

# DOVICO Timesheet™ v10

## EXERCISE BOOK

---

# EXERCISE BOOK

## DOVICO Timesheet

Introducing **DOVICO Timesheet**, the industry standard in enterprise-wide solutions for time and project management from DOVICO Software.

DOVICO Timesheet is a full-featured software package designed specifically for time and cost reporting. It's ideally suited for corporations and professionals who desire to monitor project time and costs and improve productivity. This web-based solution monitors timesheets, invoices and expenses for employees, teams and departments. Through better time and project management, DOVICO Timesheet helps corporations reduce costs and deliver projects on time.

Managers using DOVICO Timesheet have access to over 135 customizable time and cost reports & graphs by individual, team, project, task and more. Every report or graph can be exported or sent by e-mail in many different formats.

### TABLE OF CONTENTS

<b>WHAT IS DOVICO TIMESHEET?</b> .....	<b>2</b>
<b>DOVICO TIMESHEET SETUP</b> .....	<b>4</b>
<b>TIME AND EXPENSE ENTRY</b> .....	<b>15</b>
<b>CUSTOM REPORTS, DATA MINING &amp; LINKING</b> .....	<b>22</b>
<b>TECHNICAL SUPPORT</b> .....	<b>23</b>
<b>MANUALS AND DOCUMENTATION</b> .....	<b>24</b>

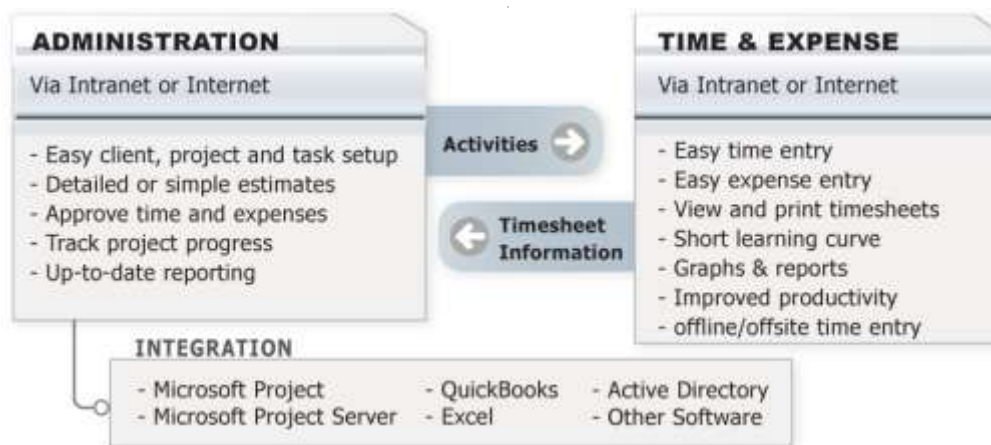
# 1

## What is DOVICO Timesheet?

In today's highly competitive marketplace, you need **every advantage** to manage professional time. DOVICO Timesheet eliminates the time wasted, and inaccuracies of, manually recording data. It allows you to keep track of all work-related or billable time and makes it easy to prepare estimates on similar projects.

This valuable asset to on-the-job productivity is also easy to use. With the click of a mouse, this innovative product eliminates the labor and takes the guesswork out of time keeping.

### DOVICO Timesheet Overview:



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

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

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

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

### DOVICO Timesheet also includes other components:

#### Job Scheduler

This software component allows you to perform Job Tasking Automation for the following functions:

- Setup Project Alerts to be notified by e-mail when projects reach established targets for time and costs
- Automated Reporting to employees and clients
- E-mail Notifications for time/expense approvals
- Backup and re-index databases

## Database Manager

This software component allows you to perform the following functions for any database:

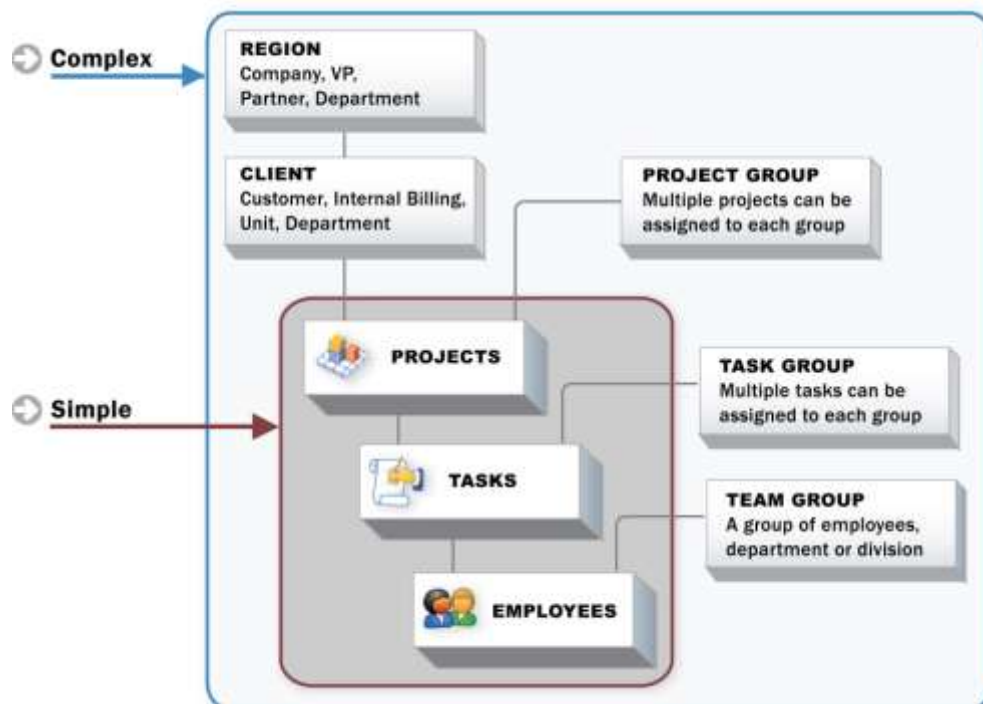
- Archive information
- Backup databases
- Create new databases
- Move a database
- Delete databases
- Re-index databases
- Rename databases
- Restore databases

Since this database manager can only be accessed from the computer (or network server) where DOVICO Timesheet is installed, it provides additional security to ensure that non-authorized personnel cannot access critical database functions.

## And Much More....

- **Offline Timesheet** for those individuals who need to track time when not connected to the database.
- **Import-Export tool**: Import or export data in XML, HTML and character separated formats; CSV, TAB, etc
- **Active Directory**: This integrated link to Microsoft's® Active Directory service allows employees to be imported from Active Directory and also authenticates DOVICO Timesheet logon user IDs and passwords against Active Directory.
- **Customize the terminology** according to your requirements (i.e. instead of Client, it could be Department, Business Unit, etc.).

## DOVICO Timesheet Typical Set-up




# 2

## DOVICO Timesheet Setup




The following basic steps are prepared to help you get started quickly. We will show you the steps to setup DOVICO Timesheet using the basic client, project and task levels. However, should you wish to enter additional levels of information, you can do so by adding groups.

This Exercise Book offers a simplified set of instructions designed to get you started. It, by no means, describes all the functions and features available in DOVICO Timesheet. To take full advantage of DOVICO Timesheet, we recommend that you review the User's Guide or Help files. All manuals are available from our website at: <http://www.dovico.com/client.html>

For those employees without administrative permissions and only entering time and expenses, you can immediately proceed to Section 3 on page 15.

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

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

- Click the **Contents** tab  to see a high level outline of the contents and to browse to a specific topic or subject matter.
- Click the **Index** tab  to see an alphabetical listing of keywords or phrases. Click on the keyword to see that topic.
- Click the **Search** tab  to query the entire help system for a particular term.

---

### Starting DOVICO Timesheet for the first time

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



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

## Setting up DOVICO Timesheet for time and expense entry

Other setup functions not detailed in this document include Budgets, Leave/Absences Rules, Regions, Teams, Currencies, Overtime Rates, Task Groups and Project Groups. Information on how to use these functions is found in the User's Guide and in the Help files.

### STEP 1 - Rates

In DOVICO Timesheet, **Rates** are the hourly pay and billing rates assigned to employees. Rates are multiplied by employee hours to calculate client and company costs. If you are not concerned with client and company costs, or if you are not using rates for payroll purposes, then rates are not required and you can move directly to Step 2 - Employees.

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




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

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

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

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

#### To add a new rate:

1. Click the **Rates** button  located in the Rates & Billing section of the side navigation bar.
2. Click the **New** button  on the toolbar.
3. Enter a unique **name** for the rate (up to 50 characters). As rates are usually created for either employees or categories of employees within your organization (John Smith, Maria Fernandez, Engineer, Senior Engineer, Project Manager), it is a good practice to clearly name each rate you create. For example "Engineer Wage Rate" for Rate of wages and "Engineer Charge Out Rate" for Rate charged.
4. Enter the **Rate per hour** amount. When editing a rate, a 'More' button is displayed to offer more options. When creating a new rate, this button can be ignored.
5. Enter a **description** (up to 250 characters).
6. Click **Save** .

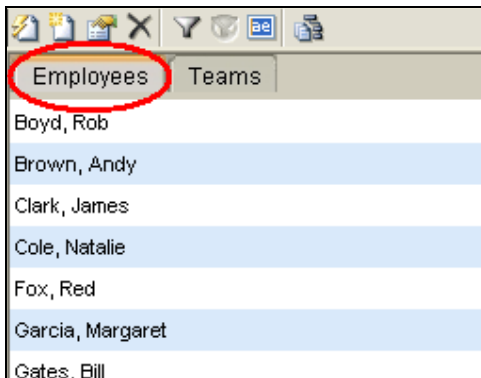
## STEP 2 - Employees

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

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


### To add an employee:

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



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

An **employee properties** window opens.

4. Enter the employee's **Last** and **First** names.
5. Enter the employee's unique **User ID** and **Password (case sensitive)**. These should be communicated to the employee as they are required to login to DOVICO Timesheet. Most employees are able to change their own passwords using the time entry tool.
6. (**Optional**) Select a **Team**  from the drop-down list.
7. Select a **Security level** from the drop-down list.

By default, the 5 internal security groups are:

- **Administrator:** Employees assigned to this security level can edit, add, delete, view and print information in every part of the software.
  - **Manager:** Employees assigned to this security level can edit, add, delete, view and print information from most views.
  - **Time and Expense entry:** Employees assigned to this security level only have access to time & expense entry. Access to administrative functions are denied.
  - **Team Lead:** Employees assigned to this security level can edit, add, delete, view and print information in only a limited number of views.
  - **Auditor:** Employees assigned to this security level can only view, print and export report information. All other DOVICO Timesheet options and views are inaccessible.
8. Select the **Software access** level for this employee from the drop-down list:
    - **[None]:** This employee cannot access any DOVICO Timesheet component or view.
    - **[Time and Expense Entry only]:** This employee has access to only time and expense entry views.
    - **[All]:** This employee has access to administrative and time and expense entry views.
  9. (**Optional**) From the **Limited Access** field, select which managers or Access Groups can access

this employee. Only the selected managers (or members of the selected access groups) are permitted to view and report on this employee. Complete instructions on Limited Access are available in the User's Guide or from the application's help files.

10. (Optional) Select a **Rate of wages** 🏠 from the drop-down list.

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

11. (Optional) Select a **Rate charged** 🏠 from the drop-down list.
12. Select a **Start** and **End date** for the employee.
13. (Optional) Enter the employee's e-mail address in the **E-mail address** field (up to 250 characters). The Job Scheduler uses this e-mail address when sending Automated Reports and Notifications.
14. Click **Done** to automatically save the information and close the window or click **New** to save the information and add another new employee.

### To specify additional employee settings:

The employee properties window's **Additional tab** permits Leave/Absences rules and Instant E-mail Notifications to be assigned to each employee.

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

The employee **properties window** opens.

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

### Entering leave/absences information and assigning accrual rules

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

1. Enter an **Employee Number** if applicable. This field is for information purposes only.
2. Enter the number of days that the employee works per week in the **Work days** field.
3. Enter the number of hours that the employee works per day in the **Working hours** field. The Working hours per day data is only required when employee accruals are calculated on a daily basis (see Leave/Absences rules in the help files or user's guide).

### Select Instant Email Notification options for the employee

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

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

send this employee an e-mail whenever one of his/her time or expense sheets has been rejected.

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

## STEP 3 – Workflows

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

2 types of approval workflows can be created:

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

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


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

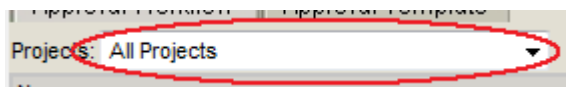
The instructions which follow describe how to create the first type of approval workflow (Sheet-based). Instructions on creating project-based workflow are available in the User's Guide or from the application's help files.


### Prerequisite:


- The employees (managers) designated to approve time and expenses should first be established (Step 2).


### To create a sheet-based approval workflow:



1. Click the **Approval Workspace** button  located in the Time & Expenses section of the side navigation bar.
2. Select the **Workflows** tab near the top of the screen.
3. Select the **Approval Workflow** tab located below the toolbar.
4. Select **All Projects** from the Projects drop-down list. The term 'All Projects' is used to identify the workflow as one that applies to **all time and expenses** regardless of which project the entries are associated with.



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

8. **(Optional)** Enter a **description** (up to 250 characters).
9. Select and transfer  the employees whose submitted entries will be forwarded to approving Managers. Selecting an employee already assigned to another workflow will move that employee to the new workflow.

**Tip:** You can graphically review approval paths for any employee by clicking the Employee **Approval Paths** button  on the toolbar.

10. From the list of **Available Managers** in the bottom left corner, select and transfer the managers that need to approve the time or expense entries to the Approving Managers list on the right. The Managers available list includes all employees with access to administrative views (assigned to "All" in the **employee properties** Software access field).
11. The order of the managers displayed in the **Approving managers** list represents the approving order. The first manager shown will need to approve the time or expenses before the second manager listed (if any) can approve the time or expenses, and so on. To change the order of an approving manager, select the manager and click the up  or down  arrow buttons.
12. Click **Done**.

The approval workflow is now setup, assigned and active.

## STEP 4 - Clients

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

### To add a client:



1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. Select **New Client (Details)** in the drop-down list at the upper left corner of the view. A **client properties** window opens.
3. Enter a unique client **Name** (up to 250 characters).
4. A client abbreviation is automatically created using the first 3 letters of the client name. Optionally modify the client **Abbreviation** (up to 20 characters). If modifying the abbreviation, be sure to add a hyphen "-" at the end of the abbreviation. The client abbreviation must be unique.
5. **(Optional)** Enter a **Contact name**. This information is kept for reference purposes only and does not appear in reports or invoices.
6. **(Optional)** Enter an **E-mail address** for the client. The Job Scheduler uses this e-mail address when sending Automated Reports and Notifications.
7. **(Optional)** Select a **Region** from the drop-down list. The region is used to apply different tax rates to each place of business (i.e. state, province, country) when invoices are prepared.
8. Click **Done** to automatically save the information and close the window.

## STEP 5 - Projects

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

Project information can include details such as a project manager, project start/end dates and project status.

### To add a project:

1. Click the **Project Assignments** tab located in the Project Workspace view. The Project Workspace view is located in the Projects section of the side navigation bar.
2. In the tree structure on the left, click on the **client**  associated with the new project.  
**OR** click the root **Assignments**  icon if the new project has no client. When a project is associated to a client, the combined client and project name (Client abbreviation + Project Name) appears in certain drop-down fields and reports throughout the application.
3. Select **New Project (Details)** in the drop-down list at the upper left corner of the view.

A **project properties** window opens.

4. Enter a unique project **Name** (up to 250 characters).
5. Select an employee from the **Manager** drop-down list.
6. (**Optional**) From the **Limited Access** field, select which managers or Access Groups can access this project. Only the selected managers (or members of the selected access groups) are permitted to view and report on this project. Complete instructions on Limited Access are available in the User's Guide or from the application's help files.
7. Select a **Project Status** from the drop-down list. The status is the state of the project. Only when Estimate or Active are selected is the project is available to employees for time entry. All other statuses are used for reporting and general information purposes only.
8. (**Optional**) From the **Group by** drop-down list, select which project group to associate with this project.
9. Select a '**Billing by**' option from the drop-down list.

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

10. Modify the **Start** and **End dates** for the project. These dates are used for reporting purposes only.
11. Enter a **Description** for the project (up to 250 characters). This project description is displayed to those entering time on this project.
12. Click **Done** to automatically save the information and close the window.

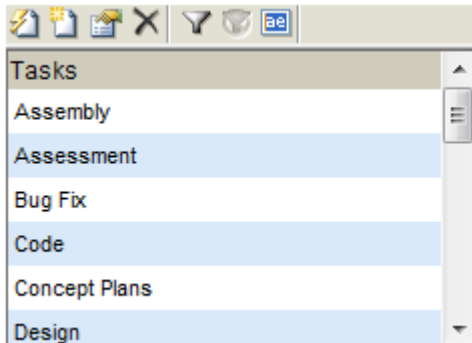
## STEP 6 - Tasks

**Tasks** are activities or work efforts against which employees track their time. Tasks are fundamental components required for time tracking.

Tasks can be generic and assigned to multiple projects (meeting, planning, etc.) or can be specific to only one project.

### To add a new task:

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



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

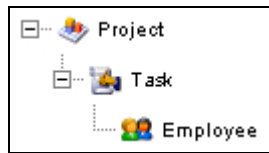
A **task properties** window opens.

4. Enter a unique task **Name** (up to 250 characters).
5. (**Optional**) Select a task group from the **Group by** drop-down list. A **More** button is displayed to the right of the Task Group field whenever a task is assigned to a task group. When a task is assigned to a task group, previous assignments made using this task group are not automatically updated. The More button accesses additional options to change previous assignments made using this task group.
6. (**Optional**) From the **Limited Access** field, select which managers or Access Groups can access this task. Only the selected managers (or members of the selected access groups) are permitted to view and report on this task. Complete instructions on Limited Access are available in the User's Guide or from the application's help files.
7. Enter a **Description** for the task (up to 250 characters). This description is displayed to those entering time against this task.
8. Enter a **Prorating** for this task. The prorating value is used to assign a proportionate value to this task when billing clients on time spent on this task.
 

Example: The task called MEETING has a prorating of 2 and Jane's hourly rate charged is \$100 per hour, the client cost for this task will be calculated as: \$100 x 2 x the number of hours worked.
9. Check the **Global** box if you want this task to be assigned to all projects that do not have specific assignments. For projects that have no specific assignments, global tasks are automatically assigned to the project and all employees are assigned to the global task.
10. Click **Done** to automatically save the information and close the window or click **New** to save the information and create a new task.

## STEP 7 - Assignments

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





*Simplified assignment structure*

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


To create a large number of assignments, you should consider using the **Quick Assign** view (next page).

### Important Tips:


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

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

### To assign tasks to projects:

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





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



3. Click the **Tasks tab** at the top of the Assignments List window. You can also assign Task Groups by selecting the Task Groups tab.
4. Select one or more **tasks** (or task groups) to assign to this project and click **OK**. To select more than one item, hold the **Ctrl** key while making your selections.

#### To assign employees to tasks:

1. Locate and select the **Task**  in the assignment tree.
2. Click the **Assign** button  located on the toolbar.
3. Click the **Employees tab** at the top of the Assignments List window. You can also assign Teams by selecting the Teams tab. Unlike when assigning by task group, the team level is not displayed in the assignment tree. The individual team members are displayed directly under the task.
4. Select one or more **employees** (or teams) to assign to this task and click **OK**. To select more than one item, hold the **Ctrl** key while making your selections.

#### Tip for Internet Explorer version 6.0 and above:

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

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


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

## Quick Assign

An alternate method for creating assignments is to use Quick Assign. The **Quick Assign** view is used to quickly assign tasks to projects, and to assign employees (teams) to tasks (task groups).

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

#### To create assignments using Quick Assign:


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

## STEP 8 – Time & Expense approvals

The **Time & Expense Approval** view is the location used to review and approve employee timesheets or expenses.

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

### To approve/reject timesheet entries:

1. Click the Approval Workspace button  located in the Time & Expenses section of the side navigation bar.
2. Select the **Time & Expense Approval** tab near the top of the screen.
3. Select a **timesheet** from the **To Be Approved** drop-down list. The list is divided by types of submission; time, expenses or time lockout.




The view consists of 2 tabs:

#### Summary tab

The Summary tab displays, in the top pane, summary information on the time submitted by project and task.

#### Details tab



The Details tab displays, in the top pane, submitted entries broken down by day. Details for any single entry are shown in the middle pane when any individual entry is selected within the top pane.

4. There are 3 options for approving/rejecting time entries.
  - To **approve all** time entries within a timesheet, click the **Approve** button  on the toolbar from either the Summary or Details tab.
  - To **reject all** time entries within a timesheet, click the **Reject** button  on the toolbar from either tab and enter a detailed **reason for the rejection**. This reason will be displayed to the employee who submitted the time entry.
  - To **approve some entries and reject others** within a timesheet:
    - a) Select the **Details** tab.
    - b) In the top pane, select the entries to reject by clicking in the cell (use the Ctrl key to select multiple entries).
    - c) Click the **Approve with Exclusions** button  on the toolbar.

### To approve/reject expense entries:

1. Select an **expense sheet** from the To Be Approved drop-down list.
 

There are 2 options for approving/rejecting expense entries.


  - To **approve all** expense entries within the sheet, click the **Approve** button  on the toolbar.
  - To **reject all** expense entries within the sheet, click the **Reject** button  on the toolbar.

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




# 3 Time and Expense Entry

Reduce internal training costs by learning how to enter time and expenses using DOVICO's free On Demand training accessible from our Clients page at: <http://www.dovico.com/client.html>. Or click the **Training** button from the logon screen.

Only once projects and tasks have been created and assigned to employees (Section 2, page 4) are users able to start tracking time and expenses using DOVICO Timesheet.

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

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

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

Instructions on how to enter time begin on the next page. For expense entry instructions, go to page 20.

---

## What you need to know

Projects and Tasks are used to identify what you are tracking. Projects and tasks are created and assigned by managers or empowered employees using DOVICO Timesheet's administrative functions and views.

**Project:** A project or process, the subject of a task (administration, production, sales, etc.).

**Task:** A task or activity (telephone, meeting, travel, etc.). Tasks are actions to be performed for each project.

This section introduces you to only the **very basic concepts** and commands required to track time. To fully benefit from all the features, please review DOVICO Timesheet's help system.

## Overview of the Time Entry screen

The time entry screen contains 5 specific sections designed to assist you in tracking time efficiently.

<p><b>1</b> The <b>Assignment Tree</b> displays an organizational representation of <b>all the tasks</b> you are able to track time against (your assignments). It is primarily used to add specific assignments to the timesheet grid.</p> <p><b>2</b> The <b>Timesheet grid</b> area of the screen displays assignments in a weekly grid and is the location where employees enter their time.</p>	<p><b>3</b> The <b>Time Entry Details</b> area of the screen displays a number of editable and non-editable fields detailing each time entry.</p> <p><b>4</b> The <b>Calendar Row</b> identifies the week displayed and permits the user to move to different weeks.</p> <p><b>5</b> The <b>Toolbar</b> displays buttons which carry out commands such as Submit, Start, etc.. The <b>Tabs</b> are used to navigate to other functions.</p>
--	---

The screenshot shows the DOVICO Timesheet v10 interface. The top navigation bar includes 'Timesheet', 'Expenses', 'Reports', and 'Options'. The toolbar (5) contains 'Submit', 'Offline', and 'Logout' buttons. The Assignment Tree (1) on the left lists organizational units like ACME, Development, Support, McAfee, and Leave/Absences. The Timesheet Grid (2) shows a weekly view for May 09 - May 15, 2010, with columns for days of the week and total/ETC columns. The Time Entry Details (3) for '1010 - ACME - Development - Code' shows 'Track Your Time' fields (Start: 08:00, End: 09:30, Duration: 1.50) and 'Task Progress' fields (Start: Thursday, January 01, 2009, Finish: Saturday, July 31, 2010, Budget - Actual: 75.00 - 10.75 = 64.25, Estimate To Complete (ETC): 60.00).

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	ETC
<b>1010 - Development</b>									
Assesment		5.00	1.00	3.00				9.00	12.00
Code		2.00	4.25	3.00	1.50			10.75	60.00
<b>McAfee - Support</b>									
E-Mail		1.00		0.50	0.80			2.30	
Phone			0.50					0.50	
Training			1.60	1.00				2.60	12.00
Web Meeting								0.00	8.00
<b>Leave/Absences</b>									
Vacation								0.00	
Approved								0.00	
Rejected								0.00	
Under Review								0.00	
		0.00	8.00	7.35	7.50	2.30	0.00	0.00	25.15

## STEP 1 - Add Assignments to the Timesheet grid

Before you can track time against an **assignment**, that assignment must be added to the timesheet grid. This step describes how to use the assignment tree to add task assignments to the timesheet grid.

1. Click the **Timesheet tab** located near the very top of the time entry screen.
2. Click the **Assignments tab**.
  - The Assignment tree displays an organizational representation of **all the tasks** you are able to track time against (your assignments). These are organized by client (optional), project, task groups (optional) and task.

<b>Client</b>	<input type="checkbox"/> DOVICO
<b>Project</b>	<input type="checkbox"/> Research
<b>Task Group</b>	<input type="checkbox"/> Support
<b>Task</b>	<input type="checkbox"/> Quality Control

- Clicking on the **+** symbol next to an item **expands** that item.
  - When the **checkbox** for a client, project or task group is checked, all **sub-items** are also automatically **checked**.
3. **Locate** and **check**  one or more assignments to be added to the timesheet grid.
  4. Click the **Add to Timesheet** button. All selected assignments are now displayed in the timesheet grid.

## Step 2 - Entering time

Time entry can be accomplished in three ways: Option **A**, entering a duration against a task (**Bulk**). Option **B**, track time while you work (**Timer**). Option **C**, enter Start/End times (**In/Out**).

### Option A: Enter time in bulk




1. In the timesheet grid, click in the **cell intersecting** the appropriate **task** and **day of the week**.
2. Enter the **number of hours** worked against that task. Time can be entered in hh:mm or in decimal format (3:30 or 3.5), but always appears in decimal format when saved. Time is automatically saved when you click elsewhere.

September 23 - September 29 2010	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	23	24	25	26	27	28	29
<b>Acme - Development</b>							
Data Analysis and Reporting							
Design							
Meeting							
<b>BMW - Crash Test Dummies</b>							
Research							
Specifications				2.5			
Testing							

Example: **2.5 hours** entered against the Crash Test Dummies' **Specifications** task assignment for Wednesday, September 26th.

3. (**Optional**) Modify or enter details for this time entry using the time entry details area of the screen (the lower half of the screen).
4. Repeat steps 1 and 3 for each time entry.



### Option B: Track time while working

1. Select the task to time against by clicking on the **task's name** in the timesheet grid. A selected row is highlighted in yellow.
2. Click the **Start** button  (located on the toolbar), or click the **Start from Last** button if available .
3. Click the **Stop** button  on the toolbar when you have stopped working on the task.
4. (**Optional**) While tracking time (or after), **modify** or enter details for this time entry using the time entry details area of the screen (the lower half of the screen).


### Option C: Track time using Start/End times

- Before you can enter start/end times for a time entry, you must enable "Show Start/End times" using the Options tab.
  1. In the timesheet grid, click in the **cell** intersecting the appropriate **task** and **day of the week**.
  2. In the Time Entry Details area of the screen (bottom), enter **Start** and **End** times for the time entry. Start and End times can be configured to either the 12 hour AM/PM or 24 hour formats. Make sure you are entering time for the proper task and day by verifying the task assignment's name in the Time Entry Details title bar.
  3. (**Optional**) **Modify** or enter other information for this time entry using the time entry details area of the screen.

#### Notes:

- Data is **automatically saved** whenever the user switches cells, changes views, etc. Data is not saved if the user logs out or closes the browser while adding or editing data in a field.
- The Timer function can only track time **on the current day**.
- The **maximum number of hours** that can be entered for any day is 23.98 hours (23:59).
- Time entries that have been **Submitted**  or **Approved**  cannot be edited.

#### Tips:




- While timing on a task, you can edit other time entries or move to different views within DOVICO Timesheet.
- To view time for **multiple weeks**, run any one of the numerous time reports located in the Reports tab.
- Increase the **timesheet grid area** of the screen by minimizing  or resizing the time entry details and/or the assignment tree.
- The **ETC column** and some information in the time entry details area can be hidden. Click the **Options** tab to personalize the time entry screen.
- Mouse over the project or task names in the timesheet grid or in the assignment tree to see their **descriptions**.

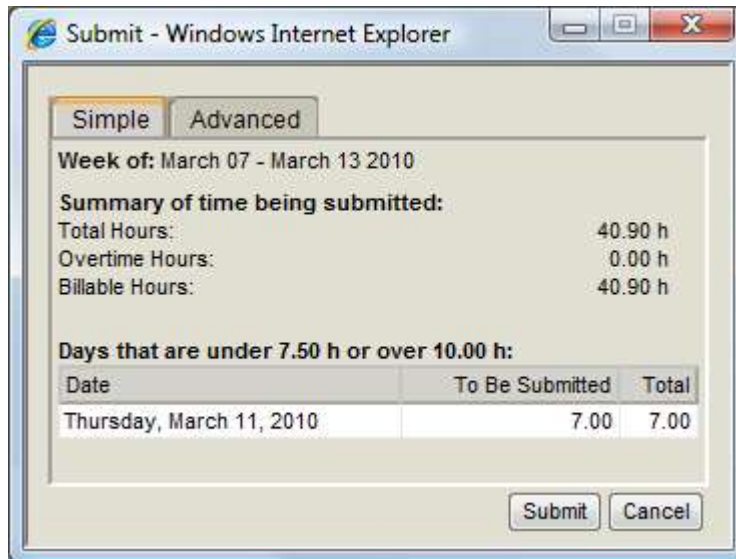
## Step 3 – Submitting Time

Periodically, as defined by your manager or system administrator, you must submit your time entries for review, approval, etc.

**Warning:** Once time entries have been submitted, they are no longer available to be edited. However, additional time entries can be added and submitted for the same date range.

### To submit time for the week currently displayed:

1. Move to the applicable **week** by clicking the calendar row's arrow  (or  ) buttons.
2. Click the **Submit** button  **Submit** on the toolbar. The Submit window opens.



3. Click the **Simple tab**. You can submit time spanning a smaller or greater date range by clicking the Advanced tab.
4. Review the **Summary statistics** for the time to be submitted.
  - **Total Hours:** The total number of hours to be submitted for the week.
  - **Overtime hours:** The total number of overtime hours to be submitted for the week.
  - **Billable hours:** The total number of billable hours to be submitted for the week.
  - **(Optional) Days that are under...:** Lists the days not meeting the minimum or maximum hours as setup in the Options tab.
5. Click **Submit**.

**Note:** Those submitting time on a **daily basis** can use the instructions above (*To submit time for the week currently displayed*) as the software prevents time entries from being submitted more than once.

## Overview of the Expense Entry screen

The Expense Entry screen (**Expenses**) contains 3 sections designed to assist you in entering and submitting expenses.

<p><b>1</b> The <b>Expense Sheet Properties</b> area identifies the expense sheet displayed and permits the user to view other expense sheets.</p> <p><b>2</b> The <b>Expense Entry Grid</b> area is where individual expenses and their details are entered.</p>	<p><b>3</b> The <b>Toolbar</b> displays buttons which carry out commands such as Create new sheet, Submit expenses, etc..</p> <p>The <b>Tabs</b> are used to navigate between active, rejected and approved expense sheets.</p>
---	---

The screenshot shows the DOVICO Timesheet interface with the 'Expenses' tab selected. The interface is divided into three main sections highlighted by red boxes and numbered callouts:



- Callout 1:** The 'Expense Sheet Properties' section, which includes a dropdown for 'Active sheets' (currently 'Training - Chicago'), input fields for '\* Sheet name' and '\* Project', and summary statistics for 'Reimbursable total' and 'Sheet total'.
- Callout 2:** The 'Expense Entry Grid', a table with columns for Date, Expense Category, Quantity, Amount, Reimbursable status, and Description.
- Callout 3:** The 'Toolbar' and 'Tabs' section, which includes buttons for 'New Sheet' and 'Submit', and tabs for 'Active Sheets (1)', 'Rejected Sheets (0)', and 'Submitted/Approved (Owed: \$215.50)'.

* Date	Expense Category	Quantity	Amount	Reimbursable	Description
4/5/2010	[None]		\$42.98	No	Power Adapter
4/5/2010	Meals		\$13.92	Yes	
4/6/2010	Transportation		\$15.00	Yes	Taxi
4/8/2010	Accomodations		\$348.95	Yes	Marriott - 2 nights
4/8/2010	Mileage (\$0.38 per mile)	145.00	\$55.10	Yes	Personal vehicle

## Step 1 – Enter Expenses

In DOVICO Timesheet, expense entries are organized by sheets. Each expense must belong to a sheet and each sheet must be assigned to a project.

### To enter an expense:

1. Click the **Expenses tab** to access the Expense entry view.
2. Click the **Active Sheets** tab in the upper left corner.
3. Click the **New sheet** button  on the toolbar to create the new sheet.
4. Enter a **Sheet name**.
5. Select a **project** for this sheet from the Project drop-down list.
6. Click in an empty row (the row with the asterisk \* at the far left).
7. **(Optional)** Modify the expense **date** by clicking in the date cell and then clicking the calendar button .


**Note:** Mileage or other rate based expenses can be entered using the Expense Entry view. Look for 'Entering Mileage' in the help files.

8. **(Optional)** Select an **Expense Category** from the drop-down list.
9. Enter an **amount** for the expense.
10. **(Optional)** Select if this expense is **reimbursable**.
11. **(Optional)** Enter a **description** for this expense (up to 4000 characters).
12. Additional **columns** may have been added by your manager. Enter data as required.

## Step 2 – Submit Expenses

**Warning:** Once an expense sheet is submitted, it is no longer available for editing or available to add more expenses.

### To submit an expense sheet:

1. Select the **sheet** to submit from either the Active or Rejected sheets drop-down lists.
2. Click the **Submit button**  on the toolbar.

The submitted sheet is placed in the Submitted/Approved tab.

### Notes:

- Sheets must be **submitted as a whole**. Individual expenses from within a sheet cannot be submitted.
- When expense sheets are submitted, the user's name and date range are automatically added to the Sheet name. Expense sheet date ranges are based upon the minimum and maximum expense entry dates within each sheet.

# 4

## Custom Reports, Data mining & Linking

DOVICO Timesheet includes a very powerful SQL database, which can be accessed directly through other applications. To assist you, we provide many free tools, code examples, file formats, custom reports, and other information from our web site.

### Options:

1. **Export any report** in DOVICO Timesheet for further customization. Simply create the report and click the export button to move the report to another application (Excel, Word, etc.).
2. **Create a custom report** with Crystal Reports software ([www.businessobjects.com](http://www.businessobjects.com)) or easily edit any of the existing DOVICO Timesheet reports and save it under a different name. Add these reports to DOVICO Timesheet's Custom Reports folder for future use. All custom reports are available to managers to access with DOVICO Timesheet. See DOVICO Timesheet help for more information, or visit our client web site at <http://www.dovico.com/client.html> for additional custom reports.
3. **Download new reports (free)** at any time from our web site: <http://www.dovico.com/reports.html>
4. **Data mining or business intelligence tools** can be used to extract data from the DOVICO Timesheet database. For example, using Crystal Reports or Excel, you can easily select specific fields in DOVICO Timesheet tables and create custom reports using your own business rules or visit our Developers web site for code examples in XML, etc. <http://www.dovico.com/developer.html>
5. **Linking with other software is done using the Import/Export Tool** included with the software. Create a template to pull information from the database, and place it into your other applications. See **Import/Export** in DOVICO Timesheet **Help**.

# 5

## Technical support

General e-mail: [info@dovico.com](mailto:info@dovico.com)  
Support: [support@dovico.com](mailto:support@dovico.com)  
Knowledge base: <http://www.dovico.com/techtips.html>  
Online Support form: <http://www.dovico.com/support.html>

### **DOVICO United States**

2020 Pennsylvania Ave NW, #459  
Washington, DC 20006 USA  
Sales toll free: 1-800-618-8463  
Fax: 1-506-384-0727

### **DOVICO Canada**

236 St George Street, Suite 119  
Moncton, NB, Canada  
E1C 1W1  
Sales toll free: 1-800-618-8463  
Fax: 1-506-384-0727

### **DOVICO United Kingdom**

Time Tracking Software  
1 Silk House, Park Green, Suite #104  
Macclesfield, Cheshire, UK  
SK11 7QJ  
International Sales toll free: 00 800 4618 8463  
Fax: +44 (0) 1625 429888

### **DOVICO CORPORATE HEAD OFFICE**

P.O. Box 27058  
Dieppe, NB  
CA, E1A 6V3  
Phone: 1-506-855-4477  
Fax: 1-506-384-0727

# 6 Manuals and Documentation

## **INFORMATIONAL DOCUMENTS:**

Detailed Installation Guide: <http://www.dovico.com/client.html>

Downloadable DOVICO Timesheet Manuals, Instruction Guides, and other information:  
<http://www.dovico.com/client.html>

## **INTERNET:**

Frequently Asked Questions (FAQ's)... [http://www.dovico.com/dovico\\_timesheet/timesheet\\_faqs.html](http://www.dovico.com/dovico_timesheet/timesheet_faqs.html)

Online Knowledge Base (KBase)... <http://www.dovico.com/techtips.html>

## **OTHER INFORMATION:**

Application linking and Database schematics... <http://www.dovico.com/developer.html>

Free Reports (published weekly)... <http://www.dovico.com/reports.html>

Training & Professional Services... [http://www.dovico.com/time\\_management\\_software.html](http://www.dovico.com/time_management_software.html)

Client Files & Manuals... <http://www.dovico.com/client.html>

Software Awards... <http://www.dovico.com/awards.html>

Purchase Information... <http://www.dovico.com/purchase.html>

Time & Project Management Articles... <http://www.dovico.com/tips.html>

Corporate Information... <http://www.dovico.com/about.html>

Copyright © 1989-2009 Les Entreprises DOVICO Enterprises, Inc.

Document No: ExerciseBookDTV10-01

## NOTES

---