Offline Expense Sheet
User Guide

Version 6.1

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Introduction

The Offline Expense Sheet module for Web TimeSheet allows users to modify and submit expense sheets without directly accessing the Web TimeSheet server. Expense sheets are e-mailed to the user at a specified e-mail address, allowing the user to enter expense information without connecting to the Internet. The diagram below illustrates the flow of information between Web TimeSheet and Offline Expense Sheet.

Before you can use the Offline Expense Sheet module you must complete the following:

- Install and activate Web TimeSheet and the Expense module
- Enter a valid Web TimeSheet license key for Offline Expense Sheet
- Set up Web TimeSheet to access your e-mail server.

The diagram to the right illustrates the Offline Expense Sheet process flow.

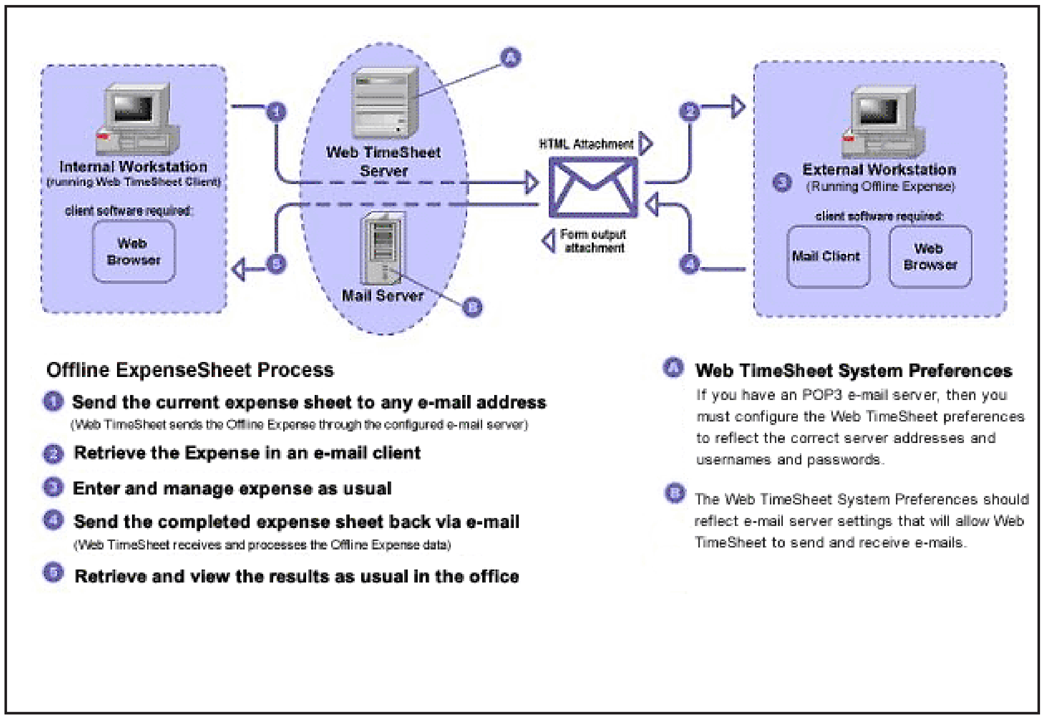
Technical Requirements

The following items are required to successfully use the Web TimeSheet Offline Expense Sheet:

- Web TimeSheet (installed on Windows NT/2000/XP/2003)
- A POP3 e-mail server
- A POP3 e-mail account for Web TimeSheet to access incoming e-mails.

Constraints

- Client machines must have a local e-mail client installed
- Local e-mail clients must be configured to allow the sending and receiving of attachments
- Netscape and Firefox browsers do not display the offline expense sheet buttons correctly.



Technology

The Web TimeSheet Offline Expense Sheet module uses e-mail to send HTML forms to users. Offline expense sheet forms are sent as e-mail attachments that can be accessed locally using an Internet browser.

When the user sends the data back to Web TimeSheet, an e-mail is generated and stored in the user's local e-mail outbox. The e-mail remains in the outbox queue until the user is again connected to the Internet, when it is sent to the Web TimeSheet e-mail server.

The Web TimeSheet server connects to the e-mail server at scheduled intervals to retrieve any offline expense sheets that have been sent. The e-mails are then parsed by Web TimeSheet and either saved or submitted (depending on the user's specifications), as if the user had logged into the system directly.

Web TimeSheet sends the user a notification when the expense sheet has been successfully saved/submitted. If errors occur during the save/submit, Web TimeSheet sends the user a notification reporting the error. The user can then resolve the error and re-send the offline expense sheet to Web TimeSheet.

Setting Up E-mail Information

Before you can begin using the Offline Expense Sheet module, you must first set up Web TimeSheet to access your e-mail server. You can configure Web TimeSheet to accomodate either a POP3/SMTP or a Microsoft Exchange Server (MAPI) e-mail server.

To configure Web TimeSheet to use a POP3 server :

1. Log into Web TimeSheet as administrator
2. Click the **Admin** button at the top of the screen and select **PREFERENCES** from the side menu
3. Select **System Preferences** and click the **E-mail Settings** tab
4. Select **POP3/SMTP** as the Mail server type from the **E-mail Server Information** drop down menu
5. Enter your **Account Information** as follows:

   Web TimeSheet e-mail address
   Enter the e-mail address for the Web TimeSheet e-mail account (e.g., webtimesheet@yourcompany.com) that will receive Offline Expense Sheet data.

   Username (POP3)
   Enter the username for the Web TimeSheet e-mail account that will be used to retrieve the Offline Expense Sheet.

   Password (POP3)
   Enter the password for the Web TimeSheet e-mail account.

6. Enter your mail server information:

   Incoming (POP3)
   Enter the address and port number of the incoming e-mail server (used to retrieve Offline Expense Sheet data).

   Outgoing (SMTP)
   Enter the address and port number of the outgoing e-mail server (used to send the Offline Expense Sheets to your users via e-mail).

7. Specify how often (in hours) the systems retries to send e-mails after send failures.
8. When you are finished, click the **Save** button.

Seat Assignments and Permissions

To allow users access to the Offline Expense Sheet module, make sure you grant each user a seat assignment for the Offline Expense Sheet module, as well as the necessary permissions.

For further information on how to grant seat assignments and assign permissions, refer to the *Web TimeSheet User Guide*.

Chapter 3 - Using the Offline Expense Sheet

Note ...

The Offline button is available on the expense sheet screen only if you have a seat assignment and appropriate permissions.

Refer to the *Web TimeSheet User Guide* for further information about seat assignments and permissions.

Introduction

If you are going to be without an connection to Web TimeSheet for an extended period, you can use the Offline Expense Sheet module to keep track of your hours. The offline expense sheet is an HTML form that you can set up in Web TimeSheet and then e-mail to a computer which may not have permanent Internet access.

When you have e-mailed your expense sheet, you can go offline and use the HTML form to record your expenses. The offline expense sheet allows you to save the data locally as a file, or save and submit the data by storing the information in your
e-mail outbox until you are again connected to the Internet.

Requesting an Offline Expense Sheet

Before requesting an Offline Expense Sheet form, make sure you are connected to the Web TimeSheet server.

To request an Offline Expense Sheet:

1. Log into Web TimeSheet and click the **Expense** button at the top of the screen.
2. Click the **Offline** button. The Offline Expense window will open.
3. Select the e-mail address to which you would like the offline expense sheet form sent. You can choose from your internal e-mail address, external e-mail address, or (if your permissions allow) you can enter another e-mail address in the field provided. Remember, the e-mail account you choose must be accessible from your offline machine (when connected to the Internet).
4. Click the **Send** button. An offline expense sheet form will be sent to the e-mail address you specified. This form will be blank (it will not have any expenses attached) but will contain a list of assigned clients and projects.

Click the **Cancel** button if you want to cancel the action without saving any changes.

Tip: Before you go offline, you should check your e-mail account to ensure the offline expense sheet form was received.

Accessing the Offline Expense Sheet

To access the offline expense sheet form:

1. On your offline machine, open the e-mail account to which the offline expense sheet form was sent and locate the e-mail sent from Web TimeSheet.
2. Open the e-mail. The offline expense sheet form will be included in the e-mail as an HTML attachment.
3. To open the offline expense sheet form, click on the attachment. The HTML form will open in your browser.

Tip: The offline expense sheet process works best if you save the attached blank form as a local file. You can then enter your expense information in the blank form and save it with a new name for submitting to Web TimeSheet.

Entering Data in the Offline Expense Sheet

When you have accessed the offline expense sheet form, you can enter your expense data.

To enter your expense data, click in the appropriate field and type in your expense information. Remember to complete all the necessary columns, including any user defined columns.

To add a project, click the **Add Project** button, enter the project and expense information, and click the **Save** button

Duplicating and Deleting Rows

If you need to duplicate a row in your expense sheet, click the **[+] INS** link next to the row you want to duplicate. A new row will be created below that project.

To delete a row, click the **[-] DEL** link next to the row you want to delete.

Saving and Submitting the Offline Expense Sheet

When you are finished filling out your expense sheet, you may choose to:

- save the expense sheet data as a local file on your system
- save the expense sheet data in an e-mail, to be sent to Web TimeSheet when you next reconnect to the internet.

To save the expense sheet locally :

1. Click the **Save Offline** button.
   You will be prompted to assign a file name and to specify a local folder location where you want to save the file. You can re-open this file for editing by clicking the **Open Saved Expense Sheet** button and selecting the file from the dialog box. You can also send the file directly to Web TimeSheet as an e-mail attachment.
2. When you are done, click the **Save** button.

To save the expense sheet data in an e-mail :

1. Click the **Send to Web TimeSheet** button.
   You will be promted to enter your Web TimeSheet username and password.
2. When you are done, click the **Save** button to save the data in Web TimeSheet, or click **Submit** to submit the expense sheet for approval. An e-mail will be automatically generated and saved in your Outbox until you next reconnect to the internet.

Web TimeSheet will send you an e-mail when your offline expense sheet data has been uploaded successfully. If errors in your expense sheet prevent Web TimeSheet from successfully saving/submitting the data, you will receive an e-mail explaining the error. If there is an error, you must fix the error and re-send the expense sheet.