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What Is Time-Assistant?

Time-Assistant is a Web/Intranet tool that enables users to effectively manage working time, expenses and hourly rates of employees/teams/departments, track project status, automatically calculate salaries and generate different time-&-cost reports, prepare project estimates and get invoices via web-interface. The tool can be successfully used for any project-oriented companies where time management is an important issue.

Time-Assistant may be successfully used by:

- employees who need to carefully track their time spent on certain tasks, projects and work-types;
- team/project leaders who need to have a tracking tool capable of generating accurate and well-timed reports on time and money spent while doing different tasks and projects;
- managers who require structured information to optimize staff management, increase productivity and cope with rates/salaries;
- time-based consultants like IT specialists, accountants, lawyers, etc, who need a convenient time assessment tool.

Time-Assistant is accessed using a web browser and requires no client installation (a single server installation will suffice). It includes all the standard timesheet and hourly rate entry functions, project tracking abilities, as well as automatic salary calculation and comprehensive time-&-cost reporting. You may add an unlimited number of employees with no preset limits on the number of tasks, projects, rates, clients, departments, and positions – all to be carefully tracked and monitored.

Why Use Time-Assistant?

By presenting the product's best features along with the benefits they promise, a chart below is intended to demonstrate why Time-Assistant may prove to be exactly the tool you need for your business.

FEATURE	BENEFIT
Users/Departments/Positions Management System	Facilitates managerial work quite considerably.
Division of Users by Categories	Determines user abilities and access rights.
Convenient Scheme For Timesheet Filling	To add a new Timesheet record, users just need to be included in an employee list of at least one of the projects.
TimeTrack	A quick view-only summary of total working time spent by employees for a selected period.
Project Tracking Abilities	Keeps a close eye on a project by tracking its tasks, deadlines, etc.
Division of Projects into Tasks	Very handy project subdivision feature with each task having its employees, estimated time, start date, deadline, etc. (optional for every project).
Project Notifications Support	Notifies responsible staff members of missed deadlines or total duration of projects or tasks.
Work Type and Rate Management System	Sets different work types for each department, user and client rates for work types, enables rate history tracking and more…
Absence Types	Sets different absence types (vacations, sickness, etc), user rates for absence types.
Holidays and Days Off	Allowed assign/reset Holidays and Days Off both on a corporate basis and for specific users.
Approvals	Time-Assistant provides a convenient approval scheme. Each TimeTrack or Expense record may be approved or rejected, while for TimeTrack entries there's an ability of setting payment percentage for every single one of them.

Client Information Subsystem	Provides quick view of the list of company clients along with their personal attributes and rates. Allows clients to log into the system without assistance and receive reports and invoices.
Expenses Support	Calculate your running costs incurred from work-related tasks and/or purchases.
Comprehensive Report System	Makes reporting a fast and enjoyable procedure. All reports are available in a printable format.
Pay Periods	Create fixed date periods for a handier view of TimeTracks and Reports.
Project Estimate	Get your project estimates with details on time spent per every single task by employee, overestimated / underestimated time (if any), etc.
Export to XLS files	Any reports, along with the list of users and TimeTracks of employees may all be exported to Excel.
Export to QuickBooks	Users, Clients, Projects, Work Types, Current User Rates, Users Timesheets may be exported to QuickBooks.
Multilanguage Support	Choose a language for the application interface.
Status Center	Use the Web to determine whether or not a staff member is in, out, at lunch or on vacation. The Center also represents a centralized location where members can look up phone numbers, email addresses and other contact information.
User TimeTable	Helps set your daily routine to facilitate managerial work.
Personalized Profile	Provides quick access to user personal information with an ability to change it at any time.
Personalized Display Settings	Allows easy setting of the preferred display mode.
Currency support	All salary reports can be received in basic currency. It's possible to use any number of other currencies parallel with the basic one to specify rates and expenses of users and clients. Currency exchange rates are supported.

Time Zone Support	Time-Assistant may involve users from all around the world.

Time and Date format support	Time-Assistant supports different date and time formats and makes it possible to set a working week start date, the report total time format, etc.
Intranet Logon	Log on to Time-Assistant automatically using web server variables.
Reliable Crack Protection	User rights get authenticated on a server side.

Terminology (Glossary)

Absence Type

The reason of user absence (sickness, vacation, etc.).

Administrator

A user without any restrictions as to viewing and editing all kinds of information within the application, a supervisor for the rest of employees. Possesses unlimited user rights.

Approval

Act of accepting timetrack records and setting payment percentage for them.

Client

A party which your professional services are rendered for. This may be your own company, a third party client company or a third party individual.

Department

A division unit of a company/business specializing in a particular product or service, e.g. Software Development Department.

Employee

A person who works for a company in return for financial or other compensation. Enjoys the minimum of Time-Assistant user rights.

Expenses

Charges incurred from work-related tasks and purchases (mileage, food, office supplies, etc.).

Manager

A user administering a certain group of users only.

Pay Period

A fixed period for custom Report and TimeTrack views.

Position

A post of employment in a company, a job. E.g. Junior Programmer, Senior Programmer, Graphic Designer, etc.

Project

A set of tasks representing work done by a group of users over a period of time.

Project Leader

A user appointed as a specific project supervisor.

Profile

Personal information characterizing the application user.

Rate

A cost per unit of working time (per hour or per date) for a particular work or absence type.

Report

A formal account of the proceedings or transactions performed by a user or a group of users.

Timesheet

A sheet that records the number of hours and minutes spent by users working on a task.

TimeTrack

A quick view-only summary of the total working time spent by users for a selected period.

User

Anyone accessing Time-Assistant.

User Permissions (Level, Category)

Groups the company's personnel are broken down into in order to to determine how much of the Time-Assistant functionality is available to them in particular.

User Status

Position of a Time-Assistant user relative to that of others; standing (e.g. current location, availability, etc.).

User TimeTable

A page where users can determine their daily routine to facilitate managerial work.

Work Type

A category of work done by a user.

How Time-Assistant Works

Order of Operation

The only things Time-Assistant users require are Internet access and a web-browser. Using an intuitive browser interface, Employees can fill out timesheets, while Administrators and Managers can further view, approve and analyze time logged by employees in their assigned workgroup, as well as assign hourly rates.

The first person to sign up and log on to the system becomes an Administrator. His account is made up automatically in process of database creation.

Right upon the first Administrator logon, we recommend the following order of operation:

Step 1: Verify profile and display settings.

Step 2: Verify the application settings.

Step 3: Add company departments.

Step 4: Add company positions (if enabled).

Step 5: Add work types for each department (if enabled).

Step 6: Add users and their pay rates (if enabled).

Step 7: Add clients and their charge rates (if enabled).

Step 8: Add projects (if enabled).

From then on each Employee or Manager that you've added to the system becomes capable of logging on to Time-Assistant using the login and password preset by the Admin in order to fill in their timesheets. Time information entered by Employees can then be processed by Managers and Administrators in terms of getting approval, setting pay rates and generating time-&-cost, client and other reports from the set of standard report types available.

User Permissions

Time-Assistant has been designed for the following user categories: **Administrators, Managers** (in the Enterprise version) **and Employees.**

Employee is a basic Time-Assistant user enjoying the following features:

➢ **VIEW-ONLY**:

- List of users;
- Status of other users;
- Timetables of other users;
- PERSONAL rates;
- List of departments;
- List of positions;
- List of pay periods;
- List of absence types;

- PERSONAL timetrack (with an ability to submit it for approval);
- TimeTracks of other users of those allowed to be viewed;
- PERSONAL approvals and those of other Employees whose TimeTracks are allowed to be viewed;

➢ **VIEW AND EDIT**:

- List of work types (if duly authorized by a supervising Manager/Admin);
- List of clients and client rates (if duly authorized by a supervising Manager/Admin);
- List of projects (including tasks) (if duly authorized by a supervising Manager/Admin);
- Tasks for projects assigned by the Admin;
- List of expenses (if duly authorized by a supervising Manager/Admin);
- PERSONAL timesheet records;
- PERSONAL absence days;
- PERSONAL status;
- PERSONAL timetable;
- PERSONAL Profile and Display Settings;

➢ **GENERATE AND EXPORT**:

- This section relates to Reports. Those available to an Employee are:
  - PERSONAL Timesheet Report for a certain period as well as the Timesheet Reports on Employees, whose TimeTracks are allowed to be viewed;
  - Timesheet Report by Projects of PERSONAL involvement for a certain period (also available are timesheets of all users involved in a project);
  - PERSONAL Work Type Report along with those on Employees whose TimeTracks are allowed to be viewed. Here the total hours per work type will be available to all users included in the report, while pay rates – to the Employee only;
  - PERSONAL Work Type Report by Projects of PERSONAL involvement for a certain period. Here the total hours per work type will be available to all users included in the report, while pay rates – to the Employee only;
  - PERSONAL Summary Report along with those on Employees whose TimeTracks are allowed to be viewed. The pay rates will be available to the viewer Employee only;
  - Estimate for Projects of personal involvement;

- PERSONAL Involvement in Projects Report along with those of Employees, whose TimeTracks are allowed to be viewed;
- Current Client Rates Report (if duly authorized by a supervising Manager/Admin);
- TimeTable report for all users.

Manager is a user administering a group of employees. The number of hierarchical Manager Levels is unlimited. Managers have access to the following features:

- **VIEW ONLY**:
  - List of departments;
  - List of pay periods;
  - List of absence types;

- **VIEW AND EDIT**:
  - List of Users;
  - Add new Managers of lower Levels and Employees;
  - Edit PERSONAL properties as well as those of SUBORDINATE Employees and Managers;
  - View and edit PERSONAL status as well as those of SUBORDINATE Employees and Managers;
  - View and edit PERSONAL timetable as well as those of HIS SUBORDINATE Employees and Managers;
  - View and edit PERSONAL rates as well as those of SUBORDINATE Employees and Managers (if duly authorized by a supervising Manager/Admin);
  - View and edit a List of Work Types (if duly authorized by a supervising Manager/Admin);
  - View and edit a List of Clients and client charge rates (if duly authorized by a supervising Manager/Admin);
  - View and edit a List of Projects (including Tasks) (if duly authorized by a supervising Manager/Admin);
  - Tasks for projects assigned by the Admin;
  - View and edit a List of Expenses (if duly authorized by a supervising Manager/Admin);
  - Add/edit/delete PERSONAL timesheet records and add/edit/delete/approve those of SUBORDINATE Employees and Managers;
  - Add/edit/delete PERSONAL absence days and add/edit/delete those of SUBORDINATE Employees and Managers;
  - Assign/reset Holidays and Days Off for SUBORDINATE Employees and Managers;
  - Edit PERSONAL profile and display settings as well as those of SUBORDINATE Employees and Managers;

- **GENERATE AND EXPORT:**

- This section relates to Reports. Those available to a Manager are:
  - Timesheet Report - Personal as well as ones on SUBORDINATE Employees and Managers;
  - Timesheet Report by Projects of PERSONAL involvement (with timesheet displayed for all users involved in such projects (if permitted));
  - Work Type Report on SUBORDINATE Employees (with work type hours displayed for all users (if permitted), and pay rates - just for SUBORDINATE Employees and Managers);
  - Work Type Report by Projects of PERSONAL involvement (with work type hours displayed for all users involved in such projects (if permitted), and pay rates - just for SUBORDINATE Employees and Managers);
  - PERSONAL Summary Report rates along with those of SUBORDINATE Employees and Managers;
  - Estimates on Projects of personal involvement;
  - Employees Involved in Projects Report on SUBORDINATE Employees and Managers;
  - Manager Subordinates report on all Managers;
  - Current User Rates Report by Departments on SUBORDINATE Employees;
  - Current Client Rates report (if permitted);
  - TimeTable report on all users;

Administrator possesses unlimited functionality permissions, which means changing, editing and viewing all sorts of application related information without restrictions.

Here is a complete list of Time-Assistant features – all available to the Administrator:

- ***Change application settings and default display settings;***
- ***Export data to QuickBooks;***
- ***Change the list of departments;***
- ***Change the list of Absence Types;***
- ***Add new Administrators to the application;***
- ***Change the list of User Levels;***
- ***Change the list of Pay Periods;***

AVAILABLE TO APPLICATION ADMINISTRATORS ONLY!

- View and edit Positions, Departments, Work Types, Projects, Clients, Tasks, Expenses, Currencies, etc.;
- Add new Managers and Employees and edit their properties, rates and timetables;

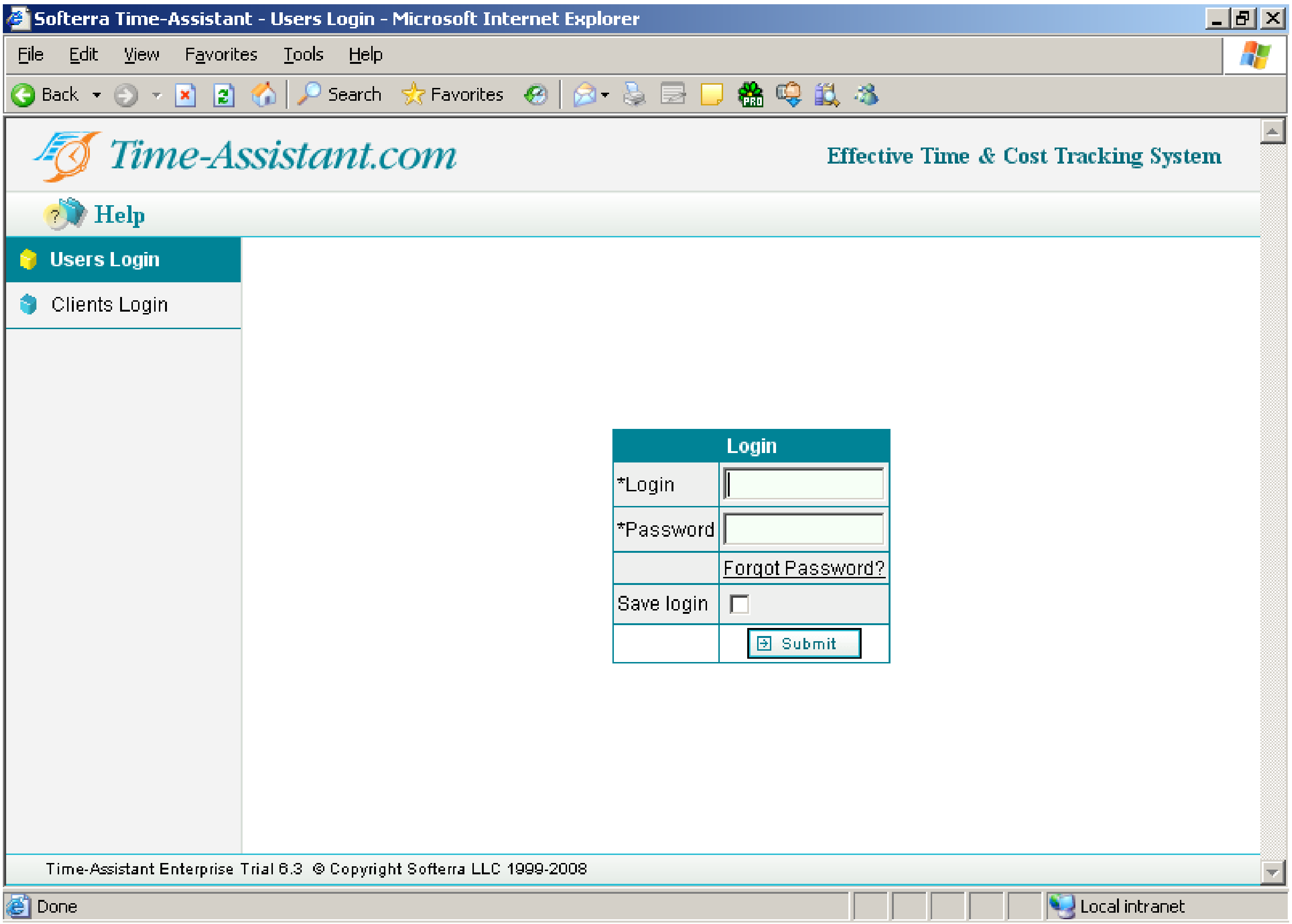
- Add, edit, delete timesheet records for all users;
- View and export TimeTracks for all users;
- Approve TimeTracks for all users;
- View approvals for all users;
- Edit absence days for all users;
- Assign/reset Holidays and Days Off for all users;
- View and change user status;
- Generate and export the following reports:
  - Timesheet Report for any number of Employees;
  - Timesheet Report for any number of Projects;
  - Work Type Report for any number of Employees;
  - Work Type Report for any number of Projects;
  - Summary Report for any Employee;
  - Employees Involved in Projects Report for any number of users;
  - Manager Subordinate Employees report for any number of Managers;
  - Current User Rates Report by Departments;
  - Current Client Rates;
  - Estimates for all Projects;
  - Salary Report by Departments;
  - Client Invoices;
  - TimeTable Report for any number of users;
  - View and change user profile and display settings;

Using Time-Assistant (How Do I…?)

How Do I Log on to the Application?

Login page

The Login page is the first page a user will see as he/she starts working with the application. This page allows users to enter their login names and passwords required for authorization.



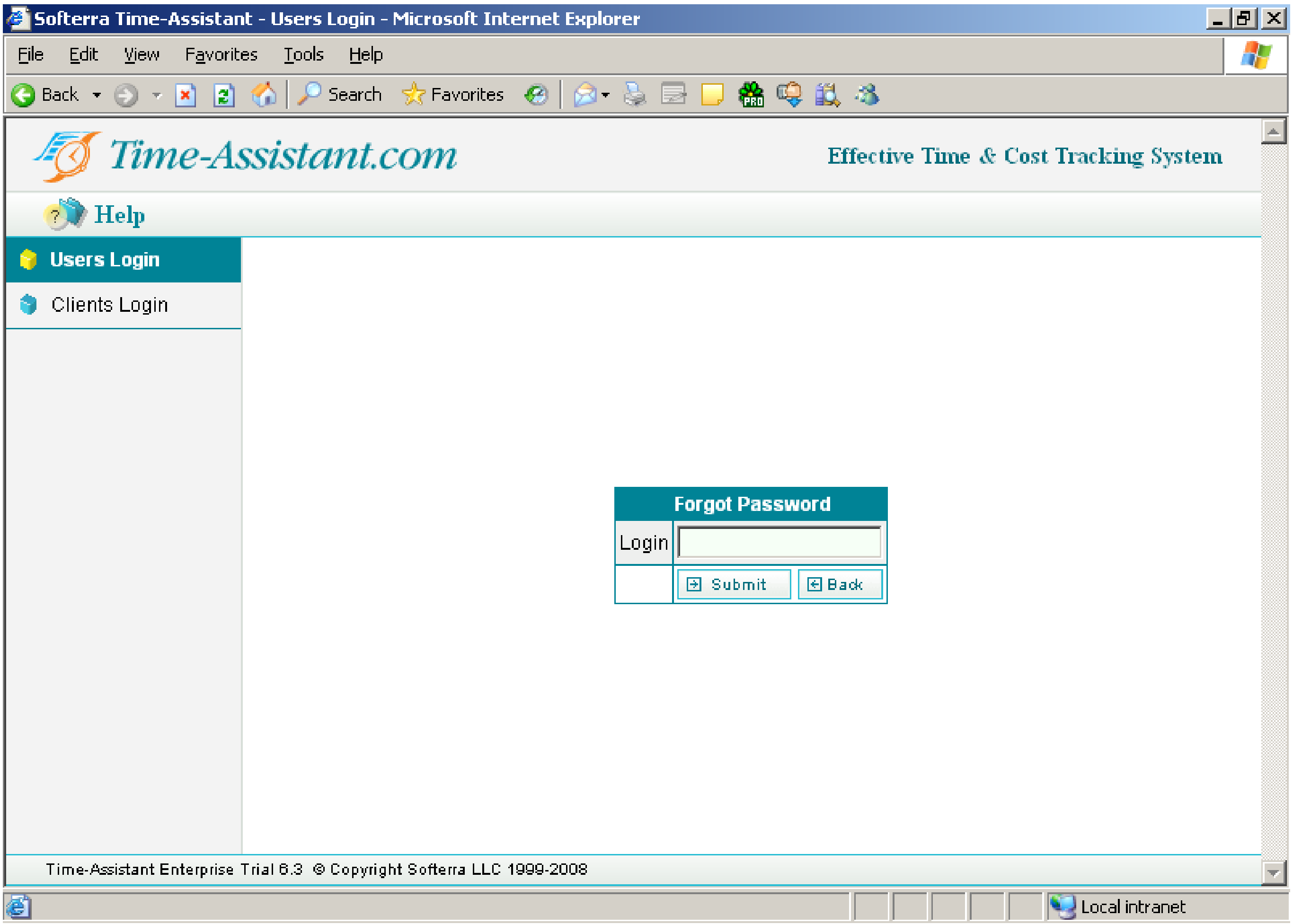
When attempting to access the application for the first time, you will, as an application Administrator, be offered a default login and password, being ‘admin – admin’. You may change them right away if you so wish, going to the Profile section.

Upon successful authorization, any user will get access to the application functionality starting from the Timesheet section. It is possible to choose an alternative starting page using the Profile section.

Finally, in order to avoid multiple username type-ins in the future, one may check the ‘Save login’ box.

How Do I Access the Application if I Forget My Password?

If one forgets a password, it is recommended to click the 'Forgot Your Password?' link on the Login page in order to be redirected to the 'Forgot Your Password?' page.



To have the application generate a new password so to eventually receive it via email, one will first have to give a correct answer to a secret question (for more details, see the ‘Profile’ section).

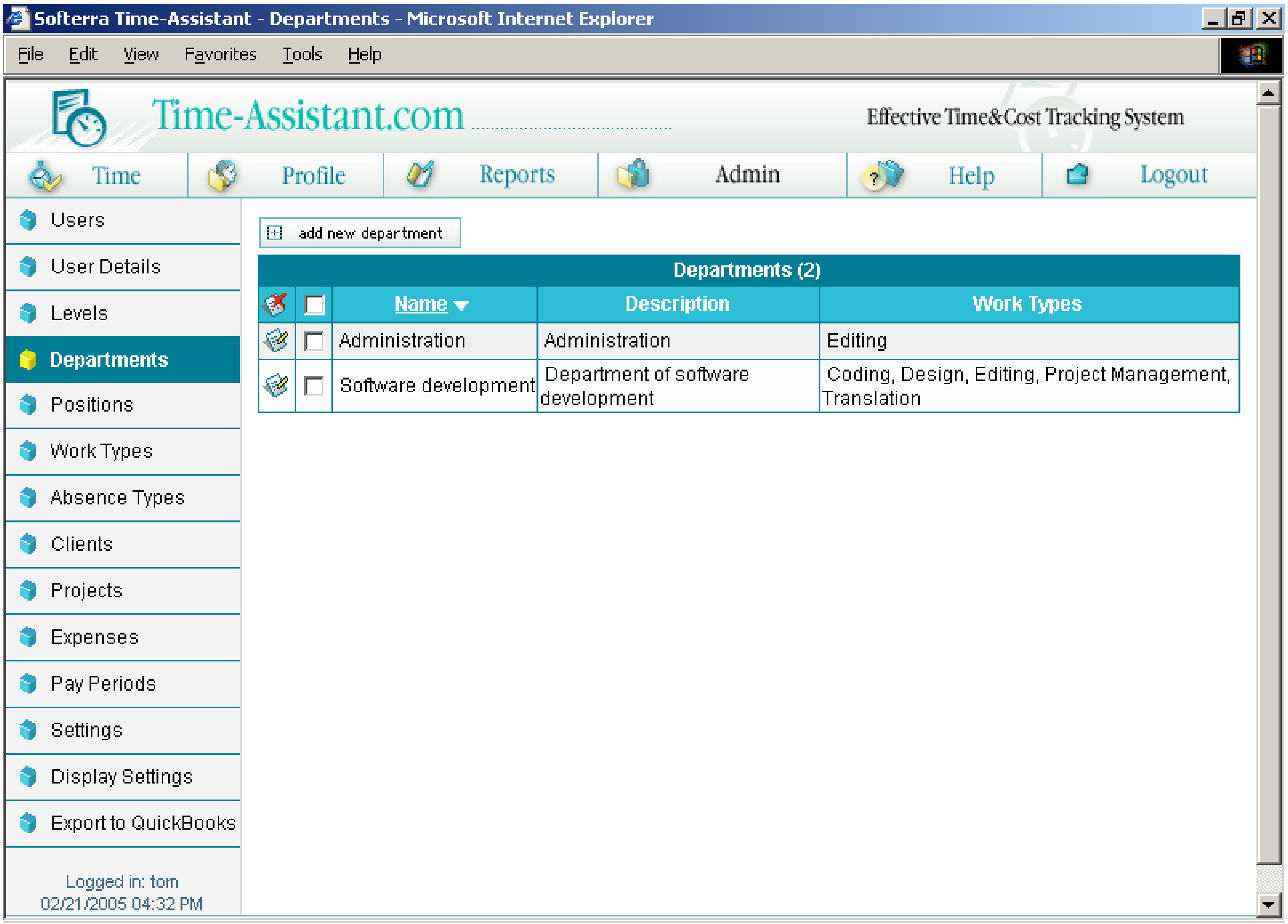
Logout

After a user finishes work, it is recommended he do a logout, but not necessarily. The logout feature guarantees that the session will be successfully closed, session variables - destroyed and there won't be any security problems.

In order to log out, just click the Logout menu button.

How Do I Operate Departments?

Clicking the Departments button on the left-hand side navigation panel in the Admin menu, users get to the page featuring the list of Departments (if any at that moment). It is only Administrators who are authorized to manage Departments. As to Managers and Employees, they are only allowed to see a view-only page with just the sorting feature available.

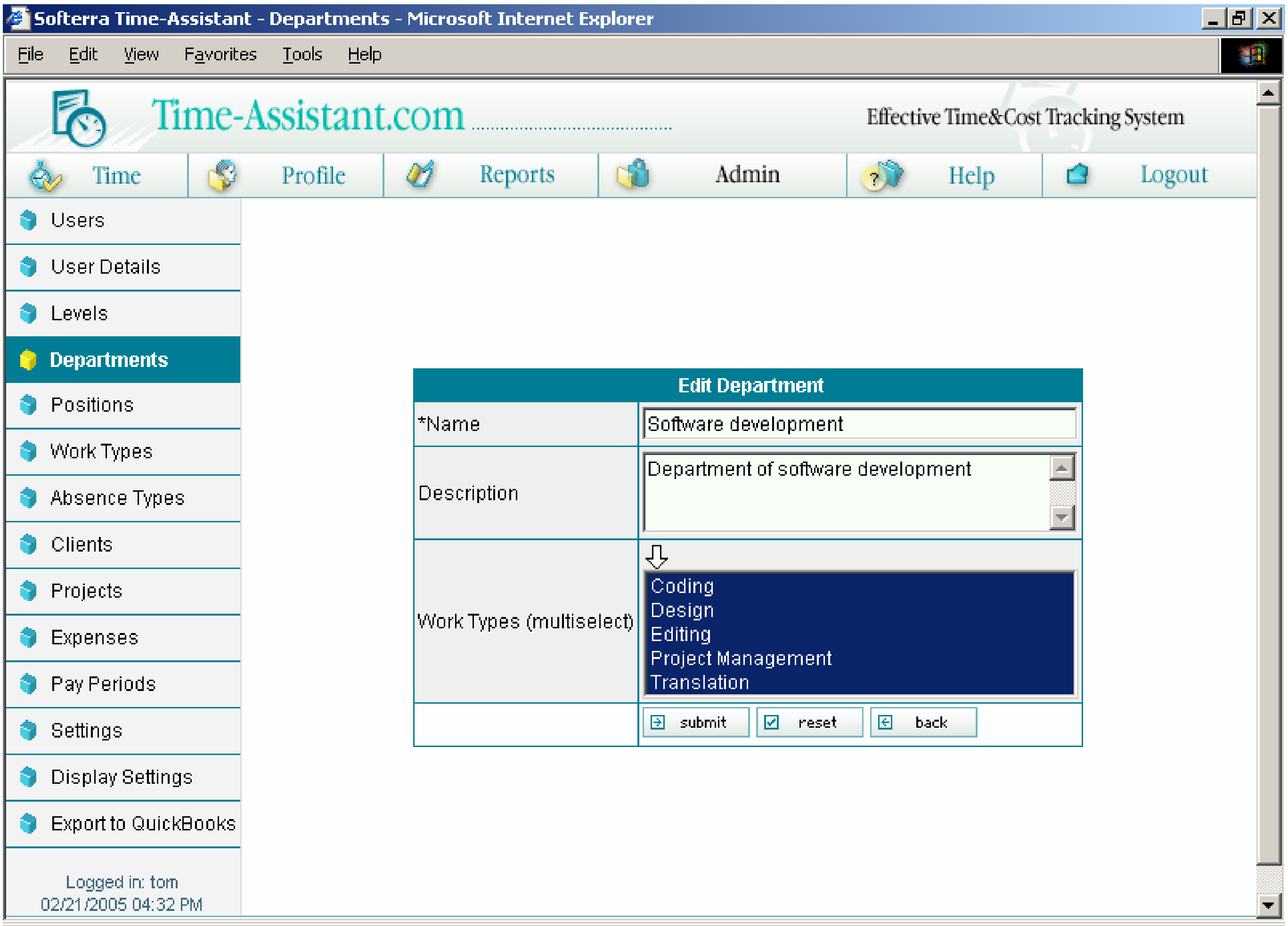


To sort Departments by name in ascending/descending order alphabetically, click the Departments title.

To delete a Department, tick a box next to it and press Delete.

To add a Department, click the Add New Department button.

To edit a Department, just click the Edit icon to the left of the Department's name.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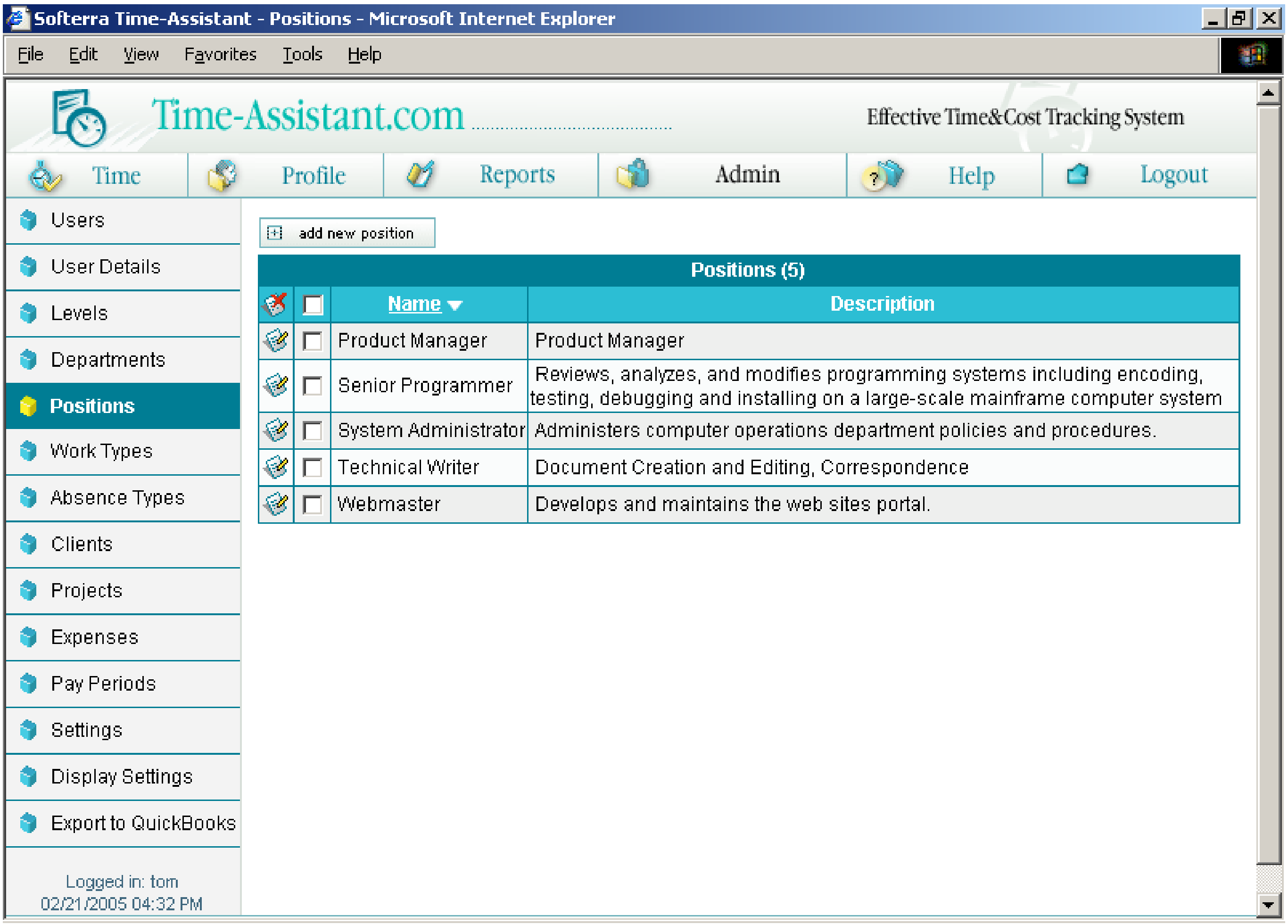
File Edit View Favorites Tools Help
Time-Assistant.com
Effective Time&Cost Tracking System
Time Profile Reports Admin Help Logout
Users
User Details
Levels
Departments
Positions
Work Types
Absence Types
Clients
Projects
Expenses
Pay Periods
Settings
Display Settings
Export to QuickBooks
Logged in: tom
02/21/2005 04:32 PM
Edit Department
*Name
Software development
Description
Department of software development
Work Types (multiselect)
Coding
Design
Editing
Project Management
Translation
submit
reset
back

How Do I Handle Positions?

User Positions may be enabled, disabled or preset in the Application Settings as an optional feature. Clicking the Positions button on the left-hand side navigation panel in the Admin menu takes you to a page containing the list of Positions (if any at that moment). Administrators and Managers are authorized to manage Positions, while Employees can only see a view-only page with just the sorting feature enabled.

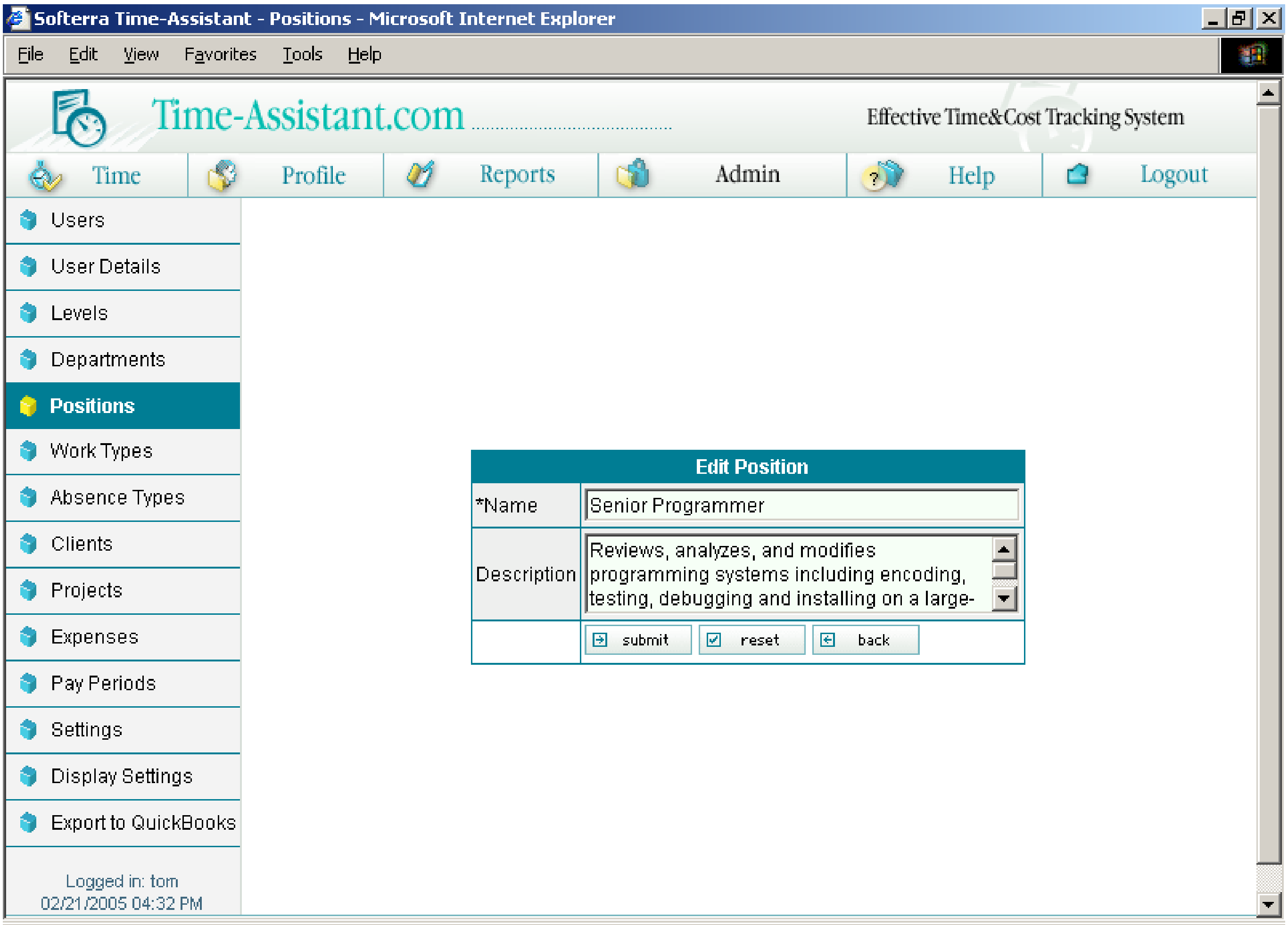


To sort Positions in ascending/descending order alphabetically, click the Positions title.

To delete a Position, tick a box next to it and press Delete.

To add a Position, click Add New Position.

To edit a Position, just click the Edit icon to the left of its name in the list.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Time-Assistant.com
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Time
Profile
Reports
Admin
Help
Logout
Users
User Details
Levels
Departments
Positions
Work Types
Absence Types
Clients
Projects
Expenses
Pay Periods
Settings
Display Settings
Export to QuickBooks
Logged in: tom
02/21/2005 04:32 PM
Edit Position
*Name
Senior Programmer
Description
Reviews, analyzes, and modifies programming systems including encoding, testing, debugging and installing on a large-
submit
reset
back

How Do I Manage User Levels?

All Time-Assistant users may be divided into three main user categories: Application Administrators, Managers (in the Enterprise version) and Employees. Each category determines the rights of Time-Assistant users belonging to this category.

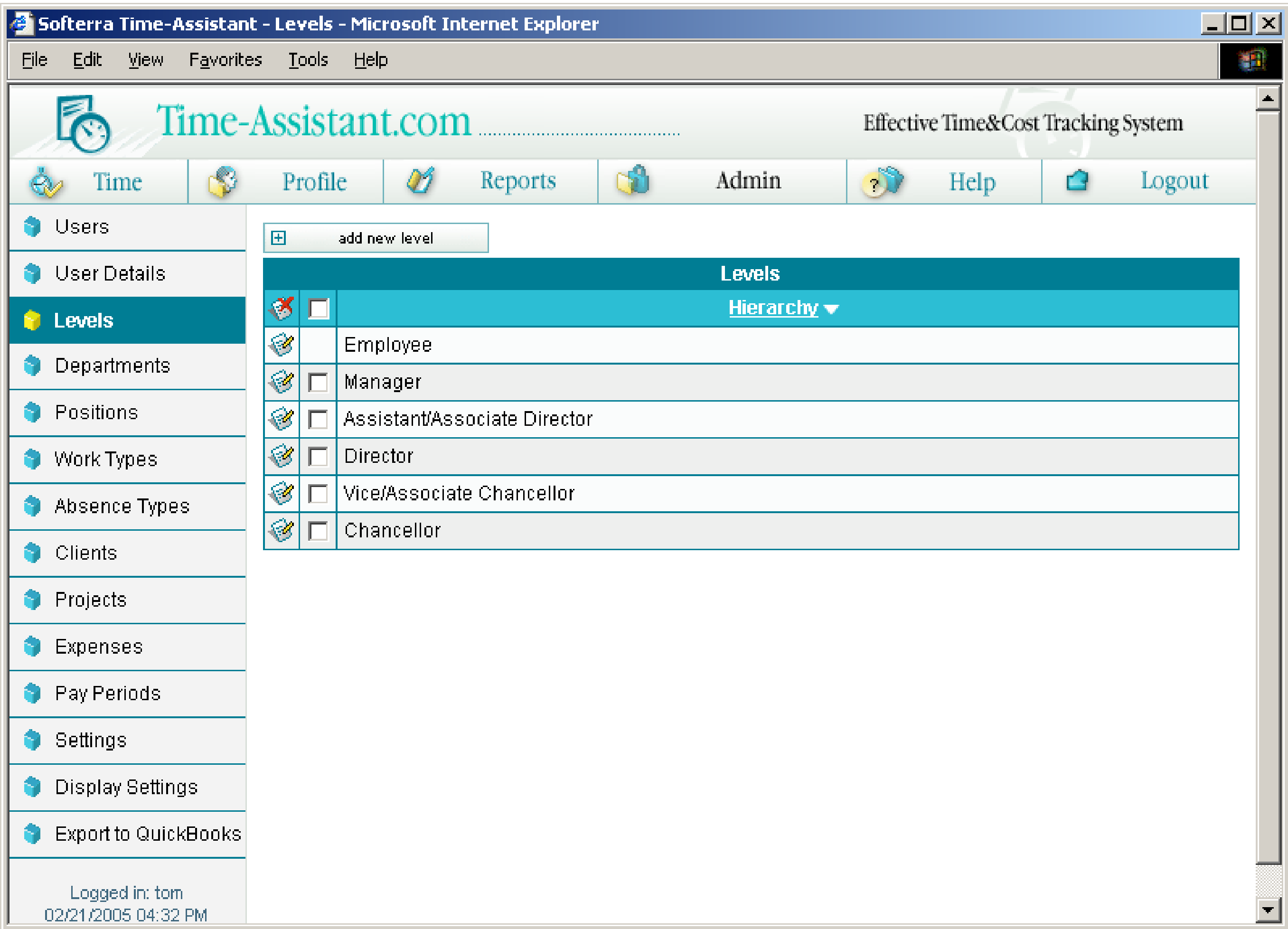
Clicking the Levels button on the left-hand side navigation panel in the Admin menu, one gets to a page featuring the list of User Levels.

It is only the Administrator who's authorized to manage User Levels. As to Employees and Managers, they will just see a view-only page with only the sorting feature enabled.

Administrator and Employee Levels can't be deleted, with the latter not to be edited either.

In the Enterprise version, Administrators can add any number of Manager Levels.

Manager Levels represent a hierarchical structure where every newly created level automatically becomes superior over the ones already existing (if any). In turn, a Manager is an administrator over a certain group of users, which consists of subordinate Employees along with lower-level Managers.

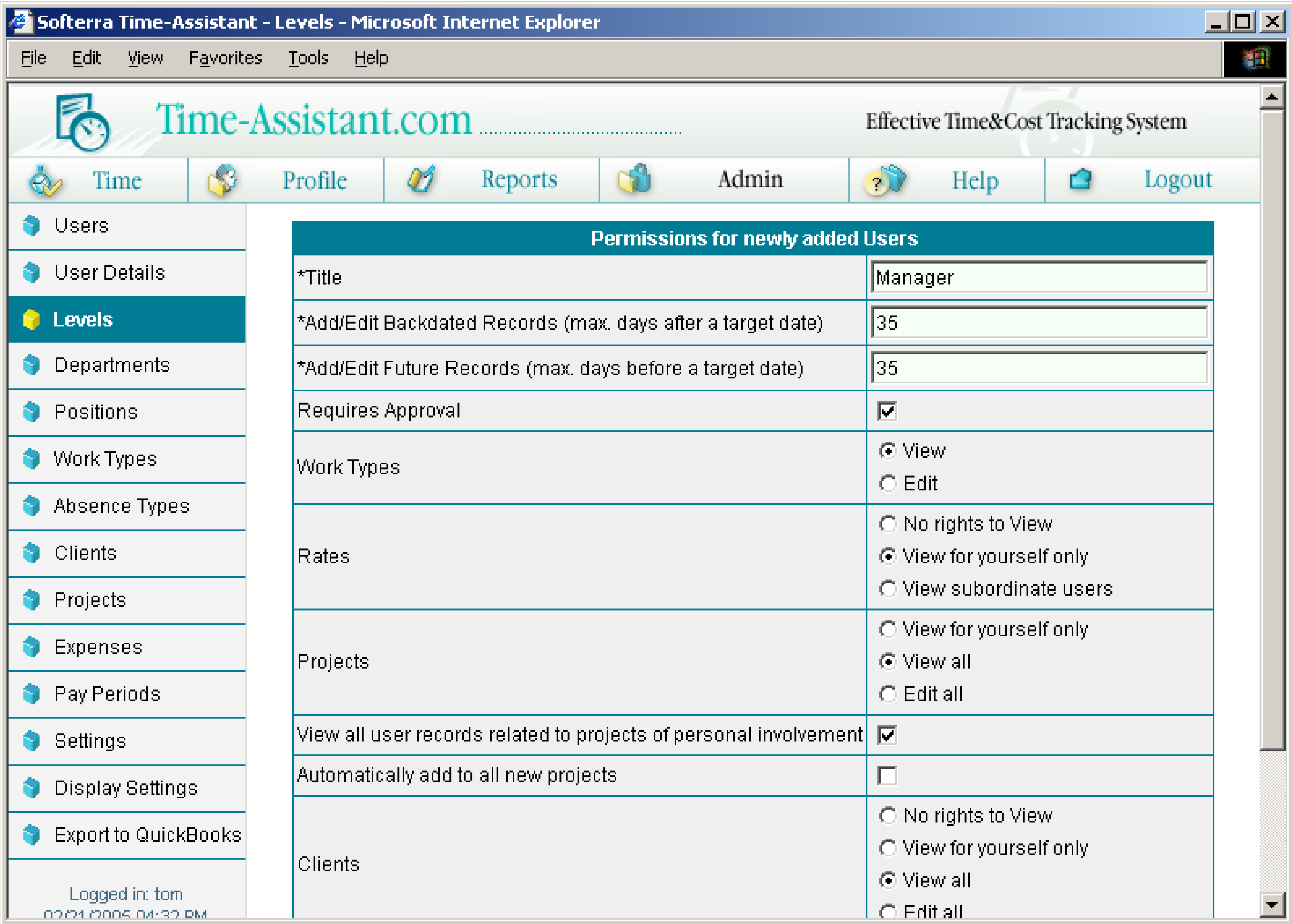


To sort Manager Levels in ascending/descending order alphabetically, click the Hierarchy link located in the title row.

To delete a Manager Level, tick a box next to it and press Delete.

To add a Manager Level, click the Add New Level button.

To edit a Manager Level, just click the Edit icon to the left of its name in the list. Clicking Edit will display the following screen:



On this page, one is offered to enter a Level name and set properties to eventually become the parameters by default when it comes to adding new users to this Level. These properties are the following:

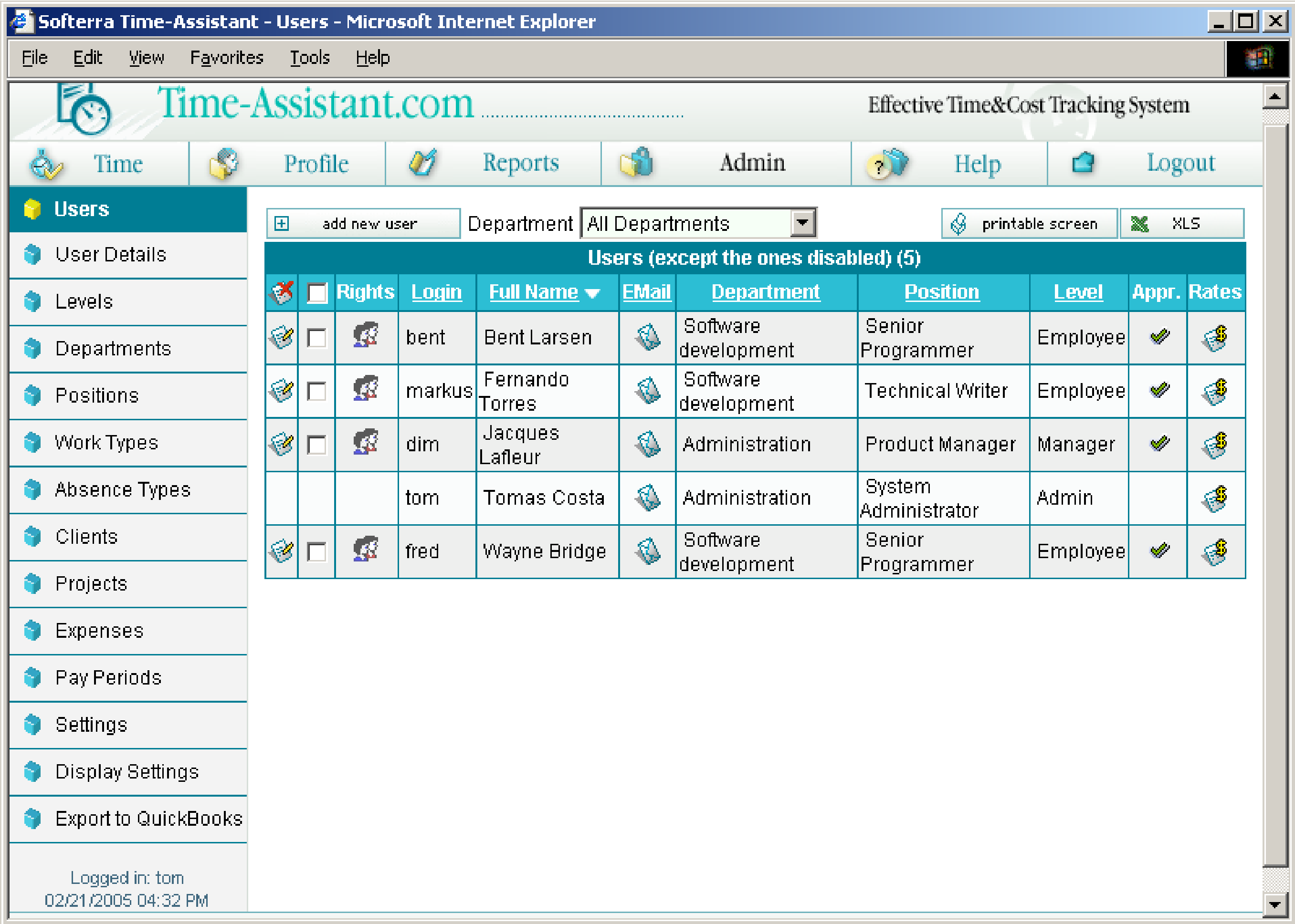
- Time limit for a newly added user to add/edit backdated records (in max. days after a target date);
- Time limit for a newly added user to add/edit future records (in max. days before a target date);
- A setting on whether or not a new user will require Timetrack approval;
- A setting on whether or not a new user will automatically be further added to every newly created project;
- A setting on whether or not a new user will be allowed to view all user records related to projects of his/her personal involvement;

- New user permission settings as to viewing or editing projects, clients, expenses and work types.

How Do I Manage Users?

Managing Users

To access the list of Time-Assistant users, one should click the Users button on the left-hand side navigation panel in the Admin menu. Having done so, Administrators and Managers will see the following page displayed:



The list will contain the following information:

- Login
- Full Name
- Email
- Department
- Position (if enabled)
- Level
- ‘Requires Approval’ status (in the Enterprise version, for Employees and Managers only).

Sorting users in ascending/descending order alphabetical order by one of their selected properties (‘Login’, ‘Name’, ‘Email’, ‘Department’, ‘Position’, etc) is done via clicking a respective link located in the table title row.

To export the list of users to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

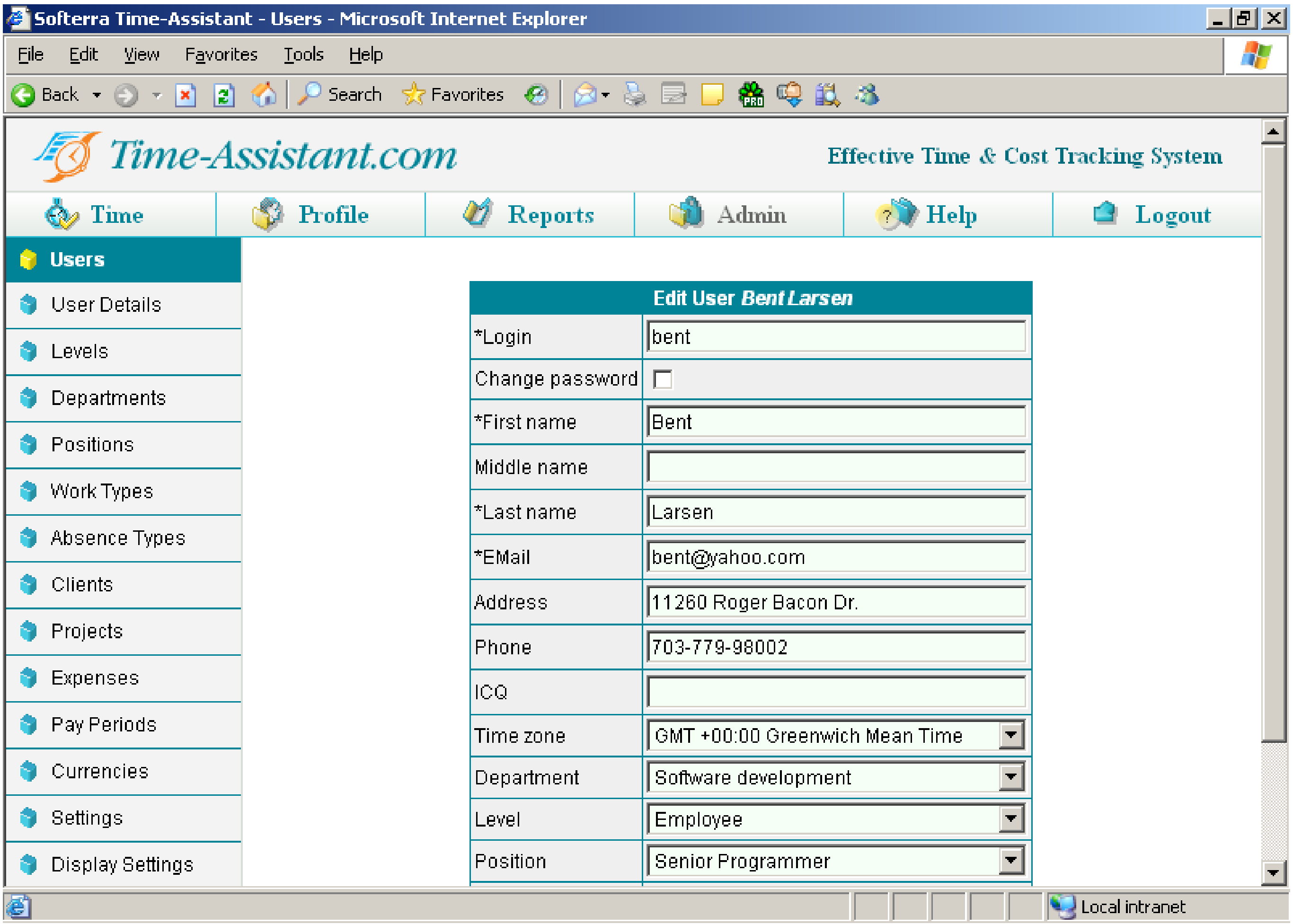
To view a user’s Work Type Rate, an Administrator or Manager should click on Rates icon in a corresponding user table row. Note that Managers will have access to these links only provided that either they PERSONALLY, or any of their SUBORDINATE Employees/Managers are related to those rates.

To delete a user, tick a box next to the user name and press Delete. Note that Managers are only allowed to delete their SUBORDINATE Employees and Managers!

To add a new user, click the ADD NEW USER button.

To edit an existing user, click the Edit icon located in the same row on the left. (Note that Managers are only allowed to edit themselves or any of their SUBORDINATE Employees/Managers).

Clicking Edit will display the following screen:



Using this page, an Administrator or Manager can add or edit all sorts of user related information.

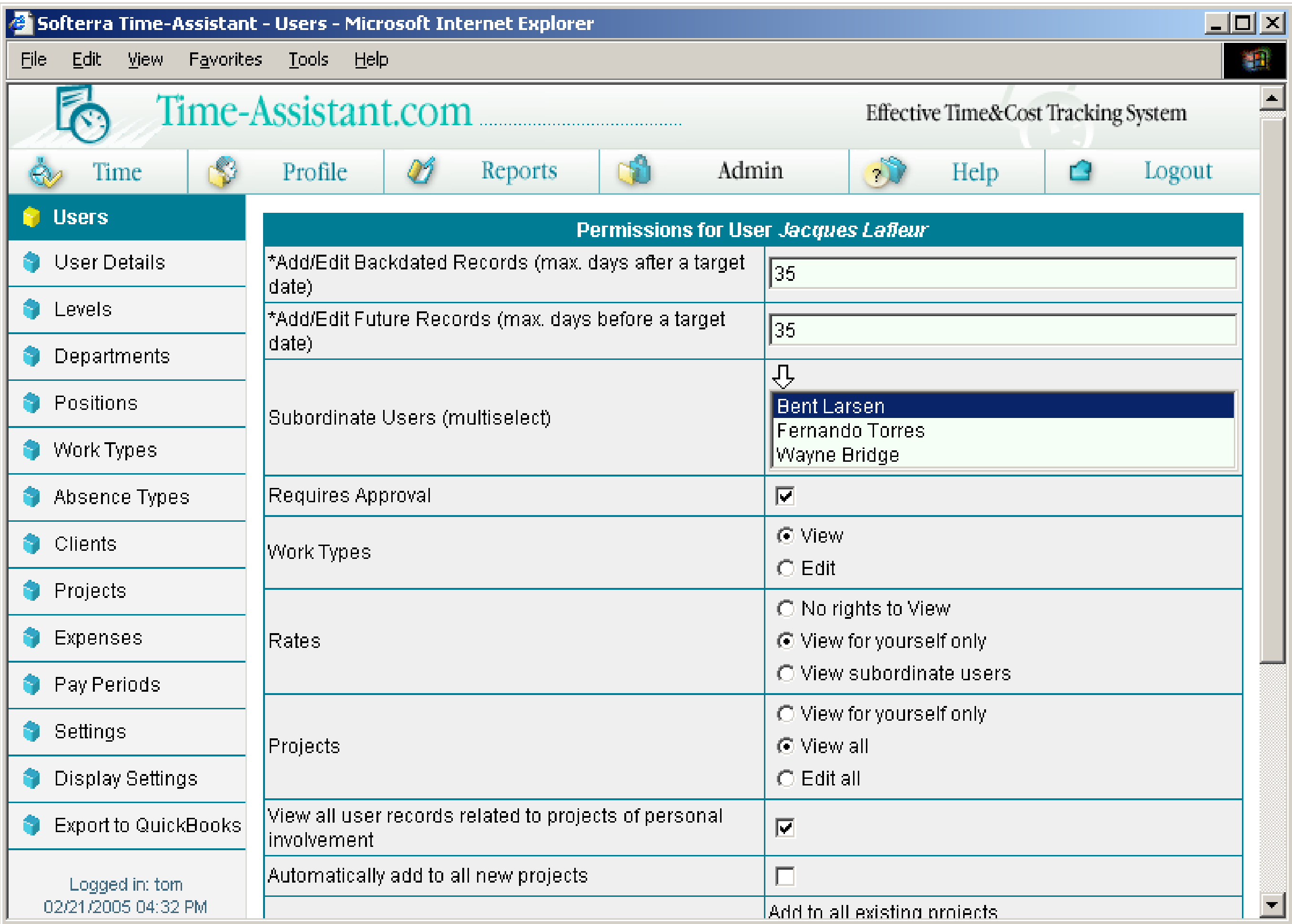
They are also authorized to set a Disabled status to deprive unwanted users of their access rights.

Administrators are authorized to assign any User Levels; while Managers may only assign Employees and lower-level Managers.

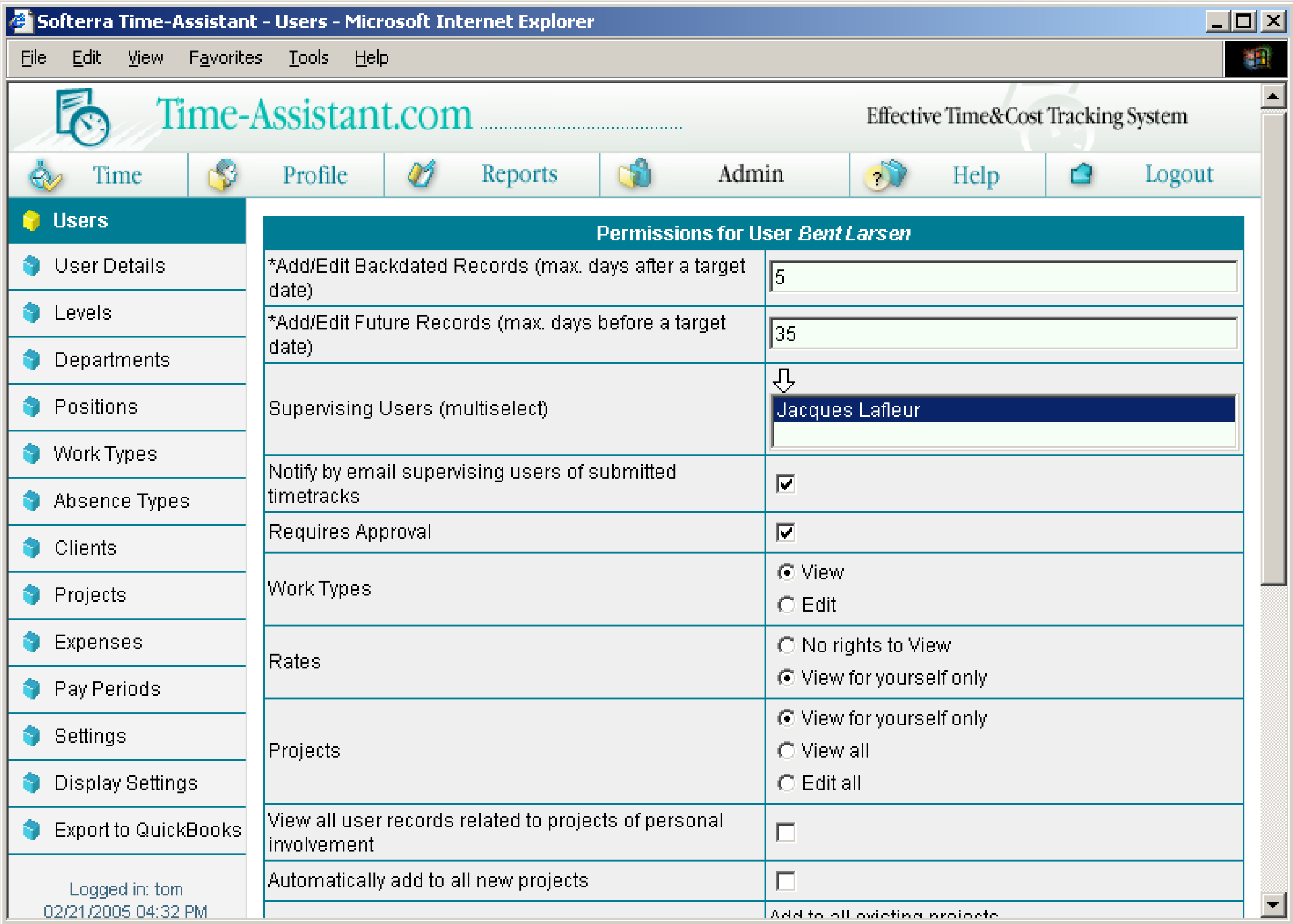
Using the 'Change Password' link, Administrators or Managers can reset existing user passwords.

To edit Employee or Manager permissions, click the click the Permissions icon located in a corresponding table row. Note that Managers may only edit themselves or any of their SUBORDINATE Employees and Managers.

Here is the screen to be displayed to Managers:



Here is how the same page will be displayed for Employees:



Using this page, Administrators and Managers can add or edit all sorts of user related information, namely:

Regarding Managers and Employees:

- Time limit for a newly added user to add/edit backdated records (in max. days after a target date);
- Time limit for a newly added user to add/edit future records (in max. days before a target date);
- A setting on whether or not a new user will require Timetrack approval;
- A setting on whether or not a new user will be allowed to view all user records related to projects of his/her personal involvement;
- New user permission settings as to viewing or editing projects, clients, expenses and work types.

Regarding Managers only:

- Appoint their supervising Managers;
- Appoint their subordinate Employees.

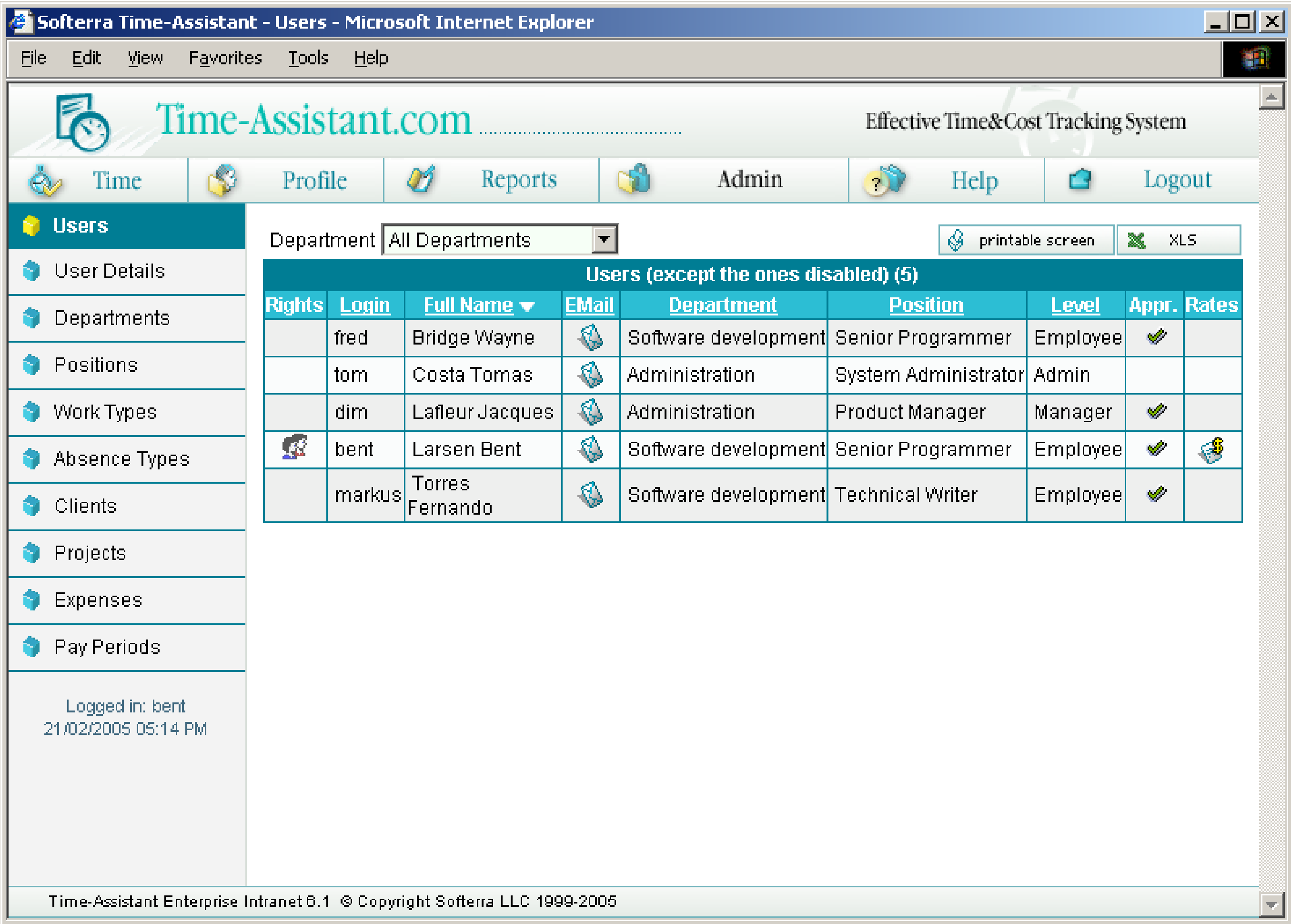
Regarding Employees only:

- Appoint their supervising Managers;
- Appoint Employees whose Timetracks are available for viewing by other authorized Employees;
- Authorize selected Employees to view Timetracks of other appointed Employees;

Administrators and Managers may also add/remove their SUBORDINATE users/managers to/from all or any of the existing projects by clicking a corresponding link.

List of Users (View-only)

Clicking the Users menu button by an Employee will display a view-only version of the List of Users:



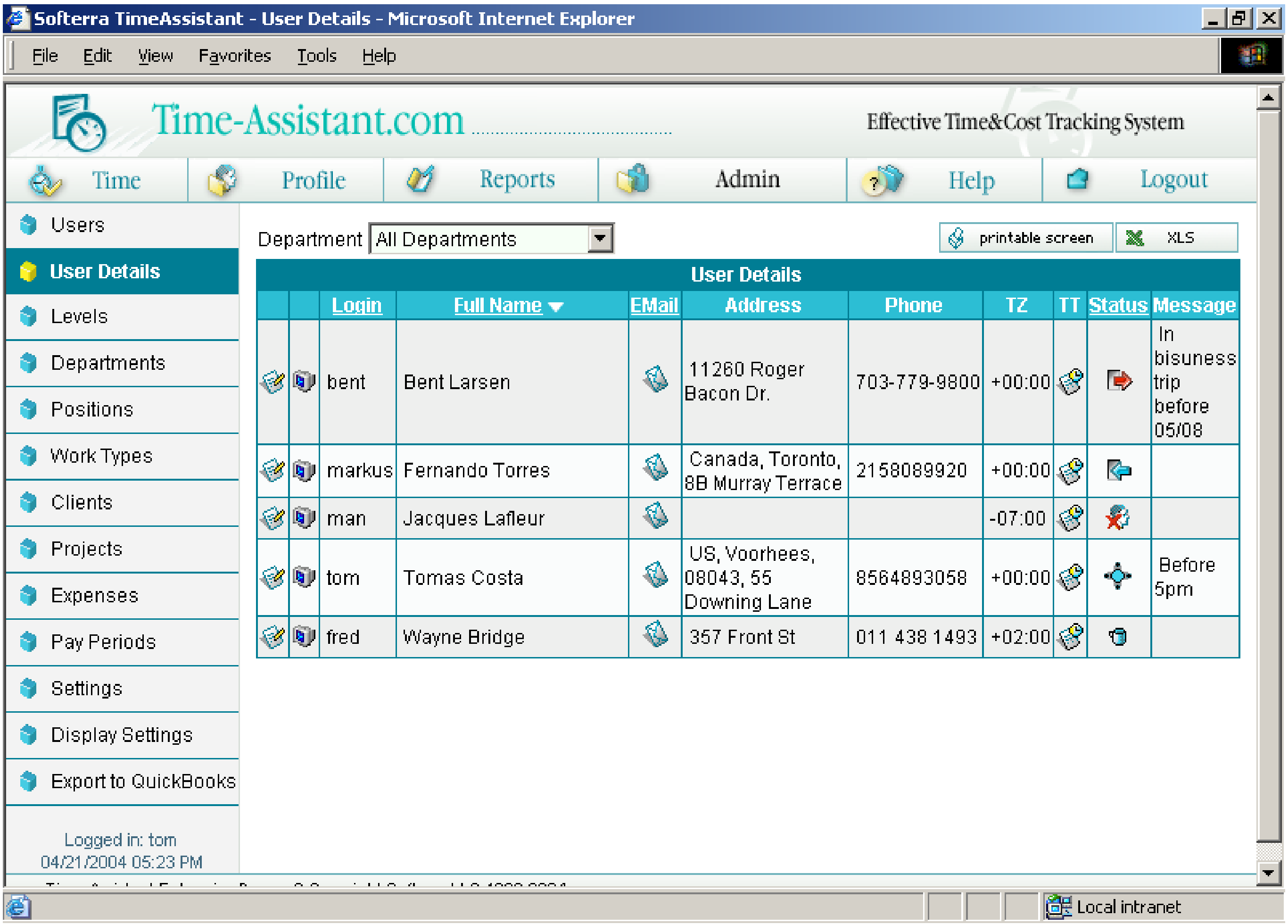
To view personal Work Type Rates, an Employee should click the Rates icon located in a target table row.

To view personal Permissions, click the Permissions in the same row.

How Do I View Advanced User Details?

User Details

To access the list of User Details, click the User Details button on the left-hand side navigation panel in the Admin menu. The following page will display:



The list will contain the following information:

- Login
- Full Name
- EMail
- Address
- Phone
- TimeZone
- Current Status - in, out, on lunch, on vacation, etc (if enabled)
- Message (Comments to Status) (if enabled)
- ICQ status (if enabled)

Here you may sort the users in ascending/descending alphabetical order by one of their selected properties (‘Login’, ‘Name’, ‘Email’, etc). This is done by clicking a target column name link.

It is the Administrators and Managers who are allowed to change the Display Settings for other users. NOTE that Managers may only change those for themselves or any of their Subordinate Employees or Managers.

To view a user’s TimeTable, one should click on the TimeTable icon in a corresponding user table row (if this feature is enabled).

The ICQ column features a current ICQ status for each user. In case ICQ isn’t being used inside your company or if the page is too slow to load, each user may disable the ICQ status display from his Display Settings page.

To export the list of users to an XLS file, click on a corresponding button in the upper right-hand corner of the screen.

User Status

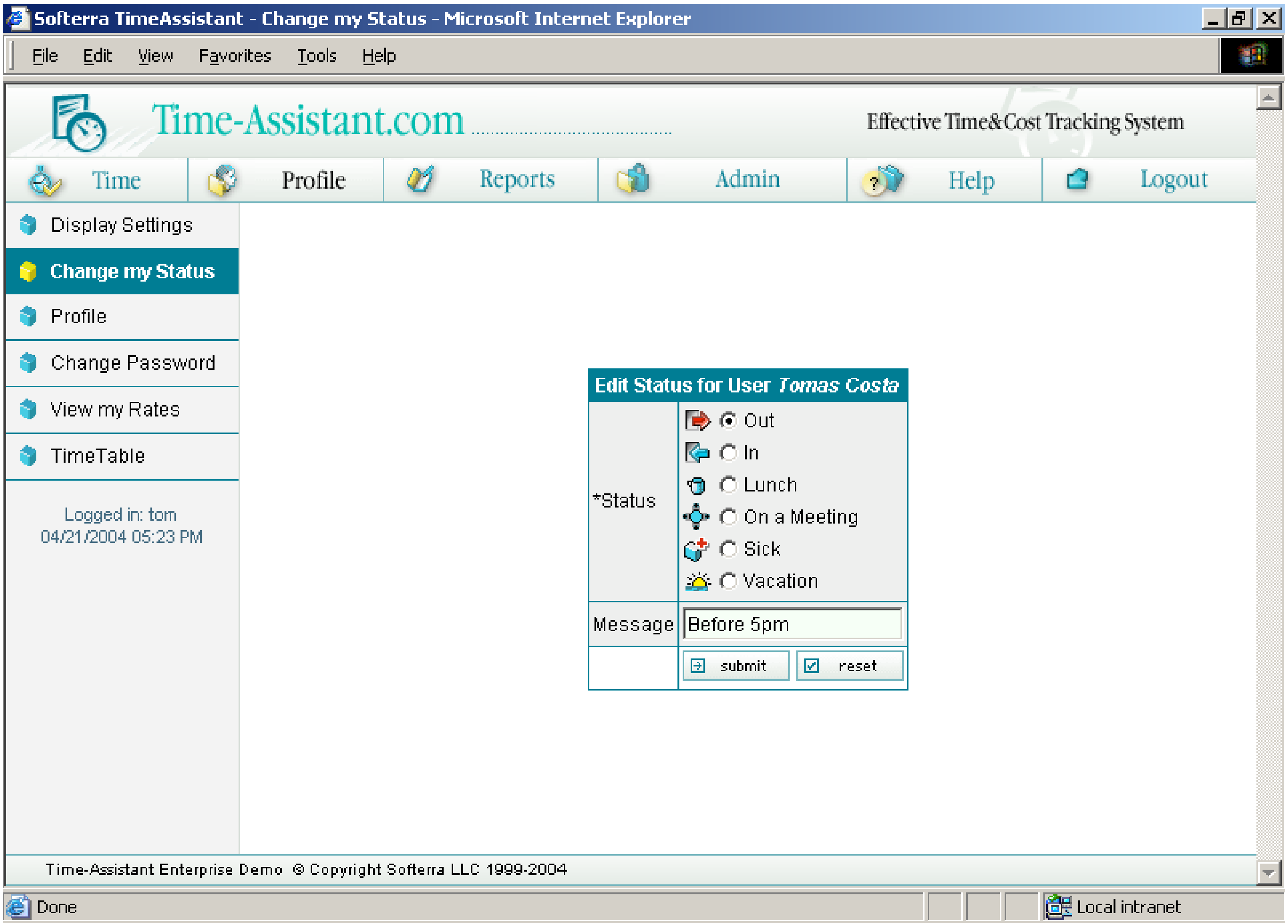
NOTE: This feature may be toggled from the Application settings.

The Status column features a current user status (in, out, on lunch, etc.) along with the user’s comments as to a current status.

Employees can change their status by clicking the Status icon in a target user list row, or the Change my Status button on the left-hand side navigation panel in the Profile menu.

Administrators and Managers are allowed to set Status for other users. Note that Managers may only set Status for themselves or any of their Subordinate Employees and Managers.

To change a current user status, click the Status icon in a target user list row on the left to display the following screen:



Use this page to set a current status along with a brief comment (if necessary).

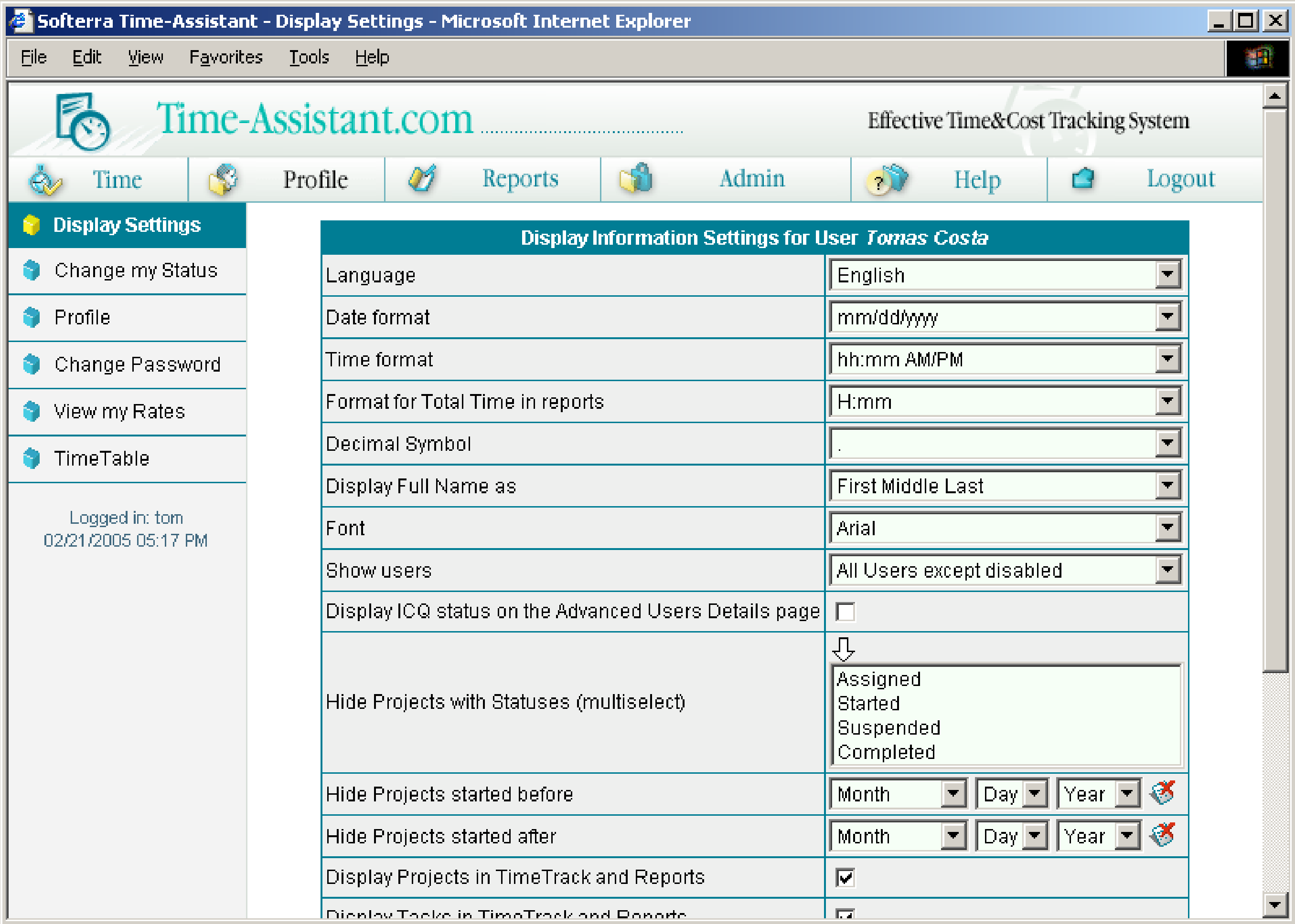
A Status may be one of the following:

- Out
- In
- Lunch
- On Meeting
- Sick
- Vacation

How Do I Change My Profile?

Display Settings

This feature is available for all Time-Assistant users regardless of their permissions. The Display Settings page is accessed via the Display Settings button on the left-hand side navigation panel in the Profile menu. Displayed you'll see the following page:



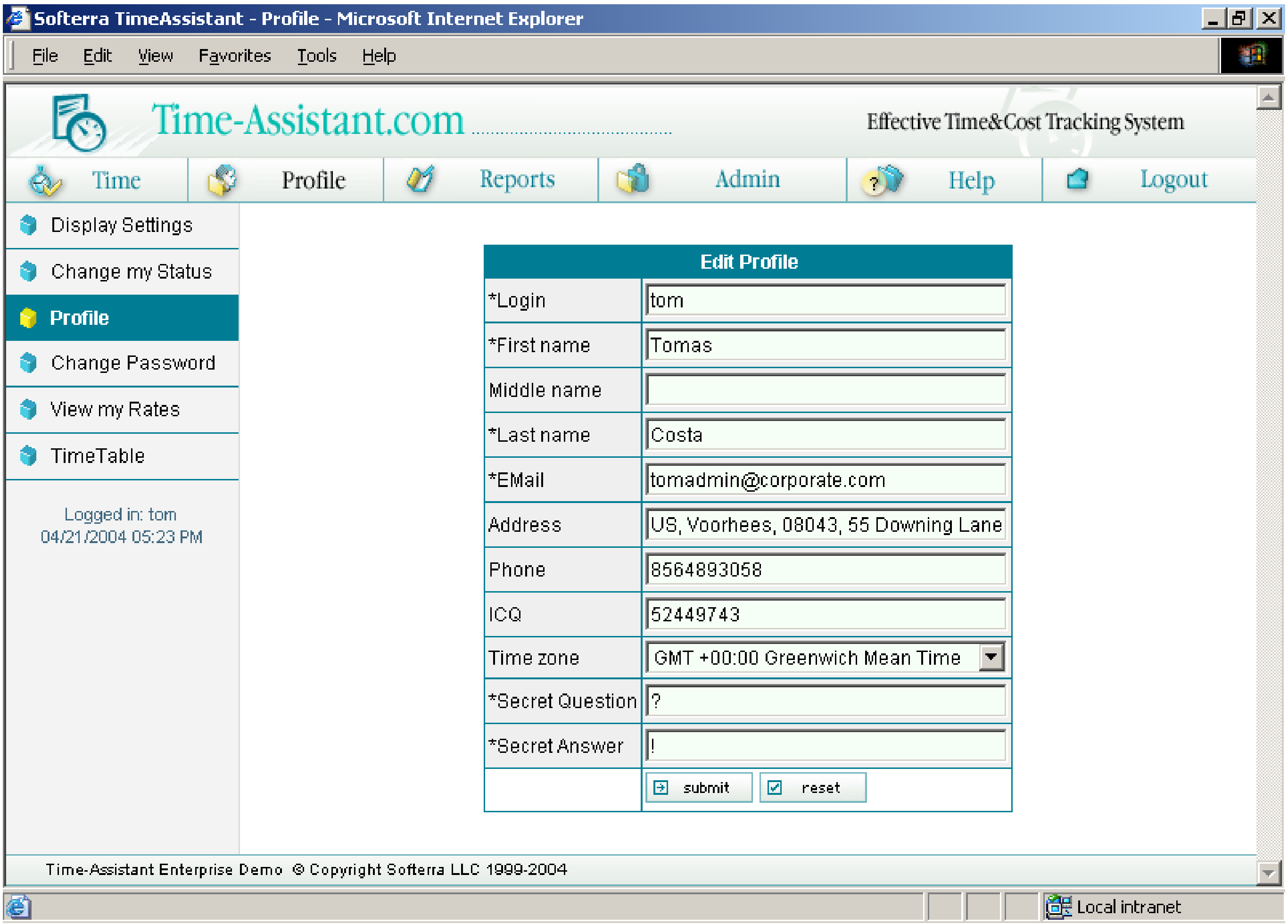
The page allows adjusting the following Display settings:

- Language
- Time and Date format
- Total Time format
- Decimal Symbol
- Full Name format
- Font
- User Filter

- Display ICQ
- Display Project ID's
- Display Tasks
- Project filters
- Calendar properties
- Start page

Editing Profile

This feature is available for all Time-Assistant users regardless of their permissions. The Edit profile page is accessed via the Profile button on the left-hand side navigation panel in the Profile menu. Displayed you'll see the following page:



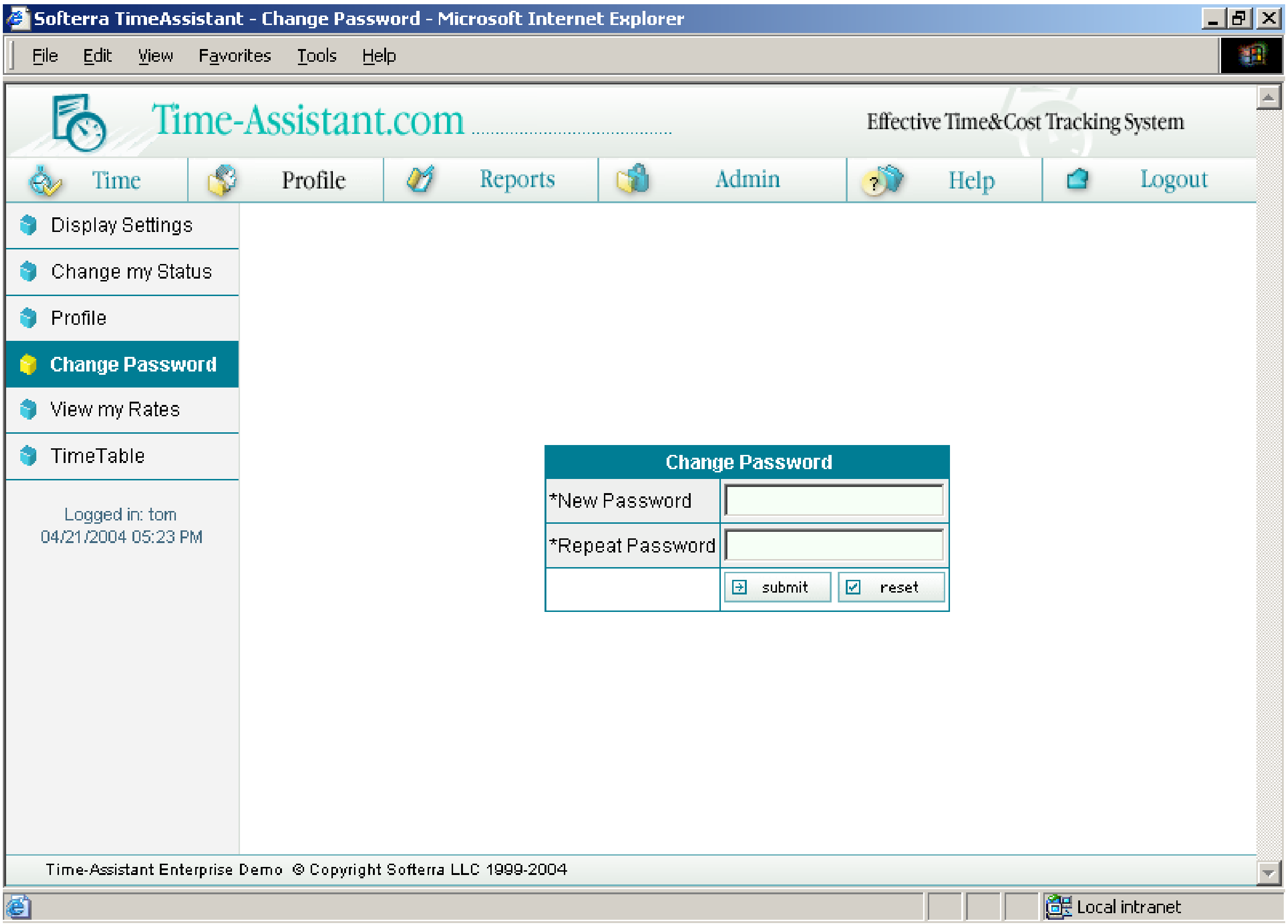
Here you'll be able to set and further edit your personal user settings. They are:

- Login
- Password

- First, Middle and Last Name
- Email address
- Postal address, phone
- ICQ number (if enabled)
- Secret Question and Answer for the 'Forgot Password' feature
- Time Zone

Changing Password

This feature is available for all Time-Assistant users regardless of their permissions. The Edit profile page is accessed via the Change Password button on the left-hand side navigation panel in the Profile menu. The resulting page will have the following look:

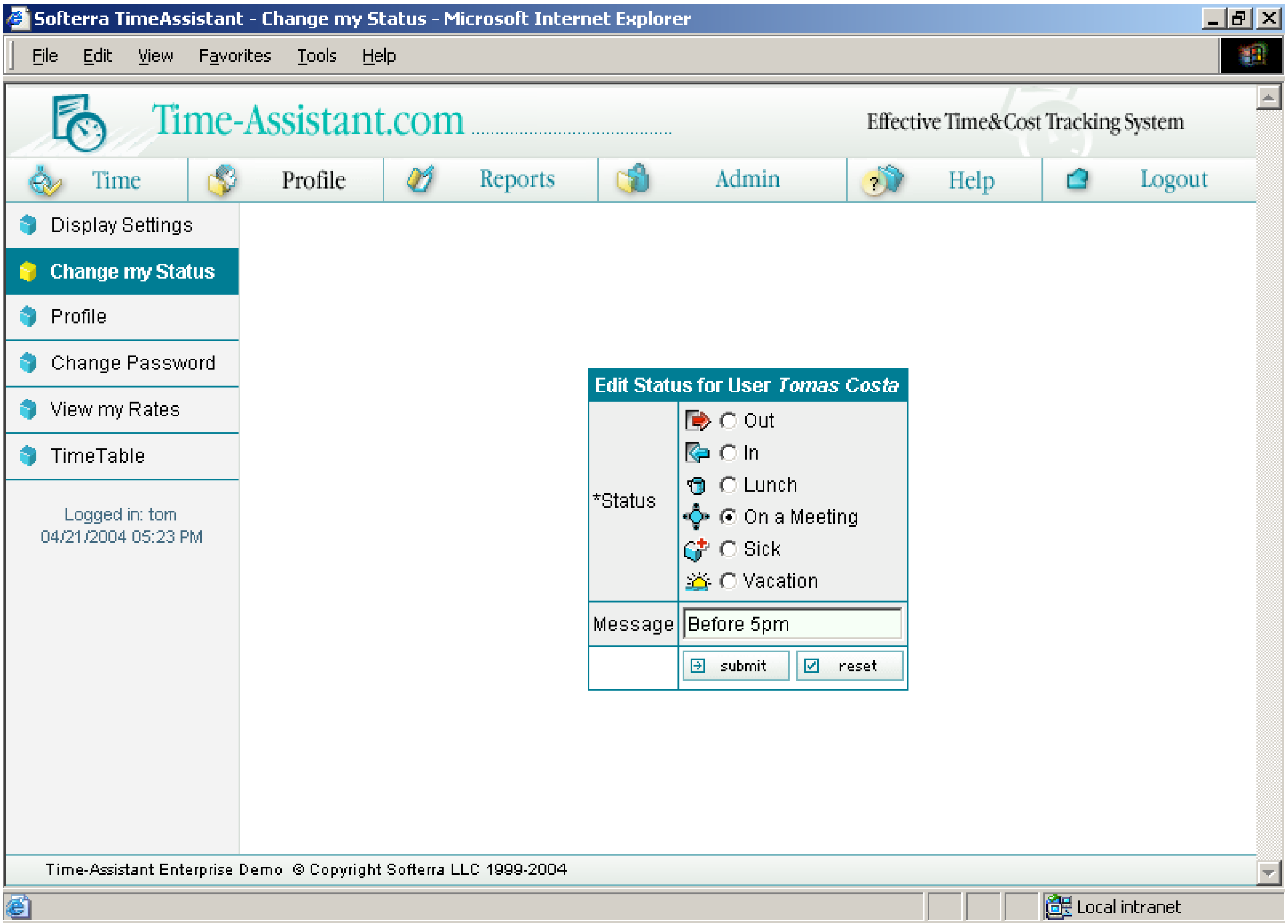


Changing Status

This feature can be toggled from the Application Settings.

The Status column features a current user status (in, out, on lunch, etc) along with the user's status-related comments.

To change the status, a user should click the Change My Status button in the left-hand side navigation panel in the Profile menu.



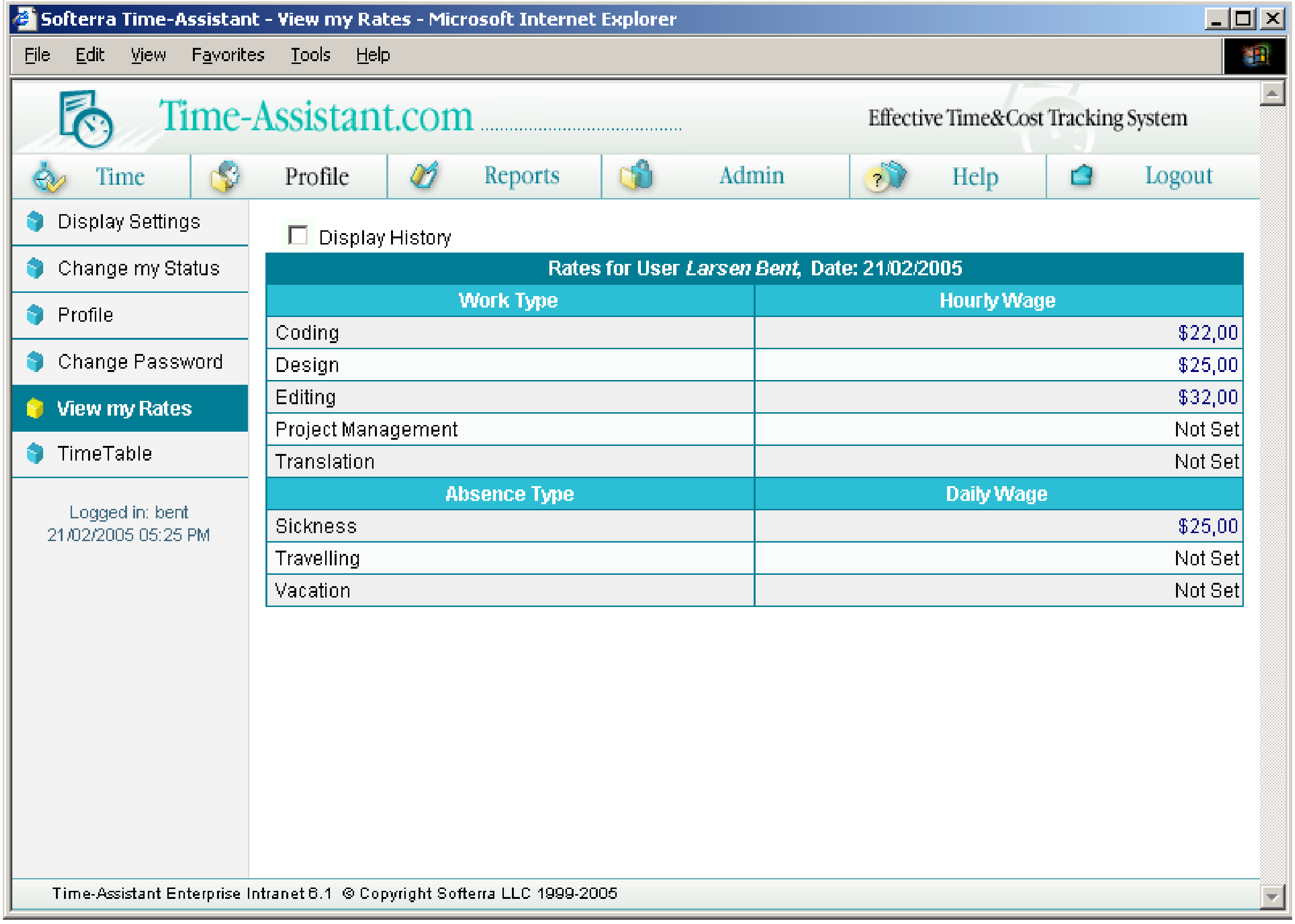
Use this page to set a current status and accompany it with an optional comment message (if necessary).

The Status may be one of the following:

- Out;
- In;
- Lunch;
- On Meeting;
- Sick;
- Vacation

Viewing Rates

All users can view their rates by clicking the View My Rates button on the left-hand side navigation panel in the Profile menu (if previously enabled by the Admin).



How Do I Fill My TimeTable?

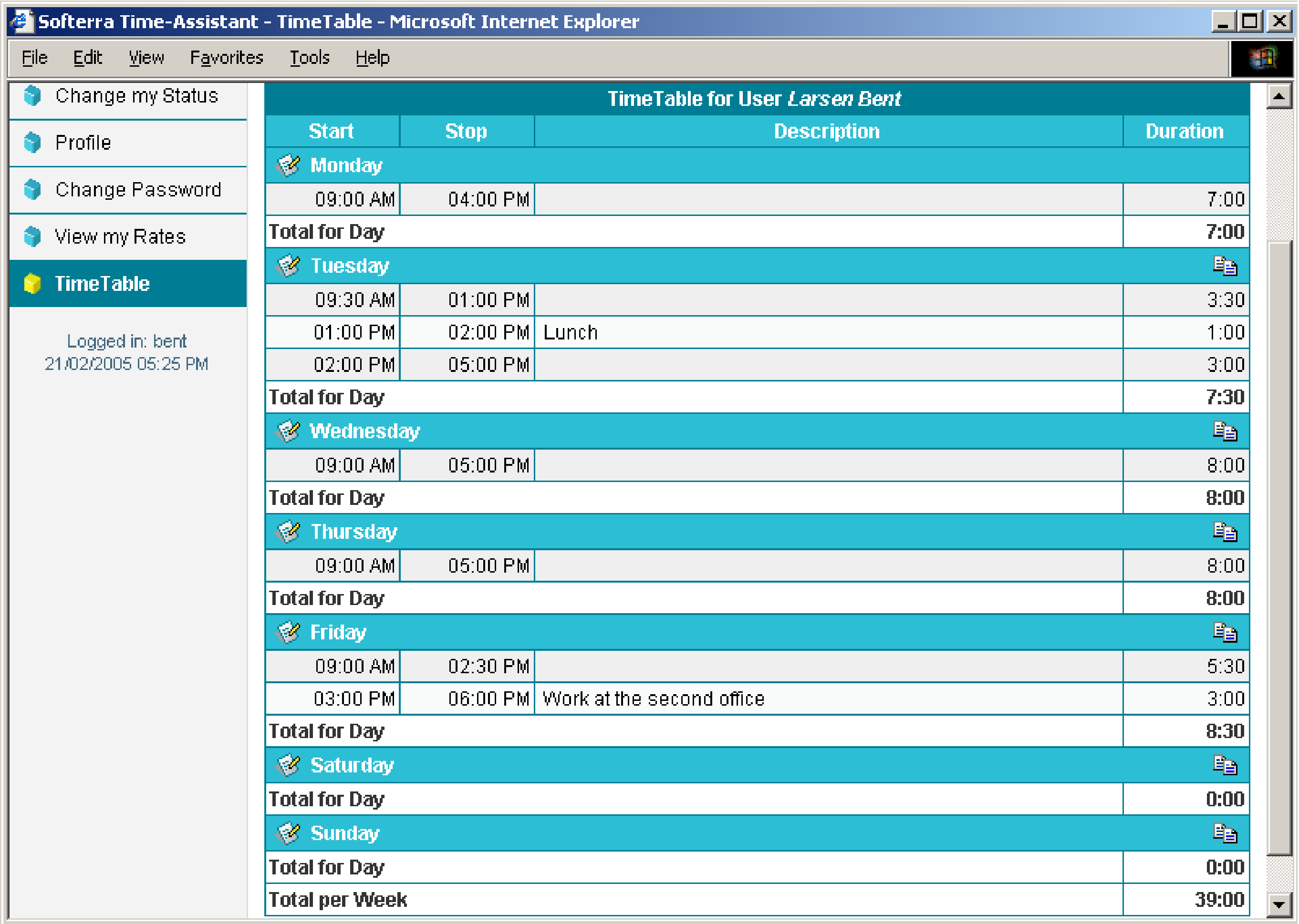
NOTE! This feature can be toggled from the Application Settings.

All application users are supposed to have their own daily routine, so by filling the TimeTable section they facilitate managerial work quite considerably.

NOTE! It is just the Administrator who is authorized to change a TimeTable for any user; while Managers may only change their PERSONAL TimeTable as well as those of their SUBORDINATE Employees and Managers. As to Employees, all they're allowed is just editing a TimeTable of their own.

Each user may view TimeTables of any other user.

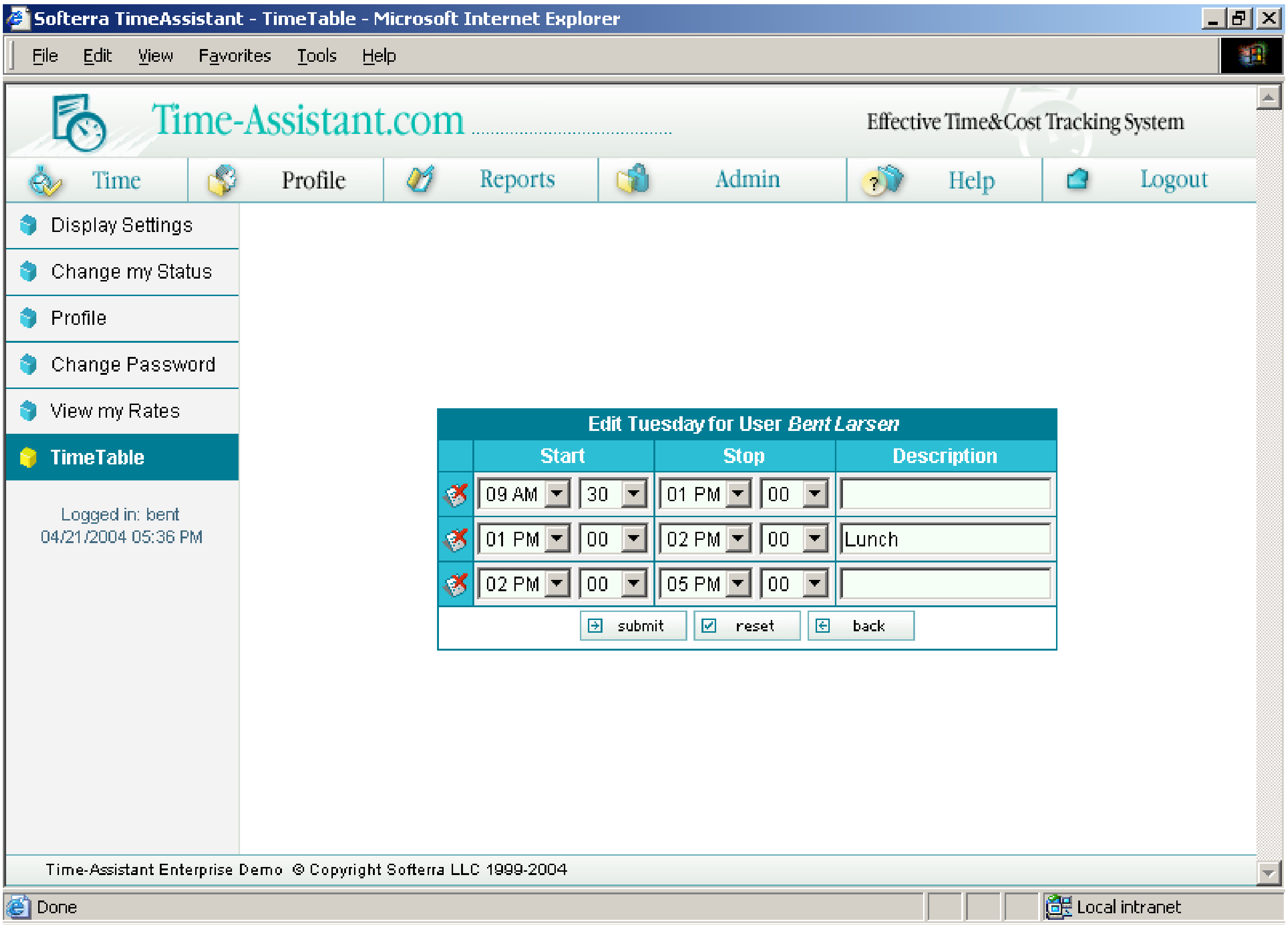
To view or change a particular TimeTable, go to the User Details page, then click the TimeTable icon in a target user table row. Clicking the icon will display the following page:



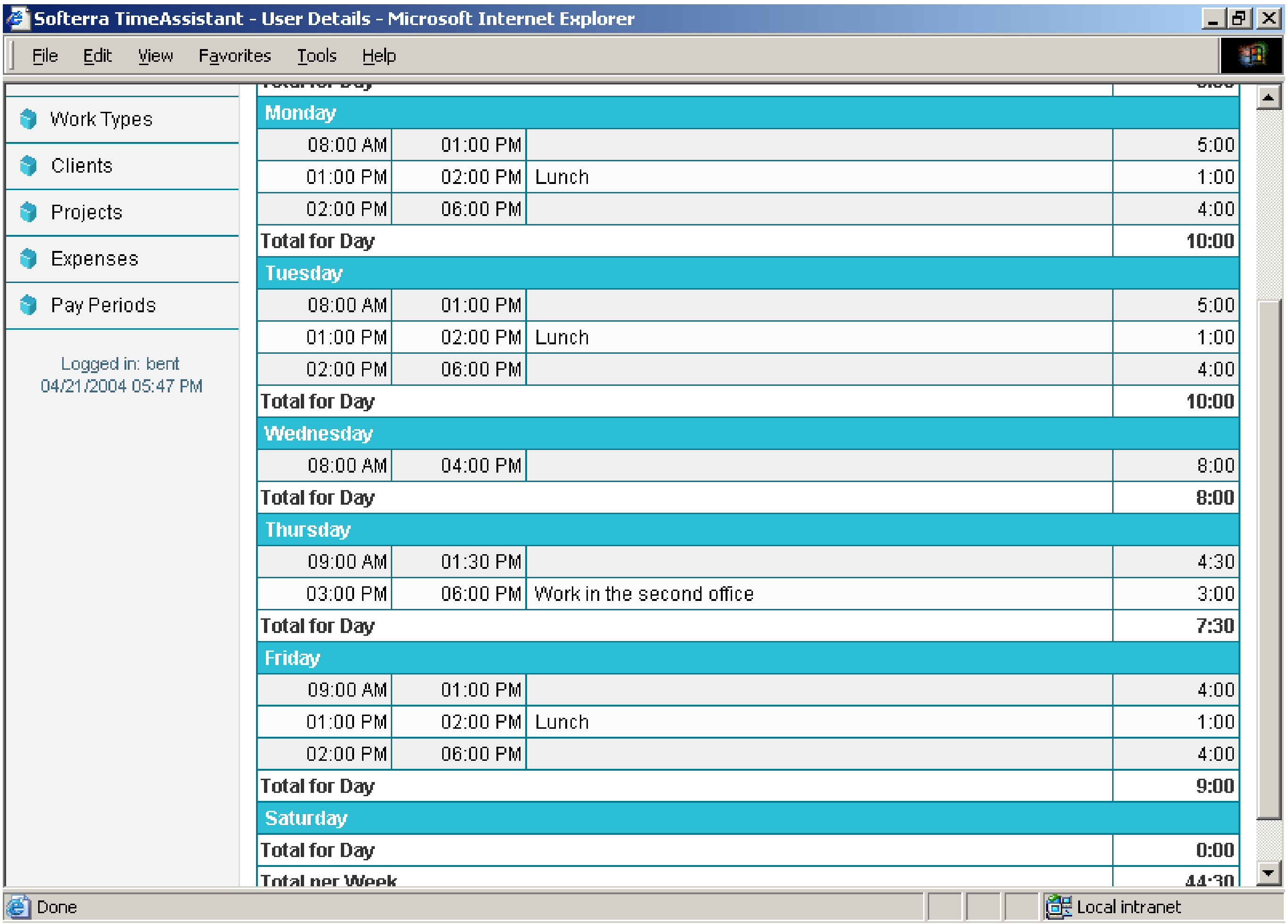
TimeTable for User *Larsen Bent*			
Start	Stop	Description	Duration
Monday			
09:00 AM	04:00 PM		7:00
Total for Day			7:00
Tuesday			
09:30 AM	01:00 PM		3:30
01:00 PM	02:00 PM	Lunch	1:00
02:00 PM	05:00 PM		3:00
Total for Day			7:30
Wednesday			
09:00 AM	05:00 PM		8:00
Total for Day			8:00
Thursday			
09:00 AM	05:00 PM		8:00
Total for Day			8:00
Friday			
09:00 AM	02:30 PM		5:30
03:00 PM	06:00 PM	Work at the second office	3:00
Total for Day			8:30
Saturday			
Total for Day			0:00
Sunday			
Total for Day			0:00
Total per Week			39:00

This page will contain information on a user's daily routine. One may enter three different time records for each day.

To edit a user's TimeTable, click the Edit icon on the target row's left-hand side to see the following screen:


Softerra TimeAssistant - TimeTable - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Time-Assistant.com
Effective Time&Cost Tracking System
Time
Profile
Reports
Admin
Help
Logout
Display Settings
Change my Status
Profile
Change Password
View my Rates
TimeTable
Logged in: bent
04/21/2004 05:36 PM
Edit Tuesday for User Bent Larsen
Start
Stop
Description
09 AM 30 01 PM 00
01 PM 00 02 PM 00 Lunch
02 PM 00 05 PM 00
submit
reset
back
Time-Assistant Enterprise Demo © Copyright Softerra LLC 1999-2004
Done
Local intranet

If a Manager or an Employee do not have enough permissions to edit someone else's TimeTable, they'll see the following page version:

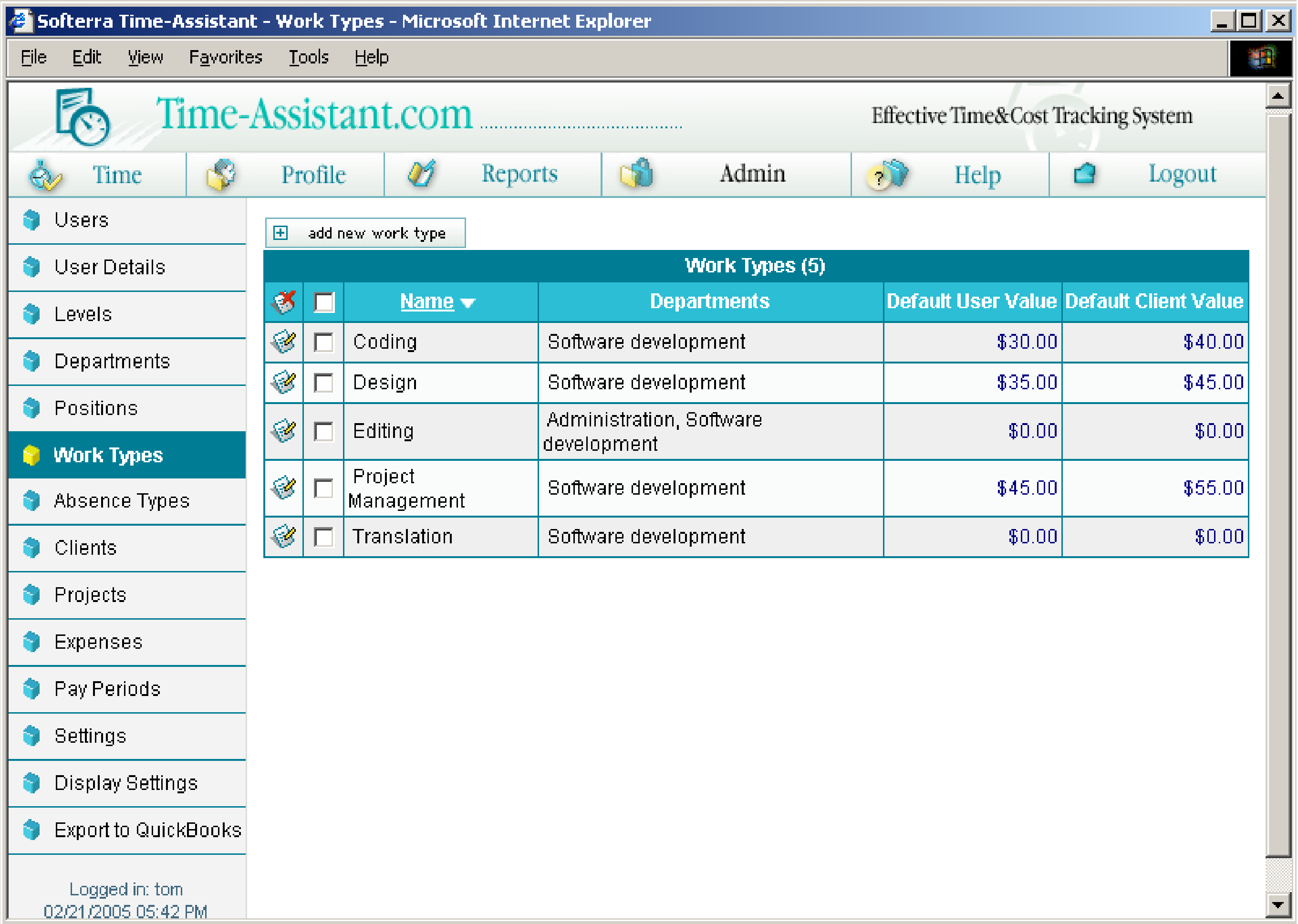


How Do I Manage Work Types?

The Work Types section contains information on employment categories. Each of them is supposed to have its own pay rates for a particular type of work, which may differ depending on the other user categories (levels) or departments. Each department needs to have its own set of work types.

NOTE! The Administrator is authorized to change Work Type information, while Employees and Managers are only allowed to edit Work Types if previously appointed to do so by the Admin.

Here is the list of Work Types for all company departments (the WORK TYPES button):



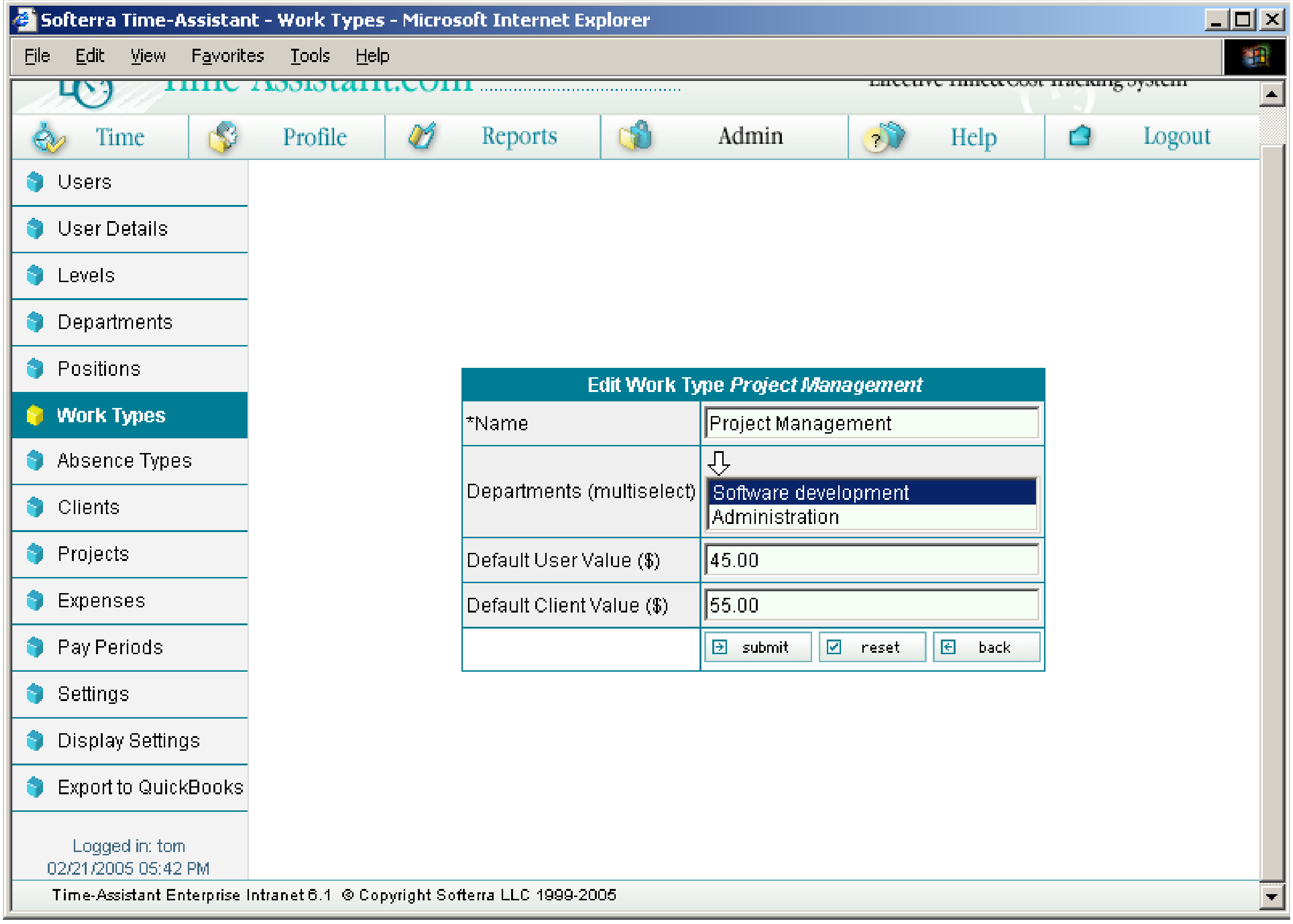
NOTE! Those users who are not allowed to edit Work Types, will not be able to view the default rate values either.

To sort Work Types in ascending/descending order, click the Name title.

To delete a Work Type, tick a box next to it and press Delete.

To add a new Work Type to a certain department, click the ADD NEW RATE button.

To apply changes to an existing Work Type, click the Edit icon on the left-hand side of a target row to see the following screen:


Softerra Time-Assistant - Work Types - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Time Profile Reports Admin Help Logout
Users
User Details
Levels
Departments
Positions
Work Types
Absence Types
Clients
Projects
Expenses
Pay Periods
Settings
Display Settings
Export to QuickBooks
Logged in: tom
02/21/2005 05:42 PM
Edit Work Type Project Management
*Name
Project Management
Departments (multiselect)
Software development
Administration
Default User Value ($)
45.00
Default Client Value ($)
55.00
submit
reset
back
Time-Assistant Enterprise Intranet 6.1 © Copyright Softerra LLC 1999-2005

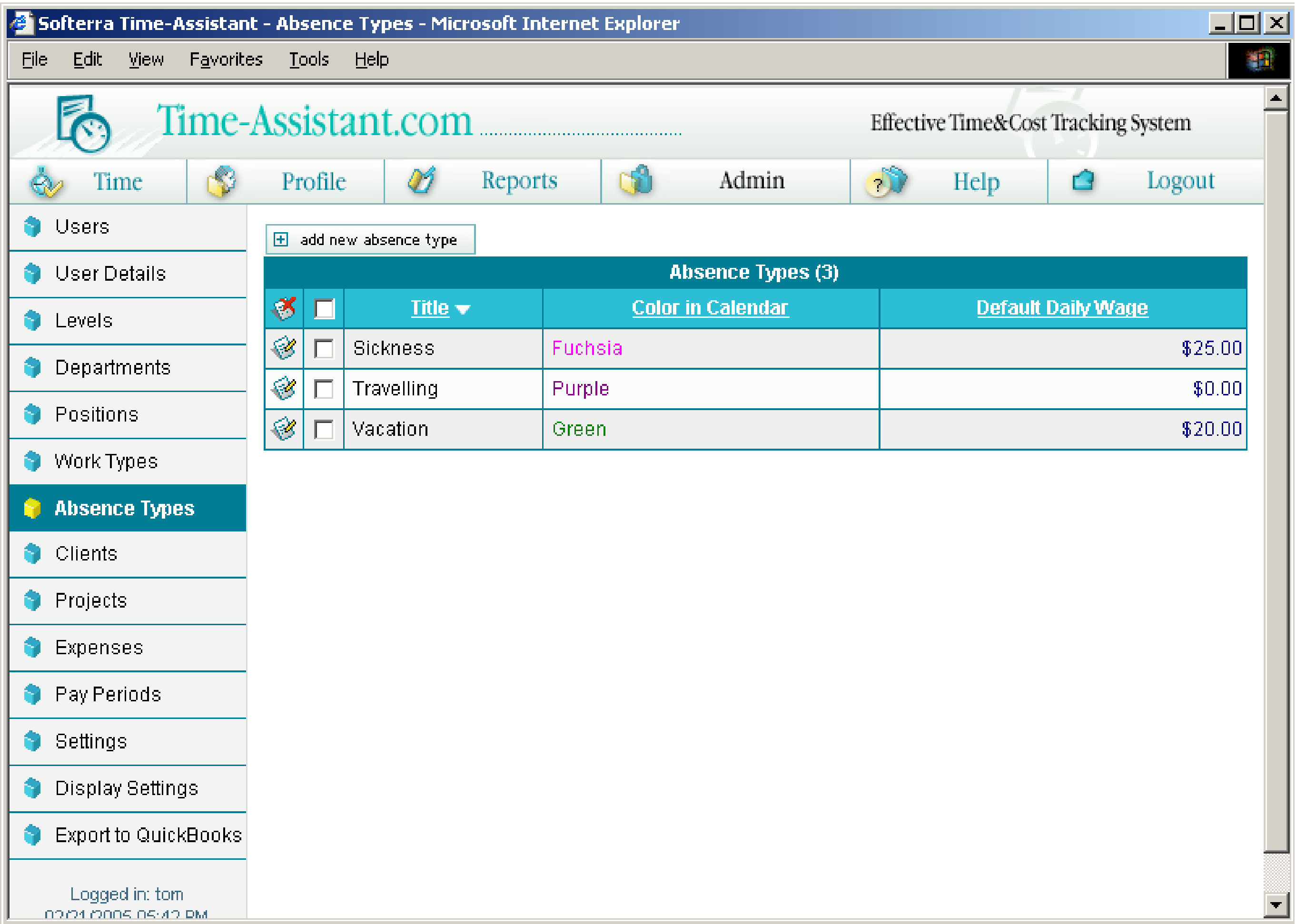
How Do I Manage Absence Types?

NOTE! This feature can be toggled from the Application Settings.

The Absence Types section contains information on absence reason types. Their may be vacations, sickness, etc. Each of them is supposed to have its own daily pay rate.

NOTE! The Administrator only authorized to change Absence Type information.

Here is the list of Absence Types:

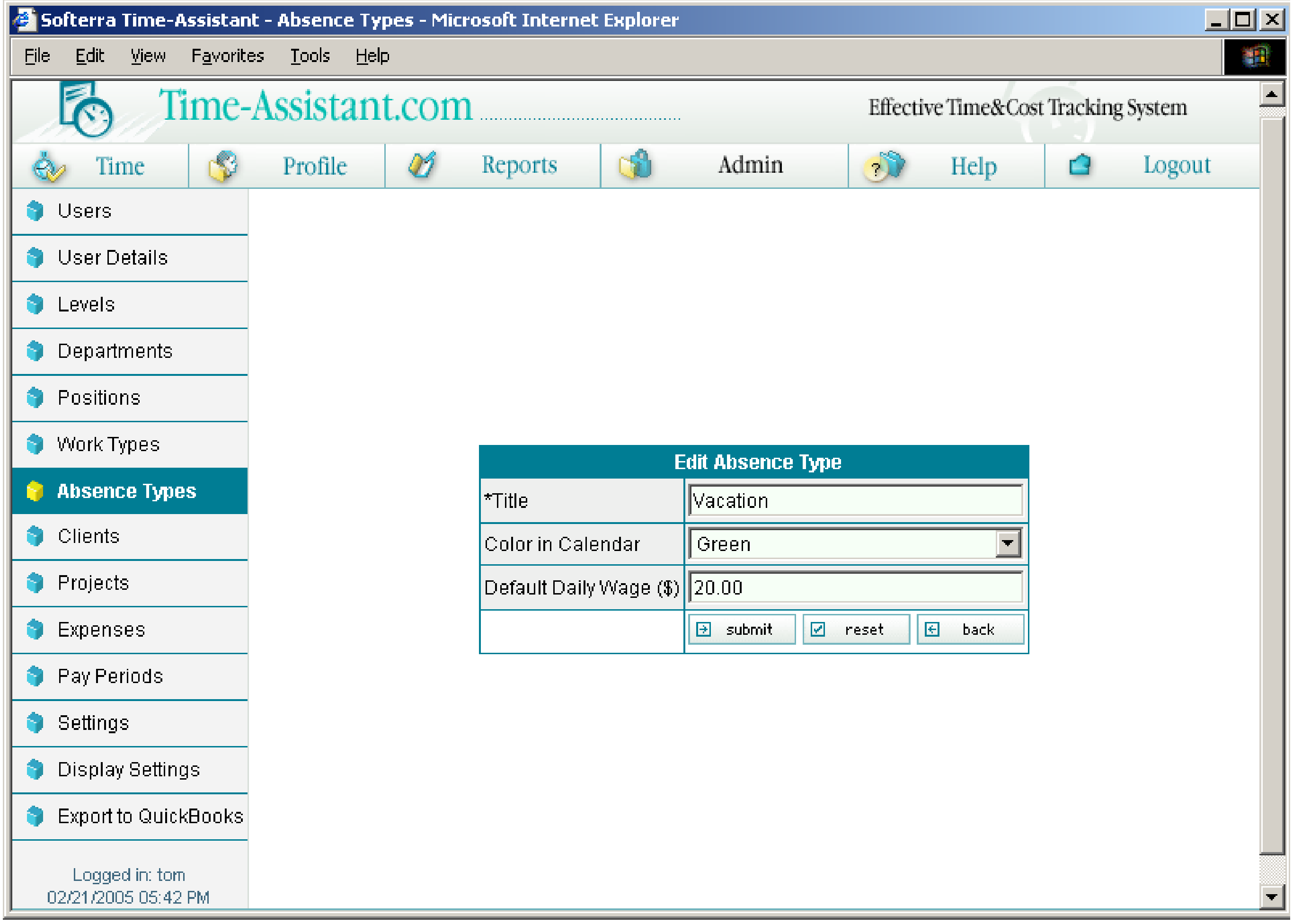


To sort Absence Types in ascending/descending order, click the Title title.

To delete an Absence Type, tick a box next to it and press Delete.

To add a new Absence Type, click the ADD NEW ABSENCE TYPE button.

To apply changes to an existing Absence Type, click the Edit icon on the left-hand side of a target row to see the following screen:


Softerra Time-Assistant - Absence Types - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Time-Assistant.com
Effective Time&Cost Tracking System
Time
Profile
Reports
Admin
Help
Logout
Users
User Details
Levels
Departments
Positions
Work Types
Absence Types
Clients
Projects
Expenses
Pay Periods
Settings
Display Settings
Export to QuickBooks
Logged in: tom
02/21/2005 05:42 PM
Edit Absence Type
*Title
Vacation
Color in Calendar
Green
Default Daily Wage ($)
20.00
submit
reset
back

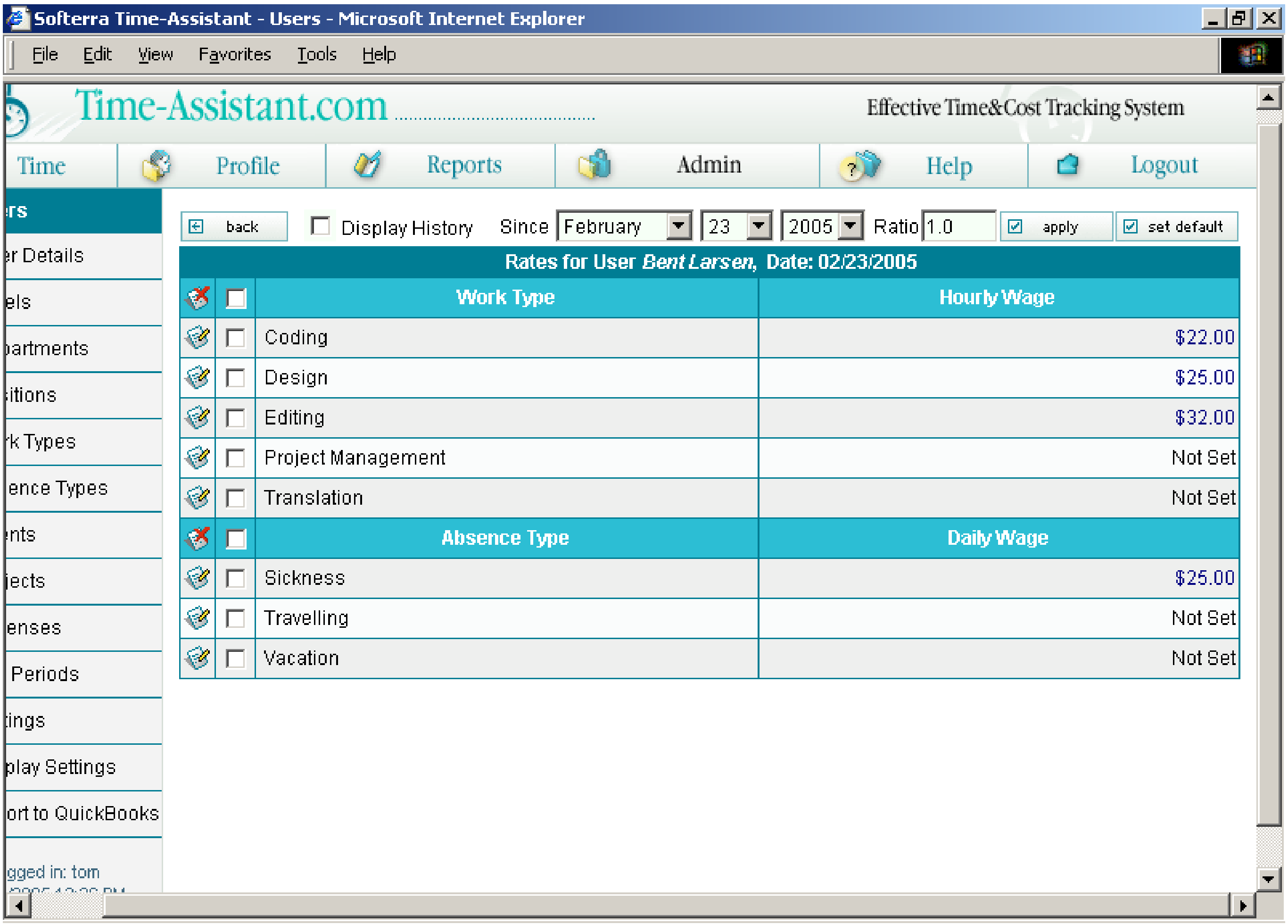
How Do I Assign Rates for Work Types and Absence Types?

NOTE! These features can be toggled from the Application Settings.

Usually users get paid differently depending on their Work Types on a per hour basis. So, to effectively calculate salaries, each user needs to have his personal pay rates. As for Absence Types, user can get paid on a per day basis.

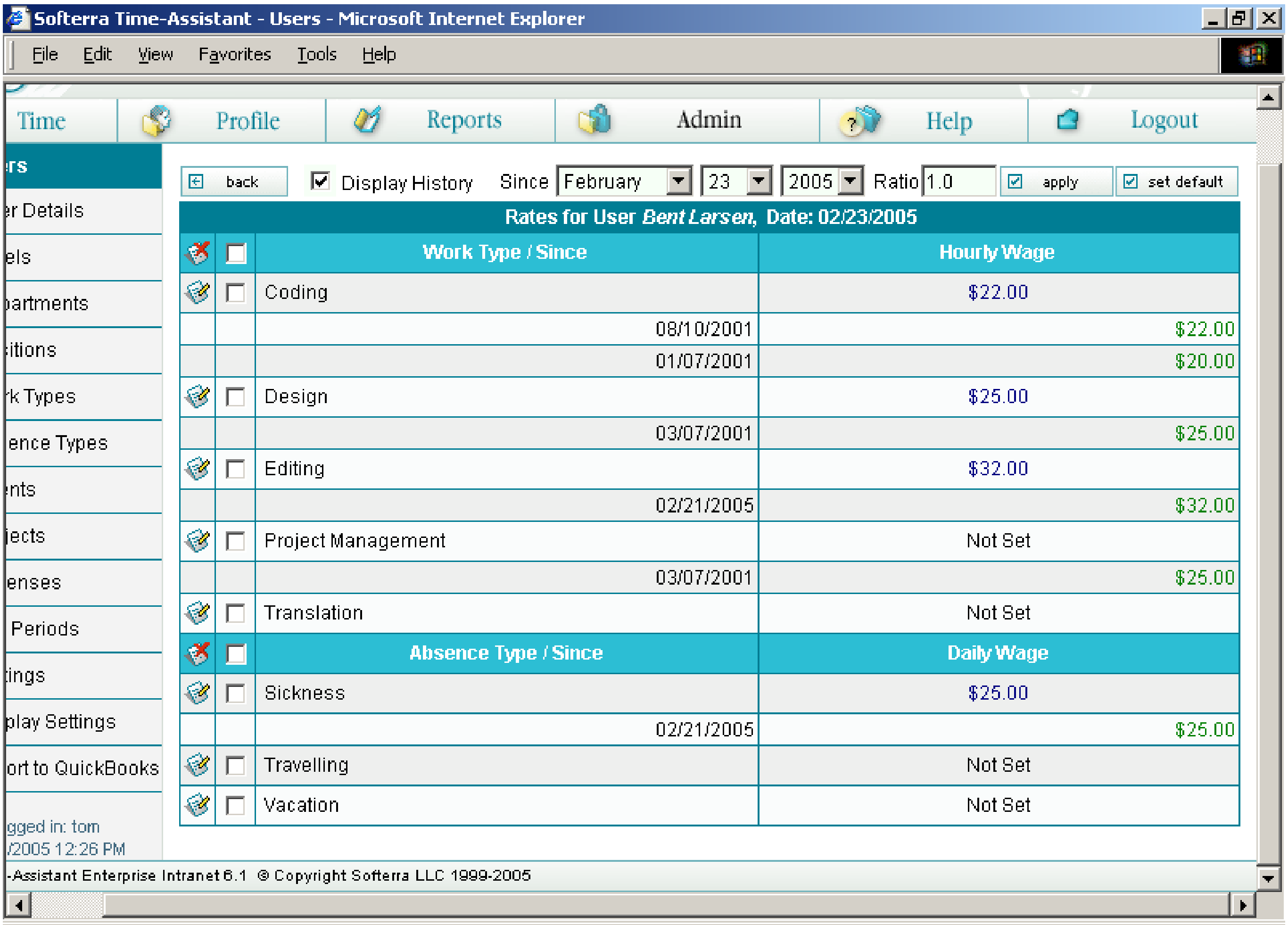
These rates may only be assigned by Administrators or Managers, with the latter being limited to just setting rates for their SUBORDINATES (both Employees and other Managers).

To enter a particular rates, an Administrator or Manager should go to the USERS page, then click the Rates icon in a target user table row in order to get to a page for entering pay rates per Work Type.



This is an example of the ‘User Rates’ page, which displays a current state of the user pay rates. If there’s been more than one change made during one day, it is the latest (final) one that is taken into account.

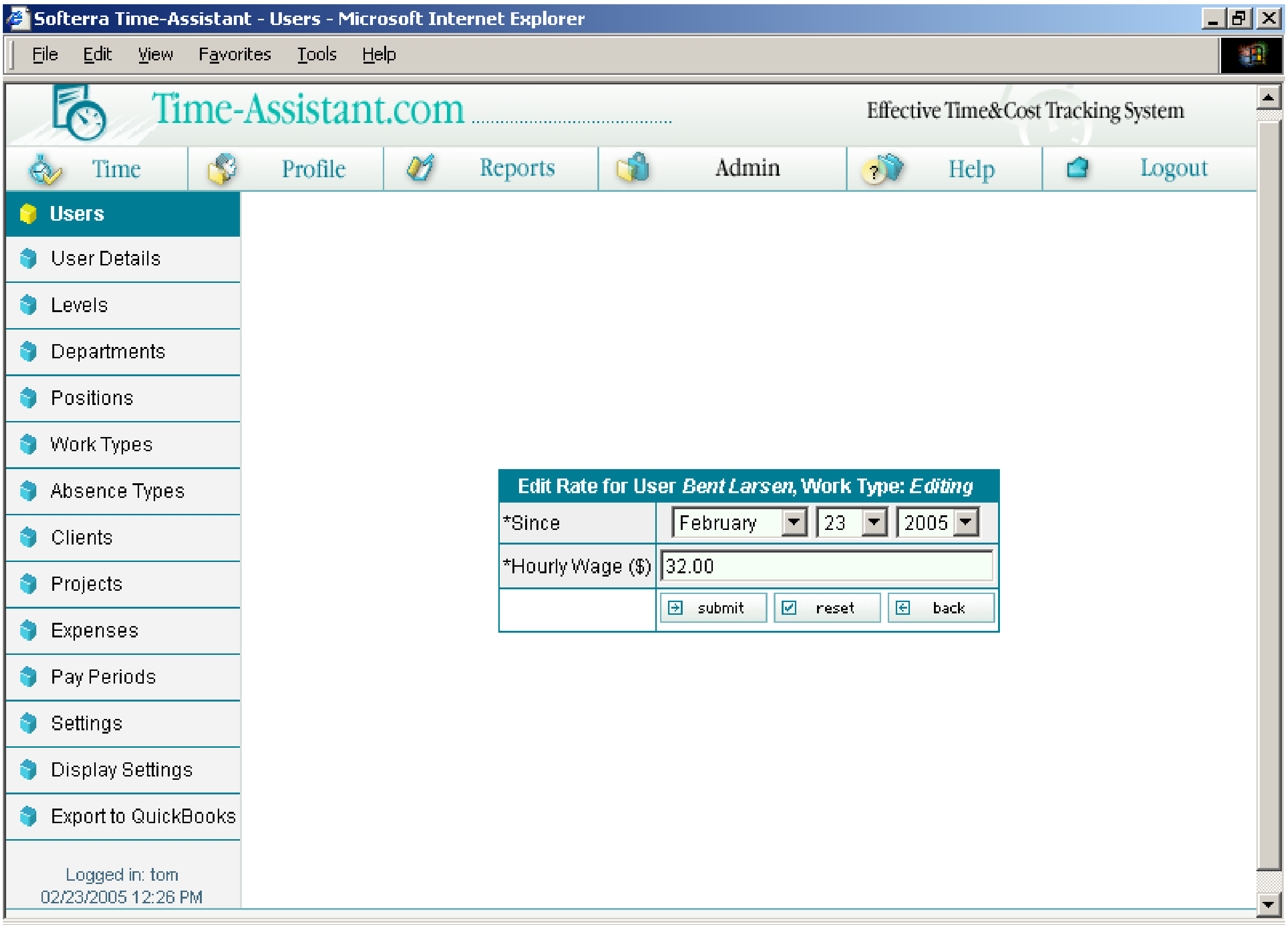
To keep track of Rates History please check ‘Display History’ checkbox.
You’ll see the following screen:



It is possible change all user rates to some ratio starting from the selected date. To do this one should specify date and ratio and click 'Apply' button.

Clicking the 'Set Default' button will restore the default user rate values (preset by the Admin) for all Work and Absence Types starting from the selected date.

To edit an existing rate, one has to click the Edit icon on the left-hand side of a target table row to see the following screen:



As to Employees, they may just view their own rates and rate history via the USERS or VIEW MY RATES pages (described above).

How Do I Work with My Company's Projects?

In Time-Assistant, a project signifies a complex and extensive task aimed to satisfy the requirements of a client, who, in turn, is an ordering individual or an organization. Among other things, a project in the application is expected to have a client assigned to it.

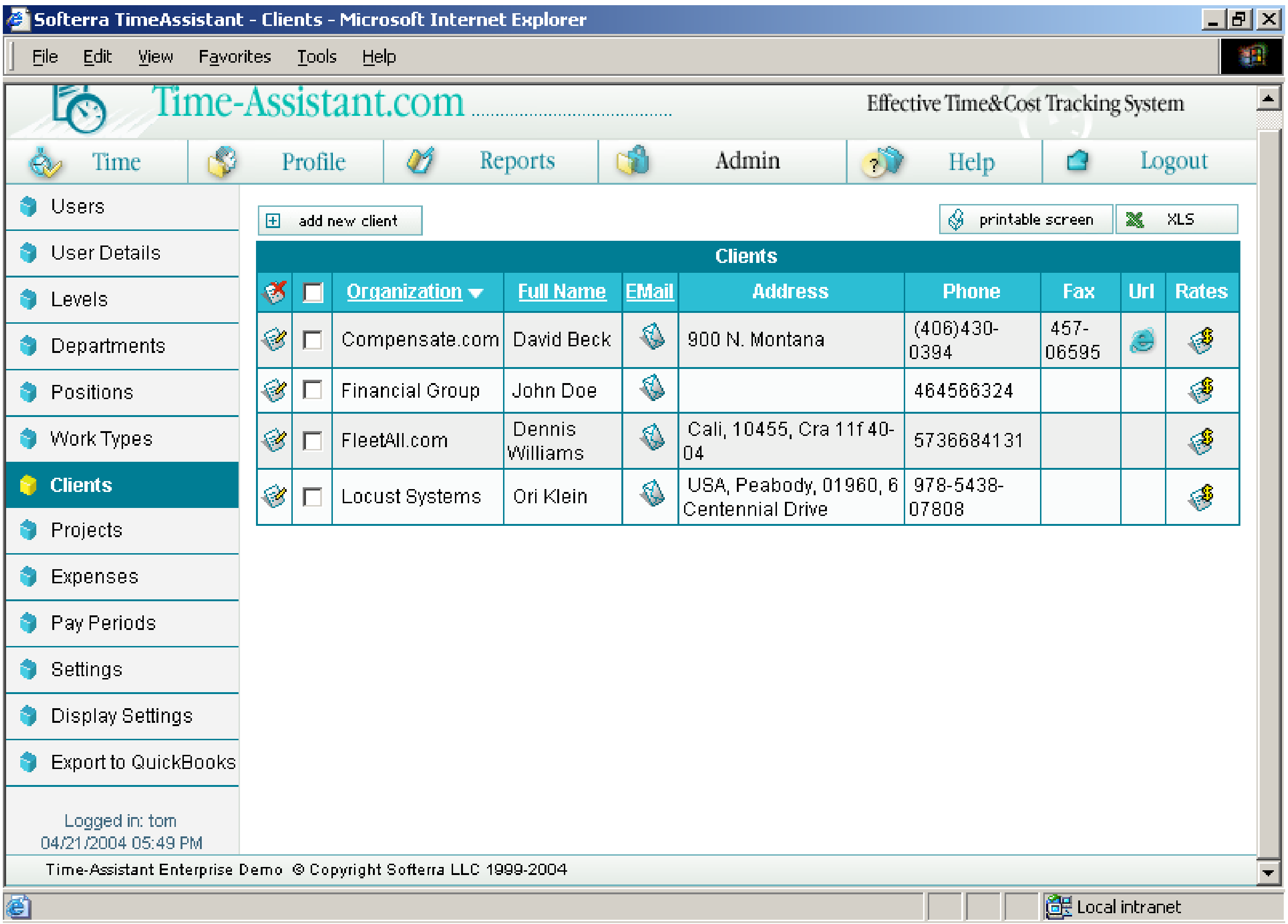
Managing Clients

NOTE! The Clients functionality can be toggled or set as optional from the Application Settings.

Apart from the Administrator, client information can be handled by any kind of a Time-Assistant user, i.e. both Managers and Employees, provided they have appropriate permissions.

NOTE! This section assumes a user is permitted not just to view, but also to edit client information.

To get to the Clients page, one needs to click the Clients button on the left-hand side navigation panel in the Admin menu. The following page will display:



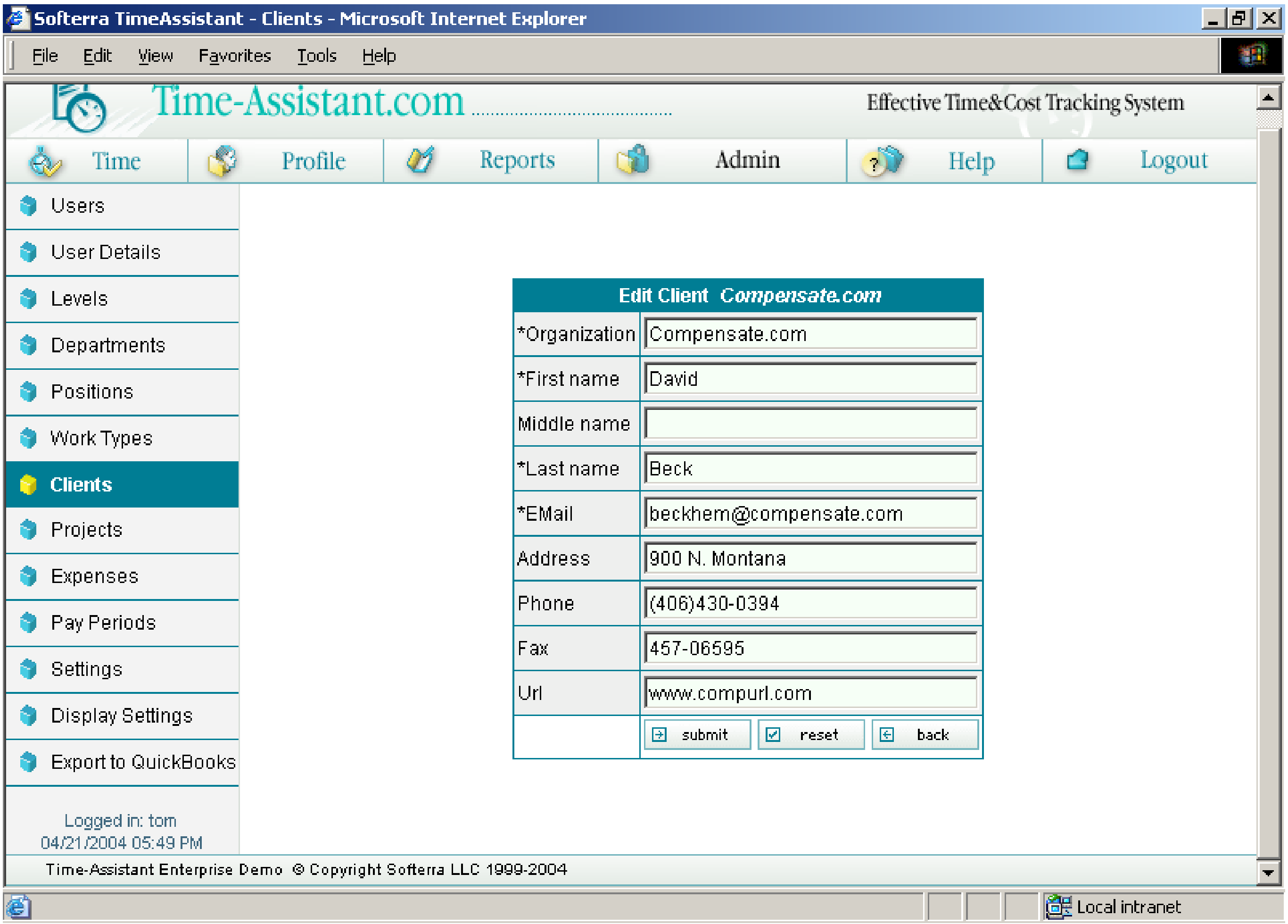
To sort Clients by their Organization, First Name, Last Name or Email in the ascending/descending alphabetical order, click a target title located in the title row.

To delete a Client, tick a box next to it and press Delete.

To export the list of clients to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

To be able to add new Client information, press Add New Client.

To edit Client information, click the Edit icon to the left of the client's name. As a result the following page will display:



Use this page to enter or edit the following client information:

- Organization
- Full Name
- Email
- Address
- Phone
- Fax
- URL

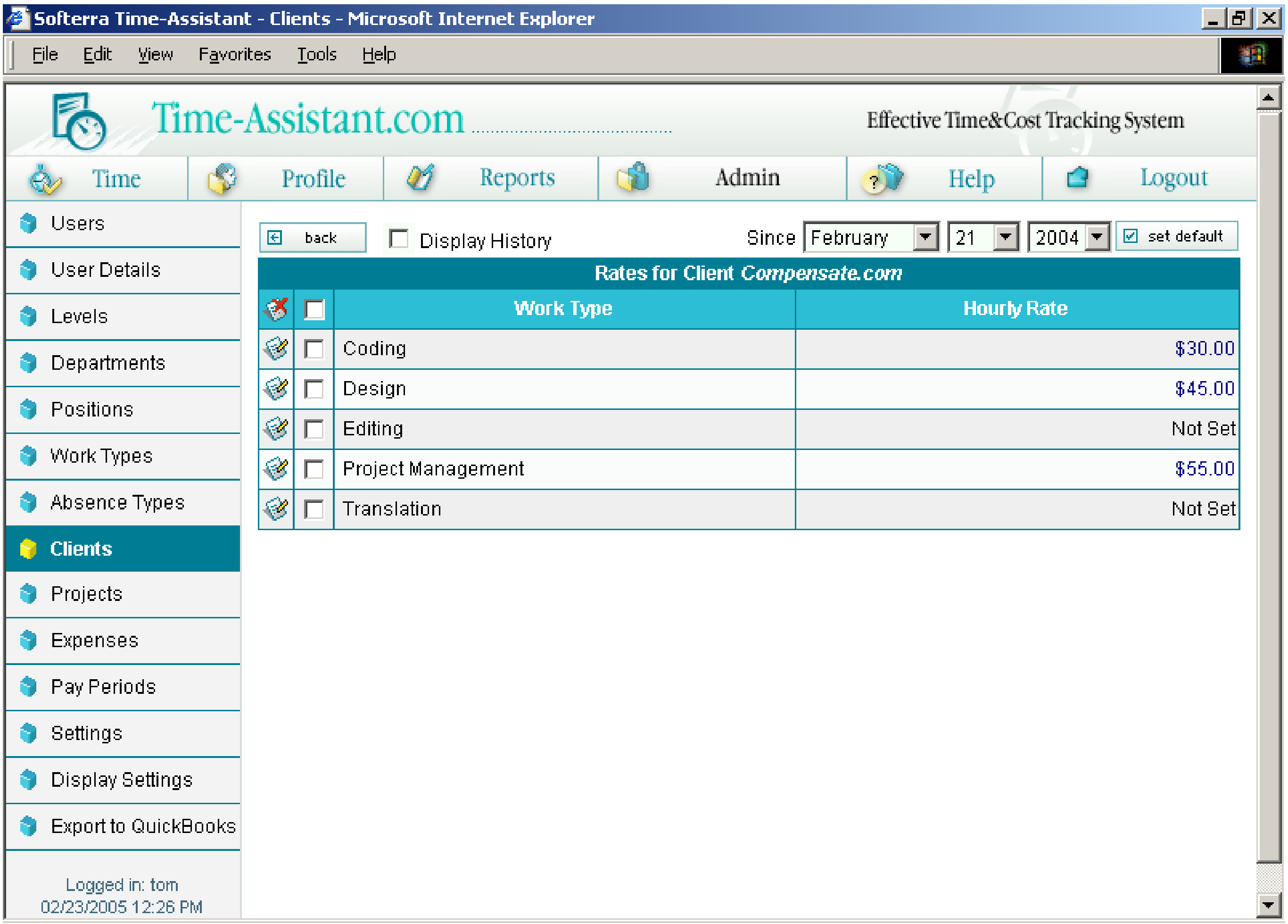
Having filled the fields or made the desired changes, click Submit to confirm or Reset to dismiss the information entered.

Setting Client Rates

NOTE! The Client Rates functionality can be toggled from the Application Settings.

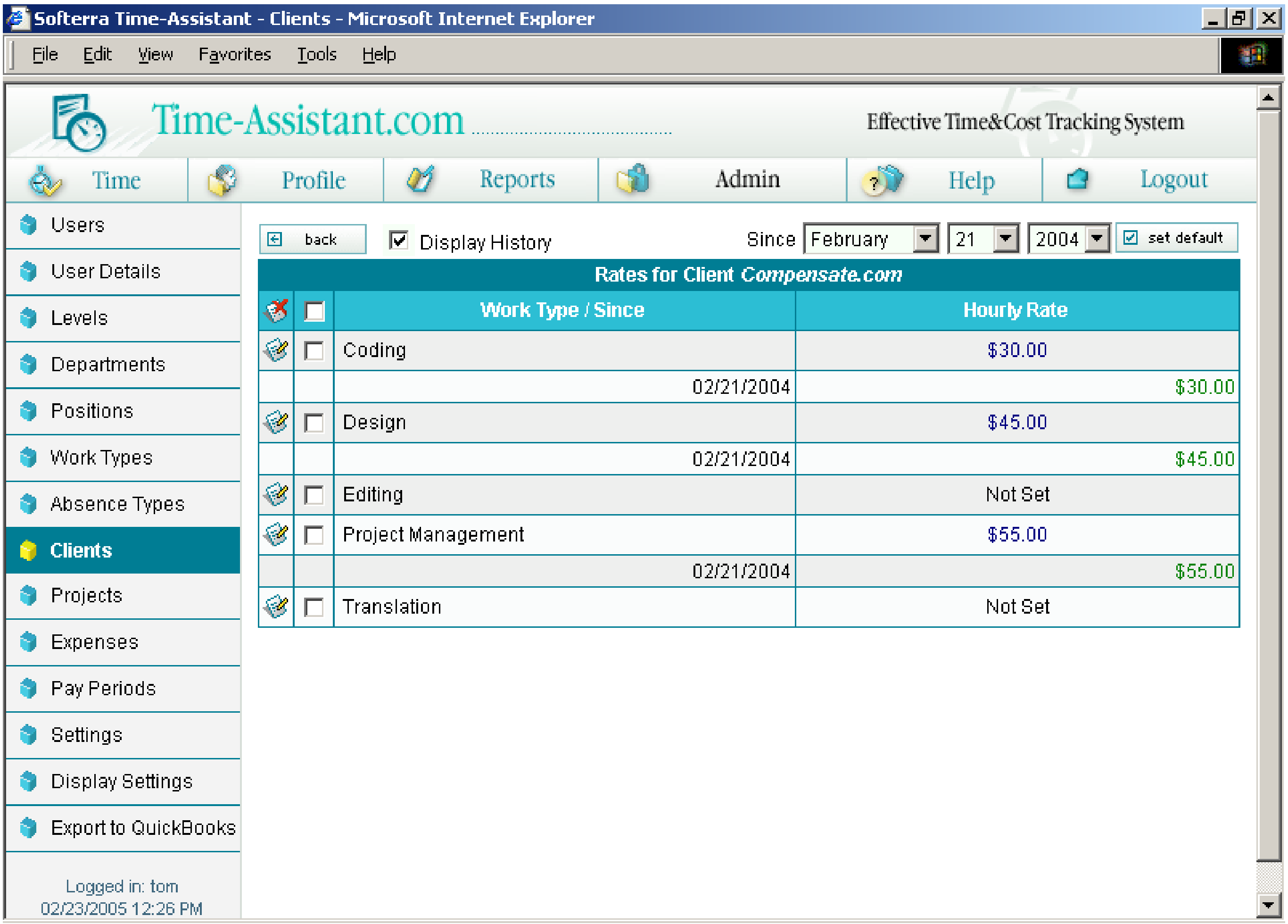
Usually Client fees are charged on an individual basis, i.e depending on Work Types on an hourly basis. So, to be able to efficiently calculate invoices, each client must have its personal charge rates pre-assigned.

To enter a Work Type for a client, an Administrator should go to the CLIENTS page, then click the Rates icon in a target client table row. This will display a page for setting charge rates per each Work Type (shown below).



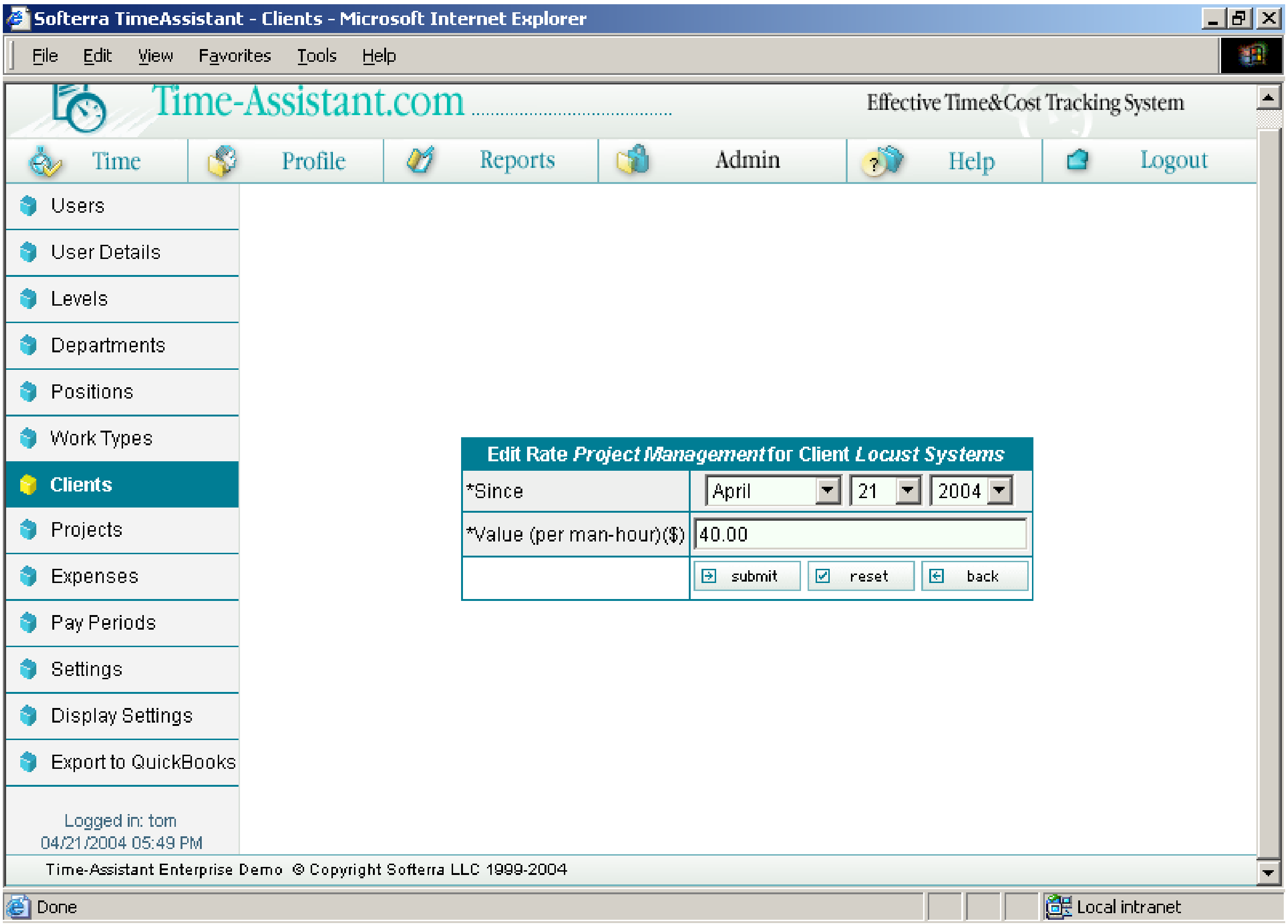
The ‘Client Rates’ page contains information on a current state of the client charge rates. If there’s been more than one change made during one day, it is the latest (final) one that is taken into account.

To keep track of Rates History please check ‘Display History’ checkbox.
You’ll see the following screen:



Clicking the ‘Set Default’ button will restore the default client charge rate values (preset by the Admin) for all Work Types starting from the selected date.

To edit an existing rate, one has to click the Edit icon on the left-hand side of a target table row to display the following screen:

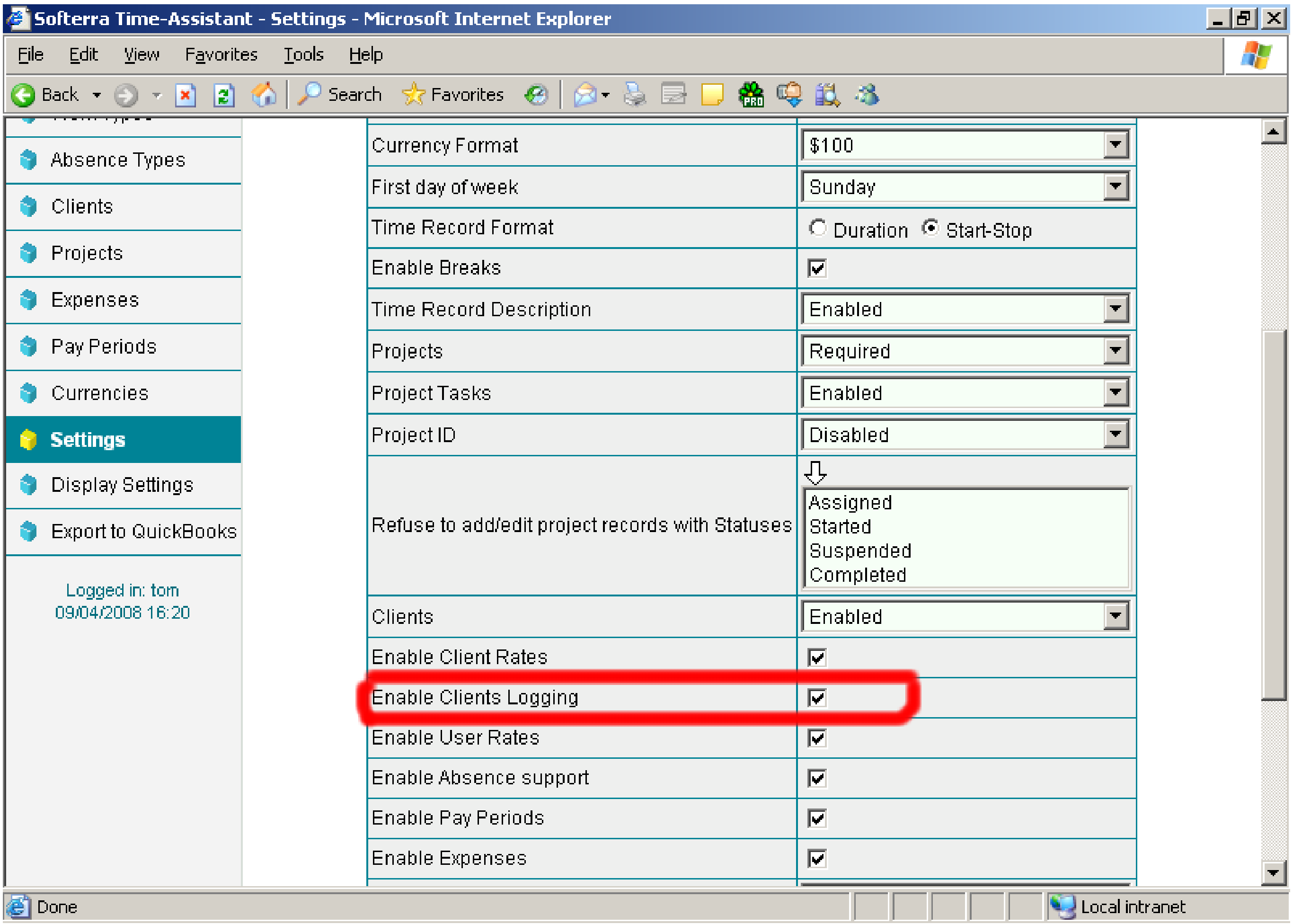


Use this page to apply the required changes to an existing rate, then press SUBMIT to save changes, RESET – to discard, or BACK – to return to the Client Rates list.

Toggle Clients Logging

NOTE! This functionality can be toggled from the Application Settings.

NOTE! Only the Administrator is authorized to edit this setting.

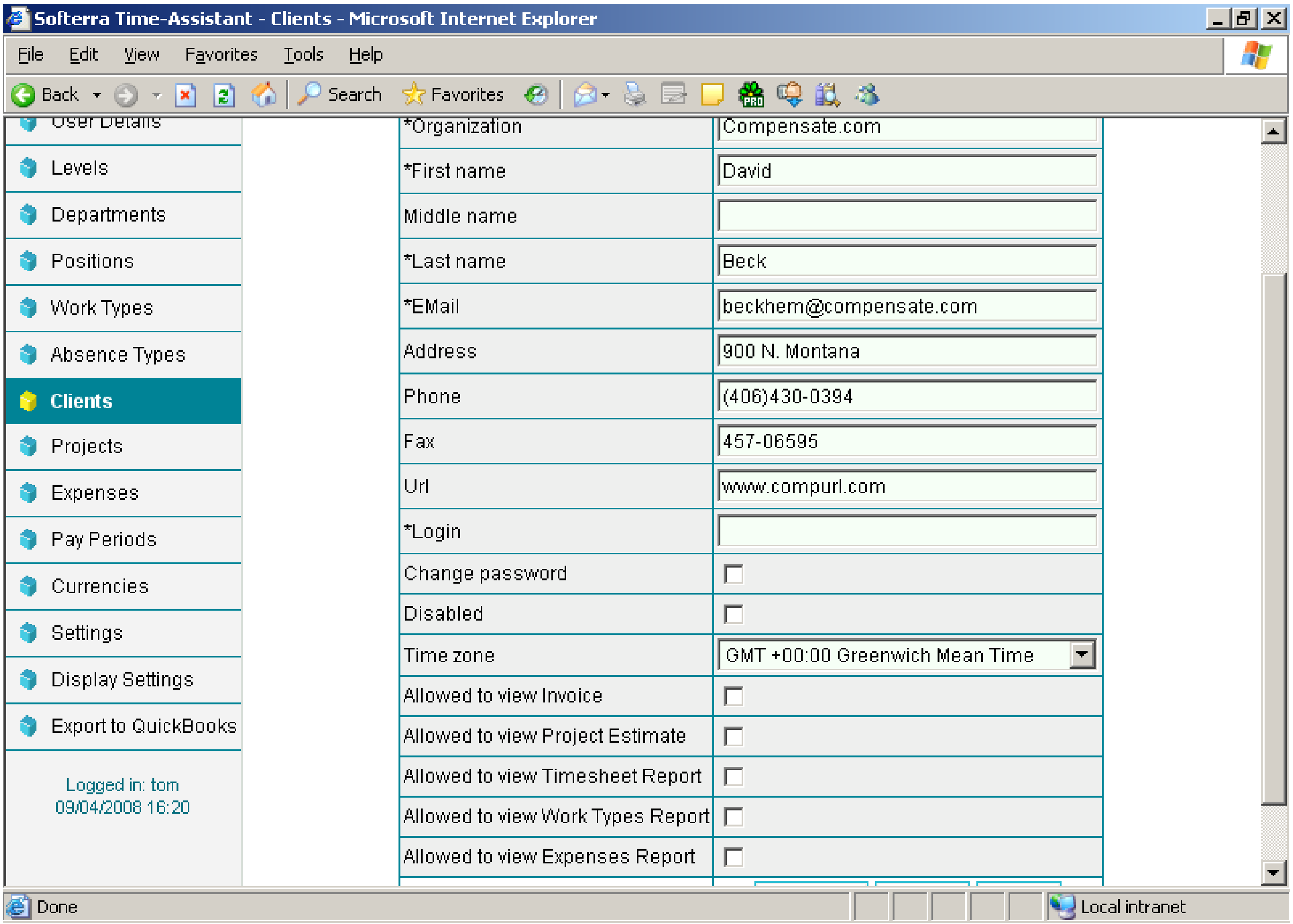


Set Client permissions and authorization settings

If the Client Logging feature is enabled, users authorized to manage client information can specify Client log settings and Client permissions on the Edit Client page.

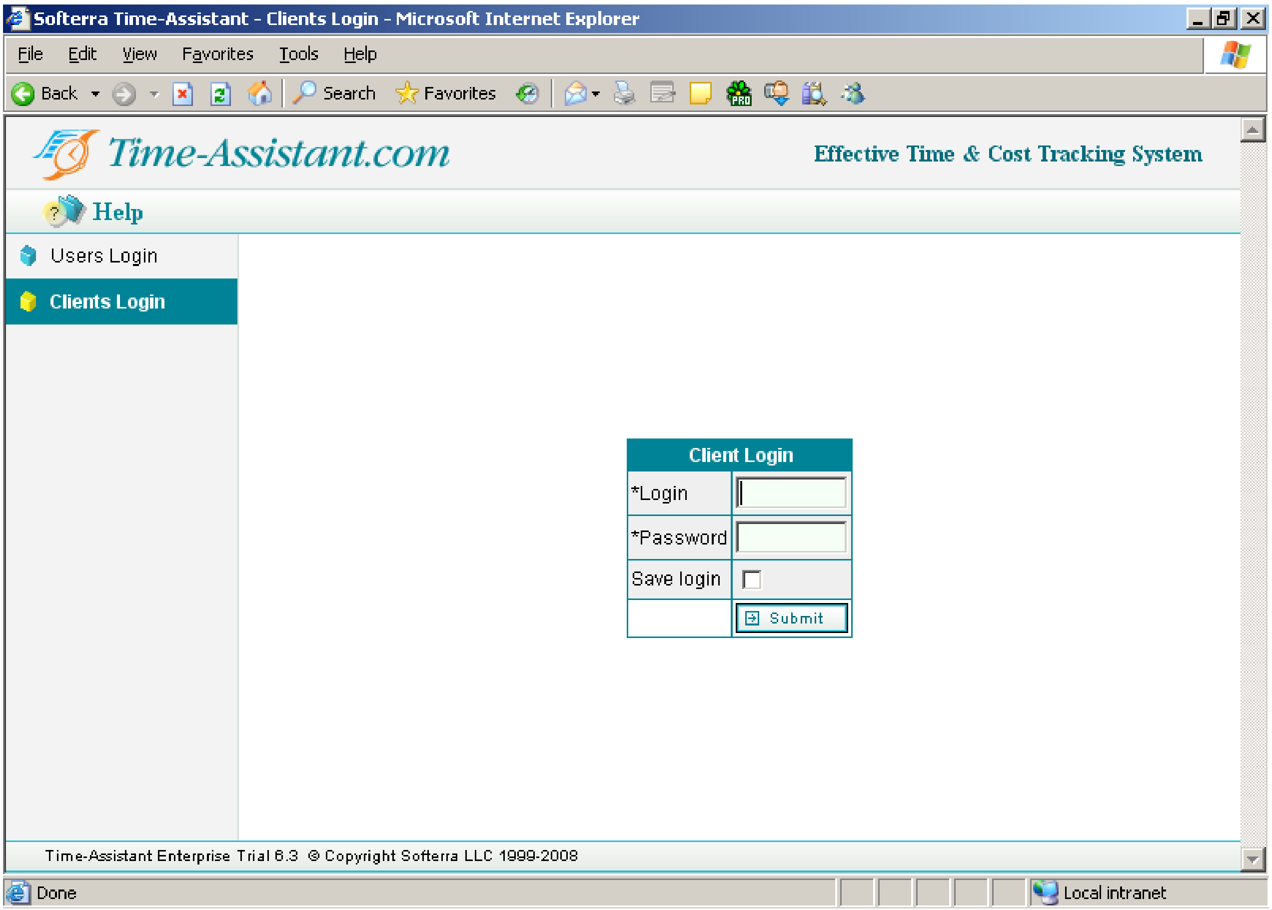
The following attributes become available:

- Client Login and Password
- Enable/Disable Client option
- Client Time Zone
- Address
- Permissions to view the following Reports:
  - Invoice
  - Project Estimate
  - Timesheet Report
  - Work Types Report
  - Expenses Report


Softerra Time-Assistant - Clients - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back
Search
Favorites
User Details
Levels
Departments
Positions
Work Types
Absence Types
Clients
Projects
Expenses
Pay Periods
Currencies
Settings
Display Settings
Export to QuickBooks
Logged in: tom
09/04/2008 16:20
*Organization
Compensate.com
*First name
David
Middle name
*Last name
Beck
*EMail
beckhem@compensate.com
Address
900 N. Montana
Phone
(406)430-0394
Fax
457-06595
Url
www.compurl.com
*Login
Change password
Disabled
Time zone
GMT +00:00 Greenwich Mean Time
Allowed to view Invoice
Allowed to view Project Estimate
Allowed to view Timesheet Report
Allowed to view Work Types Report
Allowed to view Expenses Report
Done
Local intranet

Client Logging

When the Client Logging feature is enabled, Clients Login page becomes accessible. This page allows Clients to enter their login names and passwords required for authorization.



Client Permissions

Clients have access to the following features:

- View PERSONAL rates;
- Edit PERSONAL Profile and Display Settings;

These features are similar to those used for users. Please refer to the corresponding chapters for more details.

Clients have different sets of reports available for each of them based on personal permissions preset by the Administrator.

- Timesheet Report by Projects of personal assignment for a certain period;
- Work Type Report by Projects of personal assignment for a certain period;
- Expenses Report by Projects of personal assignment for a certain period;
- Estimate for Projects of personal assignment;
- Invoice for Projects of personal assignment;

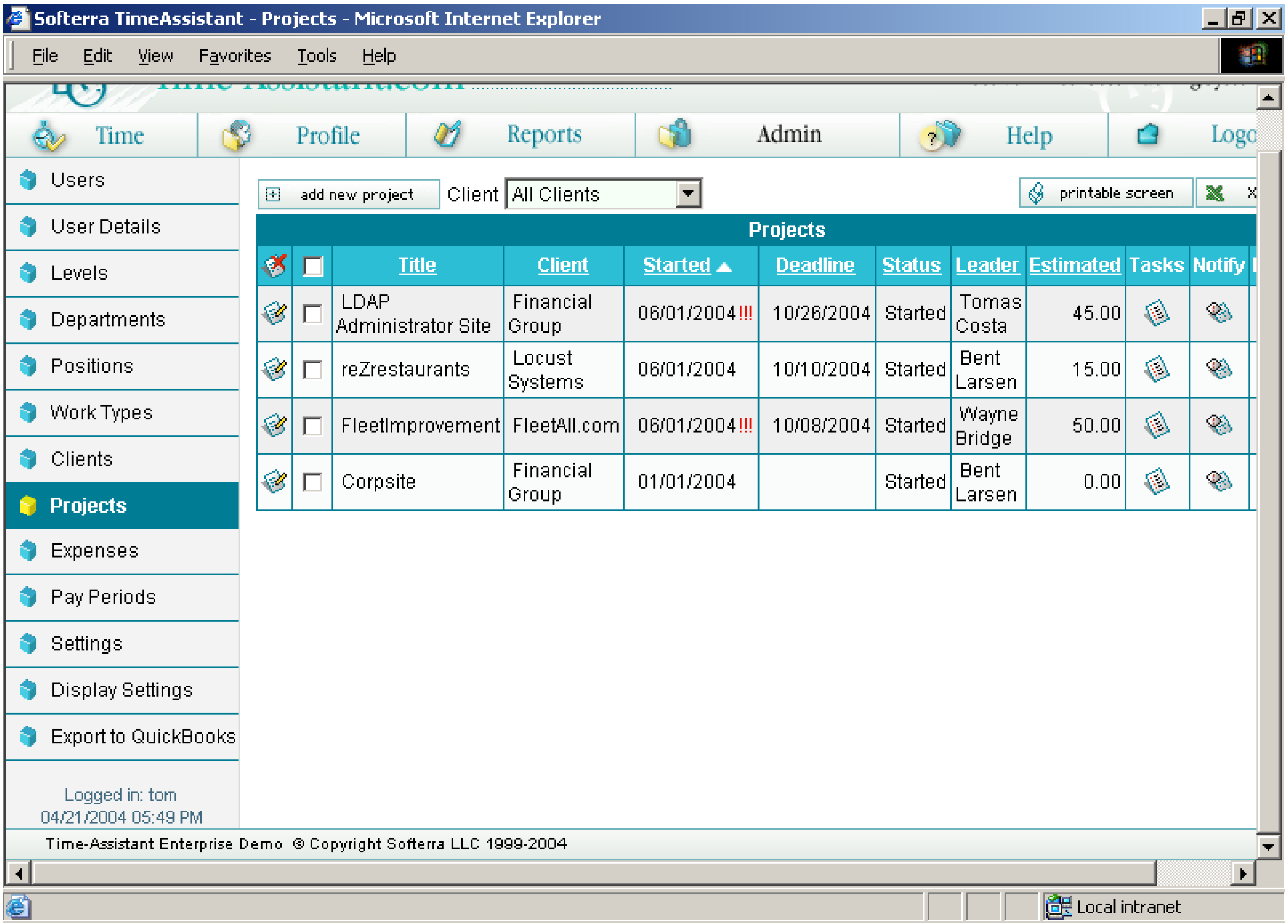
These reports are the same as for users. Please refer to the corresponding chapters for more details.

Managing Projects

NOTE! The Projects functionality can be toggled or set as optional from the Application Settings.

Managing projects, i.e. editing project information, is a prerogative of Administrators, Managers (in relation to their Subordinates) and Employees (if properly enabled by the Admin or supervising Manager).

To access the Edit Projects page, one should click the Projects button on the left-hand side navigation panel in the Admin menu to display a list of projects (if any at that moment):



This list will contain the following information:

- Title
- Client for the project
- Start Date
- Deadline
- Project Status

- Project Leader
- Estimated Time
- Project Notifications link
- View Details link
- Project ID (if the 'Display project ID' setting is enabled in the Application Settings)
- View Tasks (if Tasks are enabled in the Application Settings)

If the total estimated time for tasks exceeds the time estimated for the whole project, or if the start date of one of the project tasks goes before the project start date, or the deadline for one of the project tasks goes after the project deadline, a warning icon (triple exclamation mark) will be displayed.

To sort the projects by one of their selected properties ('Title', 'Client', 'Start date', 'Status' or 'Leader') in ascending/descending alphabetical order, click an appropriate title in the list.

To export the list of projects to an XLS file, click a corresponding button in the upper right hand corner of the screen.

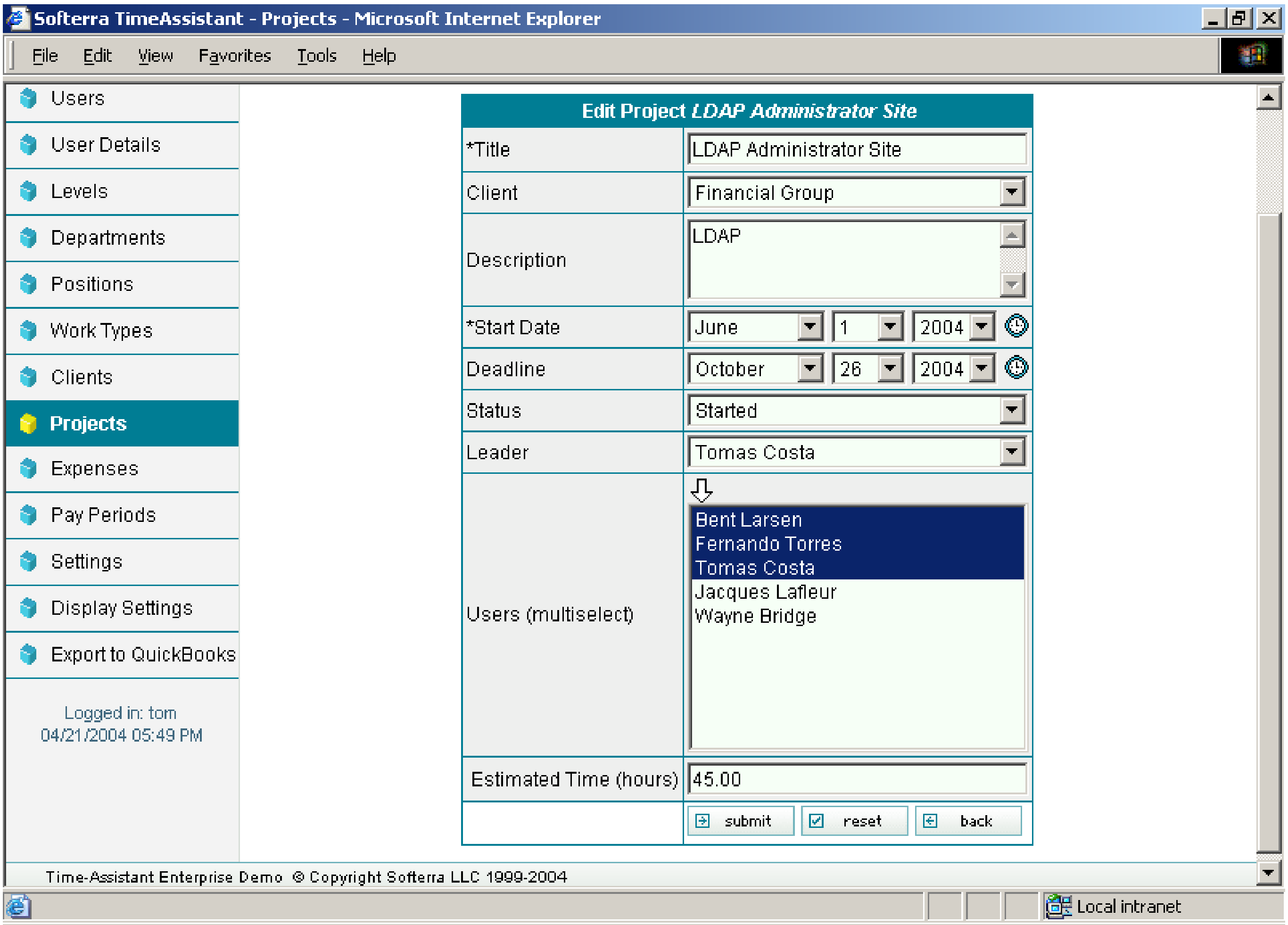
To delete a project, tick a box next to it and press Delete.

To add a project, click the Add New Project button to move over to the Add/Edit Project page so to enter/edit the following information:

- Title
- Client for the project
- Start Date
- Deadline
- Project Status
- Project Leader
- Employees to be involved in the project
- Estimated Time
- Project ID (if the 'Display project ID' setting is enabled in the Application Settings)

NOTE! Those users who have the 'Automatically add to all new projects' checkbox enabled for them by the Administrator or a Supervising Manager from the Edit User page, will already appear pre-selected.

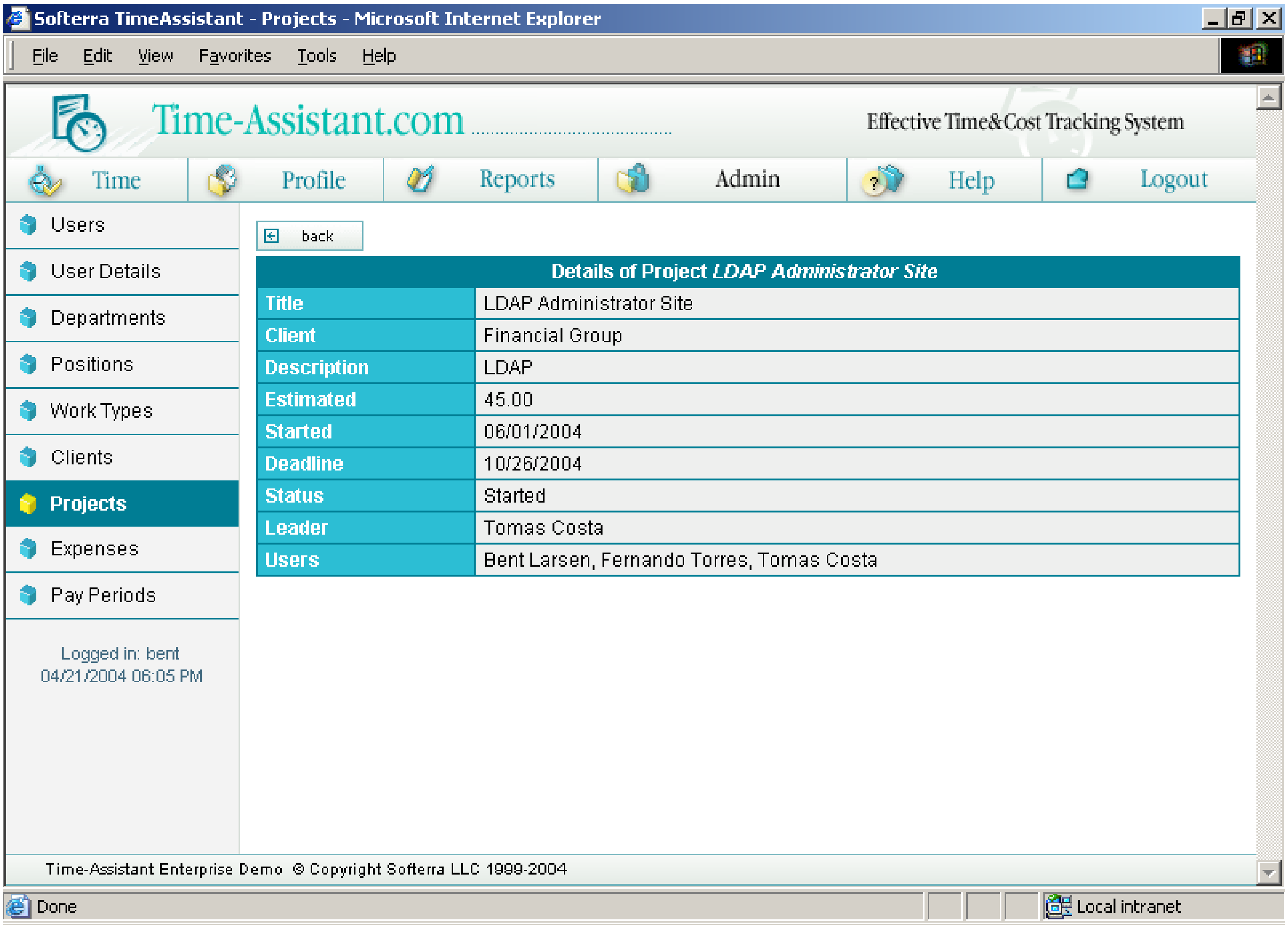
To edit a project, i.e. to change values of the above-mentioned fields, just click the Edit icon to the left of the project's name. The following page will display:



Having applied the desired changes, click SUBMIT to save changes, RESET – to discard, or BACK – to return to the List of Projects.

Project Details (View-only)

On a screenshot below you can see the ‘View Project Details’ page displayed to all users who do not have enough permissions to edit projects, as a result of their clicking the View link in the Details table column (on the List of Projects page).


Softerra TimeAssistant - Projects - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Time-Assistant.com
Effective Time&Cost Tracking System
Time
Profile
Reports
Admin
Help
Logout
Users
User Details
Departments
Positions
Work Types
Clients
Projects
Expenses
Pay Periods
Logged in: bent
04/21/2004 06:05 PM
back
Details of Project LDAP Administrator Site
Title LDAP Administrator Site
Client Financial Group
Description LDAP
Estimated 45.00
Started 06/01/2004
Deadline 10/26/2004
Status Started
Leader Tomas Costa
Users Bent Larsen, Fernando Torres, Tomas Costa
Time-Assistant Enterprise Demo © Copyright Softerra LLC 1999-2004
Done
Local intranet

Managing Project Tasks

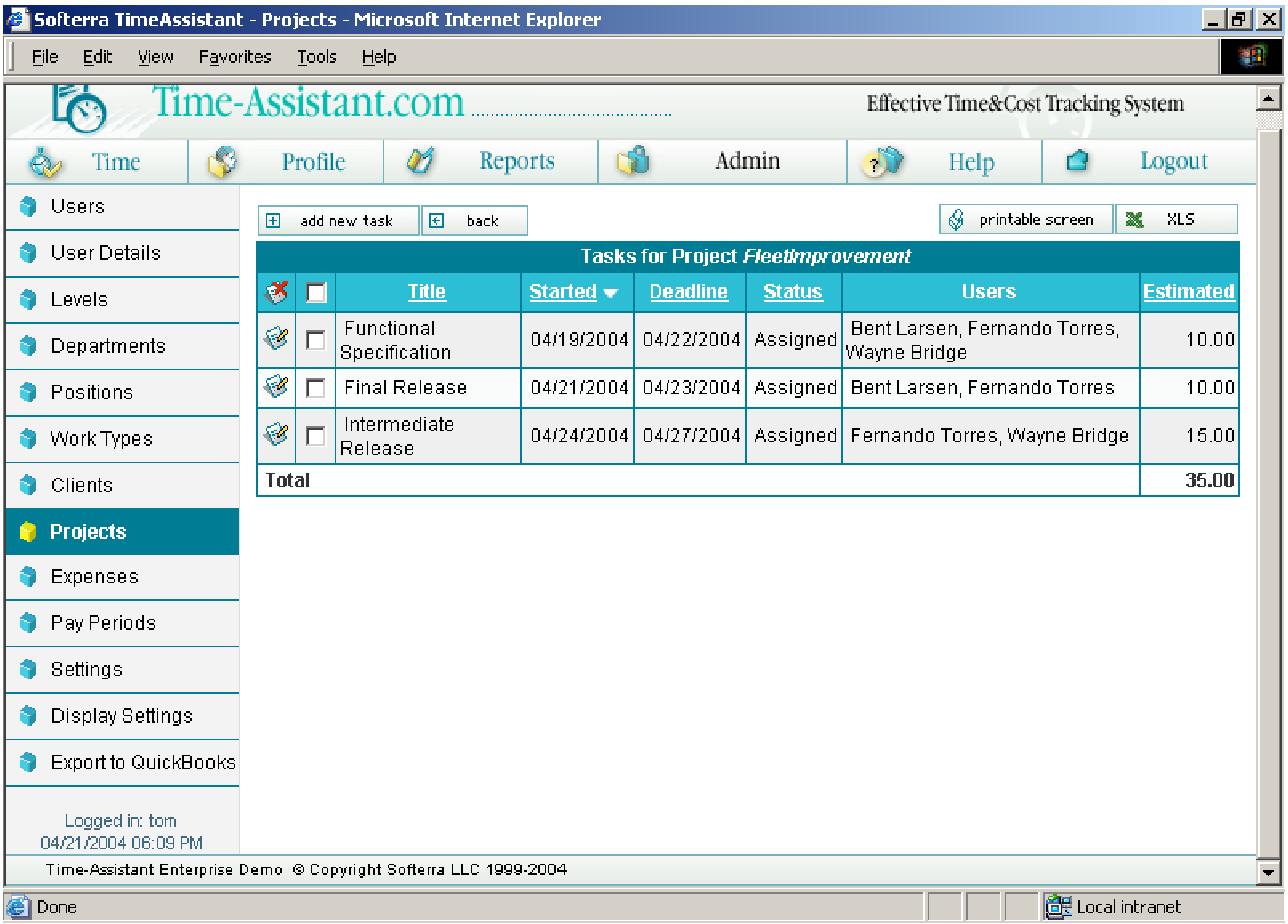
NOTE! This feature is supported in the Enterprise version only!

Note! Tasks can be toggled from the Settings for the entire application. However, authorized users may safely disable Tasks for certain Employees via their personal Display Settings in case one is just involved in projects that do not contain any tasks.

If Tasks are disabled, then:

- The View Tasks icons will not be displayed on the Project page
- The Select Task item in the Time Record form (see below) will be hidden
- The Tasks column on the TimeTrack and Reports pages will be hidden

To display the list of tasks, click the View link located in a target project row inside the Tasks column for the following page to open:



To sort tasks by one of their selected properties ('Title', 'Start date', 'Deadline', 'Status', 'Estimated Time') in ascending/descending alphabetical order, just click a target property title.

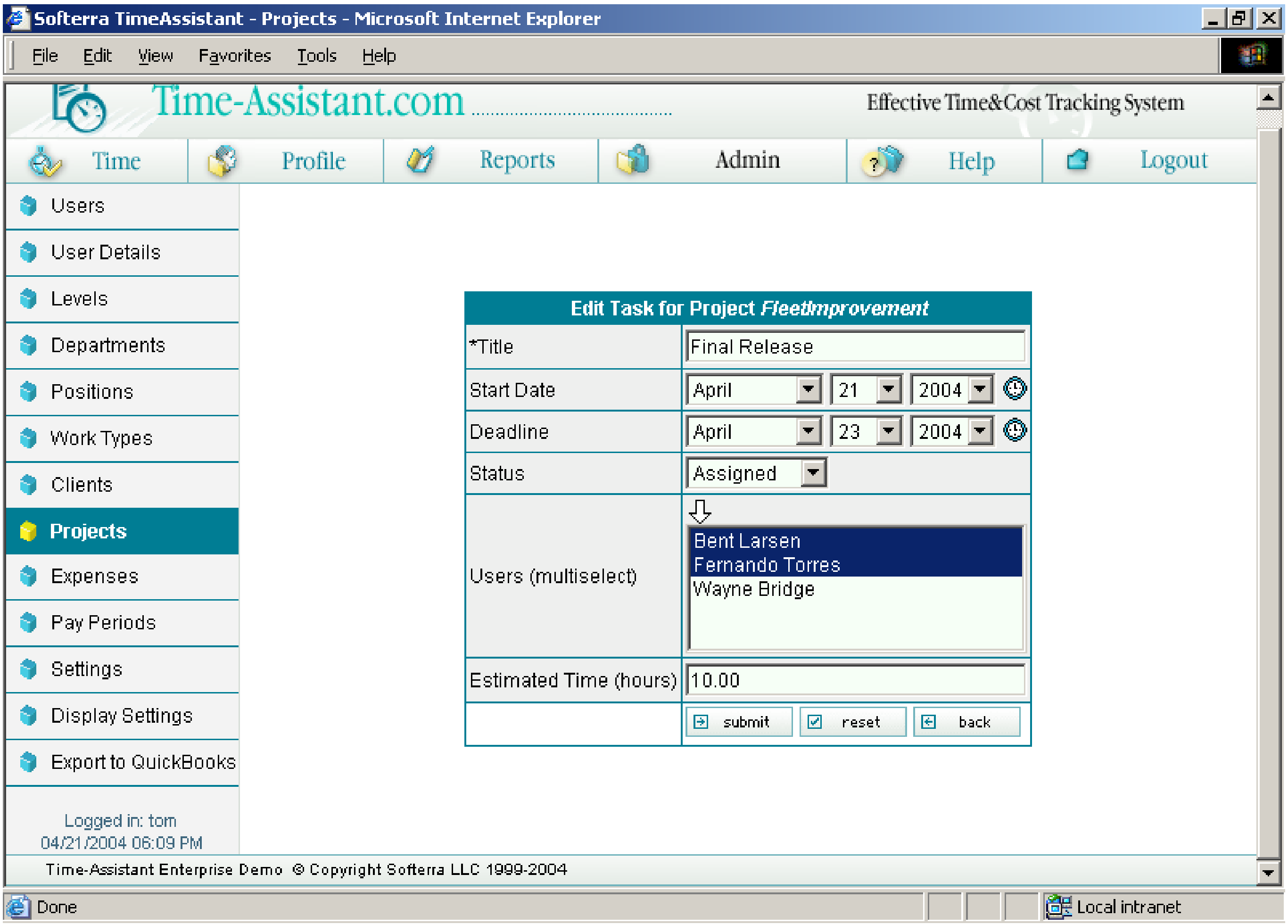
To export the list of tasks to an XLS file, click a corresponding button in the upper right hand corner of the screen.

To delete a Task, tick a box next to it and click Delete.

NOTE! It is not just the Administrator and properly authorized Managers/Employees who may add new tasks to a project or edit existing tasks. These features are also available to Project Leaders as regards projects they are involved in directly.

To add a Task, click the Add New Task button to get to the Add Task page. On that page, select a task Start Date, Deadline, Estimated Time, enter its Description, assign a Status for it and Users to be involved in performing the task.

To edit an existing project task, click the Edit icon located to the left of a target project in the list. This will take you to a page very similar to the one called 'Edit Task'.



Use this page to change whatever information you want and then click SUBMIT to save changes, RESET – to discard, or BACK – to return to the List of Projects.

Other Employees are also allowed to view tasks for projects of their personal involvement, without, however, being able to edit them. What remains available is just the sorting feature.

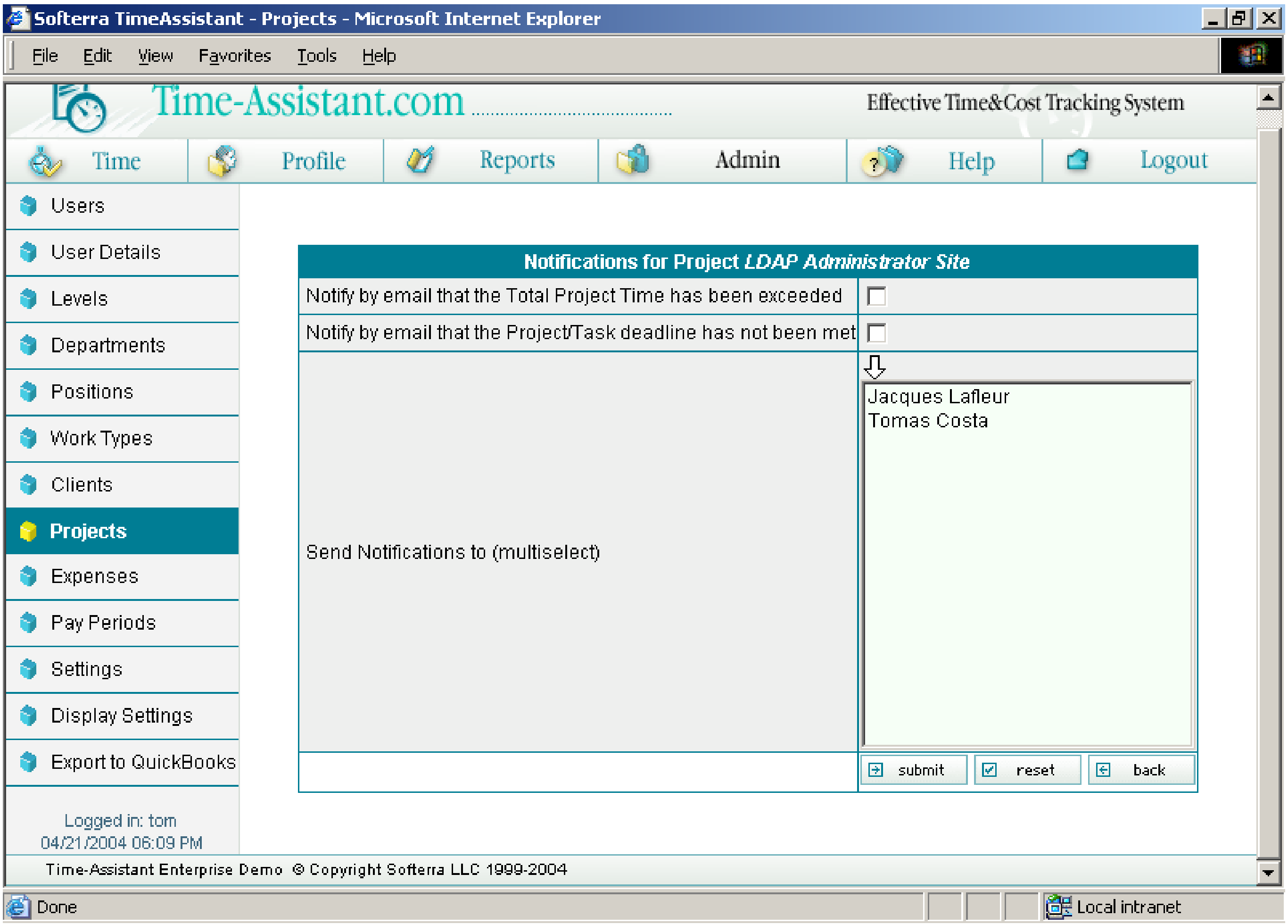
Managing Project Notifications

In the Enterprise version, all Time-Assistant users can be kept updated on a current status of a project they are involved in. This is implemented in the form of email notifications sent to appropriate users when:

- a project or task deadline has been missed
- time estimated for a project or task has been exceeded

The notification mode will get activated as soon as an Employee or Manager adds a new time record to Timesheet (see the following chapter). The application will display a corresponding warning with an option to confirm or cancel (provided the list of persons to be notified for this Project is not empty and someone has been selected), and then, if confirmed, a notification email will be sent to all the persons to be notified with the data saved in the database.

To view the Project Notifications page, click the Notify icon located in the selected project's row inside the Notify column. The following page will be displayed.



Use this page to select notification events along with the persons to be notified (from among Administrators, Managers or Project Leaders). Then click SUBMIT to save changes, RESET – to discard, or BACK – to return to the List of Projects.

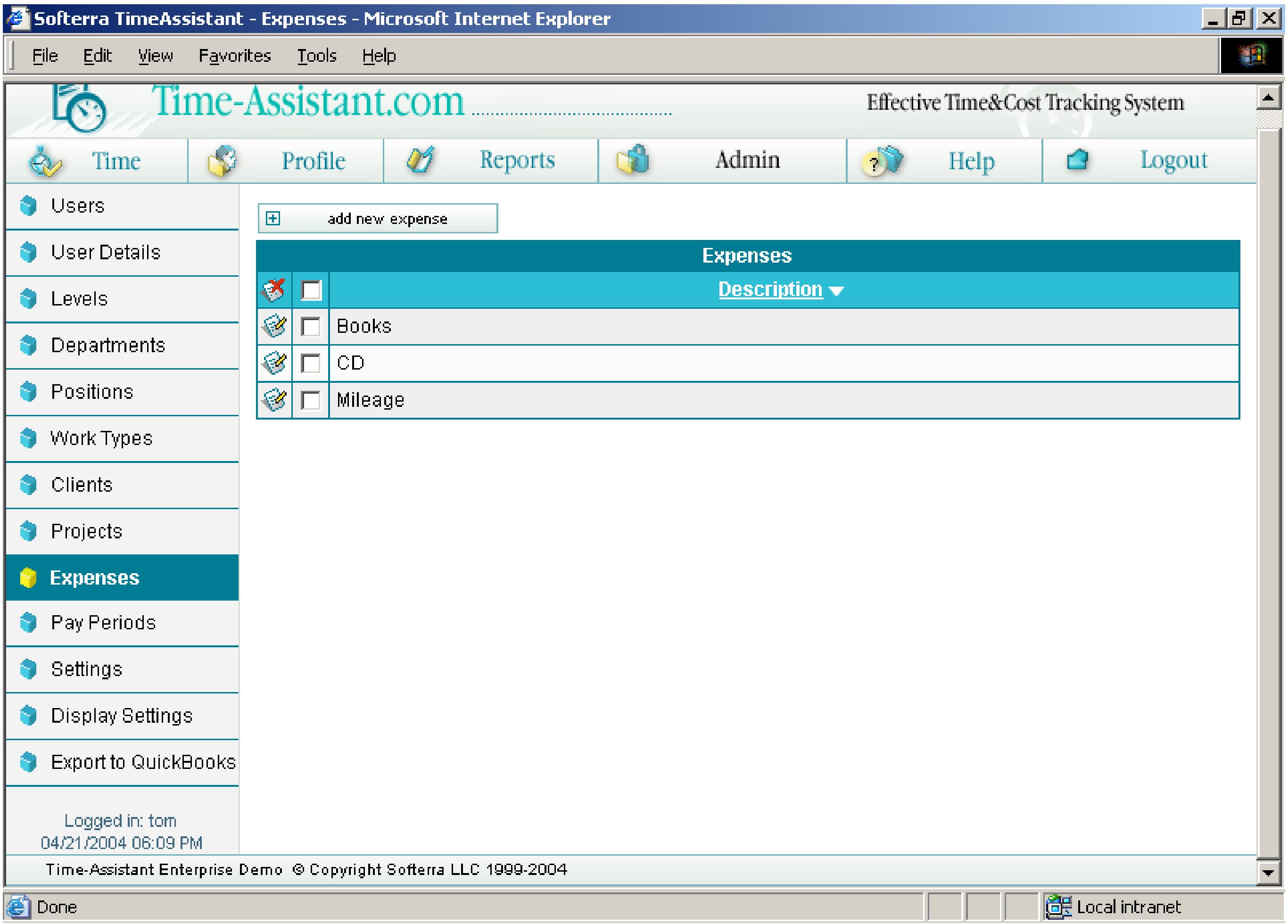
How Do I Make Use of Expenses?

NOTE! Expenses can be toggled from the Application Settings

NOTE! This feature is supported in the Enterprise version only!

The Expenses functionality may be enjoyed by all sorts of Time-Assistant users provided they are expressly permitted to do so by the Administrator.

Here is a sample look at the list of Expenses.

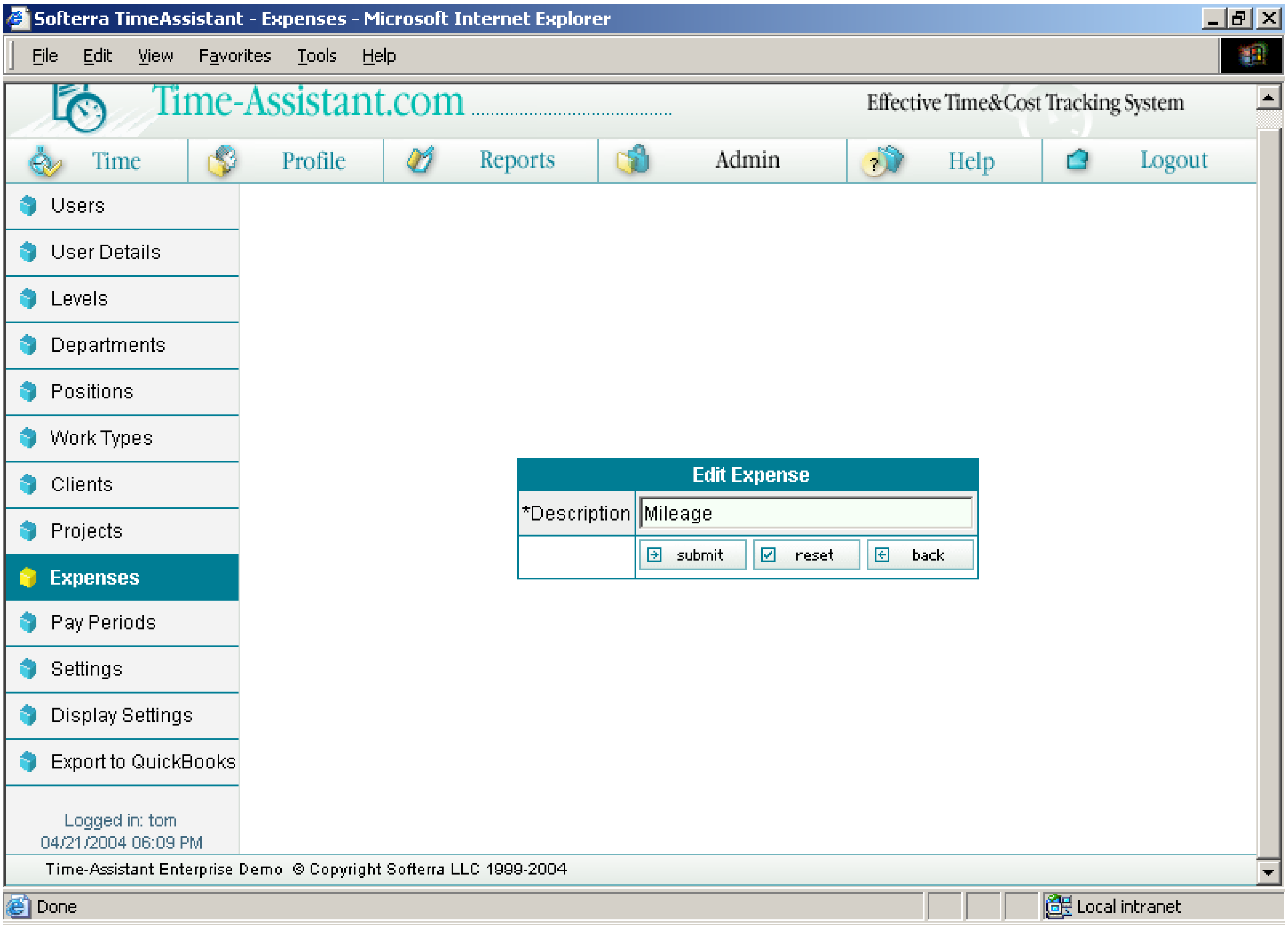


To sort Expenses in ascending/descending order, click the Description title.

To delete an Expense, tick a box next to it and click Delete.

To add an Expense, click the Add New Expense button.

To edit an Expense, just click the Edit icon to the left of its name in the list.


Softerra TimeAssistant - Expenses - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Time-Assistant.com
Effective Time&Cost Tracking System
Time Profile Reports Admin Help Logout
Users
User Details
Levels
Departments
Positions
Work Types
Clients
Projects
Expenses
Pay Periods
Settings
Display Settings
Export to QuickBooks
Logged in: tom
04/21/2004 06:09 PM
Edit Expense
*Description
Mileage
submit
reset
back
Time-Assistant Enterprise Demo © Copyright Softerra LLC 1999-2004
Done
Local intranet

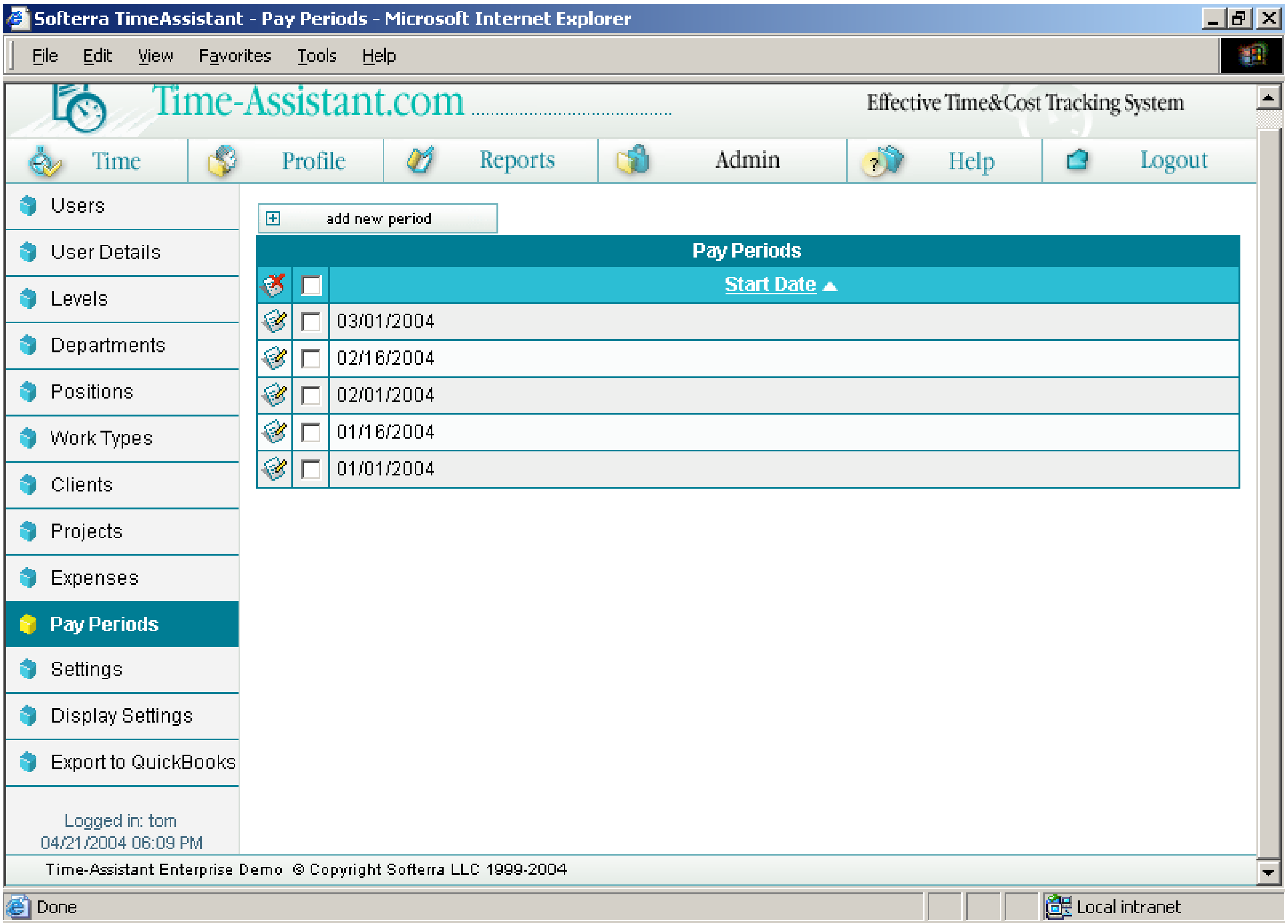
How Do I Handle Pay Periods?

NOTE! The Pay Periods functionality can be toggled from the Application Settings.

A Pay Period is a fixed time interval used to customize the way employees/ clients get paid/charged, if not on a generally used weekly /monthly basis. In other words, the feature is designed to generate more convenient Reports and TimeTrack exactly for the above purposes.

NOTE! It is just the Administrator who is authorized to manage Pay Periods; while Managers and Employees may only see a view-only version of the page limited to just the sorting feature.

Here is what the List of Pay Periods looks like:

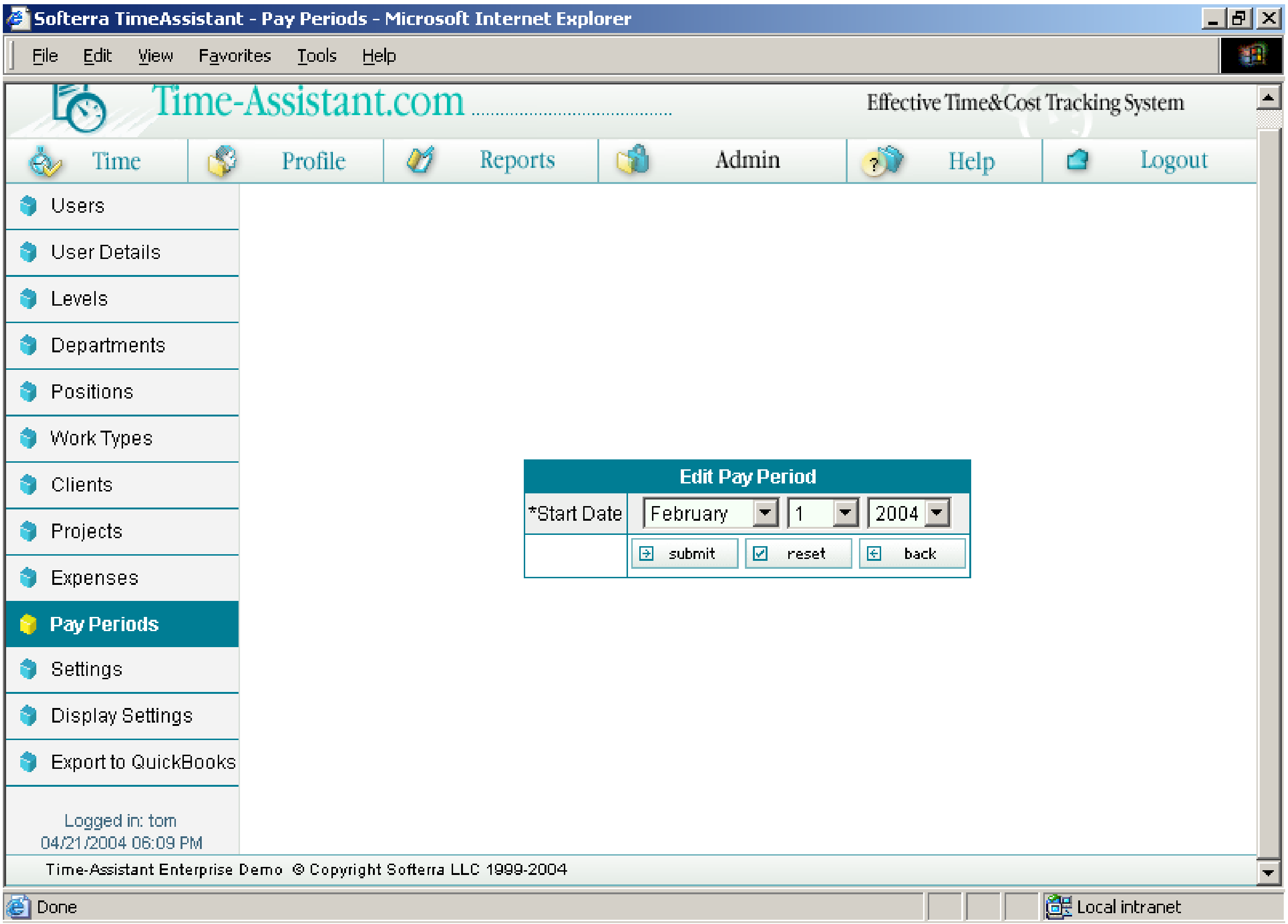


To sort Pay Periods in ascending/descending order, click the title.

To delete a Pay Period, tick a box next to it and click Delete.

To add a new Pay Period, click the ADD NEW PERIOD button.

To make changes to an existing Pay Period, use the Edit icon to the left of a target period to display the following page:



Use this page to enter a Start Date for a new Pay Period. As to an End Date, it'll be determined automatically to become a Start Date of the next Pay Period; or a current date if there are no more Pay periods going after that.

Having entered the desired information, click SUBMIT to save changes, RESET – to discard, or BACK – to return to the List of Pay Periods.

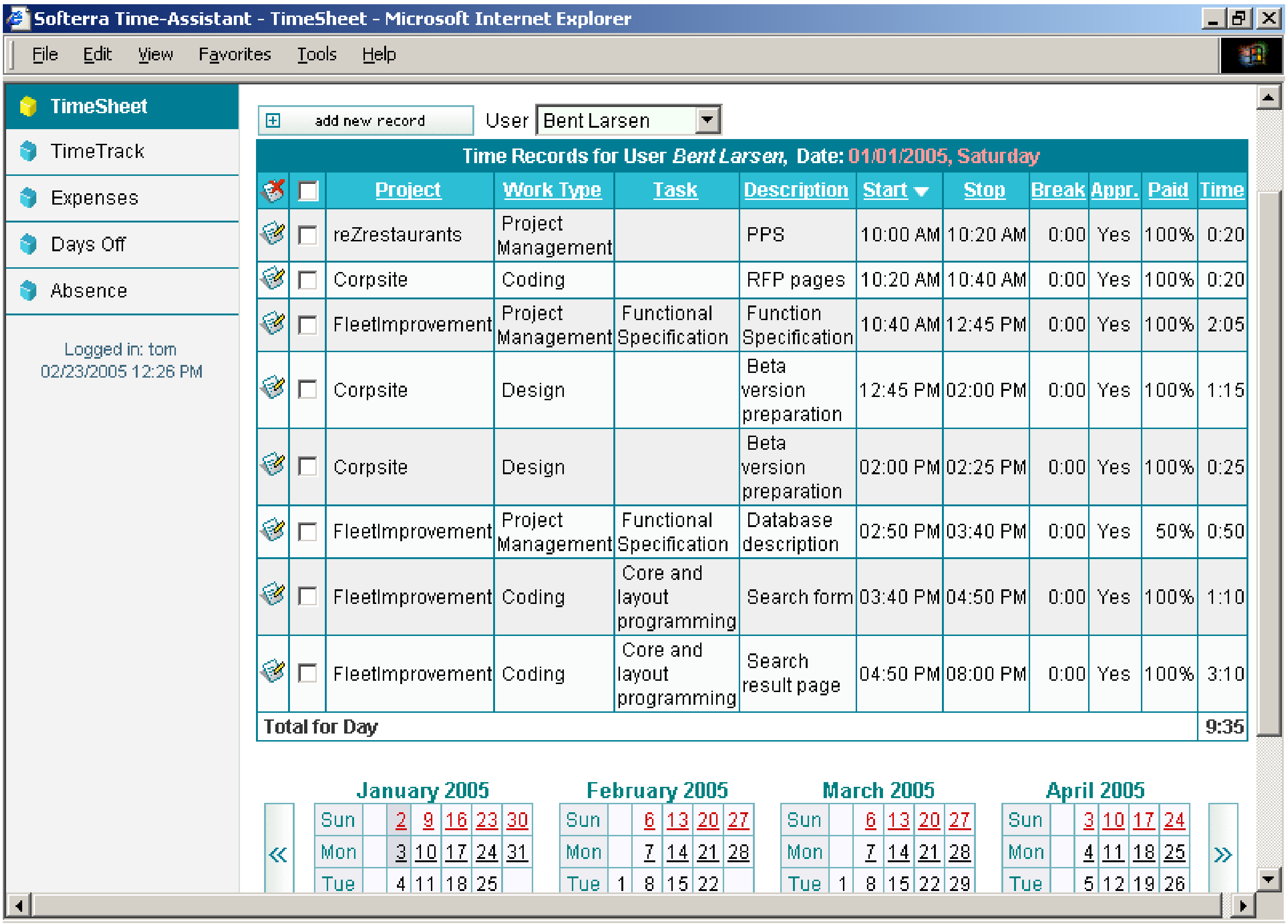
How Do I Calculate Working Time Total?

It is quite natural that time management implies everyday maintenance of time records by employees. Below you'll find what time tracking features Time-Assistant has to offer to its users.

Timesheet Section

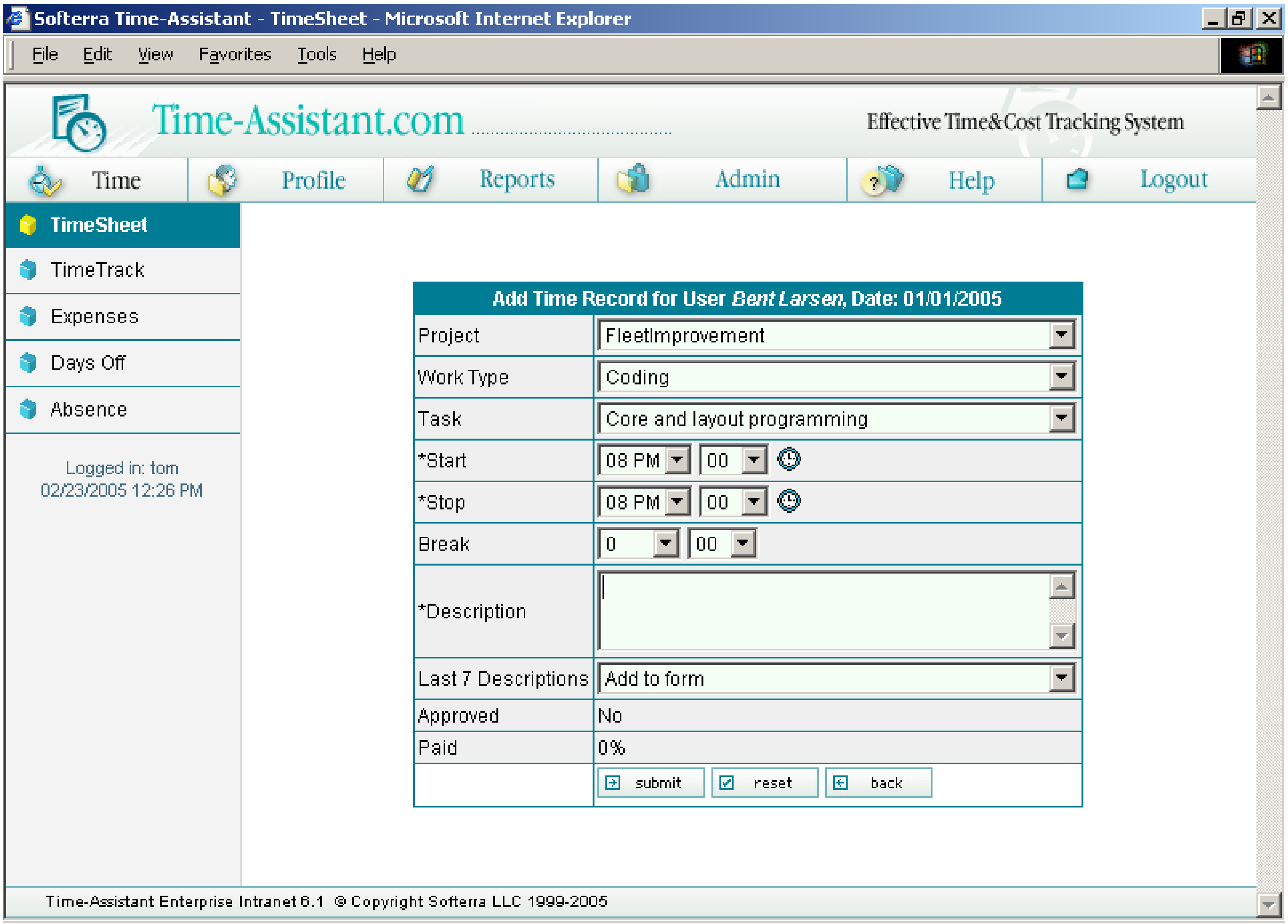
This is the Time-Assistant application main page (preset by default). For all user categories (Administrator, Manager, Employee) it looks identical, except that the 'User' filter includes a different number of users depending on a current user category.

The page displays a period of only four months maximum, starting from January, May or September (the number of months to display along with the Calendar properties can be adjusted via the Display Settings). To move forward or back in time, click the backward/forward arrows on the page's left and right-hand side respectively.



Filling a Timesheet

To add a new time record for yourself (or any one of your subordinate Employees or Managers if you are an application Administrator or Manager), click the Add New Record button located on the Time-Assistant start page to get to the following page:



Use this page to enter the following information:

- Project (the one you're about to enter a record for)
- Work Type
- Start time (hours and minutes)
- End time (hours and minutes)

NOTE! If in the Application Settings the Time Record Format is set to Duration, it means it'll display Duration (hh:mm) instead of Start/End Time.

- Breaks (if enabled and Time Record Format is not set to Duration)
- Record Description (if enabled)
- Task (if enabled)

If the Approval feature support is enabled in the application Settings, you'll be able to view the following:

- Record approval status ('Yes/No' view-only, if enabled)
- Extent of payment for work done (in %, view-only, if enabled)

(For more details, please consult the 'How Do I Administer Approvals?' section).

The period during which Employees are entitled to change their timesheet information gets set by Administrators or Managers on the User Rights page.

NOTE for Empoyees and Managers! If one of the notification events for a selected Project ('task/project deadline not met' or 'project completed') has occurred prior to your submitting your time record, the application will display a corresponding warning with an option to confirm or cancel (provided the list of persons to be notified for this Project is not empty and someone has been selected), and then, if confirmed, a notification email will be sent to all the persons to be notified with the data saved in the database.

To edit an existing time record of yours (or of any other user if you are an administrator or a supervising manager), click the Edit icon to the left of the selected record's name.

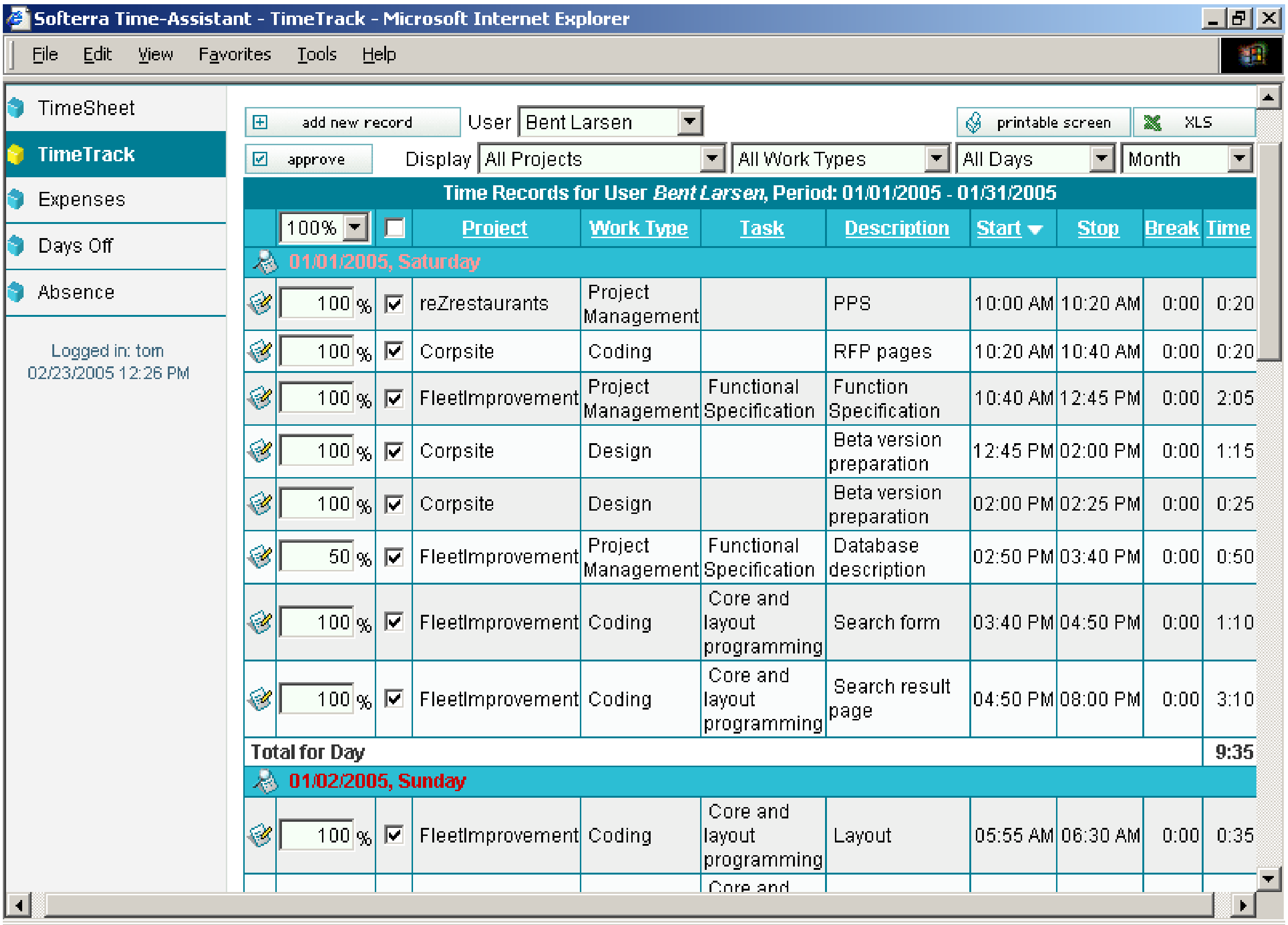
Both the Project and the Work Type of the time record submitted last will appear automatically in the next time record, with the end time of the previous record becoming the start time for the next one to go.

TimeTrack

On the TimeTrack page, the Administrator and Managers can view time records of their subordinate users for a standard period of time – a week, a month or, alternatively, for a preset Pay Period. Employees can view time records of their own and submit their TimeTrack for approval, as well as view time records of Employees whose TimeTracks are allowed to be viewed for them. (The Approval procedures are described in the 'How Do I Administer Approvals?' section).

To have a user Timetrack displayed for a certain time period, choose a name and a period from the dropdown selects located in the page's upper part and then click on any date within a target period.

Administrators and Managers may also approve upon their subordinate user TimeTracks and assign payments in accordance with the TimeTrack records.



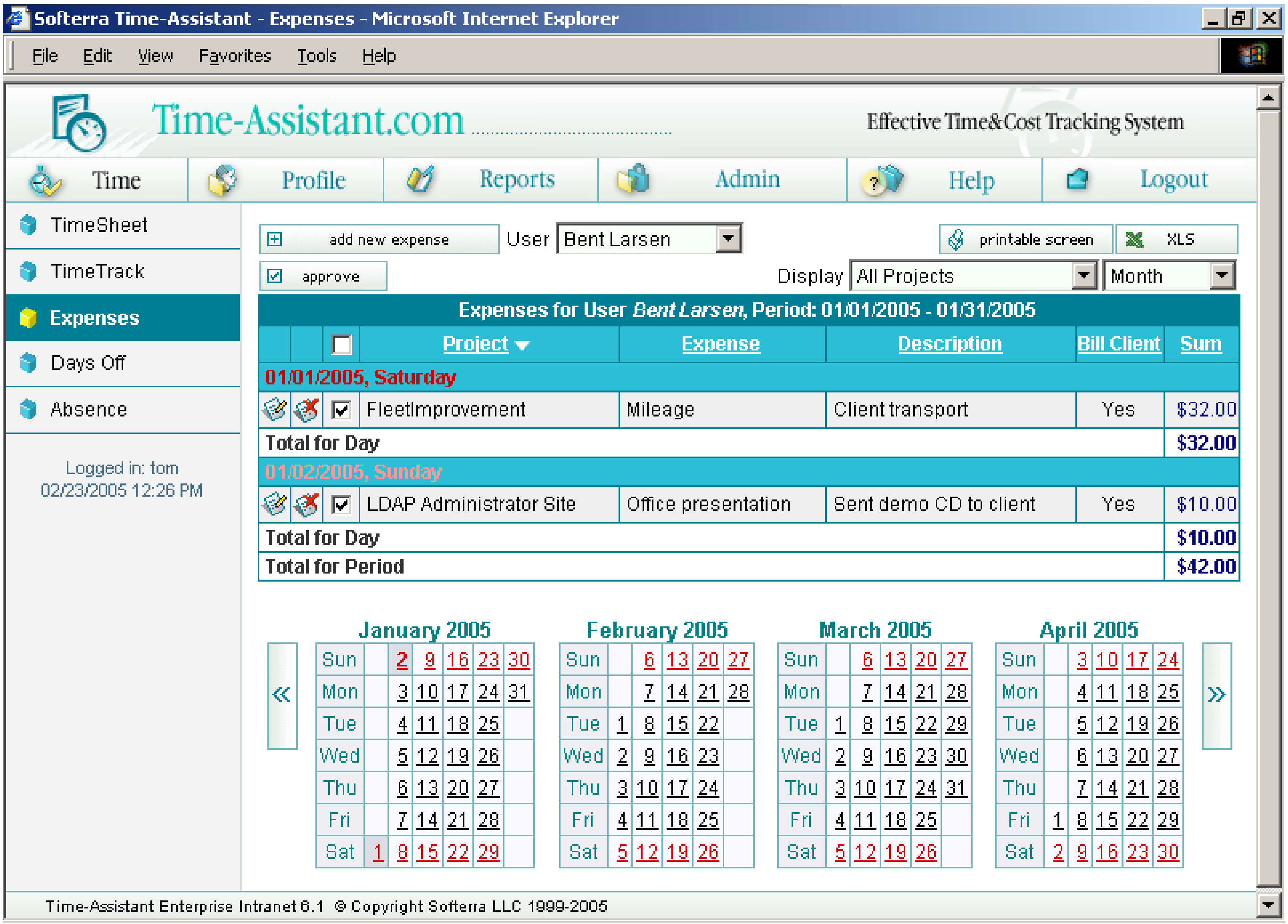
To export a TimeTrack to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

Accounting Expenses

On the Expense Track page, the Administrators and supervising Managers can also view expense records entered by their subordinate users for a standard period of time – a week, a month or, alternatively, for a preset Pay Period, while Employees can only view expense records of their own and submit their Expenses for approval, as well as view expense records of Employees whose TimeTracks are allowed to be viewed for them. (The Approval procedures are described in the 'How Do I Administer Approvals?' section).

To have a user Expense Track displayed for a certain time period, choose a name and a period from the dropdown selects located in the page's upper part and then click on any date within target period.

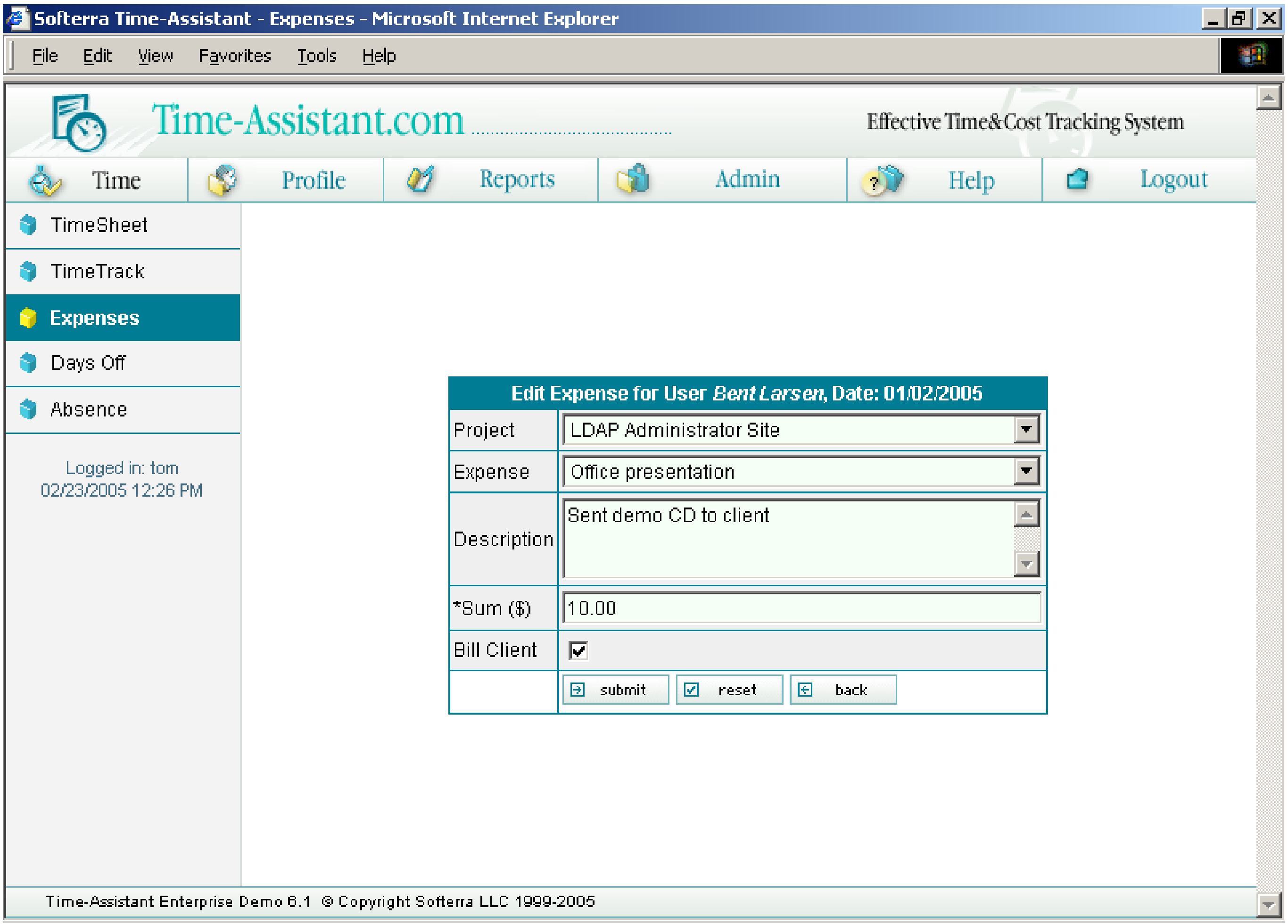
Administrators and Managers may also approve upon their subordinate users' Expenses.



To export Expenses to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

Adding/Editing Expenses

To add a new Expense record for yourself (or any one of your subordinate Employees and Managers if you are an application Administrator or a supervising Manager), click the Add New Expense button located on the Expenses page. The following page will display:



Use it to enter the following information:

- Project (the one you've entered your record for)
- Expense
- Record Description (if enabled)
- Money value
- Whether the record is to be included in the invoice to client

To edit an existing Expense, use the Edit icon to the left of a target expense to display a page very similar to the above, except that it will already contain information previously entered, rather than the default values (those of the last added expense).

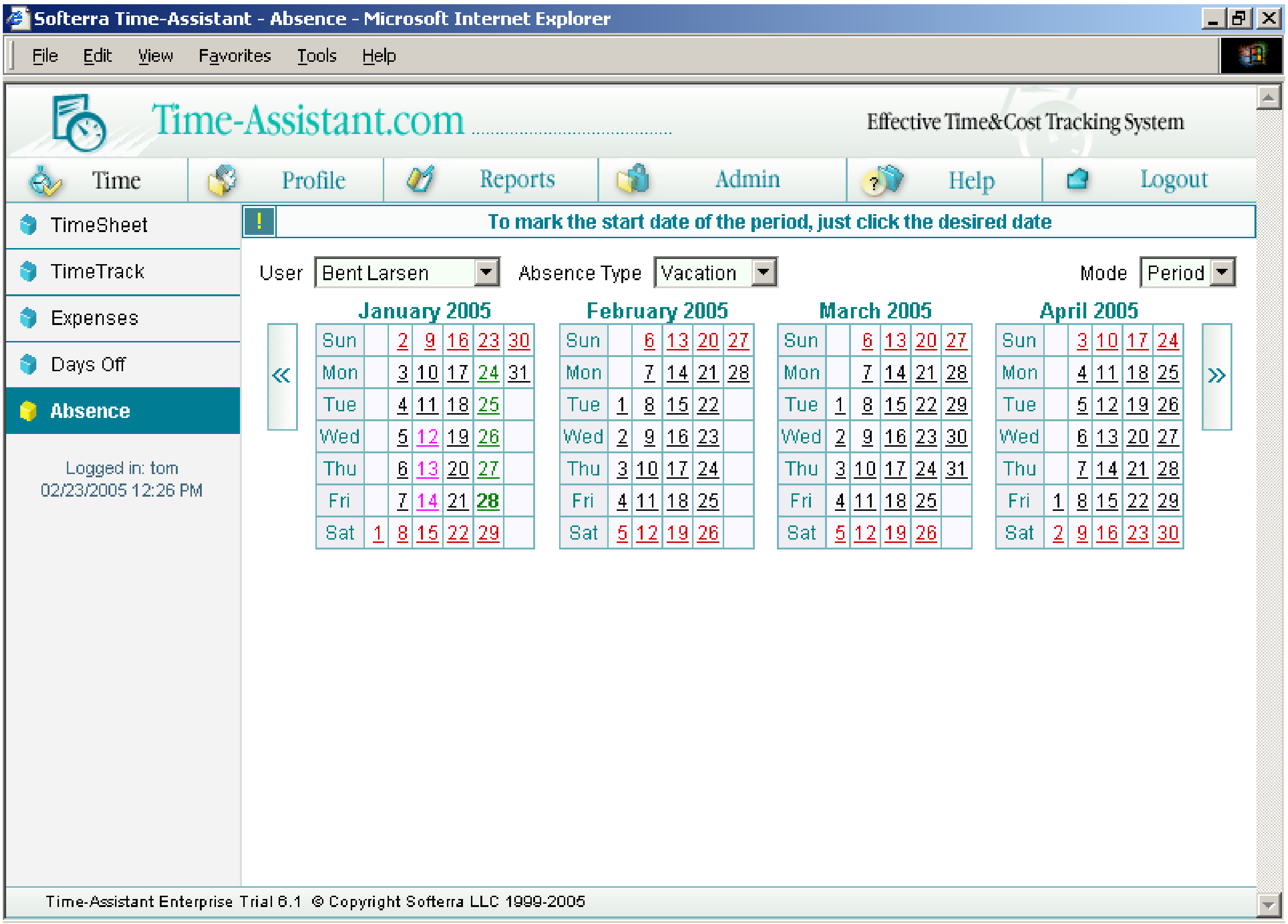
After you have added a new expense or edited an existing one, click SUBMIT to savechanges, RESET – to discard, or BACK – to return to the List of Expenses.

NOTE! A time interval when Employees are allowed to edit their existing expense records, is set by the Administrator or a supervising Managers on the User Permissions page!

Accounting Absences

On the Absence page, the Administrators and supervising Managers can highlighting user absence days (vacations, sickness, traveling) for their subordinate users, while Employees can only highlighting absence days of their own. To mark or unmark a date or period, one should specify absence type and selection mode and click a desired date.

Note: absence days have a higher priority than days off when are displayed in a calendar.



How Do I Administer Approvals?

NOTE! This functionality is only supported in the Enterprise version!

Each TimeSheet record may be approved or disapproved upon by the Administrator or a duly authorized supervising Manager. Besides, they may assign an extent to what they believe an employee should be paid for a particular kind of work.

Let's assume some employee named John Doe has added the following new record:

- Duration - 3 hours;
- Work Type - Coding.

We also assume that his rate for the given Work Type is 40$ per hour. Now one of his supervisors need to decide whether or not to approve upon this record, and, if they do, assign an extent to what this work should be paid for (in percent). Suppose they've assigned just 50% - in this case John Doe's salary for this record will amount to 3*40*0,5=60$. If this record is rejected, the extent of payment assigned will automatically be set to 0%, meaning no dough for John Doe.

Here is the basic order of operation inside this section:

Employees and Managers who require approval for their time records, first need to press the 'Submit for Approval' button on their TimeTrack page. This will initiate submission of the whole timetrack via a notification for all Time-Assistant users authorized to view the given user's TimeTrack. To the Administrator and supervising Managers such notification (saying that the TimeTrack is filled and requires approval) may look like one of the following:

- A supervisor's TimeTrack page will display the Submit Date along with the name of a person who requires approval in the left-hand side bottom corner of the screen;
- The TimeTrack Approval Report page will display a new record containing the same information (to be updated every time the user resubmits the TimeTrack).

So, to approve upon a TimeTrack, tick a box next to a target time record of those submitted on the TimeTrack page and press the Approve button. To get to the TimeTrack page displaying detailed information for a selected period, click one of the submitted time period links at the TimeTrack Approval Report page.

In addition to approvals or rejections of TimeTrack records, the Administrators and supervising Managers can also set an extent to what the records logged should be paid (in percent).

A similar technique is used for Expenses.

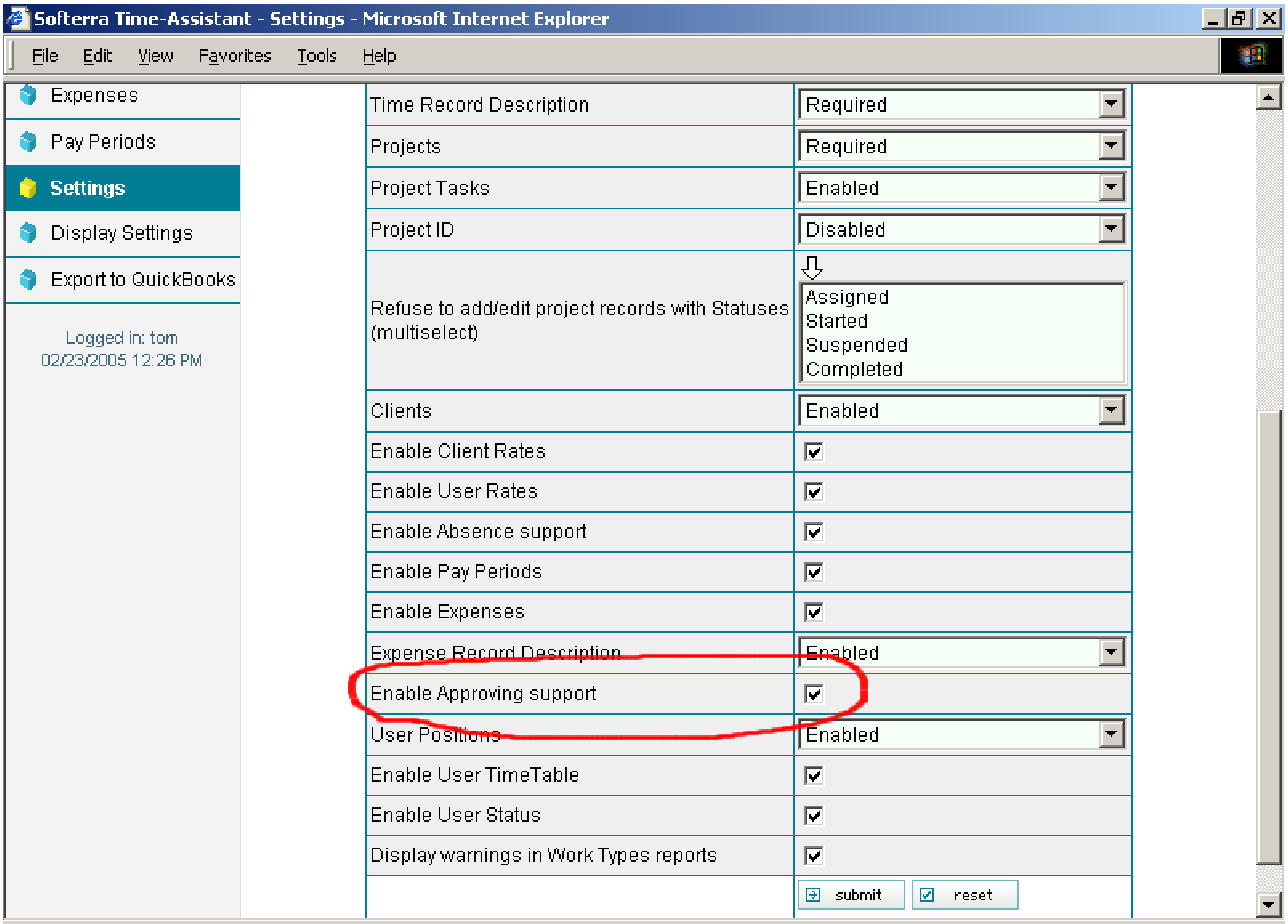
Toggle Application Approvals

NOTE! Approvals can be toggled from the Settings for the whole application!

NOTE! It is just the Administrator who's authorized to edit this setting.

If we assume that Approval for the whole application are disabled, then:

- The Approval and Payment columns will not be displayed on the TimeTrack, TimeSheet and all appropriate Report pages
- The Approval column will not be displayed on the Expenses page
- The ‘Submit for Approval’ button on the TimeTrack and Expenses pages for Employees and Managers will not show
- The ‘Approve’ navigation panel button will be hidden
- Each new Timesheet record will automatically have the ’Approved’ Status assigned to it with the Payment extent always equaling 100%
- Each new Expenses record will automatically have the ’Approved’ Status assigned to it

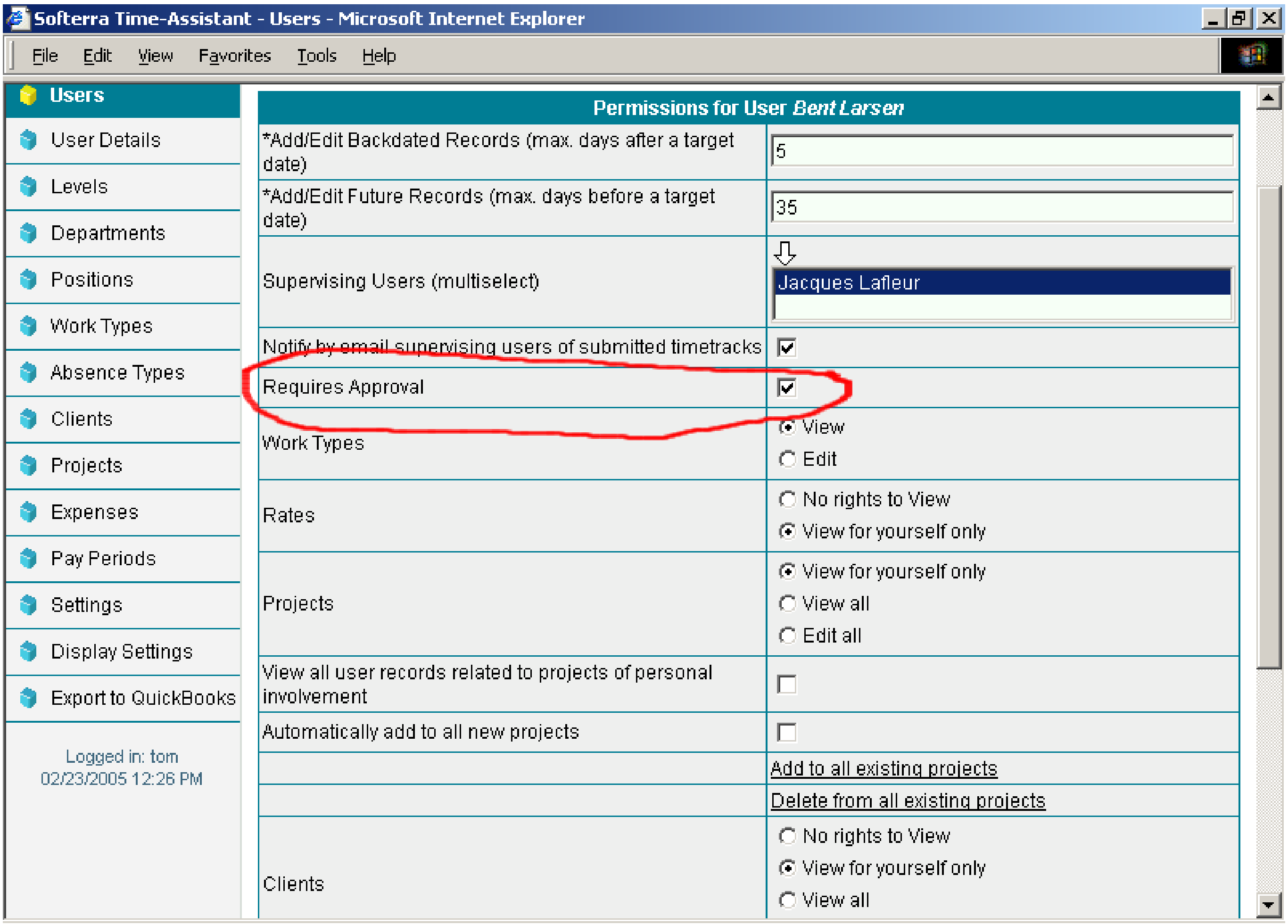


Toggle User Approvals

The “Requires TimeTrack Approval” attribute may be assigned to each Employee and Manager. The Approval support can be enabled/disabled from the User Rights page and only Administrators and Managers with appropriate rights are authorized to do that.

If the Approval support for an Employee or Manager is disabled:

- Administrators and Managers will not need to approve this user TimeTrack
- The ‘Submit TimeTrack for Approval’ button on the TimeTrack page for such user will be hidden
- For each new Timesheet record for such user the “Approved” Status is assigned automatically and the Payment extent is set to 100%



How Do I Submit My TimeTrack for Approval

Any Employee looking to get a TimeTrack approval, needs to submit it for approval for the whole of one of the standard time intervals periods provided – a week, a month or pay period.

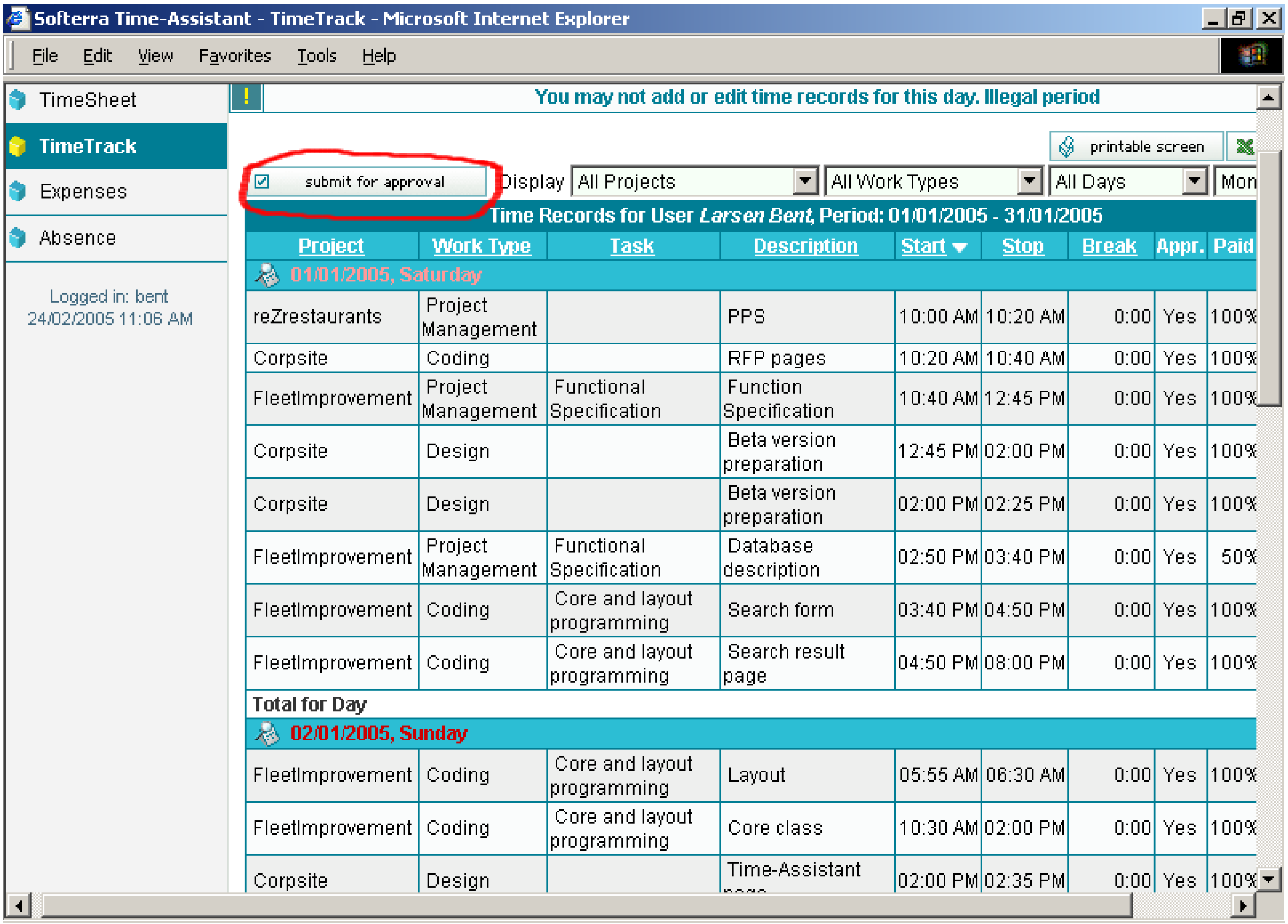
This is done by clicking the '<u>Submit TimeTrack for Approval</u>' button located right above the TimeTrack itself a little bit to the left.

NOTE! This button will not be displayed to Employees who do not require Timetrack approval!

The Administrator and supervising Managers can approve upon TimeTracks regardless of whether or not they have been submitted. Submission implies a notification sent to other Time-Assistant users saying that the TimeTrack is ready for an approval.

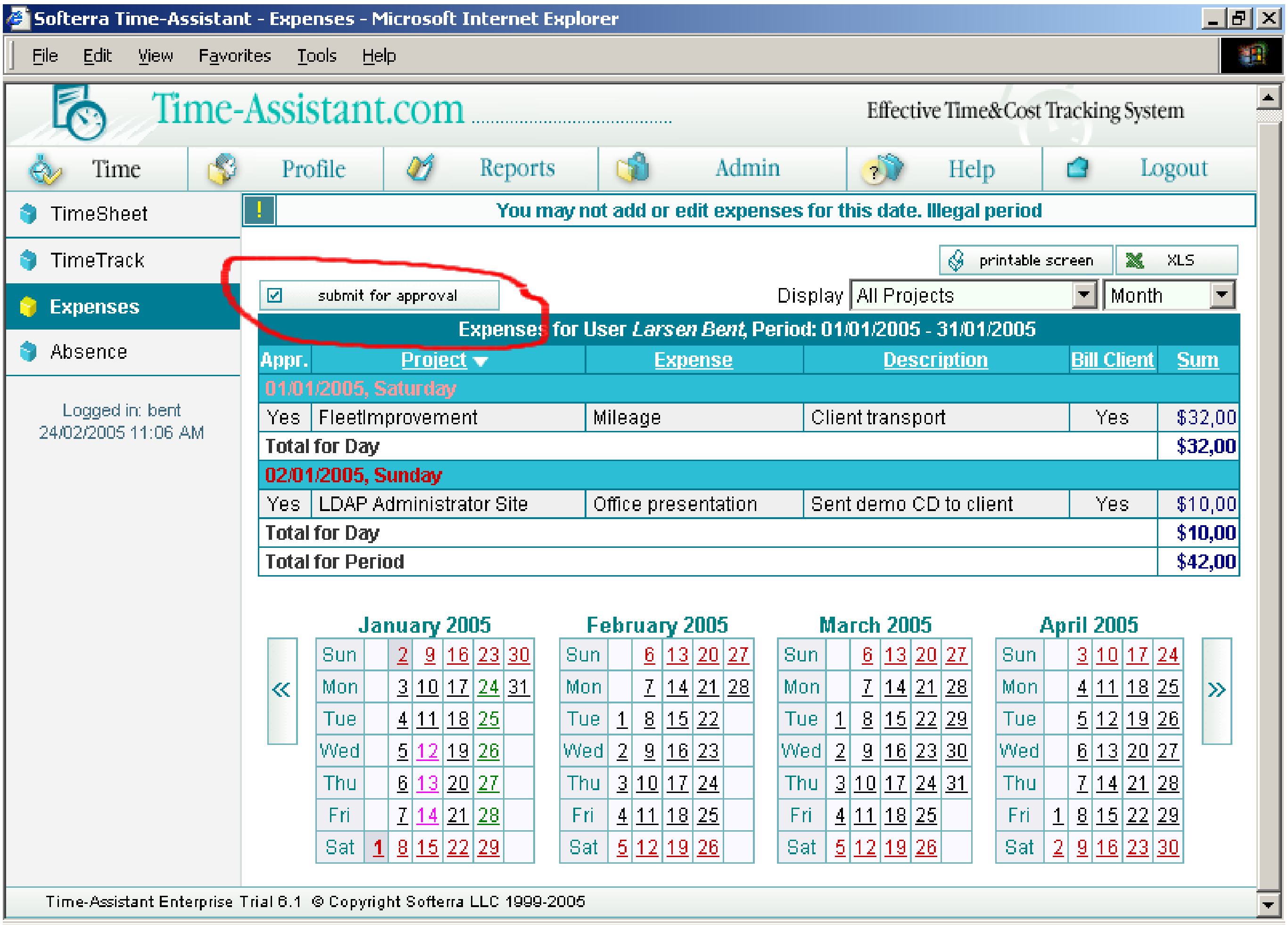
Also it is possible to resubmit a TimeTrack after it's already been approved by a supervisor. This may be required when e.g. an Employee decides to make changes to some records after submitting them for approval.

Following a TimeTrack submission, the user page will display the Submit Date along with the name of a person who requires approval in the left-hand side bottom corner of the screen. Plus the TimeTrack Approvals page will also have a new record added. (See the TimeTrack Approval Report description below).



How Do I Submit My Expenses for Approval

Expenses get approved in a very the similar way to Employee TimeTracks. Please have a look at the screenshot below.

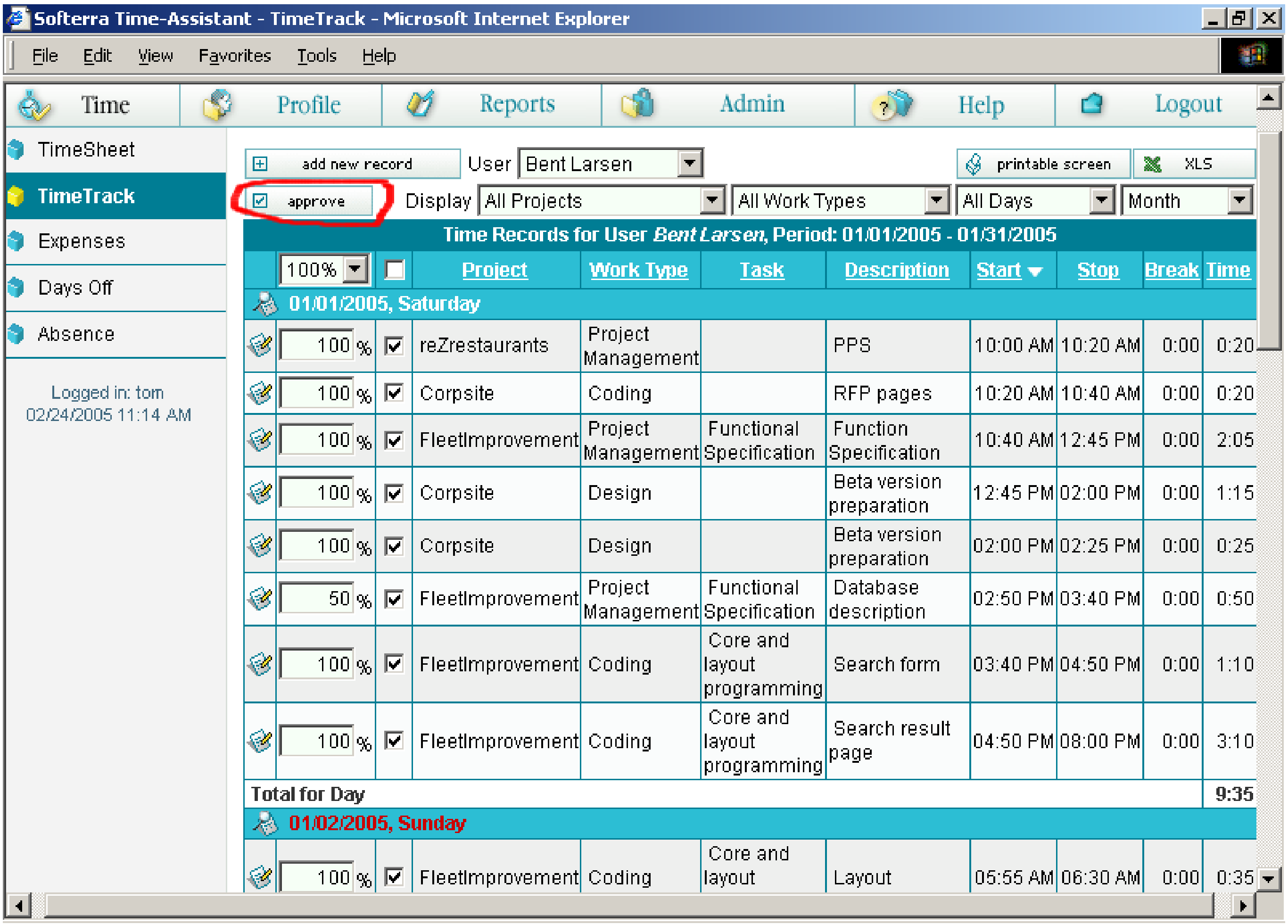


How Do I Approve a TimeTrack

A TimeTrack may get an approval for one of the two standard time intervals – a week or a month. If you are a person authorized to approve upon TimeTrack records, go to the TimeTrack page, select a user, a time interval to be approved, tick a box next to a target record, assign a payment percentage and then click the Approve button. After a TimeTrack is approved, a corresponding record for a time period to be approved will appear on the Approval Report page. (See the Approval Report description below).

NOTE! It is just the Administartor and supervising Managers who have authority to approve upon TimeTrack records of Employees and Managers looking for approval. The Administrator can do it for any user; while a Manager – for SUBORDINATES only.

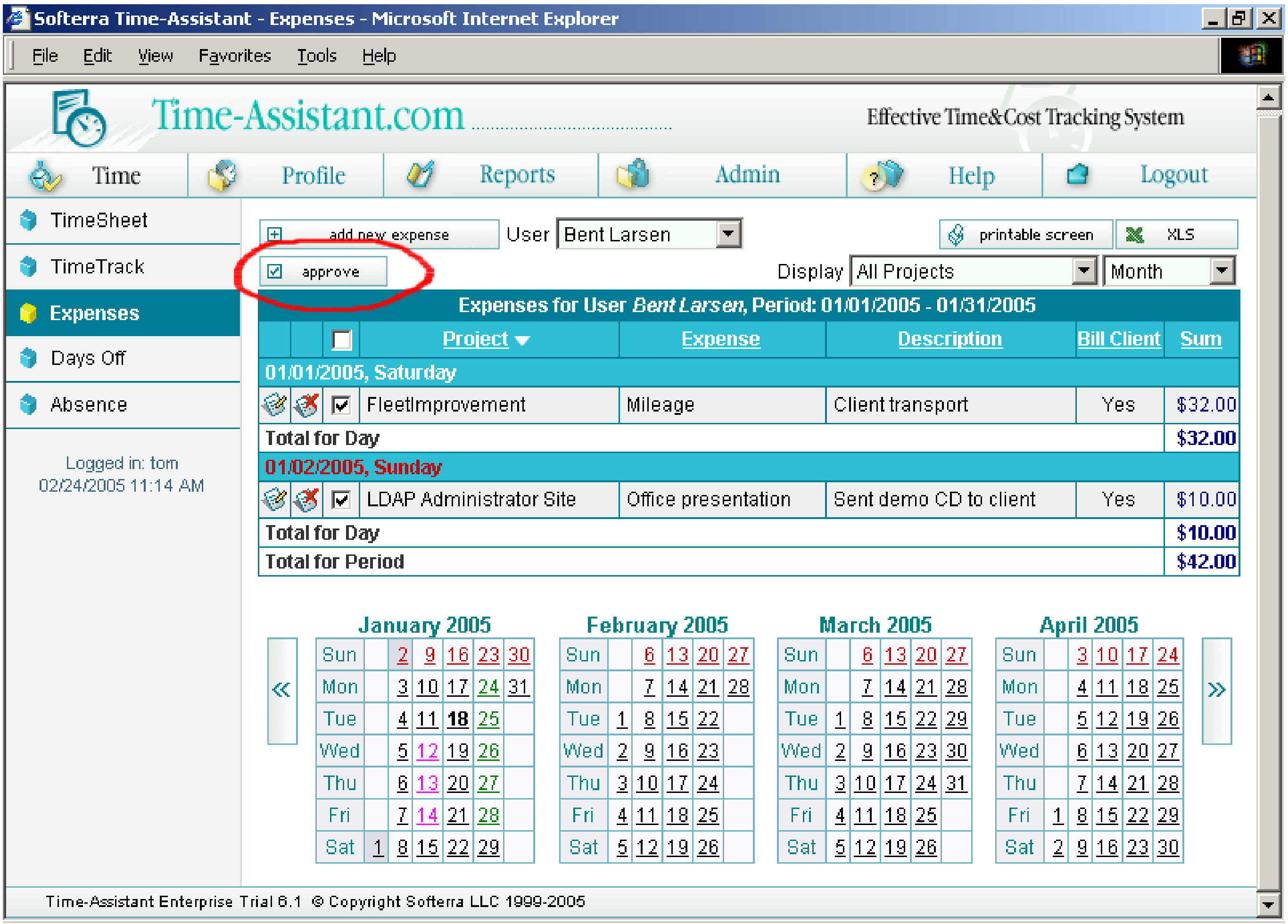
NOTE! Emloyees and Managers who do require approvals, have no permission to change the already approved records in their TimeSheet.



How Do I Approve Expenses

Expenses get approved in a very the similar way to Employee TimeTracks. The only difference here is no ability to set payment percentage for expense records, making it 0% or 100 % for all of them.

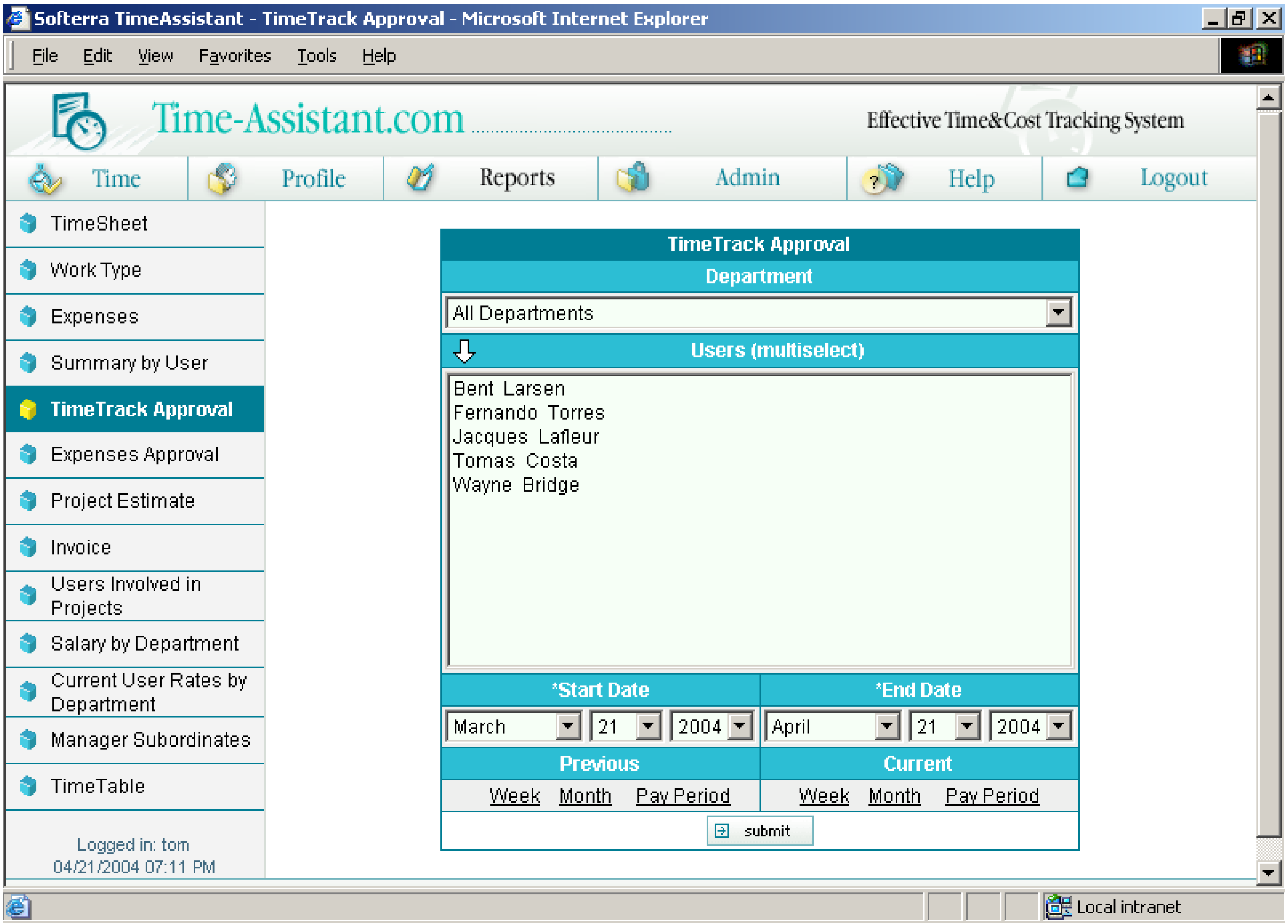
Please have a look at the screenshot below.



Timetrack Approval Report

The Administrator can generate this kind of report on any one or more users, while Managers - on just one of their SUBORDINATE Employees or Managers. As to Employees, they can get a report on themselves or the Employees whose TimeTracks are available to everyone.

In order to have the application properly generate a TimeTrack Approval report, one first needs to select users from the box. Then choose a time period and click SUBMIT to confirm selection.

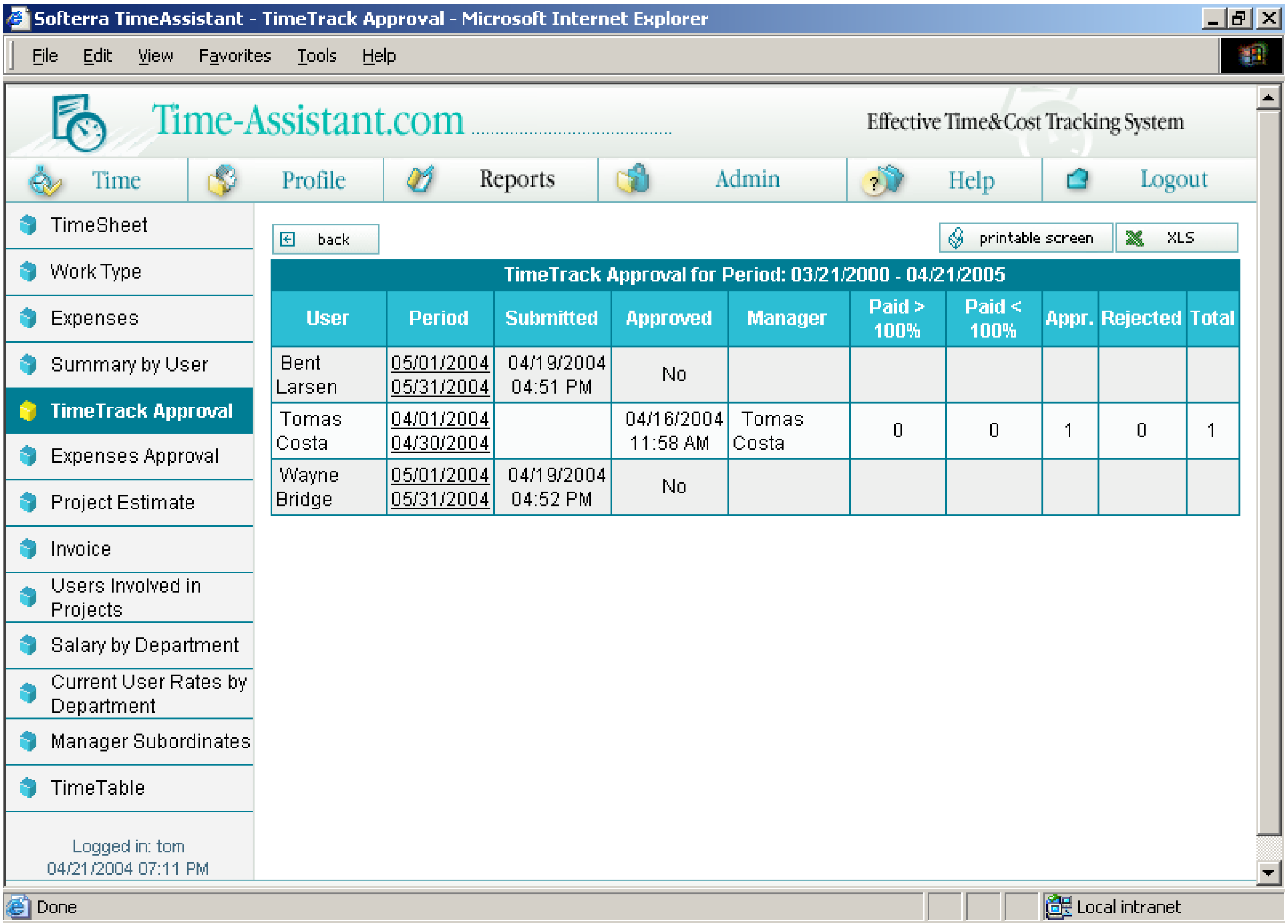


*

This report displays the following information:

- User Name
- Time interval to be approved upon
- Submit (Resubmit) date
- Date of approval and name of an approving person
- Number of records approved
- Number of records rejected

- Number of records approved with a payment extent of more than 100%
- Number of records approved with a payment extent of less than 100%

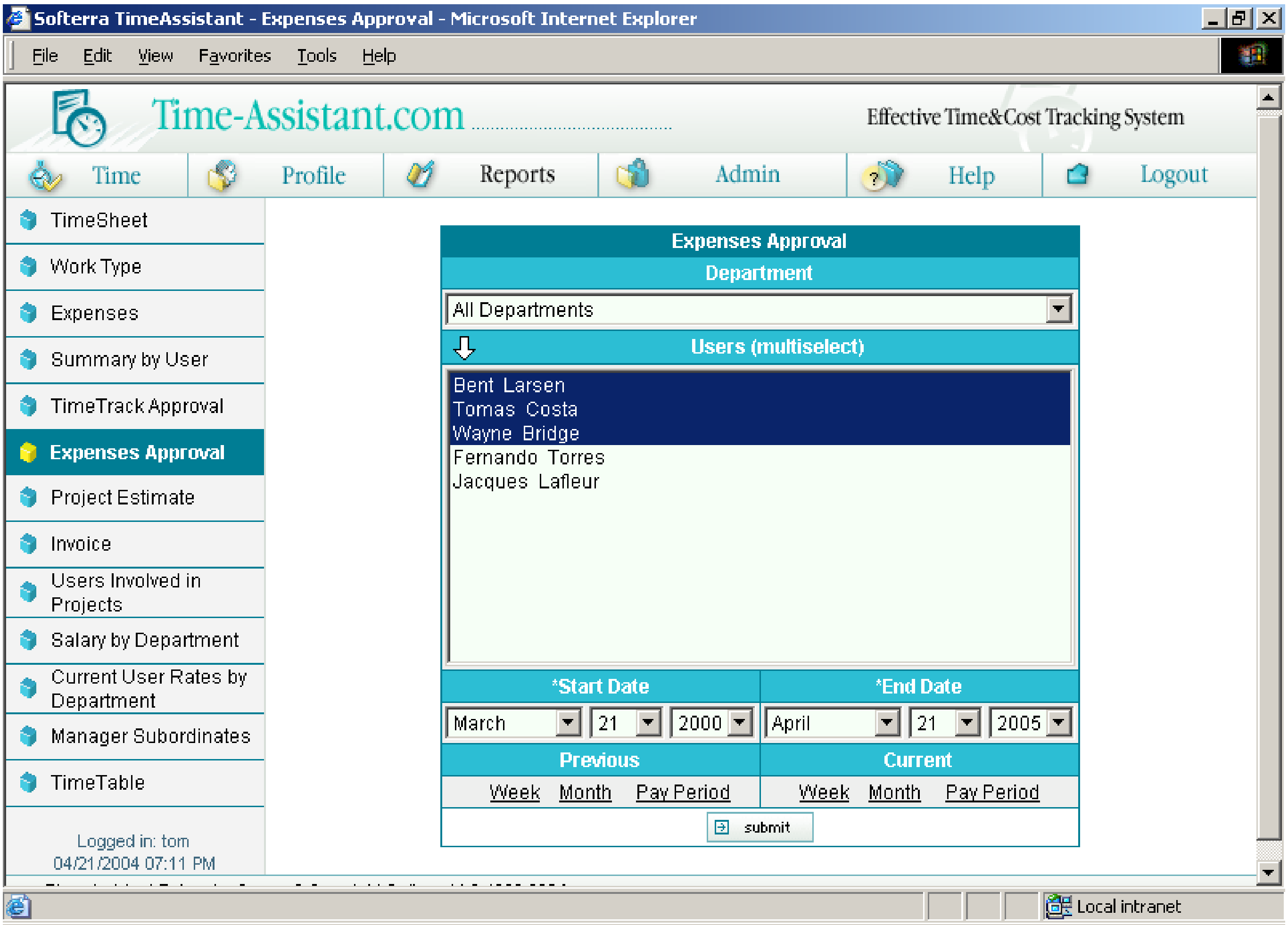


To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

Expenses Approval Report

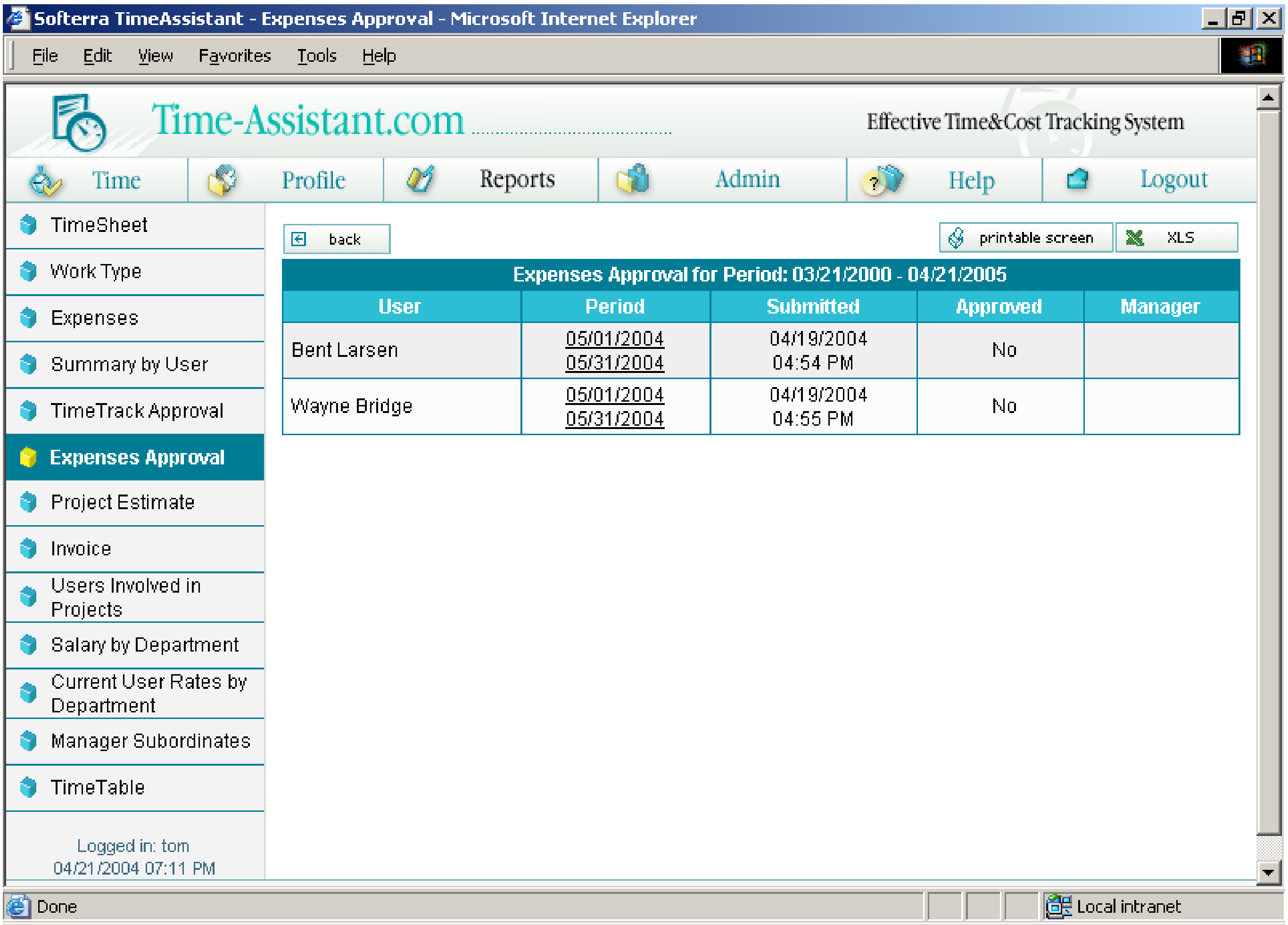
The Administrator can generate this kind of report on any one or more users, while Managers - on just one of their SUBORDINATE Employees or Managers. As to Employees, they can get a report on themselves or the Employees whose TimeTracks are available to everyone.

In order to have the application properly generate a Expenses Approval report, one first needs to select users from the box. Then choose a time period and finally click SUBMIT to confirm selection.



This report displays the following information:

- User Name
- Time period to be approved upon
- Submit (Resubmit) date
- Date of approval and name of an approving person



To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

How Do I Generate a Report?

All Time-Assistant users have different sets of reports available to each of them based on personal permissions preset by the Admin.

In order to get to a page featuring all the reports available to you in particular, click the REPORTS menu item.

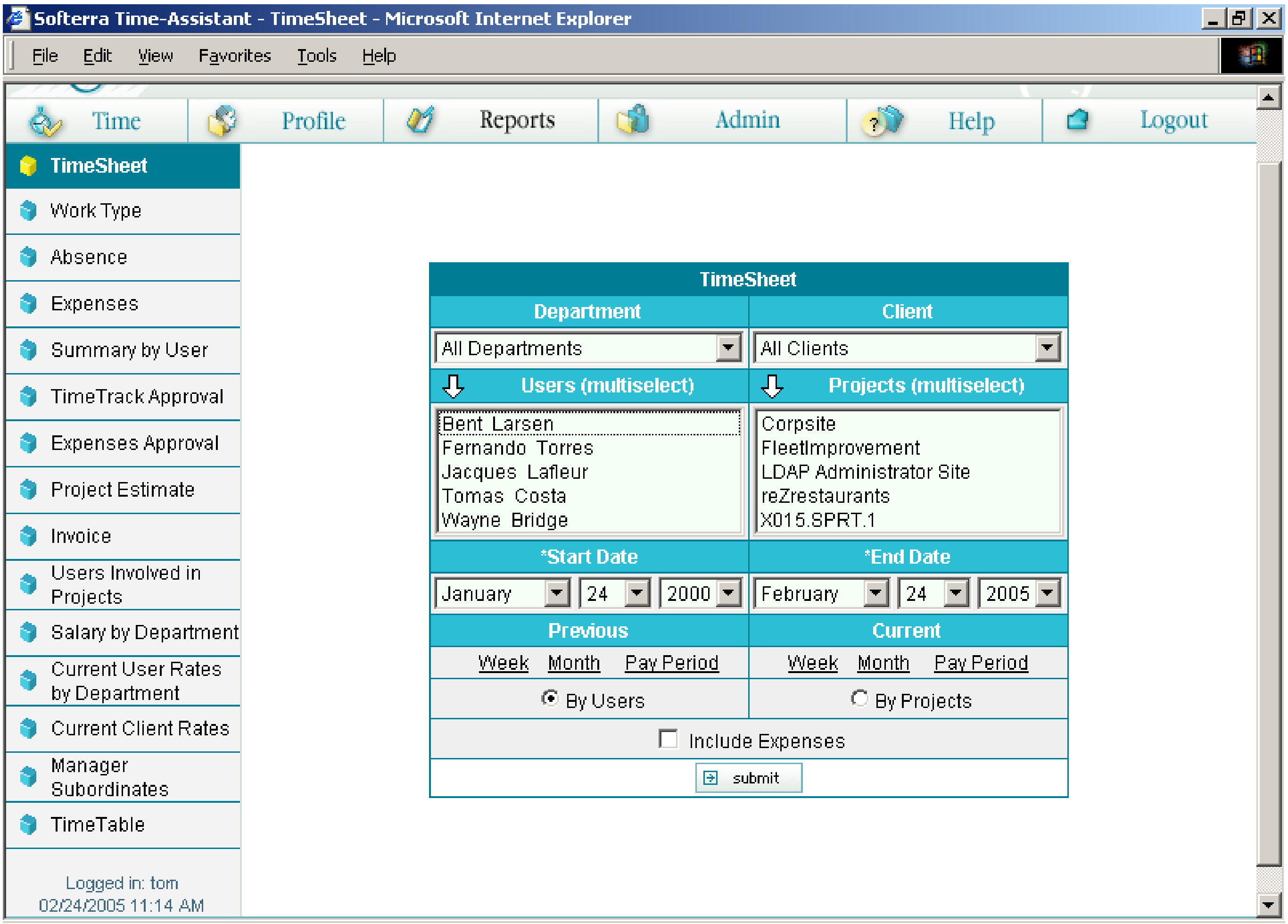
All Reports are available in a printable form. (Use the PRINTABLE SCREEN button for this purpose).

Timesheet Report

This kind of report can be available to any Time-Assistant user. However, its functionality may vary depending on what sort of permissions a person generating the report possesses.

A chart below features what sort of information a Timesheet report will contain if generated by a representative of each of the Time-Assistant user categories.

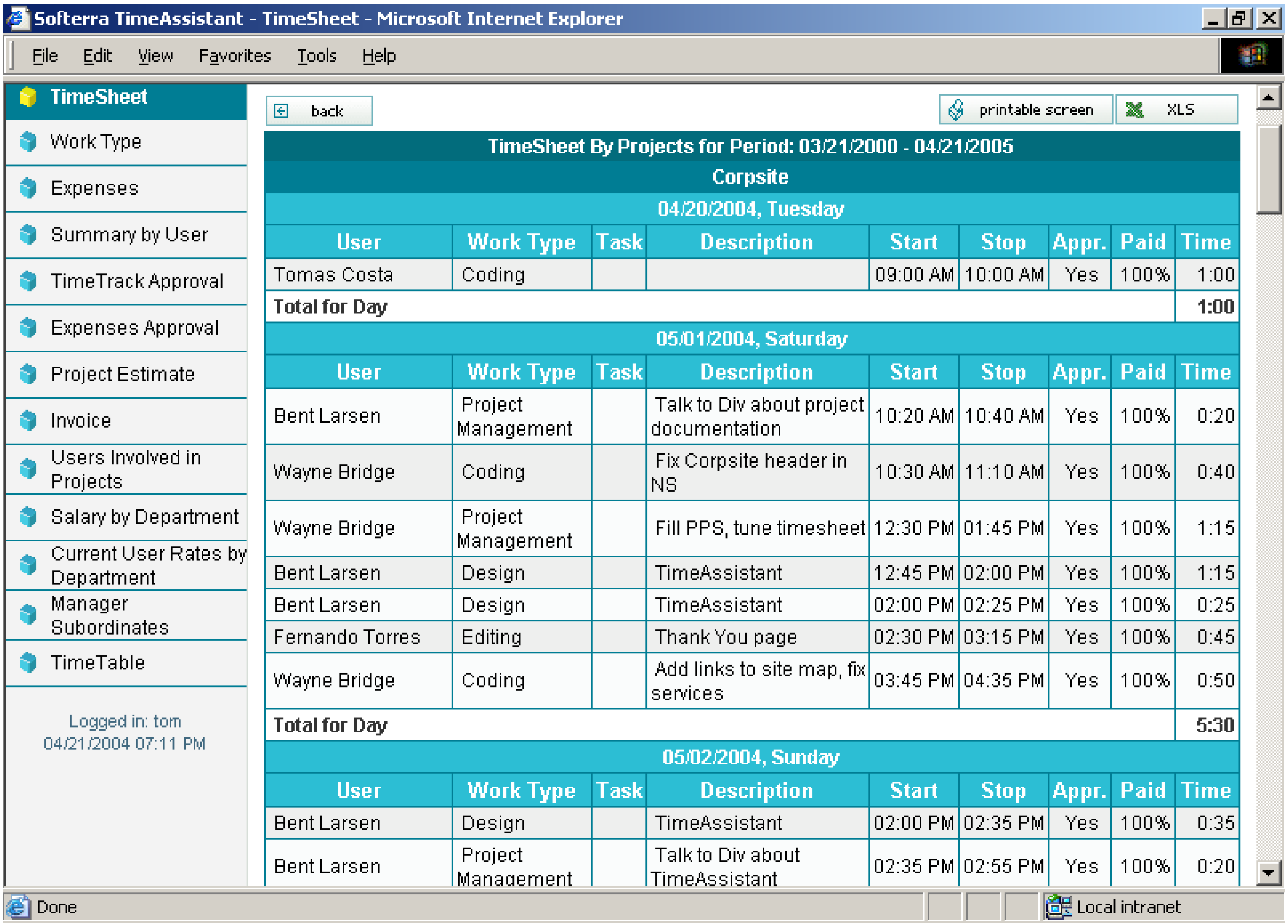
Administrator	Manager	Employee
Unlimited functionality – the report may include information on any project/user	Information on projects of personal involvement and on any SUBORDINATE user (Employee or Manager)	Information on projects of personal involvement and on other Employees, whose TimeTracks are available for viewing



The Timesheet report is generated using the page shown above. To do it, one needs to choose a project(-s) from a select box on the left and employees – from the other one on the right (multiple selection available). Then set a sorting mode (either ‘by Projects’ or ‘by Users’) and a time interval, and finally click SUBMIT to confirm selection.

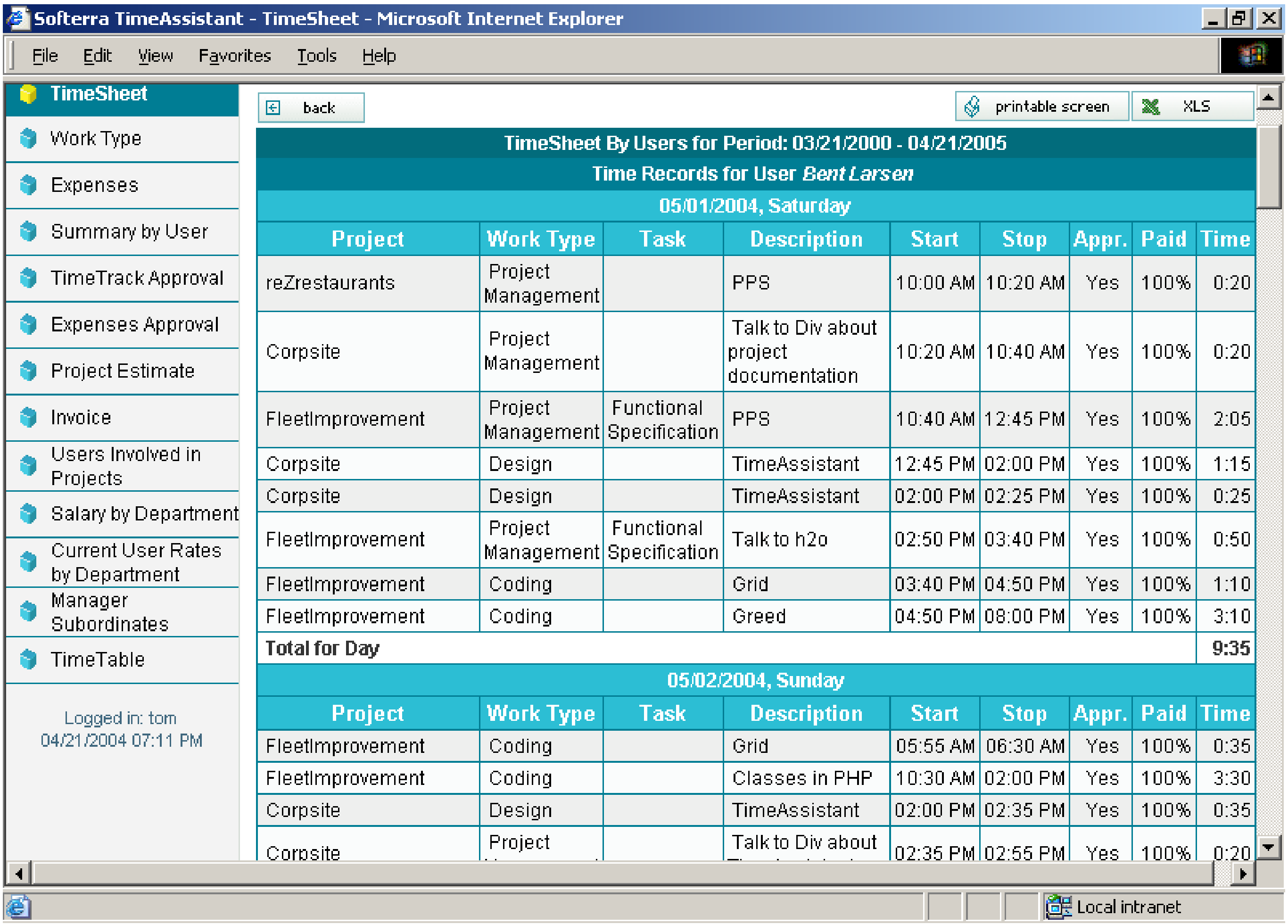
NOTE! If the "Include Expenses" checkbox will be checked, the reports are going to display with expenses information.

‘Users by Project’ Timesheet Report for a specified period (year, month, week, etc.)



TimeSheet By Projects for Period: 03/21/2000 - 04/21/2005								
Corpsite								
04/20/2004, Tuesday								
User	Work Type	Task	Description	Start	Stop	Appr.	Paid	Time
Tomas Costa	Coding			09:00 AM	10:00 AM	Yes	100%	1:00
Total for Day								**1:00**
05/01/2004, Saturday								
User	Work Type	Task	Description	Start	Stop	Appr.	Paid	Time
Bent Larsen	Project Management		Talk to Div about project documentation	10:20 AM	10:40 AM	Yes	100%	0:20
Wayne Bridge	Coding		Fix Corpsite header in NS	10:30 AM	11:10 AM	Yes	100%	0:40
Wayne Bridge	Project Management		Fill PPS, tune timesheet	12:30 PM	01:45 PM	Yes	100%	1:15
Bent Larsen	Design		TimeAssistant	12:45 PM	02:00 PM	Yes	100%	1:15
Bent Larsen	Design		TimeAssistant	02:00 PM	02:25 PM	Yes	100%	0:25
Fernando Torres	Editing		Thank You page	02:30 PM	03:15 PM	Yes	100%	0:45
Wayne Bridge	Coding		Add links to site map, fix services	03:45 PM	04:35 PM	Yes	100%	0:50
Total for Day								**5:30**
05/02/2004, Sunday								
User	Work Type	Task	Description	Start	Stop	Appr.	Paid	Time
Bent Larsen	Design		TimeAssistant	02:00 PM	02:35 PM	Yes	100%	0:35
Bent Larsen	Project Management		Talk to Div about TimeAssistant	02:35 PM	02:55 PM	Yes	100%	0:20

‘Projects by User’ Timesheet Report for a specified period (year, month, week, etc.)



TimeSheet By Users for Period: 03/21/2000 - 04/21/2005

Time Records for User *Bent Larsen*

05/01/2004, Saturday

Project	Work Type	Task	Description	Start	Stop	Appr.	Paid	Time
reZrestaurants	Project Management		PPS	10:00 AM	10:20 AM	Yes	100%	0:20
Corpsite	Project Management		Talk to Div about project documentation	10:20 AM	10:40 AM	Yes	100%	0:20
FleetImprovement	Project Management	Functional Specification	PPS	10:40 AM	12:45 PM	Yes	100%	2:05
Corpsite	Design		TimeAssistant	12:45 PM	02:00 PM	Yes	100%	1:15
Corpsite	Design		TimeAssistant	02:00 PM	02:25 PM	Yes	100%	0:25
FleetImprovement	Project Management	Functional Specification	Talk to h2o	02:50 PM	03:40 PM	Yes	100%	0:50
FleetImprovement	Coding		Grid	03:40 PM	04:50 PM	Yes	100%	1:10
FleetImprovement	Coding		Greed	04:50 PM	08:00 PM	Yes	100%	3:10
Total for Day								**9:35**

05/02/2004, Sunday

Project	Work Type	Task	Description	Start	Stop	Appr.	Paid	Time
FleetImprovement	Coding		Grid	05:55 AM	06:30 AM	Yes	100%	0:35
FleetImprovement	Coding		Classes in PHP	10:30 AM	02:00 PM	Yes	100%	3:30
Corpsite	Design		TimeAssistant	02:00 PM	02:35 PM	Yes	100%	0:35
Corpsite	Project		Talk to Div about	02:35 PM	02:55 PM	Yes	100%	0:20

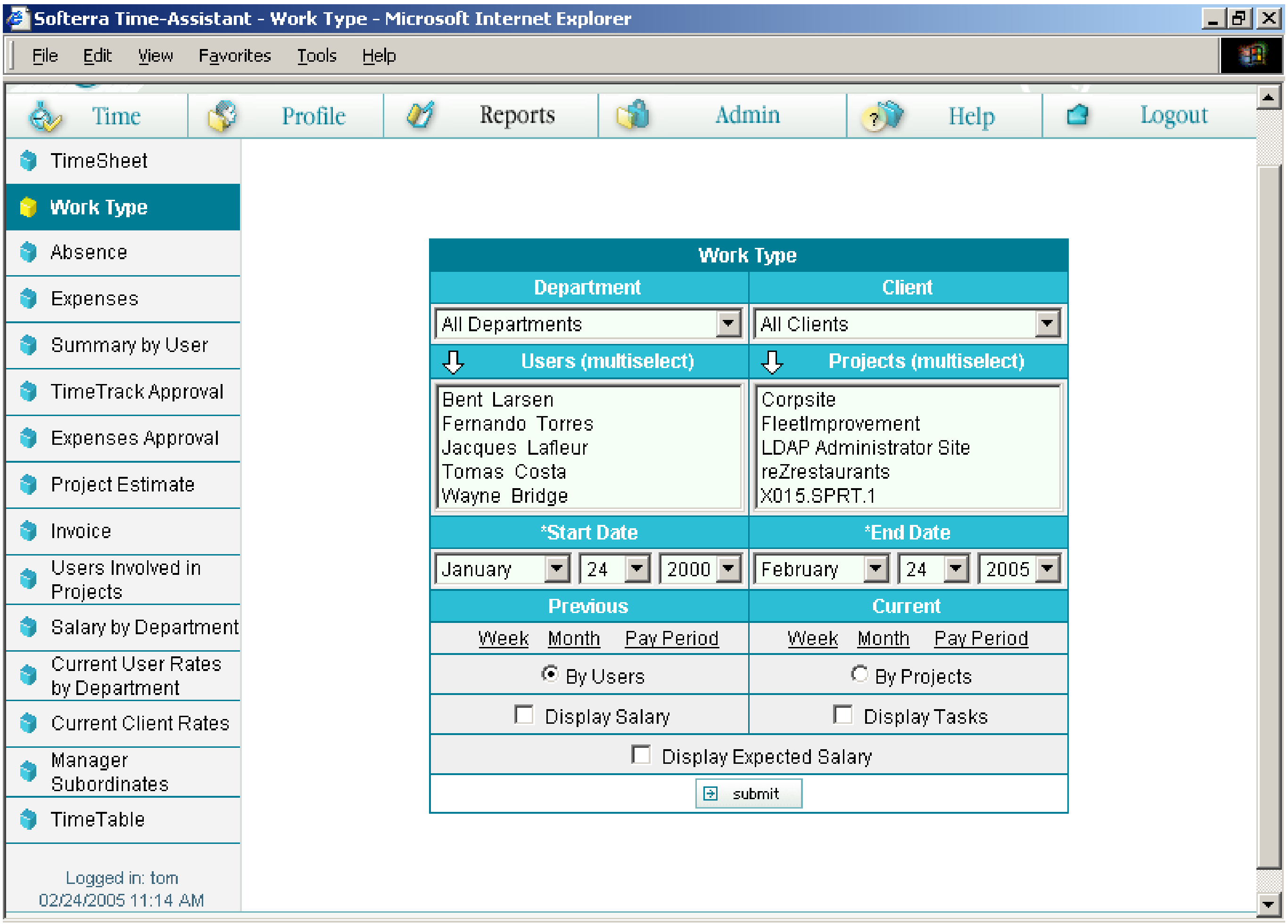
To export a report to an XLS file, click on a corresponding button in the upper right-hand corner of the screen.

Work Type Report

A Work Type report can be available to any Time-Assistant user. However, its functionality may vary depending on what sort of permissions a person generating the report possesses.

A chart below features what sort of information a Work Type report will contain if generated by a representative of each of the Time-Assistant user categories.

Administrator	Manager	Employee
Unlimited functionality – the report may contain information on any user (including pay rates)	Information on any SUBORDINATE user (Employee or Manager) (including pay rates)	Information only concerning projects of personal involvement and on other Employees, whose TimeTracks are available for viewing (including PERSONAL pay rates only)

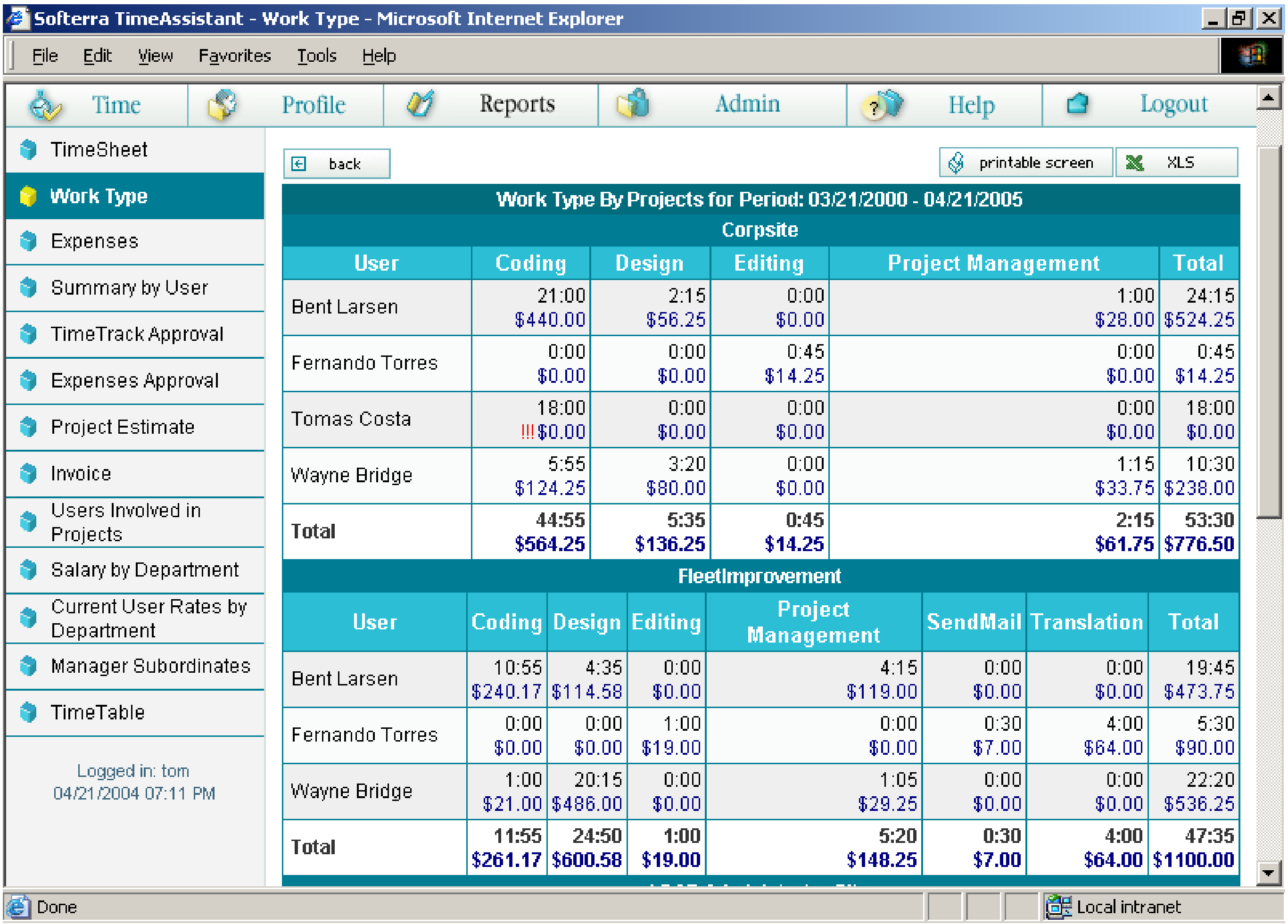


The Work Type report is generated using the page shown above. To do it, one needs to choose a project(-s) from a select box on the left and employees – from the other one on the right (multiple selection available). Then set a sorting mode (either ‘by Projects’ or ‘by Users’) and a time interval, and finally click SUBMIT to confirm selection.

If “Display Tasks” checkbox is checked, the report will contain task details.

NOTE! If the “Display Salary” checkbox is left unchecked, the reports are going to display just the hours without any salary information.

‘Rates (hours/salary) by Project’ for a specified period (year, month, week, etc.)



Work Type By Projects for Period: 03/21/2000 - 04/21/2005

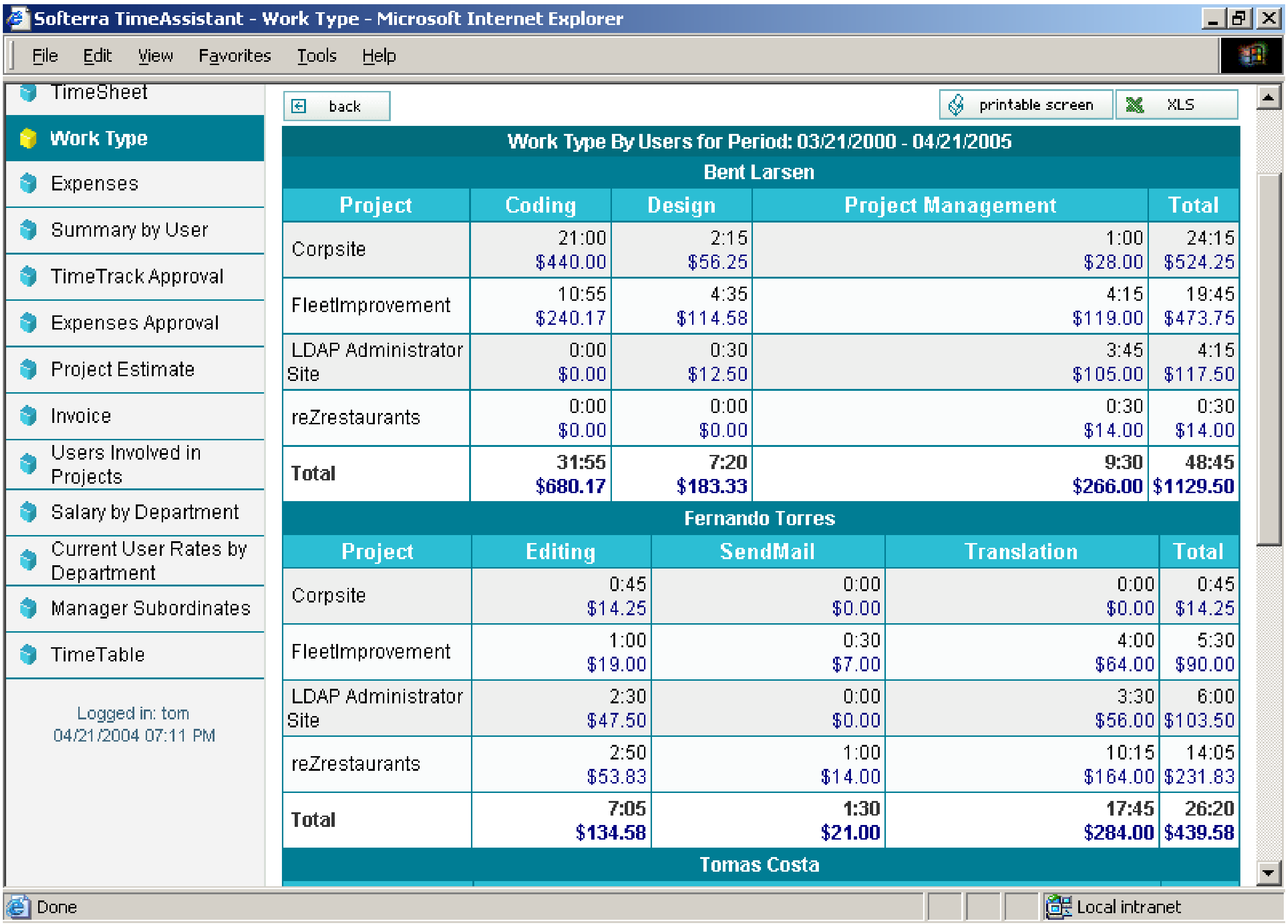
Corpsite

User	Coding	Design	Editing	Project Management	Total
Bent Larsen	21:00 $440.00	2:15 $56.25	0:00 $0.00	1:00 $28.00	24:15 $524.25
Fernando Torres	0:00 $0.00	0:00 $0.00	0:45 $14.25	0:00 $0.00	0:45 $14.25
Tomas Costa	18:00 !!! $0.00	0:00 $0.00	0:00 $0.00	0:00 $0.00	18:00 $0.00
Wayne Bridge	5:55 $124.25	3:20 $80.00	0:00 $0.00	1:15 $33.75	10:30 $238.00
Total	**44:55 $564.25**	**5:35 $136.25**	**0:45 $14.25**	**2:15 $61.75**	**53:30 $776.50**

FleetImprovement

User	Coding	Design	Editing	Project Management	SendMail	Translation	Total
Bent Larsen	10:55 $240.17	4:35 $114.58	0:00 $0.00	4:15 $119.00	0:00 $0.00	0:00 $0.00	19:45 $473.75
Fernando Torres	0:00 $0.00	0:00 $0.00	1:00 $19.00	0:00 $0.00	0:30 $7.00	4:00 $64.00	5:30 $90.00
Wayne Bridge	1:00 $21.00	20:15 $486.00	0:00 $0.00	1:05 $29.25	0:00 $0.00	0:00 $0.00	22:20 $536.25
Total	**11:55 $261.17**	**24:50 $600.58**	**1:00 $19.00**	**5:20 $148.25**	**0:30 $7.00**	**4:00 $64.00**	**47:35 $1100.00**

‘Rates (hours/salary) by User’ for a specified period (year, month, week, etc.)



Work Type By Users for Period: 03/21/2000 - 04/21/2005

Bent Larsen

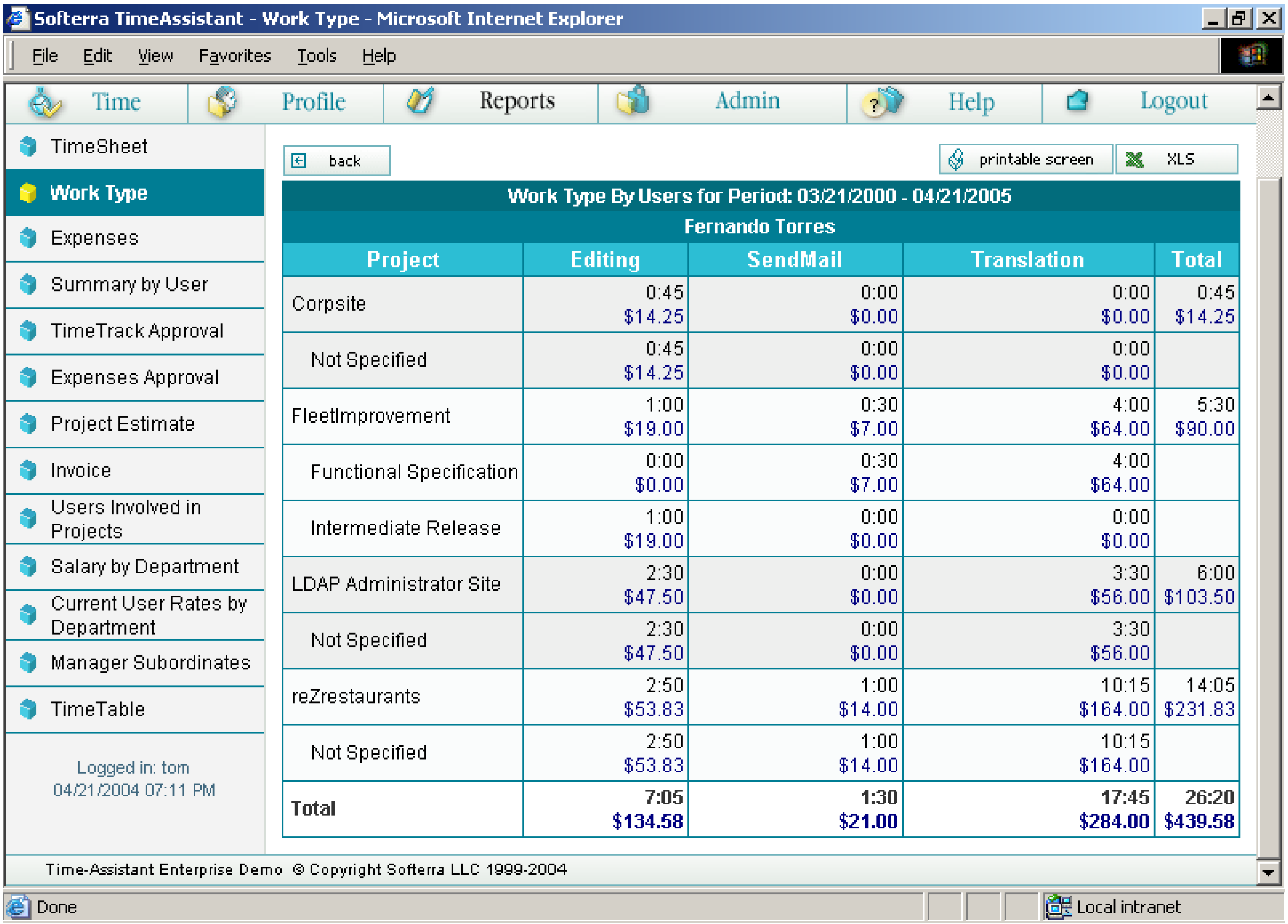
Project	Coding	Design	Project Management	Total
Corpsite	21:00 $440.00	2:15 $56.25	1:00 $28.00	24:15 $524.25
FleetImprovement	10:55 $240.17	4:35 $114.58	4:15 $119.00	19:45 $473.75
LDAP Administrator Site	0:00 $0.00	0:30 $12.50	3:45 $105.00	4:15 $117.50
reZrestaurants	0:00 $0.00	0:00 $0.00	0:30 $14.00	0:30 $14.00
Total	**31:55 $680.17**	**7:20 $183.33**	**9:30 $266.00**	**48:45 $1129.50**

Fernando Torres

Project	Editing	SendMail	Translation	Total
Corpsite	0:45 $14.25	0:00 $0.00	0:00 $0.00	0:45 $14.25
FleetImprovement	1:00 $19.00	0:30 $7.00	4:00 $64.00	5:30 $90.00
LDAP Administrator Site	2:30 $47.50	0:00 $0.00	3:30 $56.00	6:00 $103.50
reZrestaurants	2:50 $53.83	1:00 $14.00	10:15 $164.00	14:05 $231.83
Total	**7:05 $134.58**	**1:30 $21.00**	**17:45 $284.00**	**26:20 $439.58**

Tomas Costa

'Rates (hours/salary) by User detailed by Tasks' for a specified period (year, month, week,etc.)



Work Type By Users for Period: 03/21/2000 - 04/21/2005

Fernando Torres

Project	Editing	SendMail	Translation	Total
Corpsite	0:45 $14.25	0:00 $0.00	0:00 $0.00	0:45 $14.25
Not Specified	0:45 $14.25	0:00 $0.00	0:00 $0.00	
FleetImprovement	1:00 $19.00	0:30 $7.00	4:00 $64.00	5:30 $90.00
Functional Specification	0:00 $0.00	0:30 $7.00	4:00 $64.00	
Intermediate Release	1:00 $19.00	0:00 $0.00	0:00 $0.00	
LDAP Administrator Site	2:30 $47.50	0:00 $0.00	3:30 $56.00	6:00 $103.50
Not Specified	2:30 $47.50	0:00 $0.00	3:30 $56.00	
reZrestaurants	2:50 $53.83	1:00 $14.00	10:15 $164.00	14:05 $231.83
Not Specified	2:50 $53.83	1:00 $14.00	10:15 $164.00	
Total	**7:05 $134.58**	**1:30 $21.00**	**17:45 $284.00**	**26:20 $439.58**

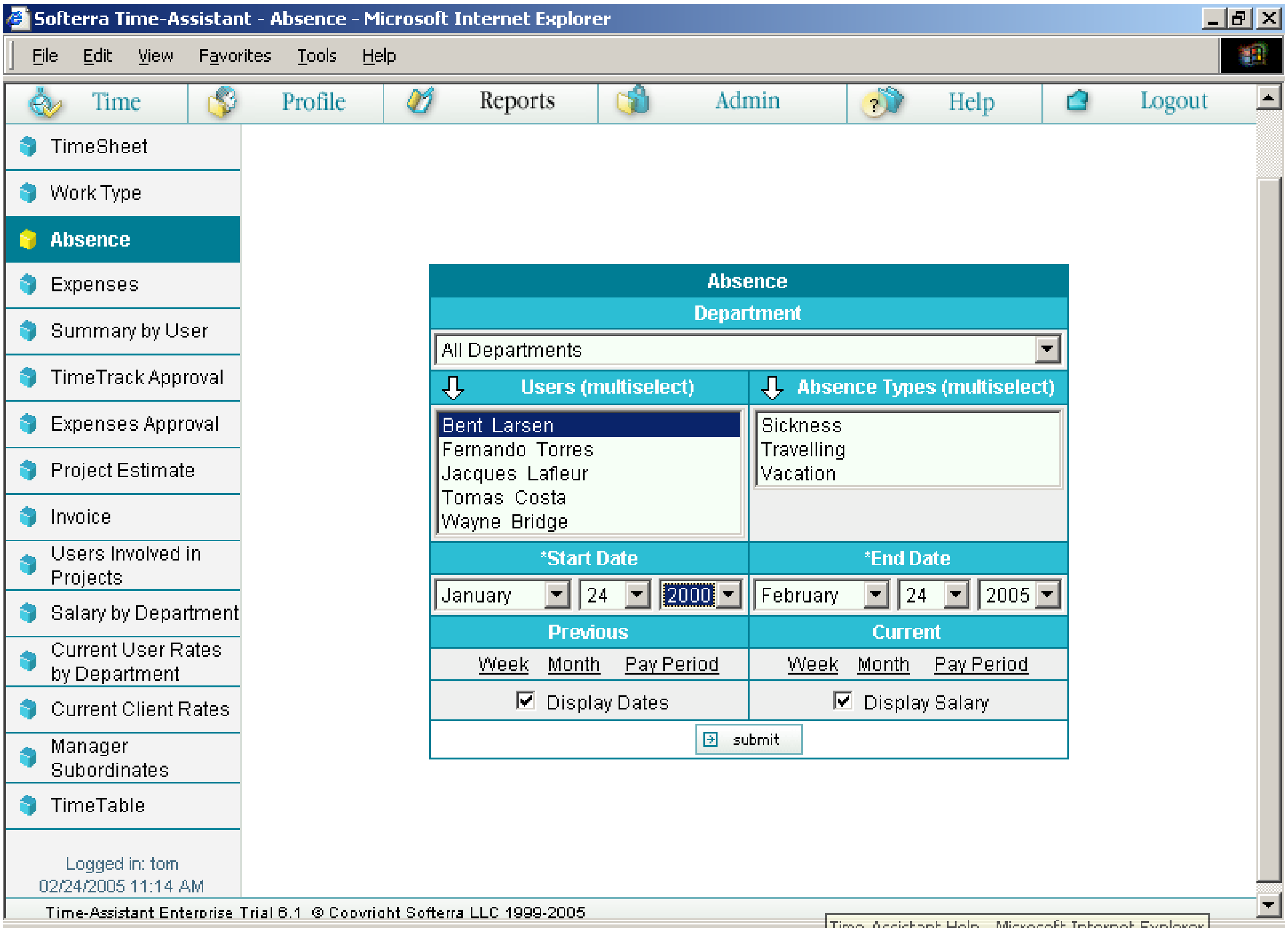
To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

Absence Report

An Absence report can be available to any Time-Assistant user. However, its functionality may vary depending on what sort of permissions a person generating the report possesses.

A chart below features what sort of information an Absence report will contain if generated by a representative of each of the Time-Assistant user categories.

Administrator	Manager	Employee
Unlimited functionality – the report may contain information on any user (including pay rates)	Information on any SUBORDINATE user (Employee or Manager) (including pay rates)	Information only concerning projects of personal involvement and on other Employees, whose TimeTracks are available for viewing (including PERSONAL pay rates only)

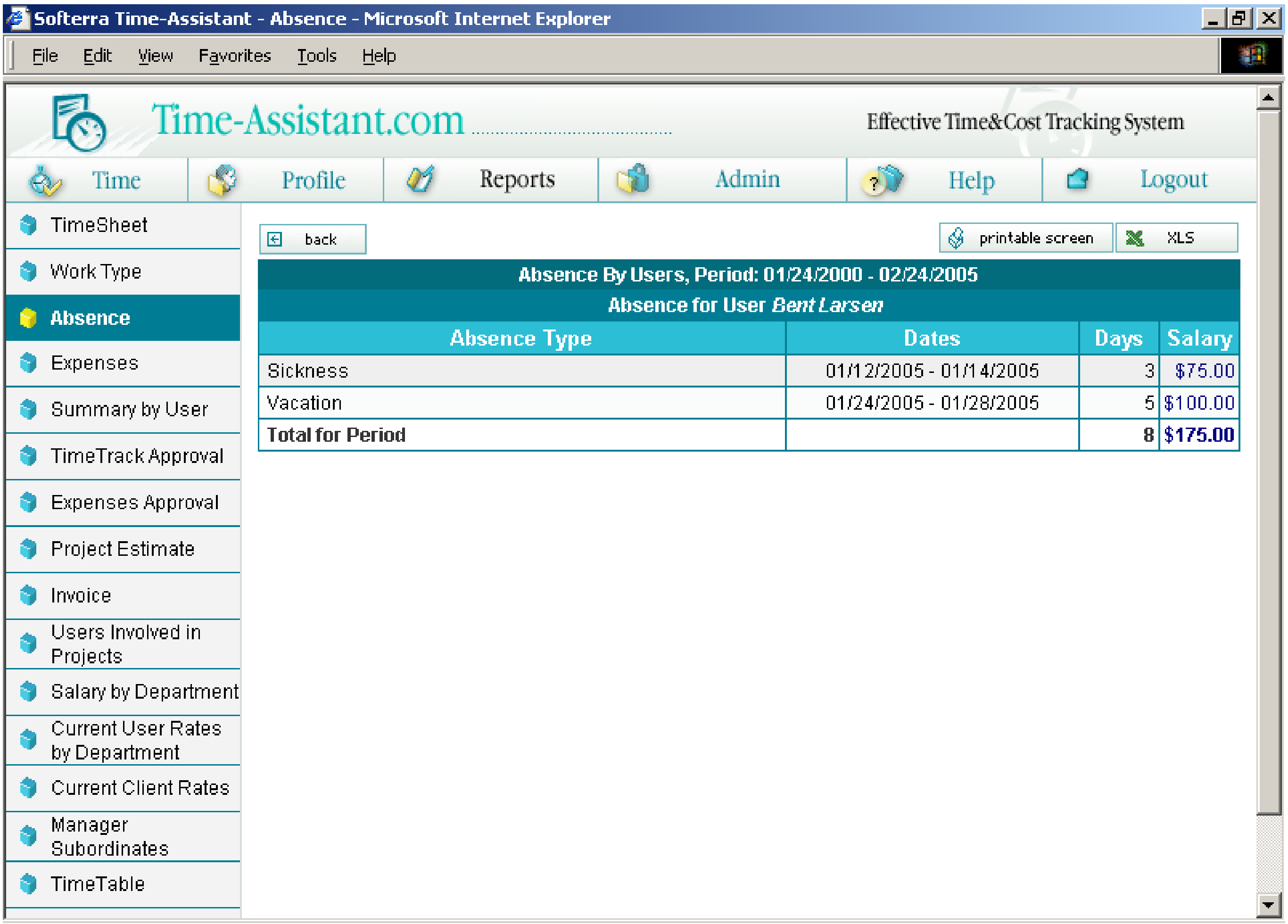


The Absence report is generated using the page shown above. To do it, one needs to choose an absence type(-s) from a select box on the right and employees – from the other one on the left (multiple selection available). Then set a time interval, and finally click SUBMIT to confirm selection.

If "Display Dates" checkbox is checked, the report will contain absence dates details.

NOTE! If the "Display Salary" checkbox is left unchecked, the reports are going to display just the hours without any salary information.

'Absences' for a specified period (year, month, week, etc.)



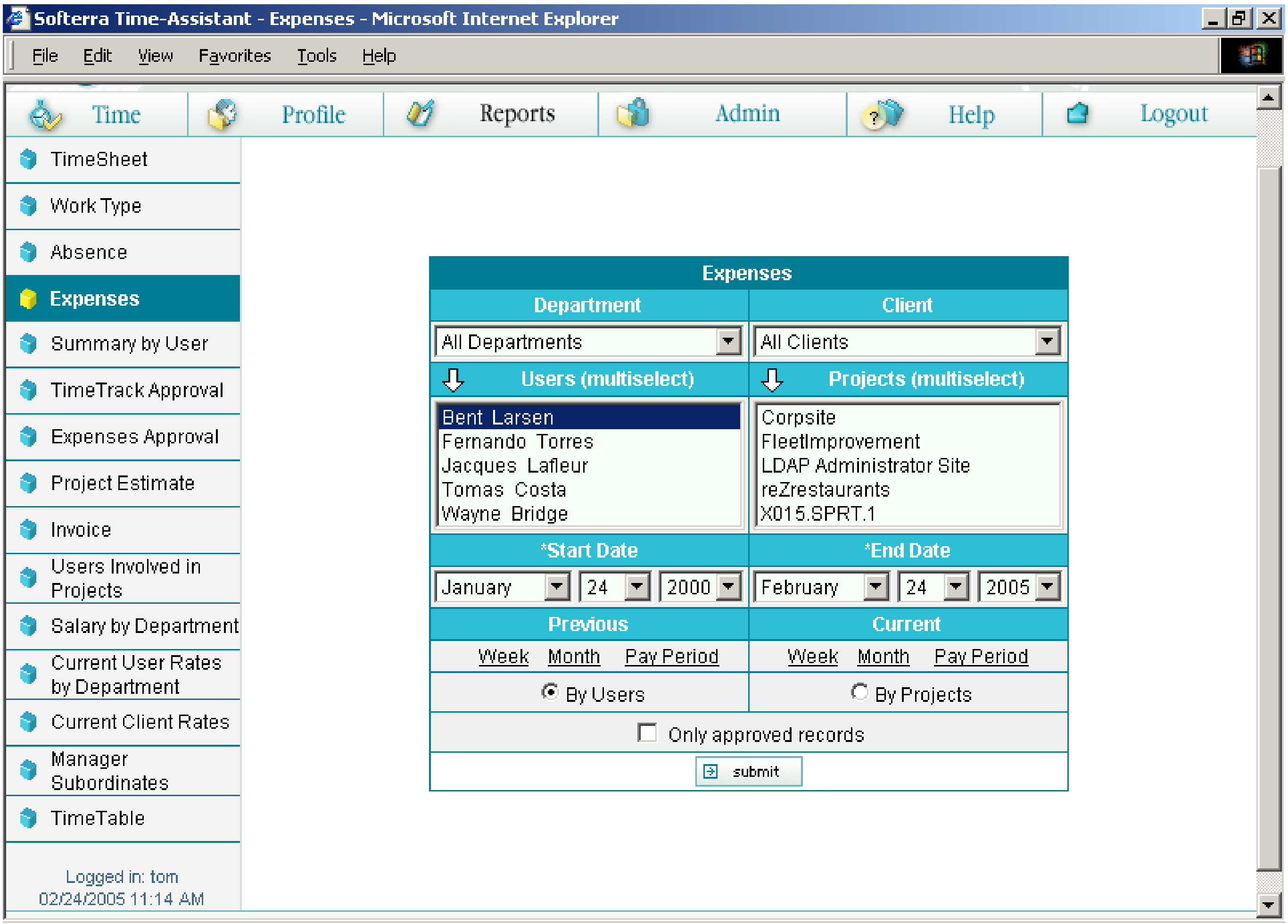
To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

Expenses Report

An Expenses report can be available to any Time-Assistant user. However, its functionality may vary depending on what sort of permissions a person generating the report possesses.

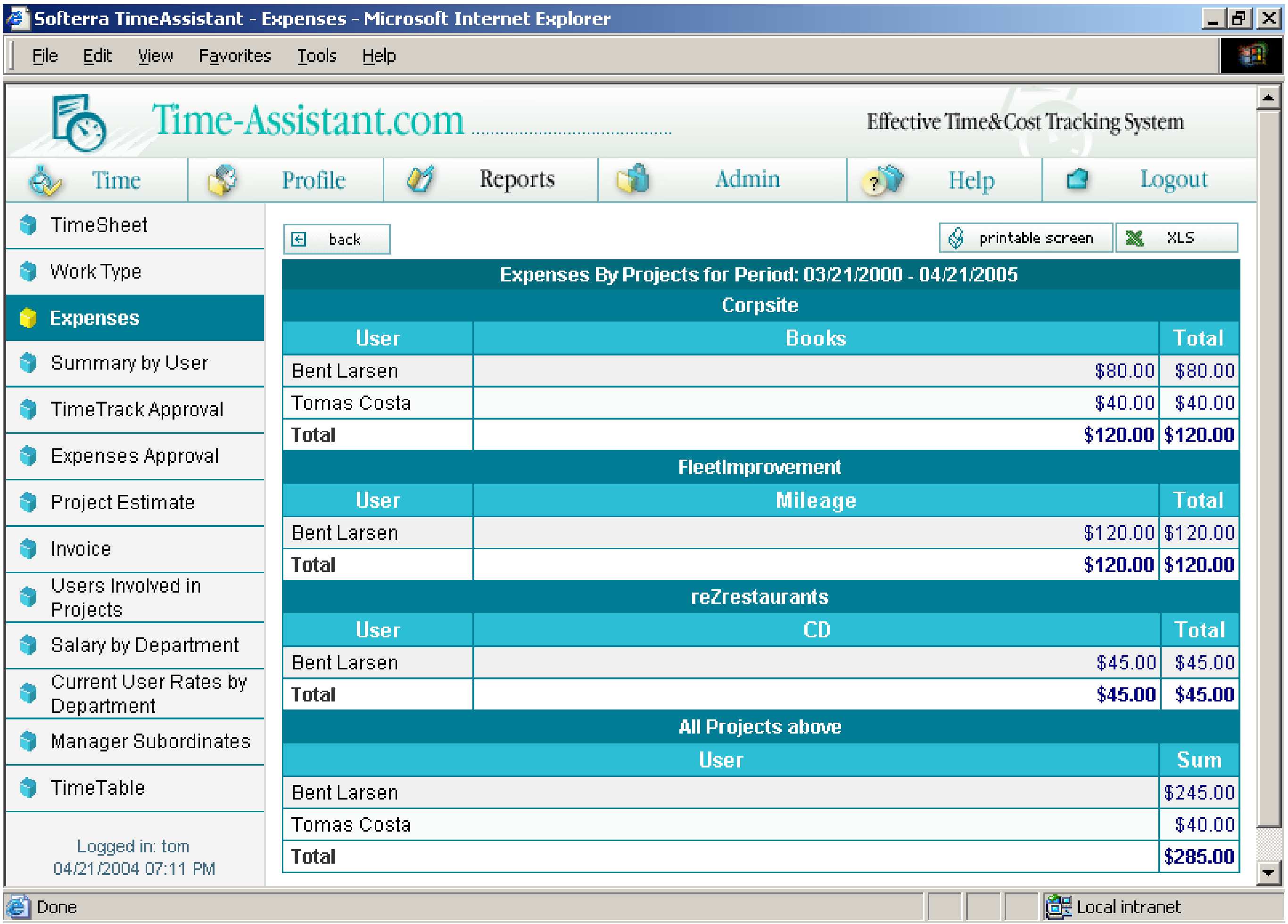
A chart below features what sort of information a Timesheet report will contain if generated by a representative of each of the Time-Assistant user categories.

Administrator	Manager	Employee
Unlimited functionality – the report may include information on any project/user	Information on projects of personal involvement and on any SUBORDINATE user (Employee or Manager)	Information on projects of personal involvement and on other Employees, whose TimeTracks are available for viewing

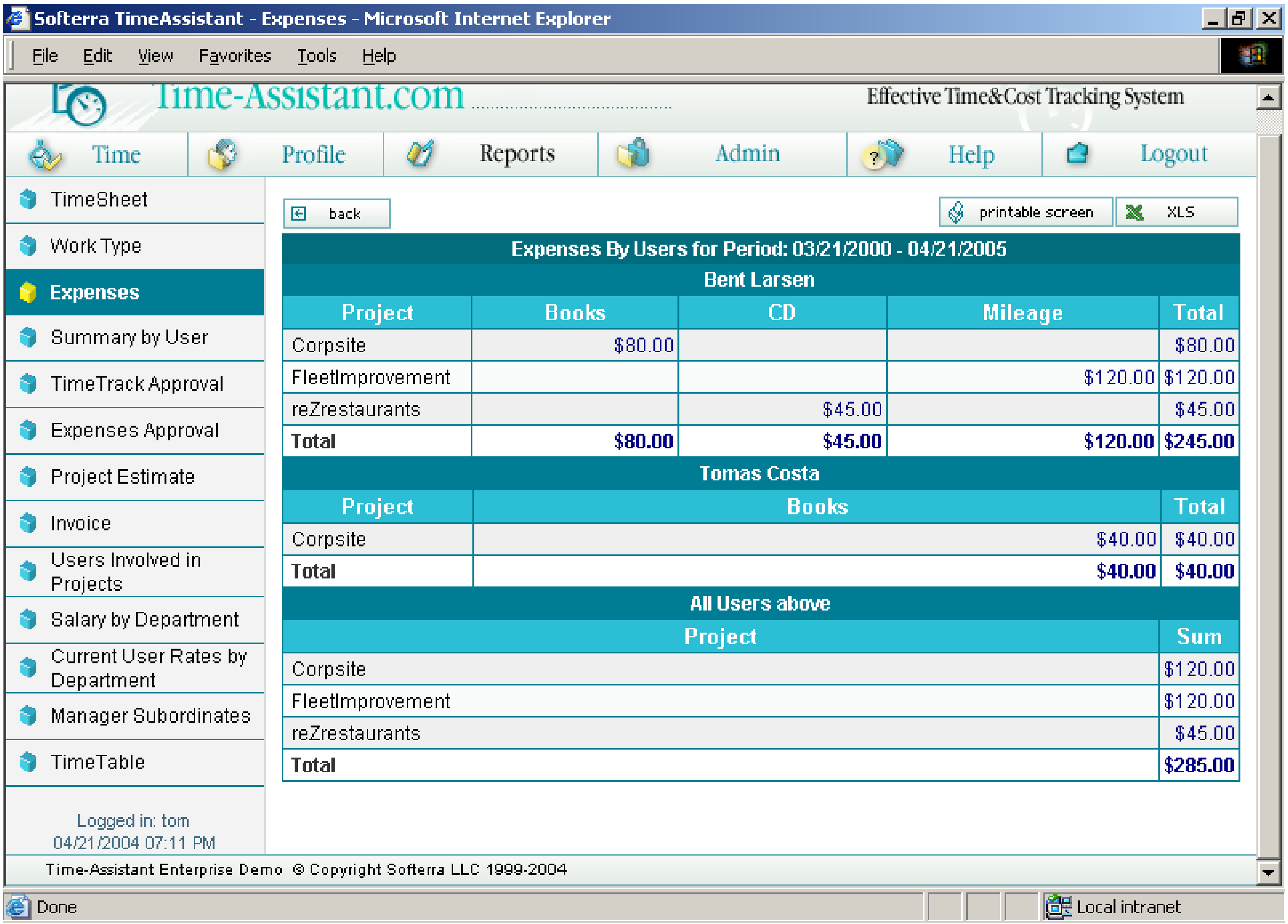


The Expenses report is generated using the page shown above. To do it, one needs to choose a project(-s) from a select box on the left and employees – from the other one on the right (multiple selection available). Then set a sorting mode (either ‘by Projects’ or ‘by Users’) and a time interval, and finally click SUBMIT to confirm selection.

Employee's 'Users by Project' Expenses Report for a specified period (year, month, week, etc.)



Employee's 'Projects by User' Expenses Report for a specified period (year, month, week, etc.)



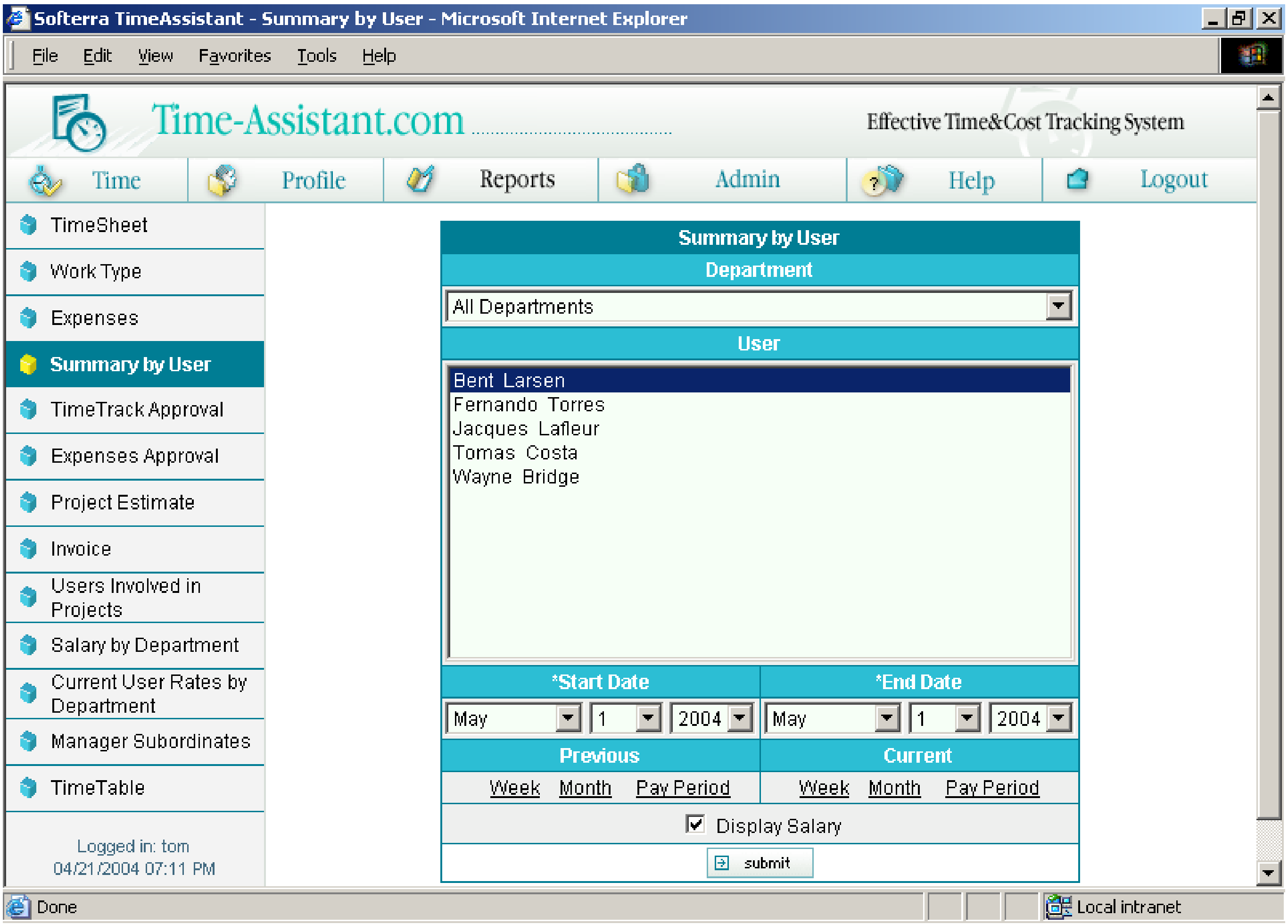
To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

Summary Report by Employee

A Summary report is available to any Time-Assistant user. However, its functionality may vary depending on what sort of permissions a person generating the report possesses.

A chart below features what sort of information a Timesheet report will contain if generated by a representative of each of the Time-Assistant user categories.

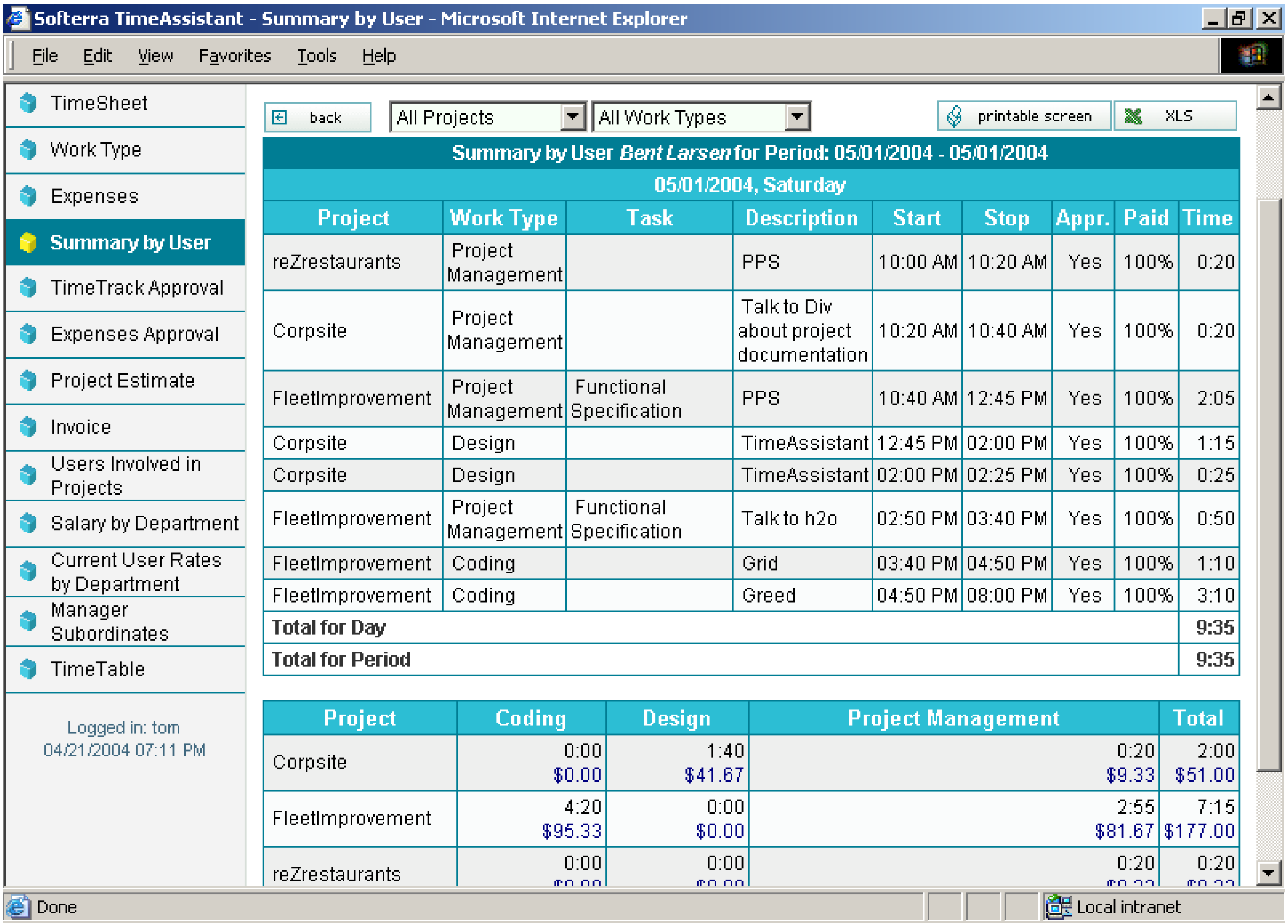
Administrator	Manager	Employee
Unlimited functionality – the report may include information on any user	Information on any SUBORDINATE user (Employee or Manager)	Personal information and that on other Employees, whose TimeTracks are available for viewing



This report is generated using the page shown above. To do it, one needs to choose one employee from the select box, then set a time interval, and finally click SUBMIT to confirm selection.

NOTE! If the "Display Salary" checkbox is left unchecked, the reports are going to display just the hours without any salary information.

Actually, the Summary report is a combination of a Timesheet, Absence and a Work Type reports. It allows users to view timesheets supplemented with rate summaries.

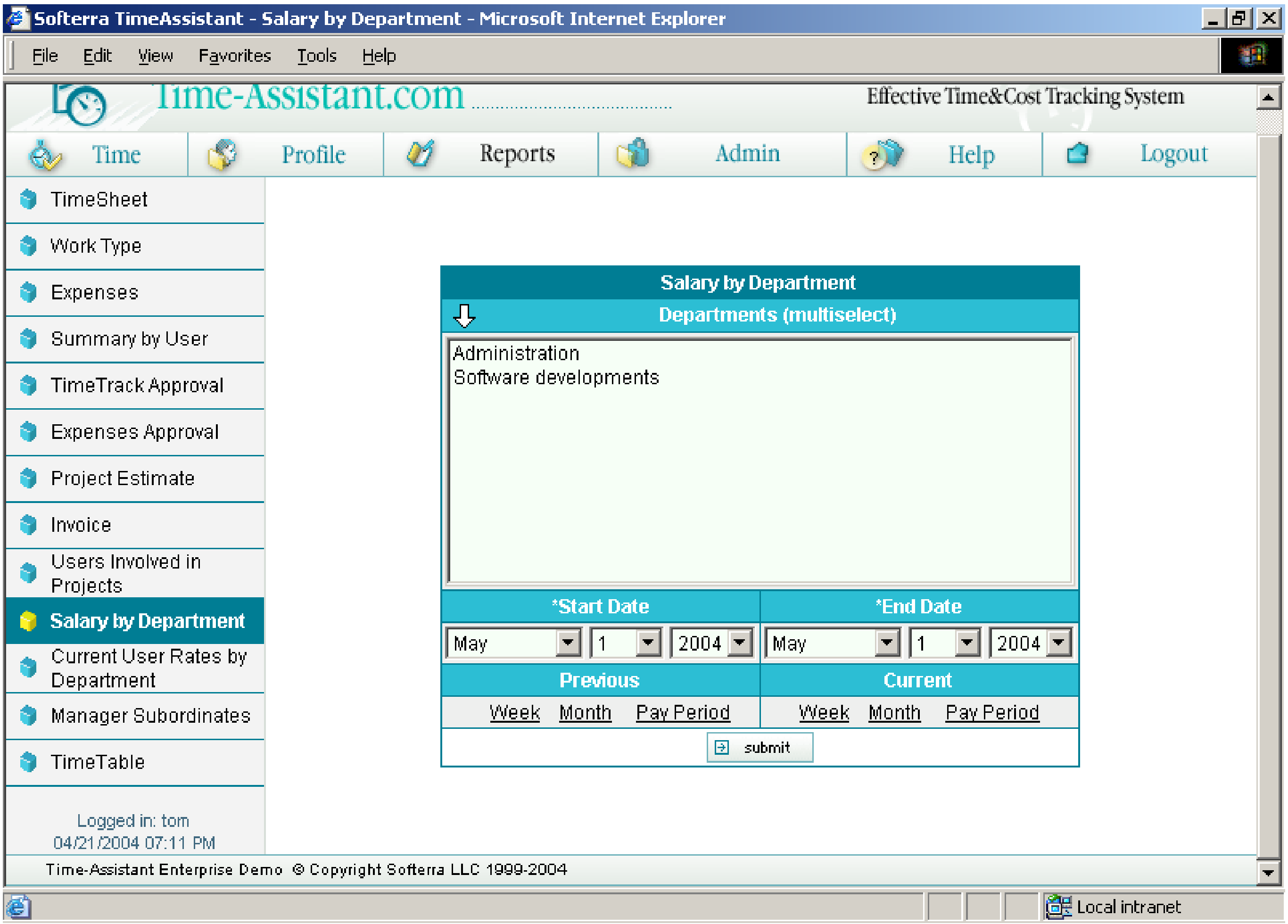


NOTE! Sometimes users may encounter situations when a salary is not calculated due to relating rates not having been properly set. To be always notified of such instances when they occur, one needs to check the 'Display warnings in rate reports' box inside the SETTINGS section. If enabled, the report will have this sort of errors marked with a triple exclamation (!!!).

To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

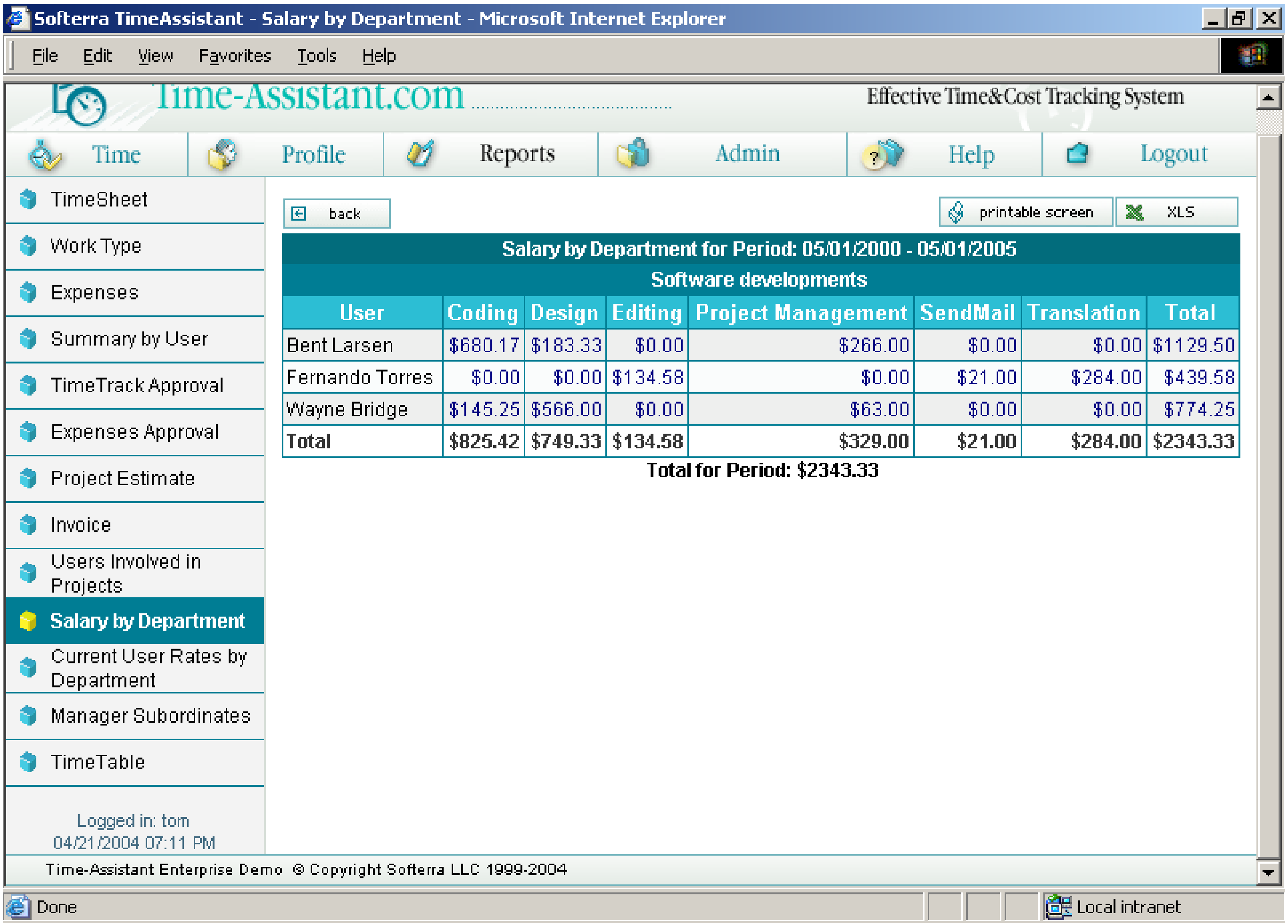
Salary Report by Department

NOTE! AVAILABLE TO ADMINISTRATORS ONLY!



This page is for the Administrator to select a Department(-s) from the box, then choose a time interval and finally click SUBMIT to confirm selection.

Salary Report by Department



User	Coding	Design	Editing	Project Management	SendMail	Translation	Total
Bent Larsen	$680.17	$183.33	$0.00	$266.00	$0.00	$0.00	$1129.50
Fernando Torres	$0.00	$0.00	$134.58	$0.00	$21.00	$284.00	$439.58
Wayne Bridge	$145.25	$566.00	$0.00	$63.00	$0.00	$0.00	$774.25
Total	$825.42	$749.33	$134.58	$329.00	$21.00	$284.00	$2343.33

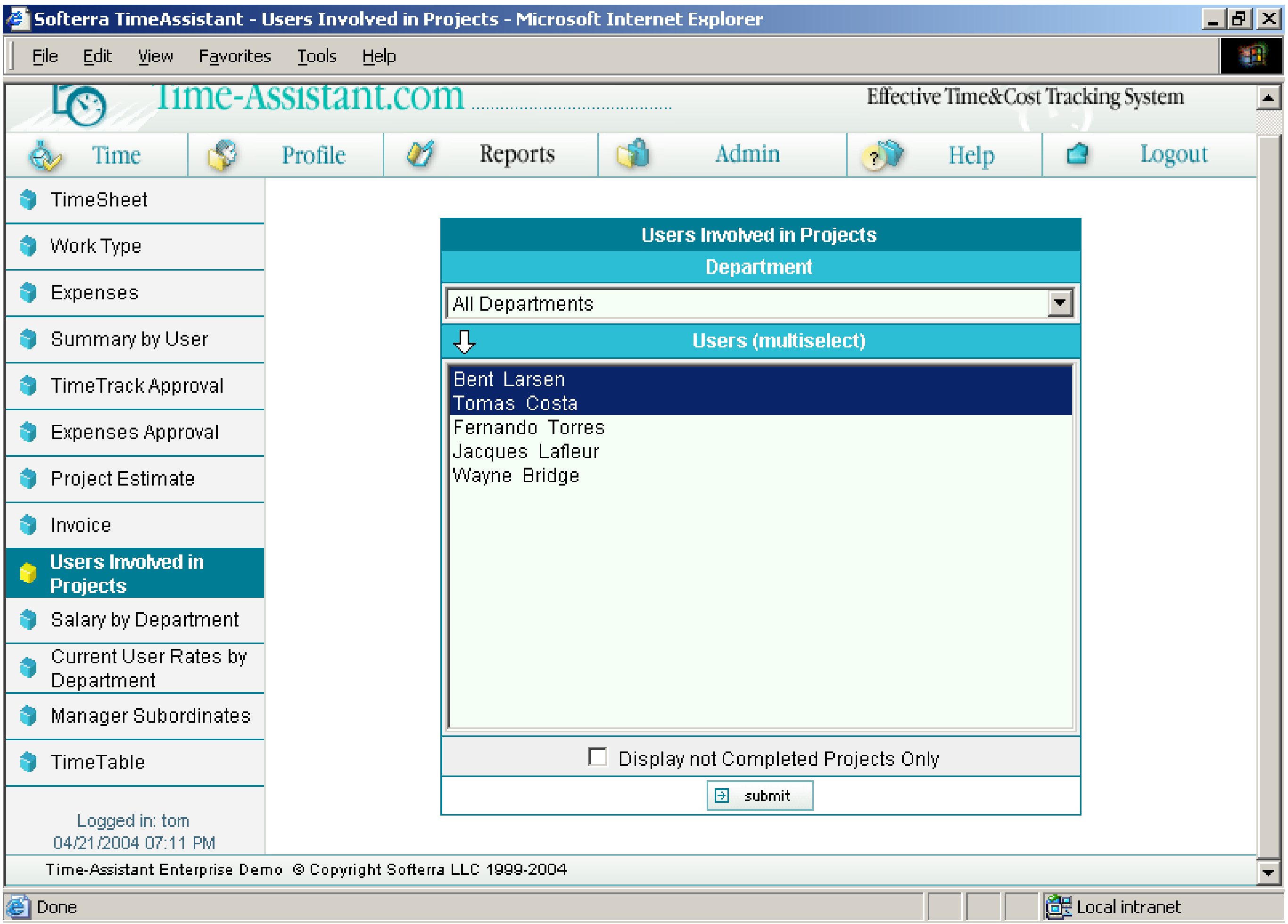
To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

Employees Involvement Report

An Employees Involvement report is available to any Time-Assistant user. However, its functionality may vary depending on what sort of permissions a person generating the report possesses.

A chart below features what kind of information an Employees Involvement report will contain if generated by a representative of each of the Time-Assistant user categories.

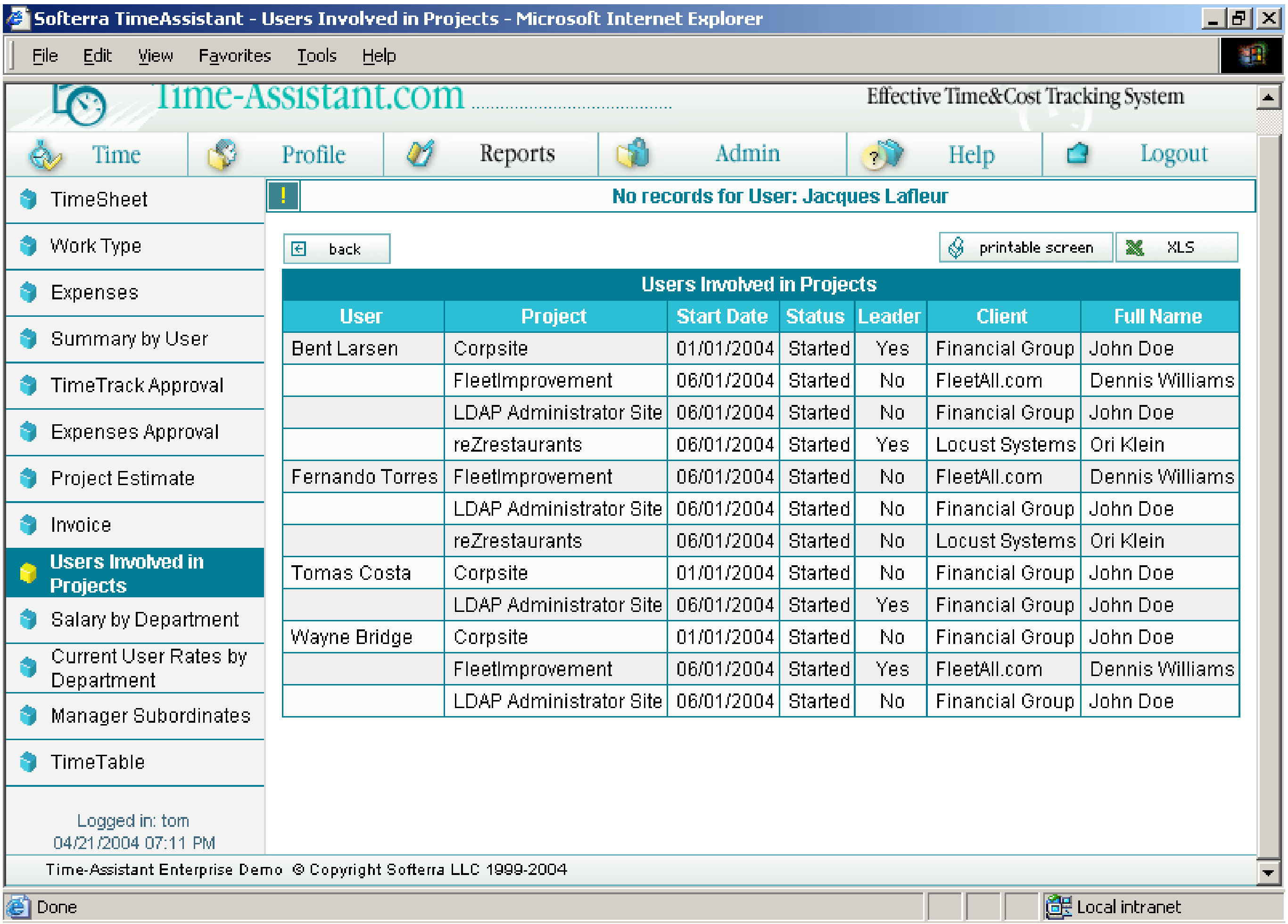
Administrator	Manager	Employee
Unlimited functionality – the report may include information on any one or more users	Personal information or that on any SUBORDINATE user (Employee or Manager)	Personal information and that on other Employees, whose TimeTracks are available for viewing



Generating this report is very simple - just select one or more users from the box and then press SUBMIT (see the screenshot above).

NOTE! If the "Display Current Projects Only" checkbox is left unchecked, the report will only display the Completed Projects.

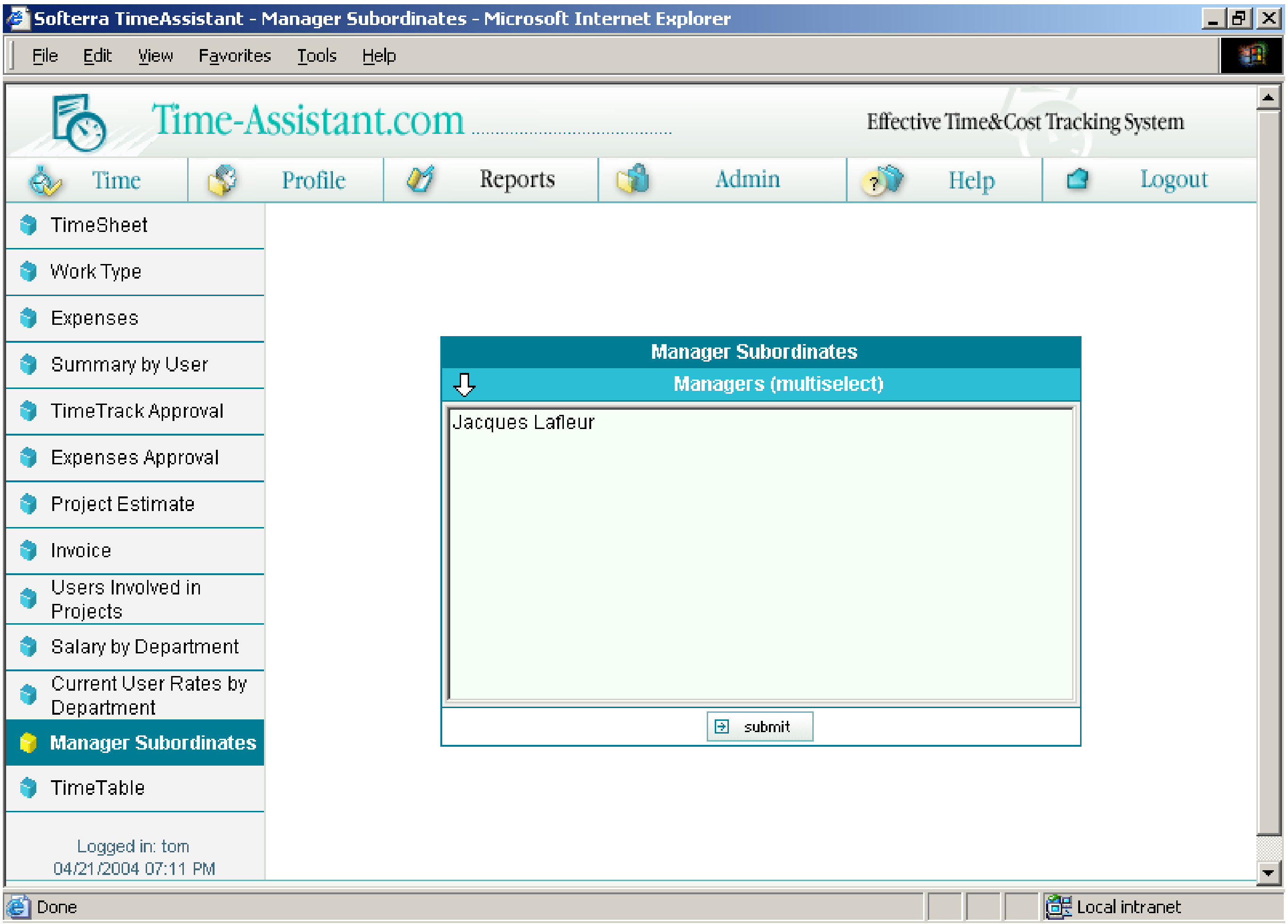
Employees Involved in Projects Report



To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

Manager Subordinates Report

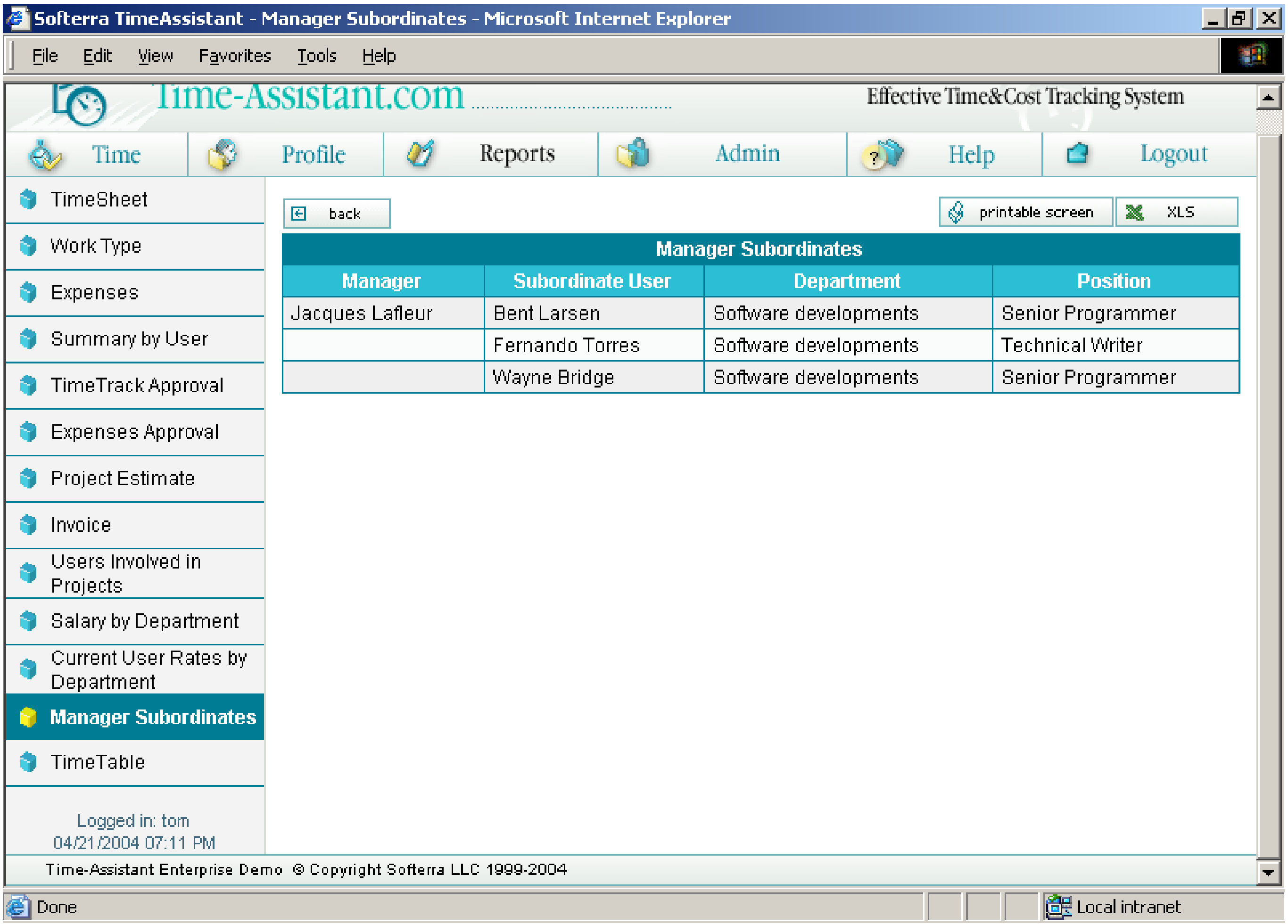
NOTE! AVAILABLE TO THE ADMINISTRATOR AND SUPERVISING MANAGERS ONLY!



All the Administrator or a supervising Manager need to do when on this page is just select one or more Managers from the box and then press SUBMIT (see the screenshot above).

The resulting report will display all subordinate users of a selected Manager(-s).

Manager Subordinates Report



To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

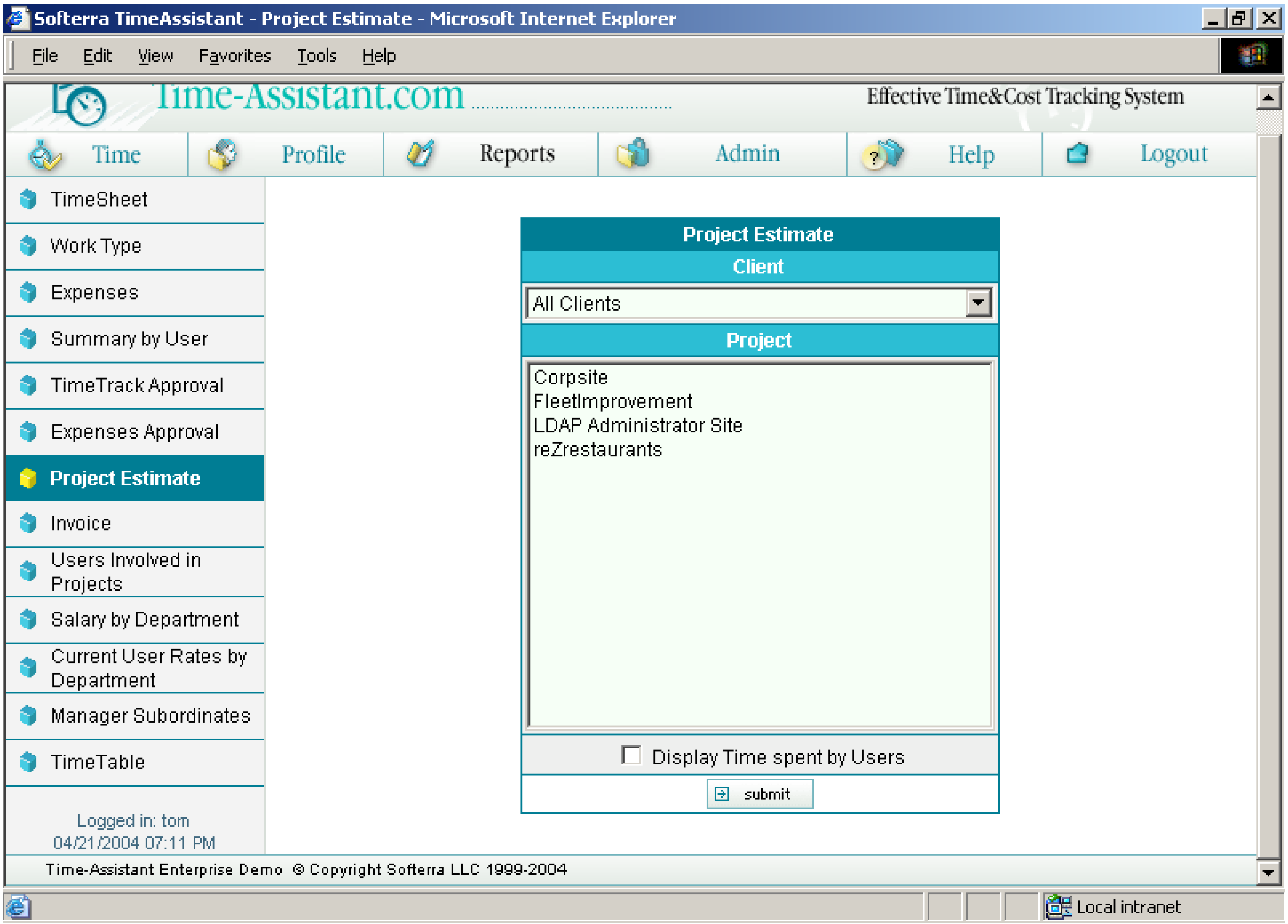
Project Estimate

A Project Estimate report is available to any Time-Assistant user. However, its functionality may vary depending on what sort of permissions a person generating the report possesses.

A chart below features what kind of information a Project Estimate report will contain if generated by a representative of each of the Time-Assistant user categories.

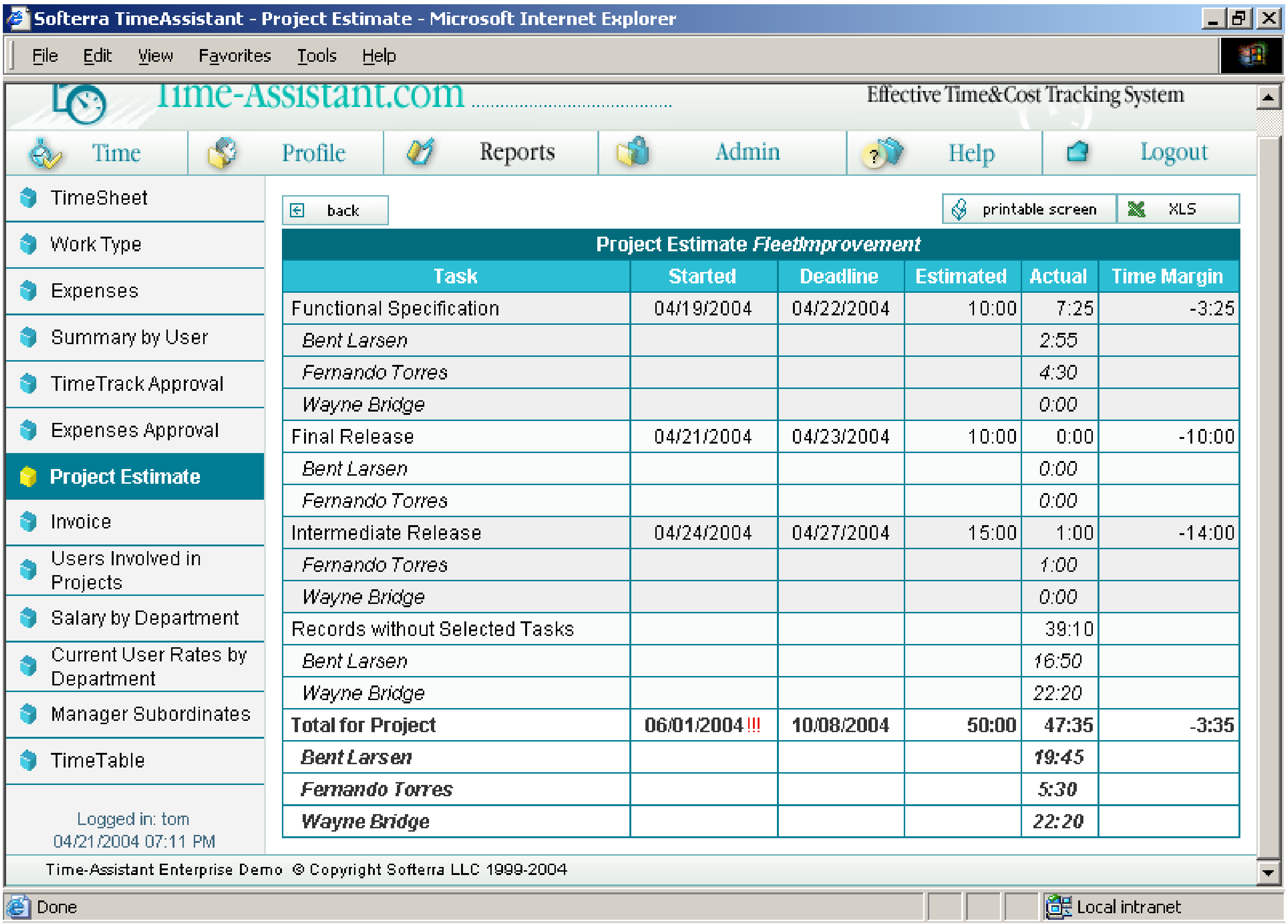
Administrator	Manager	Employee
Unlimited functionality – the report may include information on any one or more projects (including all projects)	Information just on projects of PERSONAL involvement	Information just on projects of PERSONAL involvement

The Report displays the information on the time spent on a certain project including all of its Tasks, as well as on under(over-)estimated time (if any).



Use the page shown above to select a project from the box. Then specify whether or not you wish to display detailed user information via a corresponding checkbox and finally click SUBMIT to confirm your selection.

Project Estimate



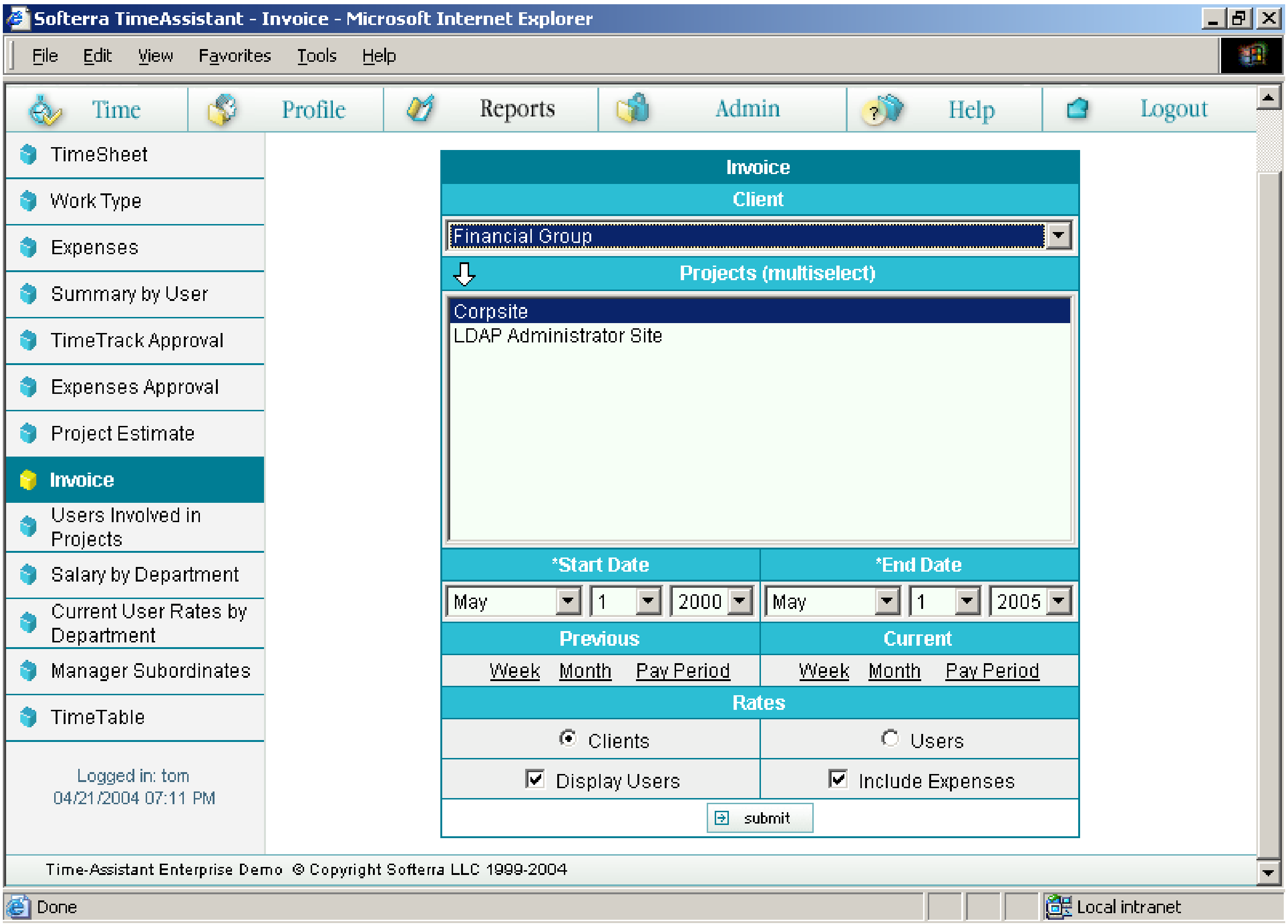
Project Estimate *FleetImprovement*

Task	Started	Deadline	Estimated	Actual	Time Margin
Functional Specification	04/19/2004	04/22/2004	10:00	7:25	-3:25
Bent Larsen				*2:55*	
Fernando Torres				*4:30*	
Wayne Bridge				*0:00*	
Final Release	04/21/2004	04/23/2004	10:00	0:00	-10:00
Bent Larsen				*0:00*	
Fernando Torres				*0:00*	
Intermediate Release	04/24/2004	04/27/2004	15:00	1:00	-14:00
Fernando Torres				*1:00*	
Wayne Bridge				*0:00*	
Records without Selected Tasks				39:10	
Bent Larsen				*16:50*	
Wayne Bridge				*22:20*	
Total for Project	**06/01/2004 !!!**	**10/08/2004**	**50:00**	**47:35**	**-3:35**
Bent Larsen				***19:45***	
Fernando Torres				***5:30***	
Wayne Bridge				***22:20***	

To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

Invoices

NOTE! AVAILABLE TO THE ADMINISTRATOR ONLY!

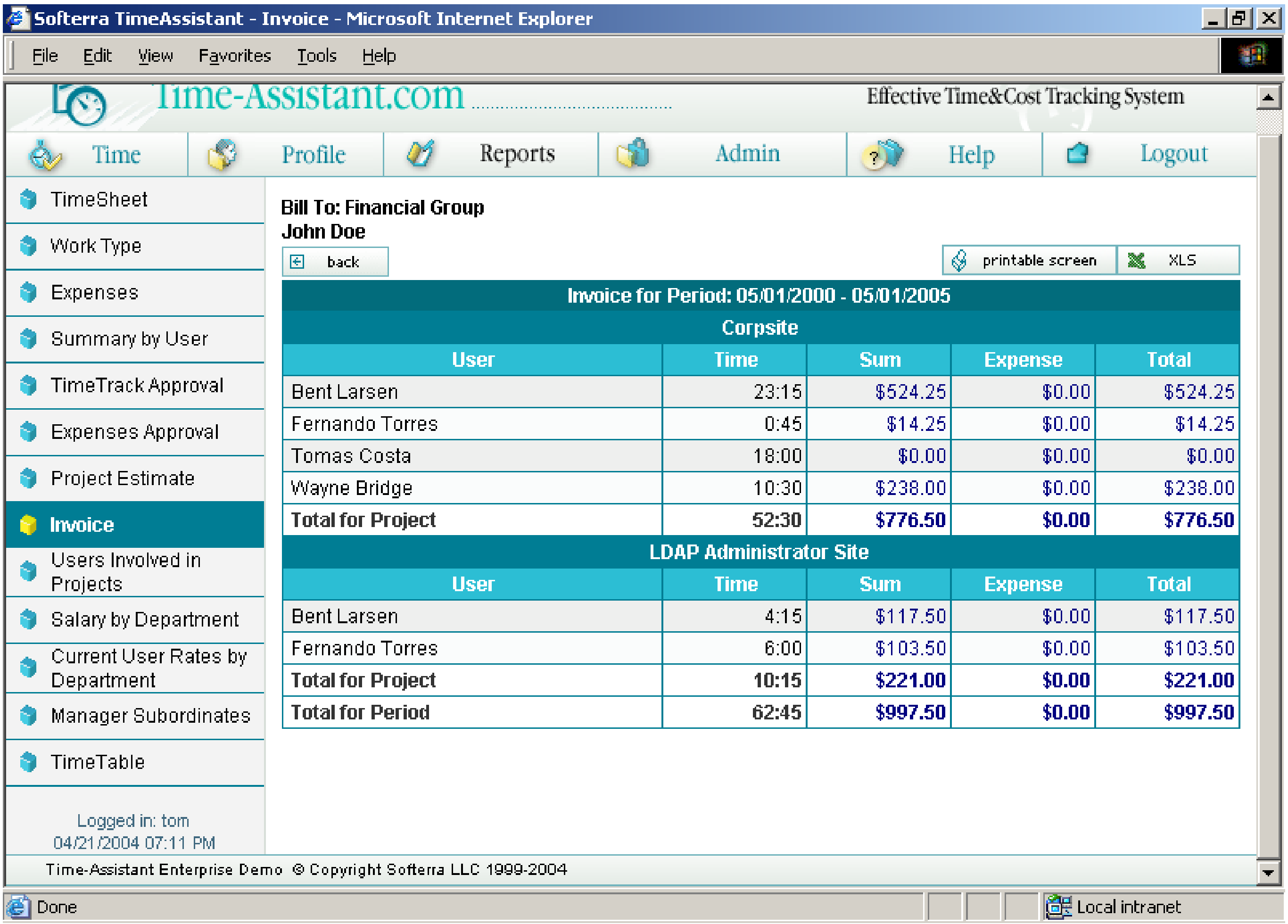


This report provides the Administrator with the following parameters to be selected:

- Client
- Desired time interval - using the 'Start Date' and 'Finish Date' drop-downs
- User (Pay) or Client (Charge) rates – to serve as a basis for calculation.
- Display Users – sets whether to include user details
- Include expenses

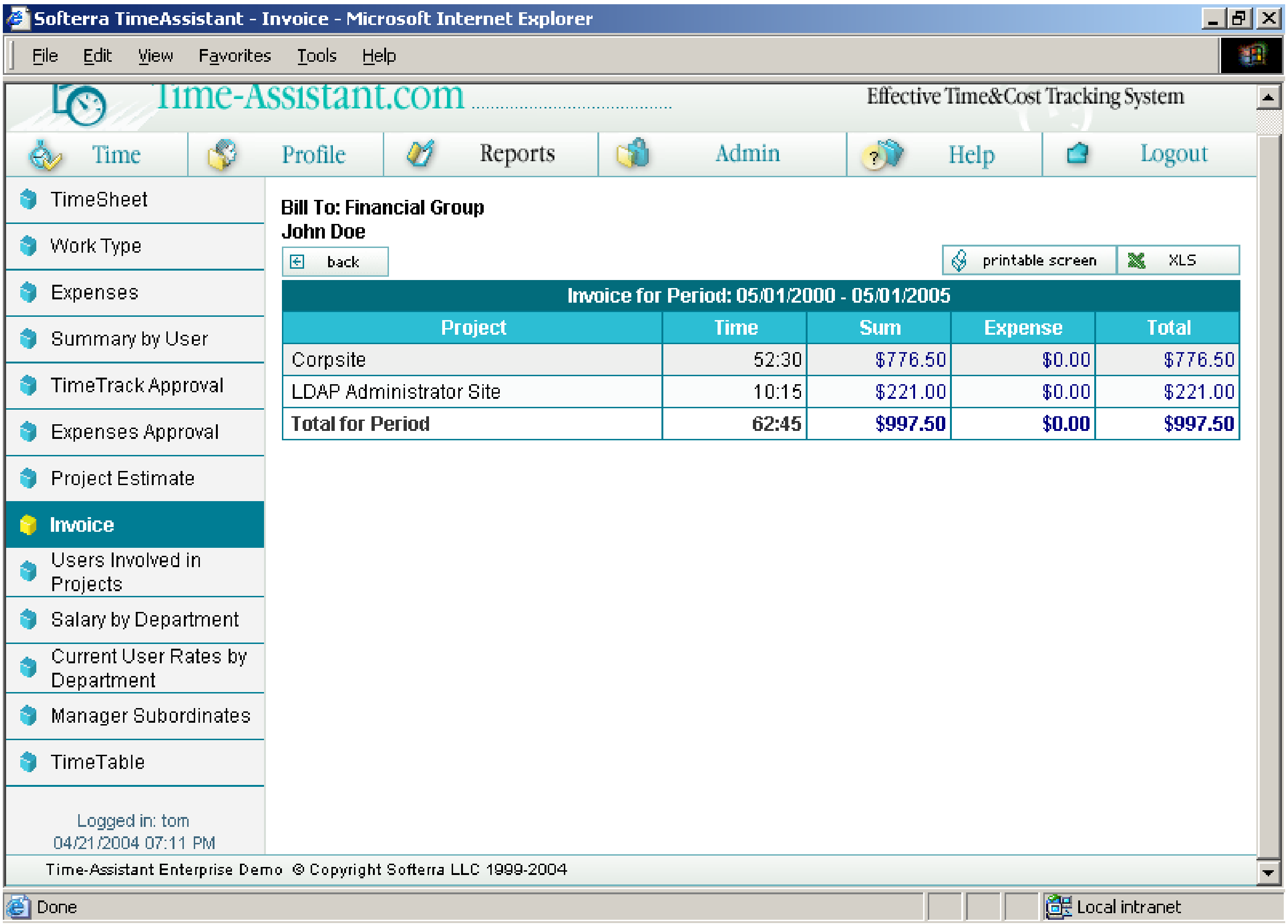
Finally, click SUBMIT to confirm selection when finished.

Invoice 1



Invoice for Period: 05/01/2000 - 05/01/2005				
Corpsite				
User	**Time**	**Sum**	**Expense**	**Total**
Bent Larsen	23:15	$524.25	$0.00	$524.25
Fernando Torres	0:45	$14.25	$0.00	$14.25
Tomas Costa	18:00	$0.00	$0.00	$0.00
Wayne Bridge	10:30	$238.00	$0.00	$238.00
Total for Project	**52:30**	**$776.50**	**$0.00**	**$776.50**
LDAP Administrator Site				
User	**Time**	**Sum**	**Expense**	**Total**
Bent Larsen	4:15	$117.50	$0.00	$117.50
Fernando Torres	6:00	$103.50	$0.00	$103.50
Total for Project	**10:15**	**$221.00**	**$0.00**	**$221.00**
Total for Period	**62:45**	**$997.50**	**$0.00**	**$997.50**

Invoice 2

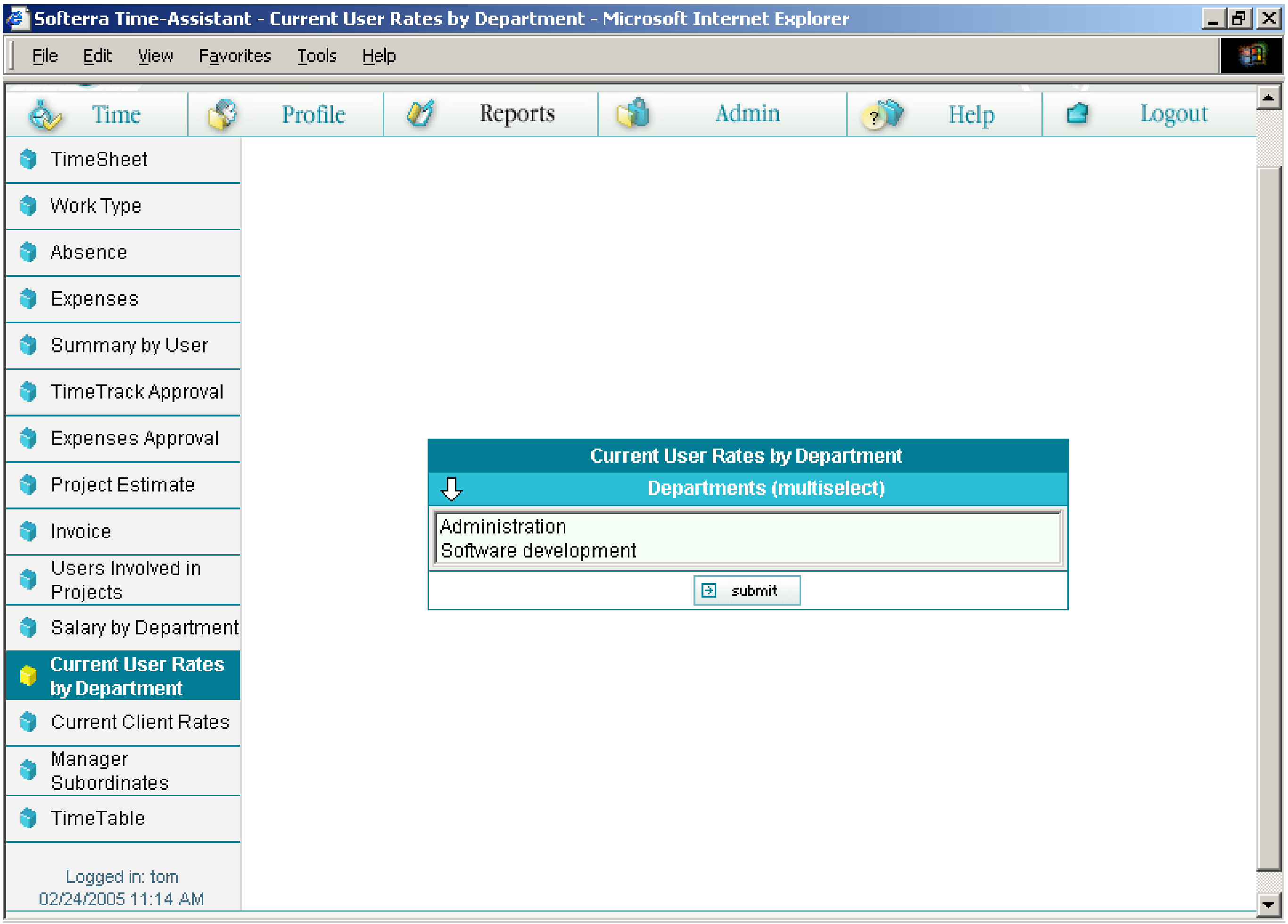


To export an invoice to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

Current User Rates by Department

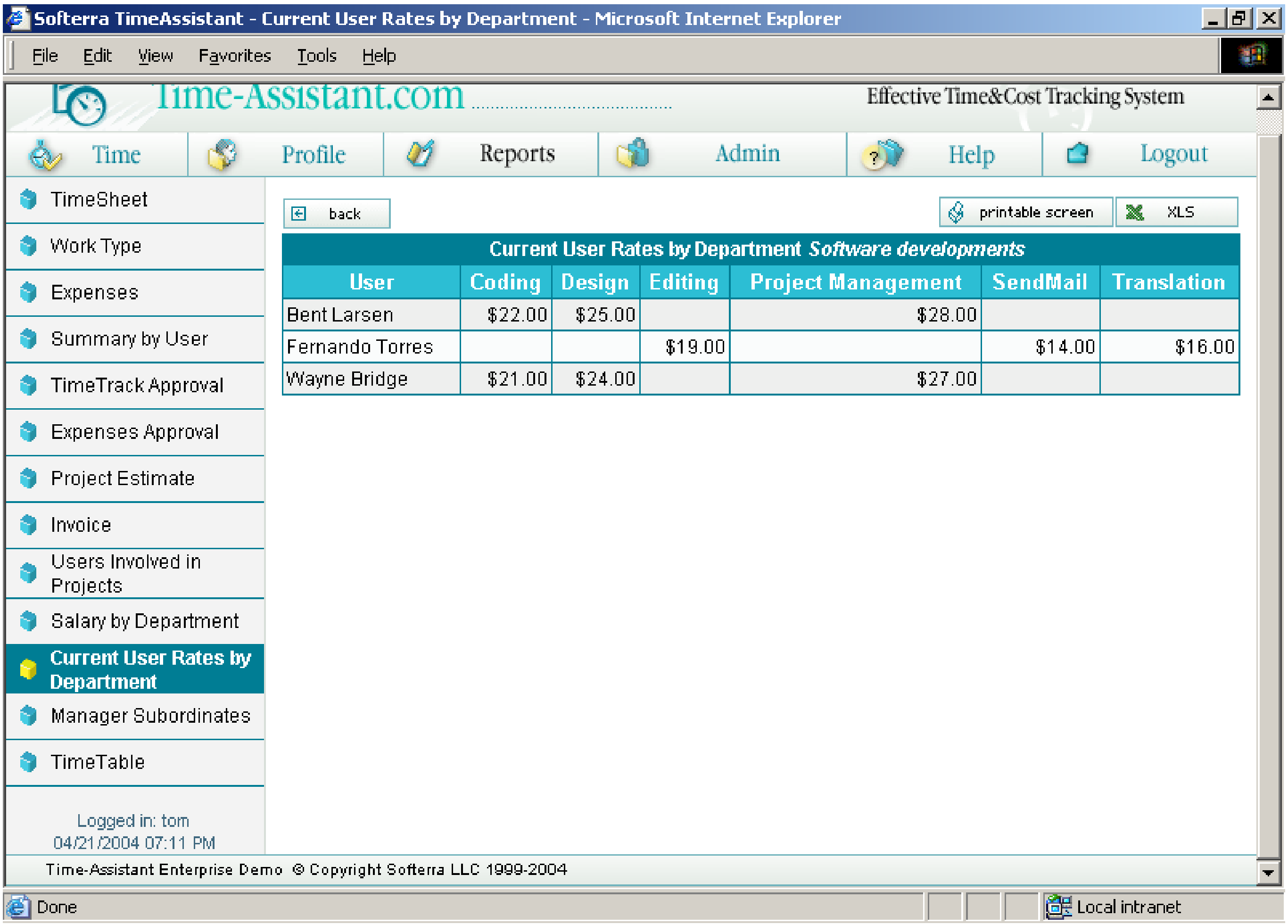
A chart below features what kind of information a Current User Rates report will contain if generated by a representative of each of the Time-Assistant user categories.

Administrator	Manager	Employee
Unlimited functionality – the report may include information on any user from any department (including multiple or all application users)	Information on any SUBORDINATE user (Employee or Manager)	N/A



On this one will have to select a Department(-s) from the displayed list.

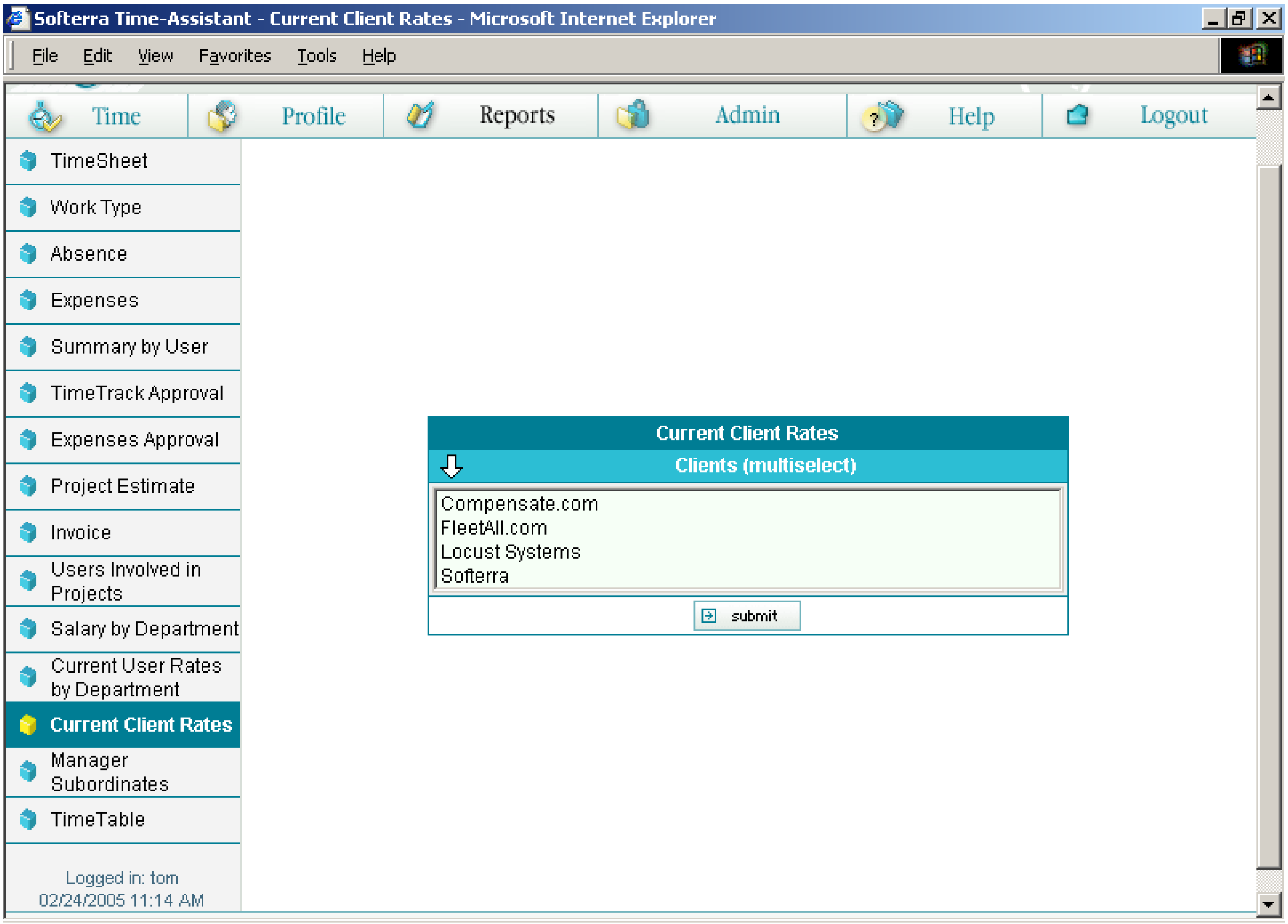
Current User Rates Report by Department



To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

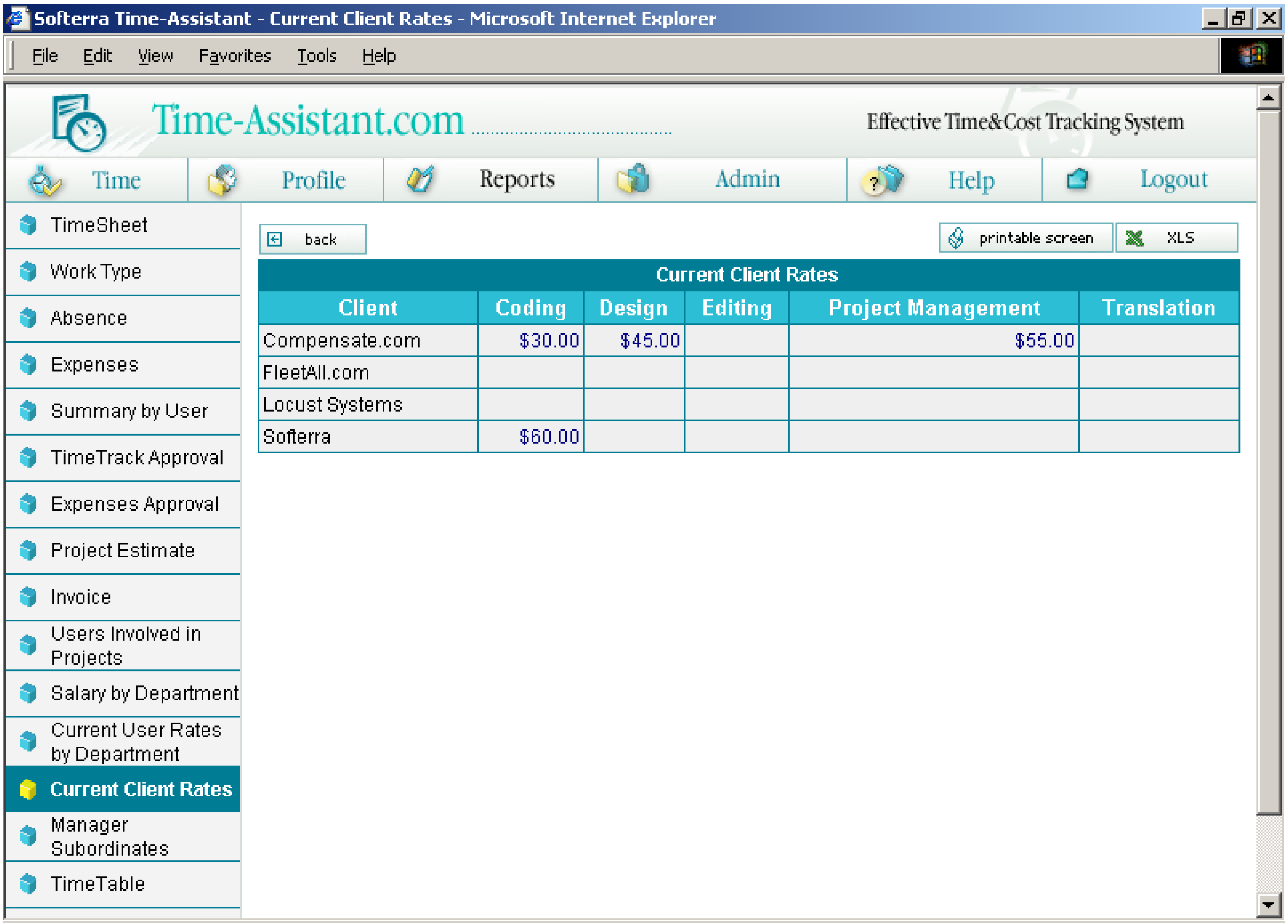
Current Client Rates

Apart from the Administrator, client information can be handled by any kind of a Time-Assistant user, i.e. both Managers and Employees, provided they have appropriate permissions.



On this one will have to select a Client(-s) from the displayed list.

Current Client Rates Report

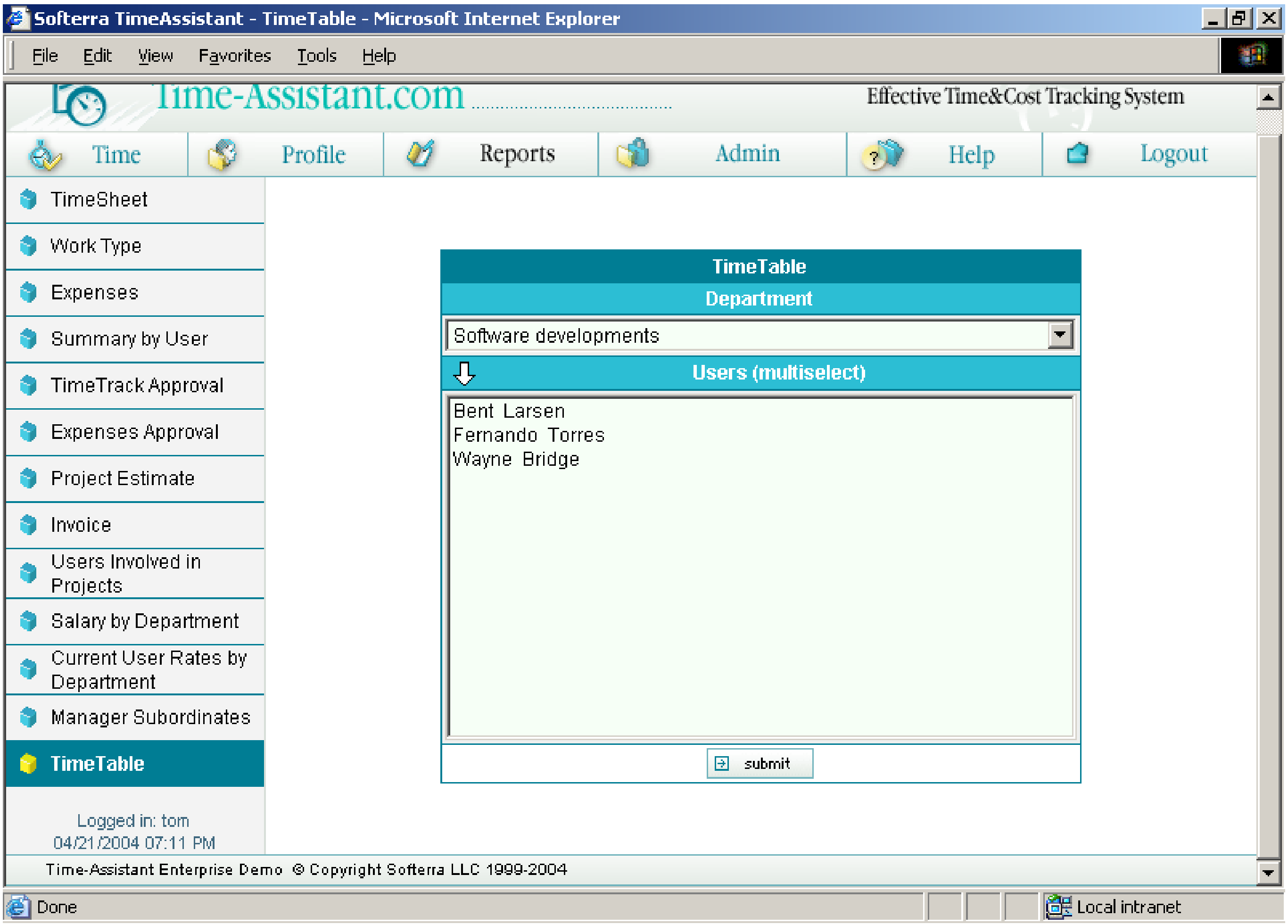


To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

TimeTable Report

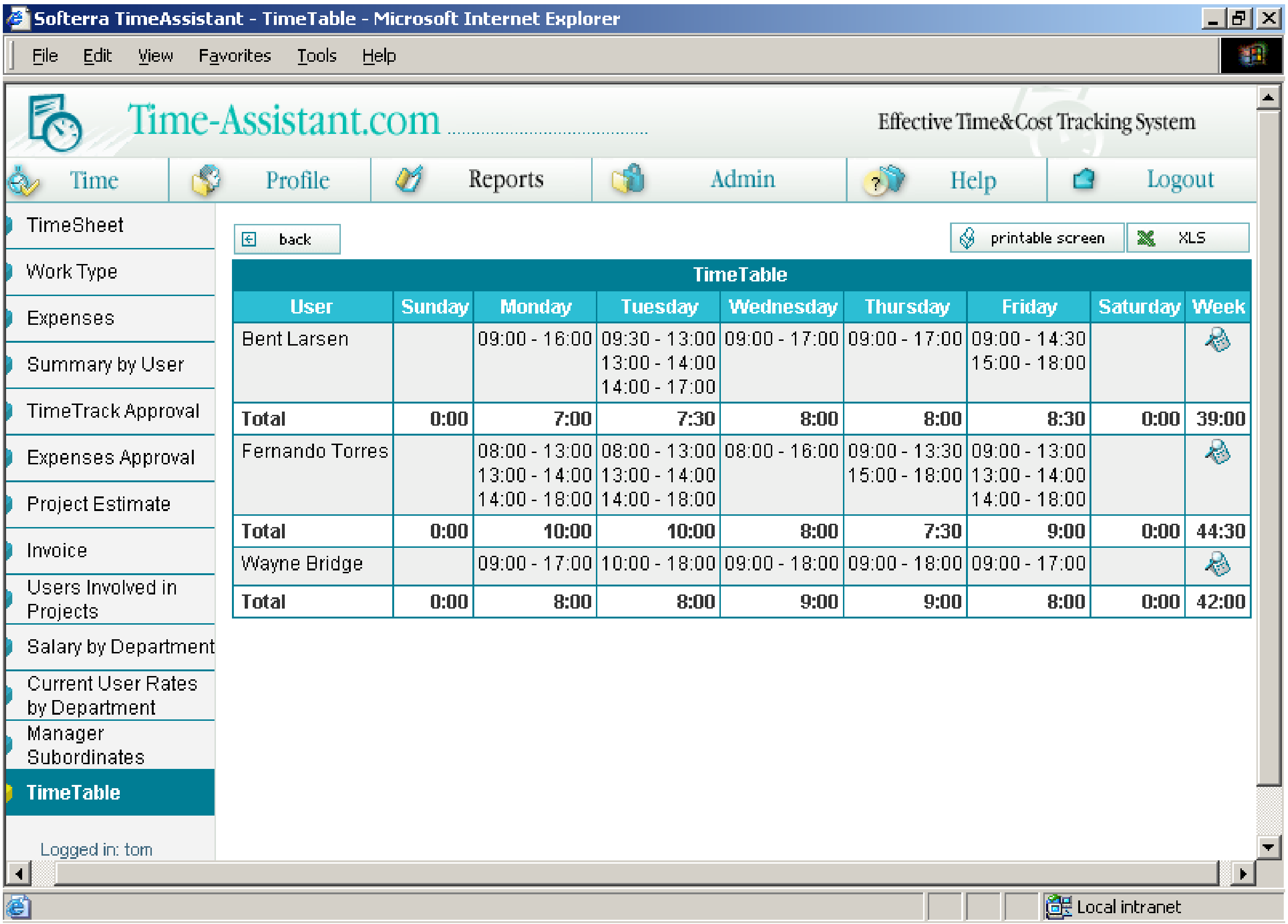
This report is available to all Time-Assistant users without limitations.

It allows getting information on daily hours for any number of the application users.



Select one or more users from the box and click SUBMIT to generate the report.

TimeTable Report



TimeTable								
User	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Week
Bent Larsen		09:00 - 16:00	09:30 - 13:00 13:00 - 14:00 14:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 14:30 15:00 - 18:00		
Total	0:00	7:00	7:30	8:00	8:00	8:30	0:00	39:00
Fernando Torres		08:00 - 13:00 13:00 - 14:00 14:00 - 18:00	08:00 - 13:00 13:00 - 14:00 14:00 - 18:00	08:00 - 16:00	09:00 - 13:30 15:00 - 18:00	09:00 - 13:00 13:00 - 14:00 14:00 - 18:00		
Total	0:00	10:00	10:00	8:00	7:30	9:00	0:00	44:30
Wayne Bridge		09:00 - 17:00	10:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 17:00		
Total	0:00	8:00	8:00	9:00	9:00	8:00	0:00	42:00

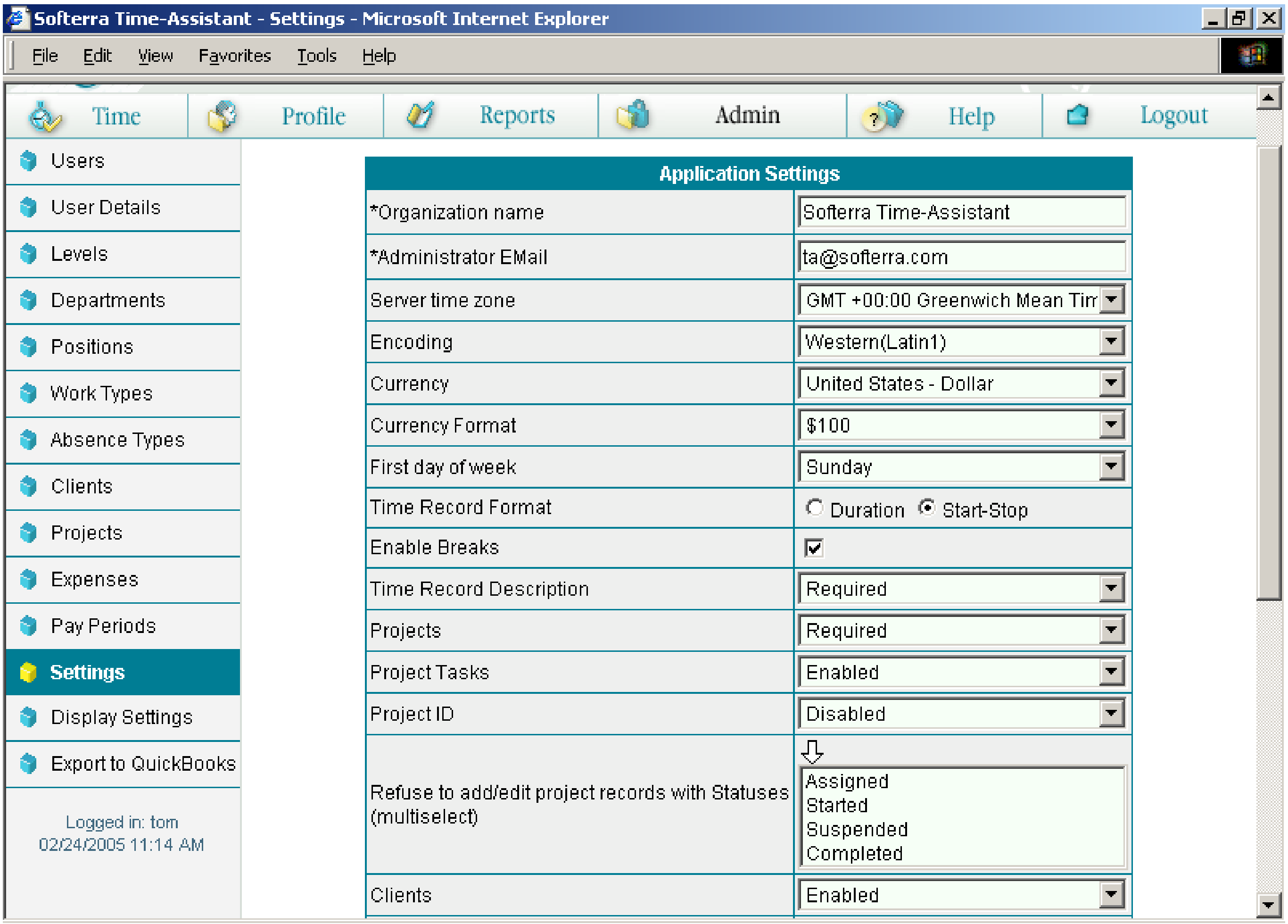
From this report, the Administrator and supervising managers can edit timetables of their subordinates by using Edit buttons located in the Week column on the right.

To export a report to an XLS file, click a corresponding button in the upper right-hand corner of the screen.

How Do I Change the Application Settings?

NOTE! EDITING AVAILABLE TO THE ADMINISTRATOR ONLY!

In order to access the Settings page, the Administrator should click the Settings button on the left-hand side navigation panel to display the following:



Here is a list of parameters that can be set or adjusted:

- Organization name (to be used in printable reports only)
- Administrator Email
- Server time zone
- Encoding
- Currency
- A day to start a week (e.g. Sunday or Monday)
- Time Record Format (Duration/Start-Stop)
- Enable Time Record Descriptions
- Enable Time Records Breaks

- Enable Clients
- Enable Client Rates
- Enable Projects
- Enable Project Tasks
- Enable Project ID
- Refuse to add/edit project/task records with selected statuses
- Enable Pay Periods;
- Enable Expenses
- Enable Expense Record Descriptions
- Enable Approvals
- Enable User Rates
- Enable Absences
- Enable Positions
- Enable User TimeTable
- Enable User Status (Status Center)
- Enable warnings in Work Type reports

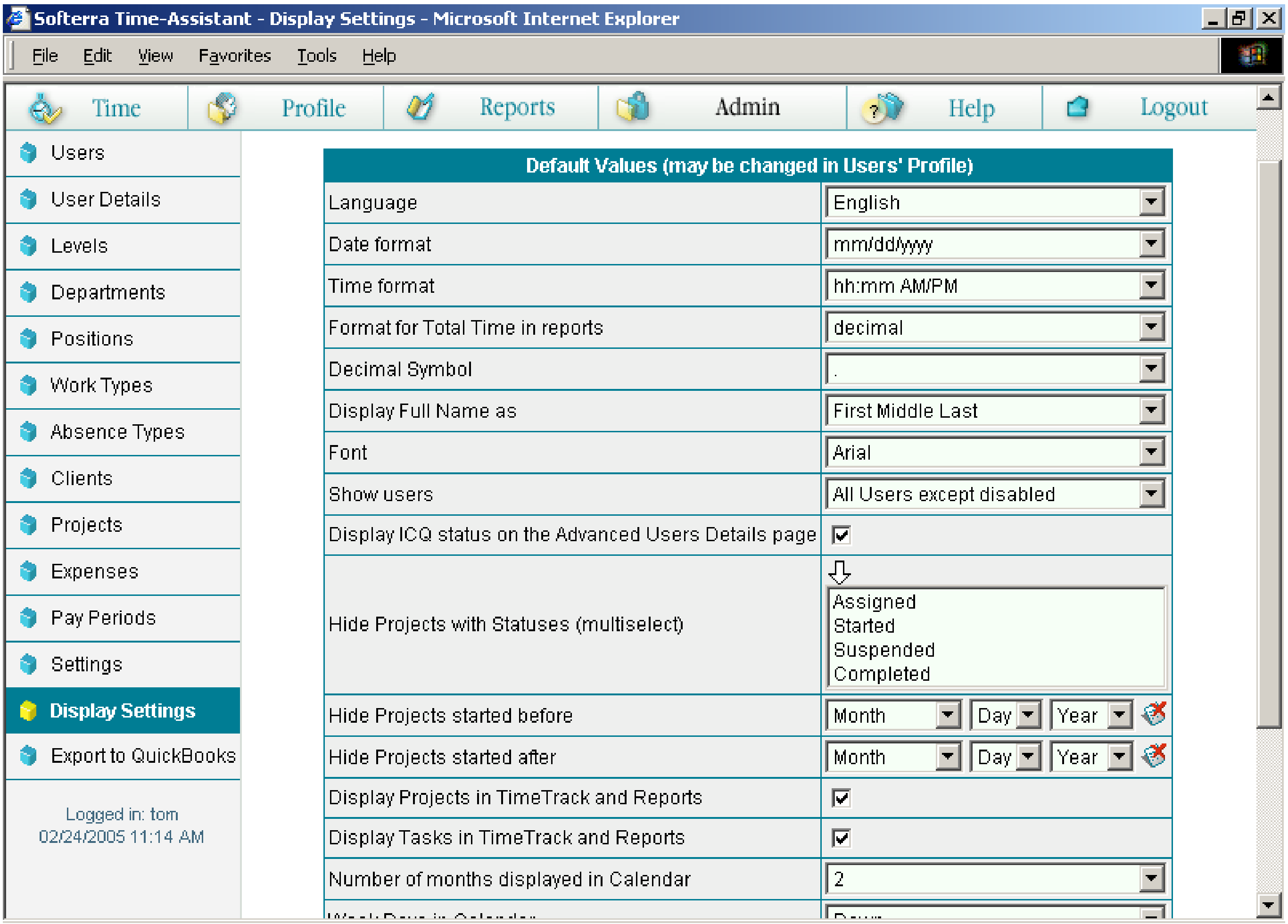
How Do I Change the Default Display Settings?

NOTE! EDITING AVAILABLE TO THE ADMINISTRATOR ONLY!

This chapter features the display settings to automatically become the ones by default for all newly added application users.

NOTE! Applying changes will just concern new users without affecting the existing user settings!

To get to the Display Settings, the Administrator should click the Display Settings button on the left-hand side navigation panel. The following page will be displayed:



Here is a list of parameters that can be set or adjusted:

- Default language
- Default date format (mm/dd/YYYY or dd/mm/YYYY)
- Default daytime format (AM/PM or 0 to 23 hours)
- Default total time format (HH:MM or decimal)
- Default decimal symbol (. or ,)
- Default Users and Clients Full Name format

- Font
- Default Users Filter
- Enable display of ICQ status on the Status page
- Enable display of project ID
- Enable display of Tasks in TimeTrack and Reports
- Projects filter
- Calendar properties
- Start page

How Do I Assign Holidays and Days Off in the Calendar?

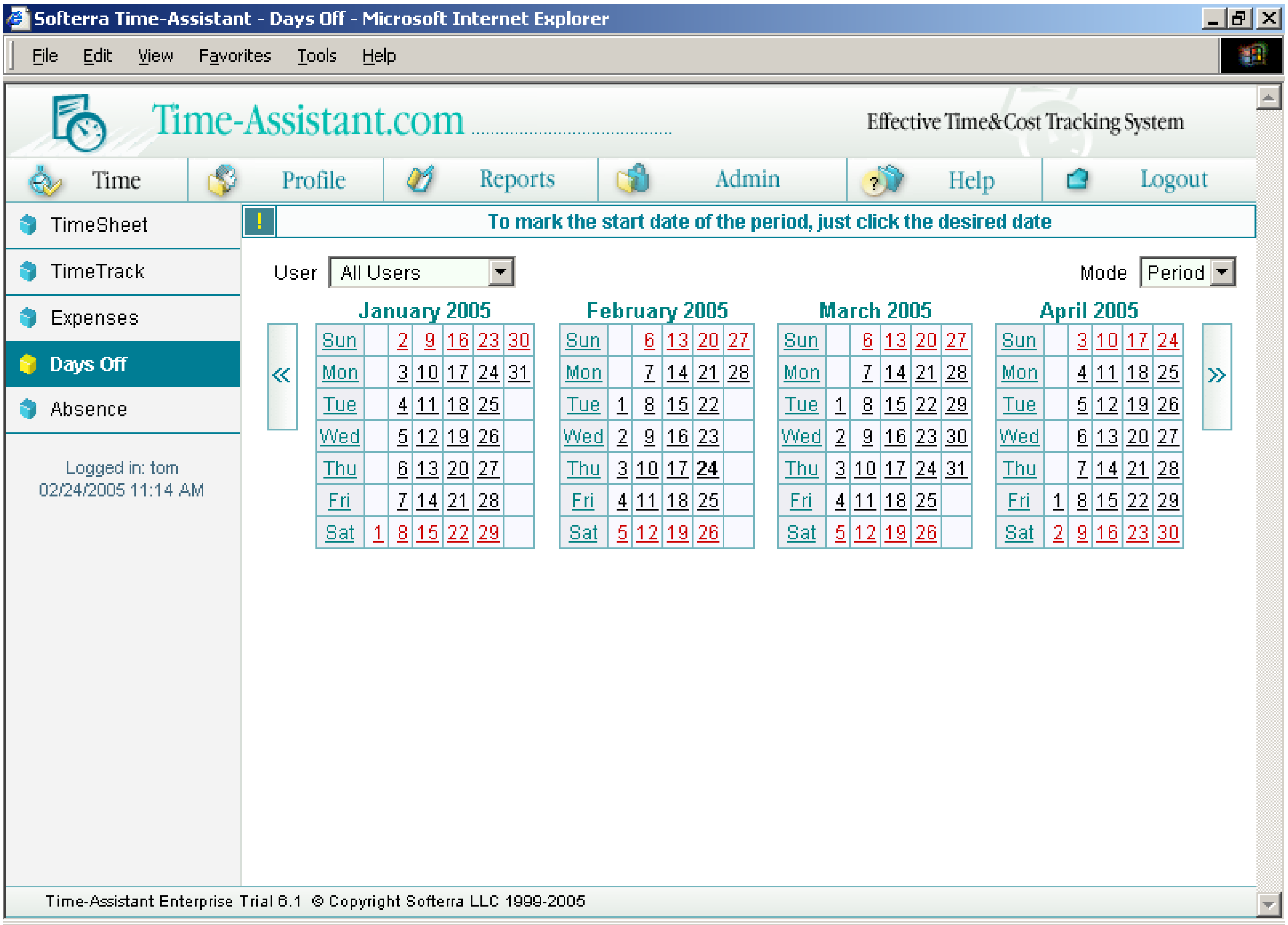
NOTE! AVAILABLE TO THE ADMINISTRATOR AND SUPERVISING MANAGERS ONLY!

The Days Off section has been designed for the purposes of a more convenient calendar display. It allows highlighting days off and holidays for all application users together (like in case with weekends, public or corporate holidays) or for any one particular user (when on vacation or on aleave) using a preferred color.

So, to mark or unmark a date, one should first get to the Days Off page via the Days Off button on the left-hand side navigation panel, and then click a desired date or a weekday to select all 4 or 5 of such days in a month. To unmark a day, just click it once again.

Permissions:

Administrator	Manager	Employee
Unlimited functionality – marking available for all days and all users, both on an individual and global basis	Global marking - available. Individual marking – for SUBORDINATES only	N/A

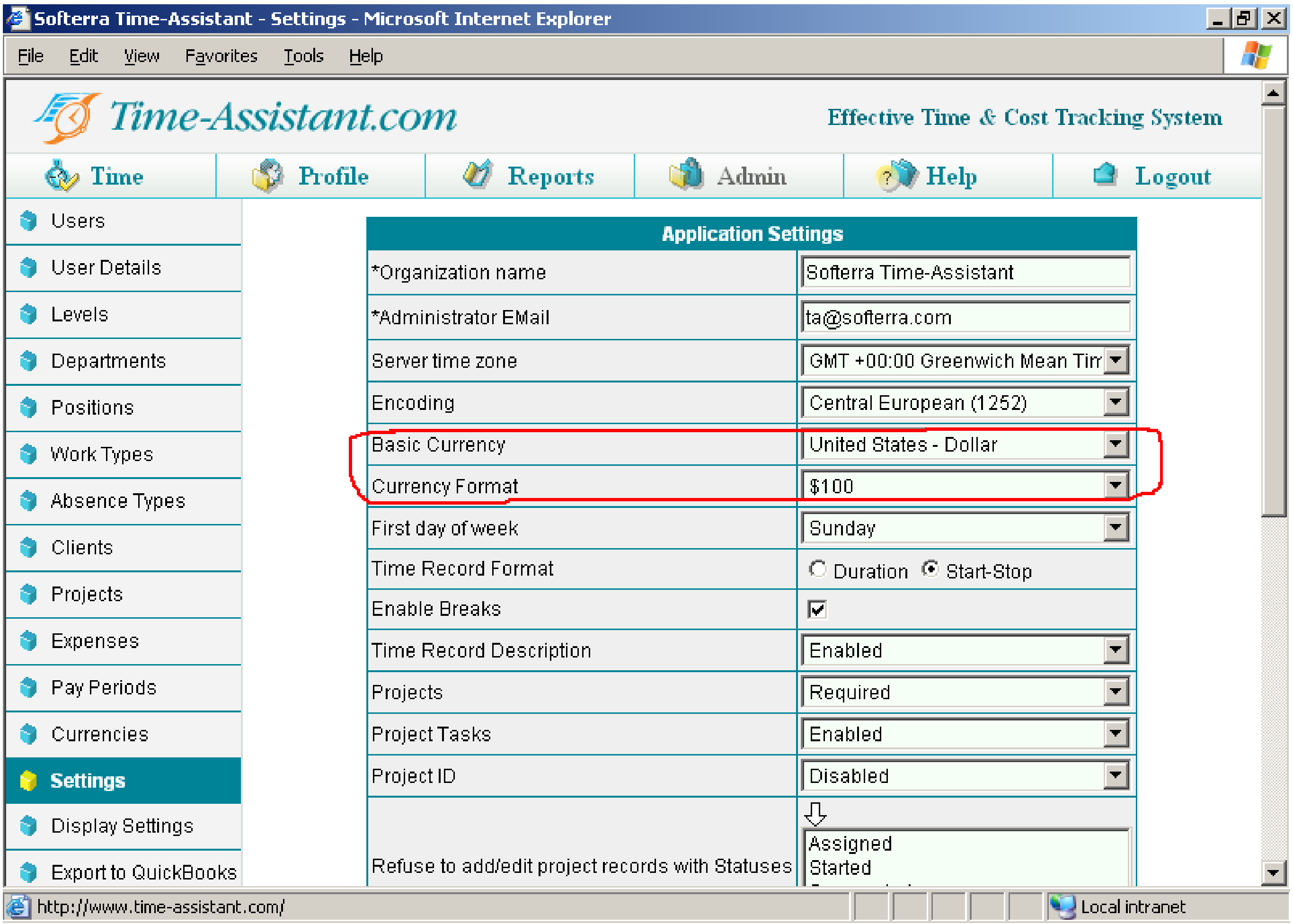


How Do I Manage Currencies?

Basic Currency

NOTE! AVAILABLE FOR ADMINISTRATORS ONLY

All calculations in Time-Assistant (salary, summary, invoices, etc) are performed using the basic currency. Basic currency can be specified on the Admin->Settings page. Usually, it is enough to have one currency in the application.

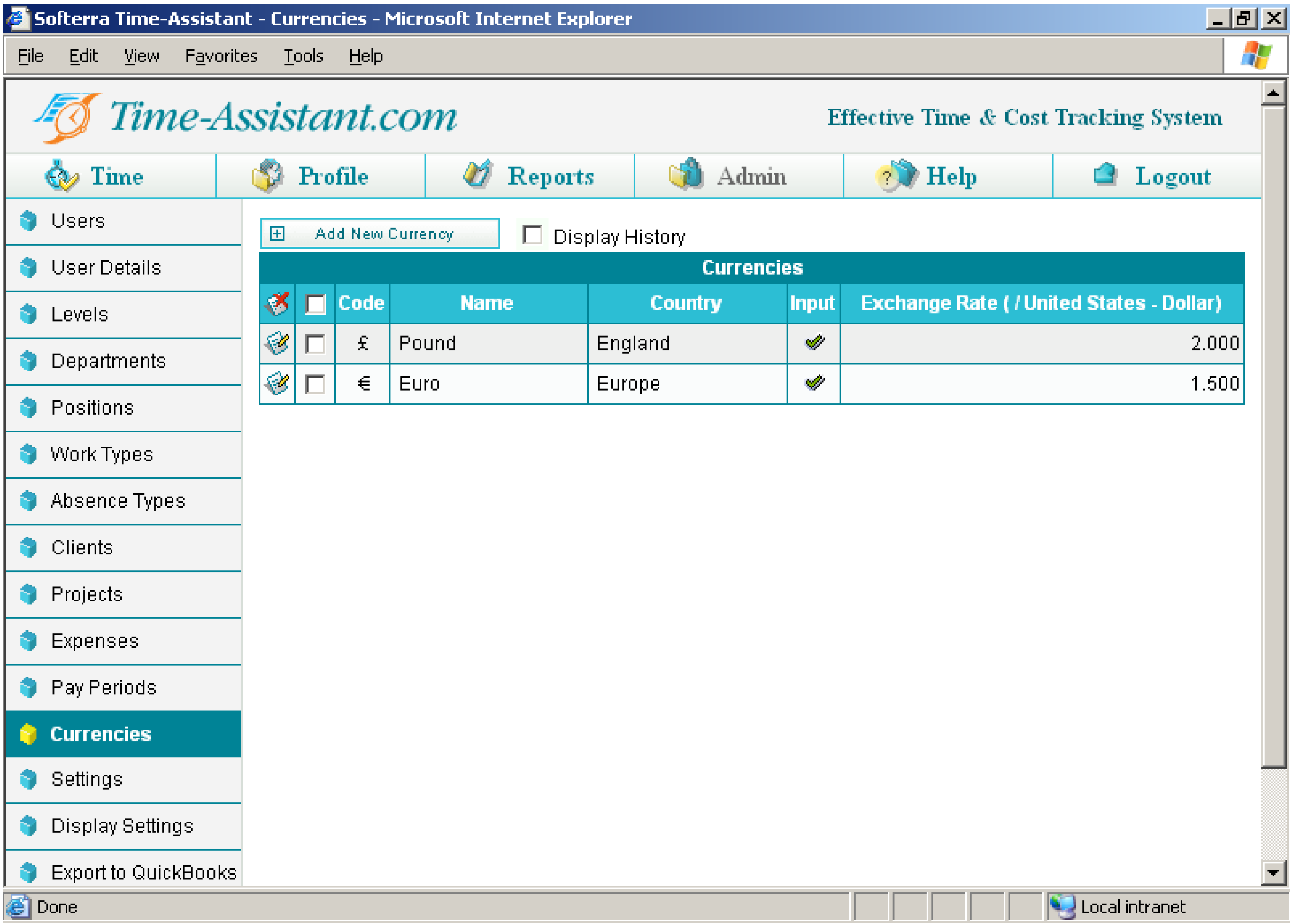


But sometimes it is convenient to support several currencies simultaneously. It is useful, for example, if users or clients are located in several countries or if users have business trips to different countries. If these countries have different currencies, it's possible to specify users' or clients' rates or expenses in corresponding currencies and then generate general reports in the basic currency using rates of exchange.

Managing Currencies

By clicking the Currencies button in the left-hand navigation panel in the Admin menu, users will navigate to the page featuring the list of Currencies (if any at the moment).

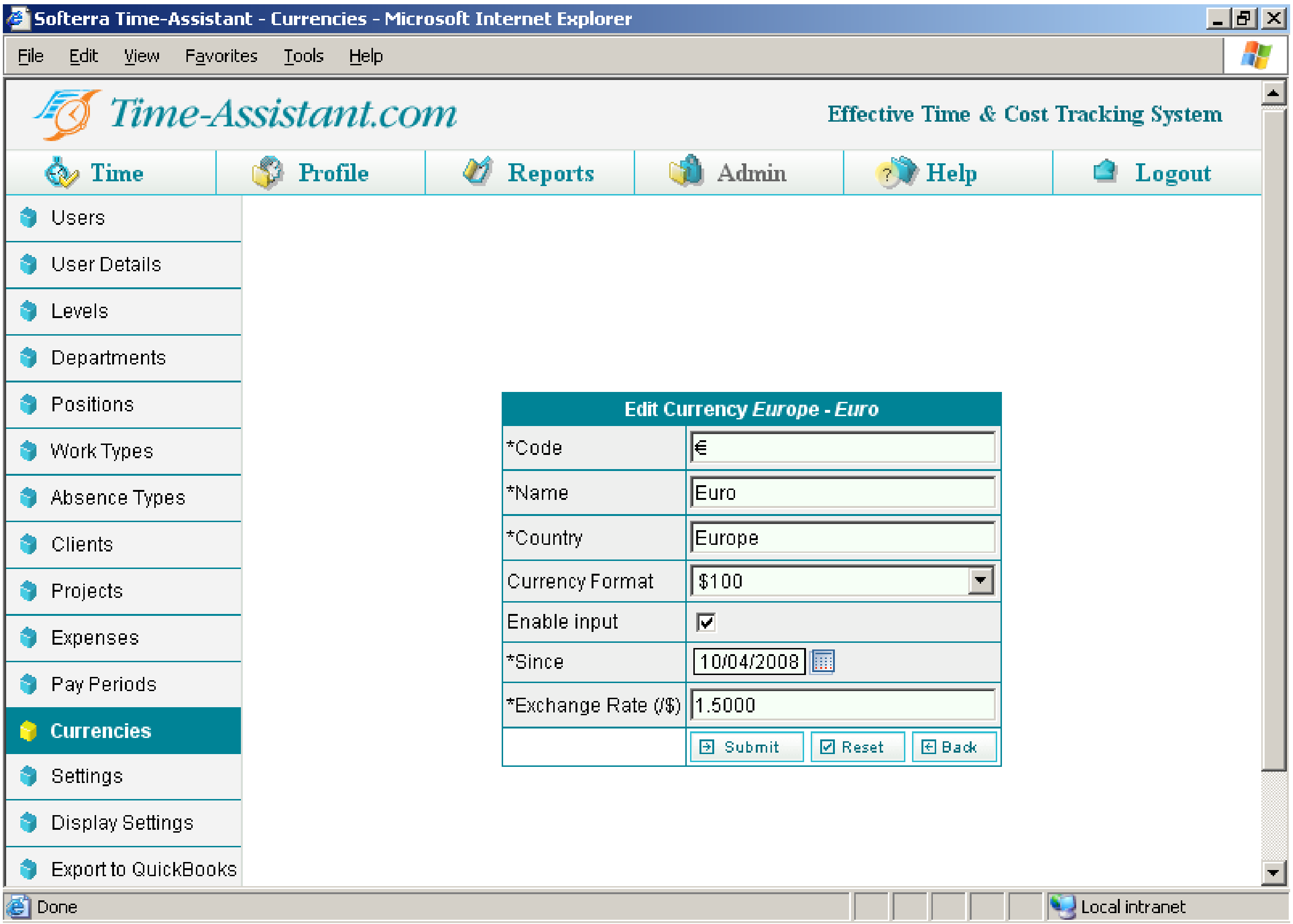
Only Administrators are authorized to manage Currencies. As to Managers and Employees, they are only allowed to view these pages.



To delete a Currency, tick a check box next to it and press Delete.

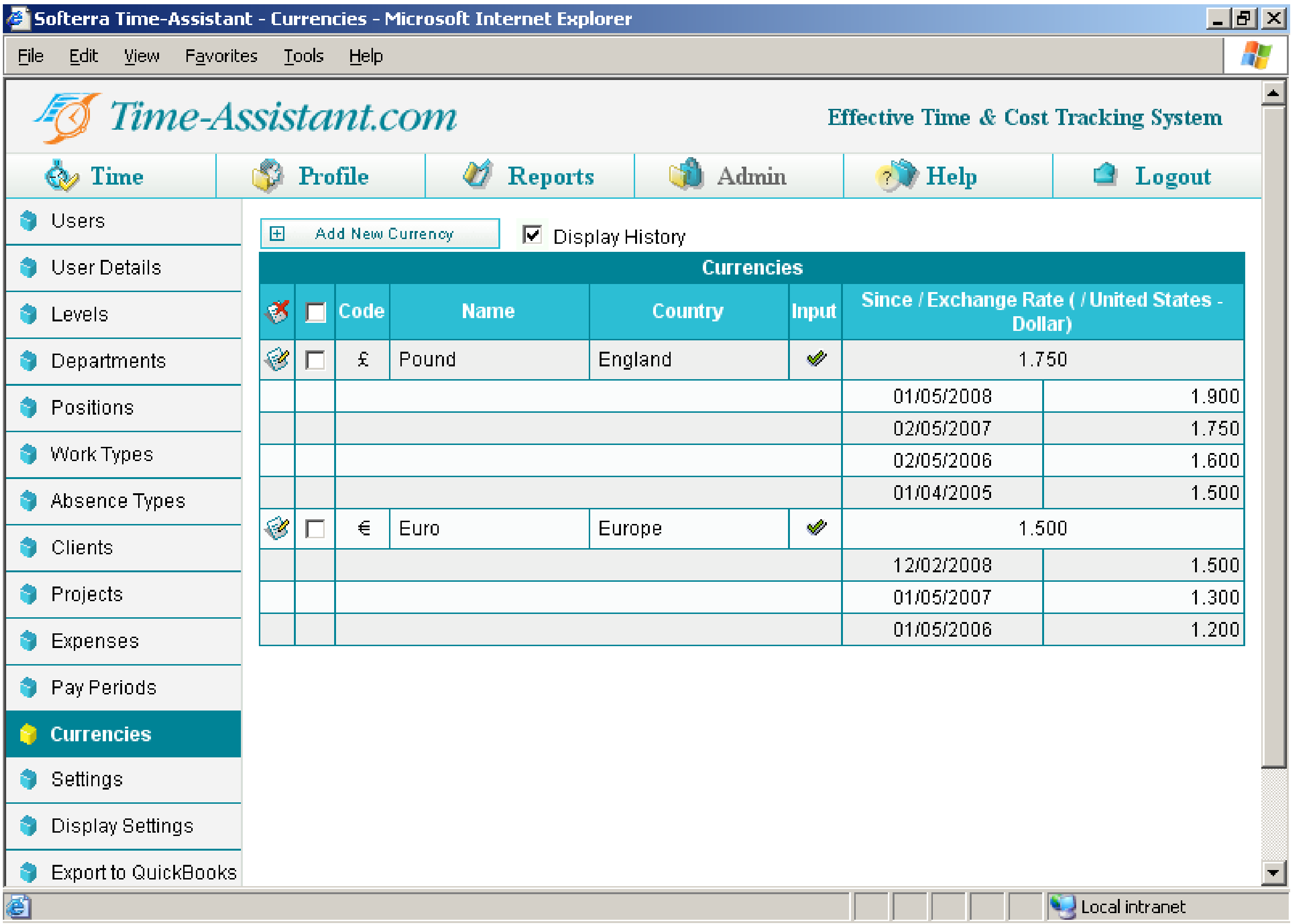
To add a Currency, click the Add New Currency button.

To edit a Currency, click the Edit icon to the left of the Currency name.



As you can see from the above screenshot, rates of exchange are specified on the Edit Currency page. The scheme is similar to the approach used for specifying User or Client Rates.

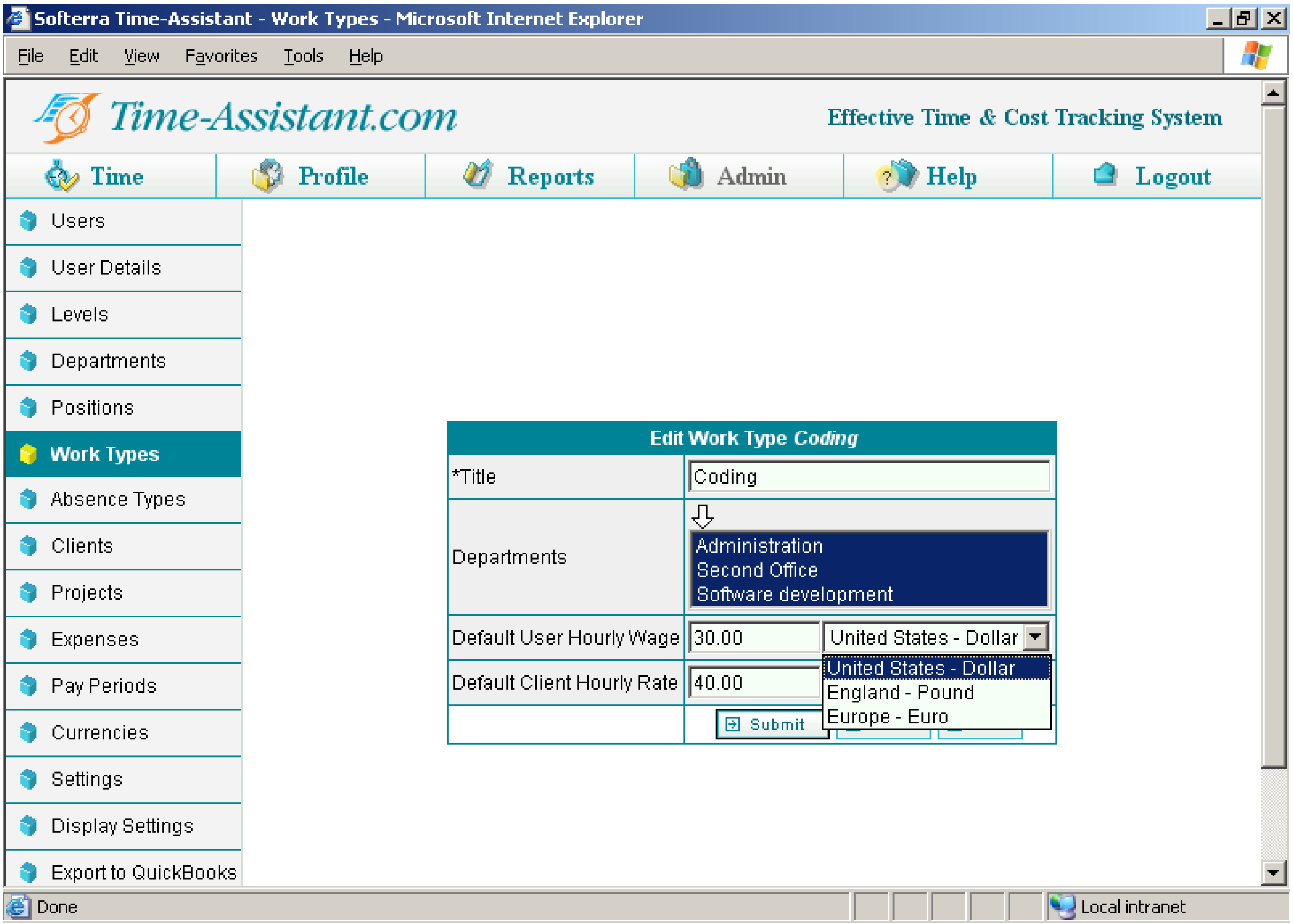
To keep track of Rates of Exchange History, check the Display History checkbox. You'll see the following screen:



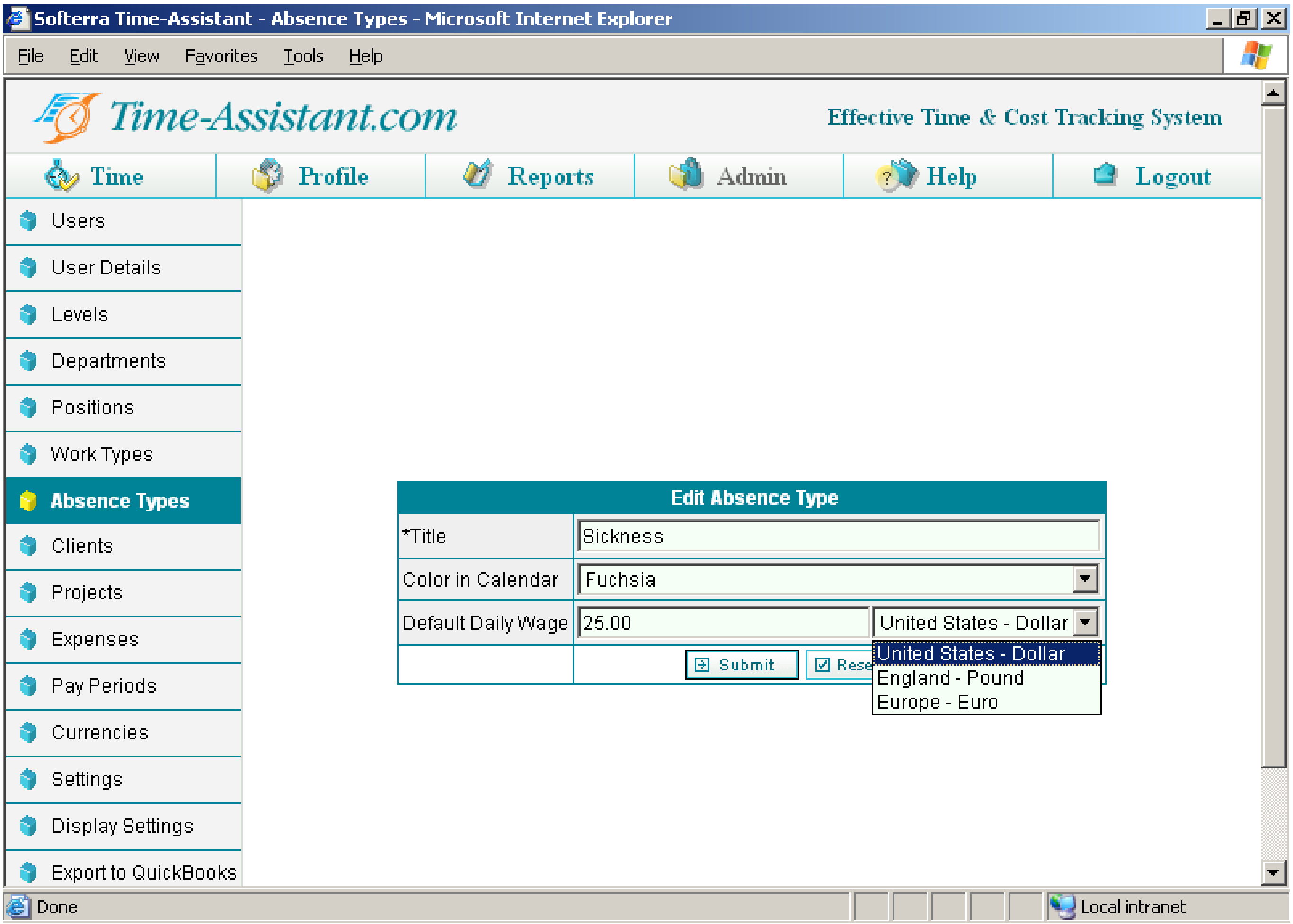
Where Can I Specify Different Currencies?

If more than one Currency is supported by the system, it is possible to specify different Currencies in the following features:

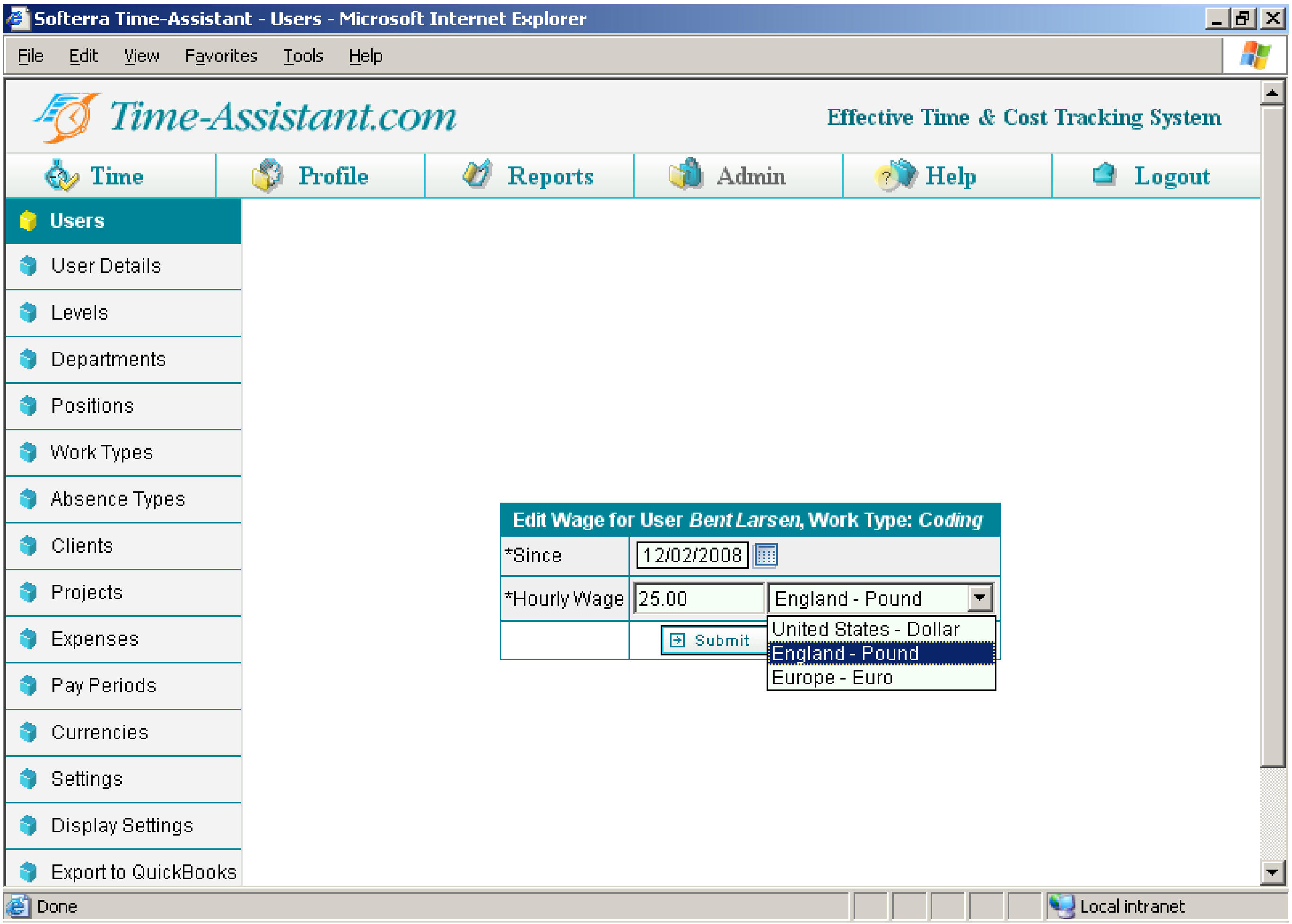
- Work Types – to specify Default User Hourly Wage and Default Client Rate


Softerra Time-Assistant - Work Types - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Time-Assistant.com
Effective Time & Cost Tracking System
Time
Profile
Reports
Admin
Help
Logout
Users
User Details
Levels
Departments
Positions
Work Types
Absence Types
Clients
Projects
Expenses
Pay Periods
Currencies
Settings
Display Settings
Export to QuickBooks
Edit Work Type Coding
*Title
Coding
Departments
Administration
Second Office
Software development
Default User Hourly Wage
30.00
United States - Dollar
Default Client Hourly Rate
40.00
United States - Dollar
England - Pound
Europe - Euro
Submit
Done
Local intranet

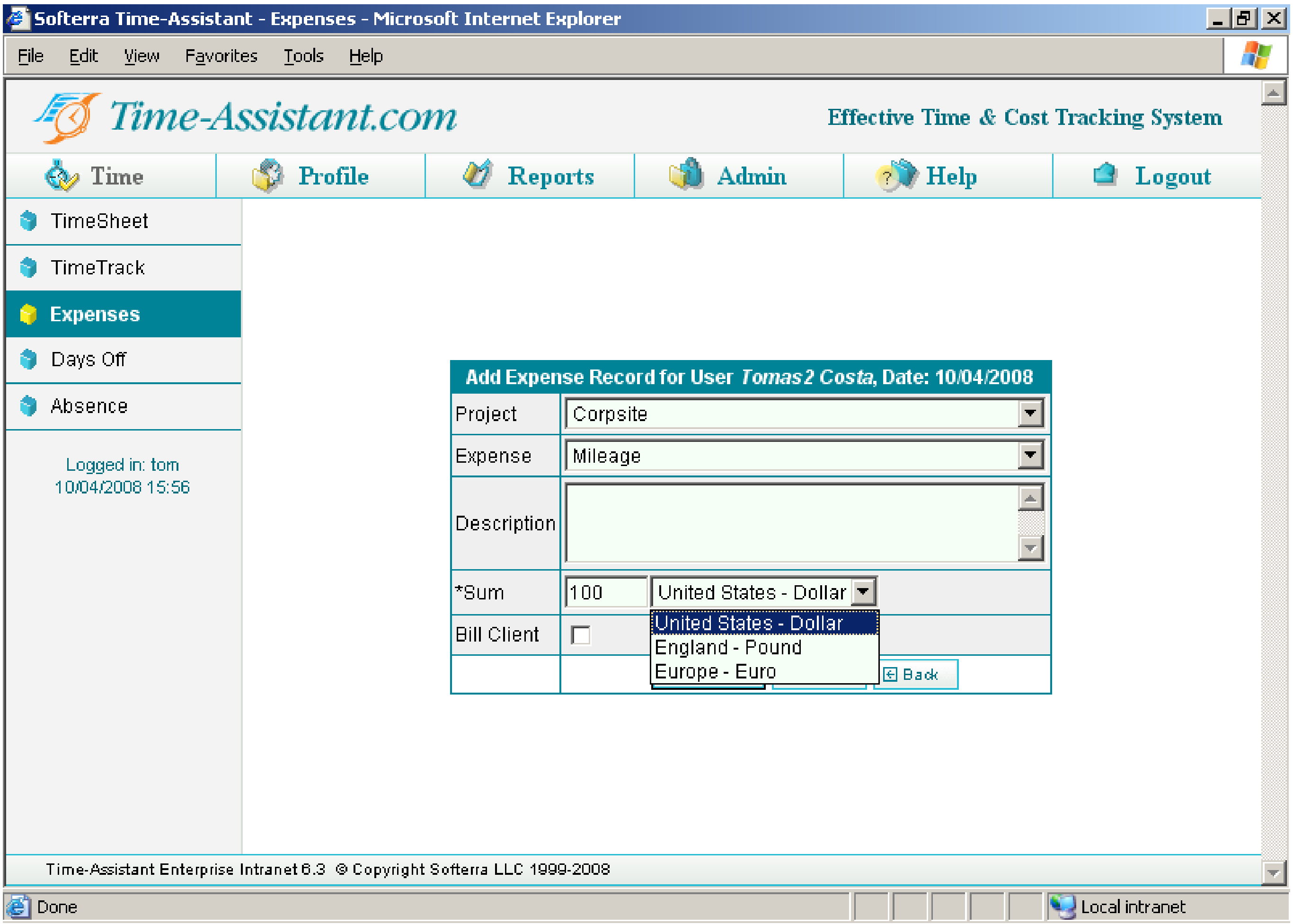
- Absence Types – to specify Default Daily Wage



- User and Client Rates



- Expenses



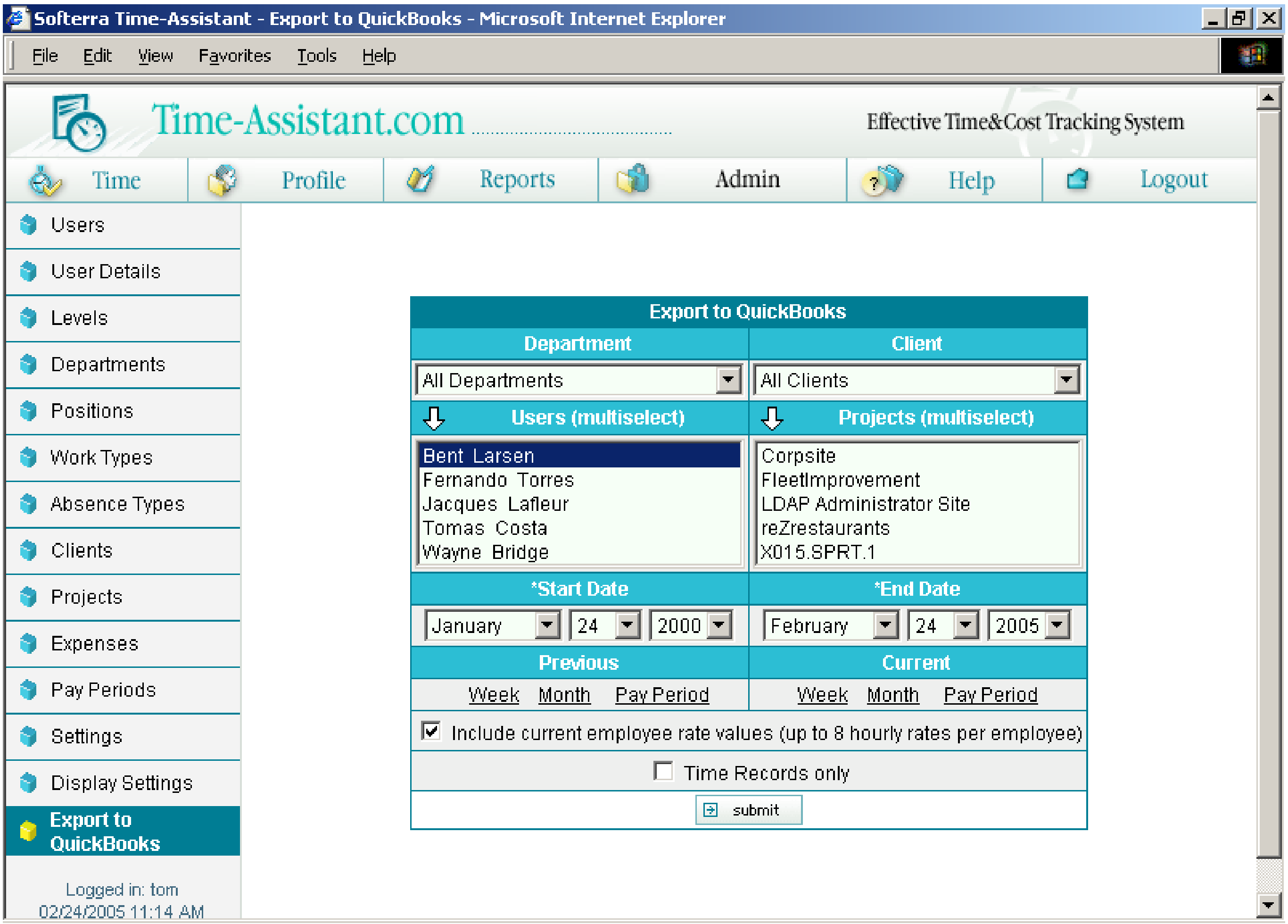
How Currencies are displayed in Reports?

All money amounts in all Reports except Current User Rates and Current Client Rates are displayed in the basic currency. The recalculation is made using exchange rates for corresponding periods. If the exchange rate is not specified, the recalculation is performed using coefficient 1.

How Do I Export the Application Database to QuickBooks?

It is just the Administrator alone who may export Time-Assistant data to QuickBooks.

Clicking the QuickBooks button on the left-hand side navigation panel in the Reports menu will result in displaying the following page.



On this page one will have to choose a project(-s) from a select box on the left and users – from the other one on the right (multiple selection available). Then set a sorting mode (either ‘by Projects’ or ‘by Users’) and a time interval, and finally click SUBMIT to confirm.

As a result, all the selected Users, Clients, Projects, Work Types, Current User Rates and User Timesheets will be exported to a QuickBooks format file.

How Can I Adjust My Intranet Logon?

It is possible to automatically log on to Time-Assistant via getting login from a web server variable. To enable this feature, please ask your system administrator to do the following:

- Open the include/database.inc.php file in a text editor
- Set the INTRANET_LOGIN_ENABLE parameter value to 1
- Set the HTTP_SERVER_USER parameter value to a name of the web server variable a user login is to be obtained from. This name varies for different web servers, e.g. in IIS it is LOGON_USER, while for Sun One Web Server - REMOTE_USER

The above procedure will make sure that upon your next log-on the login page will not displayed, with the user login name automatically obtained from the web server variable.

NOTE! Your web server should be configured accordingly for this purpose!

How Do I Get Help?

Clicking the Help item in the menu will open the pop-up User Manual window.

Feature Enhancements

FEATURE	Time-Assistant LIGHT	Time-Assistant STANDARD	Time-Assistant ENTERPRISE
Management			
Departments Management	+	+	+
Positions Management	+	+	+
User Management	+	+	+
Timesheet and TimeTrack	+	+	+
Division of Users by Categories	Employees, Administrators	Employees, Administrators	Employees, Administrators, Managers (any number of levels)
Manager Levels Management	-	-	+
Work Type and Rate Management System	-	+	+
Absences Management	-	+	+
Client Management	-	+	+
Client Rates Management	-	+	+
Client Logging	-	+	+
Project Management	-	+	+
Project Notifications	-	+	+
Project Tasks Management	-	-	+
Expenses	-	-	+
Currencies, exchange rates	-	+	+
Approvals			
TimeTrack Approvals	-	-	+
TimeTrack Approval Report	-	-	+
Expenses Approvals	-	-	+

Expenses Approval Report	-	-	+
Reports			
Timesheet Reports	+	+	+
TimeTable Report	+	+	+
Work Type Reports	-	+	+
Work Type Reports by Tasks	-	-	+
Absence Report	-	+	+
Summary Report by Employee	-	+	+
Salary Report per Department	-	+	+
Time Report per Department	+	-	-
Employees Involved in Projects Report	-	+	+
Current User Rates Report per Department	-	+	+
Current Client Rates Report	-	+	+
Project Estimate	-	+	+
Invoices	-	+	+
Manager Subordinate Employees	-	-	+
Expenses Reports	-	-	+
Other Features			
Status Center	+	+	+
User TimeTable	+	+	+
PDA support (Palm and WinCE)	+	+	+
Application settings	+	+	+
Personalized Profile	+	+	+
Export to XLS	+	+	+

Time Zone Support	+	+	+
Time and Date format support	+	+	+
Pay Periods	-	+	+
Custom Permission Settings for Employees and Managers	-	+	+
Personalized Display Settings	-	+	+
Multilingual Support	-	+	+
Currency support	-	+	+
Corporate, Public, Individual Holidays and Days Off in Calendar	-	+	+
Styles support	-	+	+
Export to QuickBooks	-	-	+
Intranet Logon	-	+	+

How Do I Evaluate Time-Assistant?

To get to know the Time-Assistant features better, please visit our official web site at www.time-assistant.com and log on to the application in the demo mode. You may choose to be either an administrator or an employee (see the site for details).