DOVICO Timesheet v11

QUICK START GUIDE

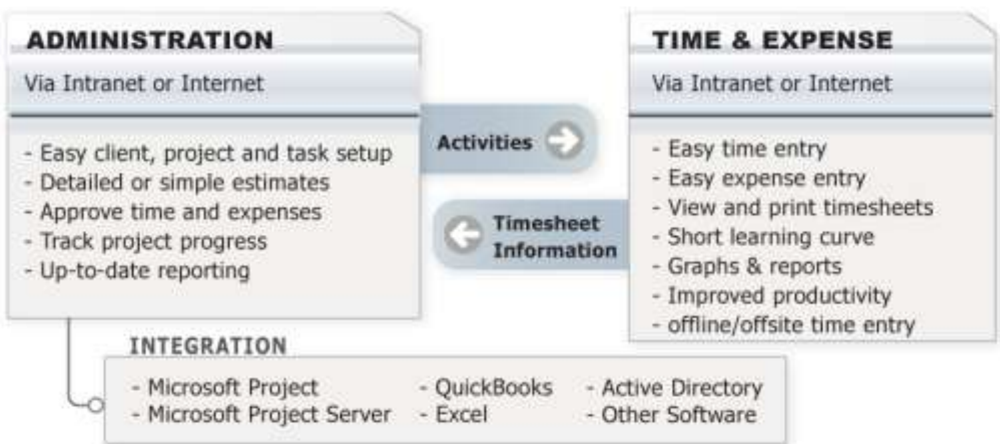
DOVICO
SOFTWARE

1 What is DOVICO Timesheet?

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

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

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



DOVICO Timesheet Components:

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

DOVICO Timesheet includes other useful tools:

- **Job Scheduler** used to automate some reporting and database functions.
- **Offline Timesheet** used by those not always connected to the database.
- **Database Manager** used for maintenance functions on the database.
- **Import-Export Tool** (XML, HTML, .csv, .txt)
- **Microsoft® Project & Microsoft® Project Server Synchronization**
- **QuickBooks® Synchronization**
- **Active Directory**: An integrated link to Microsoft's® Active Directory service allows employees to be imported from Active Directory and also authenticates DOVICO Timesheet login user IDs and passwords against Active Directory.

2 Installation

INSTALLING DOVICO TIMESHEET

Online 30-Day trial
No installation is required if evaluating DOVICO Timesheet using our Online 30-Day trial. Simply click on the *Login to DOVICO* link provided in the e-mail received following your completion of the sign up form and then go to the next page of this guide to get on your way.

A personalized database is created when using “Try It Free”. This database is available anytime during your 30 day evaluation.

Important things to note:

- Free technical support is available for your 30-Day trial period.
- Before using DOVICO Timesheet, popup blockers should either be disabled or have the site where DOVICO Timesheet is installed flagged as a safe site for your popup blocker.
- DOVICO Timesheet is delivered with a demo database to help you review and familiarize yourself with the software. A blank database can easily be created using the Database Manager.
- DOVICO Timesheet’s Database Manager and Data linking tools (Import/Export, QuickBooks®) are only available when the software is installed on your server.

Installed 30-Day trial
If you have chosen to download and install DOVICO Timesheet on your computer or server, then review the **Installation Guide** located at http://www.dovico.com/web_timesheet.aspx for system requirements and instructions on the installation process. Then go to next page of this guide.

3 Administrative Functions

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

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

LOGIN IN

If evaluating DOVICO Timesheet using our 30-Day Online trial, click on the *Login to DOVICO* link provided in the e-mail received following your completion of the sign up form. The first time you login, you will be brought to the Welcome to your Trial screen which offers quick access and video tutorials to the key areas of the software.

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

If evaluating after **downloading** and installing the software, locate and click on **DOVICO Timesheet** (located under Start/All Programs/DOVICO Timesheet). When you start DOVICO Timesheet for the first time, the software will prompt you to create an Administrator Account for your personalized demo database. Your database will be accessible for 30 days.

NAVIGATING WITHIN DOVICO TIMESHEET™:

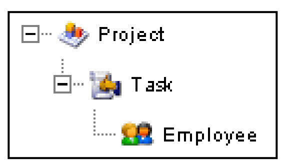
DOVICO Timesheet offers access to all views and tools through the **Menu** button located in the upper left corner.

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

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

General Requirements

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

Employees	In DOVICO Timesheet, anyone who enters time and expenses, or who manages, monitor or reports on project activities is considered an **Employee**. The Employees list pane (*Menu > Views tab > Employees & Projects > Project Assignments*) is the location where employees using the software are listed and can be added or edited. For each employee, a profile stores their user id, password, security level, their pay/charge out rates and many more useful details.
Projects	**Projects** are the combined endeavors undertaken to create a unique product, service or result. A project is a mandatory component required for time tracking. Project information can include details such as a project manager, project start/end dates and project status. Projects are added and edited from the Assignment tree in the Project Assignments tab (*Menu > Views tab > Employees & Projects > Project Assignments*).
Tasks	**Tasks** are activities or work efforts against which employees track their time. Tasks are mandatory components required for time tracking. The Tasks list pane is the location where tasks are listed and can be added or edited. (*Menu > Views tab > Employees & Projects > Project Assignments*)
Assignments	**Assignments** are the unique links between projects, tasks, and employees that define how a project is organized for time entry. Assignments must be created before employees can begin tracking their time.  *Simplified assignment structure* The Project Assignments tab is where assignments are created and managed. Assignments made in this view appear in DOVICO Timesheet's time entry view with each employee only seeing the specific projects and tasks that have been assigned to them. (*Menu > Views tab > Employees & Projects > Project Assignments*)

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

(Optional)

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

SPECIFIC GOALS

Are projects on time and on budget?

Budgeted Time & Costs	The **Budgeted Time & Costs** tab is used to establish detailed company and client cost budgets (estimates) and for those tracking actual time and costs against estimates. (*Menu > Views tab > Employees & Projects > Budgeted Time & Costs*)
Reports Explorer	The **Reports Explorer** view is used to display a wide variety of time and cost reports. For example; locate and double click on the **Project Time & Costs** report (located in the Time and Costs / Client and Company Costs folder) to view one of the many available reports. (*Menu > Views tab > Reports Explorer)*

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

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

Track time and expenses to accurately bill clients?

Clients	**Clients** are companies, business units, or individuals for whom work is performed. Clients can be linked to specific projects if time or expenses associated with projects are billable. Clients are added and edited from the Assignment tree in the Project Assignments tab. (*Menu > Views tab > Employees & Projects > Project Assignments tab)*
Approved Expenses	The **Approved Expenses** view is used to review or edit expense information. (*Menu > Views tab > Approved Expenses)*
Reports Explorer	The **Reports Explorer** view is used to display a wide variety of costing and billing reports. The **Client Time and Costs** report (located in the Time and Costs / Client and Company Costs folder) provides a summary of actual hours worked, and the client and company costs. (*Menu > Views tab > Reports Explorer)*

4 Time and Expense entry

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

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

Time and Expense entry views are available to all employees tracking their time and expenses. To quickly learn how to enter time, access DOVICO's free On Demand Training by clicking on the **Training** button from the Login screen.

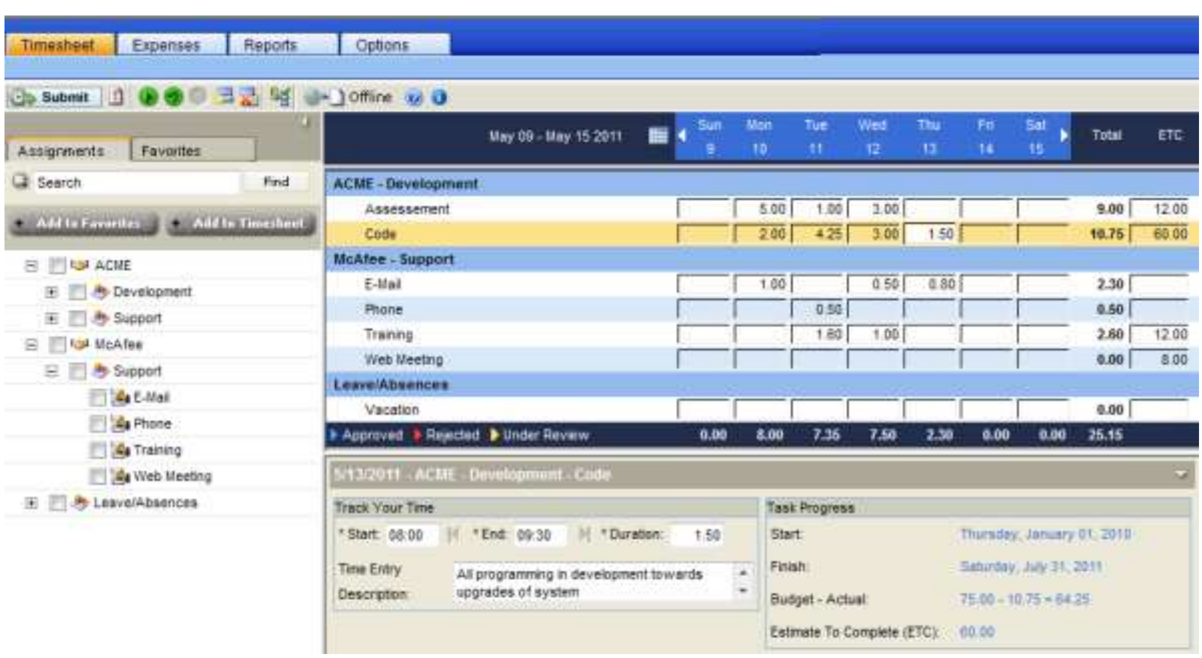
HOW EMPLOYEES ENTER TIME AND EXPENSES

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

To enter time against a task:

The time entry screen is accessed by clicking the Timesheet tab near the top of the screen.

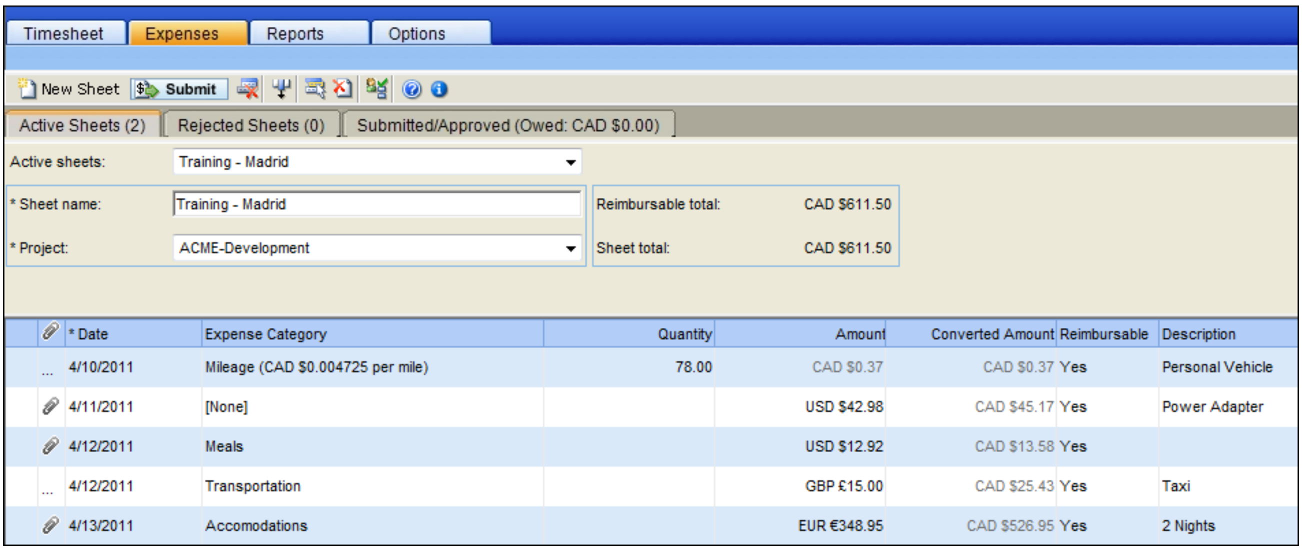
1. Check the **task assignments** you wish to track time against (from the assignment tree on the left).
2. Add these to the weekly grid by clicking the **Add to Timesheet** button.
3. In the timesheet grid, click in the **cell intersecting** the appropriate **task** and **day of the week**.
4. Enter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



To enter an expense:

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

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



5 Contact Information

SALES SUPPORT

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

By Telephone:

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

Sales - International toll free number: 00 800 4618 8463

Through the Internet:

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

By Fax:

Sales Fax North America: 1-506-384-0727

Sales Fax United Kingdom: +44 (0) 1625 429888

TECHNICAL SUPPORT

Through the Internet:

Support email: support@dovico.com

Online Knowledge base: http://www.dovicofiles.com/kb

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

Detailed Installation Guide: http://www.dovico.com/web_timesheet.aspx

By Telephone:

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

Toll Free International: 00 800 4618 8463

Direct: 1-506-855-4477

Fax: 1-506-384-0727

Manuals, Instruction Guides, and other information: http://www.dovico.com/web_timesheet.aspx

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