

Tip: When using the 'Force description' option described above, you should remove the ability from users to hide the Time Entry Description field (see Timesheet Options, page 204).

Fixed Start and Finish Dates

It is possible to set both Fixed Start and Finish Dates on a task. By setting these, the task's Start and Finish dates will not change regardless of the amount of budgeted hours set for the assignment or the number of employees assigned to work on it. These dates will also not change when the project is leveled. In Microsoft Project language, this is referred to as a 'Fixed Duration Task'.

Warning: Setting a Fixed Finish Date for a task can easily cause one or more employees to become overallocated. This overallocation can only be corrected manually by assigning more employees to the task, adjusting the task's Start or Finish dates or reducing the number of budgeted hours.

Setting Fixed Start and Finish dates to a task

1. **Right click** on the task and click **Properties**.

From the Assignments tab.


2. Check the **Starts at** box and set a **Start Date**.

3. Check the **Finishes at** box and set the **Finish Date**.
4. Click **OK** to accept the changes.

The **Hours column** replaces the Allocation % column when a Finish Date is set.

Resource are overallocated

Overallocation issues caused by using fixed Start and Finish dates.

When applying both Start and Finish dates to a task, its resources can easily become overallocated. When this occurs, a **warning symbol**  is displayed to the left of the problem resource and a message is displayed at the bottom of the window. The warning symbol is also displayed in the Project Scheduling tab's left most column. This warning symbol is not displayed if only Fixed Start dates are used.

- You can accept the overallocation.
 - You can assign additional resources to the task.
 - Assign a different resource to the task.
 - Reduce the number of hours budgeted for the task.
 - Change either the Start or Finish dates.
- At any point, if you click on the warning symbol, the hours assigned for this resource will automatically change to an amount equal to this resource's available hours. That resource will not longer be overallocated.

Example: Rob is assigned 50 hours of work between the task's Start and Finish dates. He is the only person assigned to this task. He is shown as overallocated because he has fewer than 50 available hours in that date range. By clicking on the warning symbol, his assigned hours automatically changes to his available hours (in this case 40 hours). At this point, you will see a message at the bottom of the screen indicating that there are 10 hours left to be assigned.

Note: When either the Start or Finish dates are set, the Priority field is still enabled but is ignored when the project is leveled.


Task Properties - Task 4 ✖

Assignments **General** Dependencies

Priority: Starts at:

Hours: Finishes at:

Assignments:

Resource	Hours	Cost (h)	Charge (h)
 Boyde, Rob	50.00	50.00 CAD	125.00 CAD
[None]	0.00	0.00 CAD	0.00 CAD

Resources are overallocated

Need to schedule xx hours

Caused by manually adjusting the total number of Hours assigned (or the assigned resource's hours) so that the assigned resource hours is less than the total hours estimated

Task Properties - Task 5

Assignments | General | Dependencies

Priority: Starts at:

Hours: Finishes at:

Assignments:

Resource	Hours	Cost (h)	Charge (h)
Boyde, Rob	10.00	50.00 CAD	125.00 CAD
[None]	0.00	0.00 CAD	0.00 CAD

Need to schedule 10.00 hr(s)

Overbooked by xx hours

The resource has more assigned hours than are required by the task.

Task Properties - Task 3

Assignments | General | Dependencies

Priority: Starts at:


Hours: Finishes at:

Assignments:

Resource	Hours	Cost (h)	Charge (h)
Boyde, Rob	40.00	0.00 CAD	0.00 CAD
[None]	0.00	0.00 CAD	0.00 CAD


Overbooked by 10.00 hr(s)

Miscellaneous functionality

You can **insert a new task row** between existing tasks by clicking on the lower task and clicking the Insert toolbar button .

Use the **Cut/Copy/Paste** options    to copy tasks and their assignments.

Use the **Paste External Task** toolbar button  to paste data copied to your clipboard (from Excel, Microsoft Project, etc.).

To find a task's location in the Gantt area, select the task and click the **GoTo** toolbar button .

To delete a task, select the task and click the **Delete** button  on the toolbar.

How Tasks in the Project Planning tool are different

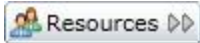

To time entry employees, there are no differences between tasks created in the Project Planning tool with those created in the Project Assignments view. However, for managers and administrators, there are differences.

They are **different** in the following ways:

- Tasks created in the Project Planning tool are not available in the Project Assignments view to be assigned and vice versa. They may appear in the Project Assignments view when viewing assignments, but they cannot be edited in any way.
- Within a Project Planning project, multiple tasks can have the same name.
- Tasks created in a Project Planning project are specific to that project and cannot be 'reused' in another Project Planning project. This means that there is no list of available tasks as found in the Project Assignments view. For each new Project Planning project, you must create all the tasks. If you have a lot of similarly structured projects, you can save time by creating and using a project template.
- Project Planning tasks do not generally appear whenever a list of tasks is displayed such as found when generating reports.

All about Resources

The Resources pane on the right side of the Project Scheduling view lists all **Employees**, **Skillsets** and **Placeholders** available to Project Planning tool projects. This lengthy section details these 3 components. Assigning resources to a project's task is covered in Assigning Resources (page 16).

The complete Resources pane, or its sub panes, can be hidden or re-sized using the  or  buttons, or by dragging the frame borders.

Employees

The **employee** list contains all employees that are available for Project Planning tool projects. By default, all employees that have their Software Access fields set to at least 'Time & Expense Entry only' are shown in the Project Planning tool's Employee pane. Individual employees can be removed by marking them as 'not bookable' using the Project Planning tool's Working Time tab. New employees cannot be added to the database from the Project Planning tool. They can only be added using the Project Assignments view (page 63).

Allocation %: The Allocation % column next to each employee shows how occupied the employee is, and can be useful before assigning an employee to new tasks. The Allocation % is the employee's approximate workload for the open project **and** all published projects.

Important: The Allocation % is calculated for the duration of the opened project (Start to Finish dates) and not the span of time displayed in the Gantt area's calendar. This is different from the information displayed in the Heat map (page 37).


By holding your mouse over an employee, the **Allocation % breakdown** is displayed. In the example below, Rob's overall allocation between October 4th and October 26th is 55%. This means that 45% of his time is available for additional assignments in this date range.

Name ▲	All. %										
Allen, Nathan	33 %										
Boyd, Rob	55 %										
<table border="1"> <thead> <tr> <th colspan="2">Boyd, Rob</th> </tr> <tr> <th colspan="2">Allocation % breakdown</th> </tr> <tr> <th colspan="2">From: 10/4/2014 To: 10/26/2014</th> </tr> </thead> <tbody> <tr> <td>% on other Projects:</td> <td>33 %</td> </tr> <tr> <td>% on this Project:</td> <td>22 %</td> </tr> </tbody> </table>		Boyd, Rob		Allocation % breakdown		From: 10/4/2014 To: 10/26/2014		% on other Projects:	33 %	% on this Project:	22 %
Boyd, Rob											
Allocation % breakdown											
From: 10/4/2014 To: 10/26/2014											
% on other Projects:	33 %										
% on this Project:	22 %										
Brown, Bill	65 %										
Clarke, Bill	65 %										
Coleman, Bill	65 %										
Fox, Bill	65 %										
Gardner, Bill	65 %										
Gates, Bill	65 %										
Hall, Alexandra	65 %										
Harris, Tyler	63 %										
Johnson, Nancy	29 %										
Martinez, Brandon	66 %										
Moore, Sarah	57 %										

Tip: You can **sort** the list by employee name or Allocation % by clicking on any of the column headers in the list.

Employee pane toolbar functions



The **Employee Replace Resource** button  is used to replace the project's assignments from one employee to another.


Select the new **Employee** to assign and optionally modify the assignment's wage and charge out rates:

Default Employee - Use the replacement employee's rates.

Existing employee rates - Keep the existing assigned employee's rates.

Specify rates - Manually enter new rates. If enabled, select the currency applicable for each rate. For example, 50.00 USD or 30.50 GBP. Time entries and estimated hours are stored using these rates (and currencies) to calculate the project's actual and budgeted company and client costs.



Leave rates - Leave the rates already applied. An assignment's rates can be viewed via the task's assignment properties.

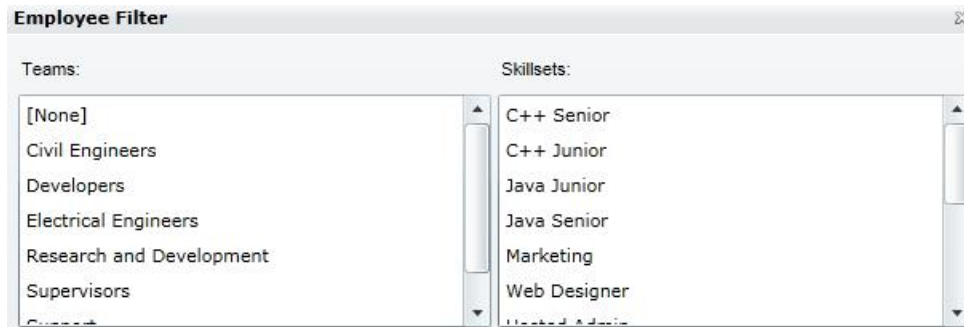
Employee Target Allocation % button  is used to establish a new default allocation % for an employee's assignments in the opened project. Because the Project Planning tool uses all of an employee's available working time for the current project, this feature is useful when a manager wants to leave an employee some free time to work on other, simultaneous projects.

Example: Zina is working at full capacity on Project A. Project B is new and Zina must work on this one at the same time as Project A. When planning project B, Zina is shown as already 100% allocated (on Project A). To free up some time, Project A is opened and Zina's allocation percentage is changed from its default setting (100%) to a lower value. When Project A is re-leveled and re-published, this creates some free time for Zina to work on Project B.


Check the '**Update existing assignments for this Project**' box to update all existing and future assignments for this employee. If not checked, only new assignments will use this new Target Allocation percentage.

Read 'Adding Multiple Concurrent projects' (page 22) for a more thorough example.

Use the Filter toolbar button  to filter the Employee list by Team or skillsets. Use the  button to remove the applied filter.



The **Employee Filter** dialog box is divided into two columns: **Teams** and **Skillsets**. The **Teams** column contains a list with the following items: [None], Civil Engineers, Developers, Electrical Engineers, Research and Development, Supervisors, and a partially visible item below. The **Skillsets** column contains a list with the following items: C++ Senior, C++ Junior, Java Junior, Java Senior, Marketing, Web Designer, and a partially visible item below. Both columns have vertical scroll bars.

Use the **Update Rates** button  to modify the company or client hourly rates applied to existing assignments in this project. The initial rates (and currencies if enabled) applied to each assignment are based on the assigned employee's default Rate of Wages and Rate Charged values as defined in the employee's profile. Note that this function only modifies the rates for assignments that already exist. If new assignments are created, the default employee rates are applied against these new assignments, and these will have to be modified using this option again.

If editing the Company Cost or Client Cost rates, then the link to the original source information for the rate is broken, and any updates to the source rate information is not transferred to the edited assignment.

Example: Bob is assigned to a task and his Rate of Wages (as established in [his employee profile](#)) is \$35/hour. You manually adjust the rate for this assignment to \$40/hour using Update Rates. Bob's Rate of Wages is later changed in [his profile](#) to \$45/hour. This new rate will not be applied to any assignments manually edited using Update Rates.



The **Update Employee Rates for Project** dialog box features an **Employees** list on the left containing "Boyd, Rob" and "Garcia, Margaret". To the right of this list are two checkboxes: **Company Cost:** and **Client Cost:**, each followed by an empty text input field. At the bottom of the dialog are three buttons: **Select All**, **OK**, and **Cancel**.

Select one or more **Employees**, check one of the Cost fields, and enter the hourly rate. If enabled, optionally update the currency applicable for the updated rate.

Company Cost: The hourly Rate of Wages for the employee

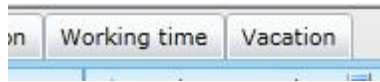
Company Cost Currency: The currency linked to the employees' Rate of Wages.

Client Cost: The hourly Rate Charged for the employees

Client Cost Currency: The currency linked to the employees' Rate Charged.

Employee Availability

For the Project Planning tool to accurately schedule work, the software must know when employees are available and what their work limits are. Along with the data from other published projects, the Project Planning tool uses employee **Working Time** and **Vacation** settings to schedule a project's work.



The **Working Time** tab establishes the following settings for each employee. Double click on the employee name to adjust settings.

Work Days: The days per week worked (Monday, Tuesday, etc.).

Hours Per Day: Number of hours worked each day. Note that this value can also be set using the Working Hours field in each employee's profile.

Bookable: Whether the employee is available to be assigned to tasks in the Project Planning tool. When not bookable, the employee does not appear in the Resources Pane.

Admin %: The percentage of time allocated per day to non-project or Administrative work. The remaining percentage is used as available time for scheduling work and is considered the effective (defacto) 100% availability for scheduling.

Example: Rudy works 40 hours a week and has an Admin % setting of 20%. This means that 8 hours per week (40×0.20) cannot be scheduled for Rudy. The remaining 32 hours is now considered by the Project Planning tool as full allocation. This means that when you book Rudy at 100% for a project, she is scheduled for a maximum of 32 hours per week on the project.

Over/Under Allocation %: Used as general gauges to see if an employee is over or under scheduled. The values are used for reporting purposes and are not used when scheduling projects.

Tips:

- You can sort employees by name, bookable status, etc., by clicking on any of the column headers.
- You can filter employees by Team using the drop-down list at the top of the window.

Notes:

- If you uncheck a Bookable employee, existing assignments for the employee are not lost.
- Use the Set as default for new Employees to make the existing Working Time settings the default values for all future employees added to the system.

Working Time Properties - Hall, Alexandra

Work days:

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Hours per day: Admin %:

Under allocation %: Over allocation %:

Bookable Set as default for new Employees

OK Cancel

The **Vacation** tab establishes planned time off for employees. These can be vacation days unique to each employee or common days off for all employees such as bank holidays. Use the toolbar buttons to create

 or edit  Vacation time.

Employees: Select one or more employees for this planned time off period. When [ALL] is selected and a new employee is later added to the database, then the new employee is automatically assigned to the time off period.

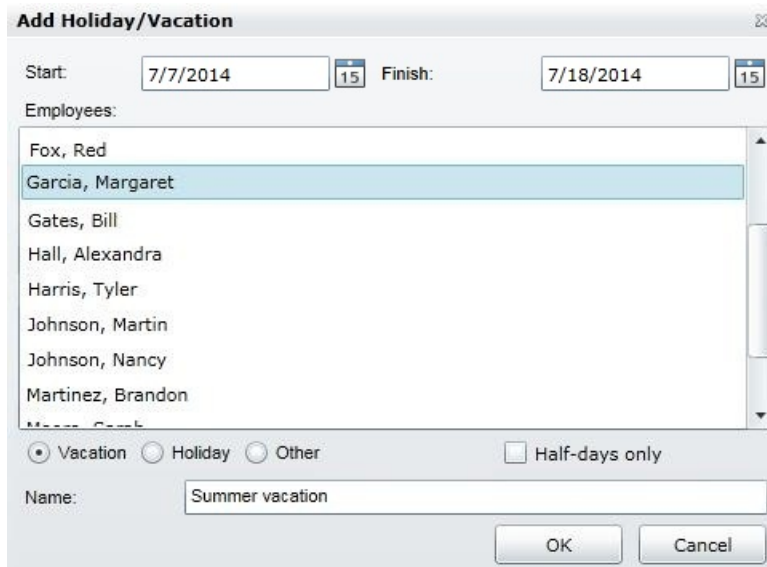
Type: Vacation, Holiday or Other.

Half day: To set if the planned time off is for a full or half day.

Tip: The 'Other' option for Type can be useful for unplanned leave such as a lengthy illness. Example: If an employee missed 5 days work, you could add this time off as 'Other' and then re-level the project to see the impact on the planned schedule. Any other projects the employee was scheduled to work on during this absence would also have to be re-leveled.

Notes:

- Holiday or Vacation time planned is not entered into the user's Time Entry tool. The period is simply made unavailable for project scheduling.
- Time off cannot be set for any amount less than 1/2 day.
- Vacation time cannot be planned over Holiday time.
- Recurring Holidays cannot be created in this release.



Add Holiday/Vacation

Start: 7/7/2014 15 Finish: 7/18/2014 15

Employees:

- Fox, Red
- Garcia, Margaret
- Gates, Bill
- Hall, Alexandra
- Harris, Tyler
- Johnson, Martin
- Johnson, Nancy
- Martinez, Brandon

Vacation Holiday Other Half-days only

Name: Summer vacation

OK Cancel

Assigning an employee to a task: In its easiest form, you assign by dragging and dropping the employee on top of the task. More detailed instructions and options for assigning employees to tasks can be found in Assigning Resources (page 16).


Skillsets


The **Skillset** list contains all skillsets available to assign to tasks. Skillsets are created, associated to employees and assigned to tasks.

Skillsets are temporary resources useful in project scheduling when the type of work to be performed can be reasonably defined (Mechanical Engineer, Interface Designer, etc.) but the exact employee to assign to the work cannot be finalized. Using skillsets in lieu of actual employee assignments does not diminish the cost planning aspects of project scheduling as hourly rates can be defined for each skillset.


Skillset pane toolbar functions



New : Enter a unique Name, hourly rate of Wages (Pay rate) and hourly rate Charged (Billing). If enabled, select a currency for each skillset rate.

Edit : Edit the existing skillset.

Delete : Delete the skillset and all Placeholder assignments created using the skillset.

Skillset assignments : By associating skillsets to specific employees, you are able to easily update assignments created using skillsets with employees. From the skillset assignment pop-up, check the skillset in the left side pane, select the employees on the right and click the Assign button.

Assigning a skillset to a task: Drag the skillset on top of the task in the Gantt area. Notice that when you assign a skillset to a task, a placeholder is automatically created. The reason for this, and other details are explained in the Placeholders section (below).

Note: The rate values are hidden from users who do not have Read access to skillsets.


Placeholders


The **placeholders** list contains all the placeholders automatically created when skillsets are assigned to tasks.

When you assign a skillset to a task, a placeholder is automatically created (in the lower right pane) and the placeholder is assigned to the task instead of the source skillset. The creation of placeholders is important when the time comes to replace these temporary assignments with employees or to make specific wage and charge rate changes. The placeholder's name is automatically created using the skillset's name plus a sequential number. For example, the first time the Web Designer skillset is assigned to a task, Web Designer 1 placeholder is created. Web Designer 2 placeholder is created the second time the skillset is assigned. You have the option to always use the first placeholder created (Web Designer 1) by dragging and dropping it on tasks instead of assigning the skillset.

Placeholder pane toolbar functions



Placeholder allocation : Permits the manager to modify a placeholder's Target Allocation for the project - this function is very similar to the Employee Target Allocation described previously. By default, placeholder target allocations are set to 100%. Check the 'Update existing assignments for this Project' box to update all existing and future assignments for this placeholder. If not checked, only new assignments will use this new Target Allocation value.

Replace Resources : Used to select the employee and rates to replace the placeholder. By default, only the employees associated with the original skillset are displayed in the Employee drop-down list. Checking the Show all Employees box will list all.

Select the **Employee** to assign and optionally modify the assignment's hourly rates:

Use default Employee rates - Use the employee's rates.

Use skillset rates - Keep the existing skillset's rates.

Specify rates - Manually enter new rates. If enabled, select the currency applicable for each rate.

Leave rates - Leave the rates already applied. An assignment's rates can be viewed via the task's assignment properties.

Delete : To delete the placeholder and its project assignments.

Note: A project can be published with placeholders. However, the placeholder assignments will not be displayed in other Dovico Planning & Timesheet views. The same applies to budgeted time and costs for placeholder assignments.

All about Resource Availability

An important ability of the Project Planning tool is a means to answer questions regarding an employee's availability or existing workload (allocation) in a given period of time. The Project Planning tool has 3 locations to determine an employee's existing and planned workload. Each location has its own qualities depending on the questions asked and the level of detail required. All 3 options are described in this section.

These are:

The **Heat map** displays, using an area-based chart, an employee's allocation level across **multiple projects**.

The **Employee Allocation % Summary** provides each employee's allocation percentage for the duration of the **open project**.

The **Resource Utilization** view provides an employee's scheduled work **across multiple projects**.

You may use these in any combination to answer the following types of questions:

- Is an employee available to be assigned additional work?
- Do I have over/under allocated employees?
- What is causing an employee to be over allocated?
- What projects is an employee scheduled to work on now, and in the future?

Heat Map

The **Heat map** at the bottom of the Project Scheduling view is available to see an employee's allocation by day or date range.

From the Project Scheduling view, select the employee from the list in the right side pane.

- The Heat map displays the employee's workload for the date range spanning the width of the Gantt area. The levels displayed represent allocation for the open project **plus** all other published Project Planning projects **plus** any projects created directly in the Project Assignments view that have an estimate. The center line is the employee's 100% allocation level.
- By mousing over a particular portion of the heat map, an allocation summary for the specific range is displayed.
- By clicking on a specific portion of the heat map, a more detailed allocation breakdown by project and task is displayed.

Garcia, Margaret - Allocation Levels



Note: The Heat map can only display information for one employee at a time.

Employee Allocation % Summary

The **Allocation % Summary column** in the Employee pane displays an employee's workload for the duration of the open project and can be useful before assigning an employee to new tasks.

The Allocation % is the employee's approximate workload for the open project **and** all published projects. The Allocation % is calculated for the **duration of the opened project**. It's important to emphasize this last point: Unlike the Heat map, which shows allocation for the entire date range spanning the Gantt area, the Allocation % value is calculated for the date range of the opened project - which can be greater or smaller than the width of the Gantt area.

By holding your mouse over an employee, the **Allocation % breakdown** is displayed.

In the example below, Rob's overall allocation between October 4th and October 26th is 55%. This means that 45% of his time is available for additional assignments in this date range.

Name	All. %
Allen, Nathan	33 %
Boyd, Rob	55 %
Brown, ...	%
Clarke, ...	%
Collier, ...	%
Fox, ...	%
Gardner, ...	%
Gates, Bill	65 %
Hall, Alexandra	65 %
Harris, Tyler	63 %
Johnson, Nancy	29 %
Martinez, Brandon	66 %
Moore, Sarah	57 %

Boyd, Rob	
Allocation % breakdown	
From: 10/4/2014 To: 10/26/2014	
% on other Projects:	33 %
% on this Project:	22 %

Resource Utilization view

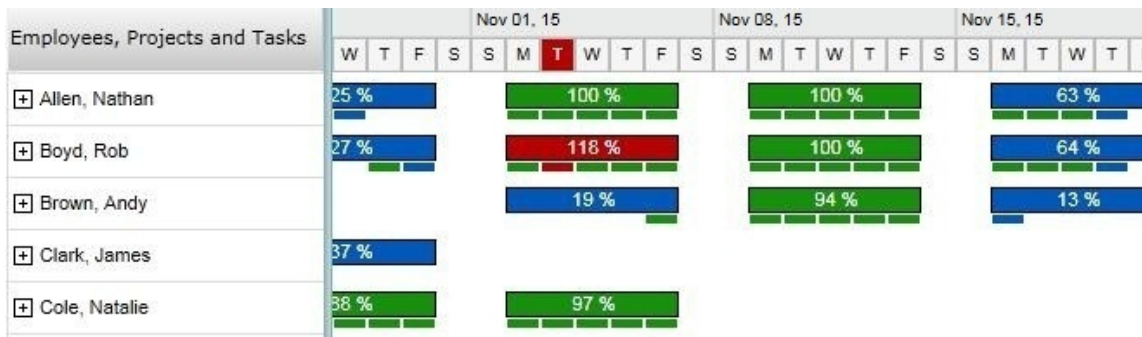
The **Resource Utilization** view is an employee-focused view and is used to see, in a forward looking timeline, how an employee is scheduled to work across multiple projects and tasks. By default, each employee is shown with summary level color coded bars representing his or her planned workload. You can drill down to reveal more details by project and task by clicking the "+" graphic in the left side pane. You can also mouse over a timeline bar to reveal additional details.

It's important to highlight that, unlike the Heat Map and Allocation Summary detailed previously, the Resource Utilization also displays information about unpublished Project Planning projects as well as Project Assignments view projects that have an estimate.

Each full bar (and bar segment) is color coded to represent the allocation level; red for over allocated, blue for under allocated, and green for 'within range'. The over and under **allocation levels for each employee are individually set** in the Working Time tab. This may explain why one employee shows **green** at 110 %, while another shows **red** at the same percentage.

Notes:

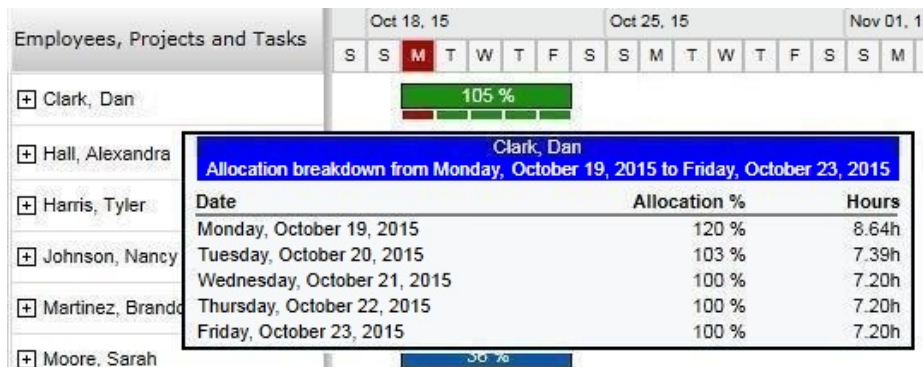
- You can view utilization by **percentage** or **hours** using the 'Show utilization in' option at the top left corner of the screen.
- The data displayed in this view is the employee's **planned work** as defined by each project's current plan. If a project is projected to take longer than defined in its current plan, then this will not be reflected in this view because only the planned work is displayed.
- The color code is only applied at the employee summary level. When an employee is expanded (+) to reveal projects and tasks, these are displayed in orange.
- You can print the Utilization view by clicking the Print button the toolbar.



Each timeline bar is separated into 2 sections. The top section represents the employee's allocation for the view's major date range setting. The smaller bar segments represent a breakdown for the minor date range setting.

In this example showing the **rollover details**, Dan's allocation for the entire week is 105%. The entire week is shown in green even though the week represents more than 100%. This is because his over allocation threshold is set to 110%.

The individual days are color coded as well, with the rollover detailing each day's allocation. Monday's allocation (120%) is over his threshold and shown in red. The other individual days are under his 110% threshold and are shown in green.



Tips:

- If any employee is over allocated on a given date, the calendar at the top of the screen will highlight the day in red. The same applies to weeks or months when the calendar timescale is set as such.
- You can use the Filter toolbar button to show only those employees that are over allocated, by team or by skillset.
- Use the Zoom In/Out toolbar controls to modify the time scale.

Notes:

- Any planned time off such as Vacations and Holidays are grouped together as a 'Vacation' bar, which cannot be expanded to reveal details.
- No placeholder assignments are displayed in the Resource Utilization view.


Tracking a project's progress

The **Progress** view allows a manager or administrator to **compare** a project's **current plan** against the project's progress (**projected schedule**) when time data, plus other project plans, are considered.

It is important to highlight two important design features of the Project Planning tool:

1. That a published project's schedule (**current plan**) is never automatically adjusted based on real world data. A published schedule remains the schedule until specifically adjusted by the manager. That said, a manager must be able to look at a project's status (projected schedule) not only using the data entered for the project, but also how other projects may be affecting the schedule. By analyzing other projects, resource allocations and priorities, the Progress view provides a more realistic outlook of a project's timeline.
2. That the use of **ETCs** is essential to be able to properly forecast an active Project Planning project's schedule. If ETCs are not used, the Project Planning tool is not capable of determining if a task will be over budget until after the submitted time is greater than the budgeted hours.

The Progress view can also be used to compare baselines.

Click the **Progress button**  on the Project Scheduling view's toolbar.

Interpreting the information:

By default, the **Current Plan** is shown in blue and the **Projected Schedule** is displayed in orange.

Definitions:

Current Plan = The project's budgeted hours and timeline as set in the Project Scheduling view.

Projected Schedule = The project's projected hours and finish date based on actual data entered by employees and **other project schedules** (see *Important Considerations on page 42).

Task	Hours	Hours
Task A	40.00	40.00
Task B	25.00	37.00
Task C	30.00	30.00
Task D	20.00	18.00

The **Current Plan Hours** are the task's budgeted hours as set in the Project Scheduling view.

The **Projected Schedule Hours** calculation is dependent on whether or not ETCs are entered for the project.

- If ETCs are entered, then the Projected Hours value is equal to: Actual Hours + ETC.
- If ETCs are not entered, then the Projected Hours value is equal to the Budgeted hours, or equal to the Actual hours if Actual Hours are greater than the Budgeted hours.

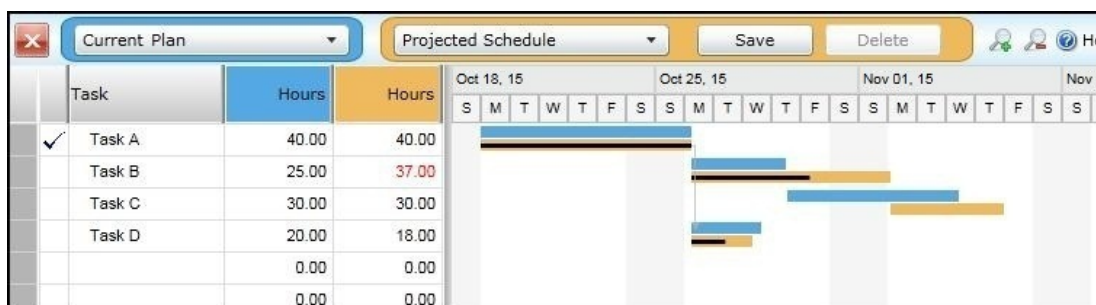
Note: If ETCs are used, then it is critical that all tasks that have time entries also have updated ETCs

You can review task **Start/Finish** dates using the timeline bars. A thin black line in the blue timeline bar represents actual hours entered by the employee.

In the following example, ETCs are used to track the project's progress:

- Task A's work budget is 40 hours and a total of 40 hours (Actual hours) have been entered against it. This task is complete as indicated by the checkmark at the left of the task name. It tracked perfectly against the budgeted hours and finish date (current plan).
- Task B's work budget is 25 hours and a total of 37 hours are entered (Actual hours + ETC). It is tracking to take longer than expected, and finish later than the original plan (current plan).
- Task C's work budget is 30 hours. No time has been entered against it yet. It is tracking to start later because of its dependency on Task B.
- Task D's work budget is 20 hours and a total of 18 hours are entered (Actual hours + ETC). It is tracking to finish sooner than the original plan (current plan).

The whole project is now tracking to finish late (July 30th instead of the planned date of July 28th). This is because Task B is taking longer to finish. In this scenario, Task D's earlier than planned finish has no impact on the schedule. As noted at the beginning of this section, the published project's plan is never automatically adjusted to reflect the projected schedule. Any changes a project manager wants to make to either bring the project back on schedule, or to extend the project's finish date, must be manually accomplished in the Project Scheduling view and then republished.



To the left of the Task column is the '**Completed**' indicator ✓. The rules governing when a check mark is shown are dependent on whether or not the project uses ETCs. An ETC can be set by the assigned employee using the time entry tool or by a manager using the Budgeted Time & Costs view.

- If an ETC is entered, a check mark is displayed when the ETC value is set to 0.
- If an ETC is not entered, the check mark is displayed when the Actual hours reaches or exceeds the Budgeted hours.

By clicking on a task's name in the Task column, details about the hours for the task are displayed.

In the image below, Task B's details are revealed:

Budget: The number of hours as established in the project plan.

Actual: The number of hours submitted and approved.

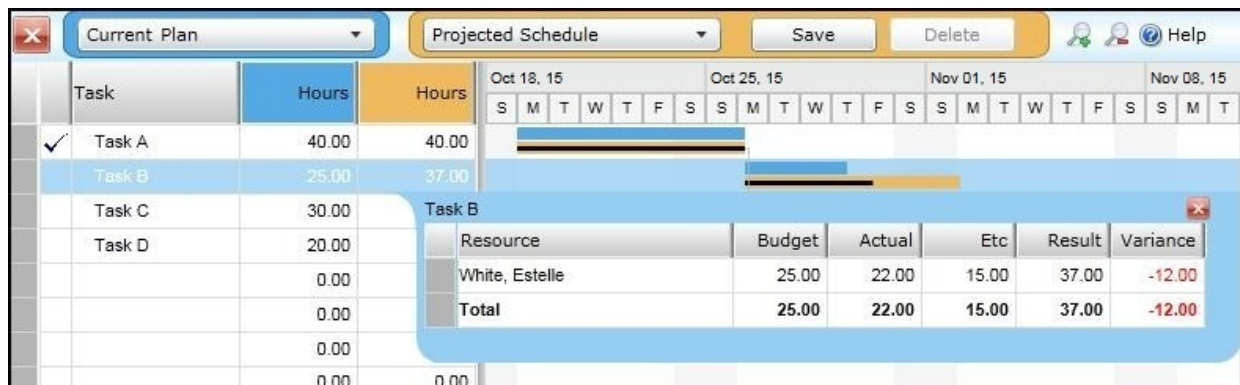
ETC: The ETC value.

Result:

- If ETCs are entered: Actual Hours + ETC.
- If ETCs are not entered: Result is equal to the Budgeted hours, or equal to the Actual hours if Actual Hours are greater than the Budgeted hours.

'Complete' is shown when ETC is set to 0. 'N/A' is shown when no ETC value has been entered.


Variance: Budget - Result.



Note: Actual hours entered by employees are displayed in the time frame the work is scheduled to take place and are not displayed in the day that the hours were actually worked.

At the bottom of the view, **statistics** and a **project progress summary** are provided.

Review Statistics	
Finish: 11/3/2015	Finish: 11/5/2015
Hours: 115.00	Hours: 125.00

 The Project is forecasted to be 2 day(s) behind schedule and 10.00 hour(s) over budget.

*Important Considerations

1. A task's **Projected Schedule finish date** is determined not only using the task's planned start date and its projected hours (as detailed above), but it also considers other scheduled projects. This can have the effect of showing a task's projected finish date being late even when the planned and projected hours are on track. This situation can occur when an assigned resource becomes over allocated (overbooked) **after** your project has been published. An employee may become over allocated by publishing a new project without leveling it or altering the employee's Administrative allocation %. Using the same logic, if a concurrent project is removed from the system, effectively freeing up some time, then a task may be projected to finish earlier than scheduled even though it will not take fewer hours to complete.
2. It is important to highlight the impact of consistently using, or not using, **ETCs** within a given project. As previously detailed, the projected hours calculation is based on whether or not an ETC is entered. Although to use ETCs or not is a project management level decision, it is important that the use (or not) be consistent within a project. This is because only one type of calculation is used throughout a given project. If at least one task has an ETC value entered, then the project is considered an 'ETC tracking project' and each task's projected hours is **calculated assuming** an ETC. If ETCs are not used in a project and one employee enters an ETC value for one task, then all the Projected Schedule values will be calculated assuming that ETCs are used for all assignments. This would have a dramatic effect on the projected schedule.

Tip: If you do not want employees to use/enter ETCs, you can hide this option from the time entry tool. Look for 'ETC column' in Timesheet Options (page 204).

Baselines

The **Progress** view allows a manager to compare a saved baseline against the project's progress, or to compare 2 saved baselines.

Saving baselines is important when you modify your original plan after its initial release **and** want to compare one plan to the other, or to compare your project's progress at multiple stages during its development.

What is a baseline?

A baseline is a snapshot of your project plan's progress at the time the baseline is saved. What this information represents, and how it can be used, varies depending on when the baseline is saved.

- Saving a baseline immediately after a project is published creates a snapshot of the **original plan**.
- Saving a baseline at any time during its progress creates a snapshot of the project's **projected plan**. This can be compared against the original plan or against other baselines taken during the project's progress.
- Saving a baseline after modifying a published project plan creates a snapshot of the **modified projected plan**. This can be compared against the original plan or against projected plans saved in the future.


The important fact to recall when working with baselines is that a baseline does not simply save the project's planned estimates. A baseline saves the project's *projected estimates* and *timelines* based on actual time and ETCs entered by employees, and other project schedules that affect your project's timeline. Simply put, it saves the state of your project schedule when real world data is considered. It saves the

Progress view's estimates and timelines that are displayed in **orange**. Note that actual hours entered against the project are not saved in the baseline.

Typical workflow:

1. A project is planned, leveled and published. A baseline is saved at this point. Because this project has just been leveled and no actual time has been entered against it, this projected schedule baseline is equal to the plan and is effectively a snapshot of the original plan.
2. As time and ETCs are entered, the project's projected schedule will likely vary from the original plan. Saving a new baseline establishes a reference point for comparison against the original plan or against future points in the project's progress.
3. The project plan is modified, leveled and republished. Saving a baseline at this point creates a snapshot of the new projected schedule.

How to access baselines?

Click the **Progress** button  on the Project Scheduling view's toolbar.

How do I save a baseline?

Remember: Saving a baseline saves the information that is displayed in orange: the **projected** estimates and timelines.

To save a named baseline:

1. Check that Projected Schedule is selected in the orange drop-down.
2. Click the Save button.
3. Enter a name for the baseline and click OK. The name should be descriptive, such as a milestone/phase name or a date.

How do I compare 2 saved baselines?

In this example, a project's original plan is shown in **blue** and the updated plan is shown in **orange**.

Definitions:

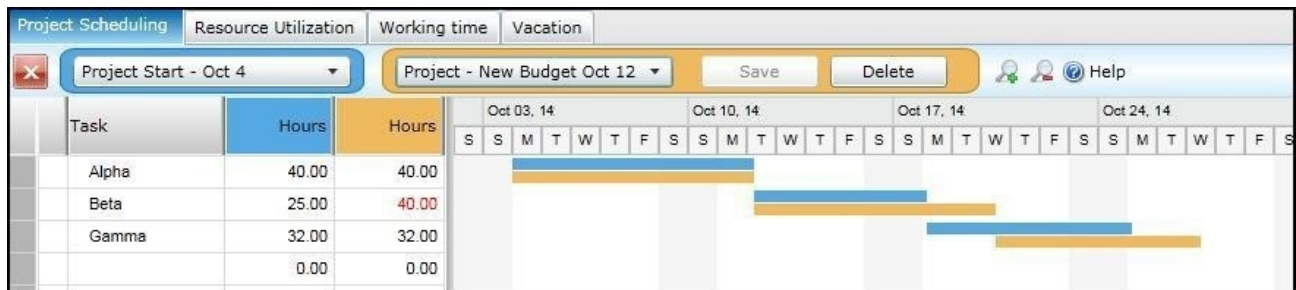
Start - Oct 4 = The project's original plan (budgeted hours and timeline) when the baseline was saved.

New Budget Oct 12 = The project's updated plan.

In the following example,

- Task Alpha's work budget is 40 hours for both the original and modified plans.
- Task Beta's work budget is 25 hours for the original plan and 40 hours for the updated plan.
- Task Gamma's work budget is 32 hours for both plans.

The updated project is now projected to finish 2 days later than the original plan (October 27th instead of October 25th). This is because Task Beta will take longer to finish.



At the bottom of the view, **statistics** and a **project summary** are provided.



How do I delete a baseline?

1. Select the baseline to delete in the orange drop-down list.
2. Click the Delete button near the top of the screen.

Note: When a task is deleted from a project plan, it is removed from all baselines. This is why it is best not to delete a task from a project.

Miscellaneous information

Project Statistics

Project Statistics are available in the Project Scheduling view by clicking anywhere in the lower left corner. If enabled, the currency displayed in the Project Statistics can be changed using the Currency drop-down list in the Project Scheduling view.

Project Statistics			
Tasks count:	4	Resources used:	4
Unassigned Tasks:	0	Finish date:	Jun 30, 2014
Budgeted hours:	1,650.00	Actual hours:	151.75
Budgeted Company Cost:	USD \$90,750.00	Actual Company Cost:	USD \$5,311.25
Budgeted Client Cost:	USD \$57,750.00	Actual Client Cost:	USD \$8,346.25

Close

Finish Date: The finish date is defined by the current plan. This is the planned finish date and does not reflect forecasted changes due to actual hours or ETCs entered by employees. The Project Planning tool does not automatically adjust the current plan based on actuals. Forecasted timelines can be seen using the Progress view.

Example:

An employee enters more time against a task than budgeted in the current plan. This 'longer' task may alter the project's finish date and budgeted costs. These changes are not reflected in the project statistics because the current plan is never automatically adjusted.

Budgeted hours, Budgeted Company Cost and Budgeted Client Cost: These reflect the current plan and do not reflect forecasted changes for the same reasons as described above.

Actual hours, Actual Company Cost and Actual Client Cost: These reflect the hours and costs based on approved time entered by employees.

Review Client and Company Costs (page 147) for details on how these are calculated.

Saving and Opening Projects

The following describes the options when creating, saving or opening a project using the Project Planning tool. Finalizing and making a Project Planning tool project available for time entry is referred to as publishing, and is detailed in Publishing a Project (page 19).





New : Creates a new project and an empty workspace.


When opening a new project, you have the following options:


- Assign the project to a client. You do not need to assign a client to a project if your company does not bill clients or does not charge back to business units. You can assign the project to a client at any time.


- Adjust the project's start date. By default, today's date is selected.
- Establish another person as the Manager (for reporting purposes only).
- If enabled, select a **Currency** for this project. This is the currency in which costs are viewed when the 'Display by Project Currency' option is selected in the upper right corner of many views. It is also the currency used for the project when using the Billing view to create an invoice.
- If enabled, set the **Budget exchange rate date**. This is set to prevent a project's **budgeted costs** from automatically changing when currency exchange rates are modified. The currency exchange rates from the date set in this field are used when viewing budgeted costs in other currencies. It's important to highlight that this locks the currency exchange rates for budgeted costs only. Actual costs are calculated using the exchange rates for the day that time is actually entered.

Note that these options can also be modified using the Project properties button  on the toolbar.

Save : Saving a project saves the assignments and other scheduling changes or additions made to the project. If changes were made and saved for a project previously published, the changes are not yet made available. New projects, or changes to an existing project, only become available for time tracking when the project is published.

Once saved, the Project Planning tool project is displayed in the Project Assignments view and can be identified by a small orange circle in the project icon .

Save As : Saves a copy of the project using a new name.

Open : Permits a user to open an existing Project Planning tool project. You can also open and convert an existing Timesheet project (a project created from the Project Assignments view), or open and convert a project imported from Microsoft Project. This function is detailed in Importing a project (next section).

If you use Limited Access, this must be set using this project's complete set of properties available from the Project Assignments view. This is also where the project's Billable defaults, Hide Tasks, etc., options are set.

Tip: You can sort the list of projects by name, published status, etc., by clicking on any of the column headers in the list. You can also use the Find box to locate a specific project by name.

Notes:

- When the Project Scheduling view is accessed for the first time, a new project is automatically opened. When returning to the Project Planning tool, the previously opened project is re-opened.
- Limited Access security settings are used to filter the list of projects displayed in the Open Project pop-up.
- When you have a project opened, another user may open it and gain control over the project. In this case, any changes you make cannot be saved to the original file name.

Importing a project into the Project Planning tool


The Project Planning tool allows you to import and convert a project built in the Project Assignments view into a Project Planning tool project. You can also import and convert a project originally created using Microsoft Project.

Once the project is imported, converted and published, the project becomes property of the Project Planning tool. This means that any changes to assignments, budgeted hours and costs can only be done using the Project Planning tool. A converted project remains visible in the Project Assignments view for general reporting purposes and is available to edit some project properties such as security, billable options, etc.

When importing an active Project Assignments view project, actual hours already entered against it are visible in the Project Scheduling view.

Note: Until the Publish feature is used, a Project Assignments view project opened in the Project Planning tool can be reverted back to a Project Assignments view project. From the Project Assignments view, right click on the project name and select **Revert from Planning**.

Convert a Project Assignments view project into a Project Planning tool project:

1. Click the **Open Project** button  on the Project Scheduling view's toolbar.
2. Select the **Convert an existing project** option.
3. **Select the project** from the list.
4. (Optional) Check the **'Keep existing budget dates'** box to keep any assignment dates already established for the project.
5. Click **Open**.

Note: If tasks appear in the task list but there are no corresponding timeline bars or assignments in the Gantt area, this means that the imported task assignments do not have any budgeted hours. When you enter 'hours' for a task, it appears in the Gantt area.

6. Make assignment changes as necessary, level and then publish when ready.

Notes:

- All imported task and task group assignments are converted into unique assignments for the Project Planning tool project. Example: A task called 'Meeting' is assigned to all projects built in the Project Assignments view. When one of those projects is converted to a Project Planning tool project, the imported 'Meeting' task is no longer linked to its original source (the 'Meeting' task created in the Project Assignments view). Any changes made to the original 'Meeting' task's properties, such as description, prorating, etc., are not passed on to the converted project's 'Meeting' task. Also, when a general 'Task' report is run, the converted 'Meeting' task will not be considered in the data returned.
- The built-in Leave/Absences project cannot be imported and converted into a Project Planning tool project.

Tip: You have the option to only view Unfinished projects using the drop-down filter next to the Convert option. This option removes, from the list, all projects that have a status of Finished, Terminated or Rejected.

Convert a Microsoft Project project into a Project Planning tool project:

Warning: Converting a Microsoft Project project breaks the link to Microsoft Project and you will no longer be able to send time for this project to Microsoft Project.

The Microsoft Project project must first have been imported into Dovico Planning & Timesheet using the Microsoft Project Integration tool (page 261).

1. Click the **Open Project** button  on the Project Scheduling view's toolbar.
2. Select the **Convert an existing project** option.

3. **Select the Microsoft Project project** from the list.
4. **(Optional)** Check the **'Keep existing budget dates'** box to keep any assignment dates already established for the project.
5. Click **Open**.
6. Make assignment changes as necessary, level and then publish when ready.

How Project Planning projects are different from Project Assignments view projects


Projects and tasks can be created in 2 areas within Dovico Planning & Timesheet. They can be created from the Project Planning tool and from the Project Assignments view. Although projects from each area are similarly structured, there are important differences with respect to managers and administrative users. For time entry users, there are no differences.

Projects:

- You create a **project using the Project Assignments view** if the project does not need a schedule or budget. These are normally administrative tasks that are "Support" or "Administrative" type work, where it is important to keep track of time and costs, but not necessary to schedule and plan the work. It's important to note that you can always convert a project created in the Project Assignments view into a Project Planning tool project.
- You create a **project using the Project Planning tool** if you have a need to accurately plan a project's schedule and costs based on available resources. You also use the Project Planning tool to create projects that require accurate tracking against budgeted time and costs while the project is in progress.

Once you've decided which tool to use to create the project, there are other practical differences to note.

In general, a project created in the Project Planning tool can only be edited using the Project Planning tool. The project is displayed in the Project Assignments view and in other key areas of the software, but normally only for reporting and tracking purposes. For managers and administrators, this means that normal project editing functions, such as modifying assignments, editing budgets, etc., is only permitted using the Project Planning tool. For employees, who only track time against the project, there are no differences between projects created in the Project Planning tool and projects created in the Project Assignments view.

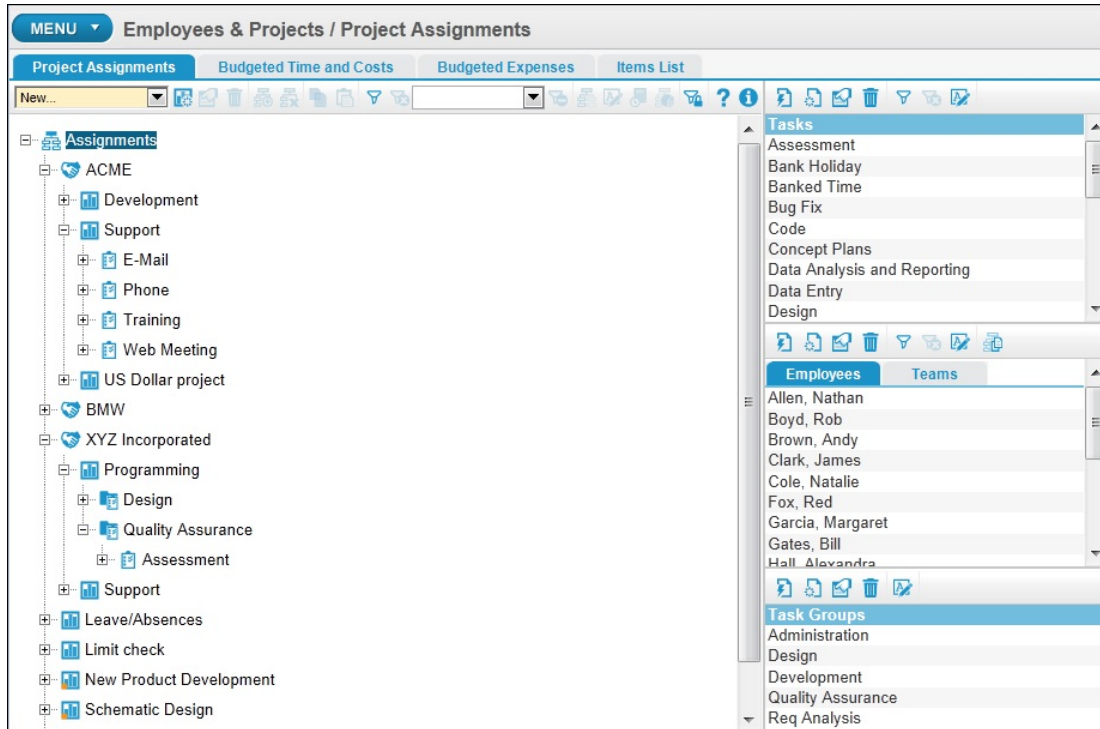
Project Planning tool projects can be identified in the Project Assignments view by a small orange circle in the project icon .

Tasks:

- A task created in the **Project Assignments view** has limitations relating to how it is assigned to projects. A task created in the Project Assignments view can be assigned to multiple projects but can only be assigned to each project once. When reporting on a Project Assignments view task, time data against all Project Assignments view projects is returned.
- A task created in the **Project Planning tool** is unique to the project it is created for. You can have a task called 'Design' for Project Planning project A and have another task called 'Design' for Project Planning project B. These identically named tasks are in fact only superficially the same as the software uses a combination of project, task and other properties to create a unique identification. This even permits the same task name to be used multiple times in one project.

Employees & Projects - Overview

The **Employees & Projects** area in the software is used to create projects that do not need a schedule or a budget. These are normally administrative type projects where it is important to keep track of time and costs, but there is no need to schedule and plan the activities. If there is a requirement to plan the project's schedule/timeline and costs based on available resources, then the Project Planning section of the software should be used to create this project.



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Clients

In Dovico Planning & 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. Any project within the database can be associated to a specific client and multiple projects can be associated to the same client.

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

From 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 51).

Prerequisite:

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

OPTION A: To add a client with detailed information:

1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
2. Select **New Client (Details)** in the drop-down list at the upper left corner of the view.

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. You have the option to modify the client abbreviation (up to 20 characters). If modifying the abbreviation, be sure to add a hyphen "-" at the end. The client abbreviation must be unique.
5. (**Optional**) If you are creating invoices for this client using the Billing view, click the Address tab at the bottom of the client properties window and enter the address information that will appear 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 220).
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 **Flag for archive** box if you want to remove this client from the database the next time the Archive Database function is run.
11. Click **Done** to save the information and close the window.

Notes:

- The client 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 in alphabetical order.
- If the **Create project for each new client** option is enabled (in Database Options, page 207), a project (with the same name as the client) is automatically created and displayed under the client in the Project Assignments view.
- 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. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
2. To quickly create a new client, select **New Client** in the drop-down list at the upper left corner of the view.
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.

Note about using Quick Add: Using this option (quick add) to add a client does not force you to enter information in required custom fields.

To add a client using the Items List view:

1. Select **Items List** from the menu (Menu > Views tab > Employees & Projects > Items List).
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 50).
5. Click **Done** to 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 202). You may need to click the **paging** buttons  or  (at the top of the screen) to view additional pages.

Tip: Use the **Show/Hide column**  function to personalize what information is displayed in the client list view's grid.

Projects

Projects are the combined endeavors undertaken to create a unique product, service or result. A project is a mandatory 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, Approved Expenses, time entry screen, etc.) as an optional or mandatory selection.

The Project Assignments view is the area in the software used to create projects that do not need a schedule or a budget. These are normally administrative type projects where it is important to keep track of time and costs, but there is no need to schedule and plan the work. If there is a requirement to plan the project's schedule/timeline and costs based on available resources, then the Project Planning section of the software (page 12) should be used to create this project.

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**.


From the Project Assignments view, projects can also be added using the Project Items List view (page 55).

Prerequisites:

- **Clients** should first be established if time or expenses associated with projects are billable.
- **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. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).

2. In the tree structure on the left, click on the **client**  associated with the new project.

OR click the root **Assignments**  icon if the new project has no client.

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 software. A client can always be associated to a project at a later time.

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

A **project properties** window opens.

4. 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.



5. Click **Done** to save the information and close the window.

OPTIONAL INSTRUCTIONS:

6. Select an employee from the **Manager** drop-down list. The manager field is used for reporting purposes only.

7. From the **Limited Access** field, select which managers or Access Groups can access this project. Only the selected managers (or members of the selected access groups) are permitted to view and report on this project.

Depending on which limited access operating mode is enabled, either a list of manager names or a hierarchical tree of access groups is displayed in the limited access drop-down list. See **Notes** below.

- Check the managers (or access groups) who require access to this item. Click the 'check all' icon  to select all. Clicking the 'unselect all' icon  removes all check marks except for one

manager (or one access group). This is to guarantee that at least one person can access the item.

- Click anywhere outside the Limited Access window to close the list.

Notes:

- If the Limited Access list displays user names then Manager-level limited access mode is likely enabled (page 229). Otherwise, Hierarchy-based limited access mode is likely enabled (page 235).
- When an access group is checked, any parent access group is automatically checked.

8. Select a **Project Status** from the drop-down list. The status determines whether the project is available for time entry or if it is only available for reporting and general information purposes. See page 55 for more information on Project Status.
9. Check the **Freeze budget costs** option to lock down the employee pay and billing rates applied to this project. This option was designed to prevent an active project's budgeted costs to be automatically updated whenever an employee's rate is modified. When applied, whenever an employee's Rate of Wages or Rate Charged value is changed, the revised rates are not automatically applied to this project's budgeted costs. However, with this option enabled, it remains possible for rates to be manually adjusted or Estimated hours to be adjusted using the Budgeted Time & Costs view.
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 the fixed amount entered here. 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 on the project. When an invoice is created, you have the option to include 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 Fixed Cost details area is displayed below allowing you to enter one or more fixed costs for this project. Each fixed cost entry is then available for invoicing in the Billing view. Enter an Amount, Start/End date and Description. The Start/End date and Description fields are used for reporting purposes only. The Amount should include any applicable taxes. If Currencies have been enabled, the Fixed cost value should be entered in the same currency as selected in the next step (step 12), and enter a Budget exchange rate date for the amount (see step 13).

Tip: Instead of using the individual employee pay and billing rates to calculate a particular project's budgeted costs, you can apply a common (project-based) billing rate against the project's estimates by using the Budgeted Time and Costs view's budget wizard (page 143).

12. If enabled, select a **Currency** for this project. This is the currency in which costs are viewed when the 'Display by Project Currency' option is selected in the upper right corner of many views. It is also the currency used for the project when using the Billing view to create an invoice.
13. If enabled, set the **Budget exchange rate date**. This is set to prevent a project's **budgeted costs** from automatically changing when currency exchange rates are modified. The currency exchange rates from the date set in this field are used when viewing budgeted costs in other currencies. The date field cannot be set to a future date. It's important to highlight that this locks the currency exchange rates for budgeted costs only. Actual costs are calculated using the exchange rates for the date that the time is entered.
14. Modify the **Start and End dates** for the project. These dates are used for reporting purposes only.
15. Enter a **Description** for the project (up to 250 characters). This project description is available to the employees entering time on this project.
16. 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.
17. **Linked to:** When applicable, this field displays the path link for this project to Microsoft Project.
18. The **Default Options** area specifies if all future time or expense entries relating to this project automatically appear with their billable option checked or unchecked. For example, if 'Time entries

billable by default' is checked, an employee entering time against this project will have the billable option pre-checked. Check or uncheck 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.

19. The **Task Assignments** section is designed to control when a task assignment is displayed to the assigned employee. When checked, each task assignment's Start and Finish dates are used to determine when the assignment is shown to the employee. When un-checked, this project's assignments are always available to the employees. Task assignment's scheduled Start and Finish dates are established in the Project Planning tool or in the Budgeted Time & Costs view. See **Only Display Scheduled Assignments** (page 81) 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.

20. 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.

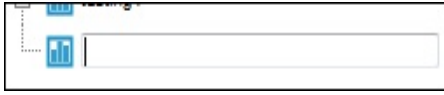
Note: A new project created in the Project Assignments view remains at the bottom of the assignment tree until the screen is refreshed. When refreshed, the new project is displayed in alphabetical order.

Tips:

- You can add a new project by right clicking in the assignment tree pane.
- Use the **Limited Access Group** filter  (page 258) to only view those items assigned to specific Access Groups.
- The term 'Project' can also be **customized** to better fit your company's terminology.

OPTION B: To quickly add a project:


1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
2. In the tree structure on the left, click on the **client**  associated with the new project.
OR click the root **Assignments**  icon if the new project has no client.
3. Select **New Project** in the drop-down list at the upper left corner of the view.
4. 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 is displayed under that client. Enter a unique project **name** (up to 250 characters).





5. 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 you to enter information in any required custom fields that may have been created for projects.

Add a project using the Items List view:

1. Select **Items List** from the menu (Menu > Views tab > Employees & Projects > Items List).
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 52).
5. Click **Done** to save the information and close the window, or click **New** to save this information and create a new project.

Note: The number of projects displayed in the view is limited by the **Paging** setting (page 202). 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.

Project Status

The **Project Status** defines the current state of a project. The status determines whether the project is available for time entry and whether it's estimated hours or ETC can be adjusted.

- **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 displayed to time entry users.
- **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. **Note:** A Project Planning tool project set to Active can still have its estimated hours modified.
- **Rejected, Terminated** or **Finished:** When set to any of these options, 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.

Tasks

Tasks are activities or work efforts against which employees track their time. Tasks are mandatory 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.

Special note about the different types of tasks in Dovico Planning & Timesheet:

Projects/tasks created directly in the **Project Assignments** view are the types of projects and tasks that require accurate tracking for time and costs, but do not need to be scheduled for a certain date, or scheduled based on other work being completed (dependencies). The tasks created in the Project Assignments view are normally administrative or 'on-going' projects and tasks.

The **Project Planning tool** is the area of the software where you create projects/tasks that need to be scheduled based on resource availability, dates or dependency related factors. Although both called tasks, tasks created for the Project Planning area of the software have technical differences for managers and administrative users when it comes to assignments and reporting. For time entry users, there are no differences.

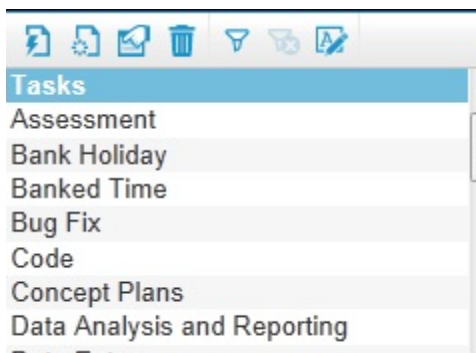
In general terms, tasks created in the Project Planning tool are not available in the Project Assignments view and vice versa. They may appear in the Project Assignments view when viewing assignments, but they cannot be edited in any way.


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

From the Project Assignments view, tasks can also be added using the Tasks Items List view (page 58).

To add a task:

1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
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 save the information and close the window, or click **New** to save this information and create a new task.



OPTIONAL INSTRUCTIONS:

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

The **More** button can be ignored when you are creating a new Task. The More button is used when you are changing the 'Group by' selection for an existing task and you want to backdate assignments already made using the task group. See page 60 for details.

- From the **Limited Access** field, select which managers or Access Groups can access this task. Only the selected managers (or members of the selected access groups) are permitted to view and report on this task.

Depending on which limited access operating mode is enabled, either a list of manager names or a hierarchical tree of access groups is displayed in the limited access drop-down list. See **Notes** below.

- Check the managers (or access groups) who require access to this item. Click the 'check all' icon  to select all. Clicking the 'unselect all' icon  removes all check marks except for one manager (or one access group). This is to guarantee that at least one person can access the item.
- Click anywhere outside the Limited Access window to close the list.

Notes:

- If the Limited Access list displays user names, then Manager-level limited access mode is likely enabled (page 229). Otherwise, Hierarchy-based limited access mode is likely enabled (page 235).
- When an access group is checked, any parent access group is automatically checked.

- Enter a **Description** for the task (up to 250 characters). This description can be seen by those entering time against this task as the Task Description. The task description is also used as the default entry for the Time Entry Description field in the time entry tool, and can be modified by the employee for each time entry.

(**Optional**) Check the **Required for time entry** box to force the user to enter a Time Entry Description when entering time against this task. With this option checked, the task's description is not entered as the default Time Entry Description as described above.

Tip: When using the 'Required' option described above, you should remove the ability from users to hide the Time Entry Description field (see Timesheet Options on page 204).



- Enter a **Prorating** for this task. The prorating value is used to assign a proportionate value to this task when billing clients on time entered against this task. See **Proratings** on page 60 for a detailed explanation of how proratings are used in calculating client costs. When editing a prorating, a 'More' button is displayed to offer more options. When creating a new task prorating, this button can be ignored.

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 is calculated as follows: \$100 x 2 x the number of billable hours worked.


- 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.
- 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.
- Click **Done** to 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. This can be a problem if you ever need to run time reports on projects that used this task. Instead, consider using the **Archive** function as it will effectively accomplish the same as delete, but the task and all associated information will be stored in a separate, archive database.

Tips:




- Use the **Filter** function  to view only those tasks assigned to a specific task group.
- You can add a new task by right clicking in the task list pane.
- You can add fields to track extra task information by using **Custom fields**.
- Use the **Limited Access Group filter**  (page 258) to only view those items assigned to specific Access Groups.
- The term 'Task' can also be **customized** to better fit your company's terminology.

To add a task using the Items List view:

1. Select **Items List** from the menu (Menu > Views tab > Employees & Projects > Items List).
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 56).
5. Click **Done** to save the information and close the window, or click **New** to save this information and create a new task.

Note: The number of tasks displayed in the view is limited by the **Paging** setting (page 202). You may need to click the **paging** buttons  or  (at the top of the screen) to view additional pages.

Tips for the Items List view:

- 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.
- Use the **Filter** function  to view only those tasks assigned to a specific task group.

Prorating

Because the software does not permit pay and billing rates to be applied at the task level, proratings are available for the situations when the type of work being performed can be billed at different rates.

Proratings are variables assigned to **tasks** (page 56) and **overtime rates** (page 160) used in calculating client costs (billing 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:

$$\$100 \text{ rate charged} \times 1.25 \text{ task prorating} \times 2 \text{ hours} = \$250.$$

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 Project Planning tool or Budgeted Time & Cost view (see 2 to 4 below). The new value can also be applied to approved time entries using the More button, which appears next to the Prorating field.
2. **Budgeted Time & Cost**: When you edit the task from this view, the new value will only be applied to future time entries on the specific project/task assignments selected.
3. **Project Planning**: When you edit an assignment's task prorating from this view, the new value will only be applied to future time entries on the specific assignments selected.
4. **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.
5. **Actual Time & Costs**: When you edit the task prorating from this view, the new value will only be applied to the approved time entries selected.

If a project has its Freeze budget costs option selected, then task prorating changes will not be applied to the project.

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:

$$\$100 \text{ rate charged} \times 1.25 \text{ task prorating} \times 2 \text{ hours} \times 1.5 \text{ overtime prorating} = \$375.$$

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. The new value can also be applied to approved time entries using the More button, which appears next to the Prorating field.
2. **Actual Time & Costs**: When you edit an overtime prorating from this view, the new value will only be applied to the approved time entries selected.

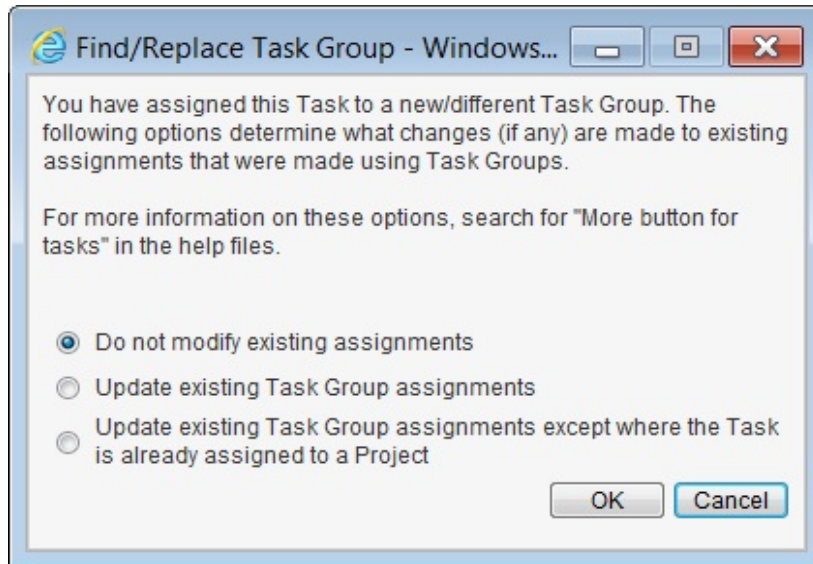
If a project has its Freeze budget costs option selected, then overtime prorating changes will not be applied to the project.

'More' button for Tasks

Because a task cannot belong to more than one task group, complications can arise if you have made task assignments using task groups and then you decide to change which task groups a task is associated with. The More button assists by offering 3 options that determine what changes, if any, are made to assignments already made to projects using task groups.

If you have not made assignments using Task Groups then the More button options can be ignored.

The following highlights the 3 available options. Further details are available from the software's help system launched from the toolbar .



Option 1: Do not modify existing assignments

No changes are made to existing projects where this task group was assigned. The next time this task group is assigned to a project, the task will appear within the task group.

Option 2: Update existing Task Group assignments

The task will be assigned to every project where the task group was previously assigned. If this task was already assigned to a project, the task assignment will be moved to the task group.

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

The task will be assigned to every project where the task group was previously assigned unless the task was already 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.


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 also be added using the Task Groups Items List view (page 62). Task Groups created in this view are not available for use in the Project Planning tool.

To add a task group:

1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
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 save the information and close the window, or click **New** to save this information and create a new task group.

OPTIONAL INSTRUCTIONS:

6. From the Limited Access field, select which managers or Access Groups can access this task group. Only the selected managers (or members of the selected access groups) are permitted to view and report on this task group.

Depending on which limited access operating mode is enabled, either a list of manager names or a hierarchical tree of access groups is displayed in the limited access drop-down list. See **Notes** below.


- Check the managers (or access groups) who require access to this item. Click the 'check all' icon  to select all. Clicking the 'unselect all' icon  removes all check marks except for one manager (or one access group). This is to guarantee that at least one person can access the item.
- Click anywhere outside the Limited Access window to close the list.

Notes:

- If the Limited Access list displays user names, then Manager-level limited access mode is likely enabled (page 229). Otherwise, Hierarchy-based limited access mode is likely enabled (page 235).
- When an access group is checked, any parent access group is automatically checked.


7. Enter a **Description** for the task group (up to 250 characters).
8. 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.
9. Click **Done** to save the information and close the window, or click **New** to save this information and create a new task group.



Tips:

- You can add a new task group by right clicking in the task group list pane.
- You can add fields to track extra task group information by using **Custom fields**.
- Use the **Limited Access Group** filter  (page 258) to only view those items assigned to specific Access Groups.

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.

To add a task group using the Items List view:

1. Select **Items List** from the menu (Menu > Views tab > Employees & Projects > Items List).
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 61).
5. Click **Done** to save the information and close the window, or click **New** to save this information and create a new task group.

Note: The number of task groups displayed in the view is limited by the **Paging** setting (page 202). You may need to click the **paging** buttons  or  (at the top of the screen) to view additional pages.

Employees

Anyone who enters time and expenses, or who manages, monitors or reports on project activities is considered an **Employee**. What differentiates someone who simply tracks their own time versus the individual who administrates the entire software are the details in their respective employee profiles. For each employee, the profile stores the user's id, password, security level, their pay/charge out rates and many more useful details. An employee profile must be created for each individual using the software.

The **Employees** list pane in the Project Assignments view is the location where employees using the software are listed, added or edited. Employees are also displayed in multiple views (Project Planning tool, 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 (2) how to enter Leave/Absences information for the employee.

Note about adding employees:

Employees can also be imported into the database using .csv files with our **Import/Export** app. You can also use our **Active Directory** or **Microsoft Project** views to import employees. You should consider using these options if you are planning to use either of these integration tools now, or in the future. All of these options are detailed in the Integration section beginning on page 260.

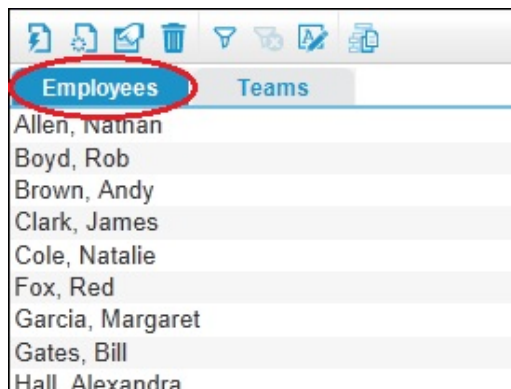
Employees can also be added using the Employees Items List view (page 68).

Prerequisites:


- **Teams** should first be established if you are planning to group employees in a team, department or division.
- **Leave/Absences** rules should first be established if you are using the software to accrue vacation, sick leave or other types of leave for employees.

To add an employee:



1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
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** and **First names** (up to 100 characters each).
5. Enter the employee's **Email** address and **Password (case sensitive)**, up to 100 characters each. If 'Strong Password' has been enabled by your administrator, the password is required to contain at least 8 characters, contain at least 3 of the following character types - uppercase letter, lowercase letter, number or special character, and cannot contain the User ID. Employees are able to change their own passwords using an option within the Time Entry screen (some exceptions apply).

6. (Optional) Select a **Team**  from the drop-down list. If necessary, select an alternate **Effective Date**.
7. Select a **Security level** from the drop-down list. The security level restricts access to different views. See Pre-defined Security Groups (page 225) for a detailed description of the default security groups.
 - **Administrator**: Employees assigned to this security level can edit, add, delete and view information in every part of the software.
 - **Manager**: Employees assigned to this security level can edit, add, delete and view information from many administrative views.
 - **Time and Expense entry**: Employees assigned to this security level only have access to time & expense entry. Access to administrative functions is denied.
 - **Team Lead**: Employees assigned to this security level can edit, add, delete and view information in only a limited number of administrative views.
 - **Auditor**: Employees assigned to this security level can only view and export report information from the Reports section of the software (Reports). All other software options and views are inaccessible.
8. Select the **Software access** level for this employee from the drop-down list:
 - **[None]**: This employee cannot login to the software.
 - **[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/expense entry views.
9. From the **Limited Access** field, select which managers or Access Groups can access this employee. Only the selected managers (or members of the selected access groups) are permitted to view and report on this employee.

Depending on which limited access operating mode is enabled, either a list of manager names or a hierarchical tree of access groups is displayed in the limited access drop-down list. See **Notes** below.

- Check the managers (or access groups) who require access to this item. Click the 'check all' icon  to select all. Clicking the 'unselect all' icon  removes all check marks except for one manager (or one access group). This is to guarantee that at least one person can access the item.
- Click anywhere outside the Limited Access window to close the list.

Notes:

- If the Limited Access list displays user names, then Manager-level limited access mode is likely enabled (page 229). Otherwise, Hierarchy-based limited access mode is likely enabled (page 235).
- When an access group is checked, any parent access group is automatically checked.

Steps 10 through 12 detail Employee Rates

Background: 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 - proceed to step 13.

- **Rate of wages** (pay rate): The employee's hourly paid salary plus benefits used to calculate company costs.
Company cost = hours worked x rate of wages x overtime prorating
- **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 Rate charged is not needed.

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

10. Enter the hourly **Rate of wages** value.

- If enabled, select the currency for this rate. For example, 16.50 GBP or 25.00 USD. The currency selection is used when employees are paid in different currencies and there is a requirement to administer, compare and review these costs in any currency.

Note: Ignore the **More** button if you are creating a new Employee. The "More" button (page 83) is used when editing an existing Employee's Rate of wages, Rate charged or Currency and you want to backdate existing time and expense entries that used this value.

Warning: If modifying an employee's Currency selection, the rate value should be adjusted accordingly. Example, if modifying an employee pay rate from 30.00 USD to British Pound (GBP), the rate value should be changed to 18.00 GBP. Otherwise calculated costs for existing time and existing budgets could be affected dramatically.

11. Enter the hourly **Rate charged** value.

- If enabled, select the currency for this rate.

12. (**Optional**) For each rate value described above, select one or more overtime rate options located below the rate value field. Overtime rates apply a prorating (multiplier) to the employee's time entry when there is a requirement to pay/charge out a different hourly rate in special circumstances. For example, 'Time and ½' or 'Holiday Premium'. The Overtime rates selected here are displayed in the employee's time entry tool as an option when entering time.

13. Select a **Start** and **End date** for the employee.

14. (**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.


15. Click **Done** to automatically save the information and close the window, or click **New** to save the information and create a new employee.

The employee profile is now created but there are a few other things to do or check before the employee can begin tracking time.

- **Assign projects and tasks** for the new employee.
- Add the new employee to any applicable **Approval** workflows.
- Review **Assignment Budgets** (Budgeted Time and Costs) for the new employee.
- Add the employee to relevant **scheduled reporting or notification** jobs (Job Scheduler).
- Use the **Timesheet Options** view to customize the employee's time and expense entry screens.
- Review the employee's **Working Time** and **Vacation** settings in the Project Planning tool.
- Send the new employee the company (database) name, his/her User ID, Password and the URL to login to the software.
- **Train** the employee how to use the software to enter time and expenses (or use our On Demand Training: http://www.dovico.com/web_timesheet.aspx).

To specify additional employee settings:

The employee properties window's **Additional tab** permits **Leave/Absences rules** and **Instant Email Notifications** to be assigned to each employee. It also permits the employee's approval workflows for submitted time and expenses to be reviewed.

1. Select the **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.

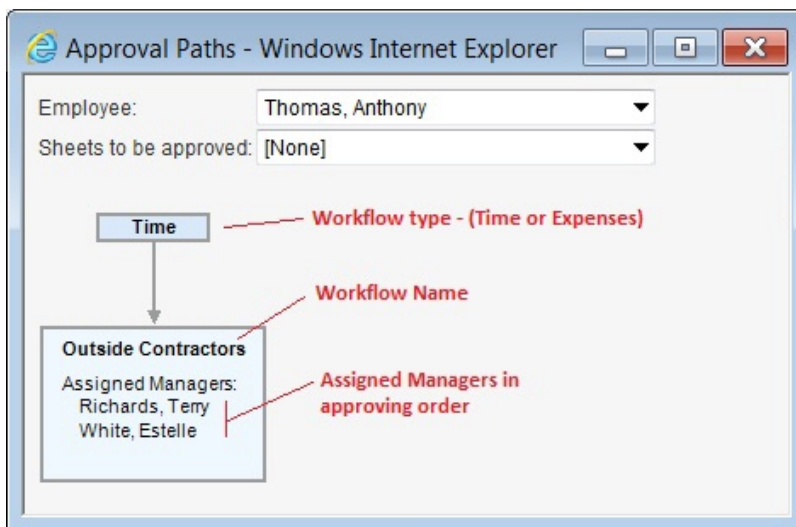
Reviewing approval workflows for the employee

When an approval workflow is assigned to an employee, that employee's submitted timesheets are automatically forwarded to the manager designated in the approval workflow. Employees can be assigned to a Timesheet Approval workflow and/or an Expense Approval workflow. Approval workflows are assigned through the Approvals tab (page 88) in the Approval Workspace view.

- a. Click the **Show Employee Workflows** link near the top of the window.

The Show Approval Paths window opens.

- b. Details on the information displayed are found on page 94.
- c. The employee is selected automatically. You can select others using the 'Employee' drop-down list at the top of the window.
- d. You can review any active sheets awaiting approval using the 'Sheets to be approved' drop-down list.



Entering leave/absences information and assigning accrual rules

In this step, an employee number and the number of hours the employee works per day are established. Leave/Absences rules, which 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 to the original rule are lost (see step 'e' below).

- a. Enter an **Employee Number** if applicable. This field is for information purposes only.
- b. Select a **Leave/Absences rule** from the **Rule** drop-down list.
- c. **Working hours** is the number of hours that the employee works per day. The Working hours per day data is used by the Project Planning tool to schedule work and is used when employee accruals are calculated on a daily basis (see Leave/Absences rules, page 193). Note that Working Hours can also be set using the Working Time tab in the Project Planning tool.
- d. The **Work days** are the days of the week the employee works. Work Days are only required if planning projects using the Project Planning tool. These are set using the Working Time tab in the Project Planning tool (page 33).
- 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.

Leave/Absences	
Employee number:	5648-96
Leave/Absences rule:	Employees with 3-5 years se ▼
Working hours:	7.50 per day
Work days:	.MTWTF.
Accrual Information	
0.00 available hours left for Vacation starting from Thursday, January 01, 2015	
0.00 available hours left for Sick Time starting from Thursday, January 01, 2015	

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 (setup 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 that 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 that 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 165) that 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 179) for complete instructions on modifying the e-mail text.
- c. Click **Done** to automatically save the information and close the window.

Notes:


- 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 that have been 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 as it will effectively accomplish the same as delete, but the employee and all associated information will be stored in a separate, archive database.

Tips:





- The term 'Employee' or 'Rate' can be customized to better fit your company's terminology.
- 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 the software, 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 **Limited Access Group** filter  (page 258) to only view those items assigned to specific Access Groups.
- Use the **Copy Employee Assignment**  function to copy one employee's assignment to one or more other employees.
- The default selections displayed for Instant E-mail Notifications can be changed using the Notifications tab in the Database Options view (page 212).
- You can modify the Instant E-mail Notification option for multiple employees by using the Update Employee Properties view (page 219).

To add an employee using the Items List view

1. Select **Items List** from the menu (Menu > Views tab > Employees & Projects > Items List).
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 63).
5. Click **Done** to automatically save the information and close the window, or click **New** to save this information and create a new employee.

Note: The number of employees displayed in the view is limited by the **Paging** setting (page 202). 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.
- Use the **Filter** function  to only view those employees assigned to a specific team, security level, etc.
- Use the **Limited Access Group** filter  (page 258) to only view those items assigned to specific Access Groups.

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. Any employee can be assigned to a team.

The following describes how to **add a team** using the Project Assignments view. Teams can also be added using the Teams Items List view (page 70).

To add a team:

1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
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 save the information and close the window, or click **New** to save this information and create a new team.

OPTIONAL INSTRUCTIONS:

6. From the Limited Access field, select which managers or Access Groups can access this team. Only the selected managers (or members of the selected access groups) are permitted to view and report on this team.

Depending on which limited access operating mode is enabled, a list of managers or a hierarchy tree of access groups is displayed in the limited access drop-down list. See **Notes** below.

- Check the managers (or access groups) who require access to this item. Click the 'check all' icon  to select all. Clicking the 'unselect all' icon  removes all check marks except for one manager (or one access group). This is to guarantee that at least one person can access the item.
- Click anywhere outside the Limited Access window to close the list.

Notes:


- If the Limited Access list displays user names, then Manager-level limited access mode is likely enabled (page 229). Otherwise, Hierarchy-based limited access mode is likely enabled (page 235).
- When an access group is checked, any parent access group is automatically checked.

7. Enter a **Description** for the team (up to 250 characters).


8. 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.
9. Click **Done** to save the information and close the window, or click **New** to save this 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** .

To add a team using the Items List view:

1. Select **Items List** from the menu (Menu > Views tab > Employees & Projects > Items List).
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 69).
5. Click **Done** to automatically save the information and close the window, or click **New** to save this information and create a new team.

Note: The number of teams displayed in the view is limited by the **Paging** setting (page 202). You may need to click the **paging** buttons  or  (at the top of the screen) to view additional pages.

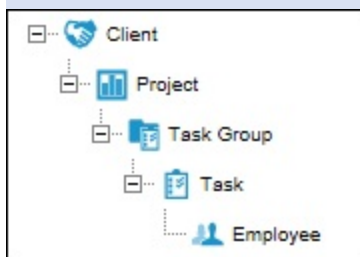
Assignments

In Dovico Planning & 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 for the Employees & Projects area of the software. Assignments made in this view appear in the software'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 85).

Important Tip:

- Before creating or editing any assignments, check the various toolbars to see if any filters  or  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.

Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).

Assign using Drag and Drop

Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).

To assign tasks to projects:

1. In the assignment tree, locate and select the **project** to which you want to assign tasks.
2. Select one or more tasks from the task pane on the right.
3. Drag and drop the task(s) on top of the project's name in the assignment tree.

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

To assign employees to tasks:

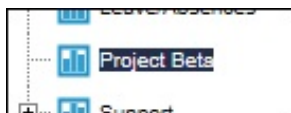
1. Locate and select the **task** in the assignment tree.
2. Select one or more employees from the employee pane on the right.
3. Drag and drop the employee(s) on top of the task's name in the assignment tree.


Assign using the Assign button

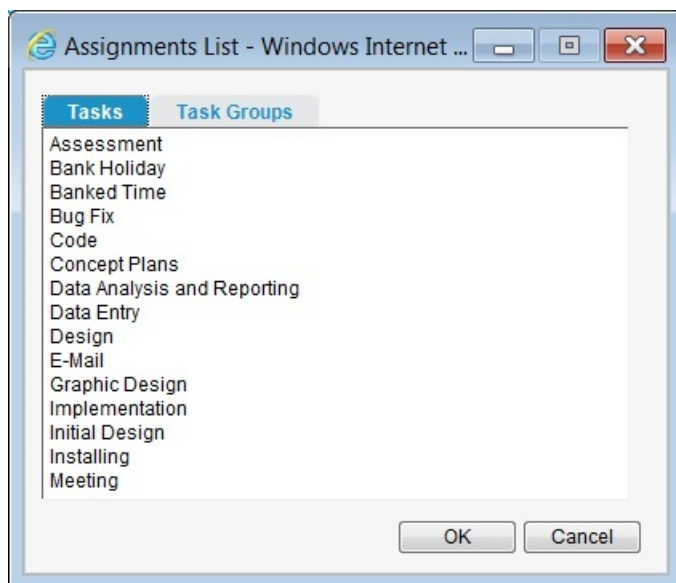
Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).

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.

Tip: If using project-based approval workflows (page 91), then you should reviews these whenever employees are added to a project.

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 202).

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.

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:

- **Project Planning** tool projects can be identified in the Project Assignments view by a small orange circle in the project icon . Changes to assignments and estimate information for these projects can only be accomplished using the Project Planning tool.
- Projects linked to Microsoft Project 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.

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.
- Review budget vs. actual statistics  for any item in the assignment tree (page 76).
- Use Filtering  to limit the amount of data displayed in the assignment tree.
- Use the **Limited Access Group** filter  (page 258) to only view those items assigned to specific Access Groups.
- Use **Show/Hide Assignments**  to hide a task from an employee's time entry view (page 76).
- Use the **Copy**  function to make a copy of an existing project or task assignment structure (page 77).
- Use the **Assignment Copy**  function to copy an employee's assignments to one or more other employees (page 80).

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. This option does not apply to projects created using the Project Planning tool.

To set a task to global:

1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
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 that are used to calculate Estimated Client Costs.

Estimate Client Cost = Estimated hours x Task prorating x Rate Charged

Note: You cannot adjust assignment properties for projects created using the Project Planning tool. These projects can be identified by the small orange circle in the project icon .

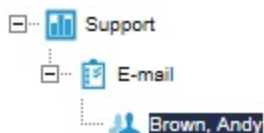
Tip: The Assignment Properties function is useful when editing estimate information on just a few assignments. To make changes to many assignments, it's best to use the Budgeted Time & Costs view's Budget Wizard.


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.
- **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. The initial Billable by Default setting is taken from this project's Billable by Default field.

To edit assignment properties:

1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
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, not available for Project Planning tool or Microsoft Project projects)
 - Prorating (not available for Project Planning tool projects)
 - Rate Charged (only available to users with appropriate security rights, not available for Project Planning tool projects). If enabled, select the currency for the rate.
 - Billable by Default
5. Click **OK** when finished.


View Budget vs. Actual Statistics

From the Project Assignments view, users can quickly view summary budget vs. actual statistics at any assignment level (client, project, task group, task or employee).

When any item in the assignment tree is selected, clicking F8 displays a small pop-up window with summary data for the item. All sub-level data is rolled up to the selected item's level. For example; if you select a client, then statistics are rolled up for all that client's projects.

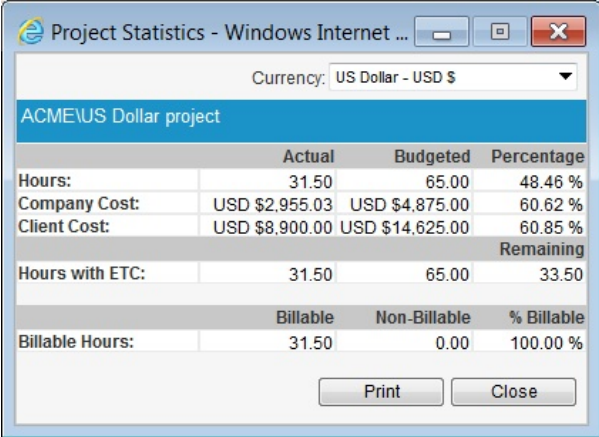
If enabled, the upper right corner of the pop-up window has a Currency drop-down list which permits calculated costs to be reviewed in any enabled currency. The 'Display by Project Currency' option displays costs in the currency associated to the project.

To view an item's statistics:

1. Select the **item** in the assignment tree.
2. Click the **View Statistics**  button on the toolbar. Or use **F8** on your keyboard.
3. The Statistics pop-up window opens.

Tips:

- You should designate the Dovico site as a safe site in the web browser's pop-up blocker settings.
- Leaving the pop-up window open and clicking on a different item in the assignment tree updates the information in the statistics window.



The screenshot shows a window titled 'Project Statistics - Windows Internet ...'. At the top, there is a currency dropdown menu set to 'US Dollar - USD \$'. Below this, the project name 'ACME\US Dollar project' is displayed. The main content is a table with columns for 'Actual', 'Budgeted', and 'Percentage'. The data rows are: 'Hours' (31.50, 65.00, 48.46%), 'Company Cost' (USD \$2,955.03, USD \$4,875.00, 60.62%), and 'Client Cost' (USD \$8,900.00, USD \$14,625.00, 60.85%). A sub-section titled 'Remaining' shows 'Hours with ETC' (31.50, 65.00, 33.50). Below this is another table with columns for 'Billable', 'Non-Billable', and '% Billable', showing 'Billable Hours' (31.50, 0.00, 100.00%). At the bottom, there are 'Print' and 'Close' buttons.

	Actual	Budgeted	Percentage
Hours:	31.50	65.00	48.46 %
Company Cost:	USD \$2,955.03	USD \$4,875.00	60.62 %
Client Cost:	USD \$8,900.00	USD \$14,625.00	60.85 %
Remaining			
Hours with ETC:	31.50	65.00	33.50
Billable			
	Billable	Non-Billable	% Billable
Billable Hours:	31.50	0.00	100.00 %

Note: Company or Client costs are only displayed to users with appropriate security rights.

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. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
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 .

Click the **Show/Hide Assignments** button again to reverse the operation.

Notes:

- For the employee, the task will be hidden/shown in the time entry view the next time the time entry screen is refreshed.
- If a Project Assignments view project is converted into a Project Planning tool project, then any task assignments for the project that are hidden using this function are reset to the 'Show assignment' status.
- If a project is linked to Microsoft Project, then the Publish option available within Microsoft Project may override this setting whenever assignments are updated.

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


Copy - Project, Task Assignments

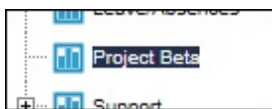
From the Project Assignments view, you can make an exact duplicate of assignment structures by project, task group, task or employee. When a copy is made, all sub-level properties of the item are also copied. For example, when a project is copied, all task groups, tasks and employees assigned to the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

The following describes how to copy and paste an item and its assignments within the assignment tree. Clients cannot be copied using this method. Although a Project Planning tool project can be copied, its assignments are not copied.


Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).


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 is 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.
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.
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.). 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.

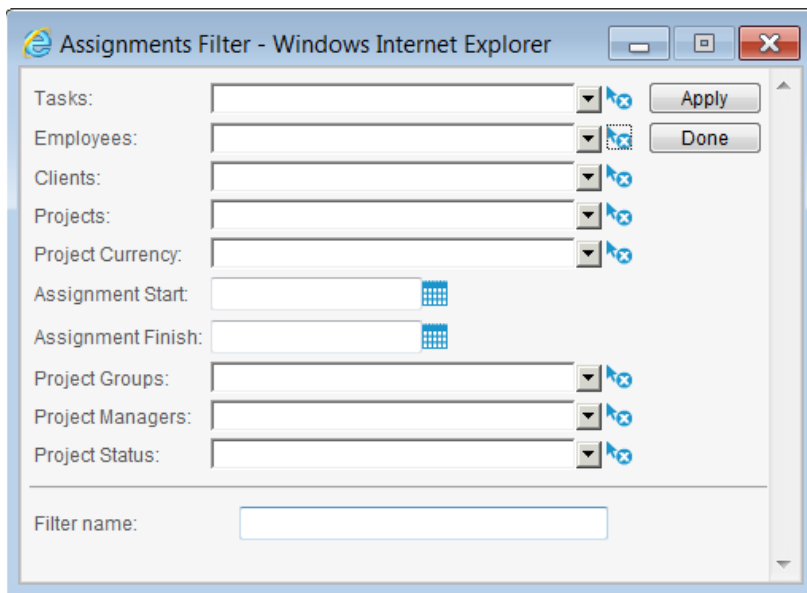
Notes:

- When a filter is applied, the remove filter button  is enabled in the toolbar.
- Filters created in this view are not public.

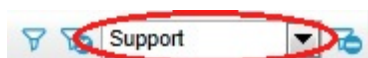
To create an assignment filter:

1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
2. Click the **Assignments Filter** button  located on the top toolbar.
3. Select items from one or more drop-down lists  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 assignments 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 the other items.

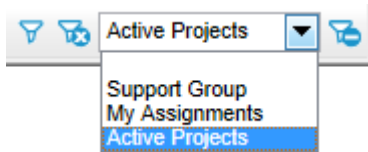
To remove a temporary or saved filter:

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.

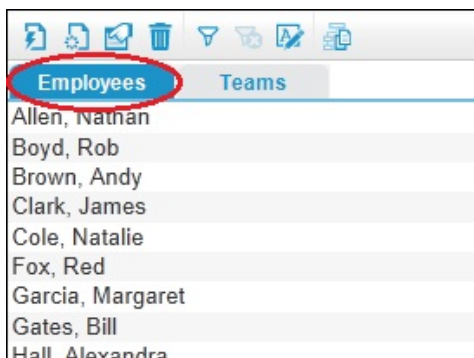
Notes:


- Assignments from Project Planning tool projects cannot be copied.
- When using this function, existing assignments for the employees receiving the new assignments are not lost.

Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).

To copy one employee's assignments to other employees:

1. In the Employees list pane, select the **employee** whose assignments will be copied.



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


Tip: If using project-based approval workflows (page 91), then you should review these whenever employees are added to a project.

Only Display Scheduled Assignments

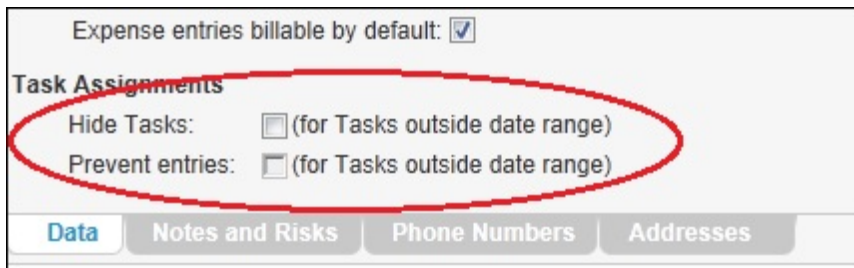
The Only Display Scheduled Assignments feature permits a manager or administrator to hide a project's task assignments from time entry users when the date is outside the task assignment's scheduled Start and Finish dates.

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 **Project Planning tool** or the **Budgeted Time & Costs** view.
1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
 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:



Expense entries billable by default:

Task Assignments

Hide Tasks: (for Tasks outside date range)

Prevent entries: (for Tasks outside date range)

Data Notes and Risks Phone Numbers Addresses


✓ **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 (page 299).

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

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

'More' button for Rates

When an employee's hourly rate or rate currency is changed, or when a task's prorating or an overtime prorating value is changed, you can control if these changes are applied to existing time entries using the **More** button. Controlling these changes is important because they all contribute in calculating costs. These change options are most useful when rates are applied after the software has been in use for a while and there is a need to backdate the changes. These options are available via the More button that appears when a change is made to one of these items. The following describes (1) how changes can be applied to existing (approved) time entries and (2) how changes affect future time entries and estimates.

Notes:

- The 'Currency' selection changes described are only available if enabled by your administrator.
- The terms 'estimated costs' and 'budgeted costs' are used interchangeably.

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

When a rate is changed, a 'More' button appears next to the field. Clicking the More button offers 3 options, which determine what changes, if any, are made to **approved time entries (actual costs)** that already exist in the database. These costs are displayed in the **Actual Time & Costs** view and in various reports. Any changes are automatically applied to future time entries - described further below.

- **Do not replace existing values** (the default option): No changes are made to rates, currency selections or proratings for approved time entries that already exist in the database. Only future entries will use this new value.
- **Replace last value only:**
 For Employee Rates and Currencies: To replace the most recently used rate value and currency in approved time entries with the new value.
 For Overtime Rates: To replace the most recently used value for this rate in approved time entries with the new value.
 For Task Proratings: To replace ALL proratings in approved time entries that exactly match the previous value.
- **Replace all values from:** To find and replace all rates, currency selections or proratings, regardless of its previous value, in approved time entries, from (and including) the selected date.

When the software's Time Lockout is enabled, attempts to edit rates using either the 'Replace last value only' or the 'Replace all values from' option may be denied if any time entries associated with a locked out date range will be affected by editing the rate. If the user has the appropriate Security option enabled (Time Lockout - Bulk Edit Override, page 224), then the option to override the time lockout is made available (Override time in locked down period). When this override option is used, all edits are recorded in the Audit trail - if the Audit Trail is enabled.

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

When an employee rate value or rate currency is changed, the new rate/currency is automatically applied to all future time entries. There are 2 exceptions:

1. If a rate/currency for a specific task assignment was manually edited using the Project Planning tool or the Budgeted Time & Costs view, then changes applied to the rate using the More button are not transferred to these manually edited task assignment rates/currencies.
2. If a project has its Freeze budget costs option selected, then changes will not be applied to the project.

The same rules apply when a task prorating is edited.

Notes:

- The More button option is not offered when editing rates or proratings in the Project Planning tool.
- Modifying overtime proratings does not alter budgeted costs as the overtime proratings are not used in calculating budgeted costs:
 - Estimated company cost = estimated hours x rate of wages
 - Estimated client cost = estimated hours x rate charged x task prorating

Quick Assign

In Dovico Planning & 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 hierarchical format, select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).

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. Select **Quick Assign** from the menu (Menu > Views tab > Quick Assign).
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**.

Tips:

- Hold the **Ctrl** key to make multiple selections in any Quick Assign list box.
- If using project-based approval workflows (page 91), then you should review these workflows whenever employees are added to a project.

Notes:

- When assigning using Teams, the user creating the assignments must have access to every member of a team before the team is displayed in the list.
- Projects created using the Project Planning tool or projects linked to Microsoft Project are not available in Quick Assign.

To remove assignments using Quick Assign:

Notes:

- Removing assignments will delete budget information (estimated hours, budgeted costs, etc.) but will not delete timesheet entries.
- Before removing assignments, all time and expense entries for the selected 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 are able to report on individual projects as well as 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. Any project can be associated to a project group.

To add a new project group:

1. Select **Project Groups** from the Menu (Menu > Views tab > Project Groups).
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. For reporting purposes only. 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 **Flag for archive** box if you want to remove this project group from the database the next time the Archive Database function is run.
8. Click **Save** .

Note: The number of project groups displayed in the view is limited by the **Paging** setting (page 202). You may need to click the **paging** buttons  or  (at the top of the screen) to view additional record pages.

Approvals

What are approvals?

The Approval mechanisms in Dovico Planning & Timesheet are means to allow selected managers to review and approve time and expenses submitted by end users before these are made available for their ultimate use; billing, reporting, project management, payroll, etc.

How approvals work



The **Approval Workspace** is the location in the software that contains all the views and functionality required to setup approval processes, and to review and approve time and expenses. Typically, approval workflows (paths) are first setup by your company's Dovico administrators and then used by managers to approve time and expenses submitted by employees.

Do you need to approve time and expenses?

Approvals can ensure that submitted time and expenses are entered accurately before the data can be forwarded for its ultimate use. Given that employees can occasionally enter time against the wrong project or task, on the wrong date, not select the correct billable option, etc., it can be important to your organization's goals that these be reviewed in a timely and efficient manner.

If you do not require approvals at this time, then the default configuration of a new database does not demand any actions on your part and the 'Approvals' section of this User Guide can be skipped. If no approval workflows are created, time or expenses submitted by employees are immediately available for reporting, costing, payroll, billing, etc. Approvals can always be setup and applied at a later time.

Note: The Time Lockout function is also located in the Approval Workspace area of the software but you are not required to create approval workflows to use Time Lockout.

In Approvals ...

Approval Workflows	page 88
Workflows based on who submitted (sheet-based)	page 89
Workflows based on the project worked on (project-based)	page 91
Review approval paths	page 94
Setup Alternate Approving Managers	page 95
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Override approval workflows.	page 103
Time Calendar.	page 104
Time Lockout	page 106

Workflows

What are Approval Workflows?

Approval Workflows are rules that establish which manager must approve submitted time or expenses before those entries can be processed for billing, reporting, project management, payroll, etc. When a user submits time or expenses, the software checks the submitted sheet for any entries requiring review and approvals, and these are forwarded to the appropriate approving manager.

2 types of approval workflows can be created:

- **Sheet-based** approvals where all entries submitted by a particular employee are forwarded, as a whole, to the designated manager.
- **Project-based** approvals where only those entries submitted against the chosen project are forwarded to the designated manager.

In addition to the 2 types of approval workflows described above, separate workflows are used for time and for expenses. This, for example, permits an accounting manager to approve an expense without also having to approve that employee's time.

Generally, approval workflows are created by first determining what type of workflow is required (sheet or project), selecting the employees whose submitted entries will follow the approval workflow, and selecting the manager(s) who must approve the submitted entries.

What types of approval workflow do I use?

You can setup sheet-based approval workflows or project-based approval workflows, use both types separately or use them in combination.

Also note that multiple approval workflows of each type can be created permitting each team, department, division, etc. to have their own workflows. The following simplified scenarios may offer some insight on how best to configure approval workflows for your organization.

Sheet based approvals instructions begin on page [89](#).

Project based approvals instructions begin on page [91](#).

Instructions on combining project and sheet based workflows begin on page [92](#).

Scenario	Workflow type
All entries submitted by an employee must be approved by a manager.	Use sheet based workflows
All entries against a particular project must be approved by a manager. All other submitted entries do not need to be approved.	Use project based workflows
All entries against a particular project must be approved by a manager. All other submitted entries must be approved by a different manager.	Use separate project and sheet based workflows
All entries against a particular project must first be approved by a manager after which , these and all other entries, must be approved by a different manager.	Use combined project and sheet based workflows

Sheet-based approval workflows

Sheet-based approval workflows are used to direct an employee's submitted time or expense sheet, as a whole, to one or more approving managers. When more than one manager needs to approve a sheet, the workflow also controls which manager approves first, second, and so on. Sheet-based approval workflows are one of 2 types of possible approval workflows. The differences are highlighted on page 88.




Prerequisite:

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

To create a sheet-based approval workflow:

- Select **Approval Workspace** from the menu (Menu > Views tab > Approval Workspace).
- Select the **Workflows** tab near the top of the screen.
- Select the **Approval Workflow** tab located below the toolbar.
- Select **All Projects** from the Projects drop-down list. The term 'All Projects' is used to identify the workflow as one that applies to **all time** (or expenses) regardless of which project the entries are associated with. The term 'Sheet-based' is used throughout these instructions when All Projects is selected since the entire sheet is sent to the manager in the workflow.




- Click the **New** button  on the toolbar to launch the Workflows pop-up window.
- Enter a unique workflow **name** (up to 100 characters).
- Select the **approval type** (i.e. Timesheet or Expense). Note that the approval type cannot be modified after the workflow is created.
- (Optional)** Enter a **description** (up to 250 characters).

The list of **Available Employees** in the top left corner is divided into two areas:

- Unassigned:** lists employees not currently assigned to any 'All Projects' type workflow.
- Assigned:** lists employees already assigned to an 'All Projects' type workflow. The name of the workflow is appended to the employee's name.

Notes:

- An employee can only be assigned to one 'All Projects' workflow for time and one 'All Projects' workflow for expenses.
- A workflow cannot be deleted while sheets actively awaiting approval are linked to a workflow.



- Select and transfer  the employees whose submitted entries will be forwarded to approving managers. Selecting an employee already assigned to another workflow will move that employee to the new workflow.

Tip: You can graphically review approval paths for any employee by clicking the Show Approval Paths button



on the toolbar. See page 94 for full details on this option.

- From the list of **Available Managers** in the bottom left corner, select and transfer the managers that need to approve the time or expense entries to the Approving Managers list on the right. 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 should also have a **security level** giving them access to the Time & Expense Approval tab (normally Team Leader or higher).

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 approve 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 button.
12. Click **Done**.

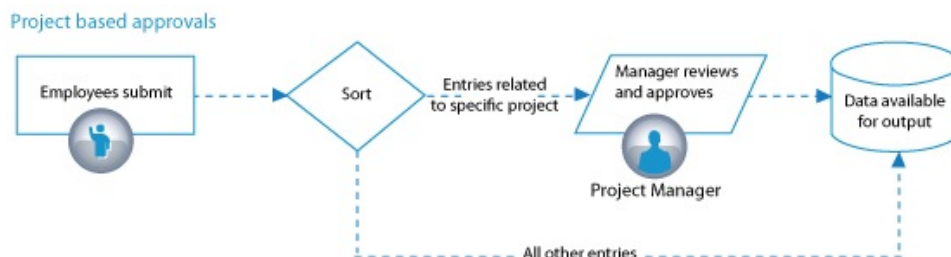
The approval workflow is now setup, assigned and active.

Note: A red icon (Alert Center) is placed below the Logout button whenever an administrative user has time or expenses awaiting approval.

Tip: There are options to notify managers via e-mail (page 164) when they have time or expenses awaiting their approval.

Project-based Approval Workflows

Project-based approval workflows are used to direct submitted time or expenses that are tracked against a specific project to one or more approving managers. When more than one manager needs to approve a sheet, the workflow also controls which manager approves first, second, and so on. Project-based approval workflows are one of 2 types of available approval workflows. The differences are highlighted on page 88.



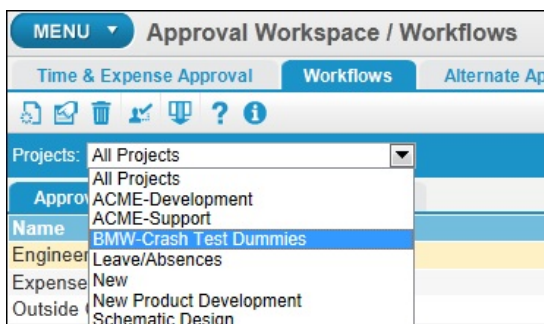
The following describes how to (1) create a **Project-based Approval workflow** and how to (2) create and (3) edit a **Project Approval template**.



Prerequisites:

- The **managers** (employees) designated to approve time and expenses should be established.
- All employee **assignments** for the selected project should be completed.

To create a project-based approval workflow:

1. Select **Approval Workspace** from the menu (Menu > Views tab > Approval Workspace).
2. Select the **Workflows** tab near the top of the screen.
3. Select the **Approval Workflow** tab located below the toolbar.
4. From the **Projects** drop-down list, select the project for which this approval workflow will apply.



5. Click the **New** button  on the toolbar to launch the Workflows pop-up window.
6. Enter a unique workflow **name** (up to 100 characters). It's a good idea to include the project name in this field or in the description field (step 8).
7. Select the **approval type** (i.e. Timesheet or Expense). Note that the approval type cannot be modified after the workflow is created.
8. (**Optional**) Enter a **description** (up to 250 characters).
9. (**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 93 to learn how to create an approval template.
10. From the list of **Available Employees**, select and transfer employees to the **Assigned Employees** list using the Assign button .

Notes:

- The Available Employees list displays all employees that are assigned to this project.
- An employee can only be assigned to one Timesheet workflow and one Expense workflow per project.

Tip: You can graphically review approval paths for any employee by clicking the **Show Approval Paths** button



on the toolbar. See page 94 for full details on this option.

- 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 should also have a **security level** giving them access to the Time & Expense approval view (normally Team Leader or above).
- 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 approve 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 button.
- (Optional) The '**Combine this workflow with All Projects workflow**' box is used to join this project specific workflow with existing 'All Projects' (Sheet-based) workflows.

Checked: Submitted entries that are identified for project approvals are first extracted and sent to the project approving manager before they are forwarded to the approving manager for the All Projects (Sheet-based) workflow. Entries not associated with project specific approvals are immediately forwarded to the All Projects workflow approving manager. See diagram below.

Unchecked: Submitted entries associated with Project-based Approvals bypass any All Projects (Sheet-based) approval workflows.

Sample scenario:

All of Jack's time entries must be approved by his division's supervisor (Ralph) and as such, Jack is assigned to an All Projects workflow (sheet-based workflow) where Ralph is the approving manager. Jack is also working on a project where that project's manager (Jane) wants to approve Jack's time for her project and does not need to review Jack's other time entries.

This workflow scenario is achieved by creating a Project specific workflow where Jane is the Approving Manager for her project and then checking the 'Combine this workflow...' checkbox near the bottom of the Workflow pop-up window.

Combined project and sheet based approvals



- Click **Done**.

The project approval workflow is now setup, assigned and active.

Note: A red icon (Alert Center) is placed below the Logout button whenever an administrative user has time or expenses awaiting approval.


Tip: There are options to notify managers via e-mail (page 164) when they have time or expenses awaiting their approval.

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 create a new project approval workflow that is linked its originating template. Then any future changes made to the template can be transferred to the workflow.

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


To create a project approval template:

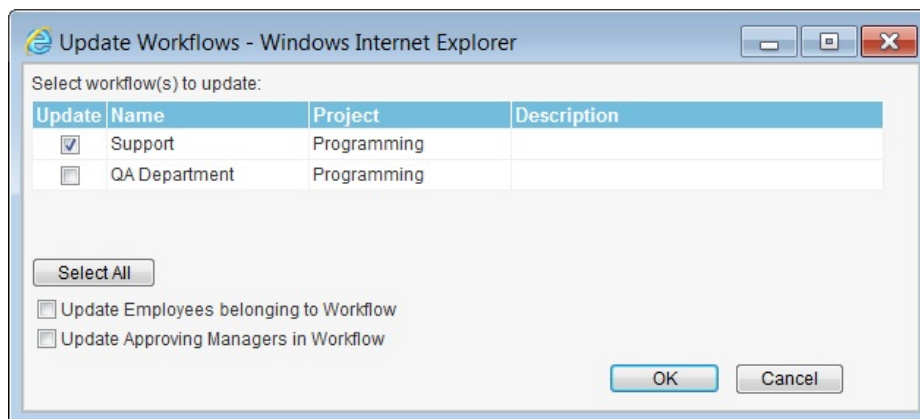
1. Select the **Approval Template** tab located below the toolbar. All existing approval templates are displayed.
2. Click the **New** button on the toolbar to launch the Template pop-up window.
3. Enter a unique **name** for this Approval Template (up to 100 characters).
4. Select the **type** of workflow (Timesheet or Expense) from the drop-down list.
5. (**Optional**) Uncheck the **Public** box to make this template available only to you. When checked, the template is available to any user creating a project-based approval workflow. This option cannot be modified after the template is saved.
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: Approval templates are not project specific (unlike project-based 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  or 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).
9. Click **Done**.
This approval template is now ready to use whenever a project-based approval workflow is created.


To edit a project approval template:

1. Select the **Project Approval Template** from the list in the Approval Template tab.
2. Click the **properties button**  on the toolbar.
3. Make changes to employees or managers as required.
4. Click **Done**.
An Update Workflows window opens, which displays all the project-based workflows that are linked to this template. This is the opportunity to transfer the template changes to any or all linked workflows.
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.





How to review an employee's approval paths:

A manager can review an employee's workflow paths and can determine the status of any sheet awaiting approval by using the **Show Approval Paths** function. Employees can review approval paths for their own submitted time and expenses by using a similar function within the time entry tool.

1. Select the **Workflows tab** from the Approval Workspace.
2. Click the **Show Approval Paths** button  on the toolbar.
The Approval Paths window opens.
3. Select the **employee** from the Employee drop-down list at the top of the window. Employees who are not assigned to any approval workflow are not shown in the drop-down list.

Approval paths for time and expenses are displayed with approving managers listed for each workflow. To view the status of a specific submitted sheet, select the sheet from the **Sheets to be approved** drop-down list. Sheets already approved are not displayed in this list.

- A dashed line  is used to display the workflow when entries designated for a project specific workflow are also directed to a sheet-based workflow (All Projects).
- When a specific sheet is selected from the drop-down list, the active workflow is highlighted in yellow and a yellow dot  is placed next to the manager who must next approve the sheet.

Notes:

- An option to disable the Show Approval Paths function within the time entry tool is available in the Timesheet Options view (page 204).
- By default, a maximum of 10 project-based workflows can be displayed in the Approval Paths pop-up window.

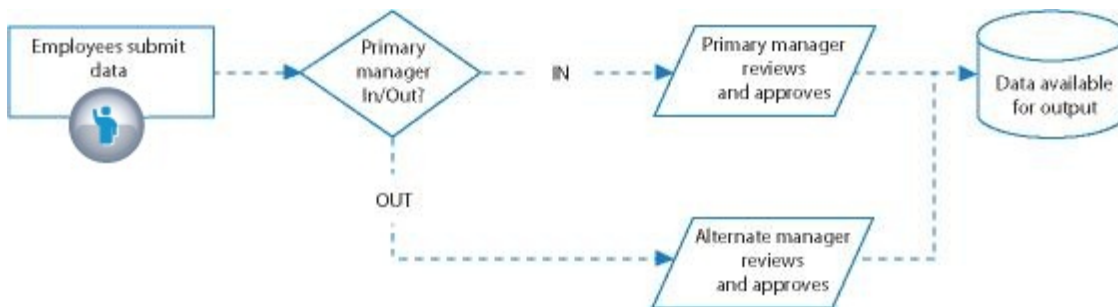
Alternate Approvals

The **Alternate Approvals** tab is the location where alternate approving managers can be designated for those situations or periods of time when an approving manager is not available to approve time/expenses. Alternate Approvals work in combination with Approval Workflows (page 88).

To better differentiate between approving managers and alternates, this documentation uses the term 'Primary' approving manager to identify the managers assigned to the actual Approval Workflow. The term 'Alternate' is used to identify those who can approve on the Primary manager's behalf.

Functionality within Alternate Approvals permits an administrator to pre-select the alternate approving managers for a given primary manager. It allows a primary approving manager to easily switch his/her own status (out of the office), and it notifies alternate approving managers, via e-mail, when the primary approving manager's status has changed.

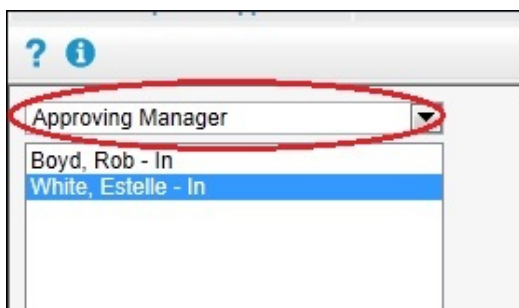
The following details (1) how to designate one or more alternate approving managers for a primary approver and (2) how to change the primary approver's status (In/Out).



Simplified alternate approval workflow

How to designate an alternate approving manager:

1. Select **Approval Workspace** from the menu (Menu > Views tab > Approval Workspace).
2. Select the **Alternate Approvals** tab near the top of the screen.
3. Make sure that **Approving Managers** is selected in the left side drop-down list.



The list contains all managers that are currently assigned as approving managers to any approval workflow - the primary approving managers. Appended to each manager name is the current In/Out status for the manager. The 'In' status signifies that the primary manager is available to approve time/expenses and that these entries will not be available to the alternate managers.

4. Select the **primary approving manager** from the left side list box.
5. Select one or more **alternate managers** from the list box on the right. The list on the right includes all employees with access to administrative functions (assigned to 'All' in the employee properties Software access field). When more than one alternate manager is selected, any of the managers are able to approve for the primary approving manager. To approve time and expenses, employees listed as alternate managers should also have a security level giving them access to the Time & Expense approval view.

When a primary approving manager's status is set to 'Out', that manager is still able to approve time and expenses.

- Click **Apply**.

In the example below, Andy and Estelle are designated as alternate approving managers for Rob.

Approving Manager	Alternate Manager
Bishop, Terry - In	Bishop, Terry
Boyd, Rob - In	Boyd, Rob
White, Estelle - In	Brown, Andy
	Garcia, Margaret
	Moore, Sarah
	White, Estelle

OPTIONAL INSTRUCTIONS

- To immediately enable alternate approvals for the primary manager, check the '**Allow alternate managers to approve work for..**' box. Checking this box sends an e-mail to the alternate managers notifying them to approve time/expenses for the primary manager. Detailed instructions on enabling and disabling alternate approvals and e-mail configurations follow.
- Click **Apply**.

Notes:

- Once a submitted sheet is approved by an alternate manager, that sheet is forwarded to the next approving managers if the sheet requires multiple approvals, as designated by the approval workflow.
- Considering the note above, it is possible that a manager may have to approve the same sheet twice if, for example, that a manager is an alternate for the first approving manager and is also the second approving manager in the approval workflow.

Tips:

- You can also designate an alternate approving manager to multiple primary managers in one easy step by switching the left side drop-down list from Approving Manager to Alternate Manager. This effectively switches the assigning logic so that you can select one alternate approving manager and assign him/her as an alternate to multiple primary approving managers.
- You can review for whom an alternate manager is approving by picking 'Alternate Manager' from the left side drop-down list and then selecting the manager from the list.

Enabling or disabling alternate approvals:

Alternate approvals can be enabled by the primary approving managers when their absence is planned, or can be enabled by any user with Administrator access rights when primary managers are unable to switch their own status. The following assumes that alternate managers have already been designated for the primary approving managers.

Primary approving managers can change their own In/Out status and therefore enable/disable alternate approvers at any time.

- Go to the **Time & Expenses Approval** tab in the Approval Workspace area.
- Check (or uncheck) the '**Allow alternate managers to approve my work**' box located in the toolbar near the top of the screen.
 - When **checked**, time or expenses submitted to the primary approving manager are available to the alternate managers. Any existing sheets awaiting approval are also available. An e-mail is

sent to the alternate managers advising them to approve entries for the primary approving manager.

- When **unchecked**, time and expenses available to alternate approving managers are no longer available to them to approve. An e-mail is sent to the alternate managers advising them of their status change.

Administrators can change the In/Out status for any primary approving manager.

1. Go to the **Alternate Approvals** tab.
2. Verify that '**Approving Manager**' is chosen from the left side drop-down list.
3. Select the **approving manager** from the list.
4. Check (or uncheck) the '**Allow alternate managers to approve for ...**' box located below the list.
5. Click **Apply**.

Notes about e-mail notifications:

- The text used in the notification e-mails can be modified with a utility in the Options view (page 202).
- When adding a manager to an existing set of alternate approving managers, a notification e-mail will not be sent to the additional manager.

Time & Expense Approval

The **Time & Expense Approval** view is the location used to review, approve or reject submitted employee timesheets, expenses or time lockout exception requests. Also available is the ability for administrators and managers to override approval workflows for any given sheet. The following section of the User Guide is divided into 2 main sections. The Time/Expense approval instructions begin immediately. Instructions on how to approve Time Lockout exception requests begin on page [106](#).

A manager designated to approve time and expenses only sees the items for which he or she is an approving manager and only sees them when they are next in the approval order. When designated as an alternate approving manager, the user is able to access the primary approver's sheets awaiting approval.

Note: A red icon (Alert Center) is placed below the Logout button whenever there are time or expenses awaiting your approval.

Prerequisite:

- Only timesheets and expenses assigned to an approval workflow (page [88](#)) appear in the Time & Expense Approval view.

To approve/reject timesheet entries:

Instructions for approving expenses begin on page [99](#).

1. Select **Approval Workspace** from the menu (Menu > Views tab > Approval Workspace).
2. Select the **Time & Expense Approval** tab near the top of the screen.
3. Select for whom you are approving from the **Approving For** drop-down list in the upper left corner. The list includes other manager names only if you are designated as an alternate approving manager and if your status as an alternate has been enabled. 'All Managers' is displayed if your security level is Manager or above. When selected, the 'To Be Approved' drop-down list (step 4) includes all items awaiting approval for other managers.
4. Select a **timesheet** from the **To Be Approved** drop-down list. The list is divided by types of submission; time, expenses or time lockout.

The view consists of 2 tabs:

Summary tab



The Summary tab displays, in the top pane, summary information on the time submitted by project and task. The time to approve is highlighted in blue (the Hours to Approve column). All other data shown is for information purposes only and described in detail on page [101](#).

Details tab


The Details tab displays, in the top pane, submitted entries broken down by day. Details for any single entry are shown in the middle pane when any individual entry is selected within the top pane. All other data shown is for information purposes only and described in detail on page [103](#).

5. There are 3 options for approving/rejecting time entries.

Note: When the timesheet falls within a Time Lockout period, the approve/reject buttons are not available. An Exception Request to open the timesheet can be created (page [111](#)).

- To **approve all** time entries within a timesheet, click the **Approve** button  on the toolbar from either the Summary or Details tab.
- To **reject all** time entries within a timesheet, click the **Reject** button .

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.


- To **approve some entries and reject others** within a timesheet:
 - a. Select the **Details** tab.
 - b. In the top pane, select the entries to reject by clicking in the cell (use the Ctrl key to select multiple entries).
 - c. Click the **Approve with Exclusions** button  on the toolbar.

Notes:

- When time is rejected, the employee who submitted the time receives an e-mail notification if this option has been enabled (page 67).
- When time is rejected and the time falls within a time locked out period, the period is temporarily unlocked so that the employee can correct and resubmit the time.
- A cell with a yellow colored background indicates that the time was submitted as overtime.
- 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 naming convention for timesheets is: 'last name', 'first name' from 'date range'.


Note about Details tab: When a given 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:

- Placing your mouse over a date in the column header will show the month and year for that column.
- Use the **Show/Hide** column  function to personalize what information is displayed in the view.
- If a time entry has been approved in error, it can be rejected using the **Time Calendar** 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.

Request an exception to unlock the timesheet:

When the timesheet falls within a Time Lockout period, the approve/reject buttons are not available to the approving manager. Before the timesheet can be approved/rejected, the sheet must be unlocked. If the approving manager has the appropriate security rights, he or she may manually create an exception for the sheet (page 112). Otherwise, the approving manager must request that another manager unlock the sheet so that it can be approved.


1. Click the  **Request Exception** button.
2. Select to which **Manager** the exception request will be sent. This list is comprised of all users who have access to the Time Lockout view.
3. Enter a **Reason** for the request.
4. Click **Submit**.

The selected manager is sent an e-mail notifying him or her of the request.



To approve/reject expense entries:

Note that, unlike approving timesheets, there is no Summary tab when approving expenses.

If enabled, the upper right corner of the screen has a Currency drop-down list which permits calculated costs to be reviewed in any enabled currency. The 'Display by Project Currency' option displays costs in the currency associated to the project.

1. Select the **Time & Expense Approval** tab near the top of the screen.
2. Select for whom you are approving from the **Approving For** drop-down list in the upper left corner. The list includes other manager names only if you are designated as an alternate approving manager and if your status as an alternate has been enabled. 'All Managers' is displayed if your security level is Manager or above. When selected, the 'To Be Approved' drop-down list (step 3) includes all items awaiting approval for other managers.
3. Select an **expense sheet** from the To Be Approved drop-down list.
 - The **top pane** of the view displays the expenses rolled-up by expense category. '[None]' is displayed if no category is associated with the expense. If enabled, costs are displayed in the currency selected in the upper right corner of the view.
 - An **attachment icon**  is displayed to the left of the Project/Expense Category name if an expense has an attachment. You can review the attachment using the middle pane - described next.
 - The **middle pane** displays the individual expense entry details for the Expense Category selected in the top pane. You can open any expense attachments by clicking on the attachment icon. No information is displayed in the middle pane if more than 1 item is selected in the top pane.

If currencies are enabled;

- The **Amount Entered** costs are displayed in the currency selected by the employee who submitted the expense.
 - The **Converted Amount, Fixed Costs, VAT and Client Cost** are displayed in the currency selected in the Currency drop-down.
 - The **Reimburse Employee** value is displayed in the currency in which the employee is paid (Rate of Wages).
 - 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 yet approved.
4. 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 .

Enter a detailed **reason for the rejection** in the pop-up window. This reason is 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.

Notes:

- When expenses are rejected, the employee who submitted the expense will receive an e-mail notification if this option has been enabled (page 67).
- The naming convention for expense sheets is: 'last name', 'first name' 'sheet name' on 'project name' from 'date range'.

Tips:

- Placing your mouse over a date in the column header will show the month and year for that column.
- If an expense sheet has been approved in error, it can be rejected using the **Approved 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.

Details on information displayed in Approval Summary tab

The Summary tab in the Time & Expense Approval view is divided into 2 horizontal panes:


The **Time To Approve** pane (top) displays summary information on the employee's time submitted by project and task for the sheet. The time to approve is highlighted in blue. To the right is optional statistical data.

The **Total Employee Time in date range** pane (bottom) is provided to place the submitted entries in context against the employee's other entries in the same date range. This information can be important if an employee's submitted entries are split amongst different approving managers or when multiple submissions are made for the same date range.

The following details each column available in the Summary tab.

Summary		Details		Timesheet for: Richards, Terry		Dates: Sun Nov 09, 2014 to Sat Nov 15, 2014		Next Approver: N/A (This is the final approval)	
Time to approve				Statistics (includes time to be approved)					
				% Worked		Billable %			
Project/Task	Hours To Approve	Total Hours in Range	Estimate / Actual	Last 4 Weeks	Life of Project	Current Range	Last 4 Weeks	Life of Project	
ACME-Development									
Data Analysis and Reporting	8.50	12.50	55.00 / 20.50	36.87 %	12.71 %	100.00 %	100.00 %	100.00 %	
Design	7.75	15.00	55.00 / 22.50	40.47 %	13.94 %	100.00 %	100.00 %	100.00 %	
Project Total	16.25	27.50	110.00 / 43.00	77.34 %	26.65 %	100.00 %	100.00 %	100.00 %	
BMW-Crash Test Dummies									
Research	5.00	5.50	0.00 / 5.50	9.89 %	3.41 %	100.00 %	100.00 %	100.00 %	
Specifications	4.00	4.50	0.00 / 4.50	8.09 %	2.79 %	100.00 %	100.00 %	100.00 %	
Project Total	9.00	10.00	0.00 / 10.00	22.66 %	7.81 %	100.00 %	100.00 %	100.00 %	
Total	25.25	37.50	110.00 / 53.00	100.00 %		100.00 %	100.00 %		
Total Employee time in date range (approved and to be approved)									
ACME-Development									
Data Analysis and Reporting	8.50	12.50	55.00 / 20.50	36.87 %	12.71 %	100.00 %	100.00 %	100.00 %	
Design	7.75	15.00	55.00 / 22.50	40.47 %	13.94 %	100.00 %	100.00 %	100.00 %	
Project Total	16.25	27.50	110.00 / 43.00	77.34 %	26.65 %	100.00 %	100.00 %	100.00 %	
BMW-Crash Test Dummies									
Research	5.00	5.50	0.00 / 5.50	9.89 %	3.41 %	100.00 %	100.00 %	100.00 %	
Specifications	4.00	4.50	0.00 / 4.50	8.09 %	2.79 %	100.00 %	100.00 %	100.00 %	
Testing	0.00	2.60	0.00 / 2.60	4.68 %	1.61 %	100.00 %	100.00 %	100.00 %	
Project Total	9.00	12.60	0.00 / 12.60	22.66 %	7.81 %	100.00 %	100.00 %	100.00 %	
Total	25.25	40.10	110.00 / 55.60	100.00 %		100.00 %	100.00 %		

Notes:

- The bottom pane can be disabled (page 209).
- Columns can be hidden using the **Show/Hide** button  on the toolbar.
- There is no Summary tab when approving expense sheets.

Hours to Approve column:

Sum of hours submitted in this sheet by project and task for the date range.

Total Hours in Range column:

Sum of all submitted hours for the task, in this and other sheets, plus hours previously approved in the same date range.

$$\text{Total Hours in Range} = \begin{matrix} \text{Submitted hours on the project and task from this sheet.} \\ + \text{Submitted hours on this project and task in other sheets, within the same date range.} \\ + \text{Previously approved hours on this project and task in the same date range.} \end{matrix}$$

Estimate/Actual column:

Estimated (budgeted) hours for the task compared to the sum of all submitted and approved hours for the task, during the project's lifetime.

$$\text{Estimate/Actual} = \frac{\text{Estimated hours for this project and task assignment}}{\text{Employee's total hours on this project and task assignment (approved and awaiting approval)}}$$

% Worked column group:

The employee's hours for the task compared with all hours for all tasks.

$$\% \text{ Worked} = \frac{\text{Employee's total hours on this project and task assignment (approved and awaiting approval)}}{\text{Employee's total hours on ALL project and task assignments (approved and awaiting approval)}}$$

The % Worked value is calculated and displayed for the Last 4 weeks and the Life of the Project.

Billable % column group:

The employee's billable hours for the task compared with all hours for the same task.

$$\text{Billable \%} = \frac{\text{Employee's total billable hours on this project and task assignment (approved and awaiting approval)}}{\text{Employee's total hours on this project and task assignment (approved and awaiting approval)}}$$

The Billable % value is calculated and displayed for the sheet's date range (Current Range), the Last 4 weeks and the Life of the Project.

Notes:

- The 'last 4 weeks' is defined as the last date in the sheet's date range and going back 4 weeks.
- The 'life of project' is defined as the earliest entry for the project to the most recent entry.



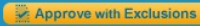
Details on information displayed in Approval Details tab

The Details tab displays, in the top pane, submitted entries broken down by day and is divided into 3 horizontal panes:

The **Time To Approve** pane (top) displays submitted entries broken down by day and by project and task for the sheet.

The **Details** pane (middle) displays time entry specifics for any single entry (duration, overtime, description, etc.) when any individual entry is selected within the top pane.

The **Total Employee Time in date range** pane (bottom) is provided to place the submitted entries in context against the employee's other entries in the same date range. The information included in the bottom pane includes time previously approved plus time awaiting approval for this and other submitted sheets. This information can be important if an employee's submitted entries are split amongst different approving managers or when multiple submissions are made for the same date range.

Summary		Details		Timesheet for: Richards, Terry							Dates: Sun Nov 09, 20	
Time to approve												
Project/Task	Sun. 9	Mon. 10	Tue. 11	Wed. 12	Thu. 13	Fri. 14	Sat. 15	Total				
ACME-Development												
Data Analysis and Reporting		5.00				3.00	0.50	8.50				
Design		2.00	1.00		1.75	3.00		7.75				
BMW-Crash Test Dummies												
Research		1.00	1.00		3.00			5.00				
Specifications							4.00	4.00				
Total	0.00	8.00	2.00	0.00	7.75	7.50	0.00	25.25				
Start Time	End Time	Duration	Billable	Overtime Rate	Client Overtime Rate	Description						
07:48	09:33	1.75	Yes	[None]	[None]	Description entered for						
Total Employee Time in date range (approved and to be approved)												
Project/Task	Sun. 9	Mon. 10	Tue. 11	Wed. 12	Thu. 13	Fri. 14	Sat. 15	Total				
ACME-Development												
Data Analysis and Reporting		5.00	1.00	3.00	3.00	0.50		12.50				
Design		2.00	5.25	3.00	1.75	3.00		15.00				
BMW-Crash Test Dummies												
Research		1.00	1.00	0.50	3.00			5.50				
Specifications			0.50				4.00	4.50				
Testing			1.60	1.00				2.60				
Total	0.00	8.00	9.35	7.50	7.75	7.50	0.00	40.10				

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 **all approval workflows**.

To override a submitted sheet's approval workflows:

From the Time & Expenses Approval tab:

1. Select the sheet from the **To Be Approved** drop-down list.
2. Click the **Approval Override** button  on the toolbar.
3. In the confirmation window, click **OK** to override all approval workflows for this sheet.

Note: The approval override of a timesheet will not be permitted if time entries within the submitted sheet fall within the lock out period.

Time Calendar

This month-at-a-glance view enables a manager to quickly review, edit and reject time entries that have been approved. 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 the software's Time Lockout is enabled, time entries associated with employees that fall within the lock out period cannot be edited, deleted or rejected. New time entries cannot be added under these same conditions.

The Time Calendar view is accessed from the menu (Menu > Views tab > Time Calendar).

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.

Moore, Sarah


2. Select the **month** and **year**.

The employee calendar is displayed

- Hours shown in **blue** are regular hours worked
- Hours shown in **orange** are overtime hours worked



April 2014 Boyd, Rob						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
			Reg: 8.00 hrs	Reg: 6.00 hrs	Reg: 8.00 hrs	
6	7	8	9	10	11	12
	Reg: 7.50 hrs OT: 3.00 hrs	Reg: 8.25 hrs	Reg: 6.90 hrs	Reg: 4.00 hrs	Reg: 11.25 hrs	
13	14	15	16	17	18	19
	Reg: 7.50 hrs	Reg: 5.00 hrs	Reg: 7.50 hrs OT: 2.50 hrs	Reg: 7.50 hrs	Reg: 8.00 hrs	
20	21	22	23	24	25	26
OT: 4.00 hrs	Reg: 8.00 hrs	Reg: 4.50 hrs	Reg: 8.00 hrs	Reg: 8.00 hrs	Reg: 8.00 hrs	
27	28	29	30	1	2	3
	Reg: 8.00 hrs	Reg: 8.00 hrs OT: 2.00 hrs	Reg: 9.00 hrs			
Regular Hours: 156.90 hrs + Overtime Hours: 11.50 hrs = Actual Hours: 168.40 hrs Average Hours: 7.65 hrs Most hours worked on: ACME-Development						

To edit an employee's time entries:

1. Click on the day of the month containing the time entries to edit.
2. Click the **View Timesheet** button  on the toolbar.
3. Select the time entry row to edit.
4. Edit the time entry information using the bottom part of the view.


- Click the **Save** button  to save changes made.

To reject an employee's time entries:

- From the Monthly view, click on the day of the month containing the time entry to reject.
- Click the View Timesheet button  on the toolbar.
- Select the row to reject.
- Click the **Reject** button .
- Enter the reason for the rejection. This reason is displayed to the employee who submitted the time.

Note: When time is rejected, the employee who submitted the time will receive an e-mail notification if this option has been enabled (page 67).




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

- From the Monthly view, select 1 or more days by clicking on the calendar day.
- Click the **Reject** button .
- Enter the reason for the rejection.

To add time entries for an employee:

Warnings:

- Time entries added using this view bypass all approval workflows.
- 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 the Budgeted Time & Costs view.

- Select the **employee** from the drop-down list.
- Select the **month** and **year**.
- Select the day of the month and click the **View Timesheet** button .
- Click the **New** button  on the toolbar.
- Select the **project** from the drop-down list.
- Select the **task** from the drop-down list.
- (Optional) Select the **overtime rate** (only available to users with appropriate security rights).
- Check the **billable** box if this time entry is billable.
- Enter a **duration** (in hours). This is the total time worked.
- or**
Enter the **start** and **end** times for the time entry.
- (Optional) Select the **client overtime rate** (only available to users with appropriate security rights).
- (Optional) Enter a **description**.
- Click the **Save** button .

Time Lockout

What is Time Lockout?

Time Lockout is an optional feature, which prevents additions or changes to time entries after a specified date. Time Lockout can be established as a one-time event or can be configured as a recurring rule, which repeats based on a schedule; weekly, monthly, etc.

Do you need to use Time Lockout?

The Time Lockout feature can be important for those companies using the time data for payroll, billing, or any purpose where it is critical that no information be added, or altered, after a specific date.

How Time Lockout works

Time Lockout is defined and controlled by an administrator. In general, a lockout date is selected and applied. After the established lockout date, no manager is able to edit, delete, or adjust time entry details or rates that exist on, or before, the lockout date. Similarly, employees are not able to enter or submit time entries that fall on or before the lockout date.

When required, managers or time entry employees can submit a request to open the lockout period. When the request is approved, the lockout period is opened for the employee or manager, and is only opened for a period of time defined by the approver.

An e-mail notification can also be setup to automatically notify employees when a time lockout is about to occur.

Lockout rules can be configured in two ways: a System Lockout rule, which applies to all users, or an Employee Lockout rule, which applies only to selected employees. The Employee lockout option can be useful when not all employees require the same lockout dates or when some employees can be exempt from all lockout rules.

Note that the lockout period does not apply to expenses.

In Time Lockout...

System Lockout	page 107
Employee Lockout	page 108
Lockout Exceptions	page 110
Views and tools affected using Time Lockout.	page 114

System Lockout

The System configuration for Time Lockout allows a company to specify a date after which no one is permitted to enter or submit time to the locked out period or to edit previously approved time for this same period. A system lockout can be configured as a one-time event or can be configured as a recurring rule, which repeats based on a schedule; weekly, monthly, etc.

The System Lockout configuration is one of 2 types of possible lockout implementations. The other is Employee Lockout (page 108). The views and tools affected when lockout is used are detailed on page 114.

The System Lockout does not apply to employees who are associated with Employee Lockout rules.

Notes:

- Lockout periods do not apply to expenses.
- Lockout does not apply to Currency Exchange Rates.
- Applying a time lockout has an effect on the user interface and experience throughout the software. Many utilities normally available may be disabled, warning messages may appear and some toolbar buttons may not be displayed.
- The time of day the lockout occurs cannot be changed. It occurs at 12:01 a.m. after the day selected.
- When Lockout is configured, the Audit trail log is automatically enabled.

To create a system time lockout rule:

1. Select **Approval Workspace** from the menu (Menu > Views tab > Approval Workspace).
2. Select the **Time Lockout** tab near the top of the screen.
3. Select the **System** tab.
4. Select a **time lockout type** (manual or recurring) and **lockout date** as required.

About the lockout date:

The lockout date is the date **after which** time cannot be added (or edited), on or prior to the lockout date. For example, if you set the lockout date to the 15th day of the month, then beginning on the 16th day, time will be locked out for the 15th and earlier.

- **None:** Turn off System Lockout.
- **Monthly:** Lockout monthly after a specific date (example: 3rd day of the month) or a specific day of a specific week (example: 2nd Monday of the month).
- **Bi-Monthly:** Lockout after the 15th and last day of the month.
- **Bi-Weekly:** Lockout every 2 weeks starting after the selected date.
- **Weekly:** Lockout after a specific day of each week (example: Monday of every week).
- **Manual:** Lockout after a specific date - No recurrence.

You may set the manual lockout date to a future or past date. If you are setting a manual lockout to a future date, then you should also use the Last Lockout date field to lockout older time entries. The Last Lockout date is particularly important if this is the second time a manual time lockout is set.

5. Use the **Employee buffer** drop-down list to add some buffer time to the lockout date to permit time entry employees to enter and submit their time. (Not applicable for the Manual lockout option.)
6. Use the **Manager approval buffer** drop-down list to add some buffer time to the lockout date. This buffer time only applies to certain views in the Administrative areas of the software to give time to managers and administrators to review and approve the time data. (Not applicable for the Manual lockout option.)
7. (**Optional**) Click the **View Details** button to see time not submitted and time waiting to be approved for the period to be locked.
8. Click **Apply**.

The bottom portion of the view contains all active time lockout exceptions plus utilities to manually create or edit exceptions. Instructions for this part of the view begin on page [112](#).

Tips:

- To exclude an employee from the System Lockout, create an Employee Lockout rule (Manual) for the employee with a lockout date far into the future.
- You can setup a Job Scheduler Notification that will send out an e-mail notice to employees before the lockout date arrives (page [172](#)).

Employee lockout


The Employee configuration for Time Lockout allows a company to specify a date after which selected employees are not permitted to enter or submit time to the locked out period or to edit previously approved time for this same period. An employee lockout can be configured as a one-time event or can be configured as a recurring rule.

The Employee Lockout configuration is one of 2 types of possible time lockout implementations. The other is System Lockout. The views and tools affected when lockout is used are detailed on page [114](#).

Notes:

- An employee selected for an Employee Lockout is exempt from any System Lockout rule.
- An employee can only be associated with one Employee lockout rule.
- Applying a time lockout has an effect on the user interface and experience throughout the software. Many utilities normally available may be disabled, warning messages may appear and some toolbar buttons may not be displayed.
- Lockout periods do not apply to expenses.
- Lockout does not apply to Currency Exchange Rates.
- The time of day the lockout occurs cannot be changed. It occurs at 12:01 a.m. after the day selected.
- When Lockout is configured, the Audit trail log is automatically enabled.

To create an employee time lockout rule:

1. Select **Approval Workspace** from the menu (Menu > Views tab > Approval Workspace).
2. Select the **Time Lockout** tab near the top of the screen.
3. Select the **Employee** tab.
4. Click the **Add** button .
5. Enter a **name** for the lockout.
6. Select a **Time lockout type** (manual or recurring) and **lockout date** options as required.

About the lockout date:

The lockout date is the date **after which** time cannot be added (or edited), on or prior to the lockout date. For example, if you set the lockout date to the 15th day of the month, then beginning on the 16th day, time will be locked out for the 15th and earlier.

- **Monthly:** Lockout monthly after a specific date (example: 3rd day of the month) or after a specific day of a specific week (example: 2nd Monday of the month).
- **Bi-Monthly:** Lockout after the 15th and last day of the month.
- **Bi-Weekly:** Lockout every 2 weeks starting after the selected date.
- **Weekly:** Lockout after a specific day of each week (example: Monday of every week).
- **Manual:** Lockout after a specific date - No recurrence.

You may set the manual lockout date to a future or past date. If you are setting a manual lockout to a future date, then you should also use the Last Lockout date field to lockout older time entries. The Last Lockout date is particularly important if this is the second time a manual time lockout is set.

7. Use the **Employee buffer** drop-down list to add some buffer time to the lockout date to permit time entry employees to enter and submit their time. (Not applicable for the Manual lockout option.)
8. Use the **Manager approval buffer** drop-down list to add some buffer time to the lockout date. This buffer time only applies to certain views in the Administrative areas of the software to give time to managers and administrators to review and approve the time data. (Not applicable for the Manual lockout option.)

The 'Employees available' list box on the left contains all employees in the database. Those already assigned to an employee lockout rule have the name of the lockout rule appended to their names.

9. From the **Employees available** list, select the employees to apply to this rule and move them to the Employees assigned list using the arrow button located between the lists.
10. (**Optional**) Click the **View Details** button to see time not submitted and time waiting to be approved for the period to be locked.
11. Click **Done**.

The bottom portion of the view contains all active time lockout exceptions plus utilities to manually create or edit exceptions. Instructions for this part of the view begin on page [112](#).

Tip: You can setup a Job Scheduler Notification that sends out an e-mail notice to employees before the lockout date arrives (page [172](#)).

Lockout Exceptions

A Lockout Exception Request mechanism is available to managers and time entry users to request that a locked down period be opened. This mechanism is required for those occasions when errors have been made, when there are unexpected delays in submitting or approving time, etc.

How Lockout Exceptions work

From either the time entry tool or the Approvals view, an exception request is made via a toolbar button. The request is forwarded to the selected manager and is approved/rejected from the Approvals view in a manner similar to approving time or expenses. When the exception request is approved, the date range or sheet is unlocked for the employee and automatically closes on a date chosen by the approver. Because it is important that exception requests and approvals be handled in a timely manner, e-mail notifications are automatically sent when exception requests are submitted and approved.

There are 3 typical reasons why a period or sheet may need to be unlocked.

- A Time entry employee requests an exception to **enter or submit time** for a period that is locked. When the request is approved, the date range is opened to the employee.
- An Approving Manager requests an exception to **approve a timesheet** that is locked. In this situation, only the submitted sheet is opened and is only opened for the approving manager. The employee who submitted the time cannot modify the sheet. If the approving manager rejects the sheet, then it becomes available to the employee for editing.
- Other managers or administrators may require a period or a timesheet to be opened to **edit approved time entries** after a period has been locked. In limited areas of the software, changes can be made by an administrator without specifically creating an exception (e.g. adjust rates, bulk time move). However, in most administrative views and tools (Time Calendar, Holiday Time Entry, etc.), there are no built-in request mechanisms. In these situations, an administrator must manually create an exception from the Time Lockout view.

All exception requests are logged in the Audit trail. There is an exception history report that details all time entries entered during time lockout exceptions (Project Time Approved by Exception).


In Time Lockout Exceptions:

Exception request to approve time	page 111
Exception request to enter/submit time	page 111
Manually create a lockout exception.	page 112
Approving exception requests	page 113
Exception request e-mail notifications	page 113

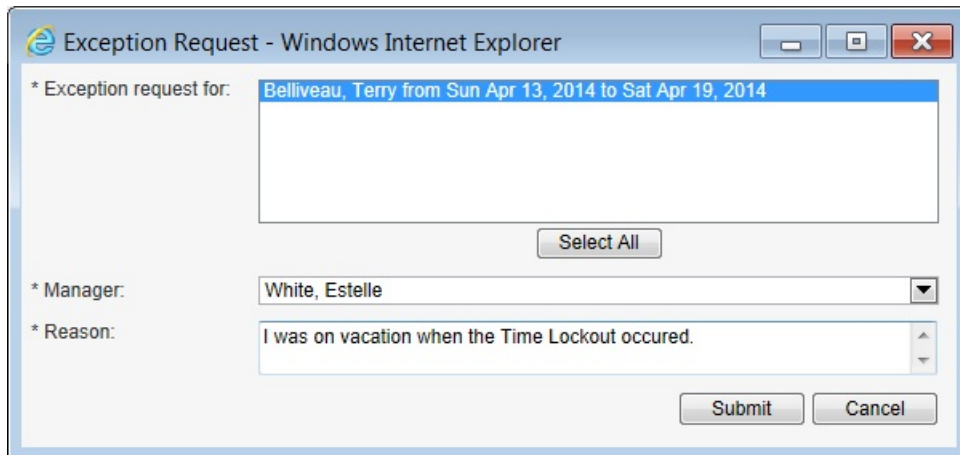
Exception Request to approve time

When a period is locked, any time that has been submitted but not yet approved is also locked down. The approving manager must request that another manager (or administrator) unlock the sheet so that it can be approved. The following details how to create a time lockout exception to approve time. If the approving manager has the appropriate security rights, he or she may bypass the exception request process and manually create an exception for the sheet (page 112).

Exception request to approve time:

1. Select **Approval Workspace** from the menu (Menu > Views tab > Approval Workspace).
2. Select the **Time & Expense Approval** tab near the top of the screen.
3. Click the **Exception Request** button  on the toolbar.
4. Select the sheet to open from the **Exception request for** list. More than one sheet can be selected.
5. Select to which **Manager** the exception request will be sent. This list is comprised of all users who have access to the Time Lockout view.
6. Enter a **Reason** for the request.
7. Click **Submit**.

The selected manager is sent an e-mail notifying him or her of the request. The selected manager must approve the request using the Approvals view (page 113).



Exception request to approve time

Exception Request to submit/enter time

When a period is locked, any time that has been entered but not submitted is locked down. Time can also not be added or edited in a period that is locked down. To enter and submit time, the time entry user must request that the period be unlocked.

The selected manager is sent an e-mail notifying him or her of the request and must approve the request using the Approvals view (page 113).

Instructions for employees to request an exception are found in the Time Entry section of the User's Guide - page 298.

Manually create a time lockout exception

Managers or administrators may require a period or a timesheet to be opened to **edit approved time entries** or time entry details after a period has been locked. For administrative views like the Actual Time & Costs or Time Calendar view, editing time entries that are locked requires that an exception be manually created by someone with access rights to the Time Lockout view. The following details how to create a manual time lockout exception.

Note: Information regarding exception requests is logged in the Audit trail.

Manually create a time lockout exception:



1. Select **Approval Workspace** from the menu (Menu > Views tab > Approval Workspace).
2. Select the **Time Lockout** tab near the top of the screen.
3. Select either the **System** or **Employee Lockout** tab.
4. In the **Active exceptions** area in the lower half of the view, click the **Add** button to open the Time Lockout Exception window.
5. Select an **Exception type**:
 - **Employee** to unlock a specific date range for one or more employees.
 - **Sheet** to unlock one or more submitted timesheets.
6. In the **Exception request for** list, select one or more employees or timesheets to unlock.
7. If the Exception type is 'Employee' (step 5), select the **date range** to open.
8. Select the date at which the exception automatically closes (**Auto close**).
9. (**Optional**) Enter a **reason** for the exception.
10. Click **Done**.

Manual time lockout exception

Approving Lockout exception requests

When an employee or approving manager submits a request to open a period or timesheet, the manager receiving the request must approve or reject the submission. The following details how to approve/reject a lockout exception request.

To approve/reject a lockout exception request:

1. Select **Approval Workspace** from the menu (Menu > Views tab > Approval Workspace).
2. Select the **Time & Expense Approval** tab near the top of the screen.
3. Select a **Time Lockout exception request** from the **To Be Approved** drop-down list.
4. Review the request details and adjust if necessary.
5. Select an **Auto close** date. This is the date the period/sheet will automatically 're-lock'.
6. **(Optional)** If approving the request, enter **additional instructions** for the person submitting the request. This is added to the e-mail automatically sent to the person who made the request.
7. To approve the request, click the **Approve** button  on the toolbar.
or
To reject the request, click the **Reject** button  and enter a reason for the rejection.

Notes:

- If the request is to unlock a timesheet, then the sheet automatically 'locks' when it is approved or at the Auto close date, whichever is first.
- Information regarding exception requests is logged in the Audit trail.

Lockout Exception Request e-mail Notifications

E-mails are automatically generated when Time Lockout exceptions have been requested, approved or rejected. Some changes can be made to the text displayed in the subject line or body of the e-mail.

List of exception request e-mail notifications:

- **Employee requests an exception:** Sent to the selected manager when a user requests a lockout exception from the time entry tool.
- **Manager requests an exception:** Sent to the selected manager when an approving manager requests a lockout exception from the Approval view.
- **Manager accepts the exception request:** Sent from the manager approving the exception to the user who made the request.
- **Manager rejects the exception request:** Sent from the manager rejecting the exception to the user who made the request.
- **Time with exception awaiting review:** Sent to the approving manager when a user submits a timesheet that was previously unlocked via an exception request.

To change the text in a notification e-mail:

1. Select the **Notifications** tab in the Time Lockout view.
2. Locate the notification to modify and click the **Change Notification text** link.
3. 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. New tags cannot be added, but existing tags can be removed.
4. Click the **Preview** button to see the applied changes.
5. Click the **Save** button.

Time Lockout - effects on views and tools

The following highlights the most significant effects on certain views and tools when Time Lockout is enabled.

Time Entry

Add/Edit Time Entries: time entry users are prevented from entering or editing time for those days that are locked.

Submit Time: time entry users are prevented from submitting time for those days that are locked.

An Exception Request can be generated from the Time Entry tool.

Approvals - When the timesheet falls within a Time Lockout period, the approve/reject buttons are not available. An Exception Request can be generated from the Approvals view.

Time Calendar

Monthly view: time entries that fall within a lock out period cannot be rejected.

Detailed view: time entries that fall within a lock out period cannot be edited, deleted, rejected or created.

Actual Time & Costs

The attempt to edit individual time entries that are locked down (via the entry's properties) is not permitted.

The attempt to edit multiple time entries that are locked down (via the Wizard) is only permitted for users with the appropriate Security option enabled (Time Lockout - Bulk Edit Override, page 224). Otherwise, only time that is 'unlocked' can be edited.

Overtime Rates

Employee Rate of Wages

Employee Rate Charged

Task Prorating

When modifying a rate, there are 2 options available to change the rate applied to approved/existing time entries. The attempt to edit rates, associated with time entries that fall within the lock out period, is only permitted for users with the appropriate Security option enabled (Time Lockout - Bulk Edit Override, page 224). Otherwise, only the rates that apply to 'unlocked' time entries are modified.

Approval Override - The approval override of a timesheet will not be permitted if time entries within the submitted sheet fall within the lock out period.

Bulk Time Move - The attempt to move time entries that are locked down is only permitted for users with the appropriate Security option enabled (Time Lockout - Bulk Edit Override, page 224). Otherwise, only time that is 'unlocked' is moved.

Holiday Time Entry - The attempt to add time entries, associated to employees that fall within the lock out period, is not permitted and the operation is cancelled.

Import/Export app (<http://www.dovico.com/apps.aspx>) - The attempt to import time entries, associated to employees that fall within the lock out period, is not permitted and the import operation is cancelled.

Delete - The attempt to deleted **employees, tasks or projects** that have associated time entries that are locked down is only permitted for users with the appropriate Security option enabled (Time Lockout - Bulk Edit Override, page 224).

Reports

Dovico Planning & Timesheet's comprehensive reporting tool gives you access to numerous 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 generated, compare budget vs. actuals, and so on.

With the additional ability to create custom reports, export reports in PDF, XLS, CSV, etc., schedule any report to be automatically run and e-mailed, Dovico Planning & Timesheet's **Reports** includes all the functionality required to suit your requirements.

This section of the guide details reporting functionality in the Administrative areas of the software. Instructions on reporting for time and expense entry users begins on page [311](#).

In Reporting ...


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Advanced functionality	
Calculated Columns	page 131
Schedule a report	page 134
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Report Security	page 135
Reports for time entry users	page 136
Import/Export reports	page 136
Manage Report Types.	page 137

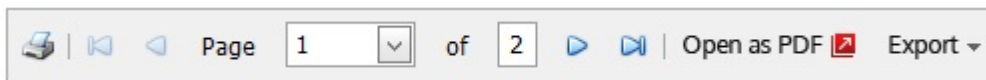
Run a report

By default, the Reports view is available to all administrative users of the software. Those users who only have access to time and expense entry tools have their own version of the Reports view (page 311), which has a reduced set of reports and functions.

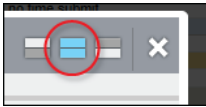
For those users with the appropriate security rights, the report designer functions permit changes to be made to reports. You may also create a new report from scratch. These options are detailed in other sections of this user guide (Modify a report - page 120, Create a new report - page 122).

To run a report:

1. Select **Reports** from the menu (Menu > Views tab > Reports).
2. Click on the Public, Private or My Favorites tab.
3. Locate the report to run and click its **Run** icon  at the far left of the screen.
4. If prompted, select the **projects, dates, currency, etc.**, from the filters presented and then click the **Run Report** button. Details on the various filters available are located below.
5. Use the available controls to print, page through, open as PDF or export/save the report (described next). If displayed in the toolbar, you also have the option to schedule the report to be automatically run and e-mailed (page 134).



You can return to the **Filters** at any time by clicking on the 'Show builder and report' button in the upper right corner of the screen.



To export (save) a report:

1. With the report showing in the Preview area, click the **Export** drop-down list near the top of the preview window.
2. Select in which **format** to save the report.
3. Depending on which web browser you are using, you are prompted with Download/Open, Save or Save As options. Select one to complete the export/save process.

Notes:

- The items that appear in filter lists (projects, tasks, etc.) in step 4 above are limited to only those items the user is permitted to view by their Security level and Limited Access.
- The **Company Name** shown in the report's footer is obtained from the text entered in the Company Name field in the Company Profile tab (Menu > Setup tab > Database Options).
- Your company's logo can be added to reports. (Setup > Database Options > Company Profile)
- **Pie chart** reports only show the 10 largest values as unique pieces. All additional values are grouped into an 11th piece labeled 'Others'.
- **Bar charts:**
 - If only 1 data set is selected as a column, then only the 5 top (highest) values are displayed in the chart as columns. All others are combined into a 6th column labeled 'Others'.
 - If 2 or more data sets are selected, then the report displays all as individual columns.

Report Filters

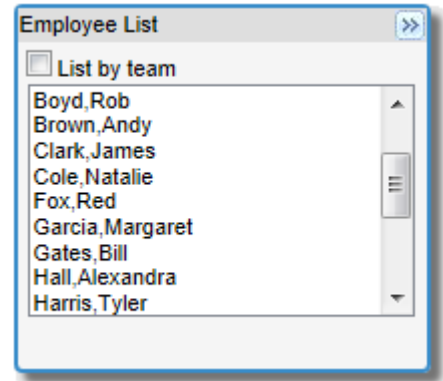
The following details all the possible filters available to those running a report, editing a report or creating a new one. Note that not all filters are available for each report type.

Note: A date filter is applied to the most popular report types.

List filters

List filters display all items in the database for the type of item selected. For example, the Project list filter displays all projects in the database. Also note that with Limited Access security, the end user only sees the specific items that he or she is permitted to view. For example, if Limited Access is applied to projects, each person seeing the project list filter only sees the projects permitted by his or her security level.

For project and employee filters, a checkbox is also displayed permitting you to switch how the list is organized. Example, instead of listing all employees alphabetically, you can see and pick from the list sorted by team.



Warning: Do not add the **Task filter** to your reports. Adding this filter will exclude tasks created in the Planning and Timesheet tool from appearing in your report.

Tip: When filters are displayed as lists (employees, projects, etc.), you may select multiple items by keeping the Ctrl key pressed while clicking on individual items, or use the Shift key to select a range of items.

Date filters: Used to change the dates from which the report returns information.

For Life- returns data from the entire database.

Date range - permits the user to select both From and To dates.

Current week/month/year - returns data from the current period selected. This selection also 'moves' with time so that if, for example, Current week is chosen, the report will return data for whichever week the report is run. This is important to consider when the report is to be saved for future use or if it is scheduled to be automatically run.

Previous week/month/year - similar as above.

Week/Month/Year to date: - this option returns data starting from the beginning of the current week, month or year and ends on the present date. This option is different from the 'Current week/month/year' option in that the 'to date' variation means that the data returns end on the day the report is run while the 'current' option returns data for the entire week, month or year. This difference is important if there exists data entered for future dates or on budget reports.

Custom week/month/year - this option permits the user to pick a custom week, month or year. This is similar to the 'Previous' option but with more flexibility to go back in the past. For example, if you select '-4Mths' and the current month is May, then the report will return data for the month of January. As with the Current/Previous date options described above, this option 'moves' with time. Continuing on this example, if the report is then run in June, the report's data will be for February.

From this option you may also pick a span of periods. For example, while keeping your Shift key pressed, you can click and drag your mouse over more than one selection to create a custom span.

Currency filter

The Currency filter is only displayed when Currencies are enabled. Select the currency used to display costs in the report.

Project Status filter

This filter permits the user to determine which projects to report on by their status (Active, Estimate, Finished, etc.).

Billable: Available for certain reports, use this option to report on items that are billable, non-billable or both (All).

Time Entry Status: To report on approved time, unsubmitted time, etc.

Expense Approval Status: To report on approved, unsubmitted expenses, etc.

Expense Category: To report on specific expense categories.

Custom Field option: Displayed for some items in the database, the Custom field lists any custom field entries for the type of item selected (time entry custom fields, task custom fields). Example; when a custom field is created to track extra information for each employee entered into the database, the 'custom_field_name (Custom Employee)' list displays the name of each custom field followed by the data entered for each.

Only those custom fields that have data entered in them are displayed in this list. For example; if an Employee custom field called "IT Skillset" has 3 possible selections (C++, Oracle and SQL) and only 2 have ever been selected for all the employees, then only the 2 appear as options that can be selected from the filter.

Timesheet Options - Show Overtime Entries Only checkbox: Available in certain time reports, check this option to only display time entries that have overtime rates applied.

Timesheet Options - Search on Description field: Available in certain time reports, it is used to only display time entries that have a description matching the text you enter in the Search field. Enter the exact text to search or use the '%' wildcard at the beginning and end of a word.

Note that if you use both of these options, only the results that match both options are returned (an AND operation).

Time Entered by Exception Only: To only display time entries that were entered during a Time Lockout period.

Timesheet Over/Under field: Available on the Employee Summary report only, this filter allows the report to display employees having more (or less) than the specified number of approved hours for the selected date range. It is very important to understand that the report's date range must be considered when entering the number of hours for this option. For example, if you set the Over Hours value to 40 and the report's date range is set to Today, then the report never returns any results.

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 (set in the employee's profile).

Projects Over Budget filter: Available for Budget and Actual type reports only, use this filter to report on the projects for which client costs are over budget, where company costs are over budget or report on the projects that have hours over budget.

Public, Private and Favorites

Reports are categorized as either Public or Private, and are organized using the tabs at the top of the view. If you are repeatedly running the same reports and you don't like to search through all the Public or Private reports, you can easily tag one or more reports as Favorites and make them available in My Favorites.



Public Reports – The Public Reports tab contains all the reports that are public to all administrative users who have access to the Reports view. Any private report can be made public by using the Publish button. By default, there are approximately 30 public reports available to all administrative users. Public reports may be restricted from some users if the report's security is adjusted accordingly (Report Security - page 135).

Private Reports – The Private Reports tab contains your own reports and are not available to any other user. Private reports can be copies of public reports, with or without modifications, or can be new reports created from scratch. Any new report that you create, or any public report that you duplicate, is automatically added to your private reports.


My Favorites – The My Favorites tab contains all the reports that you have tagged as Favorite. You may tag public or private reports as Favorites.

From any of these tabs, you can filter the list of reports by Name, Description or Type using the options near the top of the page. You may also sort the Name column by clicking the sort icon above that column.


To add a report to Favorites:

1. Select the **report**.
2. Click the **Add to favorites** button on the toolbar .

To **remove** a Favorite:

1. Click the **My Favorites tab** and select the **report**.
2. Click the **Remove from favorites** button on the toolbar .

To make a report public (publish):

1. Select the **Private** tab.
 2. Select the **report** to publish.
 3. Click the **Publish** button on the toolbar .
- When the report is published, it is moved to the **Public** tab.
 - Publishing a report makes that report available to all administrative users that have the same security group as you, along with all the users assigned to the Administrators security group. To make this Public report available to more security groups, go to Report Security (page 135).
 - To make a report available to time entry users via their reporting tab, see Reports for time entry users on page 136.

To unpublish a report:

1. Select the **Public** tab.
2. Select the **report** to unpublish.
3. Click the **Unpublish** button on the toolbar.
The report is moved to the Private tab.

Making small changes to a report


The following explains the simple changes you can make to a report without having to learn all the functions of the Report Builder. The following covers how to:

- Remove a column
- Move a column to a different place in the report
- Add a column
- Add a footer
- Adjust column widths
- Change the report's name or description

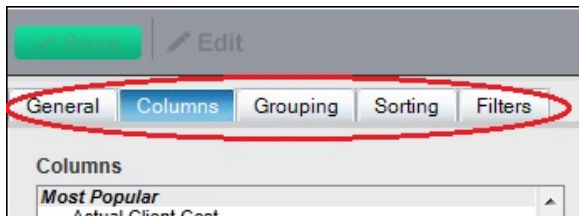
Important Note: There is no 'Save As' function when editing an existing report. When you are finished editing the report (whether a public or private report), your only options are to save and override the original report or to cancel all your changes. If you are not sure you want to overwrite an existing report, then make a duplicate (copy) of the report first and then edit the duplicate. Note that a select number of reports cannot be edited.

Editing a report:

All editing begins with the same instructions...

1. Select **Reports** from the menu (Menu > Views tab > Reports).
2. Click either on the Public or Private tab.
3. Select the report and click the **Edit** icon  located next to the report's name.


This brings up the **Report Builder** and its **5 tabs**.



The following explains how to make changes to Standard Type reports (the most common type used). Instructions for changes to other report types (Pie, Bar, Grid or Raw Data) vary slightly and can be easily figured out from the following examples and little bit of experimentation.

Remove a column

From the **Columns** tab.

- a. In the **Selected Columns** list box on the right, click on the **data field/column** to remove.
- b. Click the **Remove** arrow button  located between the lists.
- c. Click the **Run Report** button to see the change.
- d. Click **Save**.
- e. If editing a public report, you are prompted to override the original report.



Change the order of columns in a report

From the **Columns** tab.


- a. In the **Selected Columns** list box on the right, click on the **data field/column** to move.
- b. Use the **up/down arrow** buttons to re-position the column within the report. The topmost column is **displayed** at the far left of the report (unless Grouping is used).
- c. Click the **Run Report** button to see the change.
- d. Click **Save**.
- e. If editing a public report, you are prompted to override the original report.

Add a column


From the **Columns** tab.

- a. In the **Columns** list box on the left, locate and click on the **data column to add**. A complete list of column data fields is located in the software's help files. Launch the help files  and use the Index tab to locate the Report Default Columns topic.
- b. Click the **Add** arrow button  located between the lists to move the column to the Selected list.
- c. Use the **up/down arrow buttons** to position this new column within the report.
- d. Click the **Run Report** button to see the change.
- e. Click **Save**.
- f. If editing a public report, you are prompted to override the original report.

Add a footer

- a. Run the report.
- b. From the Preview toolbar, click the **Footer** button .
- c. Click the radio button next to the empty text box.
- d. Enter the **footer text** (95 characters maximum). Note that the footer is only applied to this report.
- e. Click **Apply**.
- f. Click **Save**.
- g. If editing a public report, you are prompted to override the original report.

Adjust column widths

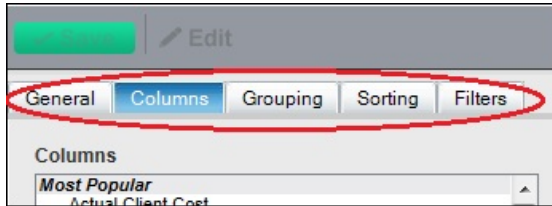
- a. Run the report.
- b. From the Preview toolbar, click the **Set Column width** button .
- c. For each report column, use either the **Auto width** option or manually type in a new width - in pixels.
- d. Click **Apply**.
- e. Click **Save**.
- f. If editing a public report, you are prompted to override the original report.

Change the report name or description

- a. Click on the **General** tab.
- b. Edit the Report **Name** and **Description** as required.
- c. Click **Save**.
- d. If editing a public report, you are prompted to override the original report.

Creating a new report

Creating a report from scratch is generally a simple task. And with some examination of existing reports and a little bit of trial-and-error, you will soon learn the more complex aspects of the Report Builder. You can create a report just for yourself (private), for other administrative users (public), or for those users who only use Dovico to enter time and expenses. In all these cases, the fundamental steps to create a new report are very similar and are contained in 5 tabs located in the Report Builder.




These steps are:

- Mandatory - From the **General** tab, enter a name for the report, select the type of report and how the data is displayed.
- Mandatory - From the **Columns** tab, select the data categories (columns, rows, data series) to display in the report.
- Optional - From the **Grouping** tab, select how the data is grouped within the report (by project, employee, task, etc.).
- Optional - From the **Sorting** tab, select how the data is sorted within columns in the report (ascending, descending).
- Optional - From the **Filters** tab, select the filters available to those users running the report (date range filters, list of employees, list of projects, etc.).

Note: Any new report you create is only available to you (Private) until you publish that report.

Tip: Instead of creating a new report from scratch, you should consider finding an existing report that has the data and formatting you are looking to create, making a copy (duplicate) of it and then modifying that copy.

To create a new report:

1. Select **Reports** from the menu (Menu > Views tab > Reports).
2. Click the **New Report** button on the toolbar.  **New**

On the **General** tab

3. Enter a **Name** for the report and optional **Description**. The report name should be unique.
4. (**Optional**) You may change the **orientation** of the report (Portrait or Landscape).
5. Select on **what type of data** to include in the report.
 - Time and Costs: This report type is primarily used to display the calculated costs generated by time entries. This report type limits data to the hours entered against projects and tasks that have been submitted and approved. Time entered but not submitted, or time waiting to be approved is not included in Time and Cost reports. Depending on how the data is displayed (standard, chart), you can show individual time entries with all their details, or choose to roll-up time entries. You can display their associated costs, proratings, pay or billing rates and other data used in calculating costs.
 - Budget and Actuals: This report type is similar to the Time and Costs type but includes budget/estimate information. This report type is primarily used to compare project budgeted time or budgeted costs against the actual data from approved time entries.

- **Time:** The Time type reports provide summary or detailed information on time entries against projects and tasks. You can report on time whether it is approved or not. All time entry costs and their factors (hourly rates, overtime rates, etc.) are excluded from this type of report.
- **Expenses:** Reports built using the Expenses type provide information on expenses for projects. You can report on expenses whether they are approved or not.
- **Time and Expense:** The Time and Expense report type is used to display costs data for both time and expenses. Only approved time or expenses are included in the data.
- **Lists:** The List type reports provide detailed properties of various items entered into the database (Client, Employee, etc.).


Note: A few built-in reports use a Data type not available to any user. For example, the Employee Time Summary report is built using one of these special data types.

6. Select how the **data is displayed** in the report.
 - **Standard:** These are 'typical' reports where data is shown in columns with the ability to group and sort the data. Most reports are built using the Standard display type.
 - **Pie:** Used to show the relative size of individual items that make up a total. Dovicco pie charts display up to 10 slices.
 - **Bar:** Used to compare data as values shown in the vertical axis with the data labels organized along the horizontal axis.
 - **Grid:** Used to group data in an easy-to-read grid format similar to a spreadsheet with totals displayed at the end of each column and row. Included is the ability to group the data (by project, team, etc.).
 - **Raw Data:** Used to display raw data in columns. Typically used to send data to Excel or other application.

7. Click the **Next** button or click on the Columns tab.

On the **Columns** tab


Tip: At any time while using the Columns tab, you can click **Run Report** to see your progress in building the report.

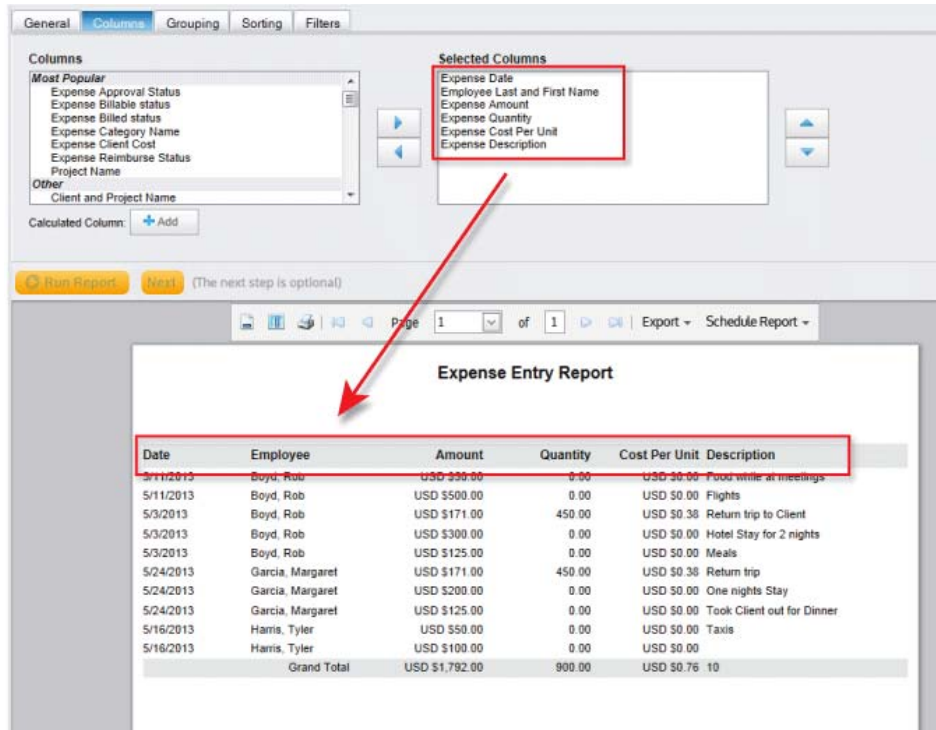
A complete list of column data fields is located in the software's help files. Launch the help files  and use the Index tab to locate the Report Default Columns topic.

8. Select the **data** to appear in the report.

Standard and Raw Data reports	page 124
Pie Chart report	page 125
Bar Chart report	page 126
Grid report	page 127

For Standard and Raw Data reports:

- Select the data columns to place in the report and move them  to the Selected Columns list. The most commonly used data columns are displayed at the top of the list.
- You can re-order the columns in the report by selecting the column name and clicking the up or down arrow buttons. The topmost item in the Columns selected list appears at the left in the report preview.



The screenshot shows the 'Columns' configuration window. On the left, under 'Most Popular', several columns are listed. On the right, the 'Selected Columns' list contains: Expense Date, Employee Last and First Name, Expense Amount, Expense Quantity, Expense Cost Per Unit, and Expense Description. A red arrow points from this list to the 'Expense Entry Report' preview. The report preview shows a table with the following data:

Date	Employee	Amount	Quantity	Cost Per Unit	Description
5/11/2013	Boyd, Rob	USD 300.00	0.00	USD 30.00	Food while at meetings
5/11/2013	Boyd, Rob	USD 500.00	0.00	USD 0.00	Flights
5/3/2013	Boyd, Rob	USD 171.00	450.00	USD 0.38	Return trip to Client
5/3/2013	Boyd, Rob	USD 300.00	0.00	USD 0.00	Hotel Stay for 2 nights
5/3/2013	Boyd, Rob	USD 125.00	0.00	USD 0.00	Meals
5/24/2013	Garcia, Margaret	USD 171.00	450.00	USD 0.38	Return trip
5/24/2013	Garcia, Margaret	USD 200.00	0.00	USD 0.00	One nights Stay
5/24/2013	Garcia, Margaret	USD 125.00	0.00	USD 0.00	Took Client out for Dinner
5/16/2013	Harris, Tyler	USD 350.00	0.00	USD 0.00	Taxis
5/16/2013	Harris, Tyler	USD 100.00	0.00	USD 0.00	
Grand Total		USD 1,792.00	900.00	USD 0.76	10

- The **Column Format** drop-down list is an advanced function and should not be modified unless Grouping is used. See page 128 for instructions on using the Column Format drop-down list.
- You have the option to add a **Calculated Column** in the report when there is a need to show data from a custom calculation. Details on adding a calculated column are found in Calculated Columns (page 131).

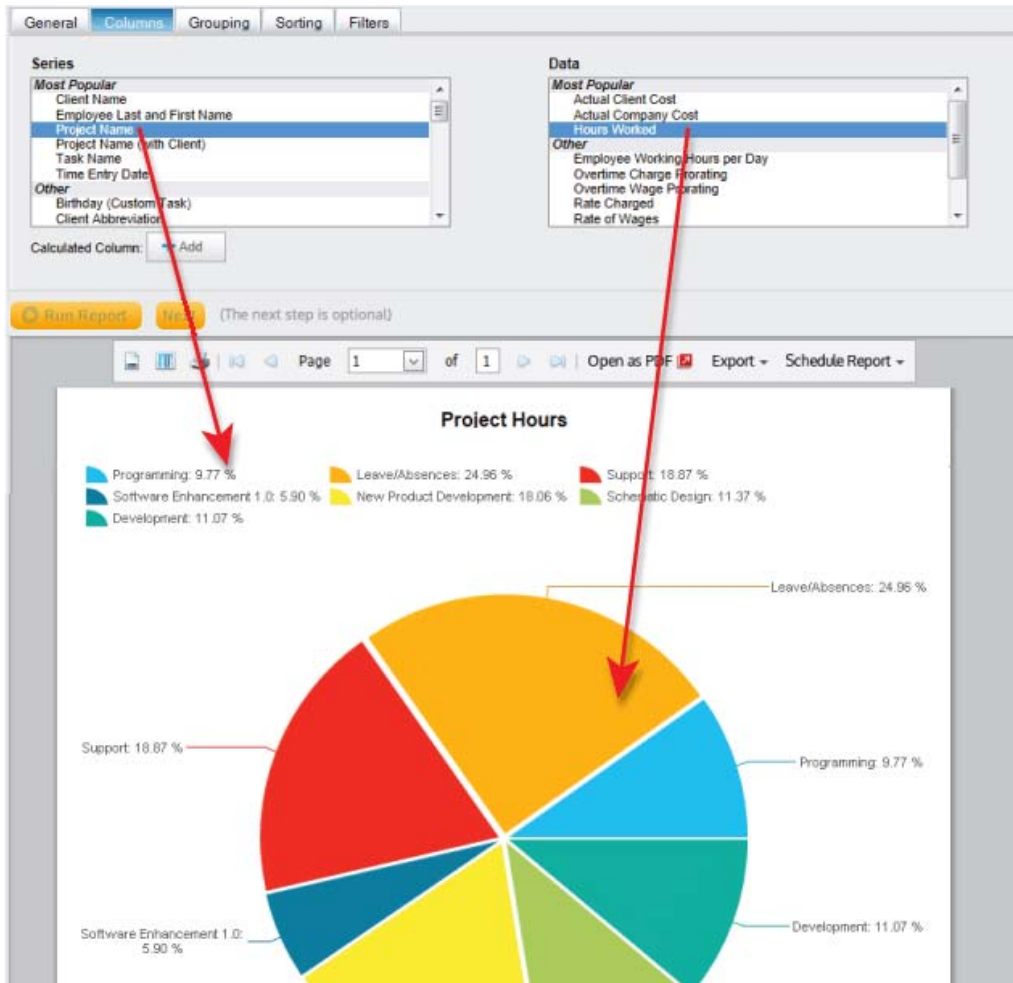
Click **Run Report** to preview the report. You may be required to select from filters automatically applied. If satisfied, go to **step 9** (page 127).

For Pie chart reports:

Example for a pie chart displaying total hours worked across projects.


- From the **Series** list box, select one item - select Project Name.
- From the **Data** list, select the data to be distributed (sliced up) - select Hours Worked

Click **Run Report** to preview the report. You may be required to select from filters automatically applied. If satisfied, go to **step 9** (page 127).



For Bar chart reports:

Example for a chart comparing client and company costs by project.

- From the **X-Axis** drop-down, select one category of data to display along the horizontal axis - select Project Name.
- Select the **data** columns to place in the report and move them  to the Columns Selected list - select Actual Company Costs and Actual Company Costs.

Click **Run Report** to preview the report. You may be required to select from filters automatically applied. If satisfied, go to **step 9** (page 127).



For Grid reports:

Select 1 item from each list box: Row, Column and Data:

- From the **Row** list box, select one category of item. The individual items from this category appear as row headings; Example; if you pick Task, then each individual task appears in a row.
- From the **Column** list box, select one category of item. The individual items from this category appear as column headings; Example; if you pick Employee, then each individual employee appears in a column.
- From the **Data** list box, select the data to report on.

The screenshot shows a report builder interface with three selection lists: Row, Column, and Data. Red arrows indicate the selection of 'Task Name' from the Row list, 'Employee Last and First Name' from the Column list, and 'Hours Worked' from the Data list. Below these lists is a 'Grid Report' table with the following data:

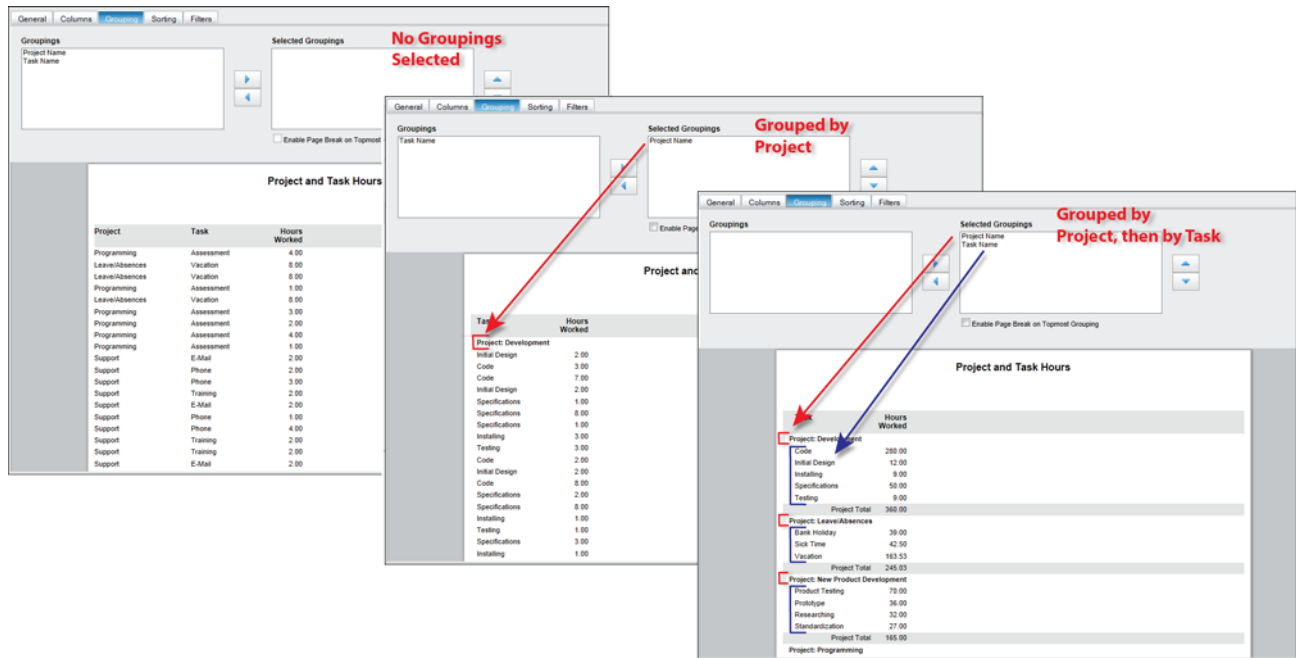
	Allen, Nathan	Boyd, Rob	Brown, Andy	Clark, James	Grand Total
Assessment	15.00	0.00	0.00	0.00	15.00
Code	0.00	10.00	0.00	8.00	18.00
Concept Plans	0.00	15.00	0.00	0.00	15.00
data manipulation	0.00	12.00	0.00	0.00	12.00
Design	0.00	0.00	10.00	0.00	10.00
E-Mail	0.00	14.50	0.00	0.00	14.50
Final design	0.00	3.00	3.00	0.00	6.00
Initial Design	0.00	4.00	0.00	0.00	4.00

9. **At this point** all the mandatory steps have been completed. You may click **Save** to close the Report builder. When saved, the report is placed in the Private tab. You may choose to publish it or keep it private (page 119).

(OPTIONAL) On the **Grouping** tab

The Grouping tab is primarily used to organize longer reports into a more convenient design or to roll up individual line items within a report. Reports are commonly grouped by project, task, employee, date, etc.

10. From the **Groupings** list on the left, select the items to group by and move them to the **Selected Groupings** list. The available list consists of those items selected in the Columns tab that can be logically grouped.
11. When grouping by more than one item, re-order the items using the up and down arrow buttons.
12. Optionally check the **Enable page break by topmost grouping** option (not available for some report types).



13. You can use the **Column Format** drop-down list (located in the Columns tab - page 124) to change the calculation used to display the data within the column.

- By default, when a numeric data column (hours, costs, etc.) is grouped, the individual line items of that group are rolled up and displayed as a **Sum** of the individual entries. Instead of showing the sum of the grouped data, you have the option to display the Min, Max, Average, etc., of that data set.
- By default, when a data column that displays text (names, descriptions, etc.) is grouped, the Column Format option is set to [None]. You have the option to change it to Count.
- The 'Formula' option is a special option useful when displaying the sum of the column's data at the bottom is not logical (see Column Format - Formula option on page 133).

- The image that follows is presented to highlight the different Column Format options. The image shows hours worked by project. The report is also grouped by project name so that the individual time entries are not displayed. The same data column (Hours Worked) is added 6 times, with each column having a different Column Format selection.

Sum: Displays the sum of the individual items in the grouping. In the image, the Schematic Design project has a total of 95.50 hours.

Count: Displays the total number of items in the grouping. In the image, the Schematic Design project has a total of 20 individual time entries.

Min/Max: Displays the minimum (or maximum) value from the grouping. The individual time entry with the smallest/largest number of hours.

Average: Displays the average value from the data within the grouping. The average hours across all individual time entries is 4.78 (95.50 hours /20 time entries).

Percentage: Converts each grouping within the column to a percentage of the entire column's total. Development = 30.08% (384/1276.53), Leave/Absences = 19.2% (245.03/1276.53), etc.

Column Format examples

Column Format Example report

Project	Hours Worked	Hours Worked (Sum)	Hours Worked (Count)	Hours Worked (Min)	Hours Worked (Max)	Hours Worked (Avg)	Hours Worked (%)
Development	384.00	384.00	50.00	1.00	23.00	7.68	30.08%
Leave/Absences	245.03	245.03	40.00	2.00	8.00	6.13	19.20%
New Product Development	165.00	165.00	26.00	1.00	12.00	6.35	12.93%
Programming	119.75	119.75	29.00	0.50	8.00	4.13	9.38%
Schematic Design	95.50	95.50	20.00	1.00	8.50	4.78	7.48%
Software Enhancement 1.0	69.25	69.25	12.00	3.25	8.50	5.77	5.42%
Support	198.00	198.00	81.00	1.00	4.00	2.44	15.51%
Grand Total	1276.53	1276.53	258.00	0.50	23.00	4.95	

(OPTIONAL) On the **Sorting** tab

The **Sorting** tab is used to change the order of data in a report. You can set from which column to sort by and set whether to sort ascending or descending.

- From the **Sortings** list on the left, select the items to sort by and move them to the Selected Sortings list. The available list is comprised of those columns previously selected that can be logically sorted.

Note: Any Grouping previously selected has priority over any Sorting.

- Use the **Sort Order drop-down** list to select how the data column is sorted: **Ascending** (0 to 9, A to Z) or **Descending**.
- When sorting by more than one item, re-order the items using the up and down arrow buttons.

(OPTIONAL) On the **Filters** tab

The **Filters** tab allows the report designer to pick which report filters are made available to the user running the report. For example, the report designer may choose to let the end user select projects, employees or a date range when running the report. As the report designer, you also have the ability to pre-select items and options for these report filters.

Note: A date filter is automatically added to the most popular report types.

- From the **Filters** list on the left, **select** and **move** a filter to the selected list.
- The filter and its options are displayed above the report preview area. By default, items or options may be preselected for you so that you may Preview the report.
- Click **Run Report** if required.
- A checkbox labeled '**Keep the filter picks made below when you save the report**' is placed above the applied filters. This checkbox is made available so that your filter picks can be saved with the report. If this box is not checked, the end user is required to select items or options from each filter applied when running the report.

Example using a Project list filter.

- If you've selected 3 projects from the project filter list and the 'Keep the filter selections..' box is **checked** when you click the **Save** button; then when the end user runs this report, the filter already has these 3 projects selected. The end user is still able to make changes to the filter before running the report.
- Under the same conditions, if the 'Keep the filter selections..' box is **unchecked** when you click **Save**, then the end user is required to pick at least 1 project from the project filter list.

21. A full list of all the filters and their functions can be found beginning on page [117](#).

22. Click **Save**. The report is now in the Private tab.

- a. You may choose to publish it, keep it private or make it a favorite.
- b. To make the report available to Time Entry users, follow the additional instructions in Reports for time entry users (page [136](#)).

Create a report for time entry users

Reports that appear to time entry users via the Reports tab in the time entry tool are unique, and as such, are handled differently from the reports available from the administrative side of the software.

These time entry user reports are different in the following ways:

- Users only get to see their own time and expense data.
- No costs related to time entries are displayed. Expense costs are shown.
- Only those reports that return employee time and expense information are available for time entry users. That is, reports that have an Employee List available in the report's Filters tab.

A number of reports are included by default, but you can always add more. If creating a new report, instructions are similar to building a new 'administrative' report (page [122](#)).

Advanced Functionality


Calculated Column

The Calculated Column function is available when you need to add a column showing data based on a formula that you define. String, mathematical and date functions and calculations are possible. You can create quite complex formulas using the built-in data fields and operators available in the user interface.

Simple examples:

- Add a column showing costs + 25%
- Add a column showing the difference between actual and budgeted costs, hours, etc.
- Combine 2 text strings together

To add a calculated column:

1. Select the report to modify and click the **Edit** button.
2. Click the **Add** button  located below the Columns list box.
3. Enter a **name** for the new column. This is the column heading shown in the report.
4. Select the **Data Type** to be used to display the result in the new column.
5. Build the **Formula** using the data fields from the Columns drop-down list along with the available operators (0-9, +, -, *, etc.).

Example of adding a column showing Actual Company Costs + 25%

- a. From the **Columns** drop-down list, select **Actual Company Costs**.
- b. Click the **Add to formula** button. Note: The column selected (from step a) is added to the Formula field at the position of your mouse's cursor.

This field is displayed in the Formula box.

- c. Click the multiply symbol '*' from the Operators keypad.
- d. Click '1.25' on the keypad.

The Formula appears as [Actual Company Cost]*1.25

- e. Click **Done**.
6. Click **Run Report** to see the results of the calculation.
 7. To make a change, click the **Edit** button and select the name of the calculated column.
 8. Be sure to **Save** the report when satisfied with the new column.

For those advanced users who know the database structure very well, you can type in your formula or SQL statement directly into the Formula window.

Notes:

- Note that calculated columns you create are report specific and cannot be shared across multiple reports. Some fields are not available because they were created for specific results such as the '% Complete', 'Billable %' and 'Non-Billable %' columns.
- Beware building a formula where a Divide by Zero result is possible: If you use the divide operator (/) in a calculated column, beware that any data field (costs, hours, etc.) used as the denominator that has a value of 0 will cause the report to return a 'Divide by Zero' error. Example; if your calculated column formula is 'budgeted costs/ actual costs' and there is a single time entry without an associated actual cost, then the report will fail to run. You can add terms to your formula to bypass divide by zero errors. See General Rules on the next page.

Tip: The Calculated Columns function is also useful if you don't like the name of a column as it appears in a report and want to change that name. In that instance, instead of adding the column for the Available list in the Columns tab, you create a Calculated Column, enter the name you want for the column in the Name field and pick that column from the Columns drop-down list.

Available Functions - The ability to type formulas, functions or statements directly into the Formula field allows a knowledgeable user to extend the basic controls and commands available from the Calculated Columns' user interface.

Warning: The following is intended for users with knowledge of SQL, SQL syntax and Dovico's database structure.

General rules:

- Calculated columns can be created for string, numeric and date fields.
- Field names must be encapsulated by square brackets [field_name].
- Text/string must be encapsulated by single quotation marks 'string of text'.
- Any calculated columns you create are report specific and cannot easily be shared. If the reuse of a formula is required, you have the option to use your browser's copy and paste functions.
- You can type your formula or SQL statement directly into the Formula window. You are encouraged to use the drop-down list for field names to ensure accuracy and consistency.
- You cannot directly type the name of a data field in the formula box unless that data field is defined for the report type (i.e. Displayed in Columns drop-down list).
- Divide by Zero: It is up to you to make sure that your formula does not result in a 'Divide by 0' or 'Null' return. To prevent Divide by 0 results, you can wrap your formula in a CASE statement such as shown in the following example: Calculate '% Work Completed' by dividing Hours Worked by Budgeted Hours when some items have a budget of 0 hours: CASE [Budgeted Hours] WHEN 0 THEN 0 ELSE [Hours Worked]/[Budgeted Hours]*100 END
- Your formula is validated against a limited data set. Errors may occur later when you run the report against the full database.
- The software performs general syntax checks for any mistakes.
- Error messages displayed are general in nature and it is up to the user to determine the root cause for any error.

Operators

"+", "-", "*", "/", "(", ")", "=", ">", "<", "!", "0", "1", "2", "3", "4", "5", "6", "7", "8", "9"

- Standard operation order rules are followed.

Functions

"CASE", "WHEN", "THEN", "ELSE", "END", "AND", "OR", "FLOOR", "CEILING", "ROUND", "SQRT", "PI", "ABS", "CONCAT", "LTRIM", "RTRIM", "SUBSTRING", "LEN", "DATEPART", "YEAR", "QUARTER", "MONTH", "DAYOFYEAR", "DAY", "WEEK", "WEEKDAY", "HOUR", "MINUTE", "DATEDIFF", "CAST", "CHAR", "VARCHAR", "AS", "INT", "FLOAT", "BIGINT", "DATETIME", "DATENAME", "RIGHT", "LEFT", "DECIMAL", "DATEADD", "CHARINDEX", "LOWER", "REPLACE", "UPPER", "DATE", "GETDATE" and "LIKE".

Argument

"MAX" - used to specify the maximum size of a 'varchar' data type.

Column Format - Formula Option

The 'Formula' option available in the calculated column pop-up window's Column Format drop-down list is a special selection made available when the calculated field result is a percentage (Data Type = Percent). It is designed to replace the Sum option when the sum of all the values in that calculated column is not logical. Using this option, instead of calculating a total using the data in the calculated field column, we apply the formula across the totals of each field within the formula. This option was primarily added for those situations where the calculated column returns a percentage value.

Notes:

- The Formula option is only available on calculated fields.
- Formula is the only option when the calculated field Data Type is set to 'Percent'.

Example when creating a calculated column that calculates the percentage completed (% Complete). The calculated field is labeled '% Complete' and the Data Type is set to Percent. The formula divides the Hours Worked by the Budgeted Hours. The formula also includes terms to prevent a divide by zero error.

The completed report is shown below. In this case, simply displaying the sum of the data at the bottom of the '% Complete' column would not make sense. The 'Formula' option (shown in the Column Format drop-down list) calculates the '% Complete' using the totals of the Hours Worked and Budgeted Hours columns (70 / 75 = 93.33%).

Employee	Hours Worked	Budgeted Hours	% Complete
Project: New Product Development			
Task: Product Testing			
Brown, Andy	14.00	17.22	81.30%
Gates, Bill	16.00	12.67	126.28%
Hall, Alexandra	11.00	20.56	53.50%
Walker, Jasmine	16.00	20.56	77.82%
Xavier, Jason	13.00	4.00	325.00%
Task Total	70.00	75.00	93.33%

Schedule a report

Once a report is run or previewed, you can save (export) it in various formats, or schedule the report to be automatically run and e-mailed to yourself or other recipients at regular intervals.

Prerequisite:

- The employees or clients scheduled to receive the report must each have an e-mail address entered in their respective properties windows.

Tips:

Before scheduling your report

- Beware of any costs or rates shown in your report and whether or not the recipients of the report should have access to this level of information. If necessary, you can always go back and create an alternate version of your report without sensitive information and schedule it to be automatically e-mailed.
- When filtering using a **Date filter**, most of the available options (For Life, Current Week, Current Month, etc.) will automatically advance in time for reporting jobs that are set to run daily, weekly or monthly. Example: if you select the 'Current Week' option in the report's Date filter and you also schedule the report to run Daily, Weekly or Monthly (step 12 below), the report returned will contain data for the week in which the report is run. The exception to this 'auto-advancing date range' rule is if the '**Date range**' option is selected. The dates selected in the '**Date range**' option are fixed and do not advance in time.

To schedule a report:

1. Run the report to e-mail.
2. With the report showing in the Preview area, click the **Schedule Report** button near the top of the preview window.
3. Select in which format to schedule the report.
The Job Scheduler window opens.

On the **Data (Step 1)** tab

4. From the Name drop-down, select '**Create a new job**'. You may also select from an existing Scheduled Reporting job.
5. Enter a **name** for this reporting job (up to 100 characters). This is the name displayed in the e-mail's subject line.
6. (**Optional**) Enter a **description** (up to 250 characters).

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

7. From the lists displayed on the left, select the **employees** or **clients** that will receive the e-mailed report and move them to the Employees or Clients selected lists using the **Move** button.

Someone missing from the list?: Only employees and clients with e-mail addresses entered in their respective properties windows are displayed in the lists.

8. **SKIP THE SMTP (Step 3) TAB.** Do Not Edit the information displayed in this tab.

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

9. Set the Run schedule properties. This establishes when the Job Scheduler runs the job.
 - **Once:** run once at a specified date and time
 - **Daily:** run once per day at a specified time
 - **Weekly:** run on one or more days of the week, at a specified time. Note: You may select more than one day from this drop-down list. Use this option to run jobs on weekdays only (e.g. run on Mon, Tue, Wed, Thu and Fri but exclude Sat and Sun).
 - **Monthly:** run once per month at a specified day and time

Note: If your local time is different from the time on the hosted server, then the server time is displayed in parentheses to the right of the time field.

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).

10. Click **Done**. The reporting job is now displayed in the Job Scheduler's list of jobs. (Menu > Setup > Job Scheduler)

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

Add a logo

You can add a logo or graphic to your reports.

Note: The preferred image size is 150 pixels wide by 60 pixels in height. A 2.5 width to height ratio. Larger images are resized proportionally. The following image types are permitted: bmp, gif, jpg, jpeg, tiff, tif and png. Maximum file size is 4MB.

Warning: The logo is not applied to some reports such as the Billing view report (Invoice), the Currency rate report and other reports that are not launched from the Reports view.

To add a logo:

1. Select **Database Options** from the menu (Menu > Setup > Database Options).
2. Click on the **Company Profile** tab.
3. Click the **Browse** button to upload the image.
4. Set the logo **position**.
5. Click **Apply**.

To **remove** the logo, set the **Position** to **None**.

Report Security

The Report Security tab is used to apply security to Public reports. For each Security Group that exists in the database, you are able to set which public reports are available to members of that security group. The Report Security tab is also the location where an Administrator can set a report to be made available to employees who only use the software to enter their time and expenses.

To adjust public report security:

1. Select **Security** from the menu (Menu > Setup tab > Security).
2. Select the **Report Security** tab.

The left side panel lists 2 categories:

Time & Expense users - Select this area to assign a public report to Time Entry only users via the Reports tab in their time entry tool.

Security Groups - Select this area to assign public reports to one or more security groups.

3. Select the Security Group or Time & Expense users area.
The right side panel displays all Public reports.
4. **Check** or **uncheck** the Allowed box as required for the group selected.
5. Click **Apply** in the upper right hand corner.

Tips:

- Sort or filter the list of public reports by using the options at the top of the view.
- You may multi-select Security Groups in the left side panel to make mass changes to security.

Make an existing report available for time entry users:**Prerequisite:**


- The report must be **Published**.
1. Go to the **Report Security tab** (Menu > Setup > Security > Report Security).
 2. Select **Time & Expense entry** under the Time & Expense users heading.
 3. Select the report and check the '**Allowed**' box.
 4. Click **Apply** (at the upper right).

Import/Export reports

The import/export report function is only required when importing a custom report developed by Dovico Professional Services, a custom report created by a 3rd party developer, or customizing and editing a report yourself outside of Dovico's built-in reporting abilities.

The following does not explain how to edit an exported report as this typically requires the expertise of a professional reports developer. The person who does edit a report must be comfortable editing xml data, have knowledge of SQL syntax, be familiar with the Dovico database structure, its security restrictions and how these relate to permissions. Please contact your Dovico Sales representative to inquire about Professional Services.


To export a report:

1. Select **Reports** from the menu (Menu > Views tab > Reports).
2. Click on the Report to export.
3. Click the **Export** button .

A .rep file is exported.
4. Depending on which web browser you are using, you are prompted with **Open** or **Save** options. Select one to complete the process.

The .rep file exported is a Dovico specific file format that can be opened with Notepad, or the file extension can be changed to .xml and then opened with an xml editor.

To import a report:

1. Select **Reports** from the menu (Menu > Views tab > Reports).
2. Click the **Import** button .
3. **Browse** to the .rep file's location.
4. Click **OK**.
5. The report is placed in the Private tab.

If the imported report is intended to be made public, then see 'Publish report' on page 119.

Manage Report types

For some of you, the built-in report types (data types) might not provide the flexibility your company requires for reports. For this situation, it is possible to import a custom report type built to your specifications. Although you cannot directly edit report types within the Dovico software, you can export any of the built-in report types, edit them and re-import them. The following explains how to import, export and delete report types. If you wish to import or export an individual report, then see [Import/Export reports](#) (above).



In its simplest description, a Report Type is a file that contains the data fields (columns) and parameters (filters) available to a report. There exists 6 basic Report Types in Dovico. Report Types management functions are only available to users with Administrator security rights.

Note: A few built-in reports use a Report type not available to any other user and therefore are not displayed in the Manage Report Types view. For example, the Employee Time Summary report is built using one of these special report types.

Custom Report types


If you have the skills, you can create your own report types and import them. The following does not explain how to edit or create a report type as this typically requires the expertise of a professional reports developer. The person who does create or edit report types must be comfortable editing xml data, have knowledge of SQL syntax, be familiar with the Dovico database structure, its security restrictions and how these relate to permissions. Please contact your Dovico Sales representative to inquire about Professional Services.

To export a Report Type:

1. Select **Reports** from the menu (Menu > Views tab > Reports).
2. Click the **Report Types** button on the toolbar .
3. Click on the Report Type to export.
4. Click the **Export** button .
A .rep file is exported.
5. Depending on which web browser you are using, you are prompted with **Open** or **Save** options. Select one to complete the process.

The .rep file exported is a Dovico specific file format that can be opened with Notepad, or the file extension can be changed to .xml and then opened with an xml editor.


To import a Report Type:

1. Select **Reports** from the menu (Menu > Views tab > Reports).
2. Click the **Report Types** button on the toolbar.
3. Click the **Import** button .
4. Browse to the .rep file's location.
5. Click **OK**.

Note: The report type's SQL is validated before it is imported.

To delete a Report Type:

Warning: Deleting a report type cannot be undone. If you delete a report type, any reports associated with that type will also be deleted. Although you can determine which public reports are linked to a report type (via Report Security), there is no method of determining which private reports are linked to a specific report type. As a precaution, you may want to export the report type and save the file before deleting it from the software.

1. Select **Reports** from the menu (Menu > Views tab > Reports).
2. Click the **Report Types** button on the toolbar.
3. Click on the **Report Type** to delete.
4. Click the **Delete** button on the toolbar  **Delete** .
5. Confirm the deletion by pressing **OK**.

Budgeting and Costing

Dovico Planning & 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 budgets.

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

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

In Budgeting and Costing ...

Budgeted Time & Costs	page 140
Actual Time & Costs	page 147
Currencies	page 151
Overtime Rates	page 160
Budgeted Expenses	page 162

Budgeted Time & Costs

The **Budgeted Time & Costs** view is primarily designed to create or update time and cost budgets for projects created in the Project Assignments view. The view can also be used with projects created in the Project Planning tool; however the view's editing features are restricted for this type of project.

As a review and reporting tool, the Budgeted Time & Costs view is useful for both types of projects.

Note that the terms '*estimate*' and '*budget*' are used interchangeably.

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

If enabled, the upper right corner of the screen has a **Currency** drop-down list which permits calculated costs to be reviewed in any enabled currency. The 'Display by Project Currency' option displays costs in the currency associated to the selected project.

Notes:

- When the project's Freeze budget costs option is checked (page 53), many editing functions related to costs are disabled.
- Expense budgets are prepared using the **Budgeted Expenses** view (page 162).
- Cost and rate details can be hidden from specific users by selecting the appropriate Cost Security options in the Security Groups view (page 223).

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 the software 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:

Estimated company cost = estimate hours x rate of wages

- Estimated hours: The estimated 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 employee's rate of wages field.

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

For each task assignment:

Estimated client cost = estimate hours x rate charged x task prorating

- Estimated hours: The estimated 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 employee's rate charged field.

You can display costs in any currency if the Currencies functionality is enabled. For client and company

costs calculations, each employee's estimated time costs are calculated and displayed using the exchange rates valid for the date the budget rate is set (page 53).

Displayed costs = Costs calculation as described above x exchange rate (for the currency being displayed) on the date the budget rate is set.


Tip: You can apply the same pay or charge out rate to an entire project (project based rate) regardless of the assigned task or employee by using the Budget Wizard (page 143).

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.
- If currencies are enabled and you plan to review budgeted costs in more than one currency, then set the budget date used for exchange rates for this project (page 53).

Tips:

- You can **review budget vs. actual statistics**  for any item in the Project Assignment's assignment tree (page 76).
- You can alternately create a single, total time estimate for an entire project using the **Project Estimate** total function (page 146).

1. Select **Budgeted Time & Costs** from the menu (Menu > Views tab > Employees & Projects > Budgeted Time & Costs).
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 202).

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 four 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'.

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 charged currency (if enabled): The currency selection is the currency stored for this time estimate. The value displayed in parentheses () is the calculated hourly rate using the currency selection made in the upper corner of the Budgeted Time & Costs view.

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.

Rate of wages currency (if enabled): The currency selection is the currency stored for this time estimate. The value displayed in parentheses () is the calculated hourly rate using the currency selection made in the upper corner of the Budgeted Time & Costs view.

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:

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 81).

ETC (h): The time estimated to complete the task. This value can be entered or edited by time entry users using the time entry tool. 'N/A' appears when no value has been entered and 'Complete' appears when the employee enters 0.

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 task **description**.

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

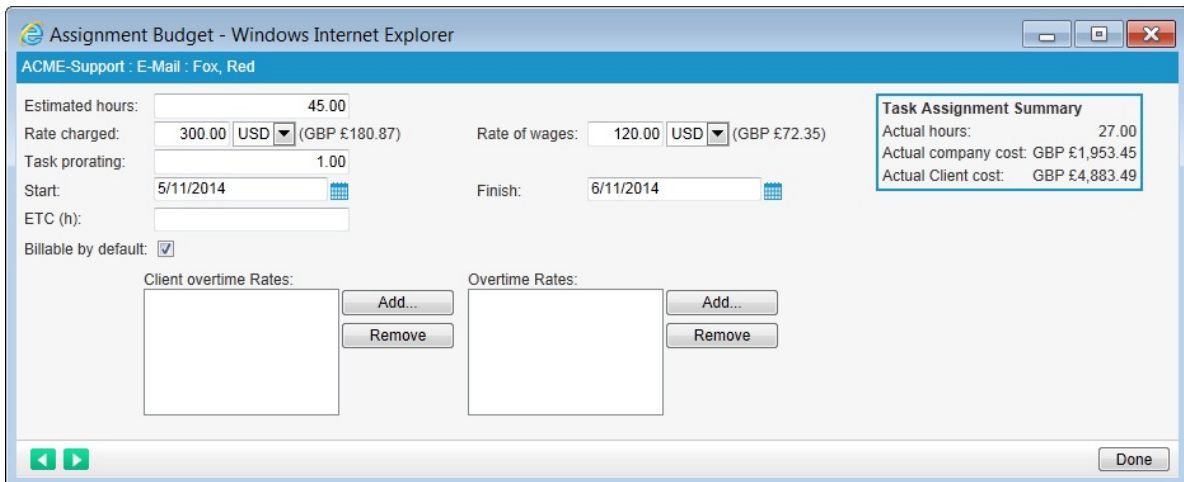
1. Click on the **task assignment** row to edit and click the properties button  on the toolbar.
2. **Add** (or edit) information in each field as required.

If editing the Rate Charged, Rate of Wages or Task prorating, then the link to the original source information for the rate is broken, and any updates to the source rate information is not transferred to the edited assignment.

Example: Bob is assigned to a task and his Rate of Wages (as established in his [employee profile](#)) is \$35/hour. You manually adjust the rate for this assignment to \$40/hour using the Budgeted Time & Costs view. Bob's Rate of Wages is later changed [in his profile](#) to \$45/hour. This new rate will not be applied to any assignments manually edited using the Budgeted Time & Costs view.

Notes:

- Rate, Cost and Overtime information is only available to users with appropriate security rights.
- Certain fields are not editable if the project is created using the Project Planning tool or if the project is linked to Microsoft Project.




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.

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


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

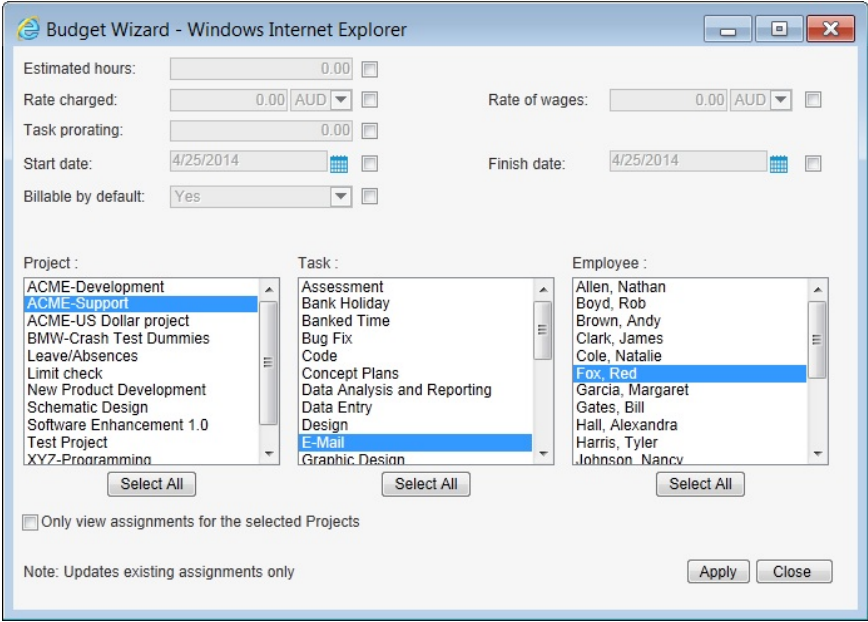
Task Assignment Summary

Actual hours:	27.00
Actual company cost: GBP	£1,953.45
Actual Client cost:	GBP £4,883.49

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

TIP: The budget wizard can also be used to apply the same rate to all assignments for a given project. See project based rate on page 145.

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 step 1.

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.

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

Estimated hours:	<input type="text" value="0.00"/>	<input type="checkbox"/>	Rate of wages:	<input type="text" value="0.00"/>	<input type="text" value="AUD"/>	<input type="checkbox"/>
Rate charged:	<input type="text" value="0.00"/>	<input type="text" value="AUD"/>	<input type="checkbox"/>			
Task prorating:	<input type="text" value="0.00"/>	<input type="checkbox"/>				
Start date:	<input type="text" value="4/25/2014"/>	<input type="checkbox"/>	Finish date:	<input type="text" value="4/25/2014"/>	<input type="checkbox"/>	
Billable by default:	<input type="text" value="Yes"/>	<input type="checkbox"/>				


When enabled, currency options are available for both rate fields. If modifying one or both rate fields, select the currency to be linked with all the assignment estimates selected.

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 Project Planning tool or Microsoft Project projects within the Task list, first select the project in the Project list and then check the 'Only view assignments for the selected Projects' box.
- For projects linked to Microsoft Project or to the Project Planning tool, certain fields cannot be modified.
- Rate information is only available to users with appropriate security rights.

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

To edit a single task assignment's estimated cost:



- Select the **project** from the Project drop-down list near the top of the view.
- 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.
- Click the task assignment **row** to edit.
- Click the **Properties** button  on the toolbar.
- 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.

- 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:

- 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:	403.00 / 236.40	Company cost: USD \$30,225.00 / USD \$9,736.00	Client cost: USD \$80,600.00 / USD \$24,090.00

Notes:

- Actual vs. Budget statistics are also available from the Project Assignments view (page 76).
- 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 administrator uses the Time Calendar view to enter time for an employee, time may be added against a task that 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 'line item' for this time entry is displayed in the Budgeted Time & Costs view's grid. This can explain why the sum of the hours in the Actual hours column may not add up to the actual hours displayed in the Project Summary area.
- Filtering 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 that are over budget on time:

Note: The budget filter determines which task assignments are over budget **on time**. To review task assignments that are over budget **on costs**, you can use one of the available **Project Time and 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 hours**.
or
Check the **Projected hours over budget** box to see all task assignments that have **Actual hours + ETC** greater than **estimated hours**.

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

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

To apply a project based rate:

Note: All task and employee assignments for the project should be completed before applying the project rate since creating additional assignments will not automatically use this project rate.

1. Select the **project** from the Budgeted Time and Costs view's Project drop-down list.
2. Click the **Budget Wizard** button  on the toolbar.

In the left side pane, the selected project is highlighted.

3. Check the **Only view assignments for the selected Projects** box to display only those tasks and employees assigned to this project.
4. **Select all** Tasks and all Employees.
5. Modify the **Rate Charged** (billing rate) or **Rate of Wages** (pay rate) as required by checking the box to the right of the field and entering the rate.
6. Modify other available fields if applicable.
7. Click **Apply** to update the budget information.

Note: 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.

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. estimated hours.

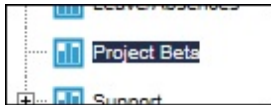
Warning: If estimated hours have been individually set using the Budgeted Time & Costs view, then using the Total Estimate Hours function will clear the individual values and evenly distribute the total hours across all task assignments.


Prerequisites:

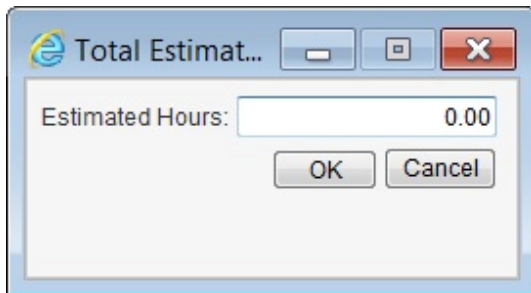
- A Project Estimate Total can only be entered for a project when that project's status is set to **Estimate**.
- Before entering estimated time for a project, you should complete all employee and task assignments for that project.

To enter total estimated hours for a project:

1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).
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.

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 Actual Time and Costs view displays, for the chosen project, each approved time entry as a line item in the grid. Because the number of time entries can quickly grow, you may need to use **paging** buttons  to view all time entries. You can also use the Task or Employee filters to reduce the amount of time entries in the grid.

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.

If enabled, the upper right corner of the screen has a Currency drop-down list which permits calculated costs to be reviewed in any enabled currency. The 'Display by Project Currency' option displays costs in the currency associated to the project.

Notes:

- Only approved time entries are displayed in the Actual Time & Costs view.
- Expense costs can be reviewed using the **Approved Expenses** view.
- Cost and rate details can be hidden from specific users by selecting the appropriate Cost Security options in the Security Groups view (page 223).

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 the software and in numerous reports. The following defines company and clients costs and explains how costs are calculated.

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

For each approved time entry:

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

- 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 wage value for 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.

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

For each approved time entry:

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

- 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 value 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.

You can display costs in any currency if Currencies functionality is enabled. For client and company costs calculations, each employee's time entry costs are calculated and displayed using the exchange rates valid for the day of the time entry.

Displayed costs = Costs calculation as described above x exchange rate (for the currency being displayed) on the day of the time entry.

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

1. Select **Actual Time & Costs** from the menu (Menu > Views tab > Actual Time & Costs).
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:	403.00 / 236.40	Company cost: USD \$30,225.00 / USD \$9,736.00	Client cost: USD \$80,600.00 / USD \$24,090.00

Notes


- Actual vs. Budget statistics are also available from the Project Assignments view (page 76).
- Detailed actual vs. estimate reports are available from the **Reports** view.
- Filtering 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. Select **Actual Time & Costs** from the menu (Menu > Views tab > Actual Time & Costs).
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 202). You may need to click the **paging** buttons (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 reduce 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.

When enabled, currency options are available for both rate fields. The currency selection is the currency stored for this time entry. The value displayed in parentheses () is the calculated hourly rate using the currency selection made in the upper corner of the Actual Time & Costs view. In the sample image shown below, the employee is paid 40.00 USD per hour for this time entry. This project's rates and costs are calculated and displayed in Euros.

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



The screenshot shows a web browser window titled "Actual Time and Costs - Windows Internet Explorer". The address bar shows "ACME-Support : Training : Thomas, Anthony : 4/8/2014". The main content area displays a form for editing task cost factors. On the left, there are five input fields: "Task prorating:" (1.00), "Rate of wages:" (40.00 USD, EUR €28.89), "Rate charged:" (200.00 USD, EUR €144.46), "OT wage prorating:" (1.00), and "OT charge prorating:" (1.00). On the right, a "Task summary" box shows "Estimated hours: 40.00", "ETC: N/A", and "Actual hours: 18.00". At the bottom, there are navigation arrows and a "Done" button.

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 Project Planning tool or 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.
- When the software's Time Lockout is enabled, the attempt to edit time entries, associated to employees that fall within the lock out period, is not permitted and the operation will be cancelled. With the appropriate security rights, mass updates can be accomplished using the Actuals Wizards (see below).


Task Summary details

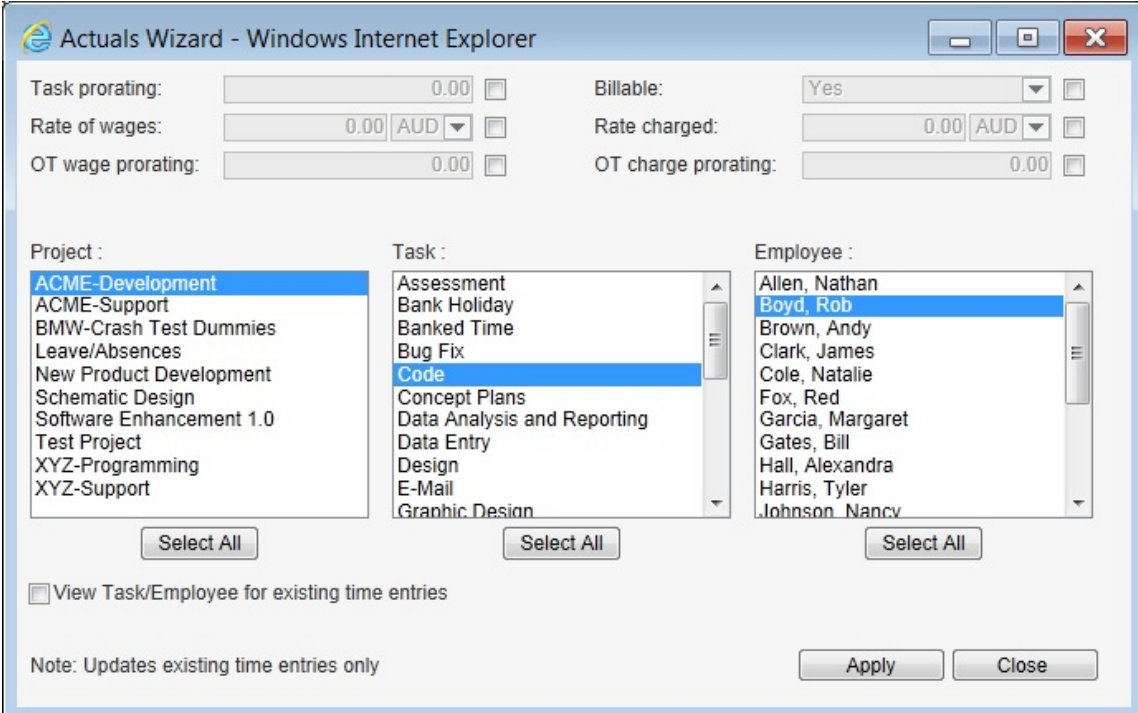
Estimated hours: The total estimated hours required to accomplish this task.

ETC: The number of remaining hours estimated 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. Select **Actual Time & Costs** from the menu (Menu > Views tab > Actual Time & Costs).
2. Click **any** task assignment **row**.
3. Click the **Actuals Wizard** button  on the toolbar.



Actuals Wizard - Windows Internet Explorer

Task prorating: Billable:

Rate of wages: Rate charged:

OT wage prorating: OT charge prorating:

Project : Task : Employee :

View Task/Employee for existing time entries

Note: Updates existing time entries only

Buttons: Select All, Apply, Close

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 step 2.

The 3 list boxes initially display all available projects, tasks and employees. To only view a project's task assignments that 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.

Task prorating:	<input type="text" value="0.00"/>	<input type="checkbox"/>	Billable:	<input type="text" value="Yes"/>	<input type="checkbox"/>
Rate of wages:	<input type="text" value="0.00"/>	<input type="text" value="AUD"/>	<input type="checkbox"/>	Rate charged:	<input type="text" value="0.00"/>
					<input type="text" value="AUD"/>
OT wage prorating:	<input type="text" value="0.00"/>	<input type="checkbox"/>	OT charge prorating:	<input type="text" value="0.00"/>	<input type="checkbox"/>



When enabled, currency options are available for both rate fields. If modifying one or both rate fields, select the currency to be linked with all the time entries selected.

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 Project Planning tool or the Budgeted Time & Costs view.
- To display the tasks linked to Project Planning tool or Microsoft Project projects within the Task list, first select the project linked 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.
- When Time Lockout is enabled, the attempt to edit multiple time entries that are locked down will only be permitted for users with the appropriate Security option enabled (Time Lockout - Bulk Edit Override, page 224). Otherwise, only time that is 'unlocked' can be edited. Edits made to time entries that are locked are recorded in the Audit trail.

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 223).
- 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 .

Currencies

What is Currencies?

Currencies is an optional feature of the software making currency selections available so that expenses, employee wages, and other data contributing to costs can be entered in any of the enabled currencies. This feature also permits costs to be viewed in any currency within the software.

The Currencies view is the location where an administrator establishes which foreign currencies are enabled, their exchange rates and exchange rate periods. Once Currencies are enabled, the user interface is modified permitting currency selection where applicable.

Do you need to use Currencies?

Currencies should be used if you have employees that are paid in different currencies or have expenses that are purchased in foreign currencies, and you want to administer, compare and review these costs.

If there is no need for more than one currency, then Currencies can be disabled if already enabled. If not enabled, then no further actions are required and the following instructions can be ignored. All data entered into the software will use the currency defined by the software's Regional Settings. Currencies can always be enabled later if the need arises.

How Currencies works

In general, an **Administrator** determines which currencies are made available and sets their exchange rates. For **managers** and empowered employees, a currency selection option is made available when entering any rate value used to calculate costs (employee hourly rates, etc.). When reviewing costs in certain views and reports, these same currency options are available. For **all users**, a currency selection option is available when entering expenses.

For each currency enabled, two important factors must be established. (1) The **exchange rates** that are applied to time and expense data. (2) The **exchange rate periods** that define when the exchange rates are applied. Exchange rate periods can be daily, weekly, monthly or any period you choose.

Instead of manually entering exchange rate data when the need arises, you can automatically retrieve exchange rates from OANDA's Foreign Exchange Rate Services at no charge.

In Currencies ...

Initial Setup	page 152
How to review costs in different currencies	page 156
Managing Currencies and Exchange Rates	page 157
FAQs	page 159

Setting up Currencies

This section describes (1) how to enable the Currencies functionality for the first time and (2) how to add or remove a currency from the system. To completely disable the use of Currencies throughout the software, see [Disable All Currencies](#) (page 158).

Enable Currencies Functionality

1. Select **Currencies** from the menu (Menu > Setup tab > Currencies).
2. Verify that the **Active Currencies tab** is selected.
3. Check the **Enable Currencies** box.
4. Click the **Add Currencies** button.
5. **Select** at least 2 currencies from the list. Click **OK**.
6. Select one of the currencies as the **Default**. If you have existing rates and expenses in the database, then this selection should correspond to the currency in which these were entered. This default currency is also used by the software as the currency selection when a new project or employee is added to the database, and for other administrative purposes.
7. Click the **Next** button below the list of enabled currencies.

The following instructions establish the Exchange Rates for each currency selected.

8. Enter the exchange rates **manually in the grid**.
or
Click the **Get exchange rates** button to obtain data from OANDA Exchange Rate Services.
 - Optionally modify the **Date**.
 - Click **Go**. You have the option to manually edit the exchange rates retrieved from OANDA.
9. Click the **Apply** button.

	AUD	CAD	EUR	GBP	JPY	USD
1 AUD=	1.00000	1.00750	0.68200	0.55500	94.33460	0.92780
1 CAD=	0.99290	1.00000	0.67710	0.55100	93.65420	0.92110
1 EUR=	1.46650	1.47730	1.00000	0.81380	138.32300	1.36050
1 GBP=	1.80230	1.81550	1.22900	1.00000	169.98800	1.67190
1 JPY=	0.01060	0.01068	0.00723	0.00588	1.00000	0.00984
1 USD=	1.07800	1.08580	0.73510	0.59820	101.67700	1.00000

A FEW STEPS REMAIN

At this point, Currencies functionality has been enabled throughout the software. When cost related data is now entered into the system (employee hourly rates, expenses, etc.), the data is stored with the currency selected by the user. When an employee enters time, that employee's rate of wages (pay) and rate charged (billing) currencies are used to calculate costs for that time.

If you had data in the software before Currencies were enabled, you may want to review the employees, projects, etc., that already exist in the database. However, if the Default currency is acceptable for all existing items, then no further action is required until there is a need to enable an additional currency, to modify one or more exchange rates currently in use, or to establish a new exchange rate period with new exchange rates.

Review currencies assigned to employee rates (page 154)

Review currencies assigned to projects (page 154)

Review currencies assigned to other items (page 155)

Notes:

- The data retrieved from **OANDA** is the 'Interbank Ask' average rate (page 159).
- Exchange Rate periods
 - When establishing exchange rates for the first time, the exchange rates are applied to all existing time and expense items. You have the option to apply different exchange rates to existing data by creating a historical exchange rate period (page 158).
 - You cannot set an End date for the Current Exchange Rate period or create an Exchange Rate period that begins in the future.
- Base Currency?
 - Dovico does not use a Base Currency to convert costs. The software uses cross-rate conversions (currency pairs). Using cross-rate conversions allows 2 foreign currencies to be directly converted without the rounding errors inherent when both have to be first converted through a base currency.
- A maximum of 50 currencies can be enabled.
- The **Currency Names** and **Codes** are defined by the ISO 4217 standard and cannot be modified. The **Currency Symbol** can be modified by clicking in the grid's cell and editing the value.

Name	Code	Symbol	Default	
Australian Dollar	AUD	AUD \$	<input type="radio"/>	Deacti
Canadian Dollar	CAD	CAD \$	<input type="radio"/>	Deacti
Euro	EUR	EUR €	<input type="radio"/>	Deacti
Japanese Yen	JPY		<input type="radio"/>	Deacti
Pound Sterling	GBP	GBP £	<input type="radio"/>	Deacti
US Dollar	USD	USD \$	<input checked="" type="radio"/>	Default

Enable an additional currency

1. Select **Currencies** from the menu (Menu > Setup tab > Currencies).
2. Verify that the Active Currencies tab is selected.
3. Click the **Add Currencies** button.
4. **Select** the currency to add. Click **OK**.
5. Click the **Next** button.

Warning: If exchange rates that exist in the grid were manually entered or edited, then the Get Exchange Rates button (for the next step) should be used with caution. This is because the Get exchange rates button retrieves exchange rates for all currencies in the grid based on the date field and overwrites any exchange rate that were manually entered or edited.

6. Enter the exchange rates **manually in the grid**.
or
Click the **Get exchange rates** button.
7. Click the **Apply** button.


Note: If you have Historical Exchange Rate periods, the newly added currency and its current exchange rates are applied to each historical exchange rate period. If required, the historical exchange rates for the new currency can be adjusted manually (page 157).

Remove a currency

1. Select **Currencies** from the menu (Menu > Setup tab > Currencies).
2. Verify that the **Active Currencies** tab is selected.
3. In the list of Enabled Currencies, select the **Deactivate** link for the currency to remove.
4. Click the **Apply** button.

Note: A currency that is associated to any project, rate or expense cannot be removed. If you wish to remove a currency already associated to one or more items, then these items must be located and assigned to a different currency. These can be Employees' hourly rates, Projects, unsubmitted Expenses, Expenses awaiting Approval, Approved Expenses, Budgeted Expenses, Expense Categories, Actual Time & Costs rates, Budgeted Time & Costs rates, Project Alerts, Skillset and Placeholder rates.

Review currencies assigned to employees


1. Select **Items List** from the menu (Menu > Views > Employees & Projects > Items List).
2. Select **Employees** from the drop-down list.
3. If not displayed, add the **Rate of Wages** and **Rate Charged** columns to the grid using the **Show/Hide** toolbar button .
4. Review the currency selection for each employee rate.
5. To edit a rate's currency, **right click** on the employee and select **Properties**.
6. Review the employee's hourly **Rate of wages** (pay rate) value and **Currency**. For example, 25.00 USD or 16.50 GBP. By default, any changes made to the rate or currency are only applied to future time entries. To apply changes to time entries already submitted and approved, click the **More** button.

Warning: If modifying an employee's Currency selection, the rate value should be adjusted accordingly. Example, if modifying an employee pay rate from 30.00 USD to British Pound (GBP), the hourly rate value should be changed accordingly (example; 19.00 GBP). Otherwise calculated costs for existing time and existing budgets could be affected dramatically.

7. Review the employee's hourly **Rate charged** (billing rate) value and **Currency**. The **More** button, as described in step 6, is also displayed when the employee's rate charged value or currency is modified.
8. Click **Done**.

Review currencies assigned to projects

Assigning a currency to a project has 2 purposes.

- **When viewing costs:** The currency assigned to a project is the currency in which costs are viewed when the 'Display by Project Currency' option is selected in the upper right corner of the view.
 - **For billing:** A project's currency is the currency used when preparing an invoice in the software's Billing view.
1. Select **Items List** from the menu (Menu > Views > Employees & Projects > Items List).
 2. Select **Projects** from the drop-down list.
 3. If not displayed, add the **Currency** column to the grid using the **Show/Hide** toolbar button .
 4. Review each project's currency selection.
 5. **To edit** a project's currency, **right click** on the project and select **Properties**.
 6. From the Currency drop-down list, select the **currency** for the project.

7. **(Optional)** Modify the default Budget exchange rate date setting (page 53). This is set to prevent a project's **budgeted costs** from automatically changing when currency exchange rates are modified.
8. Click **Done**.

Review currencies assigned to other items

The following is specifically written for the situation when a default currency has been applied to all relevant items that already exist in the database, and that this default selection is not applicable for some of these items. The following is the list of items within the database where the default currency is applied. You may review and update these if the need arises.

Employee and project reviews are described on the previous page and therefore excluded from this list.

- Project Planning tool projects: For each project, review the rates applied to each task assignment, each skillset and to each placeholder assignment.
- Approved Expenses: For each expense sheet, review the currency for the Amount Entered.
- Unsubmitted Expenses: For each employee, review the currency for the Amount Entered.
- Expenses awaiting approval: For each expense sheet, review the currency for the Amount Entered.
- Actual Time & Costs: For each project, review the rate and currency applied to each time entry.
- Budgeted Time & Costs: For each project, review the rate and currency applied to each task assignment.
- Expense Categories: Review each Expense Category that is tracked as a Quantity.
- Budgeted Expenses: For each project, review each budgeted expense.
- Project Alerts: For each project alert triggered by a cost threshold, review the default currency.

Reviewing costs in different currencies

From many administrative views, you are able to review time and expense costs in any of the enabled currencies. This currency selection is normally set using the Currency drop-down list located in the upper right corner of the screen.

Expanding the drop-down list reveals each available currency, plus the option to view in the currency assigned to the project. Similar options are available when running many of the cost related reports.

The option, selected in one Currency drop-down list, will be applied to all other views containing the Currency drop-down list.

The screenshot shows a 'Project Statistics' window with the title 'Project Statistics - Windows Internet ...'. A red box highlights the 'Currency: US Dollar - USD \$' dropdown menu. Below it, a table titled 'New Product Development' displays cost data. Another red box highlights the 'Company Cost' and 'Client Cost' rows, which show values in USD.

	Actual	Budgeted	Percentage
Hours:	159.00	215.00	73.95 %
Company Cost:	USD \$11,040.00	USD \$16,120.00	68.49 %
Client Cost:	USD \$28,600.00	USD \$41,600.00	68.75 %
Remaining			
Hours with ETC:	185.00	215.00	30.00
Billable Non-Billable % Billable			
Billable Hours:	159.00	0.00	100.00 %

The screenshot shows an 'Actual Time & Costs' report. A red box highlights the 'Currency: Pound Sterling - GBP £' dropdown menu. The report includes a 'Project Summary' table and a detailed task breakdown table. Red boxes highlight the currency selection and the cost columns in the task breakdown table.

Task - Employee	Duration	Company Cost	Client Cost	Rate of Wages	Rate Charged
Assessment - White, Estelle	2.50	GBP £120.57	GBP £376.80	GBP £48.23	GBP £150.73
Assessment - Allen, Nathan	4.00	GBP £192.92	GBP £602.88	GBP £48.23	GBP £150.73
Assessment - Richards, Terry	7.00	GBP £0.00	GBP £0.00	GBP £0.00	GBP £0.00
Assessment - White, Estelle	6.50	GBP £313.50	GBP £979.68	GBP £48.23	GBP £150.73
Concept Plans - Richards, Terry	6.00	GBP £0.00	GBP £0.00	GBP £0.00	GBP £0.00
Assessment - Allen, Nathan	4.00	GBP £0.00	GBP £0.00	GBP £48.23	GBP £150.73
Assessment - White, Estelle	5.00	GBP £241.15	GBP £753.60	GBP £48.23	GBP £150.73
Assessment - Allen, Nathan	3.00	GBP £144.69	GBP £452.16	GBP £48.23	GBP £150.73
Concept Plans - Richards, Terry	8.00	GBP £0.00	GBP £0.00	GBP £0.00	GBP £0.00
Assessment - White, Estelle	2.00	GBP £96.46	GBP £301.44	GBP £48.23	GBP £150.73
Concept Plans - Richards, Terry	7.50	GBP £0.00	GBP £0.00	GBP £0.00	GBP £0.00
Concept Plans - Richards, Terry	6.75	GBP £0.00	GBP £0.00	GBP £0.00	GBP £0.00
Assessment - Allen, Nathan	2.00	GBP £96.46	GBP £301.44	GBP £48.23	GBP £150.73
Assessment - White, Estelle	2.00	GBP £96.46	GBP £301.44	GBP £48.23	GBP £150.73
Concept Plans - Boyd, Rob	3.00	GBP £72.36	GBP £180.87	GBP £24.12	GBP £60.29
Concept Plans - Richards, Terry	2.00	GBP £0.00	GBP £0.00	GBP £0.00	GBP £0.00
Assessment - White, Estelle	2.00	GBP £96.46	GBP £301.44	GBP £48.23	GBP £150.73
Assessment - Richards, Terry	7.75	GBP £0.00	GBP £0.00	GBP £0.00	GBP £0.00
Concept Plans - Richards, Terry	7.50	GBP £0.00	GBP £0.00	GBP £0.00	GBP £0.00
Assessment - Allen, Nathan	1.00	GBP £96.46	GBP £301.44	GBP £48.23	GBP £150.73

Managing Currencies and Exchange Rates

Editing exchange rates in the current period

Warnings:

- When editing existing exchange rates, the Get Exchange Rates button should be used with caution. The Get Exchange Rates button retrieves exchange rates for ALL currencies in the grid and overwrites any exchange rates entered manually.
- Any Time Lockout periods are ignored when modifying exchange rates.

1. Select **Currencies** from the menu (Menu > Setup tab > Currencies).
2. Verify that the **Current Exchange Rates** tab is selected.
3. Click the **Edit current rate period** button.
4. Manually edit one or more of the current exchange rates, or use the Get Exchange rates button to update all the exchange rates.
5. Click **Apply**.

Starting a new exchange rate period

When starting a new exchange rate period, the period currently in use is automatically closed. The newly closed period's exchange rates are stored in the Historical tab.

1. Select **Currencies** from the menu (Menu > Setup tab > Currencies).
2. Verify that the **Current Exchange Rates** tab is selected.
3. Click the **Start new rate period** button.
4. Set the **Start Date** for the new period.
5. You may **Copy** all the exchange rates from the previous period and then edit manually, or **Get exchange rates** from OANDA, or enter each **manually**. The Copy feature is useful when only a few of the existing exchange rates need to be updated for the new period.
6. Click **Apply**.

Editing exchange rates in historical periods

Warning: Modifying exchange rates in historical (closed) periods changes actual (approved) and budgeted costs in the period.

1. Select **Currencies** from the menu (Menu > Setup tab > Currencies).
2. Verify that the **Historical Exchange Rates** tab is selected.
3. Select the period to edit from the '**Exchange rate periods**' drop-down list. The exchange rates period list displays all historical periods. The current period is not displayed.
4. Click the **Edit rates for this period** button.
5. **Edit** rates as required.
6. (**Optional**) Modify the dates for this historical period.
7. Click **Apply**.

Creating a new historical exchange rate period

This feature is available to insert a new historical period within the existing history of exchange rates. It may be useful after currencies are first enabled and there already exists a large quantity of time and expenses in the database.

Example: The history contains exchange rate periods for each month. There is a need to make the last 2 weeks of September unique - with different exchange rates.

1. Select **Currencies** from the menu (Menu > Setup tab > Currencies).
2. Verify that the **Historical Exchange Rates** tab is selected.
3. Select the **Create new historical period** button.
4. Enter **Start** and **End** dates for the new historical period (example; Sept 15 and Sept 30).
5. **Get exchange rates** from OANDA, or enter each **manually**.
6. Click **Apply**.

Disabling the use of all Currencies

The following details how to completely disable the use of Currencies throughout the software. To simply remove one or more individual currencies, see Remove a Currency (page 154).

Warnings:

- All existing cost data assigned to a currency is permanently converted using the Default Currency's exchange rates.
- After disabling Currencies, all costs are displayed using the currency symbol designated by your Regional Settings (page 210). For this reason, it is **critical** that the Default Currency correspond to your Regional Settings. For example, if the Default currency established in the Currencies view is Euro €, then your Regional setting should correspond to a country/region using the Euro symbol (€).
- All currencies and exchange rates are deleted.
- All historical data detailing which currency and exchange rates were used for each item is deleted.

1. Select **Currencies** from the menu (Menu > Setup tab > Currencies).
2. Verify that the **Active Currencies** tab is selected.
3. Clear the **Enable Currencies** check box.
4. Click **Apply**.
5. Acknowledge the **Warning** message.

Currencies FAQs

Can I...

Enable currencies after the software has been in use for a while?

Yes. Currencies can be enabled after the system has been in use. Any expenses and rate-based costs existing in the database are assigned to the Default currency you select when you enable Currencies. The exchange rate values entered when initially setting up Currencies are applied to all existing time and expenses. You have the option to split up this existing data (by month, year, etc.) by creating Historical Exchange Rate periods.

Create a custom currency?

No. A custom currency cannot be created. However, the currency symbol, which is used in many views, can be modified.

Other questions

Where do I setup my Base currency?

The software does not use a Base Currency to convert costs. Cross-rate conversions are used (currency pairs). Using cross-rate conversions allows 2 foreign currencies to be directly converted and compared without the rounding errors inherent when both have to be first converted through a base currency.

What is the Default Currency?

The default currency selected is used by the software to associate costs that already exist in the software when Currencies are first enabled. It is also used as the default currency when a new employee, project, etc., is added to the database, and for other administrative purposes such as importing and exporting data.

What is OANDA?

OANDA is a trusted source for currency data. It has access to one of the world's largest historical, high frequency, filtered currency databases. <http://www.oanda.com>

Dovico provides free access to OANDA's foreign exchange rates when populating your exchange rate table.

The data retrieved from **OANDA** is the average 'Interbank Ask' rate rounded to 5 decimal places. For each rate, the data returned is based on the 24 hour period ending on the previous day at 6PM EST (2200 UTC). Real-time exchange rates are not available using this service.

Why can't I find the currency I'm looking for?

All currencies are supplied via OANDA. OANDA tries to keep the list of countries and exchange rates up to date for all currencies where there is reliable data available from financial institutions.

Overtime Rates

Overtime Rates are used to establish a prorating (multiplier), which 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 an employee, then the employee is able to select the "Time and ½" rate when working overtime.

Example: Mary has a \$150/hour Rate Charged value and has the "Time and ½" overtime rate (1.5) assigned to it. When Mary submits 2 overtime hours on a billable project, the client cost is calculated as $\$150 \times 1.5 \times 2 \text{ hours} = \450 .



- Overtime rates are not applied automatically. They must be manually selected by the employee tracking time.
- Overtime rates can be general (double time) and assigned to all employee rates or can be specific (ACME project weekend rate) and assigned to only one employee 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. Select **Overtime Rates** from the menu (Menu > Views tab > Overtime Rates).
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 is 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. Ignore the **More** button if you are creating a new Overtime Rate. The More button is used when editing an existing Overtime Rate prorating and you want to backdate existing proratings applied to this Overtime Rate.
5. (**Optional**) Enter a **description** (up to 250 characters) - 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** .

NEXT

This overtime rate must now be **assigned to one or more employee rates** (page 64).

Note: The number of overtime rates displayed in the view is limited by the **Paging** setting (page 202). 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**.
- 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 backdate the change (page 83).

Note: When Time Lockout is enabled, attempts to edit rates associated with existing time entries that fall within the lock out period will either be denied or further options will be made available for those individuals with the appropriate security rights. Additional details can be found in 'More' (page 83).

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. **VERY IMPORTANT:** Click **Save**  .

Budgeted Expenses

Dovico 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 approved expenses throughout the project lifetime.


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

If enabled, the upper right corner of the screen has a Currency drop-down list which permits calculated costs to be reviewed in any enabled currency. The 'Display by Project Currency' option displays costs in the currency associated to the 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, rate-based **expense categories** must be created.

To add a budgeted expense:





1. Select **Budgeted Expenses** from the menu (Menu > Views tab > Employees & Projects > Budgeted Expenses).
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**) Modify the expense **date** using the calendar button .
5. (**Optional**) Select an **expense category**.
6. Enter an **Amount** or **Quantity** for the budgeted expense.
 - The **Quantity** field is only available if the expense category selected in step 5 has been set up as a rate-based expense category.
 - If available, select the **currency** used to budget for the expense. The exchange rate used to calculate the Converted Amount is determined by your administrator.
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 202). You may need to click the **paging** buttons (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.

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 as submitting or approving time and expenses.

In Automated Functions...

Automated E-mail Notification Overview	page 164
Time and Expenses Awaiting Approval	page 165
Assignment Notifications	page 166
Employee Incomplete Timesheet Notifications	page 168
Manager Incomplete Timesheet Notifications.	page 170
Time Lockout Period Notifications	page 172
Project Alerts	page 174
Custom E-mail Notifications	page 177
Automated Reporting	page 178
Changing text shown in e-mails.	page 179

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-mails to **approving managers** when time/expenses are **awaiting their approval**. To help with getting time and expenses approved in a timely manner, two options are available when you want managers to receive e-mails when they have time to approve.
 - a. Configure the software so that managers receive an **instant e-mail** for each submitted time or expense sheet. (page [67](#))
 - b. Configure the software to send **one periodic (batch) e-mail** containing summary information for all sheets awaiting their approval. (page [165](#))

- Send e-mails 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, which alert them to the rejected time/expenses, both parties (approving managers and employees) can resolve any problems in an effective manner. (page [67](#))

- Send e-mails 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 Billable time has reached 'X' number of hours
 - and more... (page [174](#))

- Send e-mails to employees detailing their **project assignments**. Assignment notifications inform the selected users about the projects and tasks that are assigned to them. (page [166](#))

- Send e-mails to **employees** when their **timesheets are incomplete** (under minimum hours). Incomplete Timesheet Notifications alert the users when their timesheets are incomplete based on a specified number of hours. (page [168](#))

- Send e-mails to **managers** when **employee timesheets are incomplete**. The Manager Incomplete Timesheet Notification alerts managers when employees have not completed their timesheets. (page [170](#))

- Send e-mails to employees notifying them that a **time lockout period** is approaching (page [172](#)).

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 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 67).

Sample e-mail sent to approving managers

Timesheet(s):		
Employee	Sheet Name	Date Range
Allen, Nathan	Allen, Nathan from Sun Jan 05, 2014 to Sat Jan 11, 2015	1/6/2015 - 1/7/2015
Clark, James	Clark, James from Sun Jan 05, 2014 to Sat Jan 11, 2015	1/6/2015 - 1/6/2015
Cole, Natalie	Cole, Natalie from Sun Jan 05, 2014 to Sat Jan 11, 2015	1/6/2015 - 1/7/2015

To create a time & expenses awaiting approval notification:

1. Select **Job Scheduler** from the menu (Menu > Setup tab > Job Scheduler).
2. Select **Notification** from the drop-down list at the top left corner of the screen.
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 179).

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).

9. **SKIP** THE SMTP (Step 3) TAB. Do Not Edit the information displayed in this tab.

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

10. Set the **Run** schedule properties.
 - **Once:** run once at a specified date and time
 - **Daily:** run once per day at a specified time
 - **Weekly:** run on one or more days of the week, at a specified time. Note: You may select more than one day from this drop-down list. Use this option to run jobs on weekdays only (e.g. run on Mon, Tue, Wed, Thu and Fri but exclude Sat and Sun).
 - **Monthly:** run once per month at a specified day and time

Note: If your local time is different than the time on the hosted server, then the server time is displayed in parentheses to the right of the time field.

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 by the Project Planning tool or 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 1/1/2014 to 1/31/2014			
Project	Task	Start Date	Finish Date
ACME-Development	Assessment	1/2/2014	5/6/2014
ACME-Development	Bank Holiday	1/2/2014	5/6/2014
ACME-Development	Code	1/2/2014	5/6/2014
ACME-Development	Concept Plans	1/2/2014	5/6/2014
ACME-Development	Data Entry	1/2/2014	5/6/2014
ACME-Development	E-Mail	1/2/2014	5/6/2014

To create an assignment notification:

1. Select **Job Scheduler** from the menu (Menu > Setup tab > Job Scheduler).
2. Select **Notification** from the drop-down list at the top left corner of the screen.

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 179).

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

- 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

- SKIP** THE SMTP (Step 3) TAB. Do Not Edit the information displayed in this tab.

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

- Set the **Run** schedule properties.
 - **Once:** run once at a specified date and time
 - **Daily:** run once per day at a specified time
 - **Weekly:** run on one or more days of the week, at a specified time. Note: You may select more than one day from this drop-down list. Use this option to run jobs on weekdays only (e.g. run on Mon, Tue, Wed, Thu and Fri but exclude Sat and Sun).
 - **Monthly:** run once per month at a specified day and time

Note: If your local time is different than the time on the hosted server, then the server time is displayed in parentheses to the right of the time field.

- 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 do not contain a specified minimum number of hours.

Sample e-mail sent to employees

Your timesheet between 12/19/2013 and 12/25/2013 may be incomplete.	
Submitted hours:	31.75 hrs
Unsubmitted/rejected hours:	0.00 hrs
Expected hours:	37.50 hrs
Hours missing:	5.75 hrs
Please verify that an appropriate amount of time has been submitted for this period.	

To create an employee incomplete timesheet notification:

1. Select **Job Scheduler** from the menu (Menu > Setup tab > Job Scheduler).
2. Select **Notification** from the drop-down list at the top left corner of the screen.

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

The following settings apply for the Custom Range option:

Report for a total of **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 on June 20th to employees whose timesheets from June 10 to 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 179).

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.

10. **SKIP** THE SMTP (Step 3) TAB. Do Not Edit the information displayed in this tab.

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

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

- **Once:** run once at a specified date and time
- **Daily:** run once per day at a specified time
- **Weekly:** run on one or more days of the week, at a specified time. Note: You may select more than one day from this drop-down list. Use this option to run jobs on weekdays only (e.g. run on Mon, Tue, Wed, Thu and Fri but exclude Sat and Sun).
- **Monthly:** run once per month at a specified day and time

Note: If your local time is different than the time on the hosted server, then the server time is displayed in parentheses to the right of the time field.

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 that lists employees who do not have a specified minimum number of hours.

Sample e-mail sent to managers

The following Employees may have incomplete timesheets for the following date range: 23/01/2015 - 29/01/2015

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. Select **Job Scheduler** from the menu (Menu > Setup tab > Job Scheduler).
2. Select **Notification** from the drop-down list at the top left corner of the screen.

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 e-mail.

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

The following settings apply for the Custom Range option:

Report for a total of **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 on June 20th to the 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. 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 179).

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).
11. **SKIP** THE SMTP (Step 3) TAB. Do Not Edit the information displayed in this tab.

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

12. Set the **Run** schedule properties.
 - **Once:** run once at a specified date and time
 - **Daily:** run once per day at a specified time
 - **Weekly:** run on one or more days of the week, at a specified time. Note: You may select more than one day from this drop-down list. Use this option to run jobs on weekdays only (e.g. run on Mon, Tue, Wed, Thu and Fri but exclude Sat and Sun).
 - **Monthly:** run once per month at a specified day and time

Note: If your local time is different than the time on the hosted server, then the server time is displayed in parentheses to the right of the time field.

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).

Time Lockout Period Notification

The Job Scheduler's Time Lockout Period Notification feature provides the ability to send e-mails to users when a Time Lockout end date is approaching.

Sample e-mail sent to employees

Your current time lockout period will close in 5 days.

Please ensure all time is entered and submitted before day end on Sunday, April 11, 2015.

To create a time lockout period notification:

1. Select **Job Scheduler** from the menu (Menu > Setup tab > Job Scheduler).
2. Select **Notification** from the drop-down list at the top left corner of the screen.

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 **Lockout Period Notification** from the Notification Type drop-down list.
6. Select the number of days the e-mail is sent before the Lockout date arrives. For example: if the lockout is set for the 30th of the month, setting a 5 day notice means that the notification will be sent on the 25th.
7. (**Optional**) Modify the text shown in the e-mail by clicking on the **Change Notification Text...** link (page 179).

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

9. **SKIP** THE SMTP (Step 3) TAB. Do Not Edit the information displayed in this tab.

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

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

Warning: When notifying employees about recurring period lockouts (weekly, bi-weekly, etc.), we recommend that the **Daily** run option be used. Other run options may not coincide with recurring lockout periods.

- **Once:** run once at a specified date and time
- **Daily:** run once per day at a specified time
- **Weekly:** run on one or more days of the week, at a specified time. Note: You may select more than one day from this drop-down list. Use this option to run jobs on weekdays only (e.g. run on Mon, Tue, Wed, Thu and Fri but exclude Sat and Sun).
- **Monthly:** run once per month at a specified day and time

Note: If your local time is different than the time on the hosted server, then the server time is displayed in parentheses to the right of the time field.

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).

Project Alerts

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 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 the software's help system.

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:

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:

- 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.
- 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 Friday.
- Expense related alerts are calculated using company expense costs and not client expense costs.

To create a project alert:


1. Select **Job Scheduler** from the menu (Menu > Setup tab > Job Scheduler).
2. Select **Notification** from the drop-down list at the top left corner of the screen.
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.
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 179 for details on editing the e-mail text.

Note: 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.

14. **SKIP** THE SMTP (Step 3) TAB. Do Not Edit the information displayed in this tab.

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

15. Set the **Run** schedule properties.
 - **Once:** run once at a specified date and time
 - **Daily:** run once per day at a specified time
 - **Weekly:** run on one or more days of the week, at a specified time. Note: You may select more than one day from this drop-down list. Use this option to run jobs on weekdays only (e.g. run on Mon, Tue, Wed, Thu and Fri but exclude Sat and Sun).
 - **Monthly:** run once per month at a specified day and time

Note: If your local time is different than the time on the hosted server, then the server time is displayed in parentheses to the right of the time field.

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

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 new trigger level is reached.

There are circumstances when the alert's trigger is reset automatically. These situations can occur when changes are made to budgets, actuals or any of the criteria that 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 of how retriggering works: An alert is scheduled to be run every Friday. Previously, the alert limit had been reached and the e-mail notification sent.

- **Will** retrigger if the budget is modified on Monday and the new value is reached any time after Friday.
- **Will not** retrigger if the budget is modified on Monday and the new value is reached by Thursday of the same week. This is because the alert did not go through one scheduled run time where the calculation was below the alert's limit.

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. These could be special messages/reminders to employees, etc.

To schedule a custom e-mail notification:

1. Select **Job Scheduler** from the menu (Menu > Setup tab > Job Scheduler).
2. Select **Notification** from the drop-down list at the top left corner of the screen.
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.

8. **SKIP** THE SMTP (Step 3) TAB. Do Not Edit the information displayed in this tab.

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

9. Set the **Run** schedule properties.
 - **Once:** run once at a specified date and time
 - **Daily:** run once per day at a specified time
 - **Weekly:** run on one or more days of the week, at a specified time. Note: You may select more than one day from this drop-down list. Use this option to run jobs on weekdays only (e.g. run on Mon, Tue, Wed, Thu and Fri but exclude Sat and Sun).
 - **Monthly:** run once per month at a specified day and time

Note: If your local time is different than the time on the hosted server, then the server time is displayed in parentheses to the right of the time field.

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

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).

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, XLS, RTF or CSV, etc.

To create an automatic reporting job:

1. Select **Job Scheduler** from the menu (Menu > Setup tab > Job Scheduler).
2. Select **Reporting** from the drop-down list at the top left corner of the screen.
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 displayed 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 view. **Locate** and **double click** on the report and select the **reporting filters** as required.

Notes:


- Beware of any costs or rates shown in your report and whether or not the recipients of the report should have access to this level of information. If necessary, you can always go back and create an alternate version of your report without sensitive information and schedule it to be automatically e-mailed.
- When filtering using a **Date filter**, most of the available options (For Life, Current Week, Current Month, etc.) will automatically advance in time for reporting jobs that are set to run daily, weekly or monthly. Example: if you select the 'Current Week' option in the report's Date filter and you also schedule the report to run Daily, Weekly or Monthly (step 12 below), the report returned will contain data for the week in which the report is run. The exception to this 'auto-advancing date range' rule is if the '**Date range**' option is selected. The dates selected in the '**Date range**' option are fixed and do not advance in time.

6. When the report is displayed, click the **Add to Report job** button and select the **export format**.

The report is now displayed in the list of Reports to be sent.

7. (**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.
8. Add additional reports as required (step 5).
9. (**Optional**) Modify the text shown in the e-mail by clicking on the **Change Notification Text...** link (page 179).

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

10. 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

11. **SKIP** THE SMTP (Step 3) TAB. Do Not Edit the information displayed in this tab.

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

12. Set the **Run** schedule properties.
 - **Once:** run once at a specified date and time
 - **Daily:** run once per day at a specified time

- **Weekly:** run on one or more days of the week, at a specified time. Note: You may select more than one day from this drop-down list. Use this option to run jobs on weekdays only (e.g. run on Mon, Tue, Wed, Thu and Fri but exclude Sat and Sun).
- **Monthly:** run once per month at a specified day and time

Note: If your local time is different than the time on the hosted server, then the server time is displayed in parentheses to the right of the time field.

13. 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, 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, to notifications applied from the Employee properties window or to Time Lockout exception requests.

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. New 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 `
` to add a line break, can be used to format the message.

4. The following options are not available for all e-mail notifications:

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 new notification jobs of the same type. That is, if you are modifying a 'Time Awaiting Approval' notification, then all new '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.

Billing

Billing functionality in Dovico Planning & Timesheet permits invoices to be created based on fixed costs or on actual time and expenses entered by employees.

Functionality includes the 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 different software to create invoices, an optional **QuickLink App** is available from Dovico Apps (<http://www.dovico.com/apps.aspx>) to send time and expenses to QuickBooks. For other applications, our **Import/Export App**, also available from Dovico Apps, is able to export time and expense entries from the Dovico database in .csv format.

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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 flagged as billable or by fixed cost.

- When you create invoices for projects that are billed according to **actual hours**, the invoice is 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 is prepared based on the fixed amount entered in the project's properties window.

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 prepare 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 53) is set to **Actual Hours** (or **Estimated Hours**).

Notes:

- Whether the **Billing by status** is set to **Actual** or **Estimated** hours, the invoice created is based on actual hours.
- If currencies functionality is enabled, the project will be billed using the currency designated for the project (page 53).

1. Select **Billing** from the menu (Menu > Views tab > Billing).
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'. If not, review the 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 billable 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 uncheck all items within the Billable Time tab.

	Payments	Fixed Costs	Billable Time	Billable Expenses	Custom Fields	
<input checked="" type="checkbox"/>	Date	Name	Task	Rate	Duration	Cost
<input checked="" type="checkbox"/>	4/1/2014	White, Estelle	Assessment	USD \$250.00	2.50	USD \$625.00
<input checked="" type="checkbox"/>	4/2/2014	Allen, Nathan	Assessment	USD \$250.00	4.00	USD \$1,000.00
<input checked="" type="checkbox"/>	4/3/2014	White, Estelle	Assessment	USD \$250.00	6.50	USD \$1,625.00
<input checked="" type="checkbox"/>	4/3/2014	Richards, Terry	Assessment	USD \$0.00	7.00	USD \$0.00
<input checked="" type="checkbox"/>	4/4/2014	Richards, Terry	Concept Plans	USD \$0.00	6.00	USD \$0.00
<input checked="" type="checkbox"/>	4/7/2014	Allen, Nathan	Assessment	USD \$0.00	4.00	USD \$0.00

- Click the **Update Owing** button to preview the amount to be invoiced (Amount owing).
- 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.


- (Optional) Click the **Description** button to enter details about 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**.
- Click **Post** to post the invoice.
- 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 are 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 53) is set to **Fixed Cost**.
- Select **Billing** from the menu (Menu > Views tab > Billing).
 - Click the **New** button  on the top toolbar.
 - 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 project's Billing by status.

 * Project:	ACME-Support	▼	The Project is billed by Fixed Cost
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- Select the invoice **date**.
- (Optional) Enter an invoice **number**.
- (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**.
- Click the **Update Owing** button to review the Fixed Cost amount to be invoiced.
- Click the **Fixed Costs** tab to review, select or un-select the fixed costs entries to include in this invoice.

9. 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.

10. Click **Post** to post the invoice.
11. Click the **Print** button to view and print the invoice.

To add a payment to an invoice:

1. Select the **invoice** from the list.
2. From the **Payments tab**, click the **New** button  at the bottom of the screen.
3. Select the payment **date**.
4. Enter the **amount** paid.
5. If enabled, select the **currency** for the amount.
6. Enter the check or other reference number in the **Check Number** box.
7. Click **OK**.
8. 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 202). You may need to click the **paging** buttons (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 **Approved Expenses** views.
- Use the **Show/Hide column**  function to personalize what information is displayed in the Billing view's grid.
- 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**.


To add a region:

1. Select **Regions** from the menu (Menu > Views tab > Regions).
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). Example; enter 7.5 for a 7.5% tax rate. This tax is only applied to billable time entries when an invoice is created using the Billing view.
5. Enter a **Tax on Expenses rate** (as a percentage). This tax is only applied to billable expenses when an invoice is created using the Billing view.
6. Click **Save** .

OPTIONAL INSTRUCTIONS:

7. Enter a **description** (up to 250 characters).
8. 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.
9. Click **Save** .

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**.

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 Planning & 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 301).
For information on entering **budgeted expenses**, go to page 162.

In Expenses ...

Approved Expenses	page 186
Expense Categories	page 190


See page 88 for information on setting approval workflows for expenses.



Approved Expenses

The **Approved Expenses** view lists all approved expenses that exist in the database. The view can be used to:

- Review approved expenses by employee, project or date
- Edit expense entries
- Flag expenses as reimbursed (paid)
- Reject expense sheets
- Review expense attachments
- Add expenses to an existing expense sheet
- Review expense amounts in any currency (if enabled)

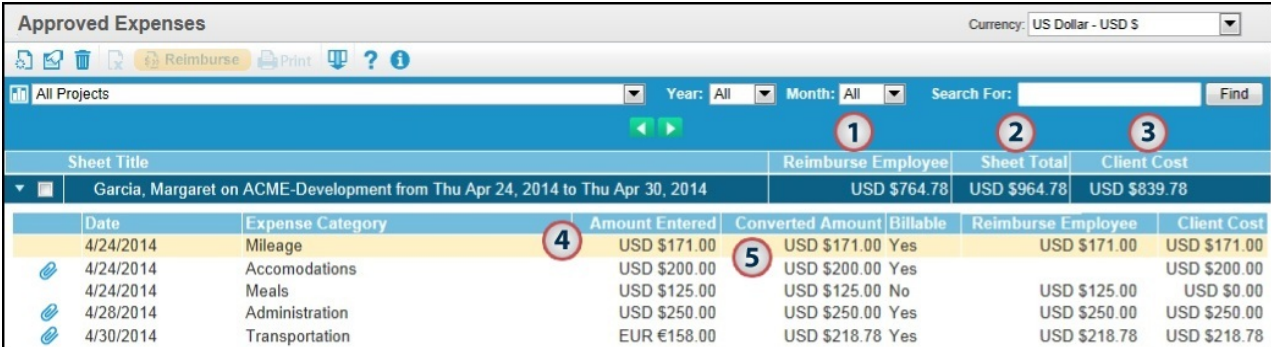
The **Approved Expenses view** is located in Menu > Views tab > Approved Expenses.

The expense sheets are displayed in the right side pane. By default, all expense sheets are 'collapsed' and clicking the arrow icon  next to the sheet title expands the sheet to reveal the individual expenses within the sheet. Expense sheets are sorted by Start date with the oldest date at the bottom (reverse chronological).

You can review an expense's attachment by clicking the attachment icon  at the far left side. Selecting an individual expense item and clicking the Properties toolbar button  permits details to be modified.

The **Currency** options described below are only available if Currencies have been enabled (page 151).

- 1 Reimburse Employee:** The Employee reimbursable total - in the Currency the employee is paid.
- 2 Sheet Total:** The entire sheet's total - in the currency selected in the Currency drop-down.
- 3 Client Cost:** The Billable Client Cost - in the currency selected in the Currency drop-down.
- 4 Amount Entered:** The expense amount entered by the employee - in the Currency specified by the Employee.
- 5 Converted Amount:** The expense entry's amount converted to the currency selected in the Currency drop-down.




Sheet Title		1 Reimburse Employee	2 Sheet Total	3 Client Cost		
Garcia, Margaret on ACME-Development from Thu Apr 24, 2014 to Thu Apr 30, 2014		USD \$764.78	USD \$964.78	USD \$839.78		
Date	Expense Category	4 Amount Entered	5 Converted Amount	Billable	Reimburse Employee	Client Cost
4/24/2014	Mileage	USD \$171.00	USD \$171.00	Yes	USD \$171.00	USD \$171.00
4/24/2014	Accommodations	USD \$200.00	USD \$200.00	Yes		USD \$200.00
4/24/2014	Meals	USD \$125.00	USD \$125.00	No	USD \$125.00	USD \$0.00
4/28/2014	Administration	USD \$250.00	USD \$250.00	Yes	USD \$250.00	USD \$250.00
4/30/2014	Transportation	EUR €158.00	USD \$218.78	Yes	USD \$218.78	USD \$218.78

If enabled, the upper right corner of the screen has a Currency drop-down list which permits calculated costs to be reviewed in any enabled currency. The 'Display by Project Currency' option displays costs in the currency associated to the project.



Note: Expense sheets not submitted or submitted but not yet approved are not displayed in the Approved Expenses view.

To locate expenses:

The Approved Expenses view contains several filtering and sorting options to help locate a specific expense sheet or expense entry.

- When Approved Expenses  is selected in the tree control on the left, the **Project**, **Employee** and **Date** filters are available at the top of the view. Use one or more of these to further narrow the list of expense sheets displayed. Also available is the **Sort by Employee** checkbox.




- The **Search For** box (at the far right) checks matching data in the following columns: Date, project name, employee name, expense category name, description, check number, reference number, purchase order number and sheet title. Do not enter wildcards as these are automatically used.
- Using the tree control in the left side pane, all expenses can be sorted by their 'reimbursement' status:
 - Clicking on **To be reimbursed**  displays all expense sheets that have not been flagged as 'reimbursed' and that contain at least one reimbursable expense. Expanding the tree displays all employees with expense sheets in this category.
 - Clicking on **Reimbursed**  displays all expense sheets that have been flagged as reimbursed. Any submitted expense sheet that contains no reimbursable entries is automatically categorized as Reimbursed. Expanding the tree displays all employees with expense sheets in this category.

Notes:

- The Expense Sheet name convention is as follows; 'Last Name, First Name' 'Sheet title as entered by employee' on 'Client Abbreviation - Project Name' from 'Start Date' to 'Finish Date'.
- The number of expense sheets displayed is limited by the **Paging** setting (page 202). You may need to click the **paging** buttons (at the top of the page) to view other record pages.

To edit an expense entry:

1. Locate and click on the expense entry to edit.
2. Click on the **Properties** button  on the toolbar. You can also double click the item or right click and select Properties.


The expense entry's properties pop-up window opens.

3. Edit any of the fields as required. Information on the available fields is detailed in the 'Add expense entry' instructions that follow.
4. Click **Done**.

Note: The project and employee associated with the expense entry cannot be modified.

To flag an expense sheet as reimbursed:

The 'To be reimbursed' and 'Reimbursed' status categories are for sorting and reporting purposes only. These do not affect whether or not expenses are displayed in other views and tools.

1. Click on **To be reimbursed** in the tree control on the left.
2. Check one or more **sheets** to be marked as reimbursed.
3. Click the **Reimburse Expense** button  on the toolbar.

In the pop-up window:


4. Select a **date**.
5. **(Optional)** Enter a **Check** or reference number. Note that this number is displayed to the employee who submitted the expense sheet.
6. Click **OK**.

The sheet is moved to the 'Reimbursed' section of the tree control.



Tip: Placing your mouse over an expense sheet's name will reveal information (as rollover text) about the sheet's reimbursement status.

To reject an expense sheet:


Only whole expense sheets can be rejected. Individual expenses cannot be rejected. Please enter enough details in the Reason box so that the employee can identify and correct the proper expense item(s).

1. Check the expense sheet to reject and click the **Reject** button  on the toolbar.
2. Enter the **reason for rejection**. This reason is displayed to the employee who submitted the expense.
3. Click **OK**.

To add an expense entry to an existing sheet:

1. Locate and expand the expense sheet to which the new expense will be added.
2. Click the **New** button  on the toolbar.
3. Select a **date** using the calendar button .




Note: The project and employee associated with the expense entry cannot be modified.

4. **(Optional)** Select an **expense category**.
5. **(Optional)** Enter a **purchase order** number.
6. **(Optional)** Enter a **reference number**.
7. 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 4 has been set up as a rate-based expense category. Edit the **cost per unit** value if required.
8. **(Optional)** Attach a **file**  to the expense entry.
9. If applicable, check the **Request reimbursement** option.
10. Check the **Billable** box if this expense is billable.
 - a. If billable, optionally enter a **markup** as a percentage.
 - b. If billable, optionally enter a **fixed** amount.
11. **(Optional)** Enter any applicable tax amounts in the **Value Added Tax** fields.
12. **(Optional)** Enter a **description** for the expense. This description is displayed on the Invoice used for billing.
13. Click **Done**.

Notes:

- Expenses entered in the Approved 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 the **Billable** box is checked, the expense entry is available for invoicing using the Billing view.

Tips:


- Use the **Show/Hide column**  function to personalize what information is displayed in the Approved Expenses view's grid.
- You can add fields to track extra expense information by using **Custom fields**.
- You can review expense sheet details in a report by using the report button on the toolbar  **Print** .
- Many of the toolbar functions described are also available by using your mouse's right click button.

Expense Categories

Expense Categories are used 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. Mileage, 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 Approved Expenses views, and are displayed to employees entering expenses from the Expense entry screen.

To add an expense category:

1. Select **Expense Category** from the menu (Menu > Setup tab > Expense Category).
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
 - c. If enabled, select the **currency** for the Cost per Unit amount. The currency selection is used to calculate the total for the employee's reimbursement amount.

Ignore the **More** button if you are creating a new Expense Category. The More button (page 191) is used when editing an existing Expense Category and you want to backdate existing expenses that used this Expense Category.

- d. 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 is 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 212)

OPTIONAL INSTRUCTIONS:

5. Enter a **description** for the expense category (up to 250 characters).
6. 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 202). You may need to click the **paging** buttons (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.
- **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 190), several options are available via the **More** button, which determine what changes, if any, are applied to existing expense entries associated with the Expense Category. These same options are available if modifying an expense category's Currency setting.

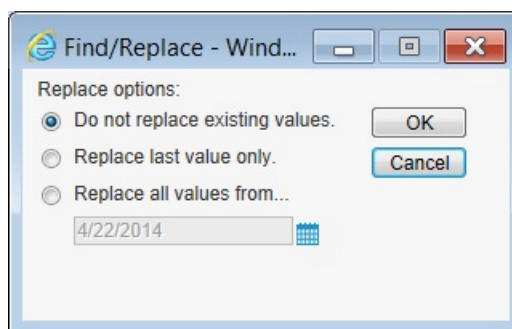
How edited Cost per Unit values affect future expense entries:

When a Cost per Unit value or Currency selection 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 changes to APPROVED expense entries:

When an expense category's Cost per Unit value or Currency selection is changed, a 'More' button appears next to the field. Clicking the More button offers 3 options, which determine what changes, if any, are made to **approved expense entries** - associated with the Expense Category. As noted above, 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 replace the most recently used cost per unit value for this Expense Category in Approved Expenses with the new value. For example: if the cost per unit was changed from 10.00/unit to 11.00/unit, then all approved expenses in the database which used this 10.00/unit value will be changed to 11.00/unit. Any approved expenses using a different cost per unit value will remain unchanged.
- **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.



Time and Attendance

Time and Attendance functionality in the software allows a manager or administrator to create the policies that determine how much, and how fast, employees can accrue vacation, sick leave, and other types of 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 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	page 193
Accrual From Date	page 196
Adjust Accrual Rule	page 197

Leave/Absences Rules

The **Leave/Absences Rules** view allows a manager or administrator to apply the policies that determine how much, and how fast, employees can accrue vacation, sick leave, and other types of 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 that 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. Select **Leave/Absences Rules** from the menu (Menu > Setup tab > Leaves/Absences Rules).
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.

Hours: 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.

Days: 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 each employee's profile.

Month: 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.

Years: 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 hours after 5 hours worked nor accrue 0.75 hours 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 that will use this accrual rule.


Regular Time Only: The accrual will only occur when time entries are entered as regular time (not overtime).

Overtime Only: 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.

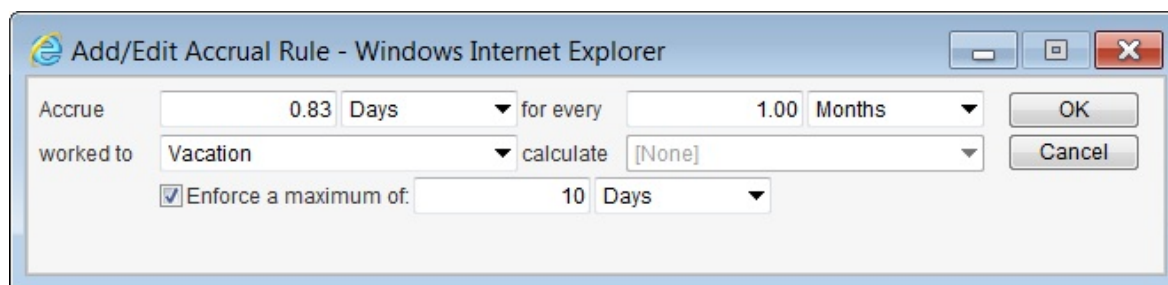
Both Regular Time and Flex time: The accrual will only occur when time entries are entered as regular time or flex time.

- **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.



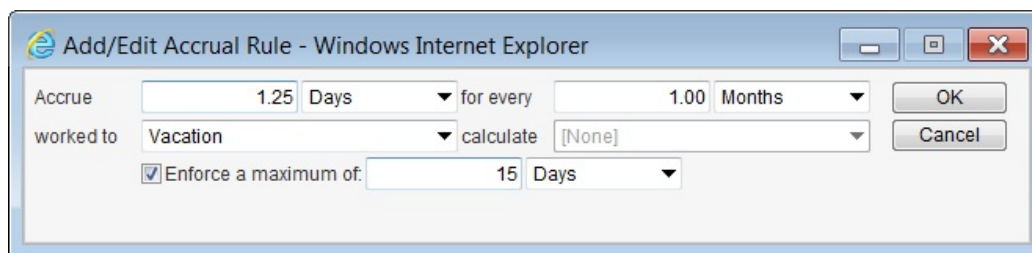
The screenshot shows a dialog box titled "Add/Edit Accrual Rule - Windows Internet Explorer". It contains the following fields and controls:

- Accrue**: 0.83 Days (dropdown)
- for every**: 1.00 Months (dropdown)
- worked to**: Vacation (dropdown)
- calculate**: [None] (dropdown)
- Enforce a maximum of**: 10 Days (dropdown)
- OK** and **Cancel** buttons.

Note: The number of leave/absences rules displayed in the view is limited by the **Paging** setting (page 202). You may need to click the **paging** buttons  or  (at the top of the screen) to view additional record pages.


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.



The screenshot shows the same dialog box as above, but with the following changes:

- Accrue**: 1.25 Days (dropdown)
- for every**: 1.00 Months (dropdown)
- worked to**: Vacation (dropdown)
- calculate**: [None] (dropdown)
- Enforce a maximum of**: 15 Days (dropdown)
- OK** and **Cancel** buttons.

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

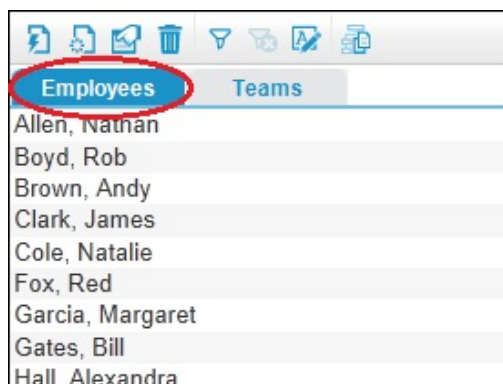
The **Accrue From date** is used to determine when the accrual calculation starts for a particular accrual rule. For example, if a rule starts on April 1, 2014, time recorded prior to this date will not be included in the calculation for available hours left (displayed in the Accrual Information box).


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.

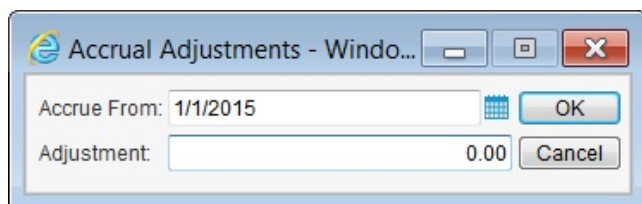
To change the start date for an accrual rule:

1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).

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.


Notes:

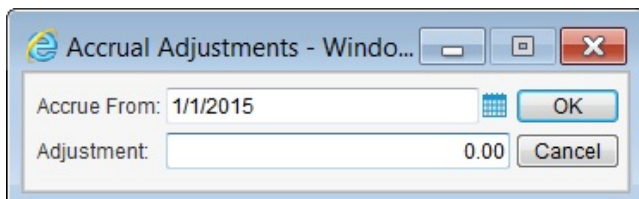
- Only 1 adjustment can be made per employee. If a second adjustment is required, then this adjustment should be the total of the previous and new adjustments. Example; Joe had a previous adjustment of 10 hours. His manager has granted him 5 additional hours so the new adjustment must be set to 15.
- When an adjustment is made, it does not change the rule for other employees.

To adjust an accrual rule:


1. Select **Project Assignments** from the menu (Menu > Views tab > Employees & Projects > Project Assignments).

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. **Note:** If a maximum number of hours has been established in the Leave/Absence accrual rule's properties, then any hours added using this Adjustment field will contribute towards reaching the maximum number of hours.
7. Click **OK** to close the Accrual Adjustments window.
8. Click **Done**.



Accrual Adjustments - Windo...

Accrue From: 1/1/2015  OK

Adjustment: 0.00 Cancel

Customizing and Options

Dovico Planning & 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	page 199
Options	page 202
Timesheet Options	page 204
Database Options	page 207

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. Custom data fields can be added to projects, tasks, etc., and can be numeric, alphanumeric, dates and can be multiple choice.

Employees entering time or expenses can also 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, overtime rates, invoices (billable), expenses, budgeted expenses, expense categories and time entries.


The following describes how to (1) create a custom field, and (2) how to limit the availability of some custom fields.

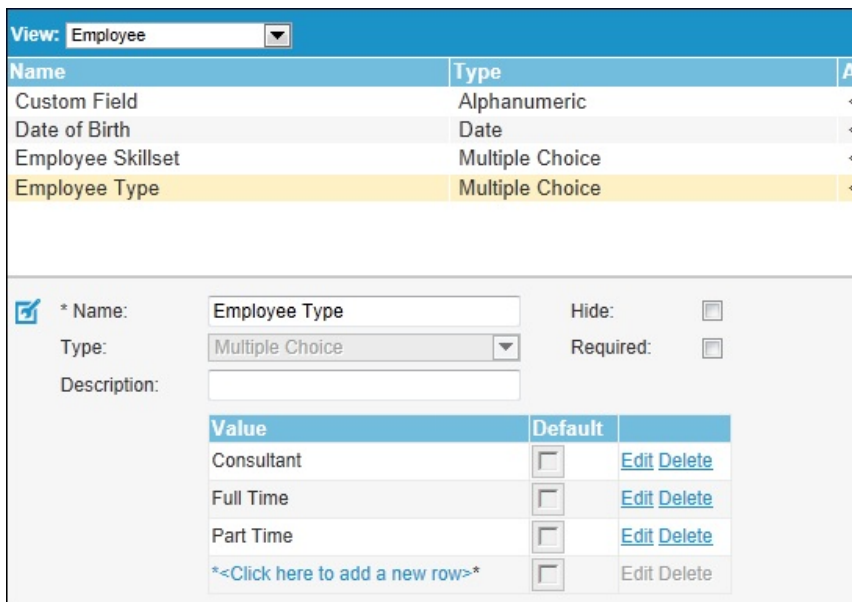
To create a custom field:

1. Select **Custom Field Templates** from the menu (Menu > Setup tab > Custom Field Templates).
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 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 that identifies the custom field in the targeted view (step 2).
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.



The screenshot shows the 'Custom Field Templates' interface. At the top, there is a 'View:' dropdown menu set to 'Employee'. Below this is a table listing existing custom fields:

Name	Type	At
Custom Field	Alphanumeric	<
Date of Birth	Date	<
Employee Skillset	Multiple Choice	<
Employee Type	Multiple Choice	<

Below the table is a form for creating a new custom field. It includes a checked 'New' button, a text input for '* Name:' (containing 'Employee Type'), a 'Type:' dropdown (set to 'Multiple Choice'), and checkboxes for 'Hide:' and 'Required:'. A 'Description:' text input is also present. At the bottom, there is a table for defining the values for the 'Multiple Choice' type:

Value	Default	
Consultant	<input type="checkbox"/>	Edit Delete
Full Time	<input type="checkbox"/>	Edit Delete
Part Time	<input type="checkbox"/>	Edit Delete
<Click here to add a new row>	<input type="checkbox"/>	Edit Delete

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 that 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.

Value	Default	
Consultant	<input type="checkbox"/>	Edit Delete
Full Time	<input type="checkbox"/>	Edit Delete
Part Time	<input type="checkbox"/>	Edit Delete
<Click here to add a new row>	<input type="checkbox"/>	Edit Delete


- 8a. Click on the '**Click here to add a new row**' text.
- 8b. Enter **data** in the Value field.

Value	Default	
Consultant	<input type="checkbox"/>	Edit Delete
Full Time	<input type="checkbox"/>	Edit Delete
Part Time	<input type="checkbox"/>	Edit Delete
<input type="text"/>	<input type="checkbox"/>	Cancel Save

- 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.


Notes:

- If both Required and Hide are selected, the Hide overrides Required.
- The Required option does not work for projects and tasks created using the Project Planning tool.

11. Click **Save** .
12. Repeat steps 3 to 11 as required.

Notes:

- When a new custom field is created, any default value assigned to the custom field is only applied to items created after the custom field is applied. For example, if you create a custom field for Tasks with a default value of 10, that custom field and value will only be applied to newly created tasks. Existing Tasks are not affected.
- Reporting on Custom fields is accomplished through Reports.

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 Expenses or Time Entry are selected from the View drop-down list, the **Additional** tab allows you to create custom fields that 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** 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 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. By default, when a new custom field is created, all Tasks (or Expense Categories) are moved to the 'Tasks assigned to' list box meaning that the new custom field will be applied to all Tasks. Use arrow buttons located between the list boxes to move items from one list box to the other.
5. Click **Save** .

The following image 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 a time entry, the Defect number field is only available when Bug fix is selected as the task.

View: Time Entry			
Name	Description	Type	Applies To
Defect Number	Defect Tracking number	Numeric	<Specific Items>

Available Tasks: Assessment Bank Holiday Code Concept Plans Data Analysis and Reporting Data Entry Design E-Mail Graphic Design Implementation	> >> < <<	Tasks assigned to: Bug Fix
---	--------------------	--------------------------------------

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, (2) how to change settings for Paging, and (3) how to modify the text that appears in the e-mails sent to alternate approving managers.

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 to a project. For further control over project assignments, 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 unchecked: If you do not want to assign associated tasks when assigning task groups to projects.

1. Select **Options** from the menu (Menu > Setup tab > Options).
2. **Check** (or **uncheck**) the 'Assign Tasks when assigning Task groups' box.
3. Click **Apply**.

Note: When a task is added to an existing task group, the option to update assignments is made available to the user.

Paging:

By default, the software displays 100 records (items) per page in certain 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. Modifications to this option do not alter the settings for other users.

Use this option as follows:

1. Select **Options** from the menu (Menu > Setup tab > Options).
2. Check the Specify items per page box and enter a **number of items** per page (minimum of 1).
or
uncheck the Specify items per page box to remove all limits.
3. Click **Apply**.

Note: Paging is not used on all views.

Alternate Manager notifications

You can modify the text used in the e-mail notifications sent to alternate approving managers.

Use this option as follows:

1. Select which e-mail notification type 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. New tags cannot be added, but existing tags can be removed.

3. Click the **Preview** button to see the applied changes.

Notes:

- Employee names 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 `
` 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 check-boxes.
 - **Make this the default text for 'same type' notifications:** Use this option to apply the text changes to all new notification jobs of the same type. That is, if you are modifying an 'Out of Office' notification, then all additional 'Out of office' notification jobs will use this as the template. Existing notification jobs are not modified.
 - **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.

Timesheet Options

The **Timesheet Options** view permits 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 that 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. Select **Timesheet Options** from the menu (Menu > Setup tab > Timesheet Options).
2. Click the **Timesheet** tab at the top of the screen.
3. Select the **employee** whose 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, review or modify.
5. Click **Apply**.

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 in a cell within the time entry grid.

- **Start/End times:** Show/hide the Start and End times in the details area.
- **Time Format:** Set the time entry format for the Start and End time fields in the details area. This option is only available if the Show Start/End times option (above) is 'on'.
 - **Default** uses the server's regional setting.
 - **12 Hour AM/PM** option (1:30 PM) Note that the 'AM/PM' terminology does not change with regional settings.
 - **24 Hour** option (military time, e.g. 13:30).
- **Regional setting:** Select the regional setting for date, number and currency formats. This option is only available if Currencies have been enabled. If not enabled, the regional setting for all users is based on a configuration setting in Database Options. Users may need to logout and log back in to see the regional setting changes applied throughout the software.
- **Paper size:** Sets the default paper size for reporting.
- **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. The task description is used as the default entry for the 'Time Entry Description' field in the time entry tool, and can be modified by the employee.
- **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.
- **Show Approval Paths:** Show/hide the Show Approval Paths button in both the Time and Expense Entry toolbars. When hidden, the approving manager's name is also hidden from the Sheet Status column in the expense entry tool's Submitted/Approved tab.

- **Start of week:** Select the default day of the week that starts each week. Employees are able to modify their Start of the week option regardless of the selection made in this view.

11/13/2014 - ACME - Development - Design

Track Your Time

* Start: 08:00 AM * End: 09:45 AM * Duration: 1.75

Project Description: ACME Development Project

Task Description: Description entered for this task (by manager)

Time Entry Description: Description as entered by the employee

Billing

Overtime Rate: [None]

Are you billing a Client for this time? (Billable):

Client Overtime Rate: [None]

Task Progress

Start: Monday, November 10, 2014

Finish: Friday, November 21, 2014

Budget - Actual: 55.00 - 11.00 = 44.00

Estimate To Complete (ETC): 40.00

Notes:

- Use **Always shown** to always display the item in the time entry screen.
- Use **Always hidden** to never display the item in the time entry screen.
- Use **User configurable** to permit the employee to determine whether or not to show the item in the time entry screen.
- **Mixed** is displayed when no employees are selected or when multiple employees are selected and these do not have the same Shown/Hidden setting for the option.
- The time entry screen has a similar view (**Options** tab) 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. Select **Timesheet Options** from the menu (Menu > Setup tab > Timesheet Options).
2. Click the **Expense tab** at the top of the screen.
3. Select the **employee** whose 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 or other tracking number.
 - **Purchase Order**: Used to enter a purchase order or other tracking number.
 - **Reimburse**: Used to select if 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:
 - 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 to determine whether or not to show the data entry field in the expense entry screen.
 - Mixed** is displayed when no employees or columns are selected or when multiple employees/columns are selected and these do not have the same Shown/Hidden setting for the option.

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.

Database 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. Select Database Options from the menu (Menu > Setup tab > Database Options).
2. Set or edit any of the following options:

From the **General Tab**

- Automatically create projects for each new client (page 208)
- Include client short name in project name (page 208)
- New tasks default to global (page 208)
- Time & Expense Approval view preference (page 209)
- Audit trail settings (page 209)
- New project defaults (page 210)
- Regional settings (page 210)
- Report setting (page 210)
- Locked Users settings (page 211)
- Password Settings (page 211)

From the **Notifications Tabs**

- Default SMTP settings (page 212)
- Instant E-mail Notification defaults (page 212)

From the **Database Terminology** and **Other Terms Tabs**

- Set or edit terminology used throughout the software (page 212)

From the **Company Profile Tab**

- Enter or edit company information used in reports (page 213)
- Add a logo to your reports (page 135)

From the **API Tab**

- Configure API access for 3rd party applications (page 213)

Note: You can also set personal preferences using Options (page 202).

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 unchecked: (Default setting) With this option unchecked, projects must be created manually and assigned to a client.

Box checked: The software 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.

To set your preference:

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
2. Select the **General** tab.
3. In the Assignment Options area, check (or uncheck) 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: (Default setting) The software 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 full client name is displayed in the time entry and Project Assignments views.

Box unchecked: To exclude the client abbreviation from the project name in views and drop-down lists (Project Assignments view excluded).

To set your preference:

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
2. Select the **General** tab.
3. In the Assignment Options area, check (or uncheck) the box labeled '**Include Client short name in Project name**'.
4. Click **Apply**.

New tasks default to Global

Use this option as follows:

Box unchecked: (Default setting) To set tasks as Non Global whenever a new task is created.

Box checked: To set tasks as Global whenever a new task is created. This option is useful for companies that don't make specific assignments of projects and tasks to employees (i.e. assign all tasks to all employees). If a project has no assignments made manually through the Project Assignments view or Quick Assign, then global tasks are assigned to the project and all employees are assigned to the global tasks.

Note: This option does not apply to tasks created in the Project Planning tool.

To set your preference:

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
2. Select the **General** tab.
3. In the Assignment Options area, check (or uncheck) 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 that have already been approved or are under review.

To set your preference:

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
2. Select the **General** tab.
3. In the Time & Expense Approval view area, check or uncheck the '**Show all entries within selected sheet's date range**' box.
4. Click **Apply**.

Audit Trail settings

Dovico'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 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 database and can be extracted or backed up using **Backup Audit Trail** (page 255).

To use the Audit Trail function:

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
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, team, task group, project group, expense category, workflow rule, leave/absences rule, security group, project approval workflow, automated job, custom field template, vacation (time off), skillsets, baselines, as well as rate changes in the Employees view, overtime rate changes in the Overtime Rates view, prorating changes in the Tasks view. Records all changes to Currencies and Exchange Rates. Records the use of the Bulk Time Move utility and information related to Time Lockout exception requests. Logging and logout events.
 - **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).

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: When a new project is created, this option will set all new time entries (and/or expenses) associated with the project as **billable** by default. That is, for employees entering time or expenses, the Billable checkbox will be set as checked.

Box unchecked: When a new project is created, this option will set all new time entries (and/or expenses) associated with the project as **non billable** by default.

To set your preference:

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
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.

Regional Setting

Use this option to set the default regional setting for all users.

Note: If currencies have been enabled, users can specify their personal regional setting using the Options tab (page 294), or user regional settings can be set or forced by an administrator using Timesheet Options (page 204).

To set the default regional setting:

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
2. Select the **General** tab.
3. Expand the Regional drop-down list and **select a region**.
4. Click **Apply**.

Users may need to logout and log back in to see the regional setting changes applied throughout the software.

Report Setting

Use this option to set the default paper size for all users.

To set the default regional setting:

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
2. Select the **General** tab.
3. Expand the Default Paper drop-down list and **select a size**.
4. Click **Apply**.

Locked Users Settings

By default, the software tracks failed login attempts by User ID and locks out a user when the number of consecutive failed login attempts reaches 5 within a span of 30 minutes. The user is automatically unlocked after 30 minutes but can be reset sooner by an administrator using the Locked Users tab in the Security section of the software (page 254).

Use this option to modify account lockout settings, or to disable it completely.

How to modify login attempt parameters:

Box checked: Lockout settings enabled to all users

Box unchecked: Lockout settings disabled to all users

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
2. Select the **General tab**.
3. In the Locked Users Settings area:
 - **Invalid Login Attempts** - Number of attempts before a user is locked out.
 - **Lockout Duration (Minutes)** - Lockout duration.
4. Click **Apply**.

Password Settings

These options permit an administrator to manage password security settings.

Note: Users linked to Active Directory are exempt from these requirements unless a similar option has been enabled within Active Directory.

Enforce Strong Password:

A strong password is required for each user when the 'Enforce Strong Password' option is checked.

A strong password must:

- contain at least 8 characters
- contain at least 3 of the following character types - uppercase letter, lowercase letter, number or special character
- cannot contain the user's User Name

1. Check the **Enforce Strong Password** box.
2. Click **Apply**.

When the box is checked for the first time, only future passwords will need to meet the strong password requirements.

Enforce Forced Password Reset:

This option forces all users to change their login passwords after a set (and recurring) period of time.

1. Check the **Enforce Forced Password Reset** box.

- Reset Frequency (Days): This option sets the interval (in days) between forced password reset (example 120 days).
 - Minimum Password Age (Days): After a user changes his or her password, this number represents the number of days he or she must wait until they can change their password again.
2. Click **Apply**.

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.

Select **Database Options** from the menu (Menu > Setup tab > Database Options).

To setup the e-mail notification information:

DO NOT EDIT. These are automatically setup for you if you are using **Dovico's Hosted solution**. Contact Dovico Support to troubleshoot any problems.

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 67) 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 unchecked: For all new employees created, the checkbox will be set as unchecked.

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
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 the software 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 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'

Changes will appear in menu items, column headings and reports.

To customize terminology:

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
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'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. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
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. **(Optional)** Add a **logo** to appear on all reports (page 135).
10. Click **Apply**.

API Settings

The Dovico Cloud API allows customers and 3rd party developers to expand and build on the Dovico Cloud platform.

The Dovico Cloud API is a REST API for accessing Dovico Cloud Services account data using HTTP and XML. The API allows you to easily extend the Dovico Cloud Services to integrate with on-premise applications, other cloud services, third party applications powered by Dovico Cloud services, among other services.

Application ideas:

- Integrate with third party billing services.
- Develop a mobile platform dashboard application for project KPIs.
- Integrate with on-premise accounting software.
- Custom import tools (QuickBooks, Sage, CSV etc.)
- Desktop time entry widget.

This topic describes how to enable the API.

Full documentation on using the API is located at http://www.dovico.com/developer/API_doc/index.htm

Warnings:

- By enabling the API, you may no longer be adhering to regulatory standards and quality control guidelines followed by your company such as DCAA, CMMI, etc. This is primarily because tools developed using the API can enable users to bypass company processes for collecting timesheet data.
- The Data access token generated from this tab provides full access to all the database data and should only be given out where such access is warranted.

Note: When the API is enabled, an additional User Access token box is displayed in each user's Options tab (Menu > My Time & Expense > Options). This token provides a user with access to his or her own data only, and is required when an application such as a time entry gadget is created.

Enabling/Disabling the API:

1. Select **Database Options** from the menu (Menu > Setup tab > Database Options).
2. Select the **API** tab.
3. To enable, check the **Enable API** box.
The **Consumer Secret token** is required for API authentication. It is used to identify your company when using the API.
The **Data access token** is a special data access token that provides full access to all data in the application.
4. Using the Reset button will generate a new token and de-authorize the previous token. The previous token will no longer provide access to the API.
5. Check the **Allow Employees to use 3rd Party apps** box to enable each end user to generate their own data access tokens.
6. 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 [143](#).

To apply widespread changes to project actuals, see Actual Wizard on page [149](#).

See page [85](#) to learn how to create a large number of assignments more efficiently (Quick Assign).

In Bulk Tools ...

Holiday Time Entry page [216](#)

Bulk Time Move. page [217](#)

Update Employee Properties page [219](#)

Job Scheduler page [220](#)

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. Select **Holiday Time Entry** from the menu (Menu > Views tab > Holiday Time Entry).

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:

- The new time entry will not be added to specific employees if there are overlapping start and end times with existing time entries.
- The attempt to add time entries, associated to employees that fall within the lock out period, is not permitted and the operation will be cancelled.
- Tasks created in the Project Planning tool are not available for Holiday 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 Project Planning tool projects or to Microsoft Project projects are not available as source or destination targets.
- The attempt to move time entries that are locked down is only permitted for users with the appropriate Security option enabled (Time Lockout - Bulk Edit Override, page 224). Otherwise, only time that is 'unlocked' is moved. Time entries that are locked and moved are recorded in the Audit trail - if the Audit Trail is enabled.

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 the Budgeted Time & Costs view.
- When unapproved time is moved to a new task, the new task's rates/prorating is applied to the time. When approved time is moved to a different task, no rate/prorating changes are made.

The **Bulk Time Move** utility is located in Menu > Views tab > Bulk Time Move.

Selection parameters:

Source Projects: Lists all projects that 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 that 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.

Source		Destination	
Project:	[All] ▼	Project:	[None] ▼
Task:	[All] ▼	Task:	[None] ▼
Employee:	[All] ▼		

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.
7. **(Optional)** If available, check the **move time in lockout periods** box to move time entries that fall within a locked down date range.

The **Affected Records** displayed below the From calendar indicate the total number of time entries to be moved.

8. Click the **View Details** button to see a report detailing all the time entries selected. Save or Print the report as required.
9. 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.
6. **(Optional)** If available, check the **move time in lockout periods** box to move time entries that fall within a locked down date range.

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 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.
6. **(Optional)** If available, check the **move time in lockout periods** box to move time entries that fall within a locked down date range.

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.

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. Select **Update Employee Properties** from the menu (Menu > Setup tab > Update Employee Properties).
2. Select one or more **employees** from the list.
3. Perform any or all of the updates described below for the employees selected:
 - 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 67).
 - **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 an automation tool. It gives an administrator the ability to automate functions such as sending reports and e-mail notifications.

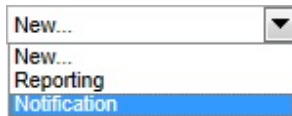
Automatic Notifications provides the ability to send out e-mail notices to employees and managers regarding time waiting approval, project alerts, incomplete timesheets, etc.

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, XLS, RTF, CSV, etc. formats.

The Job Scheduler view displays all currently created jobs, their job type, their next run time and description.

To create a scheduled job:

1. Select **Job Scheduler** from the menu (Menu > Setup tab > Job Scheduler).
2. Select the **type** of job from the drop-down list.



A new window opens displaying the various criteria required to schedule the job. The details required to schedule a job vary depending on the type of job selected:

Notification jobs

Time/Expenses Awaiting Approval (page [165](#))

Lockout Period (page [172](#))

Project Alerts (page [174](#))

Project Assignments (page [166](#))


Employee Incomplete Timesheet (page [168](#))

Manager Incomplete Timesheet (page [170](#))

Custom E-mail (page [177](#))

Reporting job (page [178](#))

To edit a scheduled job:

1. Click the job **row** to edit from the list.
2. Click the **Edit** button  **Edit** on the toolbar.
3. Edit information in any of the available tabs.
4. Click **Done** when all edits have been completed.

Security

Dovico Planning & Timesheet uses a permission-based security model allowing administrators to specify each user's access to views, tools and information within the software. Security is applied to each user when the user's profile is created. This flexible security system is capable of providing each user with only the information and tools required to perform his or her role within the company.

The software itself is divided into two main areas: (1) Time and Expense Entry and (2) the Administrative area. The Time and Expense Entry area is used by all employees to enter their individual time and expenses. In this area, users can only see their own time and expense data. All other information, including cost, is hidden. The Administrative area is available to administrators, managers, empowered employees, etc., and is used to setup, manage and monitor activities within projects.

To restrict access once a user has logged in, the software uses 2 levels of security. The first level is **Security Groups**. It specifies what views and tools are available to each user. When users login, they only have access to the views and tools defined by their Security Group. The second level is **Limited Access**. Limited Access further enhances security by limiting what data/information is available to users when they are in the Administrative views and tools permitted by their Security Group.

Carefully review the following pages in the Security section of this guide to obtain a better understanding of the options and to identify the best approach for your company when applying security.

Summary

Security Groups control what **views** and **tools** each user can access. Each user must be assigned to a security group.

Limited Access controls what **data/information** is displayed to users when they access the views and tools allowed by the designated security group.

In Security ...

Functional Overview	page 222
Security Groups	page 223
Pre-defined Security Groups	page 225
Limited Access Overview	page 227
Configuration Options.	page 228
Manager-Level Configuration.	page 229
Hierarchy-based Configuration	page 235
Switch Configurations.	page 251
Details on views and tools affected by Limited Access	page 253
Locked Users	page 254
Backup Audit Trail	page 255

To apply security to one or more reports, see Report Security on page 135
Information relating to Time Lockout is found on page 106.

Functional Overview - Security

SECURITY GROUPS - Overview

Security Groups define what views and tools are available to users. One security group is applied to each user when the user's profile is created. There are 5 pre-defined security groups, which provide a good starting point when assigning security to each user. These are designed to emulate the more common usage types found in most companies. The ability to create custom security groups allows companies to fine-tune security for those users with unique requirements.

For example, users assigned to the pre-defined 'Time and Expense entry' security group have access to the time and expense entry tool but are denied access to any views and tools in the administrative side of the software. Users assigned to the pre-defined 'Manager' security group have access to time and expense tools plus certain views within the administrative side of the software allowing them to create and assign projects and tasks to other users.

The pre-defined security groups are:

- **Administrator:** Users assigned to this security group have access to all areas in the software.
- **Manager:** Users have access to projects, tasks, assignments, reports, budgets and other areas required to manage projects.
- **Team Lead:** Users have access to projects, tasks, assignments and other views not showing budget or cost information.
- **Time and Expense entry:** Users only have access to the time and expense entry tools and are only able to view their own entries. Information relating to time rates or time costs is not displayed. Access is also denied to all Administrative functions.
- **Auditor:** Users can only view and print reports in the Administrative area. All other views and tools are inaccessible.

Instructions on using Security Groups begin on page [223](#).

LIMITED ACCESS - Overview

Limited Access is a mechanism that works in combination with the Security Groups described above. Its primary goal is to limit data/information available to those users who have access to the Administrative areas of the software. Applying limited access filters the information a user can see to only those projects, tasks, etc., that the user has been specifically permitted to view.

An example using Projects:

Without limited access, a user assigned to the 'Manager' security group can view **ALL projects** and project details. By using limited access, it is possible to restrict that manager's access to only those specific projects selected by your administrator.

Limited access can be applied to Projects, Tasks, Task Groups, Employees and Teams.

Limited Access is important for those companies wanting to restrict information visibility between departments, business units, teams, etc. Limited Access is also very helpful in reducing the amount of information available to a manager. With limited access applied, managers do not have to search through hundreds of projects or tasks just to locate the ones that are relevant to them.

The built-in flexibility permits an organization to apply Limited Access in one of two operating modes:

- In **Manager-level mode** (default) you assign access permission for projects, tasks, etc., to a user by selecting the user **by name**.
- In **Hierarchy-based mode** you assign security by pools of users called '**Access Groups**' organized to replicate your company/department hierarchy, job descriptions or other.

Instructions on using Limited Access begin on page [227](#).

Security Groups

A **Security Group** defines what views and tools are available to a user. For each security group, every view and tool in the software is listed with the option to enable or disable access to that item.


Security groups are not applied to users via this view. This task is accomplished using each user's profile (see page 63). The Security Groups tab is used to view pre-defined (built-in) security groups and is used to create custom security groups when the existing ones do not perfectly match your requirements.

Notes:

- The software includes 5 pre-defined security groups, which cannot be modified or deleted. These security groups are Administrator, Manager, Team Lead, Auditor and Time & Expense Entry. See **Pre-defined Security Groups** (page 225) for a detailed description.
- A report detailing access settings for all security groups is available in the Reports view (Security Permissions).

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.

1. Select **Security** from the menu (Menu > Setup tab > Security).
2. Select the **Security Groups** tab.
3. Click the **New** button  on the toolbar.

A **security group properties** window opens.

4. Enter a unique security group **name** (up to 100 characters).
5. (**Optional**) Enter a brief **description** for the security group (up to 250 characters).
6. The **Views** list box displays all available administrative views for which Read, Modify and Delete can be modified. Select each view and assign permissions by choosing 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.

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.

Mixed is displayed as the status when more than one view is selected from the list and these do not have identical access settings.

7. The **Tools/Features** list box displays the tools and features, which can be enabled or disabled. Select each item and assign permission by choosing Yes or No in the **Access** drop-down list. Some items in the Tools/Features list are not readily identifiable with specific views. These are explained in 'Notes' on the next page.
8. (**Optional**) Show/hide company or client cost and employee 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:** Uncheck 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:** Uncheck 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 Cost Security settings do not hide rates from those views that are specifically designed to create and review rates. As a precaution, make sure that any security group with one or both of these boxes unchecked also has restricted access to the following: Billing view, Update Employee Properties view and the Security Group view.

9. **(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.
10. Click **Done** to save the information and close the window, or click **New** to save the information and create a new security group.
11. If the new security group has access to the **Reports** view, then assign the new security group to each report as required (see page 135). This is necessary because a new security group has no access to any report. However, if you are editing a copy of an existing security group then you should review each report's security.

Next step

The new security group is now created but still has to be assigned to one or more employees. This is accomplished via each user's profile (page 63) or by using the Update Employee Properties tool to make changes to multiple employees (page 219).

Notes:

- If an administrator changes a security group while an employee is using the software, then the new security changes will not take effect until the employee logs out of the software.
- The number of security groups displayed in the view is limited by the **Paging** setting (page 202). You may need to click the **paging** buttons  or  (at the top of the screen) to view additional record pages.

Notes about Tools/features list:

Most items displayed in the Tools/features list box are directly related to specific views and are self-explanatory. The following items are supporting features of specific views and require further explanation.

- **Limited Access Bulk Update:** This option allows the user to apply Limited Access security to items using the Limited Access tab in Security.
- **Time lockout Bulk Edit Override:** This option allows the user to modify items (time entries, rates, etc.) that are within a Lockout period. When applicable, the user is shown an option to update information in a lockout period.

Pre-Defined Security Groups

Each employee entered into the database must be assigned a security group giving that employee access to all or selected parts of Dovico Planning & Timesheet's software components.

The software has 5 pre-defined (built-in) security groups designed to meet typical user scenarios. These pre-defined security groups cannot be deleted or modified. If the 5 pre-defined security groups do not meet your needs, you can create new security groups and enable/disable access to fit your requirements.

The pre-defined security groups are:

- **Administrator:** Users assigned to this security group have access to all areas in the software.
- **Manager:** Users have access to projects, tasks, assignments, reports, budgets and other areas required to manage projects.
- **Team Lead:** Users have access to projects, tasks, assignments and other views that do not show budget or cost information.
- **Time and Expense entry:** Users only have access to the time and expense entry tools and are only able to view their own entries. Information relating to time rates or time costs is not displayed. Access is also denied to all Administrative functions.
- **Auditor:** Users can only view and print reports in the Administrative area. All other views and tools are inaccessible.

Note: The use of Limited Access (page 227) further enhances security by limiting what data/information is available to users when they are in the Administrative views and tools permitted by their security group.

The following table presents a simplified overview of 'access' to views and tools for each of the pre-defined security groups.

Security Group Access table - simplified

Views/Tools	Administrator	Manager	Team Lead	Time & Expense Entry	Auditor
Reports	√	√			√
Timesheet - Time Entry	√	√	√	√	
Timesheet - Expense Entry	√	√	√	√	
Time Calendar - monthly view	√	√	√		
Time Calendar - time entry details	√	√	√		
Time & Expense Approval	√	√	√		
Approval Override	√	√			
Workflows	√				
Alternate Approvals	√	√	√		
Time Lockout	√				
Time Lockout - Bulk Edit Override	√				
Actual Time & Costs	√				
Approved Expenses	√	√	√		
Assignments	√	√	√		
Budgeted Time & Costs	√	√			
Budgeted Expenses	√	√	√		
Items List - Clients	√	√			
Items List - Employees	√				
Items List - Projects	√	√	√		

Views/Tools	Administrator	Manager	Team Lead	Time & Expense Entry	Auditor
Items List - Task	√	√	√		
Items List - Task Groups	√	√	√		
Items List - Teams	√	√			
Quick Assign	√	√	√		
Project Groups	√	√	√		
Project Planning - Scheduling	√	√	√		
Project Planning - Vacation	√				
Project Planning - Skillsets	√	√	√		
Project Planning - Utilization	√	√	√		
Billing	√				
Overtime Rates	√				
Regions	√	√			
Integration - Microsoft Project	√	√			
Integration - Active Directory	√				
Integration - QuickBooks	√	√			
Integration - Import/Export	√				
Integration - Import Recovery	√				
Custom Field Templates	√	√			
Leave/Absences Rules	√				
Expense Categories	√	√			
Currencies	√				
Security - Groups	√				
Security - Limited Access	√				
Security - Reports	√				
Reports - Publish	√	√			
Time Lockout - Bulk Update	√				
Limited Access - Bulk Update	√				
Job Scheduler	√				
Update Employee Properties	√				
Holiday Time Entry	√	√	√		
Bulk Time Move	√				
Database Options	√				
Timesheet Options	√				
Backup Audit Trail	√				

Limited Access

OVERVIEW

What is Limited Access?

Limited access is a security mechanism permitting details about certain projects, employees, tasks, task groups and teams to be explicitly open to (or hidden from) VPs, project managers, team leaders and empowered employees who have access to the Administrative areas of the software. Applying limited access effectively filters the information a manager can access to only those projects, tasks, etc., that the manager is specifically permitted to view.

NOTE: Throughout the documentation describing Limited Access, the word 'manager' is frequently used as a generic term to describe all users who have access to the Administrative areas of the software. In this sense, manager is not meant to indicate a job description or position.

Do you require Limited Access?

Limited Access is important for those companies wanting to restrict information visibility between departments, business units, VPs, managers, etc. Limited Access is also very helpful in reducing the amount of information available to a manager. With limited access applied, managers do not have to hunt through hundreds of projects or tasks just to locate the ones that relate to them.

It is important to recall that the Security Group assigned to each user is the means used to completely restrict access to specific views and tools in the software. Using access to projects as an example, if you do not want a user to have access to any project information, then that is accomplished using the appropriate Security Group. Limited Access is important if you want a manager to have access to some projects - but not all. Limited access can be applied to projects, tasks, task groups, employees and teams.

With limited access applied, again using projects as an example, managers presented with a list of projects when running reports, when creating assignments, etc., only see the projects they are permitted to view. In contrast, Limited Access is not required if it is okay that managers having access to projects, tasks, task groups, employees and teams are able to see and report on all these items. There are some areas of the software where limited access to projects, tasks, etc., is not enforced or not fully enforced for secondary levels of information. These exceptions are described on page 250.

In the technical sense, limited access cannot be 'applied' or 'disabled'. Limited access is always 'on'. The true differentiation is whether you actively manage limited access or not.

- If you want all managers to have access to all items, then you do not need to configure and manage limited access. The software's default settings mean you only need to apply a Security Group to each user (page 223) and the remaining pages in this section can be disregarded.
- If you prefer to limit access to one or more projects, tasks, etc., then you must first determine which configuration best suites your situation, then prepare and roll out limited access. The remaining pages in this section detail these efforts.

Tip: The pages that follow first provide an overview of how each Limited Access configuration works and the benefits of each. This overview is followed by detailed instructions on setting up and using each option. Because both set of detailed instructions are similarly structured, these can seem repetitive or perhaps confusing. We suggest having the software on hand when reading the instructions.

In Limited Access ...

Which Configuration Option to select?	page 228
Using the Manager-Level Configuration	page 229
Using the Hierarchy-based Configuration	page 235
Switching Configurations	page 251
List of the views and tools affected by Limited Access	page 253

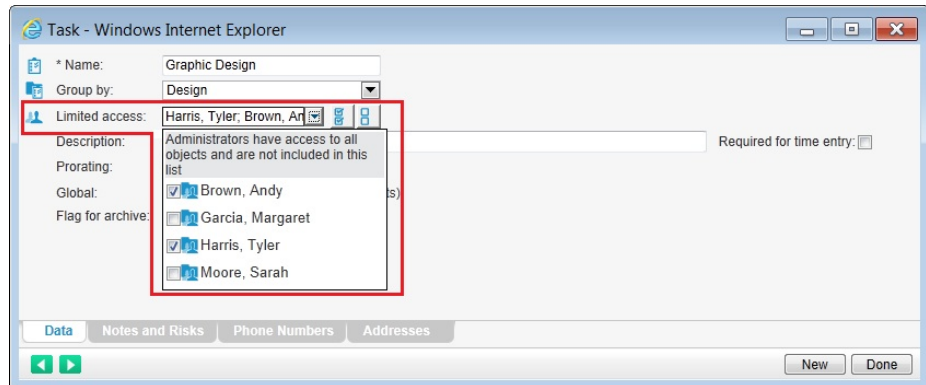
Which way to configure Limited Access?

The built-in flexibility permits a company to apply Limited Access in one of two operational modes: **Manager-level** or **Hierarchy-based**. Although it is possible to switch between operating modes, this is normally set once and then left alone.

Manager-level Limited Access

The default Limited Access configuration mode is **Manager-level**. Operating in manager-level mode means that when selecting who can view and report on a project, task, etc., you are presented with a list of **manager names** (see image). The effort required in this operating mode is to ensure that prompt and accurate permission is given to managers as new projects, tasks, etc., are added to the database.

The manager-level operating mode may be best suited for those companies that have a stable number of managers, small and stable set of projects and tasks, and infrequent staff turnaround at senior levels.



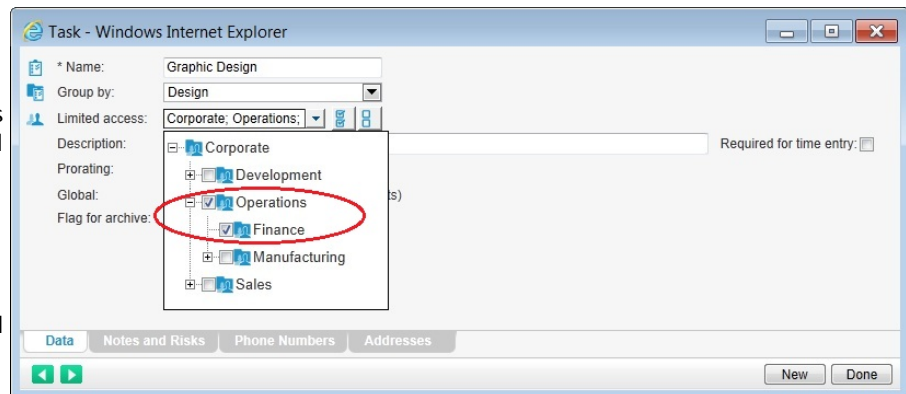
Applying limited access to a task in *manager-level* operating mode

Hierarchy-based Limited Access

Operating in **hierarchy-based mode** means that you assign access permission by pools of users called '**Access Groups**'. Access groups can be organized to model your company's departments, teams, etc. Creating access groups makes it easier to give, modify or deny permission to many users at once. Using this method, when a manager joins a department, business unit, team, etc., there is no need to manually assign access to all the different projects and tasks that the manager requires. You assign the new manager to an existing access group and then all items available to the access group are automatically available to the new manager.

The ability to create hierarchical (nested) access groups also means that permissions are automatically assigned to the members of the parent access groups. This means that a project assigned to a sub-level access group is automatically available to all parent access groups in the hierarchy branch.

Although requiring more initial planning, the hierarchy-based operating mode may be the preferred method for larger organizations.



Applying limited access to a task in *hierarchy-based* operating mode

- Configuring and using **Manager-level limited access** - page 229.
- Configuring and using **Hierarchy-based limited access** - page 235.

Limited Access - Manager-level mode

Limited access is a security mechanism capable of giving managers access to only certain projects, tasks, task groups, employees or teams while in the Administrative areas of the software. For example, you may want a manager to be able to view and report on some projects while excluding access to other projects. Limited access is required to apply this level of control.

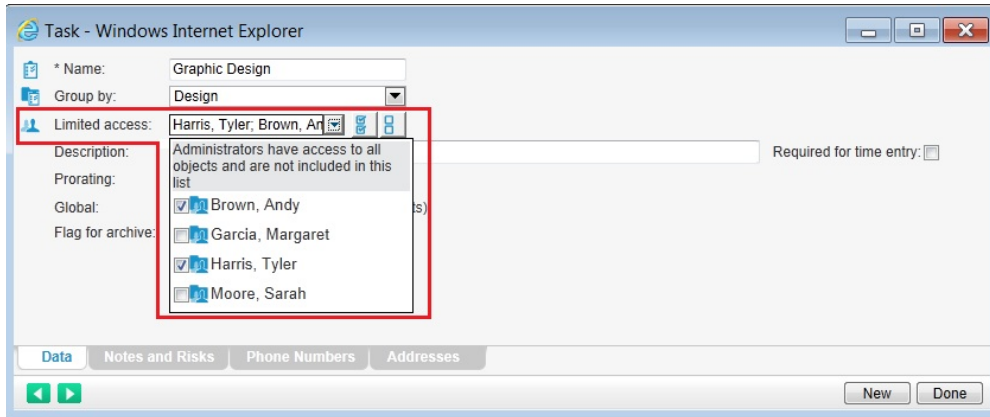
Manager-level mode is one of the 2 ways limited access can be configured. The other is Hierarchy-based mode. The differences between both modes were highlighted on page [228](#).

In Limited Access - Manager-level mode ...

Overview	page 230
Preparation.	page 231
Assigning Managers to items.	page 232
List of the views and tools affected by Limited Access	page 253

Overview - Manager-level limited access

In general, when adding or editing a project, task, task group, employee or team (via the item's properties window), there is a Limited Access field from which you are able to select which managers are able to access the particular item. Once selected, only the managers chosen are permitted to access, view and report on the item. A summary list of the views and tools modified by applying limited access is located at the end of this section (page 253).



Limited access applied to a task

TABLE: Simplified deployment of limited access applied to Tasks


	Manager 1	Manager 2	Manager 3
Task A	<input checked="" type="checkbox"/>		
Task B	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Task C	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Task D		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Task E	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Task F			<input checked="" type="checkbox"/>

As represented in the table above, Tasks A through F have each been limited to one or more managers. When Manager 1 accesses the Administrative areas of the software, only Tasks A, B, C, and E are available. The same access control can be applied to projects, task groups, employees and teams.

Preparation - Manager-level limited access

Prior to using Limited Access, there are 2 configuration items to check. You need to verify if Manager-level is the current limited access configuration - and switch if necessary. You also need to review the option to automatically assign limited access when new items are created.

Verify the current limited access operating mode:

1. Select **Security** from the menu (Menu > Setup tab > Security).
2. Select the **Limited Access** tab.
3. Expand the **Options** window at the very bottom by clicking on the expand  button.
 - If the label next to the first check box is 'Switch to **hierarchy-based** limited access mode', then you are currently in the Manager-level operating mode and no changes are required.
 - If the label shows 'Switch to **manager-level** limited access mode', then you are currently in the hierarchy-based mode and must switch operating modes (page 251).

Warning: When switching from hierarchy to manager mode, all hierarchy information and limited access assignments are lost. See '**Switch Operating Mode**' on page 251 for more information.

Options

Switch to the manager-level limited access mode Apply

Grant access automatically to all new Projects, Tasks, Task Groups, Employees, Teams

Limited Access configuration options

Establish the default assignments for new items:

The status of the second checkbox 'Grant access automatically to all new Projects, Tasks, Task Groups, Employees, Teams' determines if and how limited access assignments are automatically created when new items are added.

Checked:

- When a new project, task, task group, employee or team is added, the item is automatically assigned to all managers.

Unchecked

- When a new project, task, task group, employee or team is added, only the person who created the item is assigned. All other managers requiring access to the new item must be assigned manually.


1. **Check** or uncheck the option.
2. Click the **Apply** button.
3. Acknowledge the Warning message by clicking **OK**.

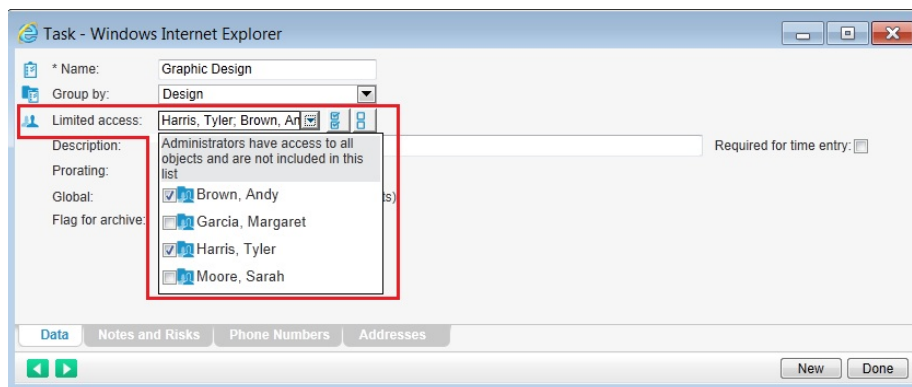
Note: Changing the status of this checkbox has no impact on existing limited access assignments. Only newly created projects, tasks, task groups, employees and teams are affected.



Assign managers to projects, tasks, task groups, employees, teams

The following details (1) how to limit access to a specific project, task, task group, employee or team using the item's properties window; (2) how to limit access to multiple items via the Security view; and (3) how to review limited access assignments.

To assign managers to a single item:

1. Locate the item either from the **Project Assignments** view or from the **Items List** tab.
2. **Double click** the item or select the item and click the properties button  on the toolbar.
3. Expand the Limited Access drop-down list.

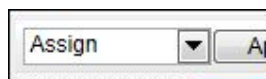


4. **Check** the managers who require access to this item. Click the 'check all' icon  to select all. Clicking the 'unselect all' icon  removes all checkmarks with exception for the manager modifying the item. Users who have Administrator security rights automatically have access to all items and are not listed.
5. Click anywhere outside the list window to close the drop-down list.
6. Click **Done**.

Note: The list of managers displayed in the Limited Access drop-down is automatically generated from users having access to the Administrative areas of the software. Excluded from this list are users who are assigned to the Administrator Security Group because they cannot be denied access to any item.

To assign managers to multiple items:

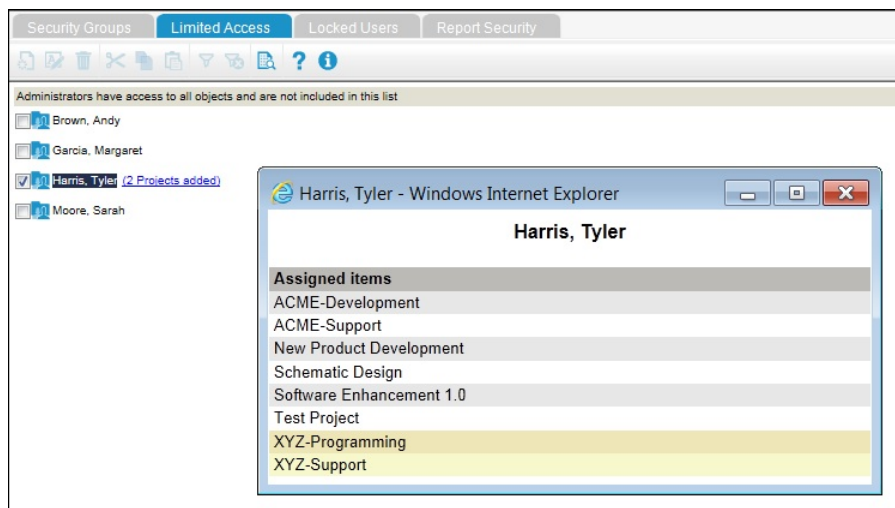
1. Select **Security** from the menu (Menu > Setup tab > Security).
2. Select the **Limited Access tab**.
3. Select the **Assign Limited Access** tab above the right side pane.
4. Make sure that 'Assign' is selected in the drop-down list above this tab. Instructions for the other drop-down options follow (Unassign, Replace, Assign to All).



5. Select Projects, Tasks, Task Groups, Employee or Teams from the drop-down list.
6. From this list, select one or more **items**.
7. From the list on the left, check the **managers** to assign to the items.
8. Click **Apply**.

Note: Tasks created in the Project Planning tool are not available in Limited Access.

Next to each manager with a new assignment, there is a text link summarizing the limited access assignment changes made for the manager. Clicking on the link displays an itemized list of the assignments. New limited access assignments are highlighted in yellow/gold.



Limited Access assignments review

Modifying limited access assignments:

The Assign Limited Access tab also permits bulk modifications to be made to existing assignments. These are:

- **Assign to All:** To assign all managers to the selected items
 - **Replace:** To replace an item's assigned managers with one or more other managers
 - **Unassign:** To remove assignments
1. Select the action from the drop-down list (Unassign, Replace, Assign to All).
 2. Select Projects, Tasks, Task Groups, Employees or Teams from the drop-down list.
 3. From this list, select one or more **items**.
 4. From the list on the left, check the **manager** for the action. Not applicable for Assign to All.
 5. Click **Apply**.

Tip: To uncheck all managers, right click in the left pane and choose **Uncheck All**.

Notes:

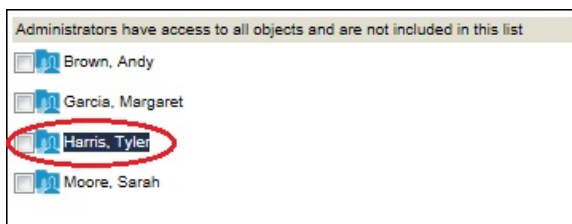
- When Assign to All is selected, note in the left pane that the checkboxes next to the managers are removed and that no summary information link is displayed after using Assign to All.
- Manager-level mode is the default limited access operating mode when a new database is created.
- While in manager-level mode, the Managers tab is disabled. The Managers tab is only required in hierarchy-based mode.
- A maximum of 1024 managers can exist in the database.
- Tasks created in the Project Planning tool are not available in Limited Access.

To review what items a manager is assigned to:

From the Limited Access tab in the Security view.

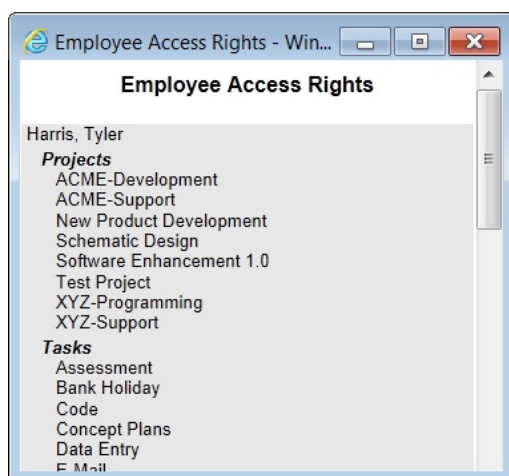
On the **left side** pane:

1. Click on the manager's name.



2. Click the **View Access Rights** button  on the toolbar above the list.

A pop-up window is displayed showing the projects, tasks, task groups, employees or teams the manager has been assigned to.




Tip: Using your keyboard, press **Ctrl+P** to print this window.

To review which managers have been assigned to an item:

From the Limited Access tab in the Security view.

On the **right side** pane:

1. Select the **type** of item to review (Project, Task, Task Group, Employee or Team).
2. Select one or more **items** from the list.
3. Click the **View Access Rights** button  just above the list.

A pop-up window is displayed showing which managers have been assigned to the item.

Limited Access - Hierarchy-based mode

Limited access is a security mechanism capable of giving managers access to only certain projects, tasks, task groups, employees or teams while in the administrative areas of the software. For example, you may want a manager to be able to view and report on some projects while excluding access to other projects. Limited access is required to apply this level of control.

Hierarchy-based mode is one of the 2 ways limited access can be configured. The other is Manager-level mode. The differences between both modes were described on page [228](#).

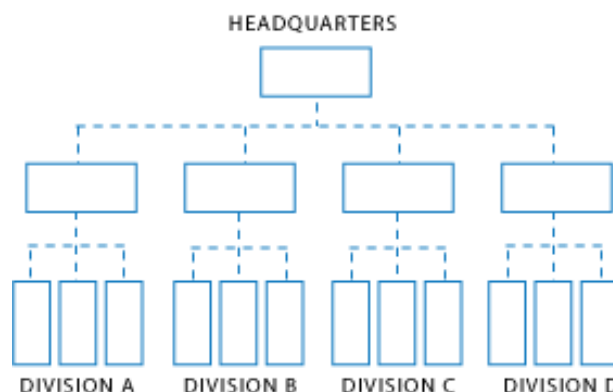
In Limited Access - Hierarchy-based mode ...

Overview	page 236
Preparation.	page 238
Hierarchy Guidelines	page 239
Creating Access Groups	page 241
Assigning Managers to Access Groups	page 243
Assigning Access Groups to items	page 245
List of the views and tools affected by Limited Access	page 253

Overview - Hierarchy-based limited access

In the **Hierarchy-based** mode, you assign access security to projects, tasks, etc., via pools of managers called 'Access Groups'. Access groups can be organized to emulate your company's departments, divisions, etc. Creating access groups and nesting these groups makes it easier to give, modify or deny permission to many managers at once.

Hierarchy-based mode is most beneficial when there are changes or additions to assignments. When a new manager joins a department, business unit, team, etc., there is no need to manually assign access to all the different projects and tasks the manager requires. You make the new manager a member of an existing access group and then all items available to the access group are automatically available to the new manager. The same time-savings are evident when a new item is created (project, task, task group, employee or team). After creating a new item, you assign the applicable access groups to it to make it available to the appropriate managers.



The use of hierarchical (nested) access groups also means that permissions are automatically assigned based on the hierarchy. This means that when a lower-level access group is assigned to a project, all the parent access groups in the chain automatically have access to the project.

In typical practice, when adding or editing a project, task, task group, employee or team (via the item's properties window), there is a Limited Access field from which you are able to select which access groups are able to view and report on the particular item. The managers who are members of the selected access group, and any parent access groups in the hierarchy branch, are permitted to view and report on the item. Note that Access Groups only need to be designed for those employees with security rights to the Administrative areas of the software. Employees who are restricted to the time entry tool do not need to be considered in the hierarchy.

Once limited access is applied, again using projects as an example, managers presented with a list of projects when creating assignments, running reports, etc., only see the projects they are permitted to view. A summary list of the views and tools modified by applying limited access is located at the end of this section (page 253).

TABLE: Simplified deployment of limited access applied to projects

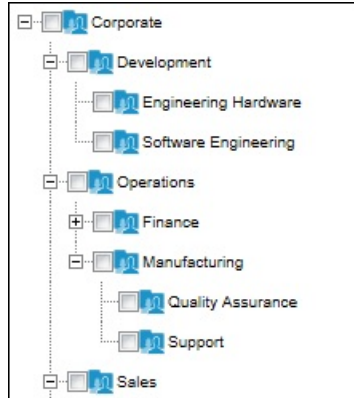
	Access Group 1 (Headquarters)	Access Group 2A (Division A)	Access Group 2B (Division B)
Project A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Project B	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Project C	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Project D	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Project E	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Project F	<input checked="" type="checkbox"/>		

As represented in the table above, projects A through F have each been limited to one or more Access Groups. When a member of Access Group 2B is in the administrative areas of the software, only projects B, D, and E are available. The same access control can be applied to tasks, task groups, employees and teams.

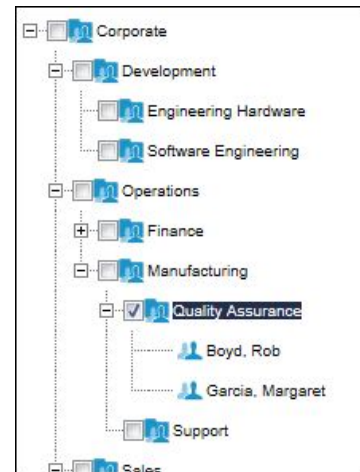
Creating and using hierarchy-based limited access is a 3-step process. You first design and create the access group structure, make each manager a member of one or more access groups and then assign the access groups to projects, tasks, task groups, employees and teams.

The following diagram summarizes the 3 steps. Each step is detailed in the pages that follow.

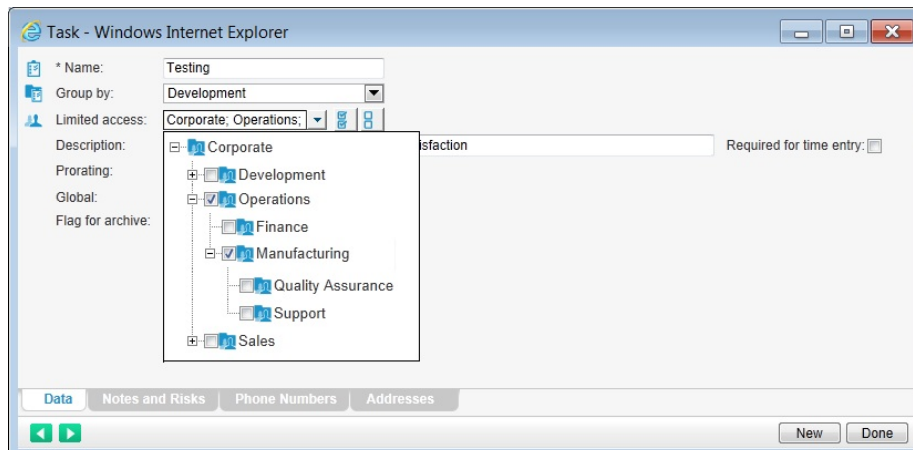
1. Create the Access Group structure/ hierarchy using the Limited Access tab. (page 241)



2. Assign the managers to the Access Groups as required. (page 243)




3. Assign Access Groups to projects, tasks, task groups, employees and teams. (page 245)



Preparation - hierarchy-based limited access

Prior to using Limited Access, there are 2 configuration items to check. You need to verify if Hierarchy-based is the current limited access configuration - and switch if necessary. You also need to review the option to automatically assign limited access to new items.

Verify the current limited access operating mode:

1. Select **Security** from the menu (Menu > Setup tab > Security).
2. Select the **Limited Access** tab.
3. Expand the **Options** window at the very bottom by clicking on the expand  button.
 - If the label next to the first check box is 'Switch to **manager-level** limited access mode', then you are currently in the Hierarchy-based operating mode and no changes are required.
 - If the label shows 'Switch to **hierarchy-based** limited access mode', then you are currently in the manager-level mode and must switch operating modes (page 251).

Establish the default assignments for new items:

The status of the second checkbox 'Grant access automatically to all new Projects, Tasks, Task Groups, Employees and Teams' determines if and how limited access assignments are automatically created when new items are added.

Checked:

- When a new project, task, task group, employee or team is added, all access groups are automatically assigned to the item.

Unchecked

- When a new project, task, task group, employee or team is created, the creator's access group, and all parent access groups, are automatically assigned to the item.

1. **Check** or uncheck the option.
2. Click the **Apply** button.
3. Acknowledge the Warning message by clicking **OK**.

Under either option, when a new access group is created, the access group has automatic access to any item that is currently available to all other access groups. These are considered public items.

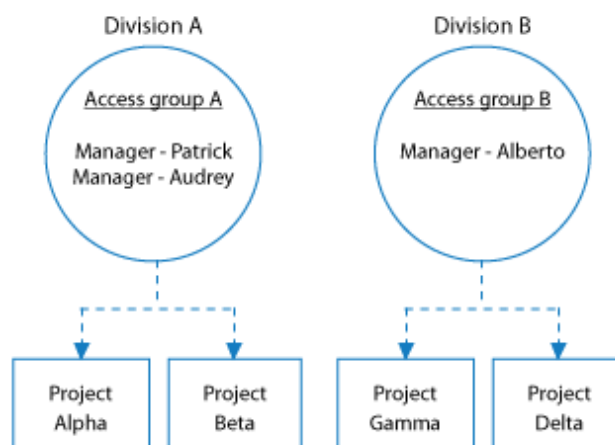
Note: Changing the status of this checkbox has no impact on existing limited access assignments. Only newly created projects, tasks, task groups, employees and teams are affected.

Access Groups Hierarchy - Guidelines and Considerations

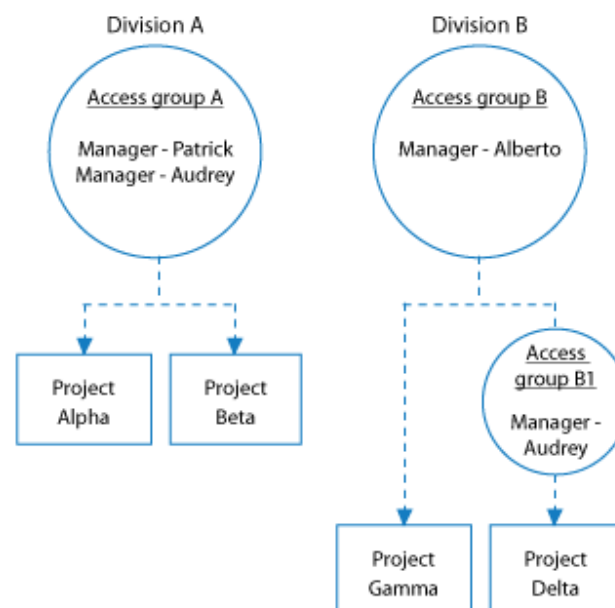
Designing an Access Group hierarchical structure:

- Design your Access Group hierarchy for the administrators, managers, team leaders and empowered users who have access to the Administrative areas of the software. These are considered 'managers'. There is no need to consider those employees who only have access to the Time & Entry tool since they are already limited to views, tools and information by their Security Group and by their specific project and task assignments.
- Your company's organization chart is a good starting point. However, its goal is to represent who reports to whom. Typically, this means that a manager only reports to one superior and therefore that manager can only belong to one branch. This structure may not be ideal when managers are shared across departments, business units, etc., and they require access to certain items normally limited by conventional boundaries. You may need to create additional access groups (as shown below) when faced with these situations.

- a. Part of your hierarchical structure, when based strictly on your organizational chart, may initially look like this.



- b. But if Manager Audrey is 'loaned' to Division B to work on Project Delta, assigning Audrey to Access Group B would mean that she would have access to Project Gamma as well. To give Audrey access to Project Delta and not Gamma, you could create a new sub-level Access Group B1 and assign her to it.



- c. This way Audrey only has access to Project Delta on the Division B side, while Manager Alberto retains access to Projects Gamma and Delta.

Tips:

- You can assign a manager to multiple access groups. However, within any one branch of the hierarchy, a manager should only be assigned to one access group - to the highest applicable level.
- Try to give each access group a unique name or identifier so that it is easy to recognize when a list of access groups is presented.
- Lay your hierarchy out on paper and run 'what if' scenarios to check the design.

Keep in mind:

- The goal of the hierarchy is to restrict access to information relating to projects, tasks, task groups, employees and teams and is not a 'who reports to whom' chain of command.
- When an access group is assigned to an item, all access groups above it (parent groups) automatically have access to the item.
- When a manager is assigned to an access group then the manager has access to all items associated with any access group below it (sub-level access groups).
- A 'reference card' is provided on page [249](#) summarizing the results of creating assignments.

Access Groups

NOTE: It is only possible to create Access Groups and access group hierarchies while working in the hierarchy-based operating mode.


The Limited Access tab is the location where access groups are created and managed, and is from where managers are made members of access groups. From the Limited Access tab, it is also possible to assign access groups to projects, tasks, task groups, employees and teams.

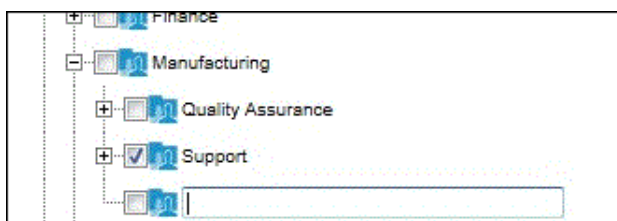
Tip: If you have just switched from manager-level mode to hierarchy-based mode, you may want to remove the access groups automatically created during this switch. See [Switch Operating Mode \(page 251\)](#) for details on removing unwanted access groups.

Prerequisite:


- It is best to have your hierarchy structure designed and reviewed prior to building it in the Limited Access view.

Create an Access Group:

1. Select **Security** from the menu (Menu > Setup tab > Security).
2. Select the **Limited Access** tab.
3. By design, new access groups must be located under a parent access group. The parent access group can be either the top level (root) access group or any other existing access group. Locate and **click on** the access group under which the new access group is to be added.
4. Click the **New** button  on the toolbar. An edit box is displayed under the parent folder.



5. Enter a **name** for the new access group.
6. Press **Enter** or click elsewhere to save.


By default, no managers are assigned to a new access group, but the access group may be automatically assigned to some projects, tasks, etc. This is because any item that is available to all existing access groups is considered a 'public' item. As such, when a new access group is created, it is automatically assigned to any of these 'public' items. You can check for any such automatic assignments by clicking on the newly created access group's name and then clicking the View Access Rights button  on the toolbar.

The next step is to assign managers to the new access group ([page 243](#)).


Notes:

- It is not possible to insert a new access group in the middle of an existing branch. If this need does arise, it can be accomplished using the cut/copy/paste commands.
- When a new access group is created, all projects, tasks, task groups, employees and teams later assigned to it are automatically available to parent access groups in the hierarchy branch.

About the root folder:

- The root/top (highest level) access group is created by default and cannot be removed. The name applied to the root access group is taken from the Company Name field in the Database Options.
- The name can be changed using the Rename button  on the toolbar.
- The root access group is automatically assigned to all projects, tasks, task groups, employees and teams. This is to ensure that all items are available to at least one manager. One manager must always be assigned to the root access group.
- The manager assigned to the Root folder is the user who first switched the operating mode from manager-level to hierarchy-based mode. Additional managers can be assigned to the root access group.

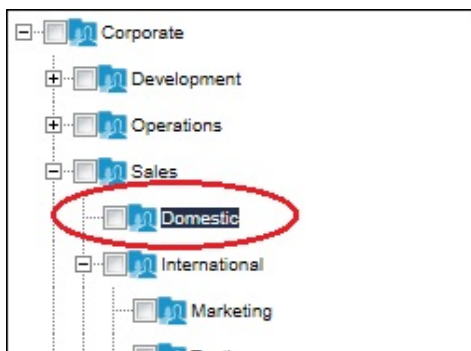
Tips:

- You can rename any access group by selecting the access group and then clicking the **Rename** button  on the toolbar.
- Many functions located on the toolbars can also be found by right clicking in the pane.
- The **Cut/Copy/Paste** functions on the toolbar permit access groups, sub-level access groups and their assignments to be copied and pasted. This may be beneficial when the hierarchy needs to be restructured.

Delete an Access Group:

Warning: Deleting an access group also deletes any sub-level access groups and any limited access assignments associated with it.

1. Verify that the **Managers tab** is selected in the right side pane.
2. Click on the **Access Group's** name.



3. Click the **Delete** button  on the toolbar.


Assign Managers to Access Groups

When a manager is a member of an access group, that manager has access to any items (projects, tasks, task groups, employees and teams) associated with the access group. The manager also has access to any items associated with any sub-level access groups. The following details how to assign managers to access groups and how to review assignments.

Prerequisite:

- The hierarchy structure should be completed (page 241) before assigning managers to access groups.

To assign managers to an access group:

- Select **Security** from the menu (Menu > Setup tab > Security).
- Select the **Limited Access** tab.
- Verify that the **Managers** tab is selected in the right side pane.
- In left pane, check the access group to assign. If there is a hierarchy of access groups, select the top most access group applicable to this manager. There is no need to check any sub-level access groups as the manager will automatically have access to these.
- In the right side pane, select the manager from the list.
- Click the **Assign** button  on the toolbar above the list of managers.

Once managers have been assigned to access groups, the next step is to assign the access group to projects, tasks, task groups, employees and teams (page 245).

Important consideration:

Users with full Administrator security rights are not automatically assigned to the root/top access group and therefore will not necessarily be able to view all projects, tasks, etc. This is a change from previous versions of Dovico Timesheet or Track-IT Suite where an 'Administrator' had access to everything.

Tips:

- Many functions located on the toolbars can also be found by right clicking in the pane.
- Right click and select Uncheck All to clear all checked access groups.



To review which managers belong to an Access group:

From the **left side** pane:


- Locate and expand the access group to reveal the managers assigned to the group. Note that any managers assigned to higher level access groups in the same branch also belong to this access group.

To review which access groups a manager is assigned to:

From the **right side** pane:


- Select the **manager** from the Managers tab list.
- Click the **Filter** button  in the left side toolbar.
The access group hierarchy tree displays the access groups for the manager and any parent groups.
- Click the **Remove Filter** button  to clear the filter.

To unassign managers from access groups:

1. In the right side pane, select the **Managers tab**.
2. Check one or more access groups to unassign in the left pane.
3. Select the managers to unassign from the Managers list on the right.
4. Click the **Unassign** button  on the toolbar above the list of managers.

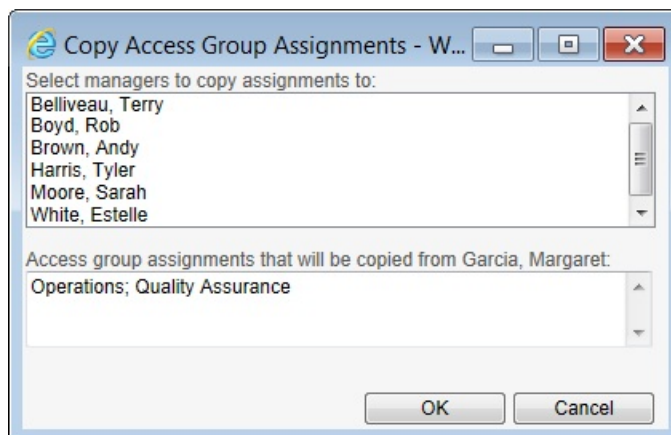
Copy a manager's limited access assignments:

The copy assignments function enables one manager's limited access assignments to be copied to one or more other managers.

1. In the right side pane, select the **Managers tab**.
2. From the list, select the **manager** whose assignments will be copied.
3. Click the **Copy Assignments** button  on the toolbar.

The Copy Access Group Assignments window opens.




4. Select the **managers** receiving the assignments.
5. Click **OK**.



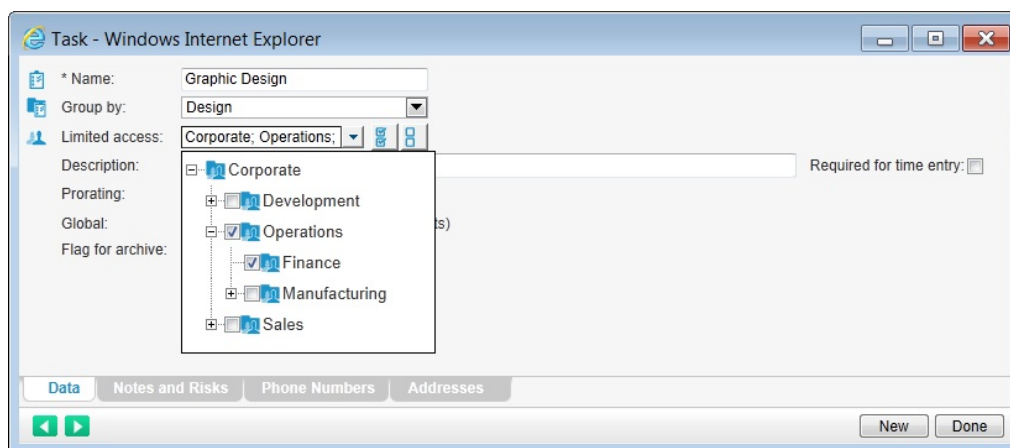
Assign access groups to a project, task, task group, employee or team

You can limit access to projects, tasks, task groups, employees or teams using each item's properties window or you can assign limited access in bulk via the Security view.

To assign an access group to a single item:

1. Locate the item either from the **Project Assignments** view or from the **Items List** tab.
2. **Double click** the item or select the item and click the properties button  on the toolbar.
3. Expand the Limited Access drop-down list. Existing assignments are shown as checked.
4. **Check** the access groups who require access to this item. Click the 'check all' icon  to select all. Clicking the 'unselect all' icon  removes all extra checkmarks. The access group that the person editing the item belongs to remains checked.

When an access group is checked, any parent access groups are automatically checked. This guarantees that parent access groups always have access to items that belong to sub-level access groups. For example, using the image below; when the Finance access group is selected, its parent group (Operations) is automatically selected.



5. Click anywhere outside the list window to close the drop-down list.
6. Click **Done**.

Tips:

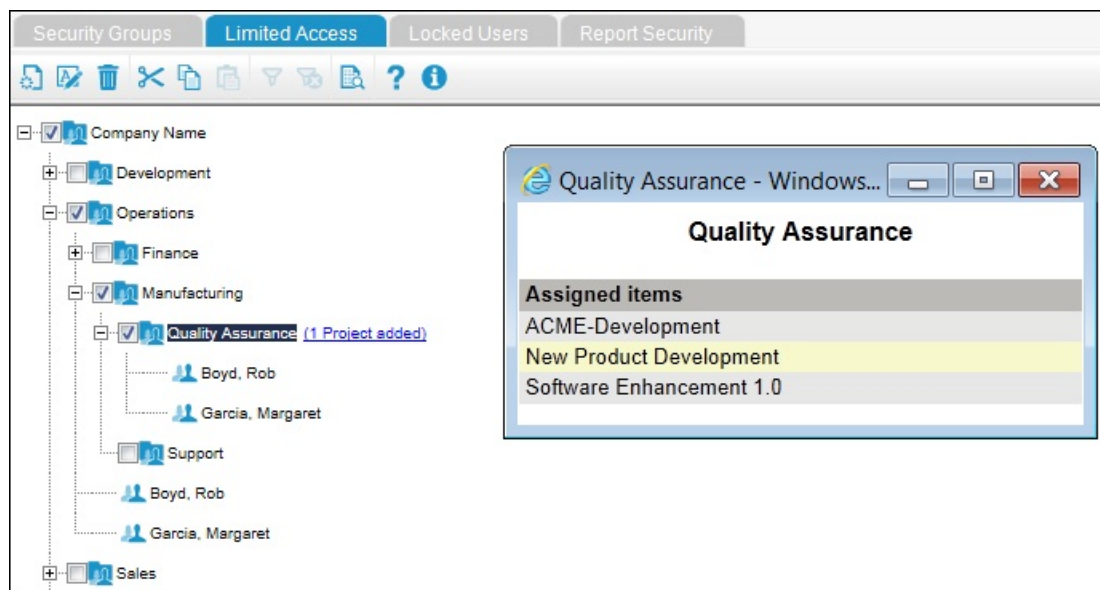
- With the limited access list expanded, keep your mouse over an **access group name** to display the managers who are members of the access group.
- Many functions located on the toolbars can also be found by right clicking in the pane.

Note: Tasks created in the Project Planning tool are not available in Limited Access.

To assign access groups to multiple items:

1. Select **Security** from the menu (Menu > Setup tab > Security).
2. Select the **Limited Access** tab.
3. Select the **Assign Limited Access** tab at the right.
4. Make sure that Assign is selected in the drop-down list above this tab. Instructions for the other drop-down options follow (Unassign, Assign to All, Replace).
5. Select Projects, Tasks, Task Groups, Employees or Teams from the drop-down list.
6. From this list, select **the items**.
7. From the hierarchy tree on the left, check the **access group** to assign to the items. When a sub-level access group is checked, all parent access groups in the branch are automatically checked. This guarantees that parent access groups always have access to items that belong to sub-level access groups.
8. Click **Apply**.

Next to each access group with a new assignment, there is a text link summarizing the assignment changes made for the access group. Clicking on the link displays an itemized list of the assignments. Additions are highlighted in yellow/gold.




Note: Tasks created in the Project Planning tool are not available in Limited Access.

To see what items have been assigned to an access group:

From the Limited Access tab in the Security view.

In the **left side** pane:

1. Click on the **access group's name** in the hierarchy tree.
2. Click the **View Access Rights button**  on the toolbar above the list.

A pop-up window is displayed showing what projects, tasks, task groups, employees and teams have been assigned to the access group.




Tip: Using your keyboard, press **Ctrl+P** to print this window.

To see what access groups an item has been assigned to:

From the Limited Access tab in the Security view.

In the **right side** pane:

1. Select the **Assign Limited Access** tab.
2. Select the **type** of item to review (Project, Task, Task Group, Employee or Team).
3. Select one or more **items** from the list.
4. Click the **View Access Rights** button  just above that list.

A pop-up window is displayed showing which access groups the item is assigned to.



Modifying limited access assignments:

The Assign Limited Access function also permits bulk changes to be made to existing assignments. These are:

- **Unassign:** To remove assignments. Note that when in Unassign mode and an access group is checked, all sub-level access groups in the branch are also checked. This guarantees that, when an item is no longer available to an access group, it is also removed from any sub-level access groups.
- **Replace:** To replace an item's assigned access groups with one or more other access groups.
- **Assign to All:** To assign the selected items to all access groups. When Assign to All is selected, please note in the left pane that the checkboxes next to the access groups are removed and that no summary information link is displayed after using Assign to All.

1. Select the action from drop-down list (Unassign, Replace, Assign to All).
2. Select Projects, Tasks, Task Groups, Employees or Teams from the drop-down list.
3. From this list, select one or more **items**.
4. From the list on the left, check each **access group** for the action. Not applicable for Assign to All.
5. Click **Apply**.

Notes:

- So that at least one manager has access to each item, each item is assigned to the Root (top level) access group and cannot be unassigned.
- A maximum of 1024 access groups can exist in the database.

Tips:

- It is important to have the right action selected from the Action drop-down before starting to check managers on the left because switching the Action option clears all checkmarks made in the left pane.
- To uncheck all access groups, right click in the left pane and choose **Uncheck All**.

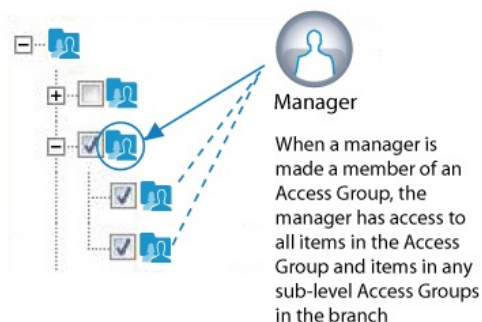
Reference - Hierarchy-based assignments

DOVICO

QUICK REFERENCE CARD

Hierarchy-based assignments

Assign a manager to an access group




This manager is a member of which Access Groups?

From the **right-side** pane:

1. Select the **manager** from the Managers tab list.
2. Click the **Filter** button  on the left side toolbar.
The access group hierarchy tree in the left pane displays the access groups for the *manager* and any parent groups.
3. click the **Remove Filter** button  to clear the filter.

This item is available to which Access Groups?

From the **right-side** pane:

1. Select the **Assign Limited Access** tab.
2. Select the **type** of item to review (Project, Task, Task Group, Employee or Team)
3. Select the **item** from the list.
4. Click the **View Access Rights** button  just above that list.


A pop-up window appears showing which access groups are assigned to the item.

Assign an Access Group to an item



This Access Group has access to what items?

In the **left side** pane:

1. Click on the **access group's name** in the hierarchy tree.
2. Click the **View Access Rights** button  on the toolbar above the list.

A pop-up window is displayed showing the projects, tasks, task groups, employees and teams that the access group has been assigned to.

Exceptions on where and how Limited Access is applied

There are specific situations and specific areas of the software where Limited Access is not applied or not fully enforced at lower levels of information.

The views and tools where limited access is not applied are those specifically designed for an administrator to use where system or bulk-type work is accomplished. These include Bulk Time Move, Security and Holiday Time Entry.

In some areas, limited access is only applied to the highest level item. For example: The Budgeted Time & Costs view is used to view and edit project estimates. The project is the highest level item in the view (in hierarchical terms) and the list of projects available is restricted using limited access. However, the list of tasks and employees shown in the view is not limited. The main reason to leave the task and employee lists 'open' is that if a user has access to a project, that person should also be able to see the tasks and employees assigned to the project even though he/she does not have explicit access to each task or employee assigned to the project. This same logic is applied to the Actual Time & Costs and Approval views.

When generating reports, limited access is applied depending on the type of report and the filters (projects, tasks, employees, etc.) required to finish the report. When a list of projects, tasks, employees etc., is presented, these are filtered using Limited Access. For other reports, there may be no list of employees presented when creating the report but the final report includes employees. In these situations, the employees shown in the final report are not filtered by limited access. These are normally administrative type reports.

Switching Operating modes - Limited Access


As highlighted on page 228, Limited Access can be configured in one of 2 operating modes: Manager-level or Hierarchy-based.

The following details (1) switching from manager-level to hierarchy-based, and (2) switching from hierarchy-based to manager-level.

Switch from manager-level to hierarchy-based limited access:


IMPORTANT: Have your hierarchy structure organized and ready to implement.

To switch to hierarchy-based limited access:

1. Select **Security** from the menu (Menu > Setup tab > Security).
2. Select the **Limited Access** tab.
3. Expand the **Options** window at the very bottom by clicking on the expand  button.
 - If the label shows 'Switch to **hierarchy-based** limited access mode', then you are currently in the manager-level mode and must switch operating modes - Go to step 4.
 - If the label next to the first check box is 'Switch to **manager-level** limited access mode', then you are currently in the Hierarchy-based operating mode **and no further action is required**.
4. Check the '**Switch to**' box.
5. Click **Apply**.
6. Acknowledge the warning message by clicking **OK**.

The following occurs after switching to hierarchy-based limited access:

In the left side pane

- A root access group is created. The name entered in the Database Options' Company Name field is initially used as the name for the root access group. This can be renamed using the Rename function .
- From the root access group, a sub-level access group is created for each employee having access to the Administrative side of the software.
- All limited access assignments made while in Manager-level mode are lost.
- The user who executed the switch is assigned as the member for the root access group.
- This structure appears identical to the previous mode but there are important differences:
 - Adding a new manager to the database does not automatically create an access group.
 - An administrator is able to create, edit or delete access groups.

In the right side pane


- The Managers tab is enabled.

Other

- All other users logged into the software are logged out.

Switch from hierarchy-based to manager-level limited access:

To switch to manager-level limited access:

1. Select **Security** from the menu (Menu > Setup tab > Security).
2. Select the **Limited Access** tab.
3. Expand the **Options** window at the very bottom by clicking on the expand  button.
 - If the label shows 'Switch to **manager-level** limited access mode', then you are currently in the hierarchy-based mode and must switch operating modes - Go to step 4.
 - If the label next to the first check box is 'Switch to **hierarchy-based** limited access mode', then you are currently in the Manager-level operating mode and **no further action is required**.
4. Check the '**Switch to**' box.
5. Click **Apply**.
6. Acknowledge the warning message by clicking **OK**.

The following occurs after switching to manager-level limited access:

In the left side pane

- All limited access assignments made while in Hierarchy-based mode are lost.
- An access group is created for each user having access to the Administrative area of the software - excluding Administrators.
- Until manual adjustments are made to assignments, ALL managers are assigned to all projects, tasks, task groups, employees and teams.
- This structure appears identical to the previous mode but there are important differences:
 - A manager = an access group.
 - Adding a new manager to the database automatically creates an access group.
 - Access groups cannot be added, edited or deleted.
 - Managers can no longer be assigned/unassigned from access groups.

In the right side pane

- The Managers tab is disabled.

Other

- All other users logged into the software are logged out.

Summary of views and tools affected by Limited Access

The following summarizes the views and tools to which Limited Access applies.

Employees & Projects > Assignments: Lists of projects, tasks, employees, teams and task groups are restricted.

Employees & Projects > Budgeted Time & Costs: List of projects is restricted.

Employees & Projects > Items List: Lists of employees, projects, tasks, teams and task groups are restricted.

Project Planning tool: Lists of projects, employees and teams are restricted with exception for the Vacation tab. All Teams and Employees are available in the Vacation tab.

Quick Assign: Lists of employees, projects, tasks, teams and task groups are restricted.

Reports: Report filter selection lists of projects, tasks, employees, task groups and teams are restricted.

Actual Time & Costs: List of projects is restricted.

Approved Expenses: Lists of projects and employees are restricted.

Holiday Time Entry: List of employees is restricted.

Time Calendar > monthly view: List of employees is restricted.

Time Calendar > time entry: List of employees is restricted.

Microsoft Project Link: List of projects is restricted.

Timesheet Options: List of employees is restricted.

Update Employee Properties: List of employees is restricted.

Locked Users

The Locked Users tab is used to manually unlock a user who has been locked from the software due to consecutive failed login attempts.

The software tracks failed login attempts by User ID and locks out a user when the number of consecutive failed login attempts reaches 5 within a span of 30 minutes. The user is automatically unlocked after 30 minutes but can be reset sooner by an administrator using the Locked Users tab in the Security section of the software.

To unlock a user:

1. Select **Security** from the menu (Menu > Setup tab > Security).
2. Select the **Locked Users** tab.
3. Select the user from the list.
4. Click the **Unlock** button.

Notes:


- The number of login attempts and the lockout duration value can be modified using the Database Options view (page 211).
- Access to the Locked Users tab is controlled by the 'Security - Groups' item in each Security Group.

Backup Audit Trail

The **Backup Audit Trail** function permits an authorized user to backup or extract audit trail information from the database.

See **Audit Trail settings** (page 209) for information on enabling the audit trail and details on what changes to the database are logged.

To backup an audit trail:

1. Select **Backup Audit Trail** from the menu (Menu > Setup tab > 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, uncheck 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 and Tips

Notes and Risks, Phone Numbers and Addresses tabs


For most items (projects, employees, clients, etc.) in the software, 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. **Display** column - this function is deprecated (no longer used).
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.

Filters


The software has 3 types of filters; basic filters (for most views), Project Assignments view filters and Limited Access group filters. The following describes how to use (1) basic and (2) limited access group filters. Go to page 78 to learn how to use filtering in the Project Assignments view.

Basic 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.

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**.
 - 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 basic filter:

- a. Click the **Remove Filter** button  on the toolbar.

OR

- b. Move to a different view.


Limited Access Group filter

Use the Limited Access Group Filter function to only view those items (projects, tasks, task groups or employees) that are assigned to specific access groups.



Notes:

- When the Limited Access Group filter is applied, it is automatically applied in 7 locations: Project Assignments view, Items List - Projects, Items List - Tasks, Items List - Task Groups, Items List - Employees, Items List - Teams and in the Reports view when selecting report parameters.
- Limited Access Group filters created in a view are personal and are not applied to other users.

To apply a limited access group filter:

1. From the applicable view.
2. Click the **Limited Access Group** filter button  on the toolbar.
3. A filter window opens.
4. Use the **Access Group** drop-down to select which access groups to apply as a filter.
5. Click **OK** to view the results.

To remove a limited access group filter:

1. Click the **Limited Access Group filter** button  on the toolbar.
2. Click the **Select All**  icon.
3. Click **OK**.

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. The Archive function will effectively accomplish the same as delete, but the item and all associated information will be stored in a separate, archive database.

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 the software 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/task.

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 that 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.

The attempt to deleted **employees, tasks** or **projects** that have associated time entries that are locked down (**Time Lockout**) will only be permitted for users with the appropriate Security option enabled (Time Lockout - Bulk Edit Override, page 224).

Flag for Archive

For any item in specific views (employees, projects, tasks, etc.), check the **Flag for archive** box if you would like this item is to be removed for the database and placed in the Archive Database. Archiving is an alternate to deleting. It effectively accomplishes the same as delete, but the item and all associated information is stored in a separate, archive database.

Note: While any manager can flag an item to be archived, the Archive function can only be performed by Dovico Support. It is offered as a professional service. Please contact your sales representative for details (<http://www.dovico.com/contactus.aspx>).

Careful consideration should be taken before archiving an item. The following points describe the implications of archiving some of the more important elements within the software:

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 **project** is archived, all the hours worked for that project are removed from the source database. All expenses entered for the project are 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.

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.

When Dovico Support performs the archive, all flagged items are removed from the source database and stored in the archive database.

Tip: You can review all items flagged for archive by using the Items Flagged for Archive report.

Integration

Dovico Planning & Timesheet's Integration section contains the built-in functionality permitting data to be linked to Microsoft Project or Active Directory.

If using QuickBooks to create invoices, our **QuickLink App** is available from Dovico Apps (<http://www.dovico.com/apps.aspx>) to send time and expenses from Dovico to QuickBooks.

For other applications, our **Import/Export App**, also available from Dovico Apps, is able to export time and expense entries from the Dovico database in .csv format.

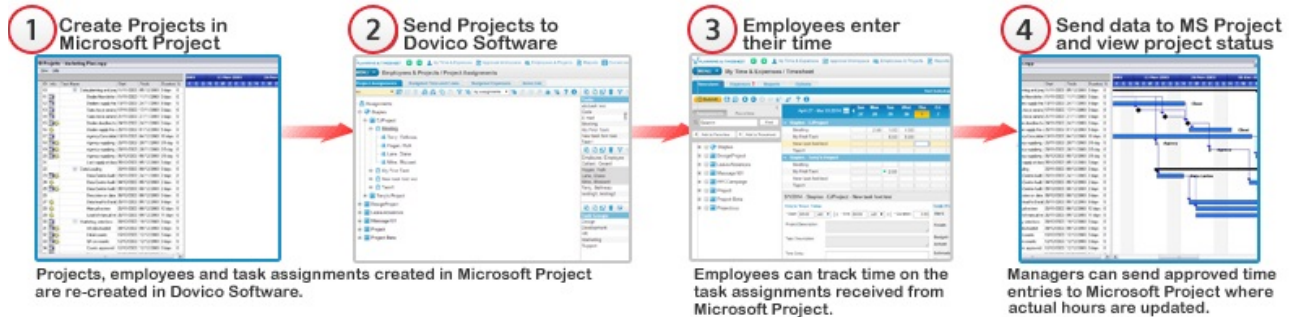
In Integration ...

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Data Transfer Overview	page 268
QuickLink App for QuickBooks.	page 270
Active Directory.	page 271
Import/Export App.	page 275

Microsoft Project

Use Dovico Planning & Timesheet's **Microsoft Project** Link to link project and task assignments created in Microsoft Project to Dovico.

Microsoft Project overview:



Important notes about using the Microsoft Project Link:

- Dovico Planning & Timesheet can link with Microsoft Project versions 2013, 2010, 2007, 2003 and 2002.
- Microsoft Project Server is not supported.

See **Microsoft Project Link** (page 262) to establish a link to Microsoft Project files.

An **overview** of the information transferred using the Microsoft Project Link is found on page 268.

Prerequisite:

The Microsoft Project link requires **ActiveX** controls and therefore only **Internet Explorer** can be used to link Microsoft Project files to Dovico.

When you access the Microsoft Project Link, Dovico Planning & 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 from should be added to your Trusted Sites list.

If the problem persists, please contact your administrator.

Microsoft Project Link

The following describes the 3 fundamental steps required to **setup** and **synchronize data** from Microsoft Project to Dovico. Details on how to send time entries from Dovico to Microsoft Project are described in **Send time to Microsoft Project** on page 266.

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 to synchronize projects, employees and task assignments from the Microsoft Project file.

Prerequisite:

- The Microsoft Project link requires **ActiveX** controls and therefore only **Internet Explorer** can be used to link Microsoft Project files to Dovico.

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'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.
- Microsoft Project must be registered/activated. It cannot be in trial mode.
- When adding a large Microsoft Project, it is recommended that the Audit Trail logging level be set to 'None' for the duration of the import process, and then returned to its previous state after the project has been added. Otherwise, users may experience problems using the software.
- 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, employees assigned to each project are automatically added to the Dovico database.

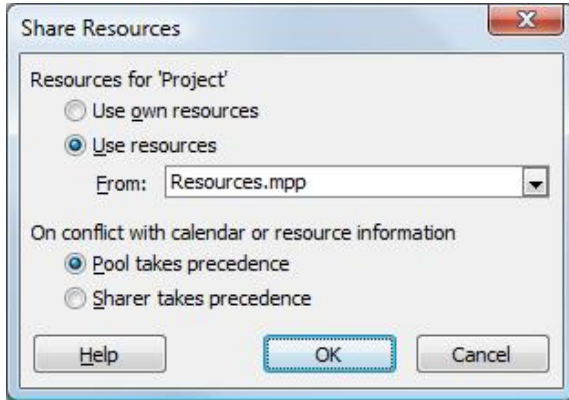
Warning: If an employee entered in the Resource Pool already exists in Dovico, that employee will be duplicated in Dovico the first time the link is created.

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. Employees must have both a first and last name to be successfully imported into Dovico.
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.
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 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 only accepts resource assignments made to the lowest level task assignments in Microsoft Project. The synchronization of assignments will fail if resources assignments are made to rolled-up tasks as shown below.

Assignments made at the **lowest task levels are supported.**

	i	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	Research & Development	
6		2.1	Data Entry	
7		2.1.1	Programming	
8		2.1.1.1	Bug Fix	John Doe ✓

Assignments made at the **'rolled-up' levels are not supported.**

	i	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	Research & Development	John Doe ✗
6		2.1	Data Entry	
7		2.1.1	Programming	John Doe ✗
8		2.1.1.1	Bug Fix	

- Dovico 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 Planning & Timesheet.
9. **Exit** Microsoft Project.

STEP 3: Create a link in Dovico Planning & Timesheet

After the link is successfully created:

- The project (with an .mpp extension) is added to the list of projects in Dovico. You can edit some project information in Dovico without affecting the link or Microsoft Project files.
 - The employees are added to the list of employees in the Dovico database.
 - Tasks are not added to the list of tasks in Dovico. 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. From Dovico, select **Microsoft Project** from the menu (Menu > Views tab > Microsoft Project).
 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. Locate and open the resource file.

Windows 2003 or XP

In the Look in box, use **Network Neighborhood** or **My Network Places** to find and open 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.

Windows 7, Windows 8, Vista

Use **Network** to find and open the resource file. **Do not use a Mapped Network Drive** to locate the file.

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
Resource first name		Employee first name
Resource last name		Employee last name
Resource e-mail address (optional)		Employee e-mail address

7. For each employee added, you 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 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. 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. 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
Projects		Projects
Tasks		Tasks
Resource Assignments		Task Assignments
Work		Estimated hours
Assignment Start and Finish dates		Assignment Start and Finish dates
WBS code (optional)		WBS code (displayed in Budgeted Time & Costs view)
Publish (optional)		Show/Hide feature in Project Assignments view

The project assignments are now created in Dovico and employees can begin tracking their time against this project.

Instructions on how to **send time** from Dovico to the Microsoft Project file are found on the next page.

Notes:

- If you edit a project plan file in Microsoft Project, you 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.
- The projects, tasks and employees imported into Dovico may or may not be automatically available to all other managers using Dovico. The availability of imported items to other managers is determined by the status of the 'Grant Access automatically...' checkbox located in the Limited Access tab (page 231).

Sending time to Microsoft Project

The following describes how to send approved time from Dovico Planning & 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 268.

To send time to Microsoft Project files:

1. **Exit** Microsoft Project if it's currently running.
2. Select **Microsoft Project** from the menu (Menu > Views tab > Microsoft Project).
3. Select one or more **projects** from the Project list box.

When Dovico 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 in its scheduled period or around the project status date (see step 5 below).

Simplified example: In Dovico, 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 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 and Send ETCs

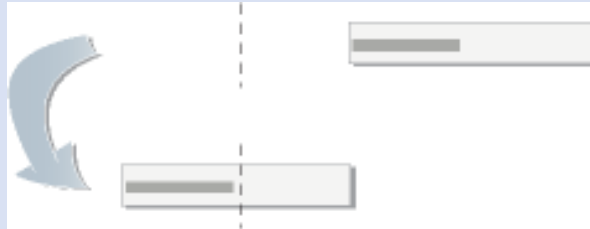
Status date:

- When **unchecked** 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 (Get Assignments) so employees can see their revised scheduled task dates.
 - a. Check the **Use status date** checkbox.
 - b. Click the **calendar icon** to select a status date. Normally, the project status date is set to the end of the reporting period.
 - c. 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) 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 unchecked, no ETC values are sent to Microsoft Project.

d. Click **OK**.

Approved time is sent to the Microsoft Project file.

Microsoft Project		Dovico
Approved time	▶	Actual Work
ETCs (optional)	▶	Remaining Work
Status date (optional)	▶	Project Status date

Notes:

- Only approved time in Dovico Planning & 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, the Remaining Work is equal to Work minus Actual Duration.
- If a time entry is deleted from Dovico, 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.

Data transferred using Microsoft Project

The following provides details on the data transferred between Dovico Planning & Timesheet and Microsoft Project when specific actions are performed using the Microsoft Project.

The following assumes the reader has working knowledge of Microsoft Project and Dovico's Microsoft Project Link.

Add/Get Resources

Clicking the Add/Get Resources button transfers all employees from the Microsoft Project Resource pool to the Dovico database. If Get Resources is selected a second time, only new and modified employees are synchronized back to Dovico. After its initial use, the Add/Get Resources button only needs to be used when modifications or additions are made to the Microsoft Project resource pool.

The employee first and last names and email addresses are transferred from Microsoft Project to Dovico. Employee properties are editable in Dovico except for the employee's First and Last name.

Microsoft Project		Dovico
Resource first name		Employee first name
Resource last name		Employee last name
Resource e-mail address (optional)		Employee e-mail address







Add Projects

Clicking the Add Project button transfers the selected project, its tasks and resource assignment details from Microsoft Project to Dovico. The Add Project button is only required when a new project is sent from Microsoft Project to Dovico.

The **project** is added to the Dovico database and some of its properties are editable using Dovico.







Tasks are not added to Dovico'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 (Estimated hours, Start and Finish dates and WBS codes).

Microsoft Project		Dovico
Projects		Projects
Tasks		Tasks
Resource Assignments		Task Assignments
Work		Estimated hours
Assignment Start and Finish dates		Assignment Start and Finish dates
WBS code (optional)		WBS code (displayed in Budgeted Time & Costs view)

Get Assignments

Clicking the Get Assignments button updates the task assignments information from Microsoft Project to Dovico. 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 plan file.

Microsoft Project		Dovico
Tasks		Tasks
Resource Assignments		Task Assignments
Work		Estimated hours
Assignment Start and Finish dates		Assignment Start and Finish dates
WBS code (optional)		WBS code (displayed in Budgeted Time & Costs view)
Publish (optional)		Show/Hide feature in the Project Assignments view

Send Time

Clicking the Send Time button sends approved time from Dovico to Microsoft Project.

Approved time is sent as new (or additional) hours per assignment and appears as Actual Work in Microsoft Project.

If selected, **ETC** values (in hours) are transferred from Dovico to Microsoft Project. These appear as Remaining Work in Microsoft Project.

- If selected, the **project status date** is transferred from Dovico to Microsoft Project.

Microsoft Project		Dovico
Approved time		Actual Work
ETCs (optional)		Remaining Work
Status date (optional)		Project Status date

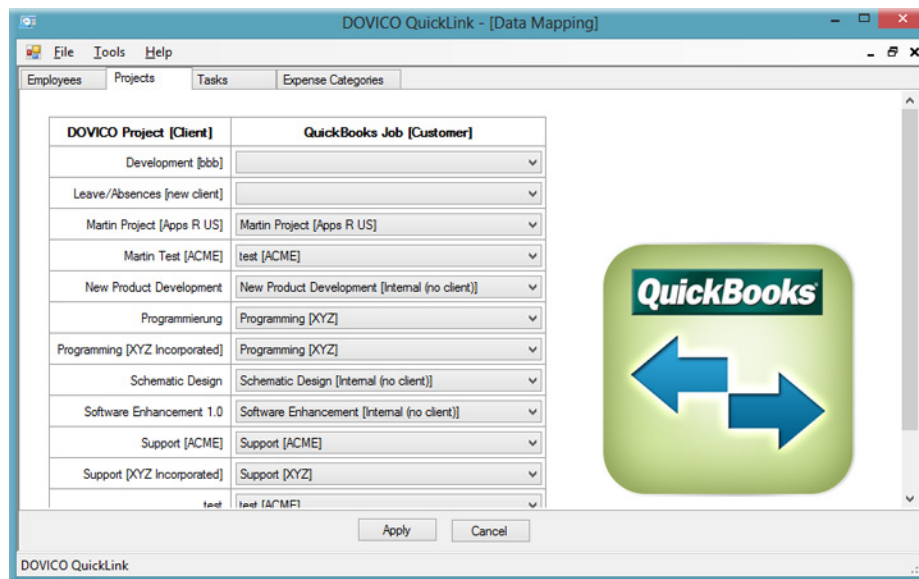
Synchronize All: Clicking the Synchronize All button will perform the functions, described above, in the following order: Get Resources, Get Assignments and Send Time.

QuickBooks

Do you use QuickBooks to invoice your clients or to pay your employees?

Dovico's **QuickLink** app has the ability to transmit time and expenses to QuickBooks. From QuickBooks, time entries can then be used to invoice clients or pay employees. Transmitted expenses can be used to reimburse employees or to pay vendors.

Go to Dovico Apps (<http://www.dovico.com/apps.aspx>) for all the details or call us at 1-800-618-8463 or 00 800 4618 8463.



Active Directory

Dovico Planning & Timesheet's integrated link to Microsoft's **Active Directory service** allows employees to be imported from Active Directory and also authenticates Dovico logon user IDs and passwords against Active Directory.

Instructions when using the Microsoft Project Link

Please follow the alternate instructions on page [273](#) if you are planning to link employees to both Active Directory and Microsoft Project.

The **Active Directory** link is located in Menu > Views tab > Active Directory.

To synchronize employees with Active Directory:

Prerequisite:

- Employees entered in Active Directory must have 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).

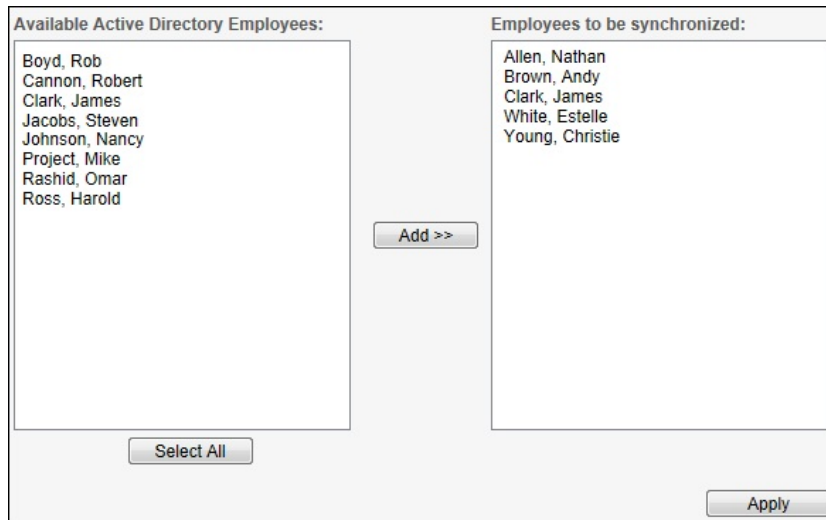
Tips:

- 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.

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 Planning & Timesheet are listed in the left column (**Available Active Directory Employees**) and all employees currently synchronized are listed in the right column (**Employees to be synchronized**).

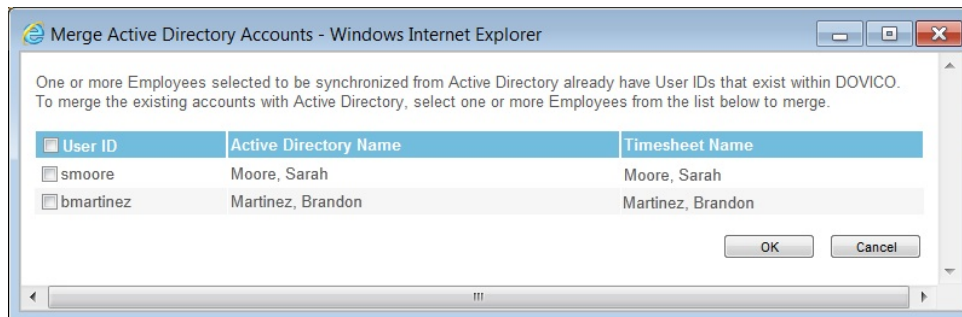
Tip: You should consider having at least one Dovico user with full Administrative access not synchronized with Active Directory. This can avoid everyone one being locked out of the software if there are connectivity issues with the Active Directory server. Example; moving/replacing the Active Directory server.



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. For each newly imported employee, the employee's **security level and software access** properties must be set before the employee is able to login.

In the case where employees already exist in the Dovico database (i.e. have identical User IDs), a new window opens offering the option to merge the conflicting employee account information in the Dovico database. When merged, an employee's first name, last name, user ID, password and e-mail address established in Dovico are overwritten with the information from Active Directory.

- a. Check each **employee** to overwrite.
- b. Click **OK**.



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 database and the password cannot be modified using any Dovico component.
- Dovico's login page 'forgot password' feature will not work with employees synchronized with Active Directory.
- 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.
- The First Name, Last Name, User ID and e-mail address fields in Dovico Planning & Timesheet have limits on the number of characters permitted. Data imported from Active Directory that exceeds these limits are 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.
- The projects, tasks and employees imported into Dovico may or may not be automatically available to all other managers using Dovico. The availability of imported items to other managers is determined by the status of the 'Grant Access automatically...' checkbox located in the Limited Access tab (page 231).

Active Directory and Microsoft Project

The following details how to link employees to both **Active Directory** and a **Microsoft Project** resource pool. Use the standard Active Directory instructions on page 271 to link those employees who are not part of a Microsoft Project resource pool.

Prerequisites

- The employees must already exist in a Microsoft Project resource pool.
- The Microsoft Project resource pool must already be synchronized with Dovico.
- Employees entered in Active Directory must have a First and Last name.

Notes:

- Once the steps that 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.
- Dovico's login page 'forgot password' feature will not work with employees synchronized with Active Directory.
- If an employee name is changed in Active Directory, the employee name in the Microsoft Project resource pool will be updated but the employee name in individual Microsoft Project project files are not automatically updated. Dovico 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 Planning & 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 Planning & Timesheet:

2. Select **Items List** from the menu (Menu > Views tab > Employees & Projects > Items List).
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 (from step1).
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 (from step 1).
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 Menu > Views tab > Active Directory.

The following assumes that Active Directory Connection Information has been established and the connection verified. (page 271)

All Active Directory employees that have not been synchronized to Dovico Planning & Timesheet are listed in the left column (**Available Active Directory Employees**) and all employees currently synchronized are listed in the right column (**Employees to be synchronized**).

Tip: You should consider having at least one Dovico user with full Administrative access not synchronized with Active Directory. This can avoid everyone one being locked out of the software if there are connectivity issues with the Active Directory server. Example; moving/replacing the Active Directory server.

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 database.
 - a. Check each **employee** to overwrite.
 - b. Click **OK**.
5. For each newly imported/merged employee, the employee's security level and software access properties should be reviewed.

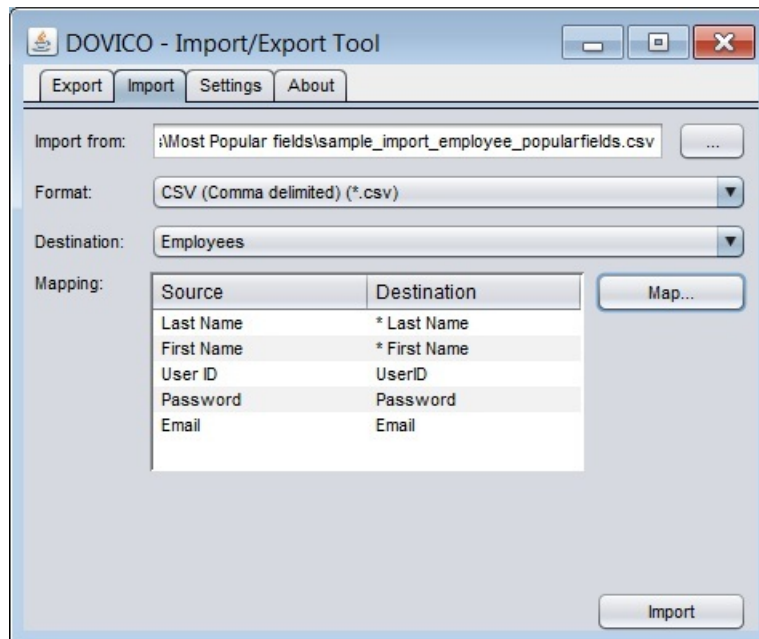
Import/Export

Are you just starting out with Dovico hosted services? Do you need to import some of your previous data to get started quickly? Or have you been using the Dovico hosted services for a while and now want to export some data?

Dovico has the ability to transfer information (employees, tasks, projects, time entries, etc.) between Dovico and other applications using .csv files.

To try our **Import/Export App**.

Go to Dovico Apps (<http://www.dovico.com/apps.aspx>) for all the details or call us at 1-800-618-8463 or 00 800 4618 8463.



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 their own time and expenses.

Since accurate and efficient time and expense entry is the core to successful time and project tracking, the software'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.

Don't forget to check out Dovico Apps on a regular basis (<http://www.dovico.com/apps.aspx>). We have apps for time and expense entry that employees can use with their smartphones and tablets (Android, iPhone and BlackBerry).

In Time and Expense Entry ...

Time Entry Overview	page 277
Adding assignments to the time entry grid	page 279
Entering time in bulk	page 281
Track time while working	page 284
Track time using Start/End times	page 286
Time entry details	page 288
Submitting time	page 290
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Expenses Entry Overview	page 301
Entering expenses	page 303
Entering mileage	page 305
Submitting expenses	page 306
Time & Expense Reporting	page 311

Time Entry

Introduction to the Timesheet screen

The time entry screen (**Timesheet**) contains 5 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 you enter your 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 allows you 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.

The screenshot shows the Timesheet application interface with the following sections highlighted by red boxes and numbered callouts:

- 1**: Assignment Tree (left sidebar)
- 2**: Timesheet grid (main table)
- 3**: Time Entry Details (bottom section)
- 4**: Calendar Row (top right)
- 5**: Toolbar (top left)

Assignment	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	ETC
Analysis and Reporting									
Design		5.00	1.00	3.00				9.00	
BMW - Crash Test Dummies									
Research			2.00	4.25	3.00	1.75		11.00	40.00
Specifications									
Testing									
Leave/Absences									
Bank Holiday								0.00	
Vacation								0.00	
Summary									
Approved	0.00	0.00	7.00	7.00	2.00	0.00	0.00	20.00	

014 - ACME - Development - Design

Track Your Time

* Start: 08:00 AM | * End: 09:45 AM | * Duration: 1.75

Time Entry: Description as entered by the employee

Task Progress

Start: Wednesday, April 23, 2014












Finish: Wednesday, April 23, 2014

Budget - Actual: 55.00 - 11.00 = 44.00

Estimate To Complete (ETC): 40.00

Time Entry Toolbar buttons

Timesheet toolbar

	Submit: To send your time entries to the Dovico database.
	Rejected time entries: To see a list of weekly timesheets that contain rejected time entries.
	Exception Request: To request that a date range be unlocked to permit time to be added or submitted. Only available if Time Lockout is used.
	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.
	View approval paths: To review approval paths for submitted time and expenses.
	Help: To launch the Help system.
	About: To display information on the software version.

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.

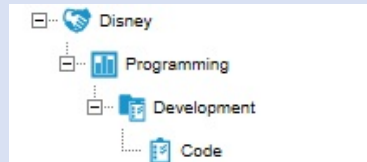
To add task assignments to the timesheet grid:

1. Click the **Assignments** tab .

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**



- 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 yellow.

Notes:

- The **assignments checked** are only added to the timesheet grid currently displayed.
- **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 you can add to your weekly timesheet grid (and Favorites). By default, this limit is 200 task assignments.
- 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 296) 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**.
- 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).
- You can expand or collapse a project's task assignments in the time entry grid by clicking the +/- graphic at the beginning of the Client-Project name.
- You can navigate within the time entry grid using the arrow keys on your keyboard.

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.

▼ ACME - Development	
Code	<input type="checkbox"/>
Data Analysis and Reporting	<input type="checkbox"/>
Design	<input type="checkbox"/>
Meeting	<input checked="" type="checkbox"/>
Quality Control	<input type="checkbox"/>

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: You can also use your keyboard's Delete key to remove rows.

Entering time in Bulk

The following describes how to enter a duration (**Bulk**) for a task and also describes how to enter unique details for the time entry. Time entry can also be accomplished by (1) Tracking time while you work (**Timer**), or (2) Entering time using Start/End times (**In/Out**).

Prerequisite:

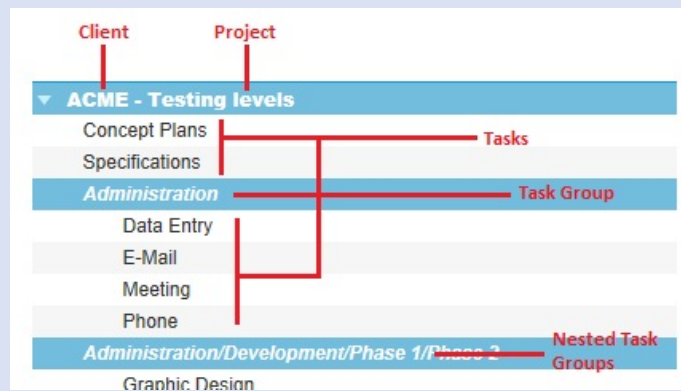
- Before you can enter time on a task assignment, that task must be **added to the timesheet grid** (page 279).



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** 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 the software, 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.

October 05 - October 11 2014		Sun	Mon	Tue	Wed	Thu	Fri	Sat
ACME - Development								
Data Analysis and Reporting								
Design								
Meeting								
BMW - Crash Test Dummies								
Research								
Specifications					2.5			
Testing								

Example: 2.5 hours entered against the Crash Test Dummies' Specifications task for Wednesday, October 8th.

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 date and 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 288).

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). An administrator can make this a required field. If not a required field, then the default description entered is a copy of the task's description.

Overtime Rate: This drop-down list displays the available Company Overtime Rates that you can apply 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 you can apply to this time entry if the task is billable.

Custom Fields: Custom data fields created by your manager or 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.



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 **saved** automatically whenever you switch cells, change views/tabs, etc. Data is not saved if you log out or close 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.
- If enabled, you can modify date and time formats using the Options tab's Regional settings.
- The **maximum number of hours** you can enter for any day is 23.98 hours (23:59).
- Time entries that have been **Submitted**  or **Approved**  cannot be edited.
- If Time Lockout has been enabled, you are prevented from entering or editing time for those days that are locked. You may request that the period be opened (Exception Request, page [298](#)).

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 294). 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 279).

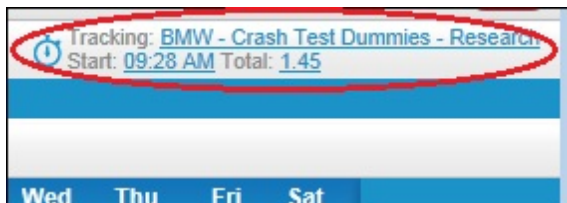
To track time while working:

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 the software, 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.

ACME - Development	
Code	<input type="checkbox"/>
Data Analysis and Reporting	<input type="checkbox"/>
Design	<input type="checkbox"/>
Meeting	<input checked="" type="checkbox"/>
Quality Control	<input type="checkbox"/>

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 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 288).

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). An administrator can make this a required field. If not a required field, then the default description entered is a copy of the task's description - as entered by your manager.

Overtime Rate: This drop-down list displays the available Company Overtime Rates that you can apply 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 you can apply to this time entry if the task is billable.

Custom Fields: Custom data fields created by your manager or 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 **saved** automatically whenever you switch cells, change views/tabs, etc. Data is not saved if you log out or close the browser while adding or editing data in a field.
- The Timer function can only track time **on the current day**.
- If enabled, you can modify date and time formats using the Options tab's Regional settings.
- The **maximum number of hours** you can enter for any day is 23.98 hours (23:59).
- Time entries that have been **Submitted**  or **Approved**  cannot be edited.
- If Time Lockout has been enabled, you are prevented from entering or editing time for those days that are locked. You may request that the period be opened (Exception Request, page 298).

Tips:

- While timing on a task, you can edit other time entries or move to different views within the software.
- 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 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.

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 294)
- Before you can enter time on a task assignment, that task must be **added to the timesheet grid**. (page 279)

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 the software, 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 can be configured to either the 12 hour AM/PM or 24 hour formats (see page 294). 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  is 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  is 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 is configured using the **Options** tab. The following describes the default fields. For a detailed description of all available fields, see **Time Entry details** (page 288).

Duration: This field displays the duration as calculated using 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). An administrator can make this a required field. If not a required field, then the default description entered is a copy of the task's description.

Overtime Rate: This drop-down list displays the available Company Overtime Rates that you can apply 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 you can apply to this time entry if the task is billable.

Custom Fields: Custom data fields created by your manager or 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.

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 **saved** automatically whenever you switch cells, change views/tabs, etc. Data is not saved if you log out or close the browser while adding or editing data in a field.
- The **maximum number of hours** you can enter for any day is 23.98 hours (23:59)
- Time entries that have been **Submitted**  or **Approved**  cannot be edited.
- If Time Lockout has been enabled, you are prevented from entering or editing time for those days that are locked. You may request that the period be opened (Exception Request, page 298).

Time Entry Details



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.

11/13/2014 - ACME - Development - Design

Track Your Time

* Start: 08:00 AM  * End: 09:45 AM  * Duration: 1.75

Project Description: ACME Development Project

Task Description: Description entered for this task (by manager)

Time Entry Description: Description as entered by the employee

Billing

Overtime Rate: [None]

Are you billing a Client for this time? (Billable):

Client Overtime Rate: [None]

Task Progress

Start:	Monday, November 10, 2014
Finish:	Friday, November 21, 2014
Budget - Actual:	55.00 - 11.00 = 44.00
Estimate To Complete (ETC):	40.00


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 you clicked the Start button.


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 you clicked the Stop button.

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 time formats are set from the Options tab.

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: A description field available to enter details relating to the time entry (up to 4000 characters). An administrator can make this a required field. If not a required field, then the default description entered is a copy of the task's description - as entered by your manager.

Custom Fields

Custom Fields can be created by your manager or 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.

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 areas of the software while the Actual hours is the sum of 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 designated as a 'global' task by an administrator, 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 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 administrator, you must submit your time entries for review, approval, etc.

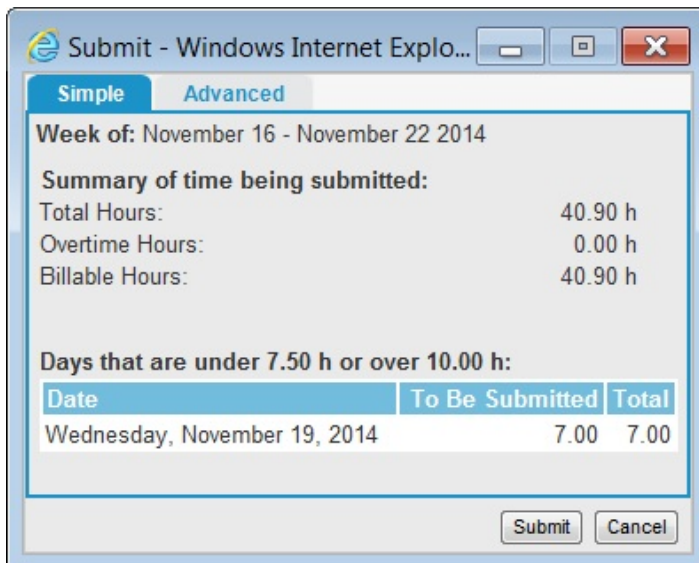
The following describes how to submit time entries for (1) an entire week or for (2) a specific period, and explains the status of time entries after they have been submitted.

Notes:

- 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.
- If Time Lockout has been enabled, you are prevented from submitting time for those days that are locked. You may request that the period be opened (Exception Request, page 298).

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 the **Options** tab.


Notes:

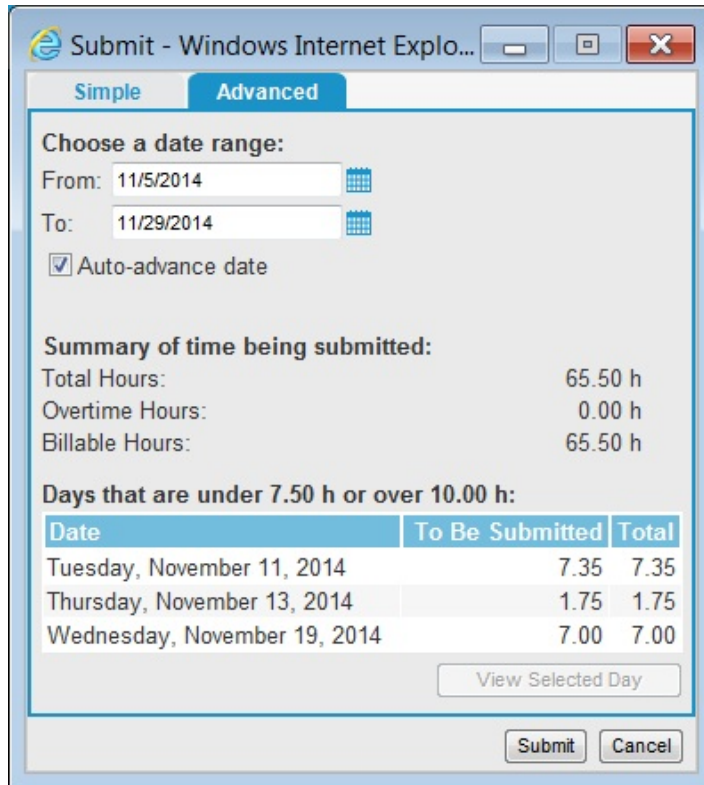
- The Total displayed in the 'Days that are under' summary is the sum of the time to be submitted plus any time previously submitted for that day.
- Summary Overtime and Billable hours may not be displayed if these **options** are hidden in the time entry screen.

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.




Submit - Windows Internet Explo...

Simple Advanced

Choose a date range:

From: 11/5/2014 

To: 11/29/2014 

Auto-advance date

Summary of time being submitted:

Total Hours: 65.50 h

Overtime Hours: 0.00 h


Billable Hours: 65.50 h

Days that are under 7.50 h or over 10.00 h:

Date	To Be Submitted	Total
Tuesday, November 11, 2014	7.35	7.35
Thursday, November 13, 2014	1.75	1.75
Wednesday, November 19, 2014	7.00	7.00

View Selected Day

Submit Cancel

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 the **Options** tab.

To view or edit time entries for a specific day, select the day and click the **View Selected Day** button.


6. Select the **Auto-advance date** checkbox to have the From and To dates automatically advance with time. When unchecked, 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 green dot  next to the time entry and **cannot be edited**.

Entries Submitted (Under Review) display a yellow dot  and cannot be edited.



Rejected entries display a red exclamation mark .

Tip: You can review the approval paths for submitted time or expenses along with the status of any sheet waiting for approval by clicking the **Show Approval Paths** button  on the toolbar. Note that this function will not be available if disabled by your administrator.



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 exclamation mark  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 exclamation mark .

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.

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 This entry has been Rejected, the reason:
This time entry was entered for a Saturday. It should have been Thursday or Friday.

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** button on the toolbar to begin the **submitting process**.

Note: Time entries that have been **Submitted**  or **Approved**  cannot be edited.

Review approval paths and status of submitted sheet


You can review the approval paths for submitted time along with the status of any sheet waiting for approval. Note that this feature will not be available if disabled by your administrator.

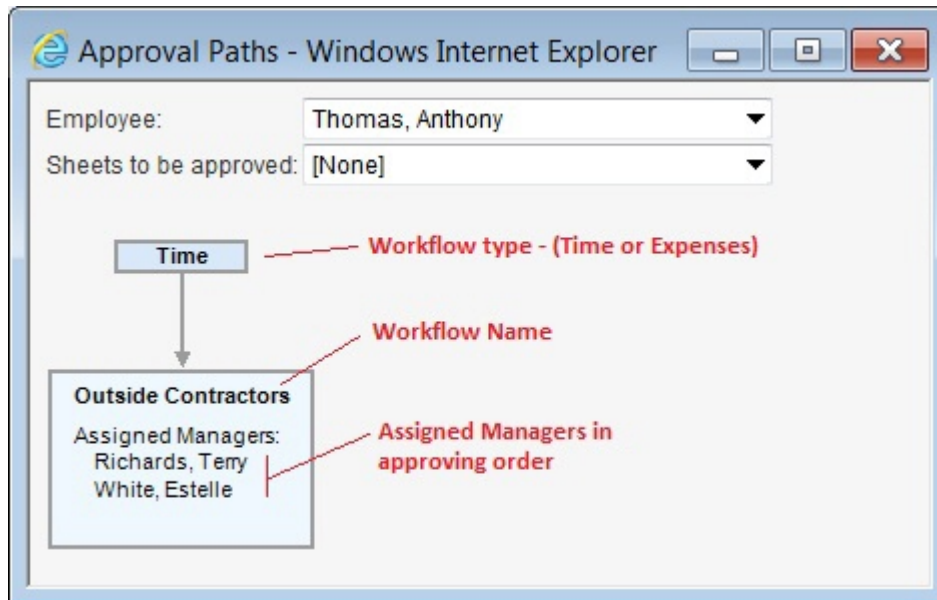
To review approval paths or submitted sheet status:

1. Click the **Show Approval Paths** button  on the toolbar.

The Show Approval Paths window opens.

Approval paths for time are displayed with approving managers listed for each workflow. To view the status of a specific submitted sheet, select the sheet from the **Sheets to be approved** drop-down list. Sheets already approved are not displayed in this list.

- A dashed line  is used display the flow when entries designated for a project specific workflow are also directed to a sheet-based workflow (All Projects).
- When a specific sheet is selected from the drop-down list, the active workflow is highlighted in yellow and an arrow is placed next to the manager who must next approve the sheet.



Time Entry Options

The Time Entry **Options** tab permits you 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 your administrator or manager has chosen to hide some options or chosen to prevent you from modifying options.

To modify time entry options:

1. Click the **Options** tab at the top of the screen.
2. Review and modify options as required.
3. Click **Apply**.

CHANGE PASSWORD

- Use these 3 fields to change your login password. If 'Strong Password' has been enabled by your administrator, your password is required to contain at least 8 characters, contain at least 3 of the following character types - uppercase letter, lowercase letter, number or special character, and cannot contain your User Name. The Password field is disabled when you are linked to Active Directory.

TIMESHEET DETAILS

- Show **Start/End** times: Show/hide the Start and End times in the 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. The task description is used as the default entry for the 'Time Entry Description' field, and can be modified for each time entry.
- 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.

11/13/2014 - ACME - Development - Design	
Track Your Time	
* Start: 08:00 AM	* End: 09:45 AM * Duration: 1.75
Project Description:	ACME Development Project
Task Description:	Description entered for this task (by manager)
Time Entry Description:	Description as entered by the employee
Task Progress	
Start:	Monday, November 10, 2014
Finish:	Friday, November 21, 2014
Budget - Actual:	55.00 - 11.00 = 44.00
Estimate To Complete (ETC):	40.00
Billing	
Overtime Rate:	[None]
<input checked="" type="checkbox"/> Are you billing a Client for this time? (Billable):	
Client Overtime Rate:	[None]

NOTIFICATIONS

- **Email address:** Used to change your email address for login. This field is not displayed if the user account is linked to Active Directory or Microsoft Project.

SETTINGS

- **Time Format:** Set the time entry format for the Start and End time fields in the details area. This option is only available if the Show Start/End times option (above) is set to 'Yes'.
- **Regional setting:** Select the regional setting for date, number and currency formats. This option is only available if Currencies have been enabled. You may need to logout and log back in to see the regional setting changes applied throughout the software.
- **Paper Size:** Sets the default paper size for reporting.
- **My week starts on:** Select the default day of the week that 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. It is also used to set the start time when the day's first time entry 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 do not comply with the limits.

APPS

- **Data access token for Apps:** If API Access is enabled by your administrator, this token may be required to access your information through a 3rd party application or widget. Copy and paste this access token in the application or widget. Resetting the token will generate a new token and de-authorize the previous one. If you are using the current access token and you reset it, you will need to copy and paste the new token in any 3rd party tool or widget you are actively using.

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.

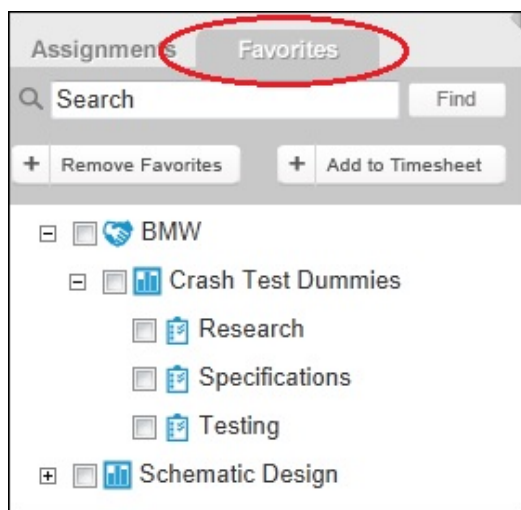
The following describes how to (1) add assignments to your favorites, how to (2) manually add your favorite assignments to the timesheet grid and how to (3) remove assignments from your favorites.

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 have all your favorites added to the timesheet grid automatically.

4. (**Optional**) Click the **Favorites** tab to review the favorites.



Notes:

- There is a limit to the number of task assignments that you can add to your Favorites (and to your weekly timesheet grid). By default, this limit is 200 task assignments.
- 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 yellow.

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.

		April	▼	2014	▼		
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
30	31	1	2	3	4	5	
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30	1	2	3	
Today: 4/23/2014							

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, 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, check 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** used for the time entry tool can be configured to either the 24 hour clock format (e.g. 13:30) or the 12 hour AM/PM format.

The **Duration field** 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.

The **date** and **currency** formats are based on the regional settings.

If Currencies are enabled, these are set for each user at the regional setting option (page 294). If not enabled, the regional setting is based on a setting configured by your IT administrator.

ETC

The **ETC** column (Estimate to Complete) displayed at the far right of the timesheet grid is an optional column you can use to enter how many **hours** you **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.

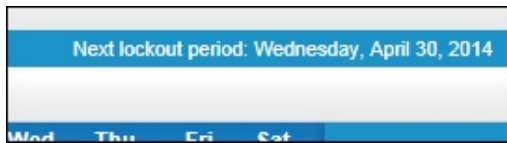
Notes:

- The ETC column can be hidden using the **Options** tab.
- ETCs can be adjusted by managers using the Budgeted Time & Costs view.
- 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.

Lockout Exception request to enter/submit time

An administrative feature called Time Lockout permits all time entries and submissions to be locked down after a specified date. After that date arrives, no additional time entry or time entry submissions are permitted on or prior to the date.


When Time Lockout is enabled, a message is displayed in the upper right hand corner of the time entry view. Lockouts do not apply to expenses.



If required, you can submit a request that the locked period be opened (Exception Request). If the Exception Request is approved, you are then able to enter and submit time for this period.

The Exception Request feature is only available if Time Lockout has been enabled by an Administrator.

Lockout exception request to enter/submit time:

1. Click the **Exception Request** button  on the time entry toolbar.
The Exception Request window opens.
2. Select to which **Manager** to send the exception request. This list displays all administrative users who have the ability to approve the request.
3. Enter the **date range** (Start/Finish) to open.
4. Enter a **Reason** for the request.
5. Click **Submit**.

An e-mail is sent to the manager. When the exception request is approved, the user who submitted the request is notified by e-mail.

Right Click

Right Click functions are available in the assignment tree and timesheet grid areas of the time entry screen giving you 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.

Show All

An administrative feature permits a manager or administrator to hide a task assignment from you when the date is outside the task's scheduled start and finish dates.

This option does not prevent you 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.

If required, you 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 or not 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.

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 you to view your other expense sheets.

2 The **Expense Entry Grid** area is where you enter your individual expenses and their details.










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, rejected and approved expense sheets.

The screenshot shows the 'My Time & Expenses / Expenses' interface. At the top, there are tabs for 'Timesheet', 'Expenses', 'Reports', and 'Options'. Below the tabs is a toolbar with buttons for 'New Sheet', 'Submit', and other actions. A callout '3' points to this toolbar. Below the toolbar, there are tabs for 'Active Sheets (1)', 'Rejected Sheets (0)', and 'Submitted/Approved (Owe: USD \$250.78)'. Under the 'Active Sheets' tab, there is a form for 'Active sheets:' with fields for 'Sheet name' (Training) and 'Project' (XYZ-Programming). A callout '1' points to this form. To the right of the form, there are summary statistics: 'Reimbursable total: USD \$603.19' and 'Sheet total: USD \$724.19'. Below the form is a table with columns: Date, Expense Category, Quantity, Amount, Converted Amount, Reimburs..., Billable, and Description. A callout '2' points to the 'Quantity' column. The table contains several rows of expense data.

* Date	Expense Category	Quantity	Amount	Converted Amount	Reimburs...	Billable	Description
10/20/2014	Administration		USD \$121.00	USD \$121.00	No	Yes	
11/3/2014	Meals		GBP £27.20	USD \$45.73	Yes	Yes	
11/3/2014	Transportation		EUR €22.00	USD \$30.44	Yes	Yes	Taxi
11/5/2014	Accommodations		JPY ¥31,700.00	USD \$310.34	Yes	Yes	2 nights
11/8/2014	[None]		EUR €123.38	USD \$170.70	Yes	Yes	
11/17/2014	Mileage (USD \$0.38 per mile)	121.00	USD \$45.98	USD \$45.98	Yes	Yes	Personal Vehicle

Expense Entry Toolbar

 New Sheet	Create a new sheet: To create a new expense sheet.
 Submit	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.
	View approval paths: To review approval paths for submitted time and expenses.
	Help: To launch the Help system.
	About: To display information on the software version.

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 reimbursement, project cost reporting, analysis and billing.

In the expense entry screen, expenses are organized by sheets. Each expense must belong to a sheet and each sheet must be associated to a project.

See page 305 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**:

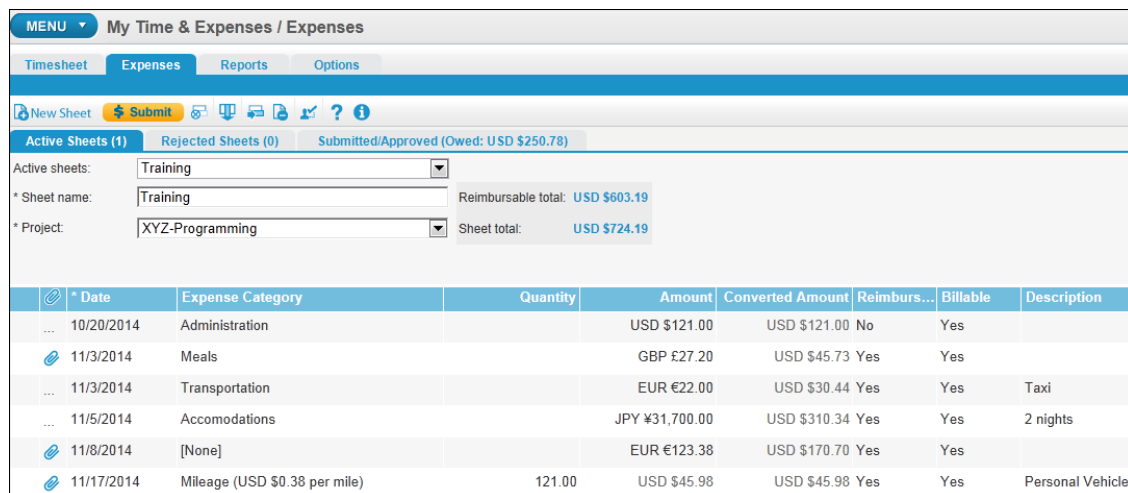
- 3a. Select the sheet from the **Active sheets** drop-down list and go to step 4.

If entering an expense for a new expense sheet:

- 3a. Click the **New sheet** button  on the toolbar.
- 3b. Enter a **Sheet name**.




Note: When submitted, your name, the associated project and the date range are automatically added to the sheet name where applicable.

- 3c. Select a **project** for this sheet from the Project drop-down list.




The screenshot shows the 'My Time & Expenses / Expenses' interface. The 'Active Sheets' section is visible, showing a dropdown menu for 'Active sheets' with 'Training' selected. Below it, the 'Sheet name' is 'Training' and the 'Project' is 'XYZ-Programming'. The 'Reimbursable total' is USD \$603.19 and the 'Sheet total' is USD \$724.19. A table of expenses is shown below, with columns for Date, Expense Category, Quantity, Amount, Converted Amount, Reimbursable, Billable, and Description.

* Date	Expense Category	Quantity	Amount	Converted Amount	Reimburs...	Billable	Description
10/20/2014	Administration		USD \$121.00	USD \$121.00	No	Yes	
11/3/2014	Meals		GBP £27.20	USD \$45.73	Yes	Yes	
11/3/2014	Transportation		EUR €22.00	USD \$30.44	Yes	Yes	Taxi
11/5/2014	Accommodations		JPY ¥31,700.00	USD \$310.34	Yes	Yes	2 nights
11/8/2014	[None]		EUR €123.38	USD \$170.70	Yes	Yes	
11/17/2014	Mileage (USD \$0.38 per mile)	121.00	USD \$45.98	USD \$45.98	Yes	Yes	Personal Vehicle

3. Click in the empty row (the row with the asterisk  at the far left).
4. (**Optional**) Click the ... icon in the Attachment column  to attach a file to this expense. Most image file types can be uploaded, but some restrictions are enforced for security reasons. The maximum file size is 4MB. Once attached, you can click on the icon again to view, delete or re-attach the file. Holding your mouse over the icon displays the attached file's name.
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. If available, select the **currency** used to pay for the expense. The exchange rate used to calculate the Adjusted Amount is determined by your administrator. The currency used for the Reimbursable and Sheet Totals is also determined by your administrator.
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 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. Select a currency for this amount when applicable.
- Enter **Value Added Tax 1** and **Value Added Tax 2** information for your location if required. The currency applied to the Tax fields is linked to the currency selected when entering the Amount value and cannot be modified.
- **Client Cost**: A non-editable field showing the client cost for the expense: (Amount x Markup %) + Fixed Amount. The currency used for client costs is determined by the project's properties.

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:

- **Expense attachment:** To view an attached file, the software required to open the file format must exist on your computer (PDF reader, Excel, etc.).
- The **Quantity** field is only available when a rate-based expense category is selected.
- The **Reimbursable total** displayed above the grid shows the total for the expense entries that have been checked as reimbursable within the sheet. The Reimbursable total does not include any markup, fixed costs or taxes.
- The **Sheet total** displayed above the grid shows the total for all expense entries within the sheet. The Sheet total does not include any markup, fixed costs or taxes.
- Expense entries having an **amount = 0** are displayed in the expense entry screen. However, 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. If the expense has an attachment, it will also be submitted if the amount = 0.
- The Project drop-down list includes only those **projects** to which you are assigned.
- Certain custom fields may be disabled depending on the expense category selected.
- The **date** and **currency formats** are based on the regional settings, either in Options tab if available, or set by your administrator.

Tips:

- An unsubmitted or rejected 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:

- Specific rate-based Expense Categories must first be created by a manager or administrator 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. Enter a **Sheet name**. When submitted, your name, the associated project and the date range are automatically added to the Sheet name where applicable.
 - 3c. Select a **project** for this sheet from the Project drop-down list.
3. Click in the empty row (the row with the asterisk  at the far left).
 4. (**Optional**) Click the ... icon in the Attachment column  to attach a file to this expense. Most image file types can be uploaded, but some restrictions are enforced for security reasons. The maximum file size is 4MB. Once attached, you can click on the icon again to view, delete or re-attach the file. Holding your mouse over the icon displays the attached file's name.
 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: Mileage (\$0.45 per mile).
 7. Enter the number of units in the **Quantity** field. The Amount is automatically calculated. If enabled, the Amount is shown in the Expense Category's currency while the Adjusted Amount displays the converted amount in your reimbursement currency. The currencies used for the Expense Category and your Reimbursement Totals are determined by your administrator.
 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 administrator, you must submit your expense entries for approval. Once submitted (and approved), expenses are saved in the database and are available for reimbursement project cost reporting, analysis and billing.

The following describes how to submit expense sheets and how to review the status of a submitted expense sheet.

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 submitted sheet is placed in the Submitted/Approved tab.

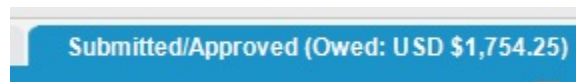
Notes:


- Sheets must be **submitted as a whole**. Individual expenses from within a sheet cannot be submitted.
- When expense sheets are submitted, your name and date range are automatically added to the sheet name. Expense sheet date ranges are based upon the minimum and maximum expense entry dates within each sheet.

To review the status of a submitted expense sheet:

The **Submitted/Approved** tab is where all submitted expense sheets are located.

- The **Sheet Status** column displays whether the sheet is Approved, Under Review or if it has been categorized as reimbursed within the Administrative views.
- Clicking on an expense sheet displays that sheet's individual entries in the lower pane.
- The **Owed** amount displayed on the tab's label represents the Reimbursable total for all expense sheets that you have not checked as 'Received Payment' in the left most column. The Received Payment checkbox is a personal marker and its status is not transferred to the Administrative views.




Tip: You can review the approval paths for submitted time or expenses along with the status of any sheet waiting for approval by clicking the **Show Approval Paths** button  on the toolbar. Note that this function will not be available if disabled by your administrator.

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, and how to edit and re-submit those rejected expense entries.

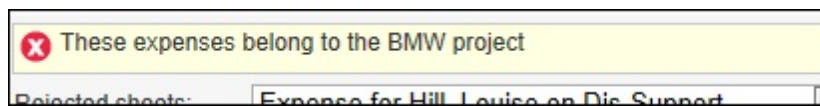
To determine if you have rejected expense entries:


An exclamation icon  is displayed within the **Expenses tab** whenever one or more expense sheets have been rejected.

To edit a rejected expense:

1. Click the **Rejected Sheets** tab near the top of the screen.
2. 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.



3. **Edit** the expense entries as required:
 - **Modify** the data in one or more columns.
 - **Move an entire row** to a different sheet by selecting the row and clicking the **Move expense** button .

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

 **Submit** 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.

Review approval paths and status of submitted sheet

You can review the approval paths for submitted expenses along with the status of any sheet waiting for approval. Note that this feature will not be available if disabled by your administrator.

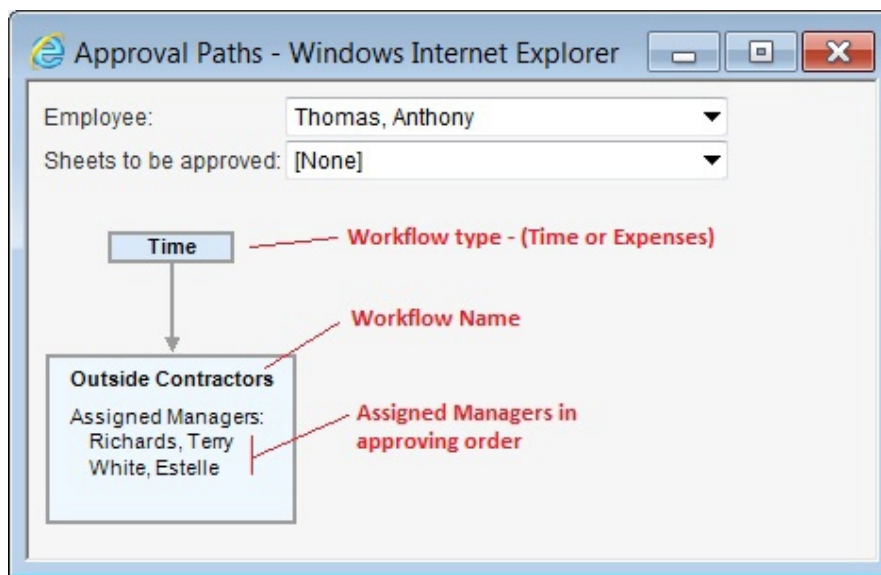
To review approval paths or submitted sheet status:

1. Click the **Show Approval Paths** button  on the toolbar.

The Approval Paths window opens.

Approval paths for expenses are displayed with approving managers listed for each workflow. To view the status of a specific submitted sheet, select the sheet from the **Sheets to be approved** drop-down list. Sheets already approved are not displayed in this list.

- When a specific sheet is selected from the drop-down list, the active workflow is highlighted in yellow and an arrow is placed next to the manager who must next approve the sheet.




Other functions


Show/Hide Expense Columns

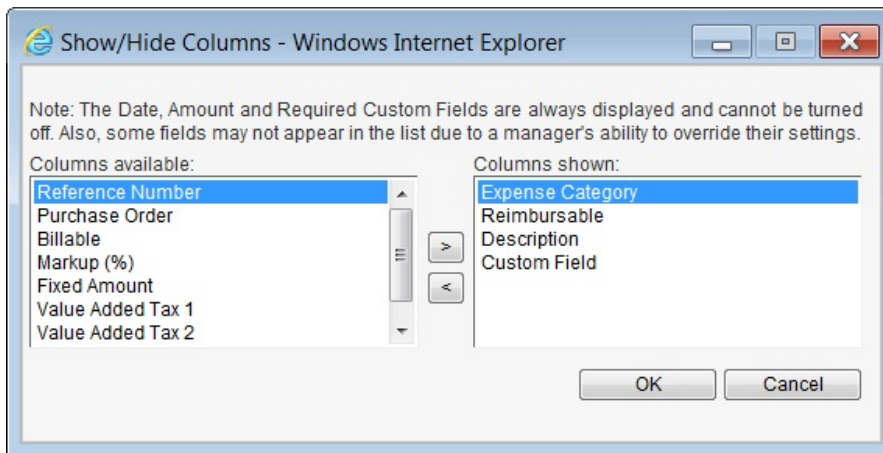
The Show/Hide columns function allows you to personalize the expense entry view by showing or hiding specific columns in the expense entry grid.

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 .
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 your manager or 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**.

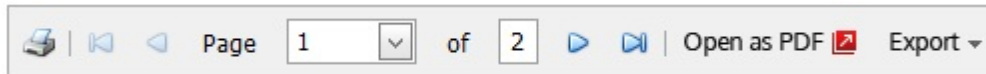
Time & Expense Entry Reporting

The **Reports** tab is used to display or print your time and expense reports.

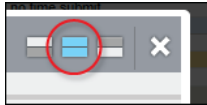
To view a report:

1. Click the **Reports** tab located at the top of the screen.
2. Click on the **report name** and then click the **Preview report** button .
3. If prompted, select the **projects, dates**, etc., from the filters presented and then click the **Run Report** button. .

Use the available controls to print, page through, open as PDF or export/save the report (described next).



You can return to the **Filters** at any time by clicking on the 'Split view' button in the upper right corner of the screen.



To export (save) a report:

1. With the report showing in the Preview area, click the **Export** drop-down list near the top of the preview window.
2. Select in which **format** to save the report.
3. Depending on which web browser you are using, you are prompted with Download/Open, Save or Save As options. Select one to complete the export/save process.

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