

Dovico Planning & Timesheet

Hosted – September 2016

QUICK START GUIDE

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What is Dovico Planning & Timesheet?

In today's highly competitive marketplace, you need **every advantage** to manage your employee time. Dovico Planning & Timesheet software eliminates the time wasted, and inaccuracies of, manually recording data. It enables you to keep track of all work-related or billable time and makes it easy to prepare estimates on 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.

In a typical multi-user environment, **everyone** uses timesheet entry tools on a daily basis for time and expense entry while **managers** or empowered employees use the administrative functions for project planning, monitoring and reporting.



DOVICO PLANNING & TIMESHEET COMPONENTS:

Dovico Planning & Timesheet includes two major categories of functions; administrative functions used by managers for setup, monitoring and reporting, and time and expense entry views used by everyone to enter time and expenses.

Dovico Planning & Timesheet includes other useful tools:

- **Dovico Apps** to extend the functionality of the core software (<http://www.dovico.com/apps.aspx>).
- **Job Scheduler** used to automate some reporting and notification functions.
- **Import/Export App** to import or export employees, projects, tasks, time entries, etc., (<http://www.dovico.com/apps.aspx>).
- **Microsoft® Project Synchronization**
- QuickBooks® integration via our **QuickLink** app from (<http://www.dovico.com/apps.aspx>).
- **Active Directory**: An integrated link to Microsoft's® Active Directory service allows employees to be imported from Active Directory and also authenticates login user IDs and passwords against Active Directory.

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14 Day Trial

DOVICO PLANNING & TIMESHEET

Online 14-Day trial

Simply click on the *Login to Dovico* link provided in the e-mail received following your completion of the sign up form and then go to the next page of this guide to get on your way.

A personalized database is created when using the 14 day trial. This database is available anytime during your 14 day evaluation.

Important things to note:

- Free technical support is available for your 14-Day trial period.
- Before using Dovico Planning & Timesheet, popup blockers should either be disabled or have the site where the software is installed flagged as a safe site for your popup blocker.
- Dovico Planning & Timesheet is delivered with a demo database to help you review and familiarize yourself with the software.

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Administrative Functions

Dovico Planning & Timesheet's administrative functions are used to create the projects and tasks all employees track their time against, and to monitor and report on time, costs, progress, etc. for one or more projects.

Administrative functions are only available to those users with suitable software access rights and security levels as defined when each user is added to the software.

LOGIN IN

If evaluating using our **14-Day Online trial**, click on the *Login to Dovico* link provided in the e-mail received following your completion of the sign up form. The first time you login, you will be brought to the Welcome to your Trial screen which offers quick access and video tutorials to the key areas of the software.

Before using Dovico Planning & Timesheet, popup blockers should either be disabled or have the site where the software is installed flagged as a safe site for your popup blocker.

NAVIGATING WITHIN DOVICO PLANNING & TIMESHEET™:





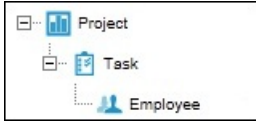
Dovico Planning & Timesheet offers access to all views and tools through the **Menu** button located in the upper left corner.

To access the time and expense entry views, click the **My Time & Expenses** option in the menu.

This Quick Start Guide does not detail how to setup and use the software, but instead directs you to several key views based on general and specific requirements for time and project management. For detailed instructions on how to setup and use Dovico Planning & Timesheet, please refer to the Help files or the User's Guide.


GENERAL REQUIREMENTS

Before employees can begin tracking their time and expenses, these general requirements must be completed.

 Employees	<p>In Dovico Planning & Timesheet, anyone who enters time and expenses, or who manages, monitors or reports on project activities is considered an Employee.</p> <p>The Employees list pane (<i>Menu > Views tab > Employees & Projects > Project Assignments</i>) is the location where employees using the software are listed and can be added or edited. For each employee, a profile stores their user id, password, security level, their pay/charge out rates and many more useful details.</p>
 Projects	<p>Projects are the combined endeavors undertaken to create a unique product, service or result. A project is a mandatory component required for time tracking. Project information can include details such as a project manager and project status.</p> <p>Projects can be created in 2 distinct areas within the software. They can be created from the Project Planning tool or they can be created in the Employees & Projects section. Where you choose to create your project depends on the type of project and its need to be accurately scheduled.</p> <p>You create a project using the Project Planning tool if you have to accurately plan a project's schedule based on available resources, or to determine if you have the resources available to undertake a project, and to make it profitable. You also use the Project Planning tool for projects that require accurate tracking against budgeted time and costs while the project is in progress. (<i>Menu > Views tab > Projects Planning > Project Scheduling</i>)</p> <p>You use the Employees & Projects section if the project does not need a schedule or a detailed plan. These are normally administrative tasks that are 'Support' type work, where it is important to keep track of time and costs, but not necessary to schedule and plan the work (<i>Menu > Views tab > Employees & Projects > Project Assignments</i>)</p>
 Tasks	<p>Tasks are activities or work efforts against which employees track their time. Tasks are mandatory components required for time tracking.</p>
 Assignments	<p>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.</p> <div data-bbox="762 1388 1019 1507" style="text-align: center;">  </div> <p style="text-align: center;"><i>Simplified assignment structure</i></p>

These four steps (adding employees, projects, tasks and creating assignments) are the minimum steps required to be completed before employees can begin tracking time and expenses. The next page outlines what is required for more targeted goals such as creating estimates/budgets, etc.

(Optional)





 Currencies	<p>Currencies is an optional feature making currency selection options available to users so that expenses, employee wages, and other data affecting costs can be entered in any of the enabled currencies. This feature also permits costs to be viewed in any currency within the software. (<i>Menu > Setup tab > Currencies</i>)</p>
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SPECIFIC GOALS




Are projects on time and on budget?

 Project Planning	The Project Planning tool is used to establish detailed company and client cost budgets (estimates) and for those tracking actual time and costs against estimates. (<i>Menu > Views tab > Projects Planning > Project Scheduling</i>)
 Reports	The Reports view is used to display a wide variety of time and cost reports. For example locate and run the Project Time & Costs report to view one of the many available reports. (<i>Menu > Views tab > Reports</i>)

Collect time for payroll purposes, review and approve employee timesheets and expenses?

 Time & Expense Approvals	The Approval Workspace area is used to review, approve or reject time and expenses submitted by employees. (<i>Menu > Views tab > Approval Workspace > Time & Expense Approval</i>)
 Workflow	The Workflows tab is used to establish which manager must approve an employee's timesheet and/or expense submissions before those submissions can be processed for project costs, billing, reports, etc. (<i>Menu > Views tab > Approval Workspace > Workflows</i>)
 Leave/Absences Rules	The Leave/Absences Rules view allows a manager to apply the policies that automatically calculate how much vacation, sick leave, and other leave that an employee accumulates. (<i>Menu > Setup tab > Leave/Absences Rules</i>)
 Reports	The Reports view is used to display a wide variety of time related reports. Locate and run the Time entries by Employee report to see actual hours worked for each employee by date, project, and task. (<i>Menu > Views tab > Reports</i>)

Track time and expenses to accurately bill clients?

 Clients	<p>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.</p> <p>Clients are added and edited from the Assignment tree in the Project Assignments tab. (<i>Menu > Views tab > Employees & Projects > Project Assignments tab</i>)</p>
 Approved Expenses	The Approved Expenses view is used to review or edit expense information. (<i>Menu > Views tab > Approved Expenses</i>)
 Reports	The Reports view is used to display a wide variety of costing and billing reports The Client Time and Costs report provides a summary of actual hours worked, and the client and company costs. (<i>Menu > Views tab > Reports</i>)

4 Time and Expense entry

Only once projects and tasks have been created and assigned to employees (Section 3) are users able to start tracking time and expenses using Dovico Planning & Timesheet. Projects and tasks are used to identify what you are tracking. Projects and tasks are created and assigned by managers or empowered employees using the software’s administrative functions and views.

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 the software’s help system or the User’s Guide.

Time and Expense entry views are available to all employees tracking their time and expenses. To quickly learn how to enter time, access Dovico’s free On Demand Training by clicking on the [Training Videos](#) button from the Login screen.

HOW EMPLOYEES ENTER TIME AND EXPENSES

Each employee is assigned a unique User ID and Password from the administrative tools. These should be communicated to each employee along with the URL required to launch Dovico Planning & Timesheet.

To enter time against a task:

The time entry screen is accessed by clicking the My Time & Expenses option in the Menu.

1. Check the **task assignments** you wish to track time against (from the assignment tree on the left).
2. Add these to the weekly grid by clicking the **Add to Timesheet** button.
3. In the timesheet grid, click in the **cell intersecting** the appropriate **task** and **day of the week**.
4. Enter the **number of hours** worked against that task.
5. Optionally enter **details** for the time entry using the lower part of the screen.
6. Enter time on other task assignments as required.
7. Click the **Submit** button once all entries have been made for the day, week or as chosen by your company policies.

The screenshot displays the 'Timesheet' interface with tabs for Expenses, Reports, and Options. A navigation bar includes a 'Submit' button and various icons. The main area shows a weekly grid for 'November 09 - November 15 2014'. The grid columns are Sun (9), Mon (10), Tue (11), Wed (12), Thu (13), Fri (14), Sat (15), Total, and ETC. The grid rows are categorized by task assignments:

- ACME - Development**: Data Analysis and Reporting (5.00, 1.00, 3.00, 9.00), Design (2.00, 4.25, 3.00, 1.75, 11.00, 40.00)
- BMW - Crash Test Dummies**: Research (1.00, 0.50, 0.80, 2.30, 12.00), Specifications (0.50, 0.50, 8.00), Testing (1.60, 1.00, 2.60, 25.00)
- Leave/Absences**: Bank Holiday (0.00), Vacation (0.00)

A summary row shows: Approved 0.00, Rejected 8.00, Under Review 7.35, 7.50, 2.55, 0.00, 0.00, 25.40. Below the grid, the selected task '11/13/2014 - ACME - Development - Design' is detailed with 'Track Your Time' (Start: 08:00 AM, End: 09:45 AM, Duration: 1.75) and 'Task Progress' (Start: Wednesday, April 23, 2014, Finish: Wednesday, April 23, 2014, Budget - Actual: 55.00 - 11.00 = 44.00, Estimate To Complete (ETC): 40.00).

To enter an expense:

The expense entry screen is accessed by clicking the Expenses tab near the top of the screen.

1. Click the **New sheet** button on the toolbar to create the new sheet.
2. Enter a **Sheet name**.
3. Select a **project** for this sheet from the Project drop-down list.
4. Enter **information** in the applicable expense view columns.
5. Click in an empty row to save the entry and create a new row.
6. Click the **Submit** button once you have entered/verified each entry for the expense sheet.

MENU ▾
My Time & Expenses / Expenses

Timesheet
Expenses
Reports
Options

New Sheet
Submit
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Active Sheets (1)
Rejected Sheets (0)
Submitted/Approved (Owed: USD \$250.78)

Active sheets: Training ▾

* Sheet name: Training Reimbursable total: **USD \$603.19**

* Project: XYZ-Programming ▾ Sheet total: **USD \$724.19**

	* Date	Expense Category	Quantity	Amount	Converted Amount	Reimburs...	Billable	Description
...	10/20/2014	Administration		USD \$121.00	USD \$121.00	No	Yes	
🔗	11/3/2014	Meals		GBP £27.20	USD \$45.73	Yes	Yes	
...	11/3/2014	Transportation		EUR €22.00	USD \$30.44	Yes	Yes	Taxi
...	11/5/2014	Accomodations		JPY ¥31,700.00	USD \$310.34	Yes	Yes	2 nights
🔗	11/8/2014	[None]		EUR €123.38	USD \$170.70	Yes	Yes	
🔗	11/17/2014	Mileage (USD \$0.38 per mile)	121.00	USD \$45.98	USD \$45.98	Yes	Yes	Personal Vehicle

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Contact Information

SALES SUPPORT

Please contact our helpful sales personnel who will gladly assist you with your order or discuss your corporate requirements:

By Telephone:

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

Sales - International toll free number: 00 800 4618 8463

Through the Internet:

<http://www.dovico.com> or by e-mail at sales@dovico.com

TECHNICAL SUPPORT

Through the Internet:

Support email: support@dovico.com

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

By Telephone:

Toll Free North America: 1-800-618-8463

Toll Free International: 00 800 4618 8463

Direct: 1-506-855-4477

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