

Web TimeSheet User Guide

Version 5.7

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Contact Information

Replicon, Inc.
830, 910 - 7th Ave. S.W.
Calgary, Canada T2P 3N8

Direct:
1-403-262-6519

Toll Free in North America:
1-877-737-5420

Toll Free in Europe:
00-800-7375-4266

Toll Free in Australasia:
011-800-7375-4266

Fax:
1-403-233-8046

<http://www.replicon.com>

info@replicon.com

The international toll free numbers may not work in some countries. If you experience problems, use the direct line to contact Replicon.



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Chapter 1 - Overview

What is Web TimeSheet?

Web TimeSheet is a web-based timesheet management application for workgroups.

Unlike traditional PC applications or client-server applications, Web TimeSheet uses your Internet browser to run the application. The only software that is required on the client PC is a standard Javascript enabled web browser. The application is installed and runs on your web server. Absolutely no programming nor HTML scripting is required.

Web TimeSheet supports web servers running on Windows 95/98/2000/2003/XP, Windows ME, or Windows NT 4.0, and can run through Netscape and Microsoft Internet Explorer.

Web TimeSheet automatically consolidates individual timesheets by project, client, etc. Because the application is based on Internet technology, workgroup members can fill in their timesheets from anywhere using any platform. Web TimeSheet captures the information on your web server.

Using This Manual

This manual is an overview of Web TimeSheet and is designed to help you understand the features of the product. The chapters of this manual contain the following information:

Chapter 1 – Overview

Introduction to Web TimeSheet and instructions for accessing the application and removing sample data (Access version).

Chapter 2 – How to Get Help

Instructions for using the online Help system and contacting Replicon's support team.

Chapter 3 – Quick Tour

Introduction to the standard terms and important concepts used in Web TimeSheet and a description of the workflow and setup process.

Chapter 4 – Getting Started

Instructions for setting up the basic features required to implement Web TimeSheet including users, time off, projects, and rates.

Chapter 5 – Additional Setup Options

Instructions for setting up advanced features.

Chapter 6 – Daily Operation

Information and instructions for using timesheets, expenses, and approvals.

Chapter 7 – User Configuration

Instructions for the individual user to configure the look and feel of Web TimeSheet, change his/her e-mail address and password, or set up substitute users.

Chapter 8 – Reports

Introduction to the Web TimeSheet reporting features and a detailed look at the individual reports.

Chapter 9 – Historical Timesheets and Expenses

Instructions for setting up security and system-wide configuration including the look/feel and approval process.

Chapter 10 – System Security

Instructions for setting up security.

Chapter 11 – System Configuration

Instructions for configuring the look/feel and behavior of the system.

Chapter 12 – Integration

Information about Web TimeSheet Integration Managers, instructions for setting up integration connections, and information about installing external integration managers.

Accessing Web TimeSheet

You can access Web TimeSheet locally from your Start menu, desktop or web browser, remotely from any computer with Internet access, or from within the ProMax module. You must have Internet access to run Web TimeSheet.

Note ...

During installation you can specify the location and folder for Web TimeSheet in your Start menu.

If you customized your installation and specified a different Start Menu location, refer to that location when accessing Web TimeSheet from the Start Menu.

You will need to enter a port number only if your web server uses a port other than port 80.

Start Menu

The Web TimeSheet menu is located under **Programs** in your Start menu:

1. Select *Web TimeSheet* from the **Programs** menu.
2. Select *Launch Web TimeSheet*.

Web Browser

To run Web TimeSheet from your web browser:

1. Open your browser application and enter the URL for Web TimeSheet in the web address field. The URL is in the format `http://servername[:port#]/cgi/rtcgi.exe` (using IIS) or `http://servername[:port#]` (using Internal WebServer).
2. The Web TimeSheet login screen is displayed. Enter your user name and password and click on the Enter button.

Desktop

To run Web TimeSheet from your desktop, double-click on the *Launch Web TimeSheet* icon.

Remote Access

To access Web TimeSheet from a remote computer, follow the procedure for your local web browser. The computer must have Internet access and TCP/IP network access to your organization's web server.

If you cannot access Web TimeSheet remotely, try again. Heavy traffic on the Internet may cause a connection time-out. If after additional attempts you are still unable to connect, make sure your server name is a fully qualified domain name and that it is registered with DNS. If your problems persist, contact your Internet Service Provider.

ProMax

To access Web TimeSheet from ProMax, click on the **Timesheet** button at the top of the **ProMax** screen. ProMax is available only if your Web TimeSheet license includes the ProMax module.



Removing the Sample Database






You can remove the sample data from the Access installation of Web TimeSheet quickly and easily either by reinstalling Web TimeSheet without a sample database (refer to the Web TimeSheet Installation manual for installation instructions), or by following the steps below. Be aware that if you change the database in any way (add your own information), the following procedures may not work properly.





Time and Billing Database




If you installed the time and billing sample database, follow the instructions below to remove the sample data. Note that you must have a valid Expense license (Demo or other) to remove the Time and Billing sample database.

1. Log into Web TimeSheet as the administrator.
2. If you have a valid license for ProMax (Demo or other), follow the steps below:
 - a. Click on the **ProMax** button at the top of the screen to go to the ProMax module.
 - b. Click on the **Setup** button from within ProMax and select **User Productivity**. Enter "0" in the Total field for the all users. Click the Save button.
 - c. Click on the **Timesheet** button at the top of the screen to return to Web TimeSheet.
3. Click on the **Admin** button at the top of the screen and select **Historical Timesheets** from the side menu.
4. Make sure <All> is selected for all drop-down filters at the top of the screen and click the Apply button. Select all timesheets (use the Select All check box at the bottom of the list) and click on the Delete button. Select Yes to confirm the deletion. Repeat this step until all timesheets have been removed.
5. If you have a valid license key for the Expense module, select **Historical Expenses** from the side menu. Make sure <All> is selected for all drop-down filters at the top of the screen (entry fields should be blank) and click the Apply button. Select all expenses (use the Select All check

- box at the bottom of the list) and click the Delete button. Select Yes to confirm the deletion. Repeat this step until all expenses have been removed.
6. Click on **SETUP** in the side menu to view a list of advanced setup options and select **Approver Types**. Click the  next to the Expense Approver. On the **Edit Approver Type** screen, change the Approver to "Supervisor". Click the Save button to save the change.
 7. Select **User Defined Fields** from the side menu and select the Timesheet tab. Under the Task Row Level heading click the corresponding  to delete the Location and ETC (Hrs) fields. Select Yes to confirm the deletion.



Now select the Projects/Tasks tab and click the corresponding  to delete the Phase field.
 8. If you have a valid license key for the User Grouping module, select **User Groups** from the side menu. Click on the corresponding  to delete each user group.
 9. Click on the **Journals** button at the top of the screen. The **List Notes by Project** screen is displayed. Click the List Project Notes button and expand each project by selecting the corresponding +. Click the corresponding  to delete each project note.
 10. Click on the **Projects** button at the top of the screen. The **List Projects** screen is displayed. Make sure <All> (or <Both>, where applicable) is selected for all filters at the top of the screen and click the Apply button. Select all projects (use the Select All check box at the bottom of the list) and click on the Delete button. Select Yes to confirm the deletion.
 11. Select **Clients** from the side menu. Click on the corresponding  to delete each client. Select Yes to confirm each deletion.
 12. Select **Roles** from the side menu. Select all roles (use the Select All check box at the bottom of the list) and click on the Delete button. Select Yes to confirm the deletion.
 13. Click on the **Admin** button at the top of the screen. The **User Information** screen is displayed. Make sure <All> (or <Both>, where applicable) is selected for the drop-down filters at the top of the screen and click the Apply button. Click on the  next to the admin user (Doug Brown).







14. Make the following changes on the **Edit User** screen:
 - Personal Information and Login
 - a. Change the last name and login name to **admin**.
 - b. Delete the information in the First Name, Employee ID, and E-mail fields.
 - c. Change Supervisor to **<None>**. When prompted, select Replace Existing Supervisor and click on the OK button.
 - Access Rights
 - a. Remove all access rights EXCEPT **Administrator**
 - Advanced
 - a. Select "None" for the Department or Client field.
 - b. Delete the information in the Start Date field.
 - c. Click the  next to the Hourly Cost field. On the Hourly Cost History screen, delete all hourly cost values by clicking the corresponding . For the initial hourly cost, click the  and set the value to \$0.00.
 - d. Select "Supervisor" for the Expense Approval Path field.
 - e. Set the Holiday Calendar field to "<None>".
 - Seat Assignments
 - a. Deselect all check boxes.
 - Time Off
 - a. Click on the Edit button in the top right corner of the frame.
 - b. Scroll down to the Vacation time off code and delete the days allowed and the as of date.
 - c. Change Reset to "No Reset".
 - d. Click on the Save button.
15. Click the Save button on the **Edit User** screen to save all your changes.
16. On the **User Information** screen, select all users EXCEPT Rob Jones and click the Delete button. Select Yes to confirm the deletion.
17. Now delete Rob Jones by clicking on the corresponding . You should now have only one user (admin - the administrator).



18. Select **Departments** from the side menu. Click the corresponding  to delete each department. Select Yes to confirm each deletion.
 19. Click on the **Reports** button at the top of the screen. Select the **Hours by Location** report under the **Timesheet** heading in the side menu. Click the Delete button from within the report, and select Yes to confirm the deletion.
 20. Log out of Web TimeSheet using the Logout link at the top of the screen. Log back into Web TimeSheet as the administrator. The sample data will be gone.
6. Click on the **Journals** button at the top of the screen. The **List Notes by Project** screen is displayed. Click the List Project Notes button and expand each project by selecting the corresponding +. Click the corresponding  to delete each project note.
 7. Click on the **Projects** button at the top of the screen. The **List Projects** screen is displayed. Make sure <All> is selected for all drop-down filters at the top of the screen and click the Apply button. Select all projects (use the Select All check box at the bottom of the list) and click on the Delete button. Select Yes to confirm the deletion.
 8. Select **Clients** from the side menu. Click on the corresponding  to delete each client. Select Yes to confirm each deletion.

DCAA Enabled Database

If you installed the DCAA enabled sample database, follow the instructions below to remove the sample data:

1. Log into Web TimeSheet as the administrator.
 2. Click on the **Admin** button at the top of the screen and select **PREFERENCES** from the side menu to display a list of options. Click on **System Preferences** and select the **DCAA Compliance** tab. Deselect the "Enable DCAA compliance" check box and click the Save button.
 3. Now select **Historical Timesheets** from the side menu. Make sure <All> is selected for all drop-down filters at the top of the screen and click the Apply button. Select all timesheets (use the Select All check box at the bottom of the list) and click on the Delete button. Select Yes to confirm the deletion. Repeat this step until all timesheets have been removed.
 4. If you have a valid license key for the User Grouping module, click on **SETUP** in the side menu and select **User Groups**. Click on the corresponding  to delete each user group.
 5. Select **User Defined Fields** from the side menu and click on the Timesheet tab. Under the Task Row Level heading click the corresponding  to delete the Location and ETC (Hrs) fields. Select Yes to confirm the deletion.







Now select the Projects/Tasks tab and click the corresponding  to delete the Phase field.
8. Select **Clients** from the side menu. Click on the corresponding  to delete each client. Select Yes to confirm each deletion.
 9. Click on the **Admin** button at the top of the screen. The **User Information** screen is displayed. Make sure <All> (or <Both>, where applicable) is selected for all the drop-down filters at the top of the screen. Click on the  next to the admin user (Doug Brown).
 10. Make the following changes on the **Edit User** screen:
 - Personal Information and Login
 - a. Change the last name and login name to **admin**.
 - b. Delete the information in the First Name, Employee ID, and E-mail fields.
 - c. Change Supervisor to **<None>**. When prompted, select Replace Existing Supervisor and click on the OK button.
 - Access Rights
 - a. Remove all access rights EXCEPT **Administrator**
 - Advanced
 - a. Select "None" for the Department or Client field.
 - b. Delete the information in the Start Date field.
 - c. Click the  next to the Hourly Cost field. On the Hourly Cost History screen, delete all hourly cost values by clicking the corresponding . For the initial hourly cost, click the  and set the value to \$0.00.






- Time Off
 - a. Click on the Edit button in the top right corner of the frame.
 - b. Scroll down to the Vacation time off code and delete the days allowed and the as of date.
 - c. Change Reset to "No Reset".
 - d. Click on the Save button.
- 11. Click the Save button on the **Edit User** screen to save all your changes.
- 12. On the **User Information** screen, select all users EXCEPT Rob Jones and click the Delete button. Select Yes to confirm the deletion.
- 13. Now delete Rob Jones by clicking on the corresponding . You should now have only one user (admin - the administrator).
- 14. Select **Departments** from the side menu. Click the corresponding  to delete each department. Select Yes to confirm each deletion.
- 15. Click on the **Reports** button at the top of the screen. Select the **Hours by Location** report under the Timesheet heading in the side menu. Click the Delete button from within the report, and select Yes to confirm the deletion.
- 16. Log out of Web TimeSheet using the **Logout** link at the top of the screen. Log back into Web TimeSheet as the administrator. The sample data will be gone.

Project Costing Database

If you installed the project costing sample database, follow the instructions below to remove the sample data:

1. Log into Web TimeSheet as the administrator.
2. Click on the **Admin** button at the top of the screen and select **Historical Timesheets** from the side menu.
3. Make sure <All> is selected for all the drop-down filters at the top of the screen and click the Apply button. Select all timesheets (use the Select All check box at the bottom of the list) and click on the Delete button. Select Yes to confirm the deletion. Repeat this step until all timesheets have been removed.



4. If you have a valid license key for the User Grouping module, click on **SETUP** in the side menu to view a list of advanced setup options and select **User Groups** from the side menu. Click on the corresponding  to delete each user group.
5. Select **User Defined Fields** from the side menu and click on the Timesheet tab. Under the Task Row Level heading click the corresponding  to delete the Location and ETC (Hrs) fields. Select Yes to confirm the deletion.
Now select the Projects/Tasks tab and click the corresponding  to delete the Phase field.
6. Click on the **Journals** button at the top of the screen. The **List Notes by Project** screen is displayed. Click the List Project Notes button and expand each project by selecting the corresponding +. Click the corresponding  to delete each project note.
7. Click on the **Projects** button at the top of the screen. The **List Projects** screen is displayed. Make sure <All> (or <Both>, where applicable) is selected for all the drop-down filters at the top of the screen and click the Apply button. Select all projects (use the Select All check box at the bottom of the list) and click on the Delete button. Select Yes to confirm the deletion.
8. Select **Clients** from the side menu. Click on the corresponding  to delete each client. Select Yes to confirm each deletion.
9. Click on the **Admin** button at the top of the screen. The **User Information** screen is displayed. Make sure <All> (or <Both>, where applicable) is selected for all drop-down filters at the top of the screen and click the Apply button. Click on the  next to the admin user (Doug Brown).
10. Make the following changes on the **Edit User** screen:
 - Personal Information and Login
 - a. Change the last name and login name to **admin**.
 - b. Delete the information in the First Name, Employee ID, and E-mail fields.
 - c. Change Supervisor to **<None>**. When prompted, select Replace Existing Supervisor and click on the OK button.



- Access Rights
 - a. Remove all access rights EXCEPT **Administrator**
 - Advanced
 - a. Select “None” for the Department or Client field.
 - b. Delete the information in the Start Date field.
 - c. Click the  next to the Hourly Cost field. On the Hourly Cost History screen, delete all hourly cost values by clicking the corresponding . For the initial hourly cost, click the  and set the value to \$0.00.
 - Time Off
 - a. Click on the Edit button in the top right corner of the frame.
 - b. Scroll down to the Vacation time off code and delete the days allowed and the as of date.
 - c. Change Reset to “No Reset”.
 - d. Click on the Save button.
11. Click the Save button on the **Edit User** screen to save all your changes.
 12. On the **User Information** screen, select all users EXCEPT Rob Jones and click the Delete button. Select Yes to confirm the deletion.
 13. Now delete Rob Jones by clicking on the corresponding . You should now have only one user (admin - the administrator).
 14. (*Optional step, depending on your organization’s requirements*) Click on **PREFERENCES** in the side menu and select **System Preferences**. Click on the **General** tab and deselect the option to “Roll up project/task estimates from sub-tasks.” Click the Save button.
 14. Click **SETUP** in the side menu and select **Departments**. Click the corresponding  to delete each department. Select Yes to confirm each deletion.
 15. Click on the **Reports** button at the top of the screen. Select the **Hours by Location** report under the Timesheet heading in the side menu. Click the Delete button from within the report, and select Yes to confirm the deletion.


16. Log out of Web TimeSheet using the **Logout** link at the top of the screen. Log back into Web TimeSheet as the administrator. The sample data will be gone.

Time and Attendance Database

If you installed the time and attendance sample database, follow the instructions below to remove the sample data:

1. Log into Web TimeSheet as the administrator.
2. Click on the **Admin** button at the top of the screen and select **Historical Timesheets** from the side menu.
3. Make sure <All> is selected for all drop-down filters at the top of the screen and click the Apply button. Select all timesheets (use the Select All check box at the bottom of the list) and click on the Delete button. Select Yes to confirm the deletion. Repeat this step until all timesheets have been removed.
4. If you have a valid license key for the User Grouping module, click on **SETUP** in the side menu and select **User Groups**. Click on the corresponding  to delete each user group.
5. Select **User Defined Fields** from the side menu and click on the Timesheet tab. Under the Task Row Level heading click the corresponding  to delete the Shift field. Select Yes to confirm the deletion. Repeat this process for the following user defined fields:
 - Timesheet tab
Task Hours - No. of Calls
 - User tab
Normal Schedule
 - Employee Type tab
Business Rule
6. Click on the **Projects** button at the top of the screen. The **List Projects** screen is displayed. Make sure <All> (or <Both>, where applicable) is selected for the drop-down filters at the top of the screen and click the Apply button. Select all projects (use the Select All check box at the bottom of the list) and click on the Delete button. Select Yes to confirm the deletion.

7. Click on the **Admin** button at the top of the screen. The **User Information** screen is displayed. Make sure <All> (or <Both>, where applicable) is selected for all drop-down filters at the top of the screen. Click on the  next to the admin user (Doug Brown).
8. Make the following changes on the **Edit User** screen:
 - Personal Information and Login
 - a. Change the last name and login name to **admin**.
 - b. Delete the information in the First Name, Employee ID, and E-mail fields.
 - c. Change Supervisor to **<None>**. When prompted, select Replace Existing Supervisor and click on the OK button.
 - Access Rights
 - a. Remove all access rights EXCEPT **Administrator**
 - Advanced
 - a. Select “None” for the Department or Client field.
 - b. Delete the information in the Start Date and Hourly Cost fields.
 - c. Set the Holiday Calendar field to “<None>”.
 - Seat Assignments
 - a. Deselect all check boxes.
 - Time Off
 - a. Click on the Edit button in the top right corner of the frame.
 - b. Scroll down to the Vacation time off code and delete the days allowed and the as of date.
 - c. Change Reset to “No Reset”.
 - d. Click on the Save button.
9. Click the Save button on the **Edit User** screen to save all your changes.
10. On the **User Information** screen, select all users EXCEPT Rob Jones and click the Delete button. Select Yes to confirm the deletion.
11. Now delete Rob Jones by clicking on the corresponding . You should now have only one user (admin - the administrator).

12. Select **Departments** from the side menu. Click the corresponding  to delete each department. Select Yes to confirm each deletion.
13. Click on the **Reports** button at the top of the screen. Select the **Hours by User** report under the Project Status heading in the side menu. Click the Delete button from within the report, and select Yes to confirm the deletion. Repeat this process for the following reports:
 - Project Status
 - Hours by Shift
 - Earning Code Actual
 - Earning Code Assignment
 - Earning Code by Shift
 - Earning Code Summary
 - Administration
 - Users by Shift
 - Raw Data Export
 - Payroll Integration
14. Log out of Web TimeSheet using the **Logout** link at the top of the screen. Log back into Web TimeSheet as the administrator. The sample data will be gone.

Note ...

For information about purchasing a license or adding seats to an existing license, contact sales@replicon.com.

License and System Information

You can view your license and system information by clicking on the **Admin** button at the top of the screen and selecting **About Web TimeSheet** from the side menu.

The screen contains the following tabs:

- System Information
- License Keys
- Seat Assignments (appears only if licenses exist for seat-based modules)

System Information

The System Information tab provides an overall summary of Web TimeSheet license and version information.

Note ...

For information about purchasing a license or adding seats to an existing license, contact sales@replicon.com.

Clicking the Cancel button on any screen will cancel the process without saving your changes.

The information in the top right corner includes:

- Web TimeSheet version number
- Web TimeSheet build number
- Number of users currently logged into the system
- Modules
- Number of Assigned Seats/Number of Licensed Seats.

License Keys

The License Keys tab is used to manage the licenses used by your organization to access Web TimeSheet and add-on modules. From the License Keys tab you can view summary information for your existing license keys, add new license keys, or delete license keys.

The summary information for each license key includes:

- Module
Module is the name of the Web TimeSheet module for which the license key grants access. Each module has a separate license key.
- Licensed Seats
This is the number of seats included in the license. For modules that do not have seat-based licenses, the license key will be for all users.
- License Expiry
The license expiry is the date the license key will expire. You will be notified before a license key expires to allow you plenty of time to obtain a new key. If you allow a license key to expire, the module associated with that license key will be unavailable until you a valid key.
- Build Period
The build period is a period during which you may install new builds against the license key. For example, if you have a Web TimeSheet license key with a build period of January 1 - December 31, the key will be valid for any point or service releases available during that time.
- Type
This is the type of the license key entered. The following are the types of license keys available:

Demo A temporary license provided when Web TimeSheet is initially downloaded from the Replicon web site. A Demo license expires after 14 days.

PO A temporary license provided when an organization issues a purchase order for Web TimeSheet. A PO order expires after 45 days, unless the license is upgraded to a Paid license.

Paid A permanent, fully-paid license

Clicking a module name will display the summary information on a separate screen, complete with the full license key.

Add a New License Key

Any new license keys will be sent to you via e-mail. To ensure each new key is entered correctly, it is recommended that you copy the key from your e-mail and paste it directly into the field provided.


To add a new license key:

1. Click on the **Admin** button at the top of the screen and select **About Web TimeSheet** from the side menu.
2. Select the **License Keys** tab and click the Add button to add a new key.
3. On the **Add New License** screen, paste the new license key in the field provided.
4. Click Add More if you want to add more license keys after this one.
5. When you are finished, click the Save button to save the new license key and return to the **About Web TimeSheet** screen.

Delete a License Key

If you are no longer using a license key (e.g., the key is expired), you can delete the key from the database. Be very careful when deleting license keys; if you delete an active license key, you will lose access to the features associated with the key.

You can delete a single license key or multiple license keys at once. To delete a single license key:

1. Click on the **Admin** button at the top of the screen and select **About Web TimeSheet** from the side menu.
2. Select the **License Keys** tab and click the  next to the appropriate license key.
3. Web TimeSheet will confirm that you want to delete a license key before removing it from the database. If you are sure you want to delete the license key, select Yes when prompted. If you selected the in error, select No to cancel the deletion and return to the About Web TimeSheet screen.


To delete multiple license keys:

1. Click on the **Admin** button at the top of the screen and select **About Web TimeSheet** from the side menu.
2. Click on the **License Keys** tab and select the check boxes next to the license keys you wish to delete. If you want to delete all license keys, select the check box labeled Select All (at the bottom of the list).
3. Click the Delete button to delete the selected license keys. Web TimeSheet will confirm that you want to delete the license keys before removing them from the database. If you are sure you want to delete the license keys, select Yes when prompted. If you do not want to delete the license keys, select No to cancel the deletion and return to the About Web TimeSheet screen.

Seat Assignments

The Seat Assignments tab is used to manage the individual seat assignments for each module license. Seat assignments can be applied to any module that uses a seat-based license (e.g., Offline TimeSheet). For modules that do not use seat-based licenses, a single license applies to all users in the system.

To edit the seat assignments for a specific license key:

1. Click on the **Admin** button at the top of the screen and select **About Web TimeSheet** from the side menu.
2. Select the Seat Assignments tab and click the  next to the appropriate module, or click on the underlined module name. The **Assign Seats** screen is displayed.

3. To add a user to the seat assignments, select a user's name from the list of available users. You may select more than one user by holding the Ctrl key while selecting the names. Click the >> button to add the selected user(s) to the list of assigned users.

To remove a user from the seat assignments, select the user's name from the list of assigned users. Click the << button to remove the user (the user's name will appear in the list of available users).

4. When you are finished assigning seats, click the Save button.

Application Server Clustering

Web TimeSheet servers can operate in groups of interdependent servers, known as Web TimeSheet clusters. Clustering allows multiple application servers to access the Web TimeSheet database, providing faster service to more clients by balancing requests across the cluster (load balancing). Using the clustering technology, you can add more servers as your organization grows.

To set up Web TimeSheet application server clustering (SQL or Oracle database), follow the instructions below:

1. Install the servers using one of the following methods:
 - Install the first server using the custom installation instructions in the Web TimeSheet Installation Guide. Then install the rest of the servers as upgrade installations, ensuring that you are installing on the same Web TimeSheet database.
 - Install each server with its own database and change the Web TimeSheet *rtserver.ini* file to access the common database.
2. Change the following entry in the *rtserver.ini* file for each server:

```
[Server]
preload = 1
cluster = 1
```
3. Restart all the Web TimeSheet servers.

Note ...

Clicking the Cancel button on any screen will cancel the process without saving your changes.

Make sure you change the Server entry in the *rtserver.ini* file for each server in the cluster ("Server", not "Service").

When you enter the cluster-enabled license key for the first server, it may take up to 12 minutes for the key to take affect on all the servers in the cluster.

The server addresses entered on the **WTS Clustering** screen must be the addresses that will be used when users access the servers.

Application server clustering is available ONLY for SQL and Oracle databases.

4. Log in to one of the servers using the “admin” account.
Enter your Web Timesheet license key (cluster enabled).
Refer to the *Add a New License Key* section earlier in this chapter for instructions on adding a license key.

To automatically redirect users to different servers in the cluster (load balancing), set up the clustered servers as follows:

1. Click on the **Admin** button at the top of the screen and click on **SETUP** to display a list of advanced setup options.
2. Select **WTS Clustering**. On the Web TimeSheet Clustering screen, click the Add button and enter the address, port (optional) and path for the first clustered server.
3. Click the Add button to save the server information.
Repeat these steps until you have added all your servers.







Chapter 2 - How to Get Help

Introduction


This chapter explains the online Help system provided with the Web TimeSheet application, including a guide to the Help menu and instructions for using the online Help system. The online Help system is the most comprehensive informational resource for Web TimeSheet and is available in an easy-to-use format, allowing you to access the help you need quickly and efficiently.

The Online Help Menu

The online Help menu contains the following options:

-  **Important Concepts**
A list of the most important and widely used features in Web TimeSheet. Each item is linked to more detailed information that will allow you to best implement the feature to fit the needs of your organization.
-  **Help Topics**
A list of online help topics by module. Each item accesses information about the specific features and processes for that module.
-  **Glossary**
A glossary of the standard terms used in Web TimeSheet, listed in alphabetical order.
-  **Index**
An index and search engine for finding information for a specific topic or feature. The search function finds terms that begin with the letters you enter.
-  **Contact Us**
Instructions for contacting Replicon to get technical support, report system defects or suggestions, or purchase Web TimeSheet.
-  **New**
A list of new features and enhancements to Web TimeSheet for version 5.7.

Using the Online Help System

You can access the online Help system from anywhere in Web TimeSheet by clicking on the **Help** link at the top of the screen. Some screens may contain a  that accesses context sensitive information. The Help icon is not available on all screens.

Although most of the online Help is not context sensitive, you can access specific information quickly and easily by using one of the online Help menu options.

Related Links

Most Help pages contain a section at the bottom for “related links.” These links access pages that provide similar information about the same topic or a related topic. Many pages also contain links throughout the Help text itself, allowing you to get additional information immediately, without using the Index or Help Topics.

Contacting Customer Support

If you encounter technical difficulties or wish to provide feedback about Web TimeSheet, you may contact Replicon’s Customer Support Team between 6:00 AM and 5:00 PM, MST.

Toll free in North America: 1-877-737-5420, ext. 3
Toll free in Europe: 00-800-7375-4266 , ext. 3
(800-REPLICON)
Toll free in Australasia: 011-800-7375-4266, ext. 3
(800-REPLICON)
All other areas: +1-403-262-6519, ext. 3

Online: <http://www.replicon.com>

E-mail: support@replicon.com

Chapter 3 - Quick Tour

Note ...

Expense features are available only if you have a valid license for the Expense module.

Offline timesheet features are available only if you have a valid license for the Offline TimeSheet module.

Introduction

This chapter is a quick tour of the more important features and concepts used in Web TimeSheet and includes information about the following:

- Standard terms and icons used in the application
- Web TimeSheet work flow and setup process
- Important concepts and widely used features
- Web TimeSheet menus

Standard Terms

Web TimeSheet uses terminology that you can adapt to any type of organizational structure and work flow process. You can organize clients, projects, time off and employees in a central database and report work and costs in many different ways.

Access Level

A term that specifies the type and amount of information a user may see when running reports.

Accrue, Accrual

A means for allowing users to accumulate time off over a period of time (by time off code), at a frequency set up by the administrator (either globally or per user).

Action

A term that identifies the various functions/features to which users may be granted access (permission).

Approval

Indication that timesheets and expenses are correct. Depending on the selected approval process, project leaders, clients, and supervisors can approve, reject and/or comment on timesheets and expense sheets.

Approval Forwarding

See *Substitute User*.

Approval Path

The process by which users' timesheets/expenses are submitted for approval. Approval paths may contain up to five levels, and may include approver types for project leaders, clients, supervisors, and/or other specified users. Approval paths are assigned to individual users in the user profile.

Approval Sequence

A term that specifies the order in which approvers will review and approve/reject users' timesheets and/or expenses.

Approver Type

A term that identifies the approvers used in approval paths. The approver type may be a supervisor, project leader, client, or other individually named user with approval responsibilities (e.g., time off approver).

Arbitrary E-mail Address

An e-mail address that may be entered "on the fly" when a user requests an offline timesheet.

Audit Trail

A means for tracking the timesheet save and approval history. The audit trail keeps a record of every time a timesheet is saved, who saves it, and what the total hours were at the time of the save. It also tracks the approvals (each time the timesheet is edited, approved, or rejected, and which approver performed the edit/approval/rejection).

Base Currency

The default currency used for all cost and time calculations. All costs are converted to base currency at the specified conversion rates.

Based on

A mechanism used in users, projects, and permissions to create new profiles based on existing profiles (copying the attributes to save time).

Billable

A term that indicates time and expenses will be billed to the client associated with the project.

You can "turn off" billing information in the system preferences, which will hide all billing features across Web TimeSheet.

Broadcast

An e-mail message sent to all users of Web TimeSheet. Broadcast messages are useful for notifying users of system upgrades, timesheet changes, project status, or news about your organization.

Client

A customer associated with one or more projects for billing and reporting purposes.

Client Billing

A means for allocating project time and expenses to individual clients.

You can "turn off" billing information in the system preferences, which will hide all billing features across Web TimeSheet.

Closed

Indicates when the term for a project/ task, timesheet or expense sheet has ended. Users cannot enter time or expenses against closed projects/tasks.

Closed time and expense sheets cannot be amended. A closed period indicates the time or expense sheet has been submitted for approval.

Comments

Text notes attached to specific time entries in a user's timesheet to make note of project status, due dates, or special circumstances related to a specific time entry. Timesheet comments can contain up to 2048 characters.

Copy From

A means for copying data from previous timesheets to the current (or future) timesheet.

Currency

The currency associated with project and expense rates, project costs, and billable and non-billable amounts.

Daily View

The view the user sees when entering time in the In-Out Timesheet format. This view is the only means the user has to enter time when using the In-Out feature.

DCAA Compliance

A means for setting up Web TimeSheet to meet the requirements of the Defense Contract Audit Agency (DCAA) for automated timekeeping systems. DCAA compliance also provides additional controls that will allow your organization to enforce business policies associated with DCAA, such as daily timesheet entry and notifying employees when they have new jobs.

Default Rate

The rate used to determine the starting value for billing and project costing. Individual default rates can be defined for each project, client, and role.

Department

A division of employees that defines the hierarchical structure, geographic regions, or functional groups of your organization. Departments can be assigned to projects/ tasks, and can be used to track information for reporting purposes. Departments may contain any number of users, but a user may be assigned to only one department.

Disclaimer

A signature message that appears on the timesheet, expense sheet, and/or approval screens for all users in the system.

E-mail Formula

A formula used to automatically generate a user's e-mail address based on the user's first and last names. The e-mail formula is created at the system level and applies to all new users entered in the system.

E-mail Notification

An automatic e-mail message that reminds users to complete their responsibilities. E-mail notifications can be enabled or disabled for specific users or system wide.

Employee Type

A group that identifies employees for the purposes of time tracking (full-time, part-time, contract, etc.) and human resources (time off). A user can be assigned to only one employee type.

Excel

An option that allows users to export report data to Microsoft Excel for further editing or review.

Note ...

Expense features are available only if you have a valid license for the Expense module.

Note ...

Expense features are available only if you have a valid license for the Expense module.

Offline TimeSheet features are available only if you have a valid license for the Offline TimeSheet module.

Productivity (utilization) information is available only if you have a valid license for the ProMax module.

Expense

A cost incurred from work-related tasks and/or purchases (travel, food, office supplies, etc.). Expenses may be non-billable or billable, the latter applying to expenses for a project funded by a specific client.

Expense Columns

A means for customizing which columns are available in the user's expense sheet. Expense columns are set at the system level and are either enabled or disabled.

Expense Summary

A summary view of the user's expense sheet. The summary includes only the most pertinent information, such as billable amounts and reimbursement totals.

Explicit

A term that specifies when a user/group has been allowed/denied access to a project or task as an individual. Explicitly allowing or denying access involves adding the name of the user/group to the Allowed or Denied list box on the **Edit Project/Edit Task** screen (also see Implicit).

External E-mail Address

The e-mail address used to send offline timesheets to a user.

Favorites

The tasks listed in a user's task drop-down menu. Favorites may include up to 50 tasks at one time. Favorites usually contain the newest tasks, but users can manage favorites to amend the list.

Filter

A means for limiting the amount of information displayed on a list screen.

Field Selection

A means for customizing reports. Field selection allows users to add or remove fields to reports. Each report has a different list of available fields.

Gross

The total amount of an expense, including taxes.

Gross-to-Net Formula

A formula used to calculate backwards from the gross amount to the net amount (pre-tax) of an expense. This formula applies to flat expenses only (not rated expenses such as mileage).

Grouping

A means for grouping data for reports, allowing users to view the same information in various ways. For example, a Project Status report might be grouped first by project, then by task, then by the users working on that task. Subtotals are calculated for each group level, where appropriate. Grouping options are provided with most reports.

Holiday Calendar

A means for defining a set of statutory (civic) holidays and assigning those holidays to specific users. Web TimeSheet identifies the assigned holidays in users' timesheets.

Hours per Day

The number of hours that constitutes a single day for a user. Hours per day are used to convert vacation time from hours (entered in the timesheet) to days (days remaining). You can set up hours per day in the System Preferences (system-wide default) and in each user's profile (overrides default). The Web TimeSheet default is eight hours per day.

Hourly Cost

A rate used for reporting purposes to determine project costs.

Implicit

A term that specifies when a user/group has been allowed/denied access to a project or task as a member of a larger group (user's department or <All>). Implicitly allowing or denying access means that the larger group has been explicitly allowed/denied access on the **Edit Project/Edit Task** screen.

In-Out Timesheet

A grid format timesheet where you can enter the start and end times when you work on a specific task during the day.

Internal E-mail Address

The e-mail address used to send Web TimeSheet e-mail notifications to the user.

Journals

Messages posted to a message board by users, project managers, and administrators. Journals are used to post information and updates about specific projects. Assigned users can access the message board and review messages pertaining to their projects.

Login Name Formula

A formula used to automatically generate a user's login name based on the user's first and last names. The login name formula is created at the system level and applies to all new users entered in the system.

Mass Update

A means for updating the same attributes for many users at once.

Multiple Rates

A means for assigning more than one rate to a member of a project team. Multiple rates require a user to select the appropriate rate when entering time against the project tasks. Multiple rates are useful if a single user has multiple responsibilities.

You can "turn off" billing information in the system preferences, which will hide all billing features across Web TimeSheet.

Net

The amount of an expense before taxes.

Non-billable

A term that indicates that time and expenses will not be billed to the client associated with the project.

You can "turn off" billing information in the system preferences, which will hide all billing features across Web TimeSheet.

Not Paid

Identifies expense sheets for which the reimbursement amounts have not been paid. The Not Paid button is used to undo the action of marking expense sheets as "paid". It is NOT used to reverse an actual payment disbursement.

Overdue

A term that indicates when timesheets and approvals are past their due dates.

Paid

Identifies expense sheets for which the reimbursement amounts have been paid. Paid status appears on the **Historical Expenses** (admin) and users' expense status (**Waiting for Approval, Approved, Rejected**) screens.

Payment Method

The method of payment for an individual expense (e.g., Visa).

Period in View

The read-only format used to view an entire period's entries for the In-Out Timesheet. This view is the only means a user has to submit the timesheet when using In-Out.

Permission

Defines the level of access and enabled features (actions) for a specific user. You can assign predefined permissions or create custom permissions to apply to a user's profile.

Print

An option that allows users to print timesheets, expense sheets, and reports.

Productivity Quota

A target set to measure user, department, and company productivity (billable targets vs. actual billable hours). Productivity is tracked in users' timesheets and reports.

Productivity Quotient

A rate calculated by dividing a user's utilization target (productivity quota) into the total number of billable hours recorded in each month's timesheet (actual divided by target). Each user's timesheet screen contains a utilization bar that keeps track of monthly progress. The timesheet may contain utilization bars for the user, department, and/or company, depending on the preferences set up by the administrator.

Project

A framework (structure) for organizing workgroup tasks. Projects identify the body of work to be completed by a team. Projects can have task assignments at multiple levels.

Project Assignment

A means for allowing only specific users to enter time against a project in their timesheets. Project assignments apply only to the project at the highest level, and do not automatically carry down to the sub-tasks. A project assignment differs from the project team in that the assignment determines who can work on the project at its highest level, whereas the project team includes all individuals working on the project at all levels of the structure (also see "Task Assignment").

Note ...

Expense features are available only if you have a valid license for the Expense module.

Utilization (productivity) information is available only if you have a valid license for the ProMax module.

Note ...

Expense features are available only if you have a valid license for the Expense module.

Project Cost

The internal cost for a project.

Project Note

A journal entry associated with a project.

Project Rate

The default billing rate for a project. The project rate automatically applies to all time entered against the project and its associated tasks. When a project team is initially assigned, each team member will, by default, use the project rate; however, each member's rate can be changed as necessary.

Project Team

A group of users who can work on a project or its associated tasks. Each member of the project team is assigned a rate that will be used to calculate the cost incurred for the time that user spends working on the project. The project team differs from a project assignment in that the team includes all individuals working on the project at all levels of the structure, whereas a project assignment determines who can record time against the project at its highest level (also see "Task Assignment").

Project/Task Progress

A means for tracking the work progress for individual projects/tasks. Project/task progress is displayed in a progress bar on the **Edit Project, Add/Edit Task, Project Structure**, and **Timesheet** screens, as well as in reports. The progress bar includes the actual hours worked (by all users assigned to the project/task), estimated hours, and percentage completed.

Quantity

The number of "units" used to calculate the total expense amount for rated expense types (e.g., mileage).

Quick Add

A means for adding multiple users at once.

Reimburse

A term that identifies expenses for which the user paid out of pocket and requires compensation.

Reset

A means for resetting the number of time off days to which users are entitled over a period of time. For example, a company may allow a user 15 vacation days per year, to be

reset (start over) on January 1st each year. The reset frequency may vary by time off code (global) and user.

Role

A term that identifies a type of work charged at a specific rate. A role can describe a specific action/function or a level of expertise within the project team. Roles are initially created globally, then assigned to a project and appropriate project team members.

You can "turn off" billing information in the system preferences, which will hide all billing features across Web TimeSheet.

Role Rate

The rate associated with a specific role. Role rates are defined at the global level, but can be changed from within a project. Because each project owns its rates, changes made outside a project will not affect the rates within the project.

You can "turn off" billing information in the system preferences, which will hide all billing features across Web TimeSheet.

Roll-up

A system-wide option that allows your organization to automatically calculate estimates (hours and cost) based on the lowest level tasks in a project hierarchy.

Seat

An individual unit of a license key that can be assigned to a user to provide access to a specific module. The following Web TimeSheet add-on modules are seat-based:

- Expenses
- MS Project
- Offline TimeSheet
- ProMax

Seat Assignment

A means for allocating use of an add-on module to one or more users. Seat assignments provide a user with access to the associated module.

Standard Timesheet

A term that identifies the traditional timesheet format, where a user enters the total hours worked on each task per day.

Substitute User

A user authorized to manage tasks on behalf of another user. Each user can have multiple substitutes with different permissions.

Tag

A macro that batches information into a list (miniature report) within an e-mail notification. Tags are listed at the bottom of each e-mail notification template with a definition that explains its use.

Task

Identifies a level within a project. A single project may have many tasks and up to ten levels.

Task Assignment

A means for allowing only specific users to enter time against a particular task in their timesheets. Task assignments apply only to a single task within the project structure and do not automatically inherit from the project or carry down to the sub-tasks (also see "Project Assignment").

Task Row Level

A term that identifies user defined fields that will apply to timesheet task rows. These fields appear as columns in both the Standard and In-Out timesheet formats.

Task Hours Level

A term that identifies user defined fields that will apply to timesheet task hours (individual hour cells). These fields appear either at the bottom of the timesheet with the comments (Standard format) or as additional columns (In-Out format).

Tax

A fee added to the net amount of an expense.

Tax Formula

A formula used to calculate tax amount based on the net amount of an expense. A separate tax formula is created for each tax code that will be used in the Expense module.

Time Off

An item that identifies employee time and benefits against which users log their time (vacation, sick days, statutory holidays, etc.). Time off can be enabled/disabled at a global level (system wide) or at a user level (e.g., contractors or interns may not be allowed to enter vacation).

Timesheet

A means for tracking time across projects or time off by an individual user within an organization. Web TimeSheet allows you to manage time and costs across departments, projects, employee types, and clients.

Timesheet Period

A date range that specifies how frequently timesheets are submitted. Timesheet periods should parallel your organization's pay periods. Timesheet periods can be created for the entire system (all users), employee types and/or departments.

Unsubmit

An option that allows a user to recover a timesheet or expense sheet that was submitted in error. The Unsubmit option is available only before a timesheet/expense sheet is approved.

Usage Statistics

Anonymous data about your hardware configuration and Web TimeSheet usage that is collected by Replicon Inc. (if your organization chooses to participate) to help improve the quality, reliability, and performance for the Web TimeSheet application. The anonymous information obtained from you and other participants is used to improve Web TimeSheet and related services.

Replicon does not collect your name, address, or any other identifying information about your organization - the process is safe, secure, transparent, and completely anonymous.

User

Any individual with access to enter data, create or manage projects, or assign tasks. Any number of user types may be created (administrator, supervisor, etc.). Each user has a name, a login name, a login password, and a profile.

User Defined Field

A custom field used for informational purposes and reports. User defined fields can be formatted for dates, numbers, text, or drop-downs (selection from a list).

User Group

A group of users created in order to generate meaningful reports. User groups may also be used to filter lists of users at various locations within Web TimeSheet.

Note ...

Expense features are available only if you have a valid license for the Expense module.

User group features are available only if you have a valid license for the User Grouping module.

Productivity/utilization features are available only if you have a valid license for the ProMax module.

Note ...

Productivity/utilization features are available only if you have a valid license for the ProMax module.

User Rate

A specific rate defined for a particular member of a project team. The user rate applies only to the selected user and is specific to the project and its associated tasks.

You can "turn off" billing information in the system preferences, which will hide all billing features across Web TimeSheet.







Utilization Target (Productivity Quota)













A target set to measure user, department, and company productivity (billable targets vs. actual billable hours). Utilization is tracked in users' timesheets and reports.

Utilization Rate (Productivity Quotient)

A rate calculated by dividing a user's utilization target (productivity quota) into the total number of billable hours recorded in each month's timesheet (actual divided by target). Each user's timesheet screen contains a utilization bar that keeps track of monthly progress. The timesheet may contain utilization bars for the user, department, and/or company, depending on the preferences set up by the administrator.

Standard Icons

| Icon | Name | Description |
|---|----------|--|
|  | Add | Used to add new subsidiary items such as departments or tasks, or to add rows to the timesheet. |
|  | Approve | Used to approve an individual timesheet, expense line, or expense sheet. |
|  | Calendar | Used to access a calendar of valid business days. Select a date from the calendar to enter it into a date field. |
|  | Delete | Used to delete an individual item such as a user or task, or an entire timesheet row. |
|  | Details | Used to view a complete timesheet from a list of timesheets or approval details for timesheets and expenses. |
|  | Edit | Used to edit existing records. |

| | | |
|---|---------------------|--|
|  | Help | Used to access context sensitive information (online) for certain Web TimeSheet concepts. This icon is not available on all Web TimeSheet screens. |
|  | Logout | Used to log out of Web TimeSheet (end session). |
|  | Maximize | Used to maximize the side (left) menu. |
|  | Minimize | Used to minimize the side (left) menu. |
|  | Maximize | Used to maximize the top menu. Also used to show the raw data filters in the Pivot reports. |
|  | Minimize | Used to minimize the top menu. Also used to hide the raw data filters in the Pivot reports. |
|  | Notification | Used to notifies users when timesheets and expenses are rejected, and notifies approvers when timesheets and expenses are waiting for approval. |
|  | Reject | Used to reject an individual timesheet, expense line, or expense sheet. Rejecting an item returns it to the user, who must correct and resubmit the item for approval. |
|  | Show Full Task Name | Used to show the task full path name when there are too many task levels to display on the timesheet. |
|  | Summary | Used to access the Expense summary for a particular expense sheet. |
|  | Switch User | Used to switch to the login for a different user when acting as a substitute. |
|  | Users | Used to displayed a complete list of users. This icon is displayed only if the system preferences indicate that available users will not be listed in a drop-down box. |

Understanding the Workflow

The following diagram explains the general flow of work in Web TimeSheet.



1. Create projects and tasks and assign project teams, rates and billing options to allow users to enter billable and non-billable time and expenses. You will be able to track all time and expenses to calculate project costs and ensure accurate client billing.
2. Users complete their timesheets by entering time against projects or time off codes. Users can enter time only for those projects for which they are part of the project team. All time is either billable or non-billable. Once completed, users submit their timesheets for approval.
3. Once submitted, users' timesheets are sent to the appropriate project leaders, clients, and supervisors for approval. Approvers can approve or reject the timesheets. Approved timesheets are closed so the data can be processed.
4. Any user with report access can generate reports to review data in the system including project status, timesheet status, billing, time off, and utilization. All reports can be customized and saved in public or private folders for future use.

Understanding the Setup Process

The following diagram is an overview of the basic setup process, which will allow you to get started using Web TimeSheet. For more detailed setup information, refer to *Chapter 4 - Getting Started*.



- 1a. Setting up users is the first step in configuring Web TimeSheet. Users are added from the **Admin** menu. You will need to set up each user's login information, access rights, department, hourly cost rate, etc. Once you have set up users, you can assign them time off and projects/tasks.
- 1b. Set up each user with the appropriate time off codes, including any accrual/reset information and available days, where applicable.
- 2a. Go to the **Projects** menu to create clients, roles, and projects/tasks. For each project, assign a default billing rate, a client, and tasks. Initially, new projects are available in all users' timesheets.
- 2b. Assign a project team to allow only specific users to enter time against a project. The project team can include all users in the system, departments (includes all users in the department), or individual users.
- 2c. Give each member of the project team a billing rate(s). The rate will be used to calculate the billing amount for all billable time the user enters against the project. Rates may include the project rate, roles, or user specific rates. All rates are owned by the project and are not affected by outside changes.
3. Once you have completed the setup process, users can enter timesheets and expenses.
4. You can generate reports at various stages of the setup process and after users have entered timesheets and expenses.

Note ...

Expense features are available only if you have a valid license for the Expense module.

Note ...

Expense features are available only if you have a valid license for the Expense module.

Introduction to Important Concepts

The following concepts are important features of Web TimeSheet. This section contains only an introduction to these concepts. Refer to the subsequent chapters for more detailed information about each feature.

Rates and Billing

When you set up a project, you will do the following in addition to setting the basic project characteristics:

- define the rates to be used for the project
- assign a project team and associate rates with each team member,
- specify whether the project can have billable time, non-billable time, or both.

How you set up your project directly affects what users will see on their timesheets. A task may allow both billable and non-billable work, or a user may have multiple rates. If a user has multiple rates, that user will be required to select the appropriate rate when entering time against the project. If a task allows both billable and non-billable work, the user will be required to select the appropriate billing option when entering time. There may be some instances where these two situations are combined (i.e., a user may have a choice of multiple rates for billable work, and a choice for non-billable work).

Once a project is set up with the proper rates, project team members can enter time against the project. The billing amount for the project is calculated based on the project rates and the time entered. The billing amount is also affected by the billing setup for each task associated with the project.

Refer to *Chapter 4 - Getting Started* for a more in-depth look at projects, rates, and billing.

Project Costing

You can track project costs to determine your costs vs. revenue for each project. Project cost is defined as the User Hourly Cost Rate x (Billable Hours + Non-billable Hours). The user hourly cost rate is specified in the user profile. The billable and non-billable hours are determined by the timesheet and apply only to the selected project.

The revenue for a project is calculated as Project Specific Rate x Billable Hours. The project specific rate is the rate assigned to the user at the project level.

Refer to *Chapter 4 - Getting Started* for further information about setting up user hourly cost rates, project rates and project billing.

Timesheets

Timesheets are used to enter time against specific projects/tasks and time off codes. Users complete and submit their timesheets to supervisors, project leaders, and/or clients for approval. The timesheets are then reviewed and either approved or rejected.

Depending on the system configuration, supervisors, project leaders, and clients can either correct or reject timesheet items. Timesheets with rejected items are returned to the users for correction. When all items are approved, the time information is saved to the database.

Once a timesheet is submitted, the data can be analyzed by project leaders and supervisors to determine project status and costs, and to make more efficient resource planning decisions.

Timesheets display information based on the system configuration and the parameters entered in the user profiles. Each user's timesheet is unique, and the requirements for each timesheet entry may vary.

Refer to *Chapter 6 - Daily Operation* for more detailed information about timesheet entry, submission, and approval.

Reports

Reports are helpful for determining how time is utilized throughout your organization and for reviewing project costs and client billing. You can generate reports to review detailed or summarized data.

All reports can be customized by filtering data and selecting report settings. Filters allow you to extract data based on specific selection criteria such as client name or project.

Once you have generated a customized report, you can save that report for public or private use. Public reports are available to all users who have access to reports. Private reports are available only to the user who creates them.

Generated reports can be reviewed in Web TimeSheet, printed, or exported to a Microsoft Excel spreadsheet for further editing/ review.

Refer to *Chapter 8 - Reports* for further information about Web TimeSheet's reporting features and a description of the individual reports.

Permissions

Permissions are used to define the activities and features users can access. Each permission profile has a name, description and list of actions. The administrator assigns permissions to each user when setting up the user profile.

Permissions allow you to restrict or expand a user's access to Web TimeSheet. Consider each permission carefully before assigning actions to that permission. Remember that each permission can be applied to any user.

You can create custom permissions to fit the needs of your organization, or edit the information for existing permissions.

Refer to *Chapter 9 - Administrative Functions* for detailed information about permissions and how to set up system security.

Approvals

The approval process ensures that time is entered correctly for more efficient and accurate project and time off analysis. Web TimeSheet provides a default approval process that you may customize for your organization. If you choose to customize this process, you should change the approval settings before creating projects and allowing users to enter timesheets/ expenses (see *Chapter 5 - Advanced Setup Options*).

Web TimeSheet sends e-mail notifications (if enabled) to inform approvers when timesheets/expenses are waiting for approval, or to inform users when timesheets and expenses have been rejected (see *Chapter 5 - Advanced Setup Options*).

Users can view their timesheet/expense history at any time. The timesheet/expense history is a record of old timesheets/ expenses including comments and approval details.

Refer to *Chapter 6 - Daily Operation* for more information about approving timesheets and expenses.

E-mail Notifications

Web TimeSheet provides many predefined e-mail notifications that remind users to complete their responsibilities. E-mail notifications can be sent automatically at the end of each period.

Each e-mail notification can be customized to fit your organization's needs. You can edit e-mail information or disable certain e-mails. Some e-mail notifications contain tags that batch information into a list (miniature report) within the e-mail notification. These tags are listed at the bottom of each e-mail notification template with a definition.

Refer to *Chapter 5 - Advanced Setup Options* for detailed descriptions of each e-mail notification and instructions for customizing notifications for your organization.

Time Off

You can set up available time off globally or for each user in the system for the purpose of tracking how many days each user has remaining for the year. Time off can be tracked in timesheets and reports so the user, the user's supervisor, the payroll manager, and the Web TimeSheet Administrator always know how much time has been taken, and how many days are remaining for each user.

Time off may include automatic time off accrual on a weekly, monthly, semi-monthly, or yearly basis. The accrual settings are maintained globally for each time off code, with the option to override global settings at the user level. Automatic accruals allow you to create time off codes that will accumulate over time, such as vacation.

Each time off code may also be reset automatically on a weekly, monthly, semi-monthly, or yearly basis. Automatic reset allows you to create time off codes that fulfill the "use it or lose it" policy. For example, your organization may allow certain employees one flex day per month, without the option to accumulate the days. You can set up a Flex Day time off code that will reset to one day on the first of every month, which will prevent users from accumulating flex days over a period of time.

Note ...

Expense features are available only if you have a valid license for the Expense module.

Note ...

The ProMax tab is available only if you have a valid license for the ProMax module.

Expense features are available only if you have a valid license for the Expense module.

Reset options, like accruals, are maintained globally for each time off code, with the ability to override the global settings at the user level.

Accruals and reset options can be used separately, as in the two examples above, or concurrently. View the time off scenarios for examples of how you may best set up time off codes to fit the needs of your organization.

Refer to *Chapter 4 - Getting Started* for detailed information and time off setup scenarios.

Substitute Users

A user can authorize another user to manage his/her tasks by assigning a substitute user. Each user can have multiple substitutes with different permissions. Each substitute user's permissions are determined by the user who sets up the substitute. A substitute user can also receive the e-mail notifications for permitted actions.

For example, if John Smith assigns Martha Brown as his substitute and gives Martha the ability to enter his timesheets, John can also enable timesheet notifications so Martha will know when John's timesheet is due.

Refer to *Chapter 7 - User Configuration* for further information about setting up substitute users.

Minimizing the Menus

You can minimize the top menu or the side menu at the left of the Web TimeSheet screen. This feature is especially useful if you're using timesheets, expenses, or approvals and want to increase the amount of screen space.

To minimize the top menu, click the arrow in the top right corner of the top menu. Web TimeSheet will maintain this view as long as you are logged into the application. To restore the menu, click the arrow again.

Use the same process to minimize the side menu by clicking the arrow in the top right corner of the side menu.

About the Navigation Bar

You can use the Web TimeSheet navigation bar to move around the application based on the type of work you are doing. Each tab at the top of the screen accesses a different menu. Below is a description of the Web TimeSheet tabs and links in the order they appear in the navigation bar.

| Button/Link | Description |
|-------------|---|
| ProMax | Access the ProMax module to track productivity levels and the time collection process across the organization. |
| Admin | Configure Web TimeSheet for your organization. The Admin menu includes basic and advanced setup options, security, system configuration and approval preferences, and system information. |
| Projects | Add clients, create roles, and set up projects. Setting up projects includes assigning a project team, setting up a task hierarchy, defining rates, and identifying available expenses. |
| Timesheet | Enter time against projects and time off codes, access personal timesheets by period (using the calendar) or by approval status, view a list of holidays, and manage timesheet favorites. |
| Expense | Enter expenses (stand-alone or project-related) and access personal expense sheets by approval status. |
| Journals | Add and view project notes. |
| Approvals | View, approve, or reject timesheets and expenses that are waiting for your approval, and review previously approved/rejected timesheets and expenses. |
| Reports | Generate reports for timesheets, billing, project status, expenses, and administrative information; customize report settings; save customized reports; and export or print reports. |
| Integration | Download/install and/or access Integration Managers purchased by your organization. Enable/disable connections between Web TimeSheet and external applications. |

- Configuration Set up your personal display preferences, change your e-mail address or password, and identify substitute users.
- Switch User Switch between your own login access and the users for whom you are a substitute.
- Logout Close this session of Web TimeSheet.
- Help Access online Help.

Chapter 4 - Getting Started

Note ...

If you installed the Web TimeSheet Access version, the installation included a sample database that provides predefined timesheet periods.

You will not need to set up timesheet periods, though you can, of course, customize any of the existing periods as necessary.

Clicking the Cancel button at the bottom of the screen will cancel the process without saving the timesheet period information.

Introduction

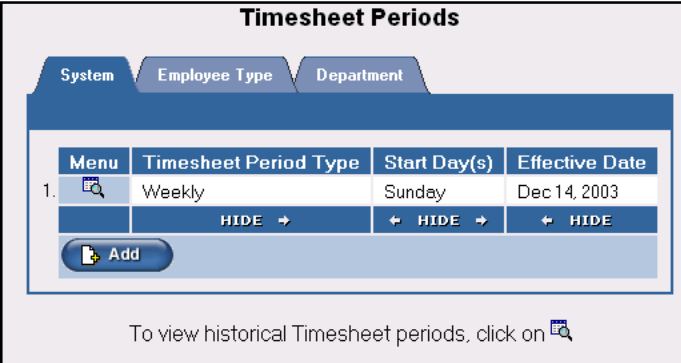
This chapter describes the basic setup requirements to use Web TimeSheet on a daily basis. You may choose to further customize the application with advanced features, available in *Chapter 5 - Advanced Setup Options*.

Timesheet Periods

Setting up timesheet periods is the first step in configuring Web TimeSheet for your organization. Timesheet periods are date ranges that specify how frequently timesheets are submitted. Timesheet periods should parallel your organization's pay periods.

Timesheet periods can be created for the entire system (all users), employee types, or departments. A system timesheet period applies a single period to your entire organization. It is recommended that you use a system timesheet period, as it is the easiest method to manage.

Timesheet periods will be associated with each user you add to your system; therefore, you must add timesheet periods before setting up users. Once timesheet periods are defined and assigned to a user, the user's timesheets will be created.



Timesheet Periods

System Employee Type Department

| Menu | Timesheet Period Type | Start Day(s) | Effective Date |
|-----------|-----------------------|--------------|----------------|
| 1. [icon] | Weekly | Sunday | Dec 14, 2003 |
| | HIDE → | ← HIDE → | ← HIDE |

[Add]

To view historical Timesheet periods, click on [icon]

To create a timesheet period:


1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Click on **Timesheet Periods** and select the tab that corresponds with the timesheet period you want to create.
3. Click the Add button to set up a new timesheet period.
4. Specify the timesheet period type. The type determines how often a new timesheet period is generated. You can set up your timesheet period to regenerate weekly, bi-weekly, monthly, or semi-monthly. Selecting the Manual* option will allow you to customize the start and end dates for the timesheet period.
5. You will need to select the first day of the week for the timesheet period. This is the day when the timesheet period will be regenerated.
6. Now enter the date when this timesheet period will take effect. The effective date should occur on the day of the week specified in step five. When you are finished, select the Add button at the bottom of the screen.

* The Manual timesheet period type allows you to create a customized timesheet period with specific start and end dates. A Manual timesheet period might be useful if there is a time period where your organization will not follow the standard timesheet period schedule.

Create a Manual timesheet period as you would any other timesheet period type. Instead of selecting a weekday and effective date for the period, you will need to enter start and end dates. After the end date, the Manual timesheet period will no longer be in effect.

View Historical Timesheet Periods

You can view the historical timesheet periods based on the kind of timesheet period (system, employee type, department). To view historical settings:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Click on **Timesheet Periods**, select the appropriate tab, and click the  next to the timesheet period to view the historical data.

Users

A user is any individual who enters data, creates or manages projects, or assigns tasks. Any number of user types may be created (administrator, payroll manager, supervisor, etc.), depending on the maximum number of enabled users specified in the license agreement. Each user has a name, an ID, a password, and a profile.

Supervisors and payroll managers should be created before adding other users. Begin with the highest position and work your way down through each level of your hierarchical structure. Creating the higher positions first will allow you to immediately assign the appropriate supervisor to each subordinate user.

Web TimeSheet offers multiple ways for adding and editing users, allowing you to simplify and speed up the administrative process while still maintaining efficiency.

Users can be added one-by-one or en-masse using Quick Add. The Quick Add option allows you to add multiple users at once and requires only the most basic information to create a profile for each user.

You can also edit users one-by-one or en-masse using the Edit Multiple Users option. Edit Multiple Users allows you to change profile attributes for multiple users at one time.

Viewing a List of Users

To view a list of existing users, click on the **Admin** button at the top of the screen and select **Users** from the side menu. Filter the list by department, employee type, or status to view users with specific criteria.

Filtering Users

You can view a list of existing users by clicking on the **Admin** button at the top of the screen and selecting **Users** from the side menu. On the **User Information** screen, the Basic Filter section provides common fields you may use to limit the displayed user list. To use these filters, select an item from one or more of the drop-down lists and click the Apply button. The screen will refresh with the filtered data.

To specify more advanced search criteria:

1. Click the Advanced Filter button to display the Advanced Filter section.
2. The Advanced Filter section provides common fields as well as more detailed fields you can use to limit your list of users. If you enter criteria in the text fields, Web TimeSheet will search for any users containing the text in the same order you entered it. For example, if you search for “doug” in the First Name field, the search will return any user with “doug” in their first name.
3. When you are finished entering the necessary search criteria, click the Apply button. The list of users will refresh based on the criteria you specified.

To restore the original list, click the Reset button. The Reset button restores all filters to their default settings. To apply the default settings, click the Apply button (clicking the Reset button does not automatically apply the restored filters).

Adding/Editing a Single User

The user profile contains all information relevant to a single user. This information is grouped into logical sections on the **Add/Edit User** screen. You can access this screen either by adding a new user, or editing an existing user, as follows:

If adding a new user:

1. Click on the **Admin** button at the top of the screen and select **Users** from the side menu.
2. Click the Add button on the **User Information** screen. The **Add New User** screen is displayed.

Note ...

Filter criteria are saved during the same Web TimeSheet session; however, basic settings will not transfer to advanced settings (and vice versa).

Clicking the Cancel button on any screen will cancel the process without saving your changes.

Note ...

Remember to save the user profile each time you make changes on the **Add/Edit User** screen.

Clicking the Cancel button on any screen will cancel the process without saving your changes.


If you are using Windows NT authentication instead of a Web TimeSheet password, NT Login must be enabled in the system preferences.

You will be required to enter the domain name instead of a password for each user to whom Windows NT authentication applies.

Refer to *Chapter 9 - Administrative Functions* for further information about Windows NT authentication.

The external e-mail address is available only if you have a valid license, and the user has been granted a seat assignment for the Offline TimeSheet module.

If editing an existing user:

1. Click on the **Admin** button at the top of the screen and select **Users** from the side menu.
2. Click the  next to the name of the user whose profile you wish to edit., or click on the user's underlined name. The **Edit User** screen is displayed.

The **Add/Edit User** screen is divided into the following sections, which allow you to view all the user's information at a glance:

- Personal Information
- Login
- Access Rights
- Advanced
- User Groups
- Seat Assignments
- Time Off
- E-mail Notifications.

Each section is permission-based, providing additional security and the ability to divide administrative tasks among multiple users (e.g., a network administrator may control login information, access rights, and e-mail notifications, while a payroll/human resources administrator may control the advanced user information and time off settings). Refer to *Chapter 9 - Administrative Functions* for further information about permissions.

Personal Information

The Personal Information section contains the user's basic information, including:

- First Name
- Last Name*
- Employee Id
- Internal E-mail Address
- External E-mail Address (requires Offline TimeSheet)
- Supervisor

* You must enter the user's last name, as this information is required to distinguish one user from another. If you have multiple users with the same last name, you must enter both the first and last names to differentiate between the users. If users have the same first and last names (e.g., John Smith), you will need to add an initial or other distinguishing factor or Web TimeSheet will not allow you to save the user.

Login

The Login section contains the user's login name and password. This information is required when adding a new user. When editing an existing user, the user's password will appear as a blank field; however, this is for security purposes and does not mean you have to enter a new password

Always remember to save the user profile after making any changes on the **Add/Edit User** screen.

Access Rights

The Access Rights section is used to specify which features of Web TimeSheet the user can access. This section is initially available in read-only mode, and displays a list of permissions already assigned to the user.

To edit a user's access rights, click the Edit button in the upper right corner of the Access Rights section. The **Edit User Permissions** screen is displayed.

To add permissions:

1. From the list of available permissions, select the permissions you want to assign to the user. Hold down the Ctrl key to select multiple permissions.
2. Click the >> button to add the selected permissions to the user's access rights.
3. When you are finished, click the Save button to save your changes and return to the **Add/Edit User** screen.

To remove permissions:

1. From the list of user's permissions, select the permissions you want to remove from the user. Hold down the Ctrl key to select multiple permissions.
2. Click the << button to remove the selected permissions from the user's access rights.
3. When you are finished, click the Save button to save your changes and return to the **Add/Edit User** screen.

Advanced

The Advanced section contains additional information about the user. To edit this information:

1. Specify whether the user is part of a department or client, and select the appropriate department or client from the provided list. If the user is not part of a specific department or client, select None.
2. Select the user's employee type.
3. Enter the user's start and end dates (optional). The start date defaults to today's date, but can be overridden.
4. Select the timesheet period that will be used to set up the user's timesheets. The timesheet period will determine how often the user's timesheets are submitted for approval.
5. Now select the approval paths that will determine the approval process for the user's timesheets and expenses. You may select one path for timesheets and one for expenses. You will be able to select an approval path for expenses only if your Web TimeSheet license includes the Expense module.
6. Enter the user's hourly cost rate (optional). The hourly cost is a rate used for reporting purposes to determine project costs. For existing users, you cannot edit the hourly cost from the Edit User screen. You must go into the hourly cost history.
7. Enter the number of hours that constitute a single day for the user. Hours per day are used to convert time off hours (entered in the timesheet) to days, so the time off can be tracked both in the timesheet itself (as days remaining/days taken) and in reports. This field defaults to eight hours per day.
8. Select the user's default holiday calendar. The selected calendar will be used to identify statutory (civic) holidays in the user's timesheets.

User Groups

The User Groups section is used to identify the user groups to which a user belongs. This section is initially available in read-only mode, and displays a list of user groups already assigned to the user.

To edit a user's groups:

1. Click the Edit button in the upper right corner of the User Groups section. The **Assign User to Groups** screen is displayed.
2. From the list of available user groups, select the groups you want to assign to the user. Hold down the Ctrl key to select multiple groups.
3. Click the >> button to add the selected groups to the user's assigned user groups.
4. To remove user groups, select the user groups you want to remove and click the << button.
5. When you are finished, click the Save button to save your changes and return to the **Add/Edit User** screen.

Seat Assignments

The Seat Assignments section allows you to select the modules for which you would like to assign a seat to the user. You can assign seats corresponding to the seat-based modules for which you have a valid license.

Assigning a seat to the user will allow the user to access the features of that module, depending on the user's access rights (e.g., a user may be granted access to only specific portions of a module). By default, a new user will not have any seat assignments. To assign seats, simply select the check box corresponding to the module for which you would like to assign a seat.

Time Off

The Time Off section of the user profile is used to specify which time off codes the user can access, to allocate hours/days and to set up accruals/reset options where necessary.

This section is initially available in read-only mode, and displays a list of time off codes (in alphabetical order) that have already been assigned to the user (including any settings associated with each code). By default, all enabled time off codes (at the global level) are assigned to new users.

Note ...

Remember to save the user profile each time you make changes on the **Add/Edit User** screen.

Clicking the Cancel button on any screen will cancel the process without saving your changes.

User group features are available only if you have a valid license for the User Grouping module.

Expense features are available only if you have a valid license, and the user has been granted a seat assignment for the Expense module.

To edit a user's time off:

1. Click the Edit button in the upper right corner of the Time Off section. The **Edit User Time Off** screen is displayed, which contains all time off codes that have been enabled at a global level.
2. Select the check box next to all time off codes you want to assign to the user. Assigned time off codes will be available in the user's timesheets.
3. Enter the total number of hours/days the user is allowed as of a specific date (time off will be available in hours or days depending on your selected system preferences). The "as of" date is the date from which Web TimeSheet begins calculating the hours/days remaining or taken for the time off code. The hours/days remaining or taken will be based on the information entered in the user's timesheets.
4. Now set up the automatic accrual and reset options for the assigned time off codes, where applicable. If global settings have already been created for a time off code, you may override these settings, if necessary. If you are unsure how best to set up the accrual and reset options, refer to the *Time Off Scenarios* section of this chapter for additional help.
5. When you are finished setting up the user's time off, click the Save button to save your changes and return to the **Add/Edit User** screen.

E-mail Notifications

The E-mail Notifications section allows you to specify which e-mail notifications the user is authorized to receive. By default, all e-mail notifications are enabled. To disable specific notifications, deselect the check box that corresponds with the e-mail notification you want to disable.

You will notice that the System Error/Warning e-mail notification appears in the user profile, but not on the **E-mail Notifications** screen. This e-mail notification cannot be customized - it is a system e-mail that notifies the user when something has gone wrong in Web TimeSheet (e.g., timesheets are waiting for approval by a user whose login is disabled), and is automatically sent by Web TimeSheet (sent daily at midnight, when

applicable). You should enable this notification only for those users with authority and permission to take action when a problem occurs, such as the administrator.

Quick Add


The Quick Add feature allows you to add multiple users at once. You need to enter only the most basic user specific information (e.g., name, login id, password) for Web TimeSheet to create individual profiles. The more specific information (e.g., access rights) is based either on system defaults or another user profile (you choose), both of which can be edited later on a user-by-user basis or en masse.

If you choose to apply the user's supervisor from the **Quick Add** screen, you should create all supervisors before adding the other users.

The fields displayed on the **Quick Add** screen can be customized to fit your needs (see *Settings*). If you want to base certain fields on another user's profile (or use the system defaults), do not display them on the **Quick Add** screen. For example, you may wish to copy the supervisor or hours per day on another user rather than enter them here. To achieve this, you must not display them on this screen.

To add multiple users:

1. Click on the **Admin** button at the top of the screen and select **Users** from the side menu.
2. Click on the Quick Add button. The **User Quick Add** screen is in a grid format, allowing you to easily tab through the fields for quick entry. You can enter 10 users per screen.
3. Enter each user's name and login name. If you have set up a formula for the login name in the system preferences, the combination of first and last name will automatically generate the user's login name.
4. You must enter a password for each new user; however, if you are using Windows NT authentication for a user, the NT Login check box should be selected, and the domain name should be entered instead of a password.
5. Enter the user's e-mail address (as with the login name, if you have set up a formula for the e-mail address, the user's e-mail will be automatically generated using the first and last name).

6. Select the user's supervisor from the drop-down list (if the user doesn't have a supervisor, select <None>).
7. You may choose to base the new user's profile on the profile of an existing user. This option allows you to override the system defaults and copy all attributes from another similar user. For example, you may want to create one user for a single department, on which all other users will be based. This will allow you to use the Quick Add feature without needing to edit the profiles later. Before basing new users on an existing user, you can view the details for the existing user by clicking the  next to the drop-down list.
8. When you are ready to add more users, select the Add More check box and click the Save button. The information will be saved and the screen will be cleared.

Settings

You can use the Settings option to either add or remove certain fields from the **Quick Add** grid. Adding fields will allow you to enter additional information for the user from **Quick Add**, while removing fields will allow you to copy the information from an existing user (or use the system defaults).

To access the **Settings** screen, click the Settings button at the bottom of the **Quick Add** screen. You can add/remove any of the following fields:

- First Name
- Internal E-mail
- Supervisor
- Employee Id
- Start Date
- End Date
- Hours Per Day
- Hourly Cost
- Based On

You cannot remove the Last Name, Login Name, or Password fields from the **Quick Add** screen because these are user specific, required fields.

Edit Multiple Users

The Edit Multiple Users feature allows you to edit users' profiles en masse. This option is useful if you have to make the same change to many profiles. For example, if a supervisor is promoted, all users reporting to that supervisor will need to be reassigned to a different supervisor. You can reassign all the users at once using the Edit Multiple Users feature (rather than change the supervisor in each individual profile).

Some fields are unique to each user and cannot be edited using the Edit Multiple Users feature. Fields that cannot be edited include the following:

- First Name
- Last Name
- Internal E-mail Address
- Login Name
- Employee Id
- User Groups

All other information provided in the user profile can be changed for multiple users at once.

To edit multiple user profiles:

1. Click on the **Admin** button at the top of the screen and select **Users** from the side menu.
2. On the **User Information** screen, select the check box next to the users whose profiles you want to edit (or use the Select All option to edit all users). Note that the admin account cannot be edited en masse (it will need to be edited separately).
3. Click the Edit button to access the **Edit Multiple Users** screen.
4. Update the profile information as necessary, taking note of the following:

Personal Information

The only personal information you can edit en masse is the users' supervisor. Make sure you specify whether the new supervisor should replace the existing supervisor, or be added to the supervisor history with a new effective date.

Note ...

Changes made using the Edit Multiple Users option are noted at the bottom of the **Edit Multiple Users** screen.

If you need to restore the original settings on the **Edit Multiple Users** screen, click the Reset button.

Reset will override any changes you have made with the original settings.

Note ...

You cannot delete a user who has timesheets or expenses in the system. In this situation, you should disable login for the user, which will prevent further access to the system.

To disable login, follow the instructions for editing a user and select the Disable Login check box in the user's profile.

Clicking the Cancel button on any screen will cancel the process without saving your changes.

Accruals do not accumulate and resets do not occur in the past (not retroactive).

If you are implementing accruals on June 1st, for example, you should set up the Allowed days to include all accrued days up to June 1st, and begin the accruals on or after June 1st. The reset date should occur on or after June 1st, as well.

Login

You can change passwords or disable login for multiple users at once. If you change passwords, do not forget to notify the users that their passwords have been changed.

Access Rights

When you change the access rights for multiple users at once, be aware that any changes you make will override the current access rights in the users' profiles. This means that the access rights will be reset according to the permissions selected on the Edit Multiple Users screen (adding a single permission to the access rights will replace all existing permissions, not add the new permission to the already existing list).

Advanced

All advanced information can be edited en masse, allowing you to easily manage changes that may occur as a result of structural reorganization, updates to company policies, etc.

Time Off

When you change the time off settings for multiple users at once, be aware that any changes you make to days allowed, "as of" dates, accruals, and reset options will override the current time off settings in the users' profiles. However, you can change the time off assignments individually. This means that selecting or deselecting the check box for a single time off code will either assign or remove the assignment for that time off code only (it will not affect the other time off code assignments). If you need additional help setting up the time off accruals/reset options, refer to the *Time Off Scenarios* section for some examples of how they may be implemented.

E-mail Notifications


You can select or deselect individual e-mail notifications to either enable or disable (respectively) the notifications for the users selected. Changing the setting for a single notification will not affect the other notifications in the users' profiles.

5. When you are finished, you can review your changes by referring to the Changes section at the bottom of the screen. If you are satisfied with the changes, click the Save button to apply them to the profiles for the users you selected.

Deleting a User

You can delete users from Web TimeSheet at any time. Deleting a user removes the user's profile from the database. You can delete a single user or multiple users at one time.

To delete a single user:

1. Click on the **Admin** button at the top of the screen.
2. On the **User Information** screen, click the  next to the name of the user whose profile you wish to delete. Web TimeSheet will confirm that you want to delete a user before removing the user profile from the database. If you are sure you want to delete the user, select Yes when prompted. If you do not want to delete the user, select No to cancel the deletion and return to the **User Information** screen.

To delete multiple users:

1. Click on the **Admin** button at the top of the screen.
2. On the **User Information** screen, select the check boxes next to the users you want to delete. If you want to delete all users, select the check box labeled **Select All** (at the bottom of the list).
3. Click the Delete button to delete the selected users. Web TimeSheet will confirm that you want to delete the users before removing them from the database. If you are sure you want to delete the users, select Yes when prompted. If you do not want to delete the users, select No to cancel the deletion and return to the **User Information** screen.

Time Off Scenarios

The following scenarios provide examples of how you might set up time off codes for your users (or globally). Refer to *Chapter 5 - Advanced Setup Options* for information about setting up global time off codes.

Scenario 1: Vacation Accruals (no expiry)

As of January 1, John Smith accrues 1.25 days per month (this will total 15 days at the end of the year). The accruals occur on the first day of every month, and can increase indefinitely (i.e., the days do not expire).

You can set up John's vacation as follows:

Allowed: [blank] days as of January 1, 2002

Accrue: Monthly on the 1st - 1.25 days

Reset: No Reset

John will begin accruing vacation days on January 1. If he takes any vacation days during the year, the days will be subtracted from the overall total accrued days.

For this scenario, the number of days allowed will not change throughout the year. John's total available days will be noted in "days remaining", both on the **Edit User** screen (under Time Off) and in John's timesheets. The "days remaining" will be calculated as follows:

Total Days Accrued - Total Days Taken (since the "as of" date)

Scenario 2: Vacation Accruals (with expiry)

As of January 1, John Smith accrues 1.25 days per month (this will total 15 days at the end of the year). The accruals occur on the first day of every month. At the end of the year, John loses any days he has not used (i.e., the days expire).

You can set up John's vacation as follows:

Allowed: [blank] days as of January 1

Accrue: Monthly on the 1st - 1.25 days

Reset: Yearly on January 1st - 0 days

John will begin accruing vacation days on January 1. If he takes any vacation days during the year, the days will be subtracted from the overall total accrued days.

For this scenario, the number of days allowed will not change throughout the year. As days are accrued, John's total available days will be noted in "days remaining", both on the **Edit User** screen (under Time Off) and in John's timesheets. The "days remaining" will be calculated as follows:

Total Days Accrued - Total Days Taken (since the "as of" date)

The days allowed will be reset to zero each year on January 1st (the new "as of" date), when John will once again begin accruing vacation days.

Scenario 3: Monthly Flex Days (use it or lose it)

Your organization allows each employee one optional flex day per month. Flex days can not be accumulated, meaning that if an employee doesn't use the flex day in a given month, the day is lost.

You can set up these optional flex days as follows:

Allowed: [blank] days as of January 1

Accrue: No Accrual

Reset: Monthly on the 1st - 1 day

To track the number of days taken or number of days remaining, you must enter the allowed number of days as of a specific date. This information is necessary for Web TimeSheet to know when to begin the calculation.

For this scenario, the "as of" date will change to the first day of the month each time the number of flex days is reset.

Because this scenario describes a company-wide policy, you can set up the flex days at the global level (**Edit Time Off Code** screen). If the policy applies only to specific users, you will need to set up the flex days at the user level (**Edit User** screen).

Scenario 4: Sick Days (tracking the number of days taken)

Your organization does not allocate a specific number of days off for illness; however, you want to be able to track the number of sick days taken to ensure employees are within a reasonable limit. You can track this information by setting up the Sick time off code as follows:

Allowed: [blank] days as of January 1

Accrue: No Accrual

Reset: No Reset

For this scenario, you do not want to set up any specific number of days allowed, nor accruals or reset options. You need only the "as of" date so Web TimeSheet knows the start date for calculating the number of days taken.

Note ...

(Scenario 2) Some organizations have exceptions to the "use it or lose it" rule, such as:

- An employee may be allowed to carry forward up to three unused days to the following year
- An employee may be allowed to carry forward unused days to the following year as long as the days are used within the first quarter

For such cases, a manual update would be required. For more information about manual updates, refer to *Scenario 5: Personal Days (manual update)*.

Accruals do not accumulate and resets do not occur in the past (not retroactive).

If you are implementing accruals on June 1st, for example, you should set up the Allowed days to include all accrued days up to June 1st, and begin the accruals on or after June 1st. The reset date should occur on or after June 1st, as well.

Note ...

The **Add Client** screen may contain additional user defined fields that are either required or optional, depending on your organization's setup. Refer to *Chapter 5 - Advanced Setup Options for further information about setting up User Defined Fields.*

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Scenario 5: Personal Days (manual update)

As of January 1, John Smith's personal days were reset to allow two personal days. During the past six months, John has recorded one day in his timesheets. He currently has one day remaining.

Today John received a promotion and is eligible for one additional personal day per year (totaling three days per year). You can update John's information as follows:

Allowed: Change "2 days as of January 1" to "3 days as of January 1"

Accrue: No Accrual

Reset: Change "Yearly on January 1st - 2 days" to "Yearly on January 1st - 3 days"

Now John is allowed three days and has two days remaining. The one day he has used since January 1 is still included in the calculation.

For this scenario, you **would not** change the "as of" date.

Clients

Clients are customers of your organization to whom you bill time or costs for projects. Customers may be external customers or departments within your organization. You may define multiple clients based on your organization's needs. You should define your clients before setting up projects to eliminate the need to go back and assign the projects to the appropriate client.

Filter Clients

You can view a list of existing clients by clicking on the **Projects** button at the top of the screen and selecting **Clients** from the side menu. On the **Clients** screen, the Basic Filter section provides common fields you may use to limit the displayed client list. To use these filters, enter text in one of the fields and click the Apply button. The screen will refresh with the filtered data.

Add a Client


Adding clients will allow you to track the time and costs for projects funded by external customers or by departments within your organization.

To add a client:

1. Click on the **Projects** button at the top of the screen and select **Clients** from the side menu.
2. Click the Add button on the **Clients** screen.
3. Enter the name of the new client. Additional fields such as code and comments are optional.
4. Select the Add More check box if you wish to add more clients after this one.
5. When you are finished, click the Save button at the bottom of the screen.

Edit a Client


You can modify the details for clients at any time. To edit a client:

1. Click on the **Projects** button at the top of the screen and select **Clients** from the side menu.
2. On the **Clients** screen, click the  next to the appropriate client, or click on the underlined name.
3. On the **Edit Client** screen, modify the client information as necessary.
4. When you are finished, click the Save button at the bottom of the screen.

Delete a Client

You can delete a client only if that client is not associated with any projects.

To delete a client:

1. Click on the **Projects** button at the top of the screen and select **Clients** from the side menu.
2. Select the  next to the appropriate client on the **Clients** screen.
3. Web TimeSheet will confirm that you want to delete a client before removing it from the database. If you are sure you want to delete the client, select Yes when prompted. If you selected the in error, you can select No to cancel the deletion and return to the Clients screen.

If you wish to remove a client that is associated with one or more projects, you may disable the client to prevent further use.

To disable a client, follow the instructions for editing a client and deselect the Enabled check box on the **Edit Clients** screen.

Projects and Tasks

A project is a framework (structure) used to organize workgroup tasks. Projects identify the body of work to be completed by a team within your organization. Projects can have multiple levels and complexities, depending on the needs of your organization.

Filtering Projects

You can view a list of existing projects by clicking on the **Projects** button at the top of the screen and selecting **Projects** from the side menu. On the **List Projects** screen, the Basic Filter section provides common fields you may use to limit the displayed project list. To use these filters, select an item from one or more of the drop-down lists and click the Apply button. The screen will refresh with the filtered data.

To specify more advanced search criteria:

1. Click the Advanced Filter button to display the Advanced Filter section.
2. The Advanced Filter section provides common fields as well as more detailed fields you can use to limit your list of projects. If you enter criteria in the text fields, Web TimeSheet will search for any projects containing the text in the same order you entered it. For example, if you search for “web” in the Project Name field, the search will return any project with “web” in the name.
3. When you are finished entering the necessary search criteria, click the Apply button. The list of projects will refresh based on the criteria you specified.

To restore the original list, click the Reset button. The Reset button restores all filters to their default settings. To apply the default settings, click the Apply button (clicking the Reset button does not automatically apply the restored filters).

Getting Started

Depending on your organization, setting up a new project can be a complex process. The following instructions explain how to set up a basic project. Once you have entered the basic project information, you can use the **Project** screen to add more advanced project information.

1. To begin setting up a new project, click on the **Projects** button at the top of the screen and select **Projects** from the side menu.
2. Click the Add button to create a new project.
3. Enter the name of the new project. A project name is required and should be unique to this project.
4. You may wish to assign a code to the new project. This field is optional.
5. By default, a new project is not associated with any client; however, you may choose a client who will be charged for all billable time entered against the project. Only one client can be assigned to a project.
6. You may assign a default billing rate for this project. If you selected a client, the billing rate is copied from the default rate in the client record. If you did not select a client, the billing rate defaults to \$0.00.
7. Do not base the project on anything (select <None>).
8. Click the Save button when you are finished.

The **Project** screen is automatically displayed after you enter the basic project information. You can use this screen to further define your project.

The **Project** screen is divided into the following sections:

- Project Information
- Billing Rates
- Project Structure
- Project Team
- Allowable Expenses

Whether you create basic or complex projects, always click the Save button on the **Project** screen.

Note ...

Filter criteria are saved during the same Web TimeSheet session; however, basic settings will not transfer to the advanced settings (and vice versa).

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense features are available only if you have a valid license for the Expense module.

Note ...

Once you have set up at least one project, you can use the *Based On* option to copy attributes from one project to another.

Based On copies all project attributes except those entered on the **Add New Project** screen and the project leader, which defaults to the user creating the project.

Clicking the underlined name of the project or a task in the project structure will access the **Edit Project/Edit Task** screen for the project/task directly, rather than take you through the Project Structure list screen.

Do not forget to save a project whenever you make changes.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense features are available only if you have a valid license for the Expense module.

Copying an Existing Project

If you need to create a project with the same characteristics as an existing project, you can use the *Based On* feature to save yourself time when setting up the new project. The *Based On* feature copies all of the following information from an existing project to a new project:

- Advanced Project Information
- Billing Rates (all rates except the default billing rate for the project)
- Project Team (all associated rates except the default project rate)
- Project Structure (Tasks)
- Project/Task Assignments
- Allowed Expenses

Project data that is NOT copied includes:

- Project Name
- Project Code
- Client
- Project Leader
- Default Billing Rate

When you copy a project, the status of the new project will be "Open" (highest level), regardless of whether the existing project has been closed.

Project Information

The Project Information section contains general information about the project including the project name, code, associated client, and project leader. By default, the project leader is the user who creates the project (currently signed on). You can easily assign a different project leader by selecting a different user from the drop-down list. The new project leader can be selected only from users with Project Leader permissions.

Clicking on the underlined project name in the Project Structure section will access the **Edit Project** screen, where you can:

1. Enter a text description to further define your project. This description may be displayed on some reports.

2. Estimate the total hours, total costs and/or total expenses that will be incurred for the project. These estimates can be used to calculate the project progress and view estimated vs. actual values in reports. If your organization uses project/task roll-up, it is recommended that you not enter estimates at the project level; however, if you choose to enter project-level estimates, these estimates will be included in the rolled up values that appear on the **Project Structure** screen.
3. Select a client approver. This user will receive and process timesheet and/or expense approvals based on the settings in the individual users' approval paths.
4. Specify whether project leader approvals are required for this project. If the check box is selected, the project leader will be required to approve time/expenses entered against this project (applies ONLY to timesheets/expenses where the user's approval path includes the project leader).
5. Determine whether time entry is allowed for the project. This option specifies whether the project team members can enter time against the project and applies only to the highest level of the project hierarchy (the parent). Time entry will be determined for each subsequent task separately. If your organization uses project/task roll-up, it is recommended that you not allow time entry for any parent project/task.
6. Specify start and end dates for timesheet entry. These dates limit when users can enter time against the project and apply only to the highest level of the project hierarchy (the parent). The dates do not affect the tasks associated with the project (tasks require separate start and end dates). If no dates are entered, the project will be available in users' timesheets indefinitely.
7. Specify the expense incur start and end dates. These dates limit when users can incur expenses against the project. If no dates are entered, expenses can be incurred against the project at any time.
8. Change the project status. Closing the project will disable it from future use, preventing further time/expense entry against the project and all subsequent tasks. Closing a project is not permanent; you can re-open it at any time.

9. Specify whether this project allows billable time, non-billable time, or both. This field determines how time is processed for the project and how the project is displayed in users' timesheets. If you allow both billable and non-billable time for this project, users will be required to choose the billing when they enter information in their timesheets. For a better understanding of the relationship between billing options and timesheets, refer to *Rates, Billing, and Timesheets*. To "turn off" billing information refer to System Preferences.
10. Create project assignments for this level of the project (highest level). Assignments allow you to specify which users and/or groups can enter time/expense for the project. Assignments can be explicit, which means the user or group is directly allowed access to the project, or implicit, which means the user or group is allowed access as a member of a larger group. To create project assignments, refer to *Creating Assignments*, below.
11. When you are finished adding/editing the additional project information, click the Save button.

Creating Assignments

To create project assignments:

1. Filter the list of available users/groups to display the individuals you want to assign to the project. You can perform a user specific search by last name or filter the list by department. The filter defaults to the project team. If you have created a project team, all team members will, by default, be listed in the Allow list box (not in the Available list box). If no users/groups have been assigned to the project team, all list boxes will be blank, and you will need to change the Department filter before continuing.
2. To allow users/groups access to the project, select the appropriate name in the Available list box and click the Allow button. The name will be added to the Allowed list box. All names added to the Allowed list box are automatically added to your project team.
3. If you added a group (department or <All>), but want to deny a specific member of the group, select the name of the individual group member in the Available list box and

click the Deny button. The name will be added to the Denied list box. All names added to the Denied list box *are not* automatically added to the project team. The project team contains only those users/groups who have been explicitly allowed access to the project/task.


You can remove names from both the Allowed and Denied list boxes by selecting the name and clicking the Remove button. To move names between the Allowed and Denied list boxes, select the name and clicking the Allow or Deny button, as needed.

When you are finished, make sure you click the Save button to save the assignments.

Editing An Existing Project

Web TimeSheet offers multiple ways for editing projects and project-related information. You can edit projects one-by-one or en-masse using the mass update options. Refer to the *Editing Multiple Projects* section for further information about editing projects en-masse.

To edit a single project:

1. Click on the **Projects** button at the top of the screen and select **Projects** from the side menu.
2. Click the  next to the project you want to edit, or click on the underlined project name.
3. Amend the project information as necessary.
4. If you are editing project or task assignments, you may choose to apply your changes to the sub-tasks as well. You can either apply the changes you've made, or reset the assignments for all sub-tasks. Resetting the assignments for all sub-tasks will replace the existing assignments with the assignments for the project or parent task. Select the appropriate check box to specify how you want to apply your changes (this is an option - you are not required to change the sub-task assignments).
5. When you are finished editing the project, click the Save button to save the project. Always remember to save the project. If you do not save the project, all your changes will be lost.

Note ...

If you do not have permission to edit specific types of project information, you may not see all of the editable fields available for mass editing projects.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

User group features are available only if you have a valid license for the User Grouping module.

Expense features are available only if you have a valid license for the Expense module.

Note ...

If you do not have permission to edit specific types of project information, you may not see all of the editable fields mentioned.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Editing Multiple Projects

Mass editing project information is useful if you have to make the same change to many projects. For example, if a client assigns a new representative, projects associated with that client will need to be updated to reflect the new client approver. You can update all the projects at once using the Mass Update feature (rather than change the client approver in each individual project).

Project specific fields are unique to each project (meaning they cannot be, or are unlikely to be the same for multiple projects). These fields cannot be edited using the Mass Update feature. Such fields include Project Name and Project Code.

All other information associated with the project can be changed for multiple projects at once, including assignments and expenses.

To edit information for multiple projects:

1. Click on the **Projects** button at the top of the screen and select **Projects** from the side menu.
2. On the List Projects screen, select the check boxes corresponding with the projects you wish to edit. You may need to filter the list to locate the appropriate projects.
3. Click the Projects button at the bottom of the list. The **Edit Multiple Projects** screen is displayed.
4. Modify the necessary project information, keeping in mind that any changes you make on this screen will override the existing information for the projects you selected.
5. If you are editing project assignments (allow/deny team members the ability to enter time against the parent project in their timesheets), you may choose to:
 - Add to project assignments
Adds the new assignments to the existing project assignments (does not affect the existing assignments)
 - Add to project and all sub-task assignments
Adds the new assignments to the existing project and sub-task assignments (does not affect the existing assignments). If you choose to add to project and

sub-task assignments, be aware that the process may take some time, depending on the size of the projects you are editing.


- Replace project assignments
Replaces the existing project assignments with the new assignments (overwrites all existing assignments for the project *only*)
 - Replace project and all sub-task assignments
Replaces the existing project and sub-task assignments with the new assignments (overwrites all existing assignments for both the project *and* all sub-tasks). If you choose to replace project and sub-task assignments, be aware that the process may take some time, depending on the size of the projects you are editing.
6. You can select or de-select individual expenses to either allow (checked) or deny (unchecked) users the ability to enter expenses against the selected projects. By default, all expenses are shown with a gray check box. If you make a change and wish to cancel it, simply continue selecting the check box until it returns to the gray state. This gray state indicates that no change will be made.
 7. When you are finished editing the projects, click the Save button to save the new information.
 8. Web TimeSheet will confirm your changes before committing the information to the database. After reviewing the changes, select the Yes button to save the projects, or the No button to cancel your changes.

If you do not have permission to edit specific types of project information, you may not see all of the editable fields mentioned above.

Deleting Projects

You can delete a project(s) if no time has been entered against it. If there is time entered against the project, you can close the project. Closing a project prevents further time entry against that project and all its associated tasks.

You can delete a single project or multiple projects at once. To delete a single project:

1. Click on the **Projects** button at the top of the screen and select **Projects** from the side menu.
2. Click the  next to the appropriate project on the **List Projects** screen.
3. Web TimeSheet will confirm that you want to delete a project before removing it from the database. If you are sure you want to delete the project, select Yes when prompted. If you do not want to delete the project, select No to cancel the deletion and return to the **List Projects** screen.

To delete multiple projects at once:

1. Click on the **Projects** button at the top of the screen and select **Projects** from the side menu.
2. Select the check boxes next to the projects you wish to delete. If you want to delete all projects, select the check box labeled **Select All** (at the bottom of the list).
3. Click the Delete button at the bottom to delete the selected projects. Web TimeSheet will confirm that you want to delete the projects before removing them from the database. If you are sure you want to delete the projects, select Yes when prompted. If you do not want to delete the projects, select No to cancel the deletion and return to the **List Projects** screen.


Managing Tasks

Projects can contain many tasks and up to ten hierarchal levels. All tasks in the project hierarchy inherit their billing rates, team members, and expenses from the parent project. All tasks have the same billing rates and allowable expenses as the parent project; however, you can specify at the task level who can enter time against the task, and whether the task can have billable time, non-billable time, or both. As with projects, if you allow both billable and non-billable time, users will be required to choose the appropriate billing option when they enter information in their timesheets.

All task information is accessed from the **Project Structure** section of the **Project** screen.

Adding Tasks to a Project

To add a task to a project:

1. Click the Edit button in the upper right corner of the Project Structure section.
2. On the **Project Structure** screen, click the  next to the project name to add a new task.
3. Enter the task name and any additional information necessary for this task. If your organization uses project/task roll-up, the task estimates may be automatically calculated based on the estimates for any subsequent tasks. It is recommended that you not allow time entry for the parent tasks.
4. Task status controls both this task and all subsequent tasks. If you close this task, any subsequent tasks also will be closed. If you re-open the task, all subsequent tasks will be re-opened.
5. Select a billing option. The billing option determines what kind of time can be entered against this task. For example, if this task is always billable, select "Billable" to prevent users from entering any non-billable time against the task. Selecting "Billable" also will ensure that all time entered for the task is billed at the appropriate project rates. The same is true for "Non-billable" - this option will prevent users from entering billable time and will ensure that time entered against the task is not included in the amount charged to the client.
6. If you are using task level assignments, specify which users/groups are allowed access to the task (refer to Task Assignments, below).
7. Click Add More if you want to add multiple tasks after this one. Any tasks added using this feature will be at the same hierarchal level as the current task.
8. When you are finished defining this task, click the Save button to save the task and return to the **Project Structure** screen.

Now that you have created the high-level task(s), you can define sub-tasks. Sub-tasks create additional hierarchal levels. To add a sub-task:

Note ...

Clicking the underlined name of the task in the Project Structure section will access the **Edit Task** screen directly, rather than take you through the **Project Structure** list screen.

If you select "Both" as the billing option for a task, users will be responsible for selecting the correct billing option within the timesheet itself.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.


Do not forget to save a project whenever you make changes.

Note ...

Clicking the underlined name of the task in the Project Structure section will access the **Edit Task** screen directly, rather than take you through the **Project Structure** list screen.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Do not forget to save a project whenever you make changes.

1. Click the  next to the name of the parent task on the Project Structure screen.
2. Repeat the steps for adding a task. Do not forget to click the Save button when you are finished.

Task Assignments


When you create a new task in the project structure, by default, all the assignments for the project (or parent task) will be copied to the new task; however, the assignments can be changed at the task level. This means that once saved, the assignments for the task will remain unaffected by changes to the assignments at higher levels in the project structure.

To change the task assignments:

1. To grant access to users/departments not already displayed in the Allowed list box, select the appropriate name in the Available list box. You may need to change the Department or User Group filter to locate the appropriate names. When you are ready, click the Allow button to add the name to the Allowed list box. All names added to the Allowed list box are automatically added to your project team.
2. If a department (or <All>) has been added to the Allowed list box, but you want to deny a specific member of the department, select the name of the individual user in the Available list box and click the Deny button. The name will be added to the Denied list box. All names added to the Denied list box are not automatically added to the project team. The project team contains users/groups who have been explicitly allowed access to the project/task.
3. If you want to remove users/groups from either the Allowed or Denied list box, select the appropriate name and click the Remove button. You can also move names between the Allowed and Denied list boxes, as necessary.

Sort Tasks


You can change the order of tasks within the project structure, provided they share the same parent task. To sort tasks:

1. Click the Edit button in the upper right corner of the Project Structure section.
2. On the **Project Structure** screen, click the  next to the task for which you want to sort the sub-tasks. The **Sort Tasks** screen is displayed.

3. Select a task and use the up and down arrows to move the task up or down in the list.
4. Click the Save button to save the task order and return to the **Project Structure** screen.
5. Click the OK button on the **Project Structure** screen to return to the main **Project** screen.

Edit an Existing Task

To edit an existing task:

1. Click the Edit button in the upper right corner of the Project Structure section.
2. On the **Project Structure** screen, click the  next to the task you want to edit, or click on the underlined task name.
3. Amend the task information as necessary.
4. If you are editing the task assignments for a parent task, you may choose to apply your changes to the sub-tasks as well. You can either apply the latest changes, or replace the existing assignments for all sub-tasks. Replacing the existing assignments for all sub-tasks will delete the existing sub-task assignments and replace them with the parent task's assignments. Select the appropriate check box to specify how you want to apply your changes (check boxes are *optional*).
5. When you are finished editing the task, click the Save button to save your changes.
6. Click the OK button on the **Project Structure** screen to return to the **Project** screen.

Editing Multiple Tasks

When you use the Mass Edit option to modify tasks, you will be able to modify general task information (name, description, estimates, etc.) and add/edit task assignments for multiple tasks within the same project or across multiple projects. You will not be able to explicitly remove task assignments; however, you can *deny* the team member(s) access, which will prevent them from entering time against the tasks.

To edit task information across multiple projects:

1. Click on the **Projects** button at the top of the screen and select **Projects** from the side menu.

2. On the **List Projects** screen, select the check boxes corresponding with the projects you wish to edit. You may need to filter the list to locate the appropriate projects.
3. Click the Tasks button at the bottom of the list. The **Choose Tasks** screen is displayed.
4. The filters at the top will allow you to limit the tasks displayed in the list below. When you enter/select your search criteria, click the Apply button to refresh the list of tasks. If you want to return the list to its original state, simply click the Reset button and apply your changes. The list will refresh again.

Note that if you have selected projects which, combined, have more than 5,000 tasks, you will not be able to select tasks for all projects at once; rather, you will need to filter and select the appropriate tasks project by project.

5. From the displayed list of tasks, select the corresponding check box next to each task you wish to modify. If you are unsure whether you are selecting the correct task, click the underlined task name to view a preview of the information associated with the task. You may want to expand or collapse different parts of the hierarchy to find the tasks more easily. Click the >> button to add the tasks to the list of tasks to edit.
6. When you are finished selecting tasks, click the Continue button to move on to the **Edit Multiple Tasks** screen.
7. If you are editing task assignments (allow/deny team members the ability to enter time against the task in their timesheets), you may choose to:
 - Add to task assignments
Adds the new assignments to the existing task assignments (does not affect the existing assignments)
 - Replace task assignments
Replaces the existing task assignments with the new assignments (overwrites all existing assignments for the selected tasks)
8. If you make a mistake, you can select the “No Change” option to cancel any assignment changes.

9. If you are sure about the changes you are making, and do not wish to see a confirmation message (which provides a summary of the changes) when you are finished, click the check box that reads, “Skip confirmation screen. Any issues will not be displayed.”
10. When you are finished editing the task information, click the Save button to apply your changes. Web TimeSheet will confirm that you want to apply your changes. To save your changes, click the Yes button.


If you wish to edit more tasks from the same set of projects, select the *Choose another set of tasks* check box before clicking the Yes button, which will return you to the **Choose Tasks** screen.

Clicking the No button will return you to the **Edit Multiple Tasks** screen without saving your changes.

Deleting Tasks

You can delete tasks at all levels of the hierarchy. Deleting a parent task will remove both the parent and all sub-tasks from the database.

To delete a task:

1. Click the Edit button in the upper right corner of the Project Structure section.
2. On the **Project Structure** screen, click on the  next to the task you want to delete. Web TimeSheet will confirm that you want to delete a task before removing it from the database. If you are sure you want to delete the task, select Yes when prompted. If you do not want to delete the task, select No to cancel the deletion and return to the **Project Structure** screen.

Rates and Billing

When you set up a project, you define the rates to be used for the project, assign a project team and associate rates with each team member, and specify whether the project can have billable time, non-billable time, or both.

Note ...

You cannot delete tasks for which time is entered in users' timesheets. You can, however, close a task to prevent further time entry.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Do not forget to save a project whenever you make changes.

Note ...

If there is a client associated with the project, the client's rate will automatically be used as the default project rate (this rate can be overridden at the project level).

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Do not forget to save a project whenever you make changes.

How you set up your project directly affects what users will see on their timesheets. A task may allow both billable and non-billable work, or a user may have multiple rates. If a user has multiple rates, that user will be required to select the appropriate rate when entering time against the project. If a task allows both billable and non-billable work, the user will be required to select the appropriate billing option when entering time. There may be some instances where these two situations are combined (see *The Relationship Between Rates, Billing, and Timesheets* at the end of this chapter).

Once a project is set up with the proper rates, project team members can enter time against the project. The billing amount for the project is calculated based on the project rates and the time entered. The billing amount is also affected by the billing setup for each task associated with the project.

The following types of rates can be applied to a project:

- The **project** rate is a default billing rate for the entire project. The project rate automatically applies to all time entered against the project and its associated tasks. This means that when you assign a project team, each team member will, by default, use the project rate.
- A **user** rate is a specific rate defined for a particular member of the project team. The user rate applies only to the selected user and is specific to the project and its associated tasks.
- A **department** rate is a specific rate defined for a department that has been assigned to the project team. A department rate is applied to all users within that department, unless a member of the department is also assigned to the team as an individual user. In this case, the rate specified for the user will override the rate for the department.
- **Roles** are used to identify types of work that are charged at specific rates. A role can describe a specific action/function or a level of expertise within the project team. Roles are initially created outside of the project, then assigned to the project and appropriate team members.

- **Multiple Rates** are used to differentiate between a user's responsibilities. Keep in mind that when you assign multiple rates to a user, that user will be required to choose the correct rate when entering time against the project.

All rates are owned by the project. Changes made outside of the project environment do not affect the rates already assigned to the project. To apply updates/changes to the rates for a specific project, you must modify rates from within the project itself, or use the Mass Update option to modify rates across multiple projects.

Roles

You must define roles before the project is created. Roles are defined at a global level outside of the project itself. Once you have created the roles, you can assign them to a project and then, individually to project team members. Whomever creates the project determines which roles are valid for the project. Only roles assigned to the project can be applied to work done on the project.

The following scenarios provide some examples of how you might implement roles.

Scenario 1

You are the project leader for a web design project. You and the client have agreed that all time for the project will be charged at a rate based on the action/function fulfilled by team members. This project will require fulfillment of the following functions at the specified rates:

- Project Management - \$125.00/ hour
- Web Site Design - \$70.00/hour
- Graphic Design - \$50.00 /hour

Scenario 2

You are a project leader at a large manufacturing company that completes many interdepartmental projects. Because each project team usually consists of an entire department, charges are incurred based on each team member's level of expertise.

To simplify interdepartmental billing, your company has categorized employees as follows:

- Junior Level - \$75.00/hour
- Intermediate Level - \$100/hour
- Senior Level - \$150/hour


Adding and Editing Roles

You will have to add roles at the global level before you can assign them to a project. To add a role:

1. Click on the **Projects** button at the top of the screen and select **Roles** from the side menu.
2. Click the Add button on the **Roles** screen and enter the name and the default billing rate for the new role. When the role is assigned to a project, the default billing rate will be copied to the project (the rate can be edited from within the project).
3. When you are finished, click the Save button at the bottom of the screen.

You can edit a role at any time. Because rates are owned by the project and cannot be changed from outside the project, changing a role or role rate at the global level (outside the project environment), will affect only those projects created after the change is made.


To edit a role:

1. Click on the **Projects** button at the top of the screen and select **Roles** from the side menu.
2. Click the  next to the role you want to edit, or click on the underlined role name. Amend the role information and click Save when you are finished.

Deleting Roles

If your organization no longer uses a specific role, you can delete the role as long as no time has been entered against it.

To delete a role:

1. Click on the **Projects** button at the top of the screen and select **Roles** from the menu at the left.
2. Select the  next to the appropriate role on the **Roles** screen. Web TimeSheet will confirm that you want to delete a role before removing it from the database. If you

are sure you want to delete the role, select Yes when prompted. If you do not want to delete the role, select No to cancel the deletion and return to the **Roles** screen.

Assigning Roles to a Project



Roles must be added to a project before time can be billed at the role rate(s). Roles are added to a project from the **Project** screen:

1. Click the Roles button in the upper right corner of the **Billing Rates** section.
2. From the list of roles, select the roles you want to add to the project. Hold down the *Ctrl* key to select multiple roles.
3. Click the >> button to add the selected roles to the project.
4. When you are finished, click the Save button to return to the **Project** screen.

Editing Project and Role Rates

To edit the project and role rates, you must access the rate history from the Billing Rates section of the **Project** screen.

To access the rate history:

1. Click on the **Projects** button at the top of the screen and select **Projects** from the side menu.
2. Click the  next to the project for which you want to view rates, or click on the project's underlined name.
3. In the Billing Rates section of the **Project** screen, click the  to view the rate history for a specific rate/role. The **Rate History** screen is displayed, from which you can add, edit, or delete rate values.

Adding Rates to the Rate History

To add a rate value to rate history:

1. Click the Add button on the **Rate History** screen.
2. Enter the currency, rate value, and effective date for the new rate.
3. Click the Save button to add the new rate to the project/role rate history.

Note ...

You can delete a role only if there is no time entered against that role in users' timesheets. If time is entered against the role, you can disable it using the edit function.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Do not forget to save a project whenever you make changes.

Note ...


Rate values for project and role rates can be modified from the **Billing Rates** section on the **Project** screen.

To remove a rate assignment, follow the instructions to assign rate types and deselect the check box for the rate you want to remove.

Removed assignments are displayed in gray text on the **Rates** list screen.


Editing Historical Rate Values

To edit an existing rate value:

1. Click the  next to the rate you want to modify on the **Rate History** screen.
2. Make the necessary changes, noting that if you change the effective date, a new value will be added to the rate history.
3. Click the Save button to save your changes and return to the **Rate History** screen.

Deleting Rate Values

To delete a rate value:

1. Click the  next to the rate you want to delete on the Rate History screen.
2. Web TimeSheet will confirm you want to delete the rate before removing the value from the rate history. If you are sure you want to delete the rate, select Yes when prompted. If you do not want to delete the rate, select No to return to the Rate History screen.

The Project Team

The project team is the group of users who can work on the project or its associated tasks. Each member of the project team is assigned a rate that will be used to calculate the cost incurred for the time that user spends working on the project.

Project teams are assigned from the **Project** screen.

Creating Your Project Team

To assign a project team:


1. Click the Edit button in the upper right corner of the **Project Team** section.
2. From the list of available project team members, select the users and/or departments who will be working on the project. Hold down the Ctrl key to select multiple team members. You may need to change the Department or User Group filter to locate the appropriate names.
3. Click the >> button to add the selected users/departments to the project. When you are finished, click the Save button to return to the **Project** screen.

Assigning Rates to a Project Team

By default, all members of the project team use the project rate. You can change this rate on a user-by-user basis from the **Project Team** section, either by assigning one or more rate types (user/department rate, roles) or by adding a new user/department rate value.

Assigning Rate Types


Assigning rate types allows you to apply specific rates to an individual project team member. Rate types include the project rate (assigned by default to all team members), any role rates you have added to the project, and a user/department rate. The user/department rate, when assigned for the first time, requires setup of a rate value and effective date. If you want to assign **only** a user/department rate, you can bypass the steps below and follow the instructions for adding a user/department rate.

1. After assigning the project team, click the  next to the team member for whom you want to assign rates. The **Rates** list screen displays a list of all rates assigned to that team member.
2. Each member, by default, is assigned the project rate. To assign a different rate, click the Assign Rates button and select the corresponding check boxes for all rates you want to assign.
3. When you are finished, click the Save button to save the rate assignments and return to the **Rates** list screen. If you assigned a user/department rate, you may be required to specify a rate value before returning to the **Rates** list screen (continue to Step 4).
4. On the **Add User/Department Rate** screen, enter the hourly rate and effective date for the user/department rate. When you are finished, click the Save button to return to the **Rates** list screen. All your new rates will be displayed in the list.

Adding a User/Department Rate:

Adding a user/department rate allows you to set up a specific rate value for a single team member. Adding a new rate value automatically assigns the user/department rate to the team member (alleviating the need to assign rates separately). If you wish to assign multiple rate types at once, follow the instructions for assigning rate types above).

To add a single user/department rate:



1. After assigning the project team, click the  next to the team member for whom you want to add a user/department rate. The **Rates** list screen displays a list of all rates assigned to that team member.
2. Click the Add User Rate button (or Add Department Rate button, depending on the selected team member) to add a new rate.
3. On the **Add User/Department Rate** screen, enter the hourly rate value and effective date for the new rate. To add more user/department rates after this one, select the Add More check box.

Click the Save button when you are finished to save the rate and return to the **Rates** list screen. The first time you add a user/department rate, the rate will automatically be assigned to the user on the **Assign Rates** screen. If you remove the assignment, then later add another user/department rate, you will need to manually assign the rate type to the team member (see assigning rate types above).

Deleting a User/Department Rate

Deleting a user/department rate removes that rate value from the team member's list of active rates. This means that any time entered against the project will now be billed at a different rate. For example, Tom Hill has two user rates - the initial user rate of \$50, and a second user rate of \$75 as of February 1, 2004. If the project leader deletes Tom's user rate of \$75, all of Tom's time for the project will be billed at the initial rate.

To delete a user/department rate:

1. Click the  next to the team member for whom you want to delete a user/department rate. The **Rates** list screen displays a list of all rates assigned to that team member.
2. Click the  next to the user/department rate you want to delete. Web TimeSheet will confirm that you want to delete the rate before permanently removing it. If you are sure you want to delete the rate, select Yes when prompted. If you do not want to delete the rate, select No to cancel the deletion and return to the **Rates** list screen.

Modify Rates Across Multiple Projects

To edit rates across multiple projects:

1. Click on the **Projects** button at the top of the screen and select **Projects** from the side menu.
2. On the **List Projects** screen, select the check boxes corresponding with the projects you wish to edit. You may need to filter the list to locate the appropriate projects.
3. Click the Rates button at the bottom of the list. The **List Rates** screen is displayed, containing a complete list of available rates. Note that user names identify user rates, and department names identify department rates. Each rate is listed with its associated project.
4. You may wish to filter the list to locate the appropriate rates. To filter the list, select a specific rate from the Rate Name drop-down list. For more advanced search criteria, click the Advanced Filter button. After entering the necessary values, click the Apply button to refresh the list of rates.

To restore the list, click the Reset button (resets the filters to their original settings), then click the Apply button. The list will refresh in its original state (without any filters).

5. From the list of available rates, select the rates you wish to edit and click the Change button. You may select as many rates as necessary; however, please note that you will be applying a single value to all the rates you select.
6. On the **Change Rates** screen, enter the new hourly rate and effective date for the rates you selected.
7. When you are finished, click the Save button. Web TimeSheet will confirm that you want to apply your changes. To save your changes, click the Yes button.

If you wish to edit more rates from the same set of projects, select the *Choose another set of rates* check box before clicking the Yes button, which will return you to the **List Tasks** screen.

Clicking the No button will return you to the **Change Rates** screen without saving your changes.

Note ...

To modify a user/department rate, click the edit icon next to the appropriate rate on the **Rates** list screen. Project and role rates can be modified from the **Billing Rates** section on the **Project** screen.

Initial rates cannot be deleted.

Note ...

The Select All check boxes at the bottom of the **Assignments** screen allow you to allow or deny access to all tasks in the project structure.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Do not forget to save a project whenever you make changes.

User group features are available only if you have a valid license for the User Grouping module.

Managing Assignments for the Project Team

The **Assignments** screen allows you to manage the *explicit* project/task assignments for individual project team members, where you can quickly and easily adjust a team member's assignments without going through the project structure task by task. *Implicit* assignments, which allow a team member access as part of a larger group, are not shown on the **Assignments** screen.

To manage assignments for a project team member:

1. Click on the underlined name of the project team member in the Project Team section.
2. On the **Assignments** screen, expand/collapse the various levels of the project structure to view the individual task assignments for the selected team member.
3. The Allow check box indicates whether the team member has been explicitly allowed access to the task, meaning the team member has been directly added to the list of task assignments. If you want to explicitly allow the team member access to a specific task, select the Allow check box for that task.
4. The Deny check box indicates whether the team member has been explicitly denied access to the task, meaning the team member has been directly added to the list of denied users/groups for that task. If you want to explicitly deny the team member access to a specific task, select the Deny check box for that task.
5. To remove an explicit assignment (either allow or deny) for a task, clear the appropriate check box. The team member will be removed from the list of allowed/denied users for that task.
6. When you are finished editing the project team member's task assignments, click the Save button to save your changes.

Managing Assignments Across Multiple Projects

You can manage a single team member's assignments across multiple projects using the Mass Update feature. The Mass Update feature will allow you to allow/deny a user access to any or all of the tasks within a group of selected projects (including the projects themselves, if applicable).

For example, if your organization has just hired a new employee, you can assign that employee to all appropriate projects and tasks en masse, eliminating the hassle of opening each project and modifying task assignments individually.

To manage a user's assignments across multiple projects:

1. Click on the **Projects** button at the top of the screen and select **Projects** from the side menu.
2. On the **List Projects** screen, select the check boxes corresponding with the projects you wish to edit. You may need to filter the list to locate the appropriate projects.
3. Click the Team button at the bottom of the list.
4. On the **Manage Team Member** screen, select the name of the user for whom you wish to modify assignments. The list contains all users in the system.
5. Now select the rate you would like to use for the selected team member. The rate you choose will be applied to any projects in which the user is not currently assigned a rate. If you choose to apply a user rate (or department rate, if you are editing assignments for a department), you will need to enter the rate value.
6. Before you begin modifying the team member's assignments, you may wish to filter the list to locate the appropriate tasks. Filtering is especially valuable if the user is working on the same task across multiple projects (e.g., Web Design). To filter the list, enter/select the necessary information from the fields provided and click Apply button to refresh the list.
7. Now look at the team member's task assignments. You can expand/collapse the various levels of the project structure to view the individual task assignments, or use the Expand All/Collapse All options show or hide everything at once.
8. The Allow check box indicates whether the team member has been explicitly allowed access to the task, meaning the team member has been directly added to the list of task assignments. If you want to explicitly allow the team member access to a specific task, select the Allow check box for that task.

9. The Deny check box indicates whether the team member has been explicitly denied access to the task, meaning the team member has been directly added to the list of denied users/groups for that task. If you want to explicitly deny the team member access to a specific task, select the Deny check box for that task.
10. To remove an explicit assignment (either allow or deny) for a task, clear the appropriate check box. The team member will be removed from the list of allowed/denied users for that task.
11. When you are finished editing the team member's task assignments, click the Save button to save your changes. Web TimeSheet will confirm your changes before saving them to the database. To save your changes, click the Yes button. To cancel your changes, click the No button to return to the previous screen.

Note ...

Select the "Manage Another Team Member" check box on the confirmation screen to reload the Manage Team Member screen after the current data is saved. You can then repeat the process for another user.

The Relationship Between Rates, Billing, and Timesheets

It is very important that you understand the relationship between project rates, project billing options, and users' timesheets. Because the billing amount for a project is calculated based on the project rates and the time entered against the project by each member of the project team, you want to make sure that you set up the project effectively.

Remember that when you set up a project, you define the rates to be used for the project. You also assign a project team, associate rates with each team member, and specify whether the project can have billable time, non-billable time, or both. Each piece directly affects the others.

Refer to the on-line Help system for detailed relationship scenarios. This information can be accessed from the main Help page by selecting **Important Concepts**, clicking on the **Rates and Billing** topic, and following the link for *Rates, Billing, and Timesheets*.

Chapter 5 - Advanced Setup Options

Note ...

Some e-mail notifications include an option to "Attach Offline TimeSheet". This option is used to attach an offline timesheet form to the e-mail notification, and is available only if you have a valid license for the Offline TimeSheet module.

You can edit your e-mail server options from the **System Preferences** screen. Refer to *Chapter 11 - System Configuration* for further information about system preferences.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Introduction

This chapter explains additional setup options that are not required to run Web TimeSheet. These options will provide a higher level of flexibility for your implementation, including a more comprehensive reporting system.

The advanced setup options include:

- E-mail notifications/Broadcast Messages
- Approver Types
- Approval Paths
- Currencies
- Departments
- Employee Types
- Expense Codes
- Payment Methods
- Tax Codes
- Time Off Codes
- Disclaimers
- User Defined Fields
- User Groups

E-mail Notifications


Web TimeSheet provides many predefined e-mail notifications that remind users to complete their responsibilities. E-mail notifications can be sent automatically at the end of each period.

Each e-mail notification can be customized to fit your organization's needs. You can edit e-mail information or disable certain e-mails. E-mail notifications can be disabled for specific users (from the user profile) or system wide.

Edit an E-mail Notification

You can edit the information included in an e-mail notification or you can disable the notification. E-mail notifications may contain tags that batch information into a list (miniature report) within the e-mail notification. These tags are listed at the bottom of each e-mail notification template with a definition and can be added or removed from a notification, depending on the needs of your organization.

To edit a specific e-mail notification:

1. Click on the **Admin** button at the top of the screen and select **E-mail Notifications** from the side menu.
2. Click the  next to the notification you wish to change.
3. You can edit the following fields:
 - **Enabled**
Enables the notification system wide; however, you can disable a notification at the user level from within the user profile (refer to Chapter 4 - Getting Started for further information about the user profile).
 - **Reply to**
Specifies what e-mail address will receive users' replies to e-mail notifications.
 - **Subject**
Specifies what text will appear in the subject field when a user receives the notification.
 - **Body**
Determines what information is provided in the notification. To use any of the available tags, enter the tag code in the e-mail text where you want a list to appear. To remove a tag, highlight and delete it.
 - **Send message/At this hour**
Specifies when the notification will be sent. This option is only available for some of the e-mail notifications.
4. When you are finished editing a notification, click the Save button at the bottom of the screen.

Note ...

You can customize any or all e-mail notifications provided with Web TimeSheet.

Batch notifications are e-mail notifications that notify the appropriate supervisors, project leaders, and/or clients when timesheets are overdue or waiting for approval, and when approvals are due or overdue. Each batch e-mail contains a list of associated users.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense notifications are available only if your Web TimeSheet license includes the Expense module.

| Notification | When it is Sent |
|--|--|
| Timesheet is due | Sent to timesheet users on the timesheet due date set up by the system administrator. |
| Timesheet is overdue | Sent a specified number of days after the timesheet due, to users who have not submitted their timesheets as of the due date. Notification is sent either one time, or daily until timesheet is submitted (depends on System Preferences). |
| Timesheet is waiting for approval | Sent to approvers whenever timesheets are submitted for approval. |
| Timesheets are overdue (Batch)* | Sent to supervisors a specified number of days after the timesheet due date. Contains a list of users who have overdue timesheets. |
| Timesheets are waiting for approval (Batch)* | Sent to timesheet approvers a specified number of days before the approval due date. Contains a list of users whose timesheets require approval (by that approver). |
| Timesheet approvals are due (Batch)* | Sent to timesheet approvers on the timesheet approval due date set up by the system administrator. Contains a list of users whose timesheets require approval (by that approver). |
| Timesheet approvals are overdue (Batch)* | Sent to timesheet approvers a specified number of days after the approval due date. Contains a list of users whose timesheets were not approved on time (by that approver). |
| Timesheet is approved | Sent to timesheet users whenever their submitted timesheets are approved. |
| Timesheet is rejected | Sent to timesheet users whenever their submitted timesheets are rejected. |
| Expense is waiting for approval | Sent to expense approvers whenever an expense is submitted for approval (by that approver). |
| Expense approvals are due | Sent to expense approvers on the expense approval due date set up by the system administrator. |
| Expense approvals are overdue | Sent to expense approvers a specified number of days after the expense approval due date. |
| Expense is approved | Sent to expense users whenever their submitted expenses are approved. |
| Expense is rejected | Sent to expense users whenever their submitted expenses are rejected. |
| Welcome message | Sent to new users of Web TimeSheet (once). Contains information about accessing the system. |
| Timesheet modified | Sent to timesheet users when their timesheets are modified by the approver(s). |
| Expense modified | Sent to expense users when their expense sheets are modified by the approver(s). |
| New Timesheet Period has started | Sent to timesheet users to notify them when a new timesheet period has begun. |
| Timesheet Assignments Modified | Sent to timesheet users to notify them when their task assignments have changed (both additions and removals). |
| Daily Reminder - Fill in Timesheet | Sent to timesheet users daily to remind them to fill out their timesheets. |

Broadcast Messages

You may broadcast e-mail messages to any or all users in your system. Broadcasting messages is an effective way to notify users of system upgrades, timesheet changes, project status, or news about your organization.

To broadcast an e-mail message:

1. Click on the **Admin** button at the top of the screen and select **Broadcast** from the side menu.
2. Select the appropriate client or department to which the e-mail will be sent. You can select a single client or department, or all clients and departments. Make sure you specify whether the message is sent to subsidiary departments, as well.
3. Identify the party sending the message (for example, you may wish to use your company name or domain name). You can enter an e-mail address in the Reply To field.

Note ...

When you change the approver or permissions for an approver type, it is recommended that you first ensure that all timesheets/expense sheets have completed their approval paths. Changing these approver type attributes could hold up the approval process for any timesheets/expense sheets that are in the middle of the approval process.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense features are available only if you have a valid license for the Expense module.

4. Enter the subject and body of the broadcast message. When you are finished, click the Send button at the bottom of the screen. Your message will be sent immediately.

Approver Types

Approver types identify the individuals who will be approving users' timesheets and expenses. You can create many different approver types, each of which will have a specific approval function within the approval path.

Approver types ultimately define an approver's relationship to the user's timesheet. An approver type can be related to the user's timesheet (e.g., supervisor), specific projects/tasks within the timesheet (e.g., project leader), or to the time off section of the timesheet. It is the approver's relationship with the timesheet that determines the kind of information for which the approver will be responsible during the approval process.

Each approver type can be set up to use either the approver's default (user profile) permissions, or custom permissions created specifically for that approver type.

Once created, an approver type can be assigned to any approval path.

Add an Approver Type

To add an approver type:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **Approver Types** and click the Add button on the **Approver Types** list screen.
3. Enter the name and description of the approver type. Make sure you assign a name that clearly identifies the function of the approver type.
4. Specify the approver associated with this approver type. The approver may be the supervisor, project leader, client representative, or a user that you name. The approver you select will determine how the approver is related to the timesheet.

5. Now specify whether you would like to override the approver's permissions specifically for this approver type. If you do not choose to override, the approver type will use the specific user's existing permissions (access rights in the user profile).


For example, John Smith is supervises a staff and has supervisor permissions already set up in his user profile. If you want John Smith to approve all time for his staff, but also time off (and only time off) for everyone in the company, you will need to set up a special approver type specifically for John Smith to do time off approvals. In this case, you will want to override the approver's existing permissions and set up permissions specific to the time off approval. You can achieve this by selecting the Override approver's existing permissions check box and selecting the appropriate permissions.

When you override John Smith's permissions, any approval paths using this special approver type will give John Smith the permissions set up for that approver type (his regular permissions will still be in effect for other approval paths that use him as a supervisor).

6. If you wish to add more approver types after this one, select the Add More check box. Add More will reload the **Add Approver Type** screen with blank fields after you have saved your data.
7. When you are finished setting up the approver type, click the Save button to save the data and return to the **Approver Types** list screen.

Edit an Approver Type


To edit an existing approver type:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **Approver Types** and click the  next to the approver type you want to edit on the Approver Types list screen. Optionally, click the underlined approver type name.
3. Edit the approver type information and click the Save button when you are finished.

Delete an Approver Type

If you are no longer using a specific approver type, or if you create an approver type in error, you can delete it from the database. You cannot delete an approver type if it is attached to any approval paths.

You can delete a single approver type or multiple approver types at once. To delete a single approver type:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **Approver Types** and click the  next to the appropriate approver type on the **Approver Types** list screen.
3. Web TimeSheet will confirm that you want to delete an approver type before removing it from the database. If you are sure you want to delete the approver type, select Yes when prompted. If you do not want to delete the approver type, select No to cancel the deletion and return to the Approver Types list screen.

To delete multiple approver types:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Click on **Approver Types** and select the check boxes next to the approver types you wish to delete. If you want to delete all approver types, select the check box labeled Select All (at the bottom of the list).
3. Click the Delete button to delete the selected approver types. Web TimeSheet will confirm that you want to delete the approver types before removing them from the database. If you are sure you want to delete the approver types, select Yes when prompted. If you do not want to delete the approver types, select No to cancel the deletion and return to the **Approver Types** list screen.

Approval Paths

Approval paths define the approval process for the users in your organization. You can create many different approval paths for both timesheets and expenses, and assign the paths to users. Each user can be assigned up to two approval paths - one for timesheets and one for expenses.

Adding an Approval Path

To add a new approval path:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Click on **Approval Paths** to create custom approval settings.
3. On the **Approval Paths** list screen, select the tab (Timesheet or Expenses) for which you want to add a new approval path.
4. Click the Add button to add a new path.
5. Enter the name of the approval path.
6. Now select the appropriate approver types and approval sequence for this path. The approval sequence will determine the order in which the associated approver types receive the submitted timesheets/expenses.

An approval path may be set up with any sequence, meaning that multiple approver types can approve timesheets/expenses at the same time. For example, an approval path might be set up to send timesheets to the project leaders and clients concurrently, with the supervisor as the final approver. In this case, both Project Leader and Client Rep approval sequences would be "1st", and the Supervisor sequence would be "2nd".

If you wish to omit an approver type from the path, simply select <Do Not Use> in the Approval Sequence drop-down list.
7. When you are finished, click the Save button to apply your changes.

Note ...

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense features are available only if you have a valid license for the Expense module.

Note ...


Once you have set up your base currency and implemented Web TimeSheet, changing the base currency is not recommended. You may encounter precision problems with exchange rates due to a base currency conversion.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense features are available only if you have a valid license for the Expense module.


Editing an Approval Path

To edit an existing approval path:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Click on **Approval Paths**. On the **Approval Paths** list screen, select the tab (Timesheet or Expenses) for which you want to modify an existing approval path.
3. Click the  next to the approval path you want to edit, or click the underlined path name.
4. Edit the approval path information and click the Save button when you are finished.

Setting the Default Approval Path

Web TimeSheet provides a default approval path that is, by default, applied to all users. You may choose to modify the default path (follow instructions for editing an approval path) or set a different approval path as the default. To set a new default approval path:


1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Click on **Approval Paths**. On the **Approval Paths** list screen, select the tab (Timesheet or Expenses) for which you want to set a new default approval path.
3. The default approval path is identified at the bottom of the list. Click the corresponding  to set a new default path.
4. On the **Set Default Approval Paths** screen, select a new approval path to be used as the default.
5. Click the Save button when you are finished.

Deleting an Approval Path

You may want to delete approval paths you are no longer using. Deleting an approval path removes it from the database.

You cannot delete an approval path if the path is assigned to one or more users and/or the path is set as the default approval path.

To delete an approval path:


1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **Approval Paths**. On the **Approval Paths** list screen, select the tab (Timesheet or Expenses) for which you want to delete an approval path.
3. Click the  next to the appropriate approval path.
4. Web TimeSheet will confirm that you want to delete an approval path before removing it from the database. If you are sure you want to delete the approval path, select Yes when prompted. If you do not want to delete the approval path, select No to cancel the deletion and return to the **Approval Paths** screen.

Currencies

You can set up all the currencies you need to track client billing, project costs, and expenses anywhere in the world. Web TimeSheet will convert all amounts into the base currency you specify.

Setting the Base Currency


The base currency is the main currency used by your organization for financial transactions. This is the currency in which all costs are calculated, and the currency to which foreign currency amounts are converted. Web TimeSheet comes with a default base currency of US Dollars. To change it to your organization's base currency:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **Currencies**. Your base currency is named at the bottom of the **Currencies** screen, under the list of currencies. To edit your base currency, click the  at the bottom of the screen.
3. Select a new base currency from the drop-down box. When you are finished, click the Save button.

Adding and Editing Currencies


Adding currencies will allow you to track the billing, project costs, and expenses for offices worldwide. To add a currency:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **Currencies** and click the Add button on the **Currencies** screen.
3. Enter the name and symbol of the new currency. The symbol can be an actual symbol (\$) and/or an abbreviation (CAD).
4. Enter the rate of exchange between the new currency and your base currency. When you are finished, click the Save button at the bottom of the screen.

You may wish to change the information for a specific currency or, more specifically, the rate of exchange between the currency and your designated base currency. To edit the currency information, click the  next to the appropriate currency or click on the underlined currency name. Modify the currency information and click the Save button when you're finished.

To edit exchange rate information, refer to *Finding, Editing and Deleting Exchange Rates* below.


Finding, Editing, and Deleting Exchange Rates

To amend the exchange rate history, click the  next to the current exchange rate on the **Edit Currency** screen. Then follow the instructions for each action below.

If a currency has a large exchange rate history, you can use the Find option to locate a specific exchange rate. Just click the Find button on the **Exchange Rates** screen and enter the criteria for the search.

To add an exchange rate to the rate history, click the Add button on the **Exchange Rates** screen. Enter the rate and its effective date and click the Add button.

To edit an existing rate, click the  next to the rate and enter the new rate value. Click the Save button when you're finished.

To delete an exchange rate, click the  next to the exchange rate on the **Exchange Rate History** screen. To delete multiple rates at once, select the check boxes next to the rates you want

to delete (or select the check box labeled **Select All** to delete all rates) and click the Delete button. Web TimeSheet will confirm that you want to delete the rate(s) before removing them from the database. If you are sure you want to delete the rate(s), select Yes when prompted.


When you are finished using the **Exchange Rate History** screen, click the Done button to return to the **Edit Currency** screen. Make sure you save your changes.

Deleting Currencies

If you are no longer using certain currencies, you can delete these currencies from the database. Deleting a currency will prevent cost calculations in that currency.

You can delete a single currency or multiple currencies at once.

To delete a single currency:

1. Click the  next to the appropriate currency on the **Currencies** screen.
2. Web TimeSheet will confirm that you want to delete a currency before removing it from the database. If you are sure you want to delete the currency, select Yes when prompted. If you do not want to delete the currency, select No to cancel the deletion and return to the **Currencies** screen.

To delete multiple currencies at once:

1. Select the check boxes next to the currencies you wish to delete. If you want to delete all currencies, select the check box labeled **Select All** (at the bottom of the list).
2. Click the Delete button to delete the selected currencies. Web TimeSheet will confirm that you want to delete the currencies before removing them from the database. If you are sure you want to delete the currencies, select Yes when prompted. If you selected the Delete button in error, you can select No to cancel the deletion and return to the **Currencies** screen.

Note ...

If you are using Web TimeSheet for Oracle, note that currency symbols such as EURO (encoded in UniCode standards) are not recognized by Oracle due to a difference in character representation.

For these currencies, it is recommended that you use an alphabetical abbreviation for the symbol (e.g., EUR).

You cannot delete the first exchange rate listed on the **Exchange Rates** screen. You can, however, edit the rate if necessary.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Note ...

You cannot delete departments that are associated with users (user profile). You must first edit the user profile(s), then delete the department.

If you wish to remove a department, but you are unable to delete it, you may disable the department to prevent further use. In this situation, you should remove any users from the department, and then disable the department. Disabling the department will not affect any projects or timesheets with which the department is associated. To disable a department, follow the instructions for editing a department and deselect the Enabled check box on the **Edit Department** screen.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Departments

A department is a division of employees that may define the hierarchical structure, geographic regions, or functional groups within your organization. Departments can be assigned to projects, and can be used to track information for reporting purposes. Departments may contain any number of users, but a user may be assigned to only one department.

If you plan to implement departments, you should define your departments before setting up your users, allowing you to add a user and assign the user a department in one easy step.

Filtering Departments

You can view a list of existing departments by clicking on the **Admin** button at the top of the screen and selecting **Departments** from the side menu. On the **Departments** screen, the Basic Filter section provides common fields you may use to limit the displayed department list. To use these filters, enter text in one of the fields or select the check box. Click the Apply button. The screen will refresh with the filtered data.


Adding and Editing Departments

Adding departments will allow you to assign the proper users to projects and to track time and expense data for reporting purposes. Each department can have subdepartments that identify more specific groups within a department.


To add a parent department:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **Departments**. Click the Add button on the **Departments** screen and enter the name of the new department. Additional fields such as code and comments are optional.
3. Select the Add More check box if you wish to add more parent departments after this one. When you are finished, click the Add button at the bottom of the screen.

Now that you have created the parent department, you can define subdepartments (children) to identify more specific areas of work within that group. To add a subdepartment:

1. Click the  next to the name of the parent department on the **Departments** screen.
2. Repeat the steps for adding a parent department. Click the Add button when you are finished.

You can add as many subdepartments as needed, with as many branches as necessary to best identify your departmental structure.

Departments can be modified at any time. To edit a department, click on the  next to the appropriate department or click on the underlined department name. Modify the information and click the Save button when you are finished.


To edit subdepartments, expand the appropriate department so the associated subdepartments are displayed and follow the procedure above. To expand a department, click the **+** next to the department name. Click the **-** to collapse the list.

Deleting Departments

You can delete departments and subdepartments. Deleting a parent department will remove both the parent and all subdepartments from the database.

You cannot delete a department that has users assigned to it or is itself assigned to a project. You must first reassign the users to new departments and remove the department from all project teams. If no previously assigned users entered any time in their timesheets, you will be able to delete the department (when a user enters time in the timesheet, the time is associated with the user's department as well as the individual user, thus making it impossible to delete a department once time has been entered by a user associated with the department).

To delete a department:

1. Click the  next to the appropriate department.
2. Web TimeSheet will confirm that you want to delete a department before removing it from the database. If you are sure you want to delete the department, select Yes when prompted. If you do not want to delete the department, select No to cancel the deletion and return to the **Departments** screen.

If you wish to remove a department, but you are unable to delete it, you may disable the department to prevent further use. In this situation, you should remove any users from the department, and then disable the department. Disabling the department will not affect any projects or timesheets with which the department is associated. To disable a department, follow the instructions for editing a department and deselect the Enabled check box on the **Edit Department** screen.

Employee Types

An employee type is a group that identifies employees for payroll and time tracking purposes (full-time, part-time, contract, etc.). A user can be assigned to only one employee type at a time.

Web TimeSheet provides predefined employee types. You can create additional employee types specific to your organization. Employee types must be defined before setting up users or defining employee type timesheet periods.

Finding Employee Types

If your organization has a large database, you may want to use the Find feature to locate a specific employee type. To find an employee type, click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.

Select **Employee Types** and click the Find button on the **Employee Types** screen. Then enter the name or description of the employee type you want to find. Click the Find button again to start the find process. When you are finished, click the End Find button to return to the complete list of employee types.


Adding and Editing Employee Types

Adding employee types will allow you to group employees for reporting purposes.

To add an employee type:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.


2. Select **Employee Types** and click the Add button on the **Employee Types** screen.
3. Enter the name of the new employee type and a description, if needed. When you are finished, click the Add button at the bottom of the screen.

To edit an employee type, click the  next to the appropriate employee type or click on the underlined name on the **Employee Types** screen. Modify the information and click the Save button when you are finished.

Deleting Employee Types

If you are no longer using a specific employee type, or if you create an employee type in error, you can delete it from the database. Make sure that when you delete an employee type, no users are associated with that employee type.

You can delete a single employee type or multiple employee types at once. To delete a single employee type:

1. Click the  next to the appropriate employee type on the **Employee Types** screen.
2. Web TimeSheet will confirm that you want to delete an employee type before removing it from the database. If you are sure you want to delete the employee type, select Yes when prompted. If you do not want to delete the employee type, select No to cancel the deletion and return to the **Employee Types** screen.

To delete multiple employee types:

1. Select the check boxes next to the employee types you wish to delete. If you want to delete all employee types, select the check box labeled **Select All** (at the bottom of the list).
2. Click the Delete button to delete the selected employee types. Web TimeSheet will confirm that you want to delete the employee types before removing them from the database. If you are sure you want to delete the employee types, select Yes when prompted. If you selected the Delete button in error, you can select No to cancel the deletion and return to the **Employee Types** screen.

Note ...

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Note ...

When entering the gross to net formula, do not enter a currency symbol. The tax will be calculated in the currency for the expense itself, and is not necessary in the formula.

You cannot delete expense codes for which expenses have been entered (or expense codes attached to projects). You can, however, disable the expense code to prevent further use.

Clicking the Cancel button at the bottom of the screen will cancel the process without saving your changes.

You can use expense codes only if you have a valid license for the Expense module.

Expense Codes

Expense codes define the different costs incurred for business activities and purchases. Web TimeSheet offers predefined expense codes that may be modified. You can also create additional expense codes for your organization.

Filter Expense Codes

You can view a list of existing expense codes by clicking on the **Admin** button at the top of the screen and selecting **Expense Codes** from the side menu. On the **Expense Code** screen, the Basic Filter section provides common fields you may use to limit the displayed expense code list. To use these filters, enter text in one of the entry fields or select an item from one or more of the drop-down lists. Click the Apply button. The screen will refresh with the filtered data.

Adding and Editing Expense Codes


Adding expense codes will allow you to identify the types of expenses that may be entered against specific projects, tasks, or payroll items. Expense codes will also allow you to track the kinds of expenses being recorded by Web TimeSheet users.

To add an expense code:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Click on **Expense Codes**. On the **Expense Codes** screen, click the Add button to create a new expense code.
3. Enter the name of the new expense code and specify whether it is based on an expense rate (e.g., mileage) or a flat amount (e.g., hotel). If the expense code is based on an expense rate, you must enter the appropriate rate and the unit to which that rate applies. For example, if you are entering an expense code for mileage, the rate might be \$.80 per mile (or kilometer).
4. You will need to enter the gross to net formula (see *Understanding the Gross to Net Formula*), which instructs Web TimeSheet how to calculate backwards from the total

expense amount to the net amount (pre-tax).

5. If taxes have been enabled system wide, you can associate them with the expense code by selecting the Enabled check box next to the appropriate tax. Each expense code can have up to five associated taxes. Notice that next to each tax code is the default tax formula set up for the code. You can edit this formula at the expense code level. If you do edit the formula, any changes you make will apply only to this expense code. The original tax formula will remain unchanged.
6. When you are finished, click the Add button at the bottom of the screen.

You may wish to change the information for a specific expense code (e.g., the expense rate changes). To edit an expense code, click on the  next to the appropriate code or click on the underlined name. Modify the information and click the Save button when you are finished.

Understanding the Gross to Net Formula

The “gross to net” formula instructs Web TimeSheet how to calculate backwards from the gross (total expense amount) to the net (pre-tax amount) for an individual expense. Providing this formula will ensure expense amounts are correct, whether the user enters the net or the gross amount for a specific expense.

When entering the gross to net formula, you may enter a simple formula (useful for expenses with only one tax) or a complex, multi-level formula using parentheses to indicate precedence (useful for expenses with more than one tax). The formula may contain the following operators:

| Operator | Description |
|----------|---|
| + | Add |
| - | Subtract |
| * | Multiply |
| / | Divide |
| () | Indicates precedence |
| \$Gross | Tag for the gross amount, which will be used to calculate the net amount. |

Example 1

For a 7% state sales tax, the gross to net formula would be entered as **$\$Gross/1.07$** .

Example 2


For a 6% sales tax and a flat tax of \$10.00, where the 6% sales tax is applied to the net amount before the flat tax is added, the gross to net formula would be entered as **$(\$Gross-10)/1.06$** .

Parentheses are used to indicate that the 10 dollars should be subtracted from the gross amount before the 6% sales tax is deducted.

Deleting Expense Codes

You can delete a single expense code or multiple expense codes at a time, provided the code is not attached to a project or existing expense sheets.

To delete a single expense code:

1. Click the  next to the appropriate expense code on the **Expense Codes** screen.
2. Web TimeSheet will confirm that you want to delete an expense code before removing it from the database. If you are sure you want to delete the expense code, select Yes when prompted. If you do not want to delete the expense code, select No to cancel the deletion and return to the **Expense Codes** screen.

To delete multiple expense codes:

1. Select the check boxes next to the expense codes you wish to delete. If you want to delete all expense codes, select the check box labeled **Select All** (at the bottom of the list).
2. Click the Delete button to delete the selected expense codes. Web TimeSheet will confirm that you want to delete the expense codes before removing them from the database. If you are sure you want to delete the expense codes, select Yes when prompted. If you selected the Delete button in error, you can select No to cancel the deletion and return to the **Expense Codes** screen.

Holidays

Holiday calendars allow users to review the dates when statutory (civic) holidays occur. When you create a holiday calendar, you can set up each holiday to use a different icon that will be used to identify the holiday both in the users' timesheets and in the Web TimeSheet calendars.

After creating a holiday calendar, you can assign the calendar to various users, who can then see the holiday icons in their timesheets and pop-up calendars. The users can also review a complete list of their assigned holidays (and others) from within the Timesheet menu, depending on their permissions.

Adding a Holiday Calendar

To add a holiday calendar:

1. Click on the **Admin** button at the top of the screen and select **SETUP** to display a list of advanced setup options.
2. Select **Holidays** and click the Add button on the **Holiday Calendars** screen.
3. On the **Calendar Setup** screen, enter the name of the new holiday calendar (e.g., U.S. Holidays).
4. To add individual holidays to this calendar, click the small Add button to the right of the Holidays list box.
5. Enter the date the holiday occurs and a description. If you would like to associate an icon with this holiday, select the appropriate icon file from the drop-down list.
6. If you would like to add more holidays after this one, select the Add More check box.
7. Click the Save button when you are finished.

Customizing the List of Holiday Icons

Web TimeSheet provides a large number of holiday icons; however, you may add more icons if desired.

To add icons:

1. Go to the directory where you installed Web TimeSheet on your server.

Note ...

You cannot delete expense codes for which expenses have been entered (or expense codes attached to projects). You can, however, disable the expense code to prevent further use.

Clicking the Cancel button at the bottom of the screen will cancel the process without saving your changes.

You can use expense codes only if you have a valid license for the Expense module.

Note ...

Deleting a holiday has no adverse affect on users or their timesheets. Deleting a holiday simply removes the holiday from the user's holiday calendar and removes the holiday icon from the user's timesheet.

You may delete a holiday calendar only if the calendar is NOT assigned to any users.

You cannot delete a payment method if any expenses have been entered against it. In this case, you should disable the payment method to prevent future use.

Payment methods and tax codes are available only if you have a valid license for the Expense module.


Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

2. Place the icon files in the html/icons/holidays/ folder in the Web TimeSheet directory. Icon files must be in this location.
3. Restart the Web TimeSheet service to see your changes.

Icons must be .gif or .jpg images, and no larger than 16 X 16 pixels.

Editing a Holiday Calendar

To edit an existing holiday calendar:

1. Click on the **Admin** button at the top of the screen and select **SETUP** to display a list of advanced setup options.
2. Select **Holidays** and click the  next to the appropriate holiday calendar on the **Holiday Calendars** screen.
3. To edit an existing holiday, select the holiday in the list box and click the small Edit button. When you are finished, click the Save button to save your changes and return to the **Calendar Setup** screen.


To remove an existing holiday, select the holiday in the list box and click the small Delete button. Web TimeSheet will confirm the deletion before removing the holiday from the calendar. If you are sure you want to delete the holiday, select Yes when prompted. If you do not want to delete the holiday, select No to cancel the deletion.

4. When you are finished editing the holiday calendar, click the Save button on the **Calendar Setup** screen.

Deleting a Holiday Calendar

If you are no longer using a holiday calendar, you can delete it from the database. To delete a holiday calendar:

Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.

Select **Holidays** and click the  next to the appropriate holiday calendar on the **Holiday Calendars** screen. Web TimeSheet will confirm that you want to delete a calendar before removing it from the database. If you are sure you want to delete the calendar, select Yes when prompted. If you do not want to delete the calendar, select No to cancel the deletion and return to the **Holiday Calendars** screen.

Payment Methods


Payment methods are used to specify how expenses were paid. Web TimeSheet provides a set of predefined payment methods that may be edited to meet the needs of your organization. You can also create new payment methods in addition to those provided.

Adding and Editing Payment Methods

Adding payment methods will allow users to specify how individual expenses were paid (within the expense sheet).

To add a payment method:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **Payment Methods** and click the Add button on the **Payment Methods** screen.
3. Enter the name of the new payment method and description (optional).
4. To enable the payment method for use in expense sheets, select the Enabled check box.
5. Select the Add More check box if you wish to add more payment methods after this one.
6. When you are finished, click the Add button at the bottom of the screen.


You can modify the details for a payment method at any time. To edit a payment method, click on the  next to the appropriate payment method or click on the linked name. Modify the information and click the Save button when you are finished.

Deleting Payment Methods

You can delete payment methods if they are not used by your organization. Deleting a payment method will remove it from the database.

To delete a payment method:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.

2. Select **Payment Methods** and click the  next to the appropriate payment method on the **Payment Methods** screen. Web TimeSheet will confirm that you want to delete a payment method before removing it from the database. If you are sure you want to delete the payment method, select Yes when prompted. If you do not want to delete the payment method, select No to cancel the deletion and return to the **Payment Methods** screen.

Tax Codes


Tax codes define the different taxes applied to expenses incurred for business activities and purchases. Web TimeSheet offers predefined tax codes that may be modified if necessary. You can also create additional tax codes for your organization.

Adding and Editing Tax Codes

Adding tax codes will allow you to identify what taxes are applied to the various types of expenses incurred by employees of your organization. When you add a tax code, you will be required to enter the tax formula (see *Understanding the Tax Formula*), which is a formula that tells Web TimeSheet how to calculate the tax based on the **net amount** of the expense. This formula can be overridden when the tax is associated with a specific expense code.

To add a tax code:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **Tax Codes** and click the Add button to create a new tax code.
3. Enter the name of the new tax code and the formula that will be used to calculate the tax amount. If you want to associate the tax with expense codes, make sure the tax code is enabled.
4. When you are finished, click the Add button at the bottom of the screen.

You can modify the details for a tax code at any time. To edit a tax code, click on the  next to the appropriate tax code or click on the linked name. Modify the information and click the Save button when you are finished.

Understanding the Tax Formula

Each tax code has a “tax formula” that tells Web TimeSheet how to calculate the tax based on the **net amount** of the expense. This formula can be edited at the system level or when the tax is applied to an expense code. The formula at the expense code level will apply only to that expense code.

You may create a rated tax (calculates the tax as a percentage of the net amount) or a flat tax (adds a flat amount to the net amount).

When creating your tax formula, use the following operators:

| Operator | Description |
|----------|--|
| + | Add |
| - | Subtract |
| * | Multiply |
| / | Divide |
| () | Indicates precedence |
| \$Net | Tag for the net amount, which will be used to calculate the tax. |

Example 1

The formula for a 7% state sales tax would be entered as **\$Net*0.07**.


Example 2

The formula for a flat tax (such as airport tax) would be entered as **10.00**.

Deleting Tax Codes

You can delete a single tax code or multiple tax codes at a time.

To delete a single tax code:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **Tax Codes** and click the  next to the appropriate tax code on the **Tax Codes** screen.
3. Web TimeSheet will confirm that you want to delete a tax code before removing it from the database. If you are sure you want to delete the tax code, select Yes when prompted. If you do not want to delete the tax code, select No to cancel the deletion and return to the **Tax Codes** screen.

Note ...

Tax codes are available only if you have a valid license for the Expense module.

When entering the tax formula, do not enter a currency symbol. The tax will be calculated in the currency for the expense itself, and is not necessary in the formula.

Clicking the Cancel button at the bottom of the screen will cancel the process without saving your changes.

Note ...

Accruals do not accumulate and resets do not occur in the past (not retroactive).

If you are implementing accruals on June 1st, for example, you should set up the Allowed days to include all accrued days up to June 1st, and begin the accruals on or after June 1st. The reset date should occur on or after June 1st, as well.

You cannot delete time off codes for which time has been entered in users' timesheets. You can, however, disable the time off code to prevent further use.

Clicking the Cancel button at the bottom of the screen will cancel the process without saving your changes.

Time off is tracked in either hours or days, depending on your system preferences. Refer to *Chapter 11 - System Configuration* for further information about system preferences.

To delete multiple tax codes:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Click on **Tax Codes** and select the check boxes next to the tax codes you wish to delete. If you want to delete all tax codes, select the check box labeled **Select All** (at the bottom of the list).
3. Click the Delete button to delete the selected tax codes. Web TimeSheet will confirm that you want to delete the tax codes before removing them from the database. If you are sure you want to delete the tax codes, select Yes when prompted. If you do not want to delete the tax codes, select No to cancel the deletion and return to the **Tax Codes** screen.

Time Off Codes

Time Off codes define the different types of absences used in your organization. Web TimeSheet offers predefined time off codes that may be modified. You can also create additional time off codes for your organization.

Time off may include automatic accrual and/or reset on a weekly, monthly, semi-monthly, or yearly basis. These settings are maintained globally for each time off code, with the option to override global settings at the user level.

Accruals and reset options can be used separately or concurrently. View the time off scenarios (*Chapter 4 - Getting Started*) for examples of how you may best set up time off codes to fit the needs of your organization.


Adding and Editing Time Off Codes

Adding time off codes will allow you to track users' absences such as vacation, sick time, jury duty, etc.

To add a time off code:


1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to display a list of advanced setup options.

2. Select **Time Off Codes** and click the Add button on the **Time Off Codes** screen.
3. Enter the name of the new time off code. Optionally, enter a code and/or description for the time off code.
4. Specify whether the time off code is enabled. Enabling a time off code allows you to assign the code to specific users (by default, new users will have access to all enabled time off codes). You must enable a time off code at the global level if you want it to be available at the user level; however, you can disable the code at the user level if you want to prevent specific users from entering time against it in their timesheets.
5. Specify how the time off code will be tracked in users' timesheets. You can track a code as "hours/days remaining" or "hours/days taken" (time off will be tracked in either hours or days, depending on your system preferences). If you do not want to track the time off code in users' timesheets, select "Do not track in Timesheet".
6. Set the global accrual and reset options for the time off code. Global settings are useful if the same rules apply to all (or most) users in the system. Global accrual/reset options can be overridden at the user level.
7. When you are finished, click the Save button at the bottom of the screen.

To change a time off code, click the  next to the appropriate code or click on the underlined name on the **Time Off Codes** screen. Modify the information and click the Save button at the bottom of the screen.

Deleting Time Off Codes

You can delete a single time off code or multiple time off codes at once. To delete a single time off code:

1. Click the  next to the appropriate time off code on the **Time Off Codes** screen.
2. Web TimeSheet will confirm that you want to delete a time off code before removing it from the database. If you are sure you want to delete the time off code, select Yes when prompted. If you do not want to delete the time off code, select No to cancel the deletion and return to the **Time Off Codes** screen.

To delete multiple time off codes:

1. Select the check boxes next to the time off codes you wish to delete. If you want to delete all time off codes, select the check box labeled **Select All** (at the bottom of the list).
2. Click the Delete button to delete the selected time off codes. Web TimeSheet will confirm that you want to delete the time off codes before removing them from the database. If you are sure you want to delete the time off codes, select Yes when prompted. If you selected the Delete button in error, you can select No to cancel the deletion and return to the **Time Off Codes** screen.

Disclaimers

A disclaimer is a signature message that appears on users' timesheets, expense sheets, and/or approval screens.

To add a disclaimer:

1. Click on the Admin button and select **SETUP** for a list of advanced setup options.
2. Select **Disclaimers**. On the **Disclaimers** screen, select the type of disclaimer (Approvals, Expenses, Timesheet) and enter the title and disclaimer text. The type of disclaimer determines where the message is displayed. For example, if you select a Timesheet disclaimer, the text you enter will be displayed on all users' timesheets.
3. When you are finished, click the Save button at the bottom of the screen.
4. To delete a disclaimer, highlight the disclaimer title and description and delete the text. Click the Save button.

User Defined Fields

User Defined Fields are custom fields used for informational purposes and reports. User defined fields can be created for the screens outlined below.


| Item | Corresponding Screen |
|---------------|---|
| Timesheet | Timesheet |
| User | Add/Edit User (User Information), Edit Multiple Users |
| Project/Task | Edit Project, Edit Task |
| Expense | Expense Sheet, Expense Settings |
| Department | Add/Edit Department |
| Client | Add/Edit Client |
| Employee Type | Add/Edit Employee Type |

User defined fields can be formatted as a date, number, drop-down, or text type. For each field type, the Web TimeSheet user will be required to enter a different type of data, as follows:

| Type | Description |
|-----------|---|
| Date | The user will enter a valid date (either typed in the field or selected from a calendar). |
| Number | The user will enter a numeric value, possibly with decimals. |
| Drop-down | The user will select an option from a predefined drop-down list. |
| Text | The user will enter free-format text with a set number of maximum characters. |

Setting Up User Defined Fields

To set up user defined fields:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **User Defined Fields** and click on the appropriate tab on the **User Defined Fields** screen. Each tab identifies the Web TimeSheet screen(s) where the user defined fields will appear.
3. Now click the  next to the field you want to customize. Unused fields are identified as <Unused>.
4. On the **User Defined Field Settings** screen, enter the name of the user defined field. If you selected a field already in use, you may edit the existing name.

Note ...

You can create Expense disclaimers and user defined fields only if you have a valid license for the Expense module.

If you change the name of an existing user defined field for timesheets or expenses, the field name will change on all timesheets/expense sheets, both old and new.

Clicking the Cancel button at the bottom of the screen will cancel the process without saving your changes.

Clicking the Cancel button at the bottom of the **Disclaimers** screen will restore the disclaimer text as of the last save.

5. Select the field type. The field type determines the type of information the field will allow (date, number, drop-down, text).

Each time you change the field type, the screen will be refreshed, displaying a new set of fields for the type you selected, as follows:

Date

For date fields, you can specify a valid date range and a default date for the field. The default date can be either a specific date selected from the calendar or the formula *\$Today* that will ensure the date defaults to today's date (date the field is actually being entered). *\$Today* is the only valid formula that may be entered.

Drop-down

For drop-down lists, you must set up a list of options that will appear in the drop-down and specify which option will be selected by default. To add new options, type the name of the option in the provided field and click the Add button to the right of the list box. The new option will be added to the list box.

To edit an existing option, select the option in the list box, modify the option as necessary, and click the Update button to apply the change.

If you want to remove an existing option, you can delete the option by selecting it in the list box and clicking the Delete button. The option will be removed from the list box

If an option has been used already, it cannot be deleted. A used option is one that has been selected from the drop-down on the associated Web TimeSheet screen. If an option has been used, you can disable it to prevent future use by selecting the option in the list box and clicking the Disable button. Disabled options remain in the list box and are identified as "disabled"; however, these options will not appear in the actual drop-down list on the appropriate screen. To re-enable an option that has been disabled, simply select the disabled option and click the Enable button. The "disabled" label will be removed and the option will once again be available in the drop-down list on the appropriate screen.

Number

For number fields, you can specify a valid numeric range, a number of decimal places (up to four), and a default value for the field. If you specify a number of decimal places and the user enters more than the number specified, Web TimeSheet will round the number entered to meet the decimal requirement.

Text

For text fields, you can specify a maximum number of characters and a default value for the field. For text fields, users can enter any text up to the maximum length of the field. Note that the maximum length does not determine the width of the text field, but rather the maximum number of characters that can be entered within the field. If the text entered exceeds the width of the field itself, the user can still continue to enter data (the text will scroll).

6. Specify whether the user defined field should be a required field on the appropriate screen. If you have set up a drop-down field type, the field will automatically be required (the user will be required to make a selection based on the options you created).
7. Now specify whether the user defined field is enabled. You must enable a user defined field if you want users to enter data for that field on the appropriate screen(s).
8. When you are finished, click the Save button at the bottom of the screen.


Removing User Defined Fields

If you want to remove a user defined field, you can either delete the field, which will remove all existing data from the system, or disable the field, which will retain existing data while preventing future use of the field. It is recommended that you disable (rather than delete) user defined fields, unless:


- no data has been entered against the field
- there are no more unused fields for that screen.

To delete a user defined field:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.

2. Select **User Defined Fields**. Click on the tab for which you want to delete a user defined field.
3. On the **User Defined Fields** list screen, click the  next to the field you want to delete. Web TimeSheet will confirm that you want to delete the field before removing it from the database. If you are sure you want to delete the field, select Yes when prompted. If you do not want to delete the field, select No to cancel the deletion and return to the **User Defined Fields** list screen.

To disable a user defined field:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **User Defined Fields**. Select the tab for which you want to disable a user defined field.
3. On the **User Defined Fields** list screen, click the  next to the field you want to disable.
4. Deselect the Enabled check box on the **User Defined Field Settings** screen and click the Save button to apply the change.

User Groups

User Groups allow you to group users in multiple ways in order to generate meaningful reports for your organization. User groups also may be used to filter lists of users at various locations within Web TimeSheet.

Because user groups are flexible, you can create many different types of user groups (user group sets) that are completely unrelated. For example, you may have one set of user group for Branches, which contains all the branches within your organization, and another set of user groups for Skill Sets, which contains the different types of skills each employee brings the organization.

Users may belong to as many (or as few) user groups as necessary.

Add a User Group Set


User groups are added in sets, where the set identifies the type of group (e.g., branch, skill set).

To add a user group set:

1. Click on the **Admin** button at the top of the screen and select **SETUP** to display a list of advanced setup options.
2. Select **User Groups** and click the Add button on the **User Group Sets** screen.
3. On the **User Group Setup** screen, enter the name of the new user group set.
4. To add individual user group to this set, click the small Add button to the right of the Groups list box. The **Add User Group** screen is displayed.
5. Enter the name and, optionally, the code and description for the new user group.
6. To assign users to the new user group, select the appropriate names in the Available Users list box. You may need to change the Department or Group filter to locate the appropriate names. When you are ready, click the >> button to add the name(s) to the user group. All selected users will appear in the Selected Users list box.
7. If you would like to add more user groups after this one, select the Add More check box.
8. Click the Save button when you are finished.

Edit a User Group Set

To edit an existing user group set:

1. Click on the **Admin** button at the top of the screen and select **SETUP** to display a list of advanced setup options.
2. Select **User Groups** and click the  next to the appropriate user group set on the User Group Sets screen.
3. To edit an existing group, select the group in the list box and click the Edit button. Make the necessary changes on the Edit User Group screen. Click the Save button to save your changes and return to the User Group Setup screen.

Note ...

Deleting a user group has no adverse affect on users or their timesheets.

Deleting a user group set will delete all user groups within that set; however, the deletion will have no adverse affect on users or their timesheets. Deleting a user group set simply removes the set from Web TimeSheet filters and reports.

Clicking the Cancel button at the bottom of the screen will cancel the process without saving your changes.


You can access user group features only if you have a valid license for the User Grouping module.

To remove an existing user group, select the group in the list box and click the Delete button. Web TimeSheet will confirm the deletion before removing it from the user group set. If you are sure you want to delete the user group, select Yes when prompted. If you do not want to delete the group, select No to cancel the deletion.

4. When you are finished editing the user group set, click the Save button on the **User Group Setup** screen.

Delete a User Group Set

If you are no longer using a user group set, you can delete it from the database. To delete a user group set:

1. Click on the **Admin** button at the top of the screen and select **SETUP** from the side menu to view a list of advanced setup options.
2. Select **User Groups** and click the  next to the appropriate user group set on the User Group Sets screen.
3. Web TimeSheet will confirm that you want to delete a user group set before removing it from the database. If you are sure you want to delete the user group set, select Yes when prompted. If you do not want to delete the set, select No to cancel the deletion and return to the **User Group Sets** screen.

Chapter 6 - Daily Operation

Introduction

After you have completed the setup process, users can begin entering billable and non-billable time and expenses. You will be able to track project costs and client billing, timesheet submission status, time off usage, and available vacation.

This chapter explains the actions involved in daily usage of Web TimeSheet, including:

- Entering, saving, and submitting timesheets
- Entering, saving, and submitting expense sheets
- Approving timesheets and expenses
- Using project notes

Entering, Saving, and Submitting Timesheets

Timesheets are used to enter time against specific projects/tasks and time off. Users complete and submit their timesheets to supervisors, project leaders, and/or clients for approval. The timesheets are then reviewed and either approved or rejected. Depending on the system configuration, supervisors, project leaders, and clients can either correct or reject timesheet items. Timesheets with rejected items are returned to the users for correction. When all items are approved, the time information is saved to the database.

Once a timesheet is submitted, the data can be analyzed by project leaders and supervisors to determine project status and costs, and to make more efficient resource planning decisions.

Timesheets display information based on the system configuration and the parameters entered in the user profiles. Each user's timesheet is unique, and the requirements for each timesheet entry may vary.

Web TimeSheet provides both a Standard timesheet and an In-Out timesheet format. Which format a user employs is determined by the permissions for that user. For further information about permissions, refer to *Chapter 10 - Administrative Functions*.

Navigation maps for both the Standard and In-Out timesheets are available in the Web TimeSheet online Help.

To access your user-specific timesheet, click on the **Timesheet** button at the top of the screen.

Standard Timesheet

The Standard timesheet provides a grid format where the user can enter the total number of hours spent on specific tasks throughout the day. The Standard timesheet displays a weekly timesheet (for periods larger than a single week, you can expand to see the entire timesheet period).

Before entering task and time off data, note that there may be additional fields either above the timesheet grid (apply to entire timesheet), within the grid (apply to a task row), or in the section at the bottom of the timesheet (apply to the actual hours entered for a particular task and date). These fields are user defined fields that have been set up by the administrator to collect additional data for your organization.

If your organization is DCAA compliant, you may be required to enter change comments when modifying a timesheet that has been unsubmitted, rejected, or re-opened. Web TimeSheet will prompt you to enter a comment on a separate pop-up window. To apply the change, enter a comment and click the OK button.

DCAA compliance is set at the system level. You will be prompted for change comments only if DCAA compliance is enabled. Refer to *Chapter 11 - System Configuration* for further information about DCAA compliance.

Note ...

Change comments (DCAA) apply to the timesheet as a whole (timesheet level user defined fields), individual rows (task, billing, row level user defined fields), or individual dates associated with a row (hours, comments, hour level user defined fields). When you make a change at one or more of these levels, the change comments will apply to all changes made at that same level.

For example, if you make multiple changes to items within the same row, you will be prompted for a comment at each change; however, the total comment will apply to all the changes you made to the row.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense features are available only if you have a valid license, and have been granted a seat assignment for the Expense module.

Note ...

Use the timesheet calendar to scroll through timesheet periods. In the calendar displayed below, the red periods indicate timesheets are overdue.

The utilization (productivity) bars keep you informed of your own productivity, and/or the productivity of your department and the entire company.

The utilization (productivity) bars are displayed only if you have a valid license for the ProMax module.

Refer to the ProMax User Manual for further information about the utilization (productivity) bars.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Task Selection (Add/Remove Tasks)

Task selection works the same regardless of whether you are using the Standard timesheet or the In-Out timesheet. To add tasks using the task selector:

1. Click the Add/Remove Tasks button to select the tasks you want to include in your timesheet.
2. On the **Add/Remove Tasks** screen, select the check boxes next to all tasks you want to add to your timesheet and click the >> button. Each task (and its position in the hierarchy) will be added to the Timesheet Tasks list box.


Depending on the type of work you do, you may require multiple rows for the same task. You can add a task as many times as necessary by selecting the check box and clicking the >> button. The task will be added to your timesheet as many times as you select it.
3. You may want to use the Up or Down arrows to arrange the tasks in the order you want them to appear in your timesheet. Simply select a task and move it up or down in the list. Keep in mind that the Up and Down arrows adjust **ONLY** the order of the task rows. The task drop-down list is in alphabetical order so you can find the task(s) you're looking for.
4. When you are finished, click the Save button. All tasks you selected will be inserted in your timesheet. Tasks selected multiple times will be added to the timesheet in multiple rows. For example, if you selected a task three times, the task will be listed three times in your timesheet.

You can also adjust the order of the task rows in your timesheet from the **Add/Remove Tasks** screen. Simply select the task you want to move and use the up and down arrows to move it in relation to the other task rows.

The up and down arrows **DO NOT** change the order of tasks in the Task drop-down list. The drop-down list always displays tasks in alphabetical order.

Duplicating Task Rows

If you are doing more than one type of work for a single task (e.g., billable and non-billable work) and need to create additional rows for that task, you can duplicate the task row without using the **Add/Remove Tasks** screen. Just click on the

 next to the task row you want to duplicate. A new row will be created with the same task name; however, the billing option for the new row will change to the next available billing option.

Using Separate Columns for Projects and Tasks

Your timesheet may contain separate columns for projects and tasks (and possibly clients), depending on how your organization has chosen to set up the Timesheet screen.

If your timesheet contains a Client column, you must select a client before choosing a project or task. Selecting a client will automatically filter the list of projects. You can then select a project, which will automatically filter the list of tasks.

By default, when you select a project, the Task drop-down list displays "<Select Task>" in gray text. This text is a reminder that you must select a task to which your time will be applied. Once you have selected a task, the text will disappear.

When selecting a task, it is important to note that the list contains only those tasks that are currently in your favourites. If you do not see the task you need, select the "[Get More ...]" option to find the correct task and add it to the list.

[Get More ...]

Selecting the [Get More ...] option from the task list launches a separate popup window that contains a list of all your assigned tasks for the selected project or client/project combination (depending on your timesheet setup). To select a task, simply highlight the task in the list and click the OK button. The selected task will appear in the drop-down in the appropriate timesheet row. The task will also be added to your favourites once you have saved the timesheet.


Time Off

To record time off, click the Add Time Off button to add a time off row. Select a time off code from the drop-down list.

Some time off codes may display the number of hours/days remaining or taken, depending on how the administrator has set up the time off code. This number is calculated based on the last saved timesheet and is displayed next to the specific time off code in the drop-down list.

Each time you enter more time, you must save your timesheet to update the hours/days remaining/taken.

Time Entry

To enter time against a task, click in the field for the appropriate task and date. If the page scrolls and you are not sure which task or date you are looking at, note that clicking in the field will display the date, task, and billing information in a line just below the timesheet grid. If the task path is abbreviated, it means there are too many task levels to display the entire path. Click on the  next to the task drop-down list to display a pop-up window with the task's full path name.

Enter the number of hours you worked on the task. If you are entering time in decimal format, you can enter up to two decimal places (e.g., 1.25 hours = one hour, 15 minutes). If you prefer a precise record of your time, use the stopwatch to record the exact number of hours and minutes you work on a task (see *Using the Stopwatch*, below).

Remember to select the correct billing option and enter the appropriate information in any additional columns that may appear for your task rows, if applicable (refer to *Chapter 5 - Advanced Setup Options* for further information about these additional columns).

To enter time against a time off code, click in the field for the appropriate date. Enter the number of hours you used for time off.

When you are finished, click the Save button to save your timesheet data. Each time you save your timesheet, the Progress bar at the far right of your timesheet will be updated to include the most current data. The Progress bar includes hours recorded against the project/task (and saved in timesheets) by the entire project team. The Progress bar is displayed only if you have permission to view project/task progress.

Billing and other additional columns are based on permissions. This means that your timesheet may not contain this information, depending on how the administrator has configured your individual permissions.

Using the Stopwatch

If you prefer a precise record of your time, you can use the stopwatch to track the exact number of hours and minutes you spend working on a project/task.

To use the stopwatch:

1. Click on the clock at the bottom of the timesheet. The clock will begin recording your time.
2. When you are finished working on your project/task, click the clock again. You will notice a time value next to your cursor. This value represents the amount of time you spent on your project/task.
3. To apply the time value to a particular project/task in your timesheet, click in the time cell that corresponds with the appropriate task and date.
4. Web TimeSheet will confirm that you want to commit your time to the specified date. At this point you may choose to:
 - click the OK button to commit the time to the selected project/task and date
 - click the Discard button to discard (throw away) the time
 - click the Cancel button to cancel the process and return to the Timesheet screen.
5. If you are committing the stopwatch time value to a cell that already contains time, you will need to specify whether you want to accumulate (add to the existing value) or overwrite (replace the existing value) the time for that cell.

Comments and Additional Fields

You may need to enter comments and/or additional information for task or time off date cells. This information will be entered at the bottom of the timesheet. To enter comments or additional information:

1. Click in a specific task or time off date cell. Enter information in the fields at the bottom of the timesheet. (Note that additional fields are available for task cells - only comments can be entered for time off.) The information will be applied to the timesheet task and date you selected (the field highlighted with a red line).
2. When you are finished, click the Save button to save your timesheet.

Note ...

The stopwatch maintains a record of your time. If you leave the Timesheet screen, or your Web TimeSheet session expires, you will not lose your stopwatch data.

This same rule applies to the time value once you have stopped the stopwatch. If you do not apply the time to a specific project/task, the time value will remain intact.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Note ...

Offline timesheet features are available only if you have a valid license, and have been granted a seat assignment for the Offline TimeSheet module.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Once you have saved comments and additional field information, the individual timesheet cell will be highlighted with a blue line. To review the information entered for that cell, click in the highlighted cell. To read all comments and additional field information for the timesheet, click the List button. Click the Edit button to return to the edit mode for an individual timesheet cell.

Refer to *Chapter 9 - Administrative Functions* for further information about the additional fields that may appear in your timesheet.

Copying Previous Timesheets

You can use the Copy From option to copy time, comments, and additional field information from the previous timesheet. The Copy From option works differently depending on the timesheet period.

| Timesheet Period | How "Copy From" Works |
|--|--|
| Weekly | <p>If selected from within the current timesheet, Copy From will duplicate all task and time off entries from the most recently saved timesheet.</p> <p>If selected from within a future timesheet (i.e., you open a future timesheet period), all task and time off entries will be copied from your current timesheet.</p> <p>If selected from within the current timesheet, Copy From will copy all task/ time off entries from the last week of the most recently saved timesheet to every week within the current timesheet period.</p> |
| Bi-weekly, Semi-Monthly, Monthly, Manual | <p>For manual timesheet periods where the period is shorter than a full week, Copy From will duplicate all task and time off entries for the portion of the week that applies.</p> |

To use the Copy From option, simply click the Copy From button at the bottom of the timesheet. This action will override all data previously entered in the timesheet.

Using the Offline TimeSheet

If you are going to be without Internet access for an extended period, you can use the offline timesheet to keep track of your hours. The offline timesheet is an HTML form that you can set up in Web TimeSheet and then e-mail to an e-mail account of your choice.

The offline timesheet is available ONLY for the Standard timesheet format. Refer to the *Offline TimeSheet User Guide* for further information about using the Offline TimeSheet.

In-Out Timesheet

The In-Out Timesheet provides a grid format where you can enter the start and end times when you work on a specific task during the day. In-Out Timesheet displays either a daily timesheet (entry mode) or the complete period (period in view mode). You cannot enter data on the **Period in View** screen; however, you can drill down to an individual day and enter data for that specific day.


Task Selection

Task selection works the same whether you are using the Standard timesheet or the In-Out timesheet. To add tasks using the task selector:

1. Click the Add/Remove Tasks button to select the tasks you want to include in your timesheet.
2. On the **Add/Remove Tasks** screen, select the check boxes next to all tasks you want to add to your timesheet and click the >> button. Each task (and its position in the hierarchy) will be added to the list box for the Tasks column in the timesheet.

Depending on the type of work you do, you may require multiple rows for the same task. You can add a task as many times as necessary by selecting the check box and clicking the >> button. The task will be added to your timesheet as many times as you select it.
3. You may want to use the Up or Down arrows to arrange the tasks in the order you want them to appear in your timesheet. Simply select a task and move it up or down in the list. Keep in mind that the Up and Down arrows adjust ONLY the order of the task rows. The task drop-down list is always in alphabetical order so you can find the task(s) you're looking for.
4. When you are finished, click the Save button. All tasks you selected will be inserted in your timesheet. Tasks selected multiple times will be added to the timesheet in multiple rows. For example, if you selected a task three times, the task will be listed three times in your timesheet.

Duplicating Rows

If you need to create additional rows for a task, you can duplicate the task without using the **Add/Remove Tasks** screen. Just click the  next to the task you want to duplicate. A new row will be created with the same task name.

Using Separate Columns for Projects and Tasks

Your timesheet may contain separate columns for projects and tasks (and possibly clients), depending on how your organization has chosen to set up the Timesheet screen.

If your timesheet contains a Client column, you must select a client before choosing a project or task. Selecting a client will automatically filter the list of projects. You can then select a project, which will automatically filter the list of tasks.

By default, when you select a project, the Task drop-down list displays “<Select Task>” in gray text. This text is a reminder that you must select a task to which your time will be applied. Once you have selected a task, the text will disappear.

When selecting a task, it is important to note that the list contains only those tasks that are currently in your favourites. If you do not see the task you need, select the “[Get More ...]” option to find the correct task and add it to the list.

[Get More ...]


Selecting the [Get More ...] option from the task list launches a separate popup window that contains a list of all your assigned tasks for the selected project or client/project combination (depending on your timesheet setup). To select a task, simply highlight the task in the list and click the OK button. The selected task will appear in the drop-down in the appropriate timesheet row. The task will also be added to your favourites once you have saved the timesheet. Time Off

To record time off, click the Add Time Off button to add a time off row. Then select a time off code from the drop-down list.

Some time off codes may display the number of hours/days remaining or taken, depending on how the administrator has set up the time off code. This number is calculated based on the last saved timesheet and is displayed next to the specific time off code in the drop-down list.

Each time you enter more time, you must save your timesheet to update the hours/days remaining/taken.

Time Entry

To record time against a task, enter the in time, out time, and/or number of hours spent working on the task. You must enter two of the three fields. Web TimeSheet will calculate the remaining field. If you prefer a precise record of your in and out times, you may use the stopwatch. To use the stopwatch, click the  to the left of the In or Out time cell. The stopwatch will automatically record the exact time.

Remember to select the correct billing option and enter the appropriate information in any additional columns that may appear for your task rows. The additional columns are user defined fields that have been set up by your administrator (refer to *Chapter 9 - Administrative Functions* for additional information).

To enter time against a time off code, click in the Hours field for the appropriate row. Enter the number of hours you used for time off.

When you are finished, click the Save button to save your timesheet data. Each time you save your timesheet, the Progress bar at the far right of your timesheet will be updated to include the most current data. The Progress bar includes hours recorded against the project/task (and saved in timesheets) by the entire project team. The Progress bar is displayed only if you have permission to view project/task progress.

Overlapping Time

Web TimeSheet will highlight any overlapping time with a red line. Depending on your permissions, you may be required to fix the overlapping time before saving or submitting your timesheet. If you are allowed to enter overlapping time, Web TimeSheet will still highlight the time, but will not require you to resolve the conflict before saving or submitting.

Comments

Comments are text notes you attach to specific time entries in your timesheet when you want to make note of project status, due dates, or special circumstances related to a specific time entry.

In the In-Out timesheet, comments are attached to a single row. To add a comment, simply enter the comment text on the appropriate row. Remember to save your timesheet when you're finished.

Note ...

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Note ...

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

You can access the expense functions only if you have a valid license, and have been granted a seat assignment for the Expense module.

Copying Previous Timesheets

You can use the Copy From option to copy time information from the previous day. If no data is entered for the previous day, Web TimeSheet will copy the information from the last date for which time was saved.

To use the Copy From option, click the Copy From button at the bottom of the timesheet. This action will override all data previously entered in the timesheet.

Period in View

The **Period in View** screen is used for the In-Out timesheet to review data entered for an entire period. The **Period in View** screen is displayed in a calendar format, with links to each day in the period. Clicking on a date will open the entry screen for that date.

All in-out information is displayed on the **Period in View** screen. Overlapping time is highlighted with red text.

To access the **Period in View** screen, click the View Period button on the daily timesheet (entry screen).

Holidays

You can access a list of holidays by selecting **Holiday Calendar** from the **Timesheet** side menu. The holiday information will appear in a separate pop-up window.

The holiday information is based on a holiday calendar assigned to you by the Web TimeSheet administrator. To view information from other holiday calendars, select a different calendar and/or year from the filters at the top of the Holidays screen.

Clicking the Close button will close the **Holidays** screen and return to the **Timesheet** screen.

Managing Favorites

Favorites are the tasks listed in the drop-down list in your timesheet. Each time you add a task to your timesheet, the task is also added to your favorites. You can customize your favorites by adding/removing specific tasks from the list. You are allowed up to 50 tasks in your favorites list at one time.


To manage your favorites:

1. Select **Manage Favorites** from the Timesheet menu.

2. On the **Manage Favorite Task List** screen, select the check boxes next to all tasks you want to add to your timesheet favorites and click the >> button.
3. To remove tasks from your timesheet favorites, select the task in the Timesheet Tasks list box and click the << button. If you remove tasks, they will no longer be included in the drop-down list in your timesheet.
4. When you are finished, click the Save button.

Submitting Timesheets

When a period ends, you must submit your timesheet for approval. The approval process ensures that time is entered correctly for more efficient and accurate analysis. To submit your timesheet for approval, click the Submit button.

If an approver rejects your timesheet, the **Timesheet** button will turn red and a  will be displayed in your timesheet. You can then review the approval details, correct errors, and resubmit your timesheet for approval.

You can view timesheets based on their approval status by selecting a view option from the **Timesheet** menu. For each option, timesheets are identified by the period to which they apply:

Waiting for Approval

Displays a list of your submitted timesheets that are waiting for approval by the appropriate supervisor, project leader(s) and/or client(s).

Approved

Displays a list of your submitted timesheets that have been approved.

Rejected

Displays a list of your submitted timesheets that have been rejected. Rejected timesheets must be corrected, resubmitted, and approved before they are officially closed and processed.

View the timesheet details by selecting the appropriate timesheet period. To review approval/rejection details, make changes, or resubmit a timesheet, follow the instructions for timesheet entry.

Using the Unsubmit Option

If you submit your timesheet for approval and then discover an error within the timesheet, you can use the unsubmit option to recover the timesheet as long as the timesheet is still waiting for approval. In other words, once the timesheet has been approved, you cannot unsubmit.

The unsubmit option is available only if you have appropriate permissions. Refer to *Chapter 9 - Administrative Functions* for further information about permissions.

Entering Expenses

An expense is cost incurred from work-related tasks and/or purchases (travel, meals, office supplies, etc.). Expenses may be non-billable or billable, the latter applying to expenses for a project funded by a specific client. Users may request reimbursement for expenses they paid themselves.

Users complete and submit their expense sheets to supervisors, project leaders, and/or clients for approval. The expense sheets are then reviewed and either approved or rejected.

Depending on the system configuration, supervisors, project leaders, and clients can either correct (edit) or reject erroneous expenses. Rejected expense sheets are returned to the users for correction. When the expense sheet is approved, the expense information is saved to the database.

Once an expense sheet is submitted, the data can be analyzed by project leaders and supervisors to determine project costs and client billing.

Getting Started

Before you can enter expenses, you must create a new expense sheet. The expense sheet contains a list of expenses incurred against various projects.

To create a new expense sheet:

1. Click on the **Expenses** button at the top of the screen and click the Add button on the **Expense Sheets** list screen.

2. Enter a text description and date for the expense sheet, which will be used to identify the expense sheet for reporting purposes. You will not be able to save your expense sheet until you have entered the description and date.
3. Select a reimbursement currency. The reimbursement currency defaults to the base currency, but you can change it, if necessary.
4. If you are entering expenses incurred for a specific project, select the client and project from the drop-down lists.
5. Now you're ready to start adding expenses. Each line in the grid is a separate expense entry. Enter the date the expense was incurred (e.g., date on the receipt). If the project has been set up to limit the dates when you can incur expenses, you will need to make sure your incurred date falls within the specified range (an error message will notify you if the incurred date is invalid, and will provide you with the proper date range).
6. Select the type of expense and enter the amount as well as any other relevant data. For example, if this expense is going to be billed to the client, select the Bill Client check box. If you paid for the expense and want to request reimbursement, select the Reimburse check box.
7. If you selected a rate-based expense type (i.e., mileage), the Expense Details screen will appear. You must enter the quantity for the expense (instead of the amount). The amount will be calculated based on the quantity entered and the rate specified at the system level (refer to *Adding Expense Codes* in *Chapter 5 - Advanced Setup Options* for more information). If you have permission to do so, you may override the expense rate that will be used to calculate the amount.
8. If you need to add more lines, click the Add button at the bottom of the grid. Three more lines will be added.
9. Click the Save button when you are finished.

Note ...

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

You can use expense sheets only if you have a valid license, and have been granted a seat assignment for the Expense module.

Note ...

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

You can use expense sheets only if you have a valid license, and have been granted a seat assignment for the Expense module.

Entering Expenses for Multiple Projects

You can create an expense sheet that contains expenses for more than one project. Initially, the expense sheet will provide lines to enter expenses for a single project.

To add more projects, click the Add Project button at the bottom of the screen. Web TimeSheet will add another project section with three more expense lines. You may continue to add as many projects as necessary.

Expense Details


Expense details include additional information about an individual expense that may or may not be displayed in the main expense sheet (see *Customizing Expense Settings*).

To view expense details:

1. Click the Detail button on the expense line for which you want to view more information.
2. The **Expense Details** screen displays all information about the expense, including the payment method, net amount (pre-tax), tax amount(s), and total amount (after tax). You can edit any one of the amount fields and Web TimeSheet will recalculate the corresponding amounts based on the formulas created at the system level. For further information about taxes and tax formulas, refer to *Chapter 5 - Advanced Setup Options*.
3. If you make any changes on the **Expense Details** screen, click the Save button to apply those changes to the expense sheet.


Moving Expenses Between Projects

If you enter an expense and then realize the expense belongs to a different project, you can move the expense without re-entering all the information. The client and project do not have to be already displayed in the expense sheet. You can select a new client and project and Web TimeSheet will create a new section with the moved expense.

To move an expense, simply click the  next to the expense and select the client and project to which the expense should be moved. Click the OK button to move the expense.

Deleting Expenses from an Expense Sheet

You can delete expenses from the expense sheet either individually or in groups by project. Deleting expenses is an irreversible action; if you make a mistake, you will have to re-enter the expense data.

To delete an individual expense entry, click the  next to the expense you want to delete.

To delete all expenses for a single project, click the Delete button at the bottom of the grid for that project.

Web TimeSheet will confirm you want to delete the expenses before removing them from the expense sheet. If you are sure you want to delete the expense(s), select Yes when prompted. If you are not sure, select No to return to the expense sheet.

Customizing Expense Settings

You can use the Settings option to either add or remove certain fields from the expense sheet grid. Adding fields will allow you to enter/view additional information (such as payment method or taxes) directly in the expense sheet instead of opening the expense details. Removing fields will allow you to enter only the most basic information required for your organization and will save space in the expense sheet (especially valuable if your organization does not require certain fields).

To customize your settings, click the Settings button at the bottom of the expense sheet, select the fields you want to display on the expense sheet and click the Save button to apply your changes.

Viewing the Summary

The expense summary allows you to review the most important expense data in an easy-to-read format. The expense summary contains the following information:

- Description (expense sheet)
- Date (expense sheet)
- Client
- Project

- Billable Total
- Total (both billable and non-billable)
- Reimburse (in reimbursement currency)
- Total (all projects by client)
- Grand Total (expense sheet)


To view the expense summary, click the Summary button at the bottom of the expense sheet.

Editing and Deleting Expense Sheets

Existing expense sheets can be edited or deleted as long as they have not been submitted for approval.

Editing an Existing Expense Sheet


To edit an expense sheet:

1. Click on the **Expenses** button at the top of the screen.
2. Click the  next to the expense sheet you want to change on the **Expense Sheets** list screen, or click on the underlined name.
3. Edit the necessary information and click the Save button to save your changes.

Deleting an Expense Sheet

You can delete individual expense sheets or multiple expense sheets at one time.

To delete an individual expense sheet:

1. Click on the **Expenses** button at the top of the screen and click the  next to the appropriate expense sheet on the **Expense Sheets** list screen.
2. Web TimeSheet will confirm that you want to delete an expense sheet before removing it from the database. If you are sure you want to delete the sheet, select Yes when prompted. If you do not want to delete the expense sheet, select No to cancel the deletion and return to the **Expense Sheets** list screen.

To delete multiple expense sheets:


1. Click on the **Expenses** button at the top of the screen and select the check boxes next to the expense sheets you want to delete. If you want to delete all expense sheets, click in the **Select All** check box at the bottom of the list.
2. Click the Delete button to delete the selected expense sheets. Web TimeSheet will confirm that you want to delete the selected expense sheets before removing them from the database. If you are sure you want to delete the expense sheets, select Yes when prompted. If you do not want to delete the expense sheets, select No to cancel the deletion and return to the **Expense Sheets** list screen.

Submitting Expense Sheets

When you are finished recording your expenses, you must submit your expense sheets for approval. The approval process ensures that expenses are entered correctly for more efficient and accurate client billing and user reimbursement.

To submit your expense sheet, click the Submit button at the bottom of the expense sheet.

You can also submit expense sheets from the **Expense Sheets** list screen by selecting the corresponding check box and clicking the Submit button at the bottom of the list. Using this method, you can submit a single expense sheet or multiple expense sheets at one time.

If a supervisor, project leader, or client rejects your expense sheet, the **Expense** button will turn red and a  will be displayed in your expense sheet. You can then review the approval details, correct errors, and resubmit your timesheet for approval.

You can view expense sheets based on their approval status by selecting a view option from the Expense menu. For each option, expense sheets are identified by the period to which they apply:

Waiting for Approval

Displays a list of your submitted expenses that are waiting for approval by the appropriate supervisor, project leader(s) and/or client(s).

Note ...

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

You can use expense sheets only if you have a valid license, and have been granted a seat assignment for the Expense module.

Note ...

If a user is entering time using the In-Out timesheet, the approver will see the **Period in View** screen when viewing the timesheet details.

When you modify a user's timesheet, Web TimeSheet sends an e-mail to the user notifying them of the change.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense approvals are available only if you have a valid license for the Expense module.

Approved

Displays a list of your submitted expenses that have been approved.

Rejected


Displays a list of your submitted expenses that have been rejected. Rejected expenses must be corrected, resubmitted, and approved before they are officially closed and processed.


Paid Expenses

Once an expense sheet is approved and processed, the administrator may mark the expense sheet as "paid". The paid status indicates whether reimbursements have been paid.

You can determine whether reimbursements have been paid by selecting any of the view options above. Each list contains a column that contains the paid status.

Summary vs. Details

You can view the expense summary for a particular expense sheet directly from the list screen by clicking on the  next to the appropriate expense sheet.

To view all information for the expense sheet, click the  next to the expense sheet.

Using the Unsubmit Option

If you submit your expense sheet for approval and then discover an error within the expense sheet, you can use the unsubmit option to recover the expense sheet as long as the expense sheet is still waiting for approval. In other words, once the expense sheet has been approved, you cannot unsubmit.

The unsubmit option is available only if you have the appropriate permissions. Refer to *Chapter 9 - Administrative Functions* for further information about permissions.

Approving Timesheets and Expenses


You should decide how you want to implement approvals before setting up projects and allowing users to enter timesheets or

expenses. You can create approver types and set up approval paths that will determine the approval process for users' timesheets and expenses. Approval paths are assigned to individual users in the user profile. Refer to *Chapter 5 - Advanced Setup Options* for further information about approver types and approval paths.

Web TimeSheet sends e-mail notifications (if enabled) to inform approvers when timesheets/expenses are waiting for approval, or to inform users when timesheets have been approved/rejected.


Users can view their timesheet/expense history at any time. The timesheet/expense history is a record of old timesheets/expenses including comments and approval details.

Timesheet Approvals

Depending on the approval path assigned to the user, Web TimeSheet sends each submitted timesheet to the appropriate client, project leader, supervisor, and/or other user (e.g., time off approver) for review. The approver can review all items on the timesheet and either approve or reject the timesheet. Users know when a timesheet is rejected by the red **Timesheet** button and a  in the side menu.




Web TimeSheet sends an e-mail notification (if enabled) to the user when a timesheet is rejected. The user can then review the approval details, correct the errors, and resubmit the timesheet for approval.

Waiting Timesheets

The **Approvals** button turns red and a  is inserted in the side menu to let you know when timesheets are awaiting approval. You can display a list of these timesheets by clicking on the **Approvals** button at the top of the screen and selecting **Timesheets** under the **WAITING** heading in the side menu.

From the **Waiting Timesheet Approvals** screen you can view timesheet details, or approve/reject timesheets.

Use the following icons and buttons to perform these functions:

-  View timesheet details
-  Approve an individual timesheet
-  Reject an individual timesheet

To approve or reject multiple timesheets, select the appropriate check boxes and click the Approve or Reject button at the bottom of the screen.

Editing Timesheets

Depending on the system configuration, approvers may be able to edit timesheet information. The edit function allows the approver to change timesheet information, rather than reject the timesheet, when there is an error.

Supervisors can edit any information in the timesheet including changing tasks or time off codes, editing time entries, and adding timesheet lines.

Although project leaders may be able to view either the entire timesheet or only their tasks (depending on their permissions), they can edit only the time associated with projects/tasks for which they are the project leader. Project leaders cannot add timesheet lines or edit time off information.

Client approvers can edit only the time associated with their projects/tasks. Client approvers can neither view nor edit any timesheet information that is not directly related to their projects/tasks (including time off), and cannot add timesheet lines.

To edit a timesheet, click the Edit button on the user's timesheet. When you are finished editing the timesheet, click the Save button to save your changes or, optionally, approve or reject the timesheet. Clicking the Approve button will automatically save any changes you have made.

If your organization is DCAA compliant, you will be prompted to enter a reason for each change you make to the timesheet. Web TimeSheet will prompt you to enter a comment on a separate pop-up window. To apply the change, enter a comment and click the OK button. To cancel the change, click the Cancel button.

Change comments apply to the timesheet as a whole (timesheet level user defined fields), individual rows (task, billing, row level user defined fields), or individual dates associated with a row (hours, comments, hour level user defined fields). When you make a change at one or more of these levels, the change comments will apply to all changes made at that same level. For example, if you make multiple changes to items within the same row, you will be prompted for a comment at each change; however, the total comment will apply to all the changes you made to the row.

DCAA compliance is set at the system level. You will be prompted for change comments only if DCAA compliance is enabled. Refer to *Chapter 11 - System Configuration* for further information about DCAA compliance.

Settings


To simplify the approval process (and avoid drilling down to the details of every timesheet), you may choose to change your settings to display more information on the **Waiting Timesheet Approvals** screen.

To change your settings:


1. Click the Settings button on the **Waiting Timesheet Approvals** screen.
2. To display a column on the **Waiting Timesheet Approvals** screen, select the check box next to the field name. Note that the Details fields will display the individual totals for each client, project, and/or time off code (with separate columns for each).
3. When you are finished, click the Save button to save the new settings.

Timesheet History

To display a list of timesheets that you have approved or rejected, click on the **Approvals** button at the top of the screen and select **History - Timesheets** from the side menu.

Display the complete timesheet by clicking the  next to the appropriate user and timesheet period.

Expense Approvals

Depending on the approval path assigned to the user, Web TimeSheet sends each submitted expense sheet to the appropriate client, project leader, and/or supervisor for review. The approver can review all items on the expense sheet and either approve or reject the expense sheet.* Users know when expenses are rejected by the red **Expense** button and a  in the side menu.

Web TimeSheet sends an e-mail notification (if enabled) to the user when an expense sheet is rejected. The user can then review the approval details, correct the errors, and resubmit the expense sheet for approval.


Note ...

When you modify a user's expense sheet, Web TimeSheet sends an e-mail to the user notifying them of the change.





Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense approvals are available only if you have a valid license for the Expense module.

Waiting Expense Sheets

The **Approvals** button turns red and a  is inserted in the side menu to let you know when expense sheets are awaiting approval. You can display a list of these expense sheets by clicking on the **Approvals** button at the top of the screen and selecting **Expenses** under the **WAITING** heading in the side menu.

From the **Waiting Expense Sheet Approvals** screen you can view expense sheet details, or approve/reject expense sheets. Use the following icons and buttons to perform these functions:

-  View an expense summary
-  View expense sheet details
-  Approve an individual expense sheet
-  Reject an individual expense sheet

To approve or reject multiple expense sheets, select the appropriate check boxes and click the Approve or Reject button at the bottom of the screen.

Editing Expenses

Depending on their permissions, approvers may be able to edit expense information. The edit function allows the approver to change expense information rather than reject the expense sheet when there is an error.

Supervisors can edit any information in the timesheet including changing tasks or time off codes, editing time entries, and adding timesheet lines.


Although project leaders may be able to view either the entire expense sheet or only expenses for their projects (depending on their permissions), they can edit only the expenses associated with projects for which they are the project leader.

Client approvers can edit only the expenses associated with their projects. Client approvers can neither view nor edit any expense sheet information that is not directly related to their projects.

To edit an expense sheet, click the Edit button on the user's expense sheet. When you are finished editing the expense sheet, click the Save button to save your changes or, optionally, approve or reject the expense sheet. Clicking the Approve button will automatically save any changes you have made.

Expense History

To display a list of expense sheets that you have approved or rejected, click on the **Approvals** button at the top of the screen and select **History - Expenses** from the side menu.

Display the complete expense sheet by clicking the  next to the appropriate user and date.

Project Notes

You can use project notes to post notes about the progress of a specific project. Other users can then review the notes to find information that pertains to their projects.

Project notes can be viewed by project or by user. Project leaders may want to view by project, to determine how their projects are progressing. Users may want to view by user to review their own notes and to post updates.

Adding Project Notes

Adding project notes will allow you to post information about the status of a project or task. Any user can review your project notes provided they have the appropriate permissions. To add a project note:


1. Click on the **Projects** button at the top of the screen and select **Add Project Notes** from the side menu.
2. On the **Add a New Project Note** screen, select a project from the drop-down box for which you are adding the note.
3. Enter the subject of the note and the note text. The subject is a brief description of the information contained in the note. Note text can be as brief or descriptive as necessary.
4. When you are finished, click the Add button at the bottom of the screen.


List Notes by Project

You can view notes by project to find notes relevant to the projects you are working on. To view notes by project:

1. Click on the **Projects** button at the top of the screen and select **List Notes by Project** from the side menu.

2. The **Filter by Date** screen allows you to list all project notes, or filter the project notes based on a specific time period. If you are working with a very large list of project notes, you may want to filter the list. You can filter the list for any period of time.
3. When you are ready to view a list of project notes, click the List Project Notes button at the bottom of the screen.


The **List Project Notes by Projects** screen displays all project notes for the dates you specified. To view the details for a specific note, click the  next to the note.


You can delete a project note by clicking the  next to the note you want to delete. Web TimeSheet will confirm that you want to delete the note. If you are sure you want to delete the project note, select Yes. If you do not want to delete the project note, select No to return to the List Notes by Project screen.

List Notes by User

You can view notes by user if you want to see only those task notes entered by a specific user. For example, you may want to review or update one of your own task notes. Viewing by user will allow you to find your own task notes quickly and easily. To view notes by user:

1. Click on the **Projects** button at the top of the screen and select **List Notes by User** from the side menu.
2. The **Filter by Date** screen allows you to list all task notes, or filter the task notes based on a specific time period. If you are working with a very large list of notes, you may want to filter the list. You can filter the list for any period of time.
3. When you are ready to view a list of notes by user, click the List Project Notes button at the bottom of the screen.

The **List Project Notes by User** screen displays all project notes for the dates you specified. To view the details for a specific note, click the  next to the note.

You can delete a project note by clicking the  next to the note you want to delete. Web TimeSheet will confirm that you want to delete the note. If you are sure you want to delete the project note, select Yes. If you do not want to delete the project note, select No to return to the List Notes by User screen.

Chapter 7 - User Configuration

Note ...

If you change the Timesheet Name Display (*Preferences*), make sure you select at least two options that will create a project/task combination, such as *Project Name* and *Task Name*. Selecting only one option, or multiple options in a project/project or task/task combination, will prevent you from adding tasks to your timesheet from the **Add/Remove Tasks** screen (except *Full Path Name* and *Full Path Code*).

If you are using Windows NT Authentication, you will not have the option to change your password.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Offline TimeSheet features are available only if you have a valid license, and have been granted a seat assignment for the Offline TimeSheet module.

Introduction

The user configuration is a set of preferences that determine how information is displayed in Web TimeSheet. Although the system administrator can set the configuration at a global level (see *Chapter 9 - Administrative Functions*), each user, if given appropriate permissions, can override these global settings.

Users can customize their settings from the **Configuration** menu. From this menu users can also set up substitute users to complete tasks on their behalf. The Configuration menu contains the following options:

- Preferences
- Change E-Mail
- Change Password
- Substitute User

Setting Your Preferences

To customize your display settings, click on the **Config** button at the top of the screen. The **Preferences** screen is displayed. Edit your preferences and click the Save button when you're finished.

Changing Your E-mail Address or Password

E-mail addresses can be added to the user's profile either by the administrator (through the **Administration** menu) or by the individual user.

When a user changes his/her e-mail address on the **Change E-mail Address** screen, the e-mail address is automatically changed in the user's profile.

To add or change your e-mail address, click on the **Config** button at the top of the screen and select **Change E-Mail** from the side menu. Enter the new e-mail address and click the Save button when you are finished.

You may have more than one e-mail address (internal and external). The internal e-mail address is where you will receive Web TimeSheet e-mail notifications and broadcast messages. The external e-mail address is where you will receive offline timesheets.

You will be able to change your external e-mail address only if you meet the following conditions:

- your company has a valid license for the Offline TimeSheet module
- you have been granted a seat assignment for this module
- you have permission to change your external e-mail address.

You can also change your Web TimeSheet password. This is the password you will use when you log into the system. To change your password, select **Change Password** from the side menu. You will be required to enter your current password and new password, and confirm the new password by retyping it in the provided field. When you are finished, click the Change button. Web TimeSheet will confirm that your password has been changed.

Setting Up Substitute Users

A user can authorize another user to manage his/her tasks by assigning a substitute user. Each user can have multiple substitutes with different permissions. Each substitute user's permissions are determined by the user who sets up the substitute. A substitute user can also receive e-mail notifications for permitted actions.

For example, if John Smith assigns Martha Brown as his substitute and gives Martha the ability to enter his timesheets, John also can enable timesheet notifications so Martha will know when John's timesheet is due.

Substitute permissions include:

Timesheet

Timesheet permission allows the substitute to enter timesheet tasks, time off, and comments on the user's behalf.

Expenses

Expenses permission allows the substitute to enter expenses on the user's behalf.

Approvals


Approvals permission allows the substitute to approve timesheets/expenses on the user's behalf. The substitute does not have to be an approver (user profile access rights) to be given approval permission.

Full (Your Access)

Full (Your Access) permission allows the substitute to do anything the user can do. This may include, but is not limited to, the other three permissions.

Adding and Editing Substitute Users


Adding a substitute user will ensure that your regular tasks (e.g., timesheet entry, approvals) are completed in your absence. To add a substitute user:

1. Click on the **Config** button at the top of the screen and select **Substitute Users** from the side menu.
2. Click the Add button to create a new substitute user.
3. Select a user from the drop-down list or by clicking the  and selecting a user from the **User Select** screen.
4. You can enter a start and end date if you want to limit the amount of time the substitute user can act on your behalf. For example, you may want this substitute to enter your timesheet only while you are on vacation.

If you do not enter a start and end date, the substitute user will remain effective indefinitely (or until you add an end date or remove the user altogether). You can still log into the system and complete the necessary work while the


substitute user is effective. This feature is useful for executives who prefer to have an assistant enter and approve timesheets and expenses, but still want to log into the system to view report data.

5. Use the Permissions section to specify the type of access you want to allow the substitute. Selecting "Full" will grant the same type of access that has been set up for you in your user profile.
6. You may want to forward e-mail notifications to your substitute user, especially if you are going on vacation and want to ensure the necessary work is completed. If you forward notifications, you will not receive copies of these e-mails.
7. When you are finished setting up the substitute user, click the Add button at the bottom of the screen.

You can modify the details for substitute users at any time by clicking the  next to the name of the substitute user you want to change. Modify the information for the selected substitute and click the Save button when you are finished.

Deleting Substitute Users

You can delete substitute users at any time. Deleting a substitute user will remove that user's access to your information.


To delete a substitute user, click the  next to the user you want to delete on the **Substitute Users** screen. Web TimeSheet will confirm that you want to delete a substitute user before removing it from the database. If you are sure you want to delete the user, select Yes when prompted. If you do not want to delete the substitute user, select No to cancel the deletion and return to the **Substitute Users** screen.

Logging in as a Substitute User

When you are set up as a substitute user, you still can log into the system using your own login id and password. After logging in, you will be asked how you want to continue. You can continue either by logging in as yourself (accessing your own timesheet data using your own permissions), or logging in as a substitute for another user.

To continuing logging in as yourself, simply click the Continue Login button on the **Select User Login** screen.

Note ...

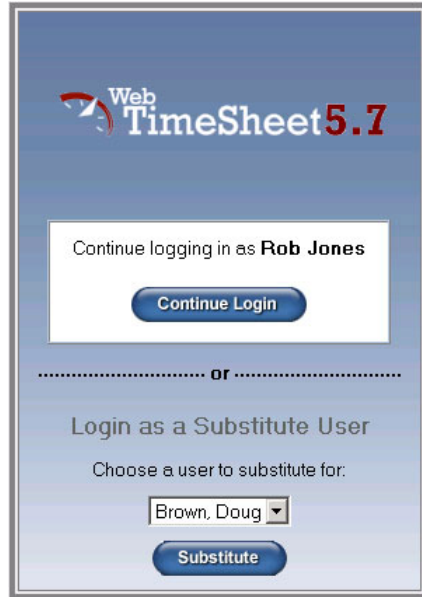
The system preferences determine whether user names are displayed in the drop-down list. A  is displayed only if system preferences do not allow the users to be displayed in the drop-down list.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Note ...

When you are logged in as a substitute user, the background on all Web TimeSheet screens reminds you of your substitute status.

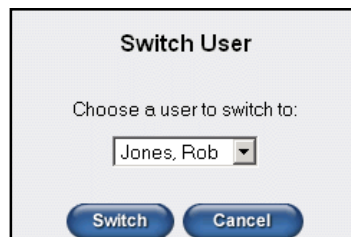
To log in as a substitute user, select the name of the user for whom you wish to log in and click the Substitute button on the **Select User Login** screen. Once you have logged in as a substitute, you will have the access you need to complete the necessary tasks for that user.



The screenshot shows the Web TimeSheet 5.7 login interface. At the top, it says 'Web TimeSheet 5.7'. Below that, there is a section for 'Continue logging in as Rob Jones' with a 'Continue Login' button. A dotted line with 'or' in the center separates this from the 'Login as a Substitute User' section. This section prompts the user to 'Choose a user to substitute for:' and features a dropdown menu currently showing 'Brown, Doug' and a 'Substitute' button.

Whether you log in as yourself or as a substitute for another user, you can easily switch between users by clicking the **Switch User** link at the top of the Web TimeSheet screen. The **Switch User** pop-up window will provide a drop-down list of all the users for whom you are a substitute.

Just select a user name and click the Switch button to log in as the substitute for that user.



The 'Switch User' pop-up window has a title bar that says 'Switch User'. It contains the text 'Choose a user to switch to:' followed by a dropdown menu showing 'Jones, Rob'. At the bottom of the window are two buttons: 'Switch' and 'Cancel'.

Chapter 8 - Reports

Introduction

Reports are helpful for determining how time is utilized throughout your organization and for reviewing project costs and client billing. You can generate reports to review detailed or summarized data.

All reports can be customized by filtering data and selecting report settings. Filters allow you to extract data based on specific selection criteria such as client name or project. Report settings include the following:

- **Data Grouping**
Data grouping allows you to view the same information in various ways. For example, if you are viewing a Project Status report, you may want to group the information first by project, then by task, then by the users working on that task. Or, you may group by project, then user, then the tasks for each user. Subtotals are calculated for each group level, where appropriate. Grouping options are provided with most reports.
- **Field Select**
Field selection determines which fields are displayed in the report. Each report comes with a default setting that you can change to meet your needs.
- **Details vs. Consolidated**
The detail and consolidated options allow you to view detailed report information or summarized information. Each report defaults to detailed.
- **Export Report Criteria**
This option allows you to export the report criteria (filters, grouping) when exporting report data to Microsoft Excel.

Once you have generated a customized report, you can save that report for public or private use. Public reports are available to all users who have access to reports. Private reports are available only to the user who creates them.

Generated reports can be reviewed in Web TimeSheet, printed, or exported to a Microsoft Excel spreadsheet for further editing/review.

To access Web TimeSheet reports, click on the **Reports** button at the top of the screen and select a report from the side menu.

Customizing Reports

You can customize report filters and settings so you can view the information you need, in the format you want.

Filtering Report Data

To filter report data, select an item from one of the filter drop-down lists at the top of the screen. Click the Generate button to regenerate the report with the filters you selected.

Customizing Report Settings

You can customize your report settings by grouping report data or selecting fields to be displayed. To access report settings, click the Settings button at the top of the screen. From here you can choose grouping options, select fields, or switch between detailed and consolidated reports.

The **Fields** tab allows you to choose which fields are displayed on the report. If you select certain fields, then change your mind, simply reset the fields to restore the default settings.

The **Grouping** tab displays all the grouping options for the report. Grouping options determine how you view the report information. For example, if you are viewing a Project Status report, you may want to group the information first by project, then by task, then by the users working on that task. Totals for fields such as billable and non-billable hours would then be calculated at the user level first, then the task level, and finally, at the project level.

When you are finished customizing your report settings, click the OK button to save the new settings and regenerate the report.

Note ...

Click the Generate button to refresh the report data with the latest filters and/or settings. Changing and saving the report settings also will automatically generate the report, unless your organization has chosen to not automatically generate reports (System Preferences).

Refer to *Chapter 11 - System Configuration* for further information about setting up Web TimeSheet to automatically generate reports.

Note ...

When saving a public report, you must enter a unique name and description. If the name and description are the same as those for another report, the names will be duplicated in the Web TimeSheet permissions and may cause confusion.

When saving a customized report, it is recommended that the report name and description are the same. The report name will be used to identify the report in the **Reports** menu, while the description will be used to identify the report on the **Reports** tab of the **Add/Edit Permission** screen.

Refer to *Chapter 10 - System Security* for further information about permissions.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Saving Customized Reports

You can customize and save frequently used reports in public or private folders. Public reports are reports that can be accessed by any user with report permissions. Private reports are accessible only by the user who creates them.

Only users with appropriate permissions can create public reports. When a public report is created, access to the report will, by default, be granted based on the access rights for the original report. The administrator can override this default by editing the permissions after the customized report has been saved.

Users who do not have permission to save public reports can still create private reports for their own use. Once saved, a private report cannot be used to create an additional customized private report. You must use the original report to create additional customized reports.

When you save public reports, you must choose a location for the report. To save reports:

1. Customize the report and click the Save button the top of the screen.
2. Enter the report name and description. The report title is optional.
3. Select the location for the new report. Public reports can be saved under any heading in the side menu (e.g., Billing). Private reports are always saved under Private Reports.
4. When you are finished, click the OK button.

Deleting Customized Reports

You can delete previously saved public and private reports by clicking at the top of the report. When you delete a public report, all customized reports (public or private) associated with that report are also deleted.

You cannot delete the existing Web TimeSheet reports; however, you can hide these reports from specific users by removing their permission to view the reports. If you remove a user's permission to view an existing Web TimeSheet report (not a customized report), the user will also lose permission to view any customized reports based on that Web TimeSheet report.

Web TimeSheet Reports

The following sections contain descriptions of the reports available in Web TimeSheet. Each section represents a separate heading in the Reports menu.

Timesheet Reports

Timesheet reports are designed to analyze timesheet data and determine the status of users' timesheets.

Status

The Status report generates a list of users' timesheets for a specified date range or timesheet period and indicates the status of each timesheet. The report data can be filtered by time period, department, user group set, user group, and approval status.

Awaiting Approval

The Awaiting Approval report generates a list of approvers who need to approve timesheets for a specified date range or timesheet period. The report includes the names of all users for whom a timesheet is awaiting approval by the specified approver. The report data can be filtered by time period, department, user group set, and user group.

Comments

The Comments report generates a list of timesheets and attached comments for a specified date range or timesheet period. The report data can be filtered by time period, client, project, and approval status.

The following reports are custom reports that have been pre-configured with different views of the Comments report:

- Timesheet Comments (Own)
- Timesheet Comments (Team)
- Timesheet Comments (Project)

Unlike the standard Comments report (and other standard Web TimeSheet reports), the pre-configured custom reports can be deleted. For instructions on deleting custom reports, refer to *Deleting Customized Reports* in the previous section.

Timesheet Audit Trail

The Timesheet Audit Trail report provides a complete history of all actions performed on a timesheet after submission. The report includes changes *after* submission because the timesheet does not become a legal document until it is submitted for approval. From that point forward, all initial entries and changes (with comments, if applicable) are tracked in the Timesheet Audit Trail report.

The Timesheet Audit Trail report can be filtered by time period, user, department, supervisor, user group set, and user group.

Timesheet Detail

The Timesheet Detail report includes detailed information about each user's timesheet. The report data can be filtered by time period, user, department, supervisor, user group set, and user group.

The following reports are custom reports that have been pre-configured with different views of the Timesheet Detail report:

- Timesheet Detail (Own)
- Timesheet Detail (Team)
- Timesheet Detail (Project)

Unlike the standard Timesheet Detail report (and other standard Web TimeSheet reports), the pre-configured custom reports can be deleted. For instructions on deleting custom reports, refer to *Deleting Customized Reports* in the previous section).

Billing Reports

Billing reports are designed to analyze billing information so invoices can be created quickly and easily.

Timesheet Billing

The Timesheet Billing report generates a list of clients to be billed for a selected date range or timesheet period. The report includes the projects for which the client is being billed, all billable and non-billable hours recorded in users' timesheets, rate information, and the billable amount. The report can be filtered by time period, client project, department, and approval status.

Expense Billing Summary

The Expense Billing Summary report generates a list of clients to be billed for expenses incurred within a selected date range. The report includes the projects against which expenses were incurred and the billable amount. The report can be filtered by client, project, user, time period, and approval status.

Expense Billing Detail

The Expense Billing Detail report generates a list of clients to be billed for expenses incurred within a selected date range. The report provides detailed information about the expenses incurred, including a breakdown of the expense (net, tax, total amount). The report can be filtered by client, project, user, time period, and approval status.

Project Status Reports

The Project Status reports are used to analyze project status information.

Summary

The Summary report generates a high level list of projects and their status as of today's date. The report includes all information for the projects from the date the project is created. Report data can be filtered by client, project, project leader, project status, approval status, and time period.

Detailed (Task)

The Detailed (Task) report generates a list of projects, their associated tasks, and the status of each task as of today's date. The report data can be filtered by client, project, project leader, task status, approval status, and time period.

Detailed (Task-User)

The Detailed (Task-User) report generates a list of projects, their associated tasks, and the status as of today's date. The tasks are further broken down by user, indicating who worked on each task. The report data can be filtered by client, project, project leader, user, department, task status, approval status, and time period.

Note ...

User group filters are available only if you have a valid license of the User Grouping module.

Expense reports (including billing and detailed project status) are available only if your Web TimeSheet license includes the Expense module.

Note ...

User group reports and filters are available only if you have a valid license of the User Grouping module.

If you **are not** using the option to roll up project/task estimates, the total estimated cost is calculated as the sum of all estimates (including the project) converted to the base currency using the exchange rate at the time the report is run.

If you **are** using the option to roll up project/task estimates, the total estimated cost is calculated as the sum of all estimates converted to the base currency using the exchange rate specified for the date the last cost estimate was entered (for each currency type).

For example:


The base currency is USD. For Project A, Task1 and Task2 have estimates in CDN. The estimate for Task 1 was entered on February 1. The estimate for Task 2 was entered on February 11. When the values are rolled up, both estimates will be converted to base currency at the exchange rate for February 11.


Detailed (User Group)

The Detailed (User Group) report generates a list of projects, their associated tasks, and the status as of today's date, broken down by user group set and/or user group. Each group is then broken down by user.

The report can be filtered by time period, tasks with zero hours, client, project, project leader, user, department, task status, and approval status.

An advanced filtering option allows the creation of advanced queries, which can be used to generate a report for more than one user group at a time. To create advanced user group queries:

1. From within the Project Status Detailed (User Group) report, click the Advanced Filters button at the top of the screen.
2. On the **Advanced User Group Query Setup** screen, click the Add button to add a new query condition set. A single row will appear where you can set up the first condition.
3. Select the user group information you want to include in the query. To add more conditions, select the  next to the first condition. Each time you add another condition line, you must clarify the relationship between the new condition and the one before it (AND/OR). AND will search for data that matches both conditions, whereas OR will search for data that matches either of the conditions.

To delete a condition line, simply select the  next to the line you wish to delete.

4. If you want to set up a query with multiple sets of conditions, click the New button to create a new set of conditions. You'll note that a drop-down list appears between the two sets of conditions. You will need to specify the relationship between them (AND/OR).

To delete a condition set, simply click the Delete button at the bottom of that set.

5. When you are finished setting up your query, click the Save button to save the information.

You can add as many condition sets as you need; however, the more detailed the query, the more time the report will need to process the information.

Project Team Assigned

The Project Team Assigned report generates a list of all users attached to each project and the users' departments and supervisors. The report data can be filtered by client, project, department, user group set, user group, and project status.

Task Assignments

The Task Assignments report generates a list of all assignments associated with specific projects/tasks. The assignments are broken down by project/task and assignment, including detailed information about the user/group assigned (employee id, e-mail address, supervisor, etc.). The report data can be filtered by client, project, department, user group set, user group, and project status.

This report includes all assignments, including users/departments who have been explicitly denied access to the project/task.

Task Assignment Details

The Task Assignment Details report generates a detailed list of assignments associated with specific projects/tasks. The report includes only users/groups who have been allowed access to the project/task, both explicitly (directly assigned to the project/task) or implicitly (have access through a group assignment - users gain access through their department, departments gain access through <All>).

Detailed information is provided for each assignment. For users/groups with implicit access, the report will also identify the group through which implicit access is allowed.

The report data can be filtered by client, project, user, department, user group set, user group, and project status.

Project Team Actual

The Project Team Actual report generates a list of all users who have entered time against a project and their billable and non-billable hours. The report data can be filtered by client, project, department, user group set, user group, and project status.

Detailed (Expense)

The Detailed (Expense) report generates a list of projects and the expenses entered for that project, and displays the status of each expense. The report data can be filtered by client, project, project leader, approval status, and time period.

Detailed (Expense-User)

The Detailed (Expense-User) report generates a list of projects, expenses entered against the project, and the status as of today's date. The expenses are further broken down by user, indicating who entered each expense. The report data can be filtered by client, project, project leader, department, user, approval status, and time period.

Project/Task Progress

The Project/Task Progress report is a list of projects/tasks and the status of their progress. The progress data is determined based on the estimated hours entered for the project/task and the number of hours recorded against the project/task as of the last day in a specified time period. Project/task status includes such data as the total estimated hours, the number of actual hours worked, the number of hours remaining, and the percentage of work completed.

The report data can be filtered by client, project, project leader, and time period.

Productivity Reports

Productivity reports are designed to analyze utilization data based on the billable targets set up for each user.

Summary

The Summary report generates a list of users, their billable targets, and actual billable hours. The report can be filtered by year, month, and department.

Detailed

The Detailed report generates a list of users and calculates each user's average utilization rate by comparing the billable target to the user's actual billable hours (recorded in timesheets). The report can be filtered by year, month, and department.

Expense

Expense reports are designed to analyze expense data and determine the status of users' expense sheets.

Status

The Status report generates a list of users' expenses for a specified date range and indicates the status of each expense. The report data can be filtered by department, user, time period, approval status, and paid status.

Awaiting Approval

The Awaiting Approval report generates a list of supervisors, project leaders, and/or clients who need to approve expenses for a specified date range. The report includes the names of all users for whom expenses are awaiting approval by that supervisor, project leader, or client. The report data can be filtered by department and time period.

Reimbursements

The Reimbursements report generates a list of expense for which users require reimbursements. The report data can be filtered by department, user, time period, approval status, and paid status.

Administration Reports

Administrative reports are designed to analyze administrative information including user vacation, time off, and details from the users' profiles.

License Seat Assignment

The License Seat Assignment report generates a list of Web TimeSheet users and their seat assignments (for modules that use seat based license keys). The report can be filtered by user, department, supervisor, user group set, user group, login status, and module.

User Detail

The User Detail report generates a list of Web TimeSheet users and their user profile information. The report can be filtered by department, supervisor, user, user group set, user group, and login status.

Note ...

Expense reports (are available only if you have a valid license for the Expense module.

Productivity reports are available only if you have a valid license for the ProMax module.

User group filters are available only if you have a valid license for the User Grouping module.

Note ...

User group filters are available only if you have a valid license for the User Grouping module.

Expense reports are available only if you have a valid license for the Expense module.

Time Off

The Time Off report generates a list of users and their current time off status (vacation, sick, etc.) for a specified date range or timesheet period. Time off totals can be displayed in hours and/or days. Time off totals can be displayed in hours and/or days. The report data can be filtered by time period, user, department, supervisor, and time off code.

User Time Off

The User Time Off report generates a list of users and their current time off status (allowed days, days used, days remaining, etc.). Time off can be displayed in hours and/or days. The report data can be filtered by department, supervisor, user, login status, and time off code.

Time Off Comments

The Time Off Comments report generates a list of comments attached to time off entries in users' timesheets. The report data can be filtered by time period and approval status.

User Holidays

The User Holidays report generates a list of holidays assigned to various users. The report data can be filtered by department, supervisor, user, login status, holiday calendar, and time period.

Time Off History

The Time Off History report generates a list of the changes that have occurred for each user's time off. The report includes all automatic accruals, days taken (as entered in the user's timesheets), and manual modifications since the reset ("as of") date. This means that if a user's vacation is reset on January 1, the Time Off History report will show only those changes that occurred on or after January 1.

The report data can be filtered by department, supervisor, user, user group set, user group, and time period.

Substitute Users

The Substitute Users report generates a list of the substitutes that have been set up for specific users. The report includes the substitute start and end dates, permissions, and forwarded notifications.

The report data can be filtered by user, department, supervisor, and login status, and may include either active substitute users, or all substitutes whose start/end dates fall within a specified date range.

Raw Data Export Reports

Raw Data Export reports are designed to provide all fields necessary to export raw data for timesheets, projects, and expenses to an Excel spreadsheet.

Raw Data Export reports have no grouping options.

Timesheet

The Timesheet Raw Data Export generates a report of all time entered in the system and the associated information (users, clients, projects, approvals, etc.). The report can be filtered by time period, approval status, client, project, user, approver, and time off code.


Project

The Project Raw Data Export generates a report of all projects in the system and the associated information (project leaders, rates, tasks, project teams, expenses, etc.). The report can be filtered by client, project, project leader, and task status.

Expense

The Expense Raw Data Export generates a report of all expenses in the system and the associated information (date, description, user, amount, reimbursement amount, etc.). The report can be filtered by time period, approval status, client, project, user, supervisor, and expense type.

Pivot Reports

Pivot reports use the Microsoft Excel PivotTable and PivotChart features to provide easy to use customization options and the ability to generate graphical representations of report data. For specific information about using the Pivot reports, click on the Microsoft Help icon  in the Pivot report toolbar, or refer to your Microsoft Excel user documentation.

Each Pivot report provides dual filtering options - raw data filtering and loaded data filtering. This means that before you generate a Pivot report, you will need to select the data you want to extract from the Web TimeSheet database (defaults are provided). Once the pivot report has loaded the filtered raw

data, you can create your own filters within PivotTable itself (PivotTable allows any field to be used as a filter with multi-select functionality).

To use the Pivot reports, ActiveX must be enabled in your internet options (only available with Internet Explorer for Windows version 5.0 or higher), and you must have version 10 of the Microsoft Office Web Components installed on your local machine. Microsoft Office Web Components are available for download on the Microsoft website. It is recommended that you review the Microsoft website for further information about the compatibility and licensing requirements for Microsoft Office Web Components.

Timesheet

The Timesheet pivot report generates a list of timesheets for Web TimeSheet users. The raw data can be filtered by time period and approval status.

Timesheet Billing

The Timesheet Billing pivot report includes information about billable hours recorded in users' timesheets. The raw data can be filtered by time period, client, and project.

Project Status - Hours

The Project Status - Hours pivot report compares project actual and estimated hours to allow the project leader to track the project's progress. The raw data can be filtered by client and project.

Project Status - Cost

The Project Status - Cost pivot report compares project actual and estimated cost to allow the project leader to track the project's progress. The raw data can be filtered by client and project.

Expense

The Expense pivot report generates a list of expenses incurred by Web TimeSheet users. The raw data can be filtered by department and user.

Time Off

The Time Off pivot report provides time off information for users and departments, including days/hours remaining, days/hours taken, and total days allowed. The raw data can be filtered by department, user, login status, and time off code.

Reports Field Matrix

The Reports Field Matrix is a list of fields available in each of the Web TimeSheet reports. The fields are grouped based on the area of Web TimeSheet to which they apply (users, projects, etc.) and are identified as fields or grouping options (grouping options are always available as actual report fields, as well).

The Reports Field Matrix is provided in the online Help for Web TimeSheet, as well as in the Documentation Library on the Replicon website.

Note ...

To use the Pivot reports, ActiveX must be enabled in your internet options, and you must have version 10 of the Microsoft Office Web Components (available free from the Microsoft website) installed on your local machine.

It is recommended that you review the Microsoft website for further information about the requirements for Microsoft Web Components.

To avoid the occurrence of security pop-up warnings, it is recommended that you make the Web TimeSheet server a trusted site in your Internet options. If you are not sure how to do this, refer to your Internet Explorer user documentation or contact your system administrator.

Note to administrator: You can use Active Directory to make Web TimeSheet a trusted site for multiple users at once.

Chapter 9 - Historical Timesheets and Expenses

Note ...

You must have appropriate permission to edit a user's timesheet from the **Historical Timesheets** screen.

Offline timesheet features are available only if you have a valid license for the Offline TimeSheet module.

Filter criteria are saved during the same Web TimeSheet session; however, basic settings will not transfer to the advanced settings (and vice versa).

Introduction

As the Administrator, you can manage any timesheets and expense sheets that have been saved in the system, including approving, opening/closing, and deleting selected (or all) timesheets and expense sheets.

Historical Timesheets

You can view a list of Historical Timesheets in the system by clicking on the **Admin** button at the top of the screen and selecting **Historical Timesheets** from the side menu. You can use this list to view details, submit, re-open, edit, approve, reject, or delete selected timesheets. You can also request that offline timesheets be sent to specific users.

The Basic Filter section provides common fields you may use to limit the displayed timesheet list. To use these filters, select an item from one or more of the drop-down lists and click the Apply button. The screen will refresh with the filtered data.


To specify more advanced search criteria:

1. Click the Advanced Filter button to display the Advanced Filter section.
2. The Advanced Filter section provides common fields as well as more detailed fields you can use to limit your list of timesheets. If you enter criteria in the text fields, Web TimeSheet will search for any timesheets containing the text in the same order you entered it. For example, if you search for "doug" in the User Name field, the search will return any timesheets for users with "doug" in their first or last name.
3. When you are finished entering the necessary search criteria, click the Apply button. The list of timesheets will refresh based on the criteria you specified.

4. To restore the original list, click the Reset button. The Reset button restores all filters to their default settings. To apply the default settings, click the Apply button (clicking the Reset button does not automatically apply the restored filters).

View Timesheet Details

To view timesheet details:

1. Click on the **Admin** button at the top of the screen and select **Historical Timesheets** from the side menu.
2. Click on the  next to the appropriate timesheet. The full timesheet is displayed.

Submit or Re-open a Timesheet

A timesheet must be submitted for approval and officially approved before the timesheet can be closed. A closed time sheet cannot be edited by the user and/or approver(s).

You can always re-open timesheets that have been submitted. You can submit and re-open timesheets from the **Historical Timesheets** screen.

To submit a timesheet:


1. Click on the **Admin** button at the top of the screen and select **Historical Timesheets** from the side menu.
2. Select the check box next to the timesheet you want to close. You can select more than one timesheet or select all timesheets by clicking the Select All check box at the bottom of the screen.
3. Click the Submit button at the bottom of the timesheet list. Web TimeSheet will confirm that you want to submit and close the timesheet(s). If you are sure you want to close the timesheet(s), select Yes when prompted. If you do not want to close the timesheet(s), select No to cancel the process and return to the Historical Timesheets screen.

To re-open a closed timesheet, follow steps 1 and 2 for closing a timesheet. Then click the Re-open button at the bottom of the list. Web TimeSheet will confirm that you want to open the selected timesheet(s). If you are sure you want to open the timesheet(s), select Yes when prompted. If you do not want to open the timesheet(s), select No to cancel the process and return to the **Historical Timesheets** screen.

When you re-open a timesheet, it will be sent back to the user. The user can then edit the timesheet and submit it for approval. If the user resubmits the timesheet without making changes, the timesheet will be automatically approved by the system (i.e., the approval process will not be restarted).

Edit a Timesheet

If a submitted timesheet contains errors, you can modify the timesheet information rather than returning the timesheet to the user to be corrected. To edit a timesheet:

1. View the timesheet details by clicking the  next to the user's name on the **Historical Timesheets** screen, or click on the user's underlined name.
2. Click the Edit button on the **Timesheet** screen. The timesheet will open in entry mode, allowing you to make the necessary changes.
3. When you are finished, you can approve or save the timesheet by clicking the appropriate button. Clicking will cancel the process without saving any of your changes.

When you modify a user's timesheet, Web TimeSheet sends an e-mail to the user notifying them of the change.

Approve Timesheets

When you approve timesheets from the **Historical Timesheets** screen, the timesheets will not be submitted to the approvers in the user's approval path.

To approve timesheets:

1. Click on the **Admin** button at the top of the screen and select **Historical Timesheets** from the side menu.
2. Select the check box next to the timesheet you want to approve. You can select more than one timesheet or select all timesheets by clicking the **Select All** check box at the bottom of the screen.

3. Click the Approve button at the bottom of the timesheet list. Web TimeSheet will confirm that you want to approve the selected timesheet(s). If you are sure you want to approve the selected timesheet(s), select Yes when prompted. If you do not want to approve the timesheets, select No to cancel the approval and return to the Historical Timesheets screen.

Reject Timesheets

When you reject timesheets from the **Historical Timesheets** screen, the timesheets are sent back to the user to correct errors and resubmit the timesheet. When the user resubmits the timesheet, it will restart the approval process.


To reject timesheets:

1. Click on the **Admin** button at the top of the screen and select **Historical Timesheets** from the side menu.
2. Select the check box next to the timesheet you want to reject. You can select more than one timesheet or select all timesheets by clicking the Select All check box at the bottom of the screen.
3. Click the Reject button at the bottom of the timesheet list. Web TimeSheet will confirm that you want to reject the selected timesheet(s). If you are sure you want to reject the timesheet(s), select Yes when prompted. If you do not want to reject the timesheets, select No to cancel the rejection and return to the Historical Timesheets screen.

Delete a Timesheet

You can delete a timesheet from the **Historical Timesheets** screen. Deleting a timesheet will remove all data entered for that timesheet period. Deleting a timesheet is irreversible. You can delete a single timesheet or multiple timesheets at once.

To delete a single timesheet:

1. Click on the **Admin** button at the top of the screen and select **Historical Timesheets** from the side menu.
2. Click the  next to the timesheet you want to delete. Web TimeSheet will confirm that you want to delete the selected timesheet. If you are sure you want to delete the timesheet, select Yes when prompted. If you do not want to delete the timesheet, select No to cancel the process and return to the **Historical Timesheets** screen.

Note ...

You can access the **Historical Expenses** screen only if you have a valid license for the Expense module.

You must have appropriate permission to edit a user's expense sheet from the **Historical Expenses** screen.

Filter criteria are saved during the same Web TimeSheet session; however, basic settings will not transfer to the advanced settings (and vice versa).

To delete multiple timesheets:

1. Click on the **Admin** button at the top of the screen and select **Historical Timesheets** from the side menu.
2. Select the check boxes next to the timesheets you want to delete. If you want to delete all timesheet periods, click in the Select All check box at the bottom of the timesheet list.
3. Click the Delete button at the bottom of the screen. Web TimeSheet will confirm that you want to delete the selected timesheets. If you are sure you want to delete the timesheets, select Yes when prompted. If you do not want to delete the timesheets, select No to cancel the process and return to the **Historical Timesheets** screen.

Request Offline TimeSheets

If a user is away from the office and needs an offline timesheet for a specific timesheet period, you can send the user an offline timesheet from the **Historical Timesheets** screen. Refer to the Offline TimeSheet User Guide for further information about requesting offline timesheets.

Historical Expenses

You can view a list of expense sheets by clicking on the **Admin** button at the top of the screen and selecting **Historical Expenses** from the side menu. You can use this list to view details, submit, re-open, edit, approve, reject, or delete the expense sheets entered during a specific time period. You can also mark expense sheets as "paid", indicating that the expense sheet has been processed and any necessary reimbursements have been paid.

The Basic Filter section provides common fields you may use to limit the displayed expense sheet list. To use these filters, select an item from one or more of the drop-down lists and/or enter a From or To date and click the Apply button. The screen will refresh with the filtered data.


To specify more advanced search criteria:

1. Click the Advanced Filter button to display the Advanced Filter section.

2. The Advanced Filter section provides common fields as well as more detailed fields you can use to limit your list of expense sheets. If you enter criteria in the text fields, Web TimeSheet will search for any expense sheets containing the text in the same order you entered it. For example, if you search for "doug" in the User Name field, the search will return any expense sheets for users with "doug" in their first or last name.
3. When you are finished entering the necessary search criteria, click the Apply button. The list of expense sheets will refresh based on the criteria you specified.
4. To restore the original list, click the Reset button. The Reset button restores all filters to their default settings. To apply the default settings, click the Apply button (clicking the Reset button does not automatically apply the restored filters).

View Expense Details

To view expense details:

1. Click on the **Admin** button at the top of the screen and select **Historical Expenses** from the side menu.
2. Click the  next to the appropriate expense sheet to view a list of expenses included in that expense sheet.
3. In the expense sheet, click the Detail button next to the individual expense for which you want to view details. The expense details will be displayed only for the selected expense.

Submit or Re-open an Expense Sheet

An expense sheet must be submitted for approval and officially approved before the expense sheet can be closed. A closed expense sheet cannot be edited by the user and/or approver(s).

You can always re-open expense sheets that have been submitted. You can submit and re-open expense sheets from the **Historical Expenses** screen.

To submit an expense sheet:

1. Click on the **Admin** button at the top of the screen and select **Historical Expenses** from the side menu.


2. Select the check box next to the expense sheet you want to close. You can select more than one expense sheet, or select all expense sheets by clicking the **Select All** check box at the bottom of the screen.
3. Click the Submit button at the bottom of the list. Web TimeSheet will confirm that you want to submit the expense sheets, thus closing them to further changes. If you are sure you want to close the expense sheet(s), select Yes when prompted. If you do not want to close the expense sheet(s), you can select No to cancel the process and return to the **Historical Expenses** screen.

To re-open an expense sheet, follow steps 1 and 2 for closing an expense sheet. Then click the Re-open button at the bottom of the list. Web TimeSheet will confirm that you want to re-open the selected expense sheets. If you are sure you want to re-open the expense sheet(s), select Yes when prompted. If you do not want to re-open the expense sheet(s), you can select No to cancel the process and return to the **Historical Expenses** screen.

When you re-open an expense sheet, it will be sent back to the user. The user can then edit the expense sheet and submit it for approval. If the user resubmits the expense sheet without making changes, the expense sheet will be automatically approved by the system (i.e., the approval process will not be restarted).

Edit an Expense Sheet

If a submitted expense sheet contains errors, you can modify the expense information rather than returning the expense sheet to the user to be corrected. To edit an expense sheet:

1. View the expense sheet details by clicking on the  next to the user's name on the **Historical Expenses** screen, or click on the user's underlined name.
2. Click the Edit button on the **Expense Sheet** screen. The expense sheet will open in entry mode, allowing you to make the necessary changes.
3. When you are finished, you can approve or save the expense sheet by clicking the appropriate button. Clicking will cancel the process without saving any of your changes.

When you modify a user's expense sheet, Web TimeSheet sends an e-mail to the user notifying them of the change.

Approve an Expense Sheet

As an administrator, you can approve submitted expense sheets from the **Historical Expenses** screen. This allows you to approve a single sheet or multiple expense sheets at one time. If you approve expense sheets from the **Historical Expenses** screen, the expense sheets will not be submitted to the appropriate supervisors, project leaders, or clients.

To approve expense sheets:

1. Click on the **Admin** button at the top of the screen and select **Historical Expenses** from the side menu.
2. Select the check box next to the expense sheets you want to approve. You can select more than one expense sheet, or select all expense sheets by clicking the **Select All** check box at the bottom of the screen.
3. Click the Approve button at the bottom of the list. Web TimeSheet will confirm that you want to approve the selected expense(s). If you are sure you want to approve the expenses, select Yes when prompted. If you do not want to approve the expenses, you can select No to cancel the approval and return to the **Historical Expenses** screen.

Reject an Expense Sheet

When you reject an expense sheet from the **Historical Expenses** screen, the expense sheet is sent back to the user to correct errors and resubmit the expense sheet. When the user resubmits the timesheet, it will restart the approval process.

To reject expense sheets:

1. Click on the **Admin** button at the top of the screen and select **Historical Expenses** from the side menu.
2. Select the check box next to the expense sheet you want to reject. You can select more than one expense sheet or select all expense sheets by clicking the Select All check box at the bottom of the screen.

Note ...

If you approve expense sheets from the **Historical Expenses** screen, the expense sheets will not be submitted to the appropriate supervisors, project leaders, or clients.

Expense features are available only if you have a valid license for the Expense module.

Note ...

Reversing the paid status is an “undo” function and does not reverse an actual payment disbursement.


Expense features are available only if you have a valid license for the Expense module.

3. Click the Reject button at the bottom of the expense sheet list. Web TimeSheet will confirm that you want to reject the selected expense sheet(s). If you are sure you want to reject the expense sheet(s), select Yes when prompted. If you do not want to reject the expense sheets, select No to cancel the rejection and return to the **Historical Expenses** screen.

Delete an Expense Sheet

You can delete a single expense sheet or multiple expense sheets at once. Deleting an expense sheet is irreversible.

To delete a single expense sheet:

1. Click on the **Admin** button at the top of the screen and select **Historical Expenses** from the side menu.
2. Click on the  next to the expense sheet you want to delete. Web TimeSheet will confirm that you want to delete the selected expense sheet. If you are sure you want to delete the expense sheet, select Yes when prompted. If you do not want to delete the expense sheet, you can select No to cancel the process and return to the **Historical Expenses** screen.

To delete multiple expense sheets:

1. Click on the **Admin** button at the top of the screen and select **Historical Expenses** from the side menu.
2. Select the check boxes next to the expense sheets you want to delete. If you want to delete all expense sheets, click in the **Select All** check box at the bottom of the list.
3. Click the Delete button at the bottom of the screen. Web TimeSheet will confirm that you want to delete the selected expense sheets. If you are sure you want to delete the expense sheets, select Yes when prompted. If you do not want to delete the expense sheets, you can select No to cancel the process and return to the **Historical Expenses** screen.

Marking Expense Sheets as “Paid” or “Not Paid”

You can mark expense sheets as “paid” to indicate that the expenses within that sheet have been processed and any necessary reimbursements have been paid. You can mark either individual expense sheets or multiple sheets at once. The paid status is at the expense sheet level; it does not apply to individual expense entries.

The paid status is displayed in the user’s expense sheet lists (Waiting for Approval, Approved, Rejected) and in appropriate Expense reports.

To mark expense sheets as paid:

1. Click on the **Admin** button at the top of the screen and select **Historical Expenses** from the side menu.
2. Select the check box next to each expense sheet that has been paid, or use the **Select All** check box at the bottom to select all sheets in the displayed list.
3. Click the Paid button to mark the selected expense sheets. Web TimeSheet will confirm you want to mark the expense sheets as paid. If you’re sure you want to mark them as paid, select Yes when prompted. If you are not sure, select No to cancel the action and return to the **Historical Expenses** screen.

To reverse the paid status, simply select the check box next to the appropriate expense sheet and click the Not Paid button.

Chapter 10 - System Security

Introduction

Permission profiles are used to define the activities and features users can access. Each permission profile has a name, description and list of actions. The administrator assigns permission profiles to each user when setting up the user profile.

Permission profiles allow you to restrict or expand a user's access to Web TimeSheet. Consider each profile carefully before assigning actions to that profile. Remember that each profile can be applied to any user.

Web TimeSheet provides the many predefined permission profiles. Each profile has its own set of actions available to the user. When you assign users certain profiles, the user can perform all actions associated with each profile.

The table at the right contains a description of the pre-defined permission profiles and the type of access allowed for each profile. You can create custom permission profiles to fit the needs of your organization, or edit the information for the existing profiles.

Accessing Permissions

To access the Permission Information screen, where you can add, edit, and/or delete permission profiles:

1. Click on the **Admin** button at the top of the screen and select **SETUP** to view a list of advanced setup options.
2. Select **Permissions**.

To add or edit permission profiles, refer to *Adding and Editing Permission Profiles* at the end of this chapter. To delete permission profiles, refer to *Deleting Permission Profiles*.

Understanding System Permissions

The System tab contains a list of actions that allow you to grant access to specific Web TimeSheet features and functions. The actions available to a user depend on the permissions assigned to the user (see above). Actions are divided into sections based on the Web TimeSheet menu with which they are associated.

The sections that follow describe the individual actions available on the System tab of the **Add/Edit Permission** screen.

| Profile | Description |
|---------------------------------|---|
| Administrator | Sets up and maintains all Web TimeSheet functions (full access). |
| Supervisor | View user timesheets/expenses, approve or reject timesheets/ expenses, and generate reports. |
| Project Leader - Limited Access | Setup and manage projects, approve timesheets/expenses and generate reports (for their own projects). |
| Project Leader - Full Access | Project Leader with full access to all projects (not just their own projects) |
| Client Representative | Generate reports, approve timesheet/ expense and view billing reports. |
| Timesheet | General permission with the ability to enter time on a timesheet. |
| All Reports | Can use reporting functions respective to permissions of the user. |
| Expenses | General permission with the ability to submit expenses. This permission is available only if your Web TimeSheet license includes the Expense module. |
| Payroll Manager | Access to time off, vacation management and related reports. |
| ProMax | Access to ProMax features including productivity and revenue information. This permission is available only if your Web TimeSheet license includes the ProMax module. |

Note ...

Refer to the table for a description of Web TimeSheet's pre-defined permissions and the type of access allowed for each permission

You can create custom permissions to fit the needs of your organization, or edit the information for the existing permissions.

The All Reports permission profile gives the user permission to view Web TimeSheet reports based on the user's other assigned profiles.

For example, if a user is a project leader, by default the user cannot access any specific reports. If you assign this user both the project leader and reports permission profiles, the user will be able to access any reports, except time off reports, that contain information pertaining to the user's projects.

Note ...

Expense actions are available only if you have a valid license for the Expense module.

Offline timesheet actions are available only if you have a valid license for the Offline TimeSheet module.

Administration Actions

The Administration actions allow a user to access the items within the Administration menu, as well as perform specific functions related to those items. The Administration actions are described below.

Set Up Timesheet Periods

Create and maintain timesheet periods (used to determine when users submit their timesheets for approval).

Send Broadcast Messages

Send e-mail messages from Web TimeSheet to specific departments, clients, or <All>.

Add/Edit Disclaimers

Create and maintain disclaimers that will be displayed on approval screens, timesheets, and expense sheets. This action is available for expenses only if your Web TimeSheet license includes the Expense module.

Mark Expenses as Paid

Mark expense sheets as "paid" from the **Historical Expenses** screen. Only entire expense sheets can be marked as "paid" (no individual expense entries). This action is available for expenses only if your Web TimeSheet license includes the Expense module.

Mark Expenses as Not Paid

Mark expense sheets as "not paid" from the **Historical Expenses** screen. Only entire expense sheets can be marked as "not paid" (no individual expense entries). This action is available for expenses only if your Web TimeSheet license includes the Expense module.

Modify Preferences

Modify the settings for all items listed under the **PREFERENCES** heading in the **Administration** menu.

Historical Timesheets

Submit, re-open, approve, reject, edit, and/or delete timesheets - as well as send offline timesheets to selected users - from the **Historical Timesheets** screen.

Historical Expenses

Submit, re-open, approve, reject, edit, and/or delete expense sheets from the **Historical Expenses** screen.

Approval Paths

View (list), edit, add, and/or delete approval paths.

Approver Types

View (list), edit, add, and/or delete approver types.

Currencies

View (list), edit, add, and/or delete currencies.

Departments

View (list), edit, add, and/or delete departments.

E-mail Notifications

View (list) and/or edit the Web TimeSheet e-mail notifications.

Employee Types

View (list), edit, add, and/or delete employee types.

Expense Codes

View (list), edit, add, and/or delete expense codes. This action is available only if your Web TimeSheet license includes the Expense module.

Holidays

View (list), edit, add, and/or delete holiday calendars.

Payment Methods

View (list), edit, add, and/or delete payment methods. This action is available only if your Web TimeSheet license includes the Expense module.

Permissions

View (list), edit, add, and/or delete permissions.

System License Info

View (list), edit, add, and/or delete system license keys and related license information.

Tax Codes

View (list), edit, add, and/or delete tax codes. This action is available only if your Web TimeSheet license includes the Expense module.

Time Off Codes

View (list), edit, add, and/or delete time off codes.

User Defined Fields

View (list), edit and/or delete user defined fields (custom fields).

User Groups

View (list), edit, add, and/or delete user groups.

Users

View (list), edit, add, and/or delete users (highest level permission for users).

(Users) Access Rights

View and/or edit users' access rights from within the user profile (requires View and/or Edit permission for Users).

(Users) Advanced Settings

View and/or edit advanced user information - related to human resources and payroll - from within the user profile (requires View and/or Edit permission for Users).

(Users) Approval Paths

View and/or edit the selected timesheet/expense approval paths from within the user profile.

(Users) E-mail Notifications

View and/or edit users' e-mail notifications from within the user profile (requires View and/or Edit permission for Users).

(Users) Hourly Cost

View and/or edit users' hourly cost rates from within the user profile (requires View and/or Edit permission for Users).

(Users) Login

View, edit, and/or add users' login name and password from within the user profile (requires View, Edit, and/or Add permission for Users). When the highest level Users action has Add permission, the Add permission for the (Users) Login action is also enabled (login is a requirement for adding new users).

(Users) Seat Assignments

View and/or edit users' seat assignments from within the user profile (requires View and/or Edit permission for Users). Seat assignments apply to add-on modules that use seat based license keys.

(Users) Time Off Settings

View and/or edit users' time off settings from within the user profile (requires View and/or Edit permission for Users).

(Users) User Group Settings

View and/or edit users' user group settings from within the user profile (requires View and/or Edit permission for Users).

Project Actions

The Project actions allow a user to access the items within the Projects menu, as well as perform specific functions related to those items. The Project actions are described below.

Client Representative

Can be assigned as a representative/approver for projects associated with the client. Client approvers can approve timesheets in which time is entered against the client's projects (client approver sees only the lines containing their projects).

Project Leader

Can be assigned as a project leader and can approve timesheets in which time is entered against the project leader's projects.

Add/Delete Project Notes

View, Add, and Delete project notes.

Clients

View (list), edit, add, and/or delete clients.

Roles

View (list), edit, add, and/or delete roles at the global level (role rates can be overridden at the project level).

All Projects

View and/or delete any project in the system (highest level permission for All Projects).

(All Projects) Assignments/Team

View and/or edit task-level assignments and the project team from within the **Project** screen - applies to All Projects in the system (requires View permission for All Projects).

(All Projects) Expenses

View and/or edit available expenses from within the **Project** screen - applies to All Projects in the system (requires View permission for All Projects). This action is available only if your Web TimeSheet license includes the Expense module.

(All Projects) Information

View and/or edit basic project information from within the **Project** screen - applies to All projects in the system (requires View permission for All Projects).

Note ...

User group actions are available only if you have a valid license for the User Grouping module.

Expense actions are available only if you have a valid license for the Expense module.

Note ...

Expense actions are available only if your Web TimeSheet license includes the Expense module.

(All Projects) Rates

View and/or edit billing rates from within the **Project** screen - applies to All Projects in the system (requires View and/or Edit permission for All Projects).

(All Projects) Roles

View and/or edit roles from within the **Project** screen - applies to All Projects in the system (requires View permission for All Projects).

(All Projects) Tasks

View and/or edit the tasks from within the **Project** screen - applies to All Projects in the system (requires View permission for All Projects).

Project Leader's Projects

View and/or delete projects for which user is the project leader (highest level permission for Projects).

(Project Leader's Projects) Assignments/Team

View and/or edit task-level assignments and the project team from within the **Project** screen - applies to projects for which user is the project leader (requires View permission for Projects).

(Project Leader's Projects) Expenses

View and/or edit available expenses from within the **Project** screen - applies to projects for which user is the project leader (requires View permission for Projects). This action is available only if your Web TimeSheet license includes the Expense module.

(Project Leader's Projects) Information

View and/or edit basic project information from within the **Project** screen - applies to projects for which user is the project leader (requires View permission for Projects).

(Project Leader's Projects) Rates

View and/or edit billing rates from within the **Project** screen - applies to projects for which user is the project leader (requires View permission for Projects).

(Project Leader's Projects) Roles

View and/or edit roles from within the **Project** screen - applies to projects for which user is the project leader (requires View permission for Projects).

(Project Leader's Projects) Tasks

View and/or edit the tasks from within the **Project** screen - applies to projects for which user is the project leader (requires View permission for Projects).

Timesheet Actions

The Timesheet actions allow a user to access the items within the Timesheet menu, as well as perform specific functions related to the timesheet. The Timesheet actions are described below.

Use Timesheet

Enter time against projects/tasks/time off using the Standard, In-Out, or both timesheet formats.

The Standard format requires entry of total hours worked against a project/task on any given date (duration).

The In-Out format requires entry of the start time and either the end time or total hours worked against a project/task on any given date.

Select Both formats allows the users to choose their own timesheet format in their preferences.

Enter Time Against Projects/Tasks

Add project/task rows to the timesheet and enter time against assigned projects/tasks.

Enter Time Against Time Off Codes

Add time off rows to the timesheet and enter time against assigned time off codes.

Unsubmit Timesheet

Use the Unsubmit button to retrieve a submitted timesheet before it has been approved.

View/Select Billing Options for Projects/Tasks

View the Billing column in the timesheet and select from the list of available billing options.

Allow Overlapping Time for In-Out Timesheet

Enter overlapping times when using the In-Out timesheet format.

Allow Copying from Previous Timesheets

Copy timesheet data from the last saved timesheet.

Show Task Progress in Timesheet

View project/task progress bars (includes hours completed, total estimated hours, and percentage complete) in the timesheet.

Allow Blank Timesheet Comments

Allow users to submit their timesheets without entering comments for each time cell. To make timesheet comments mandatory, make sure this check box is NOT selected.

Allow Blank Resubmission Comments

Allow users to resubmit their timesheets (after the timesheet has been unsubmitted, rejected, or re-opened) without entering a reason for the resubmission. To make resubmission comments mandatory, make sure this check box is NOT selected.

Timesheet Task Hours User Defined Field #1

Show User Defined Field 1 (timesheet task hours) in the timesheet.

Timesheet Task Hours User Defined Field #2

Show User Defined Field 2 (timesheet task hours) in the timesheet.

Timesheet Task Hours User Defined Field #3

Show User Defined Field 3 (timesheet task hours) in the timesheet.

Timesheet Task Hours User Defined Field #4

Show User Defined Field 4 (timesheet task hours) in the timesheet.

Timesheet Task Hours User Defined Field #5

Show User Defined Field 5 (timesheet task hours) in the timesheet.

Timesheet Task Row User Defined Field #1

Show User Defined Field 1 (timesheet task rows) in the timesheet.

Timesheet Task Row User Defined Field #2

Show User Defined Field 2 (timesheet task rows) in the timesheet.

Timesheet Task Row User Defined Field #3

Show User Defined Field 3 (timesheet task rows) in the timesheet.

Timesheet Task Row User Defined Field #4

Show User Defined Field 4 (timesheet task rows) in the timesheet.

Timesheet Task Row User Defined Field #5

Show User Defined Field 5 (timesheet task rows) in the timesheet.

Timesheet User Defined Field #1

Show User Defined Field 1 (entire timesheet) in the timesheet.

Timesheet User Defined Field #2

Show User Defined Field 2 (entire timesheet) in the timesheet.

Timesheet User Defined Field #3

Show User Defined Field 3 (entire timesheet) in the timesheet.

Timesheet User Defined Field #4

Show User Defined Field 4 (entire timesheet) in the timesheet.

Timesheet User Defined Field #5

Show User Defined Field 5 (entire timesheet) in the timesheet.

Holiday Calendar

View the list of statutory (civic) holidays from the Timesheet menu.

Allow Entry of Arbitrary E-mail Address for Offline TimeSheet

Request, save, and submit offline timesheet forms. This action is available only if your Web TimeSheet license includes the Offline Timesheet module.

Use the Stopwatch

Use the Stopwatch feature to track precise time spent working on projects/tasks.

Expense Actions

The Expense actions allow a user to access the items within the Expenses menu, as well as perform specific functions related to expenses. Expense actions are available only if your Web TimeSheet license includes the Expense module. The Expense actions are described below.

Enter Expenses

Enter expenses incurred for tasks/purchases - options include Project Specific, Not Project Specific, and Both.

The Project Specific option allows users to enter expenses associated with a specific project.

The Not Project Specific option allows users to enter expenses that are not associated with a specific project.

The Both option allows users to enter any expenses (both project and not project specific).

Note ...

Offline timesheet actions are available only if you have a valid license for the Offline Timesheet module.

Expense actions are available only if you have a valid license for the Expense module.

Note ...

Expense actions are available only if you have a valid license for the Expense module.

Override Exchange Rates

Override the default exchange rates for expenses in currencies other than base currency.

Override Amount for Rated Expenses

Override the calculated amount for expenses based on a rate (e.g., mileage).

Unsubmit Expense Sheet

Use the Unsubmit button to retrieve a submitted expense sheet before it has been approved.

Approval Actions

The Approval actions allow a user to access the items within the Approvals menu, as well as perform specific functions related to approvals. A user must have permission to approve timesheet tasks, time off, or expenses to be included in timesheet or expense approval paths. The Approval actions are described below.

Supervisor

Can be assigned as supervisor to individual users, and approve timesheets and expense sheets - sheet level approvals - for those users to whom this supervisor is assigned. A user must have supervisor permissions to be assigned as a supervisor to individual users and to be included in those users' approval paths (where the approver type is "supervisor").

Expense sheet approvals apply only if your Web TimeSheet license includes the Expense module.

Show Task Progress in Timesheets Awaiting Approval

View project/task progress bars (includes hours completed, total estimated hours, and percentage complete) in the timesheets submitted for approval.

Allow Blank Rejection Comments

Allow approvers to reject users' timesheets without entering a reason for the rejection. To make rejection comments mandatory, make sure this check box is NOT selected.

(Timesheet) Task Information

Approve, edit, and/or view all task information for timesheets submitted to this approver. View All allows the approver to view all tasks, regardless of whether the tasks are associated with the approver's projects.

Granting a user this permission will allow that user to be included when setting up approver types and approval paths. The user must have approval permissions AND be included in an approver type (that is associated with an approval path) in order to approve timesheets. To be included in an approver type, the approver type must name the user's approval role (project leader, client representative, supervisor) or the user's individual name (e.g., John Smith).

(Timesheet) Time Off

Approve, edit, and/or view all time off information for timesheets submitted to this approver.

Granting a user this permission will allow that user to be included when setting up approver types and approval paths. The user must have approval permissions AND be included in an approver type (that is associated with an approval path) in order to approve timesheets. To be included in an approver type, the approver type must name the user's approval role (project leader, client representative, supervisor) or the user's individual name (e.g., John Smith).

Expenses

Approve, edit, and/or view all expenses for expense sheets submitted to this approver. View All allows the approver to view all expenses, regardless of whether the expenses apply to the approver's projects.

Granting a user this permission will allow that user to be included when setting up approver types and approval paths. The user must have approval permissions AND be included in an approver type (that is associated with an approval path) in order to approve expense sheets. To be included in an approver type, the approver type must name the user's approval role (project leader, client representative, supervisor) or the user's individual name (e.g., John Smith).

Expense sheet approvals apply only if you have a valid license key for the Expense module.

Config Actions

The Config actions allow a user to access the items within the Configuration menu, as well as perform specific functions related to those items. The Configuration actions are described below.

Preferences

Access and change the settings that affect Web TimeSheet's look and feel (**Preferences** screen).

Change Internal E-mail Address

Change the user's internal e-mail address (the address that receives Web TimeSheet e-mail notifications). Any changes will be recorded in the user's profile as well as on the Change E-mail Address screen.

Change External E-mail Address

Change the user's external e-mail address (the address outside your organization that may be used as a secondary e-mail address when the user cannot access his/her internal address). The external e-mail is used when requesting offline timesheets. This action is available only if you have a valid license for the Offline TimeSheet module.

Change Password

Change your (the user's) login password (any change will be recorded in the user profile as well as on the Change Password screen).

Substitute User

Add, edit, and delete substitute users to enter timesheet/expense data, approve timesheets/expense sheets, and/or receive submission and/or approval e-mail notifications on the user's behalf.

Integration Actions

The Integration actions allow a user to access the items within the Integration menu, and perform specific functions related to those items. The Integration actions are described below.

Override Permissions to Allow Importing of All Data in Web TimeSheet

Override the user's existing permissions for the purpose of exporting data from Web TimeSheet to an external application via the integration manager (e.g., Microsoft Project). For example, if the user has the ability to edit only his own projects in Web TimeSheet, enabling this action will allow the user to export data for all projects in the system via the integration manager.

Override Permissions to Allow Importing of All Data in Web TimeSheet

Override the user's existing permissions for the purpose of importing data into Web TimeSheet from an external application via the integration manager (e.g., Microsoft Project).

This means that if a user has the ability to edit only his own projects in Web TimeSheet, granting the user this action will allow him to update any projects in the system via the integration manager.

Can Authorize Integration Applications

Enable/disable the connection from an external (installed outside the Web TimeSheet server) integration manager to Web TimeSheet. To perform updates via the external integration managers, the connection must be enabled. Refer to Chapter 12 - Integration for further information about enabling the connection.

WTS Integration Manager for QuickBooks (XML)

Perform data updates between Intuit QuickBooks and Web TimeSheet using the Web TimeSheet Integration Manager for QuickBooks (XML).

Understanding Report Permissions

The Reports tab on the **Add/Edit Permission** screen allows you to grant access to specific report functions and to enable/disable specific reports based on the user's permissions. Specific report functions are listed under "Reporting Actions" on the Reports tab, and are described below.

Reporting Functions

Access the **Reports** menu and perform basic reporting functions (filter data, generate reports, export data, etc.).

Add Public Report

Customize an existing report and save the customization as a report that everyone can access (by default, anyone who can access the existing report can access the customized report).

Delete Public Report

Delete a customized public report.

Note ...

Not all of the report access levels are available for every report. Each access level is available where it is logical for the individual report (e.g., the Client Rep access level is not provided for time off reports because it does not make sense to make time off information available for client representatives.)

The ProMax section is available only if you have a valid license for the ProMax module.

Note ...

The ProMax tab is available on the **Add/Edit Permission** screen only if you have a valid license for the ProMax module.

A permission can be deleted only if no users are assigned to the permission (user profile). If a user is assigned to a permission, you can disable the permission using the Edit function.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Add/Delete Private Report

Customize an existing report and save the customization as a report that only the user can access.

Edit Report Settings

Access the Report Settings screen and change the displayed fields and grouping options (ensures that sensitive data cannot be seen by those who do not have this permission - you can make only certain reports available, such as customized public reports, and then disable this permission for heightened security).

The Reports tab includes a list of all reports available in Web TimeSheet (both pre-defined and custom reports). For each report, you can control how data will be filtered by selecting an access level, as follows:

| Access Level | Description |
|----------------|--|
| All | Users with this access level can see all information system-wide (good for administrators). |
| Client Rep | Users with this access level can see all information for the client they represent. |
| Project Leader | Users with this access level can see all information pertaining to either their own projects or all projects (depending on their Project actions). |
| Supervisor | Users with this access level can see all information pertaining to the users who report to them. |
| User | Users with this access level can see their own information, but no one else's. |

Refer to *Chapter 8 - Reports* for a description of the reports listed on the Reports tab of the **Edit Permission** screen.

Understanding ProMax Actions

The ProMax tab is used to specify which ProMax features can be accessed. The ProMax tab is available only if your Web TimeSheet license key includes access to the ProMax product. The ProMax actions are described below.

Setup Actions

View All ProMax Objects

View (list) ProMax objects.

Edit All ProMax Objects

Edit the settings for ProMax objects.

View User Productivity

View (list) user productivity information from the User Productivity screen.

Edit User Productivity

Edit user productivity information from the User Productivity screen.

ProMax Preferences

View (list) and edit the preferences for ProMax look and feel.

Administration Actions

Timesheet Status

View the ProMax Timesheet Status screen (includes a status summary and lists of missing timesheet submissions and approvals).

Repeat Offenders

View a list a users who are repeatedly late submitting timesheets and/or approvals.

User Vacation

View the User Vacation table (includes users' allowed days, the "as of" date, and number of days remaining).

Time Off By Types

View time off information for the entire company, by time off code.

Hours Summary

View information about total billable, non-billable, and time off hours recorded by all users in a department or company.

Company Actions

Productivity

View summarized productivity information for the entire company.

Project

View information about the status of projects.

Client

View lists of clients by revenue and profit.

Group Actions

Department

View productivity information by department.

Project

View productivity information by project.

User Actions

Productivity

View productivity information by user.

Adding and Editing Permission Profiles

Adding new permission profiles will allow you to assign users access to various features of Web TimeSheet that are not covered by the predefined profiles. For example, you may want to create a permission profile for Branch Managers that includes actions from more than one predefined profile.


To add a new permission profile:

1. Click on the **Admin** button and select **SETUP** for a list of advanced setup options.
2. Select **Permissions**. On the **Permission Information** screen, click the Add button and enter the name of the new permission profile. The description is optional.
3. Now select the System tab and specify which actions you want to assign to the profile. You can expand the list of actions by selecting the + next to each action type, or expand all actions by clicking on Expand All in the upper right corner. To hide the expanded list, select the - or click on Collapse All in the upper right corner.

If you assign Report actions to the new profile, you may want to review the list of reports (Reports tab) and remove any individual reports you do not want associated with the permission profile. If the profile allows access to a specific report, any user assigned the profile will be able to access the report.


To assign ProMax actions to the new profile, click on the ProMax tab. The ProMax tab is available only if your Web TimeSheet license includes the ProMax module.

5. When you are finished, click the Add button at the bottom of the screen.

You may want to change permission profiles you have added or edit some of the predefined profiles to fit the needs of your organization. To edit a permission profile, click the  next to the appropriate profile or click on the underlined name. Modify the permission information and click the Save button when you are finished.

Deleting Permission Profiles

You can delete a single permission profile or multiple profiles at a time. To delete a single permission profile:

1. Click the  next to the appropriate profile on the **Permission Information** screen.
2. Web TimeSheet will confirm that you want to delete a permission profile before removing it from the database. If you are sure you want to delete the profile, select Yes when prompted. If you do not want to delete the profile, select No to cancel the deletion and return to the **Permissions** screen.

To delete multiple permission profiles:

1. Select the check boxes next to the permission profiles you wish to delete on the **Permission Information** screen. If you want to delete all profiles, select the check box labeled **Select All** (at the bottom of the list).
2. Click the Delete button to delete the selected permission profiles. Web TimeSheet will confirm that you want to delete the profiles before removing them from the database. If you are sure you want to delete the profiles, select Yes when prompted. If you clicked the Delete button in error, you can select No to cancel the deletion and return to the **Permissions Information** screen.

Note ...

A permission profile can be deleted only if no users are assigned to the profile (user profile). If a user is assigned to a profile, you can disable the profile using the Edit function.

Chapter 11 - System Configuration

Note ...

With Windows NT authentication, a user is allowed only three attempts to log into the system.

If a user exceeds these three attempts, the administrator will need to either remove the NT authentication from the user's profile in Web Timesheet, or unlock the user's account in Windows NT.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Introduction

The system configuration settings determine how Web TimeSheet functions on a day-to-day basis. These settings include the following:

- system preferences that specify how certain features will be handled across the application
- approval preferences that define the approval process to be used system wide
- expense column settings that specify which fields will be available on expense sheets
- due dates and end dates for timesheet/expense submission and approvals
- global user preferences that determine Web TimeSheet's look and feel (for new users)

System Preferences

The **System Preferences** screen is used to set your general system parameters, e-mail server configuration, and DCAA compliance.

Setting General System Preferences

To set general system preferences:

1. Click on the **Admin** button and select **PREFERENCES** to display a list of options.
2. Select **System Preferences**. Set your system preferences to best fit the needs of your organization, taking note of the following:

Allow login screen to remember passwords

Allowing the login screen to remember passwords can be a security risk and is not recommended for busy sites where one PC may have multiple users or many people have access to your system.

Enable Windows NT login verification

Enabling NT login allows you to use Windows NT passwords for Web TimeSheet, thus eliminating the need for users to have a separate Web TimeSheet password. When you enable Windows NT authentication, you will be required to enter the appropriate domain name in each user's Web TimeSheet profile.

With Windows NT authentication, a user is allowed only three attempts to log into the system. If a user exceeds these three attempts, the administrator will need to unlock the user's account in Windows NT.

URL to go to after logout

You may want users' browsers to take them to a specific Web address after logging out of Web TimeSheet (e.g., your organization's Intranet site). If you do not enter an address in this field, logging out will take the user to the Web TimeSheet login page

URL of Web TimeSheet

This is your organization's URL to Web TimeSheet (location where Web TimeSheet is accessed).

Login name formula

Entering a login name formula will allow Web TimeSheet to automatically create a standard login name for all new users (more information).

Internal e-mail formula

Entering an internal e-mail formula will allow Web TimeSheet to automatically generate standard e-mail addresses for all new users.

Default hours per day

Defining the system wide default hours per day will automatically apply this value to all users' profiles. If some users do not work the same number of hours, you can simply edit just those users' profiles.

Time off accrual format

This is the format in which all time off information will be calculated (days or hours). By default, time off is calculated in days.

Allow more than 24 hours per day in Timesheet

You may wish to enable this option to allow for irregular timesheet periods. For example, during the winter holidays many organizations process timesheets early to avoid delays due to absences from holidays and vacation. This option would allow you to process the timesheets early by having users enter additional time to account for the days within the period that fall after the processing date (which may result in some days having more than 24 hours).

User list style

The user list style determines how users are listed for Web TimeSheet filters. Listing users in a drop-down list can be useful for organizations with a small number of users, whereas a screen is more effective for listing a large number of users.

Send overdue notifications daily

Use this option to send overdue notifications every day until the required action (submit timesheets, approve timesheets, approve expense sheets) is completed.

Auto-generate reports

You may wish to automatically generate reports (before setting filter and grouping options). This option is useful if reports have been pre-configured and will not require regular changes, as it avoids the need to click every time a report is run. Auto-generating reports is not recommended if your reports require frequent maintenance.

Use billing information

If your organization completes billable work, you may want to enable billing features across Web TimeSheet. Using billing information will allow you to apply various billing rates to projects and run reports that will provide you with the data you need to bill clients for the time spent working on the projects. If your organization does not complete billable work (or is not using Web TimeSheet for billing purposes), you can hide billing information by deselecting the check box.

Note that when you deselect this check box, the project/task billing status, billing rates, and billable hours will remain intact, meaning that this information will be hidden, but the values themselves will not be changed. For

example, if the billing status for Project A is "Billable", hiding the billing information will not change the "Billable" status of the project. Therefore, any hours entered against this project will show up as "Billable" in the reports. You may want to change the status of all projects to "Non-Billable" and change the values of all billing rates to "0.00" before hiding any billing information.

Send anonymous usage statistics to Replicon Inc.

Providing usage statistics to Replicon Inc. allows you to play a vital role in improving the quality, reliability, and performance of the Web TimeSheet application. If you choose to enable this option, Replicon Inc. will collect anonymous information about your hardware configuration and how you use our software to identify trends and usage patterns. Replicon will not collect your name, address, or any other identifying information about your organization - the process is safe, secure, transparent, and completely anonymous.

Roll up project/task estimates from sub-tasks

Rolling up estimates from sub-tasks means that, at each level in a project hierarchy, the estimated hours/cost for the parent task will be calculated automatically as a sum of the estimates for the sub-tasks. The values are available in project reports and, in the case of estimated hours, on the project structure screen. This option is recommended if you organize projects in such a way that only the lowest level tasks are available for users to enter time in their timesheets.

If you choose to roll up estimates, it is recommended that parent tasks/projects do not allow time entry (time entry should be allowed only at the lowest level).

When this option is not enabled, estimated hours and cost can be manually entered at any level of the hierarchy, meaning that no automatic calculations will occur.

Split project/task into two columns on timesheet

Enable this option if your organization prefers that projects and tasks are displayed in separate columns on the timesheet (by default they are displayed in a single "Task" column). If you split the project and task columns, you will also have the option to add a third column for client (see next).

Note ...

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Note ...

POP3 fields are available only if you have a valid license for the Offline TimeSheet module.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Add a column for client on timesheet

If you have chosen to split the project and task columns (see previous), you may also add a third column to the timesheet that will identify the client associated with the project/task. The client column is always the first column displayed, followed by project, then task (with appropriate dependencies).

3. When you are finished, click the Save button to apply your changes.

Setting E-mail Preferences

To set e-mail preferences:

1. Click on the **Admin** button at the top of the screen and select **PREFERENCES** from the side menu to view a list of options.
2. Click on **System Preferences** and select the E-mail Settings tab to customize your e-mail settings.

3. Enter your account information:

Web TimeSheet e-mail address

Enter the e-mail address for the Web TimeSheet e-mail account (e.g., webtimesheet@yourcompany.com).

Username (POP3)

This is the username for the Web TimeSheet e-mail account that will be used to retrieve external data.

Password (POP3)

This is the password for the Web TimeSheet e-mail account.

4. Now enter your mail server information:

Incoming (POP3)

Enter the address and port number of the incoming e-mail server (used to retrieve external data such as Offline TimeSheet data).

Outgoing (SMTP)

Enter the address and port number of the outgoing e-mail server (used to send e-mail notifications to your users).

5. Last, enter the time to retry after sending e-mail failed (hours) - this field determines how often the system should retry to send e-mails after send failures occur.

6. When you are finished, click the Save button to apply your changes.

DCAA Compliance

DCAA compliance ensures that Web TimeSheet meets the requirements of the Defense Contract Audit Agency (DCAA) for automated timekeeping systems. It also provides additional controls that will allow your organization to enforce business policies associated with DCAA, such as daily timesheet entry and notifying employees when they have new jobs.

To set DCAA compliance options:

1. Click on the **Admin** button at the top of the screen and select **PREFERENCES** from the side menu to view a list of options.
2. Click on **System Preferences** and select the **DCAA Compliance** tab to customize your DCAA settings:

Enable DCAA Compliance

Enabling DCAA compliance ensures that Web TimeSheet adheres to DCAA regulations for automated time keeping systems. All DCAA settings can be customized to meet the specific needs of your organization. If you change any of the settings, this option will appear as a gray check box. You can check your current settings at a glance - the screen always shows both the default DCAA settings and the current system settings so you can determine if any changes have been made. The table that follows provides a more detailed explanation of the DCAA settings.

Require comments for timesheet changes

This setting is automatically turned on when you enable DCAA compliance, which ensures that all changes made to a user's timesheet are documented. Change comments are required for all changes made to the timesheet after submission, as well as for any changes made by a substitute user before submission.

If you turn off this setting, Web TimeSheet will still prompt for change comments; however, the comments will not be required.

3. When you are finished, click the Save button to apply your changes.

DCAA Settings

The following settings are associated with DCAA compliance:

- *Require comments for timesheet changes*
DCAA Setting: On

This setting, located in the DCAA Compliance section of the **System Preferences** screen, ensures that all changes made to a user's timesheet are documented. Change comments are required for all changes made to the timesheet after submission, as well as for any changes made by a substitute user before submission.

If you turn off this setting, Web TimeSheet will still prompt for change comments; however, the comments will not be required.
- *Task Assignments Modified e-mail notification*
DCAA Setting: Enabled

This e-mail notification ensures that users are made aware of their task assignments - both new and removed assignments. When DCAA compliance is enabled, the notification is automatically turned on at the global level, as well as for all users in the system.

The template for this e-mail notification is fully customizable.
- *Daily Reminder - Fill in Timesheet e-mail notification*
DCAA Setting: Enabled

This e-mail notification is sent daily to remind users to fill in their timesheets. When DCAA compliance is enabled, the notification is automatically turned on at the global level, as well as for all users in the system.

The template for this e-mail notification is fully customizable.
- *Timesheet Modified e-mail notification*
DCAA Setting: Enabled

This e-mail notification ensures that users are always aware of any changes made to their timesheets. When DCAA compliance is enabled, the notification is automatically turned on at the global level, as well as for all users in the system.

The template for this e-mail notification is fully customizable.

- *Allow blank resubmission comments*
DCAA Setting: Off

This setting, located in the Timesheet actions on the Edit Permission screen, ensures that any time a user resubmits a timesheet (e.g., after a rejection or unsubmit), the user specifies a reason for the resubmission.

If you want to allow blank resubmission comments, you will need to edit each permission profile manually.
- *Allow blank rejection comments*
DCAA Setting: Off

This setting, located in the Approvals actions on the Edit Permission screen, ensures approvers document reasons for rejecting users' timesheets.

If you want to allow blank rejection comments, you will need to edit each permission profile manually.
- *Timesheet Audit Trail report*
DCAA Setting: On

The Timesheet Audit Trail report provides a complete history of all actions performed on a timesheet after submission. When DCAA compliance is enabled, this report is made available (with <All> access level) in all permission profiles that allow access to both administrative tasks and reports.

Note ...

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense features are available only if you have a valid license for the Expense module.

Expense Columns

The **Expense Columns** screen allows you to specify which fields are valid for expense sheets entered by users within your organization. Any field selected on this screen will be enabled in the expense sheet settings, and will be available to the user. You may want to disable any fields that are not used by your organization to prevent confusion.

To customize the expense columns:

1. Click on the **Admin** button and select **PREFERENCES** to display a list of options.

Note ...

On the **User Preferences** screen, you must select more than one option in the *Timesheet Name Display* section, unless you select Full Path Name or Full Path Code. For example, you might choose to display the project code and task name.

Clicking the Cancel button at the bottom of any screen will cancel the process without saving your changes.

Expense features are available only if you have a valid license for the Expense module.

2. Select **Expense Columns**. To set up the proper expense columns for your organization, select the check boxes next to the columns you want to display in the expense sheets. Note that the Quantity and Rate options refer to all rate-based expenses (such as mileage).
3. When you are finished, click the Save button to apply your changes.

Due/End Dates

Due dates determine when timesheets must be submitted for approval and when timesheet/expense approvals must be completed.

End dates determine the last date when time can be entered for each type of period (system, employee type, department). To set due and end dates:

1. Click on the **Admin** button and select **PREFERENCES** to display a list of options.
2. Select **Due/End Dates**. Set the appropriate dates for timesheet/expense entry, submission, and approval.
3. When you are finished, click the Save button to apply your changes.

User Preferences

User Preferences define the system-side, default display settings for Web TimeSheet users. If you change the user preferences, the changes will affect only those users created after the changes are made. Existing users can change their own preferences from the **Configuration** menu (see *Chapter 7-User Configuration*).

To customize user preferences:

1. Click on the **Admin** button and select **PREFERENCES** to display a list of options.
2. Select **User Preferences**. Define the default display settings for new users.
3. When you are finished, click the Save button at the bottom of the screen.

Chapter 12 - Integration

Introduction

The Web TimeSheet Integration module provides a central location from which users can access integration features purchased by your organization, including Web TimeSheet.

The Integration module includes both external (accessed outside of Web TimeSheet) and internal (accessed from within Web TimeSheet) integration features.

External Integration Managers

External integration managers are installed on a local machine or server and are accessed from another application (not from within Web TimeSheet); however, to save time, these integration managers can be installed on the Web TimeSheet server. When an external integration manager is installed on the Web TimeSheet server, a link appears in the **Integration** menu. By clicking on the link, individual users can download and install the manager themselves. For an individual user to download and install the integration manager, the user must have permission to access both the **Integration** menu and the individual integration manager. The user must also have administrative permission on their local machine to install applications.

Current external integration managers include the Integration Manager for Microsoft Project Standard/Professional and Microsoft Project Server.

Internal Integration Managers

Internal integration managers are installed on the Web TimeSheet server and are accessed from within the Web TimeSheet **Integration** or **Reports** menu. When an internal integration manager is installed, a link is provided in the **Integration** or **Reports** menu for individual users to set up and run the necessary export.


Current internal integration managers include the Integration Manager for QuickBooks (XML), QuickBooks (IIF), Peachtree, and ACCPAC.

Setting Up the Integration Manager

External integration managers connect Web TimeSheet to another application. To successfully integrate through an external integration manager, the integration manager must be allowed to connect to the Web TimeSheet server.

To enable the connection from the integration manager to Web TimeSheet, the integration manager must be installed on a local machine or server, and must attempt to connect to Web TimeSheet. Once the integration manager has attempted a connection, it will prompt you to authorize the connection (from within the Integration Manager itself - not from within Web TimeSheet). Click the Yes button to authorize the connection.

If you ever need to disable a previously enabled (authorized) connection, follow the steps below:

1. Click on the **Integration** button at the top of the Web TimeSheet screen.
5. Select **Integration Setup** from the side menu. You will notice that the integration manager is included in the list with a status of "Enabled".
6. Click on the  next to the integration manager, or click on the underlined name.
7. On the **Status** screen, select "Disabled" and click the Save button. Once the status has been saved, all users who run the external integration manager will be prevented from connecting to Web TimeSheet (and thus prevented from performing updates via the integration manager).

Note ...

A user must have a seat assignment (Microsoft Project integration), appropriate permission (QuickBooks XML integration), or access to the Administration menu to use the features available in the Integration menu.

Installing an External Integration Manager

To install an external integration manager (e.g., Web TimeSheet Integration Manager for Microsoft Project Standard/ Professional) on the Web TimeSheet server (which will provide users access to install the integration manager on their own local machines), refer to the appropriate integration manager user manual.

The instructions that follow are for installing an external integration manager locally by downloading the installation file from the Integration menu in Web TimeSheet.

1. Click on the **Integration** button at the top of the screen.
2. In the side menu, select the name of the external integration manager you want to install and follow the instructions provided.
3. Once you have launched the installation file, the installation wizard will guide you through the rest of the installation. When you are finished, you will be able to access the external integration manager from your local machine (for further instructions on accessing the integration manager, refer to the appropriate integration manager user manual).