

# OroTIMESHEET

## OroTimesheet User Guide

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# OroTimesheet User Guide

## Presentation

OroTimesheet is a time tracking application that is both comprehensive and easy to use. Developed in 1996, OroTimesheet is now used by thousands of users in over 80 countries. It is undeniably a choice solution for efficiently and intelligently tracking your diverse projects.

OroTimesheet is a cloud computing web app. You can access the application using a desktop computer, a tablet, or a smartphone. OroTimesheet is available 24/7. No installation is required; all you need is an internet connection to use OroTimesheet.

Primarily, OroTimesheet allows you to record the amount of time that each of your employees dedicates to your company's various projects. Normally, the time is entered by the employees themselves via the Timesheet or the Timer option. However, OroTimesheet does not just allow you to enter the amount of time spent on a project; it allows you to do much more.

With OroTimesheet, you can also track costs and billing. You can even invoice your customers directly using OroTimesheet, if you so desire. Many other options are also available with OroTimesheet if you would like to, for example, track your employees' time banks (time accumulated, vacation, sick leave), track project budgets or track expenses, to name a few.

OroTimesheet is also very flexible. You can adjust your OroTimesheet settings according to your needs. For example, you can add additional fields (referred to as "User defined fields") to manage information specific to your company or even personalize existing reports in order to extract information in your preferred format.

In short, with OroTimesheet, you can take advantage of many other functions not mentioned here. You will be pleasantly surprised by how easy they are to use.

On that note, we would like to thank you for using OroTimesheet. Enjoy!

The OroTimesheet team

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## Starting off on the right foot

### Time tracking per project

Time tracking per project involves recording the amount of time that each of your employees spends completing different types of activities on different days. Then, once the information has been recorded, data extracts in the form of reports, and more, can be produced to help you manage payroll, billing, costs, statistics, and decision-making, for example.

In OroTimesheet, information is easily recorded under the **Timesheets** tab. A timesheet contains all of the time transactions recorded for an employee in one week. Every time transaction must contain, at a minimum, the following information: the day, the employee, the project, an activity type and the amount of time.

An employee can enter as many time transactions as necessary during the same day. For example, if on January 17, 2015, John worked on 2 different projects and completed 2 different types of activities for each project, he must enter 4 time transactions for January 17. (Here we are assuming that John spent 2 hours on each activity type for each project.)

January 17, Project A, activity type X, 2 hours  
January 17, Project A, activity type Y, 2 hours  
January 17, Project B, activity type X, 2 hours  
January 17, Project B, activity type Y, 2 hours

Total: 8 hours.

That's all there is to it! Now you know OroTimesheet's basic operation.

### OroTimesheet: Easy as 1, 2, 3

Before being able to create timesheets, you must first enter your employees, create your list of projects and enter your types of activities. When creating timesheets, in addition to entering the amount of hours worked, the employee must also indicate the project and the activity type completed.

Before being able to enter timesheets into OroTimesheet, you must enter some basic information into the software.

- 1- Enter your employees, customers and projects, as well as the different types of activities that you will complete on each project.
- 2- You or your employees will then be able to create your timesheets.
- 3- Once the timesheets have been created, you can bill your customers using the Invoices option or print reports for management purposes.

### Where do I start?

We would suggest simply continuing to read the chapters in this document in the order presented. The order was intentionally chosen to allow you to learn how to use the software from beginning to end. If you are already familiar with the software, you can easily go directly to a specific chapter for more information on a given topic. In the next chapter, we invite you to continue configuring the application.

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## Configuring the application

### Information about your company

To start off on the right foot, take a **few moments to enter some specific information about your company**. To access this option, click on the **More** tab and then select the menu **Configuration | Information about your company**.

The information that you enter in this option will mainly serve to display your invoices when you wish to use OroTimesheet to bill your customers for the hours worked.

If you do not wish to generate invoices using OroTimesheet, we nevertheless recommend taking the time to enter the information about your company. In effect, this information is also used for other OroTimesheet functions. Don't forget to also add your company logo, if you have one.

Click on the **Save** button if you would like to save the changes you have made.

### Configuring the application

This option allows you to personalize certain application settings. To access this option, click on the **More** tab and then select the menu **Configuration | Application configuration**.

This option is divided into several sections.

#### Regional settings

Begin by selecting your preferred language. The language choice currently does not affect the software's functionality. It is mainly used by us to know in which language you would like us to communicate with your company.

Next, please specify your time zone according to your geographic location. Specifying your time zone allows the application to know the current date and time according to your location. This information is used by some of the software's functions. Please note that this will not prevent employees from being able to enter their hours in different time zones.

Now select the date, time and number formats, as well as the currency that you wish to display on the screen or print in reports or on invoices. These options do not change the way the software behaves, but will allow you to display information in your preferred format. You can also select the desired paper format (Letter or A4) to print reports or invoices.

**Tip:** Please note that OroTimesheet does not perform currency conversions. The currency you select here is solely used for aesthetic purposes when displaying amounts. When entering amounts or generating invoices, no currency information is stored in the database. Only numbers (without currencies) are recorded.

To finish, specify the first day of the week. The day that is specified here determines the first day that will be displayed in the timesheet (**Timesheets** tab). This also indicates when the week begins when updating time banks.

#### Work shifts

When entering hours, if you wish, your employees can specify the work shift during which they were working. The name of each work shift can be personalized in the **Work shifts** section.

#### Invoicing

This section allows you to personalize certain settings if you also plan to use OroTimesheet to generate

invoices for your customers.

Specify in the field **Next Invoice#** the number that OroTimesheet should use to begin numbering invoices.

Each invoice can have a specific status among 5 different statuses. Here you can determine the description of each status.

The field **Message to print at the bottom of invoices** allows you to enter the text that you want to automatically appear at the bottom of each invoice when printing. This text is automatically displayed on all invoice templates already included with OroTimesheet.

In the section **Tax#1**, enter the name of the tax (ex: GST in Canada, VAT in France, etc.) and the tax number, if you would like it to appear on the invoice.

In certain countries or regions, there are two taxes to be calculated on invoices, such as the QST in Quebec, which is calculated in addition to the GST. If this is the case, check the box **Activate tax #2** and then enter the information concerning the second tax. Be careful when selecting the way in which the second tax must be calculated by selecting the appropriate option in the field **Tax #2 formula**.

Tip: To manage tax rates, access the option **Tax rates** available under the tab **More**.

Tip: Please note that once the invoices are generated, it is possible to go back and adjust invoices manually, whether amounts or tax percentages.

To finish, don't forget to click on the **Save** button if you've made changes in this option and you would like to save them.

### **API (Application Programming Interface)**

Check this option to allow access to data via the API. See the API documentation for more information.

### **Sending emails**

This section allows you to configure some settings when the application sends e-mails.

### **Notifications**

You can indicate to OroTimesheet to automatically send an email to employees who have not yet entered their time in the application for the current or previous week. This is especially useful when one or more employees have forgotten to enter their time.

To enable this option, check the box **Automatically send an email to the employee when no time has been entered for a week** and then adjust the desired options such as the day and time at which you want the e-mails be sent as well as the subject and the message to be sent.

## Employees

Before being able to create timesheets, you must first enter your employees, create your list of projects and enter your types of activities. When creating timesheets, in addition to entering the amount of hours worked, the employee must also indicate the project and the activity type completed.

Let's start with the employees:

To manage your employees, select the **Employees** tab. From this option, you will obtain the list of

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employees.

Simply click on the **New employee** button to add a new employee or click on the name of the employee in the list to access the employee's file. From the employee's file, you have access to all of the relevant information that you can consult or modify.

When adding an employee, you must enter a name, email address and password, at a minimum. This information is mandatory. Note that the name and email address must be unique, meaning, no two employees can have the same name and email address in the software. When the new employees access the application, they must enter the email address and password that you have entered.

**Tip:** Once logged in to the application, employees can change their password from the **Change my password** option under the **More** tab. Employees who forget their password can also reset it by clicking on the **Lost password** link from the application login screen.

All other information in the **General information** section is optional, but some fields will help simplify management of your employees, especially if you have a large number of employees to manage.

For example, the **Base group** field allows you to specify the employee's default group. You will notice later in the documentation that an employee can be a member of multiple groups but its main group is always the base group. This base group is specifically used when updating the time banks. In effect, since time bank updates are completed by group, the employee's base group is used in this case.

To add new groups or to manage groups, access the **Employee groups** option under the **More** tab. Consult the section on **Employee groups** later on in the documentation for more information about managing groups.

The **Category** field allows you to specify the employee category. Categorizing employees is not mandatory. The employee categories are simply another way to group employees. For example, from the list of employees, you can filter employees based on one or several categories so that only those categories appear on the screen. Another option would be to indicate in a report that you would like a subtotal per employee category when printing a report that displays the time worked per employee, for example.

In short, if you wish to use the employee category function, access the **Categories | Employees** option from the **More** tab to manage the list.

The other fields (**SIN/NIN/SSN**, **Hire date** and **Notes**) are for information purposes only and do not change the software's functionality.

### Employee type:

In OroTimesheet, there are two employee types (or user types): **Employee** or **Software user only**. In simple terms, an Employee can have timesheets while a Software user only cannot have any timesheets.

For example, create a Software user only for users that supervise employees, or administrative personnel, who don't need to enter timesheets themselves.

**Tip:** You do not need to have a subscription for Software users only type users. Access to the application for this type of user is free. Subscriptions are only required for Employee-type users (employees who must have timesheets).

Note that you can, if necessary, change the employee type to a Software user only and vice versa.

## Accessing the application

An employee is active by default. Active employees may access the software using their email addresses and passwords. If you wish to suspend an employee's access to the application, simply select the **Inactive** option in the **Status** field.

Tip: When an employee leaves your organization, simply set the status to **Inactive**. This employee will no longer be able to access the software. In addition, you can keep a complete history (timesheets, etc.) of this employee in the software. Since inactive employees are not taken into consideration for subscriptions, you can add a new employee to replace the inactive employee without changing the number of employees in your subscription.

The field **Access rights** allows you to specify the employee's access rights in the software. By checking the option **This employee has all rights in the software**, this systematically gives the employee all of the rights to all of the software's functions. Normally, only some users in your organization should have this right. When this option is selected, all of the other options in the **Security** section become disabled because the employee has all of the rights.

If, instead, you check the option **This employee only has the following rights**, the other options in the **Security** section will be activated and selectable so that you can specify the rights you wish to attribute to the employee in the software.

By default, when adding an Employee-type employee, if you do not check the box **This employee has all rights in the software**, the employee will not have access to information about costs or billing when entering timesheets. In effect, both of these boxes are unchecked by default. This is normally what most employees request. (Note that this is only useful if you plan to track costs and/or billing in addition to tracking the time worked.) Check these boxes if you wish to give the employee access to this information when entering timesheets. The box **Enter expenses** allows you to indicate if you want employees to be able to enter expenses in their timesheets. This box is normally checked by default.

Tip: Note that the options **See and edit cost information**, **See and edit billing information** and **Enter expenses** only apply to the employee's personal timesheets. In effect, employees who are supervisors will automatically have access to all timesheet information for the employees they supervise, including cost, billing and expense information.

All of the other options in the **Security** section are selected as **No access** by default. An Employee-type user does not normally need supplementary access since employees systematically have access to the **Timesheets** and **Timer** tabs at all times.

In cases where you want employees to be able to access certain functions in the software, simply select the appropriate options.

Tip: Note that you can also give access rights to groups of employees. Employees systematically inherit all of the access rights from all of the groups to which they belong.

Tip: From the employee list, if you have all of the rights in the software, you can log in under another username by clicking on the small icon to the right of the employee's name. This is practical when you wish to test the access rights or supervision rights that you have given to an employee. Once signed in under the username, click on the link **Log out and log back in as..** at the top of the page to login in again as yourself. Note that you cannot log in under another username that is inactive or as a user who also has all of the rights in the application.

## Supervision rights

Contrary to access rights which give access to certain functions in the software (such as access to customer management), supervision rights allow an employee to supervise other employees. When an employee

supervises another employee, the supervisor has access to all of the supervised employee's timesheets, including the cost, billing and expense information. In addition, an employee who supervises another employee can approve or reject the timesheets submitted by the supervised employee.

By default, employees do not have any supervision rights over any other employees. Employees with no supervision rights can only view their own timesheets. If you would like an employee to supervise other employees and have access to other employee's timesheets in order to approve them, once the employee has been added, click on the **Change** button in the section **This employee is supervising** and check the employees or groups that this employee supervises.

Tip: If the option **This employee has all rights in the software** is selected in the employee's file, this employee also has supervision rights over everyone. Select the option **This employee only has the following rights** if you wish to specify the employees supervised by this employee or if you don't want this employee to supervise anyone.

Tip: Note that you can also give supervision rights to groups of employees. Employees systematically inherit all of the supervision rights from all of the groups to which they belong. Also note that an employee can supervise groups and groups can supervise employees or other groups. Care must therefore be taken when assigning supervision rights to groups.

## Timesheet entry

This section in the employee's file serves to specify the default behaviour for an employee when entering timesheets.

### Maximum time enterable

You can limit the number of hours that an employee can enter into timesheets, either per day or per week. For example, if you do not want an employee to be able to enter more than 40 hours per week in his or her timesheets, enter **40** in the field **Maximum time enterable** and then select **Week** from the dropdown list.

Tip: You can also specify the maximum amount of time that can be entered for each group. To do so, indicate in the employee's file to use the maximum time enterable indicated for the group by checking the box **Use base group settings**.

### Billing rate

If you would also like to track billing, you can specify the default billing rate for each employee which will be automatically entered when entering time transactions. You can specify a fixed billing rate for the employee or specify that the billing rate must vary according to the activity type entered in the time transaction.

Tip: Even if the employee does not have access to billing information when entering timesheets, a billing rate is nevertheless automatically entered.

Tip: Since you can also specify a billing rate for each group, you can specify in the employee's file that the billing rate specified for the group should be used by checking the box **Use base group settings**.

Tip: You can also specify different billing rates per customer in each customer file (under **Special billing rate** section) and even per project in each project file (also under **Special billing rate**). It is also possible to specify the billing rates according to multiple criteria via the option **Advanced calculation rules**.

### Hourly cost

If you would also like to track costs, you can specify the hourly cost for each employee. The hourly cost normally corresponds to the salary that you pay the employee. Contrary to the billing rate, you cannot specify here that the hourly cost varies according to the activity type. The reason is that, normally, an

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employee costs you the same amount, regardless of the type of activity completed. However, note that you can still specify different hourly costs according to multiple criteria via the option **Advanced calculation rules**.

## Time bank

This section of the employee's file serves to specify the default behaviour when updating employee time banks. Please see the section **Managing employee time banks** for more information on updating time banks. If you do not plan to manage your employee's time banks, simply use the default settings in this section.

### Time usually worked per week

Enter the number of hours normally worked by the employee per week. Based on this information, the time bank update option knows how many hours it must begin to put in the time bank instead of paying the employee.

Tip: Since you can also specify this information for each group, you can specify in the employee's file that the number of hours normally worked for the group should be used by checking the box **Use base group settings**.

### Calculation of overtime

When updating employee time banks, the overtime worked by an employee can be automatically multiplied by a factor. For example, if you want the time worked over 40 hours to be paid time and a half, select **per week** from the dropdown list, enter **40** in the field **After X hours** and then enter **1.5** in the field **Multiply by**.

Tip: Since you can also specify this information for each group, you can specify in the employee's file that the settings specified for the group should be used by checking the box **Use base group settings**.

### Negative time bank

You can indicate if you allow an employee to have a negative number of hours in his or her **Accumulated time** bank when updating employee time banks. This allows employees to receive full pay (meaning, employees will nevertheless be paid for the number of hours normally worked indicated in the above section **Time usually worked per week**) even if they have not worked enough hours in the week and there are not enough hours accumulated in their time bank to compensate for the missing hours.

If you do not allow negative time banks, in such a case, when updating time banks, the software will indicate that the employee must be paid only for the number of hours actually worked (instead of the number of hours normally worked per week) so that the time bank does not become negative.

Tip: Since you can also specify this information for each group, you can specify in the employee's file that the settings specified for the group should be used by checking the box **Use base group settings**.

## User defined fields

As in most of the software's other modules, it is possible to add additional fields that will allow you to store information that is specific to your company. Please see the section **User defined fields** later in the documentation for more information about adding additional fields.

## Member of

As indicated above, when you modify an employee's file, you must specify a base group for the employee. However, an employee may also be a member of other groups. To indicate that an employee is a member

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of additional groups, from the list of employees, click on the name of the employee to access the employee's file, click on **Change** in the section **Member of**, and then check the groups that you would like to add or remove.

### This employee supervises

As mentioned in the above section on **Supervision rights**, an employee can supervise other employees and/or groups. To indicate the employees or groups that an employee supervises, from the list of employees, click on the name of the employee to access the employee's file, click on **Change** in the section **This employee is supervising**, and then check the employees or groups that the employee supervises.

Please see the above section on **Supervision rights** for more information.

## Groups

Using this module, you can create new groups, add your employees to these different groups and manage access rights and supervision rights for the groups. For example, you can group together all of the employees from one department into a group and then assign certain rights to the group. You can also group together employees completing the same tasks and then assign the group to a specific project.

It can also be useful to manage security by group instead of by employee, especially if you have a large number of employees. When you create new employees, this avoids having to manually configure their rights every time. You must simply add the new employee to one of the groups that you have already created.

Tip: If you do not have many employees to manage (for example, fewer than 10), it can be easier to simply use the group **Everybody** (created by default), and which automatically includes all employees, instead of creating additional groups.

To manage groups, click on the **More** tab and then select the option **Employee groups**.

Simply click on the **New group** button to add a new group or click on the name of a group in the list to access its file. From the group's file, you have access to all of the relevant information that you can consult or modify.

When adding a group, you must enter at least one name and the name must be unique; there cannot be two groups with the same name. The other fields are optional.

Since the **Security**, **Timesheet entry** and **Time banks** sections are almost identical to those in the employee's file and since the supervision rights for a group also resemble those in the employee's file, please refer to the **Employees** section for more information on these sections.

### Member of

To indicate the employees who are members of a group, once the group has been created, access its file and then click on the **Change** button in the **Members** section. Then check the employees that you wish to add or remove.

Tip: You can also indicate the groups that the employee belongs to in the employee's file.

## Projects

To manage your projects, select the **Projects** tab. From this option, you will obtain the list of projects.

Simply click on the **New project** button to add a new project or click on the project description in the list to access its information.

When adding a project, you must enter a project description. The project description must be unique; there cannot be two projects with the same description. You can also enter a project code. This field is optional but, if you enter a code, the code must also be unique; there cannot be two projects with the same project code.

You must also select a customer for the project. In effect, a project must always be associated with a customer. Simply go to the **Customer** field and enter the name of your customer. If the customer already exists, the software will propose it to you and you can simply select the customer from the proposed list. If not, enter the full name of the customer and the software will automatically add the customer to the customer list (**Customer** tab) when you save the project. If necessary, you can also enter additional information about the customer, such as an address, by accessing the customer's file. Please see the **Customers** section for more information about customer management.

The **Category** field allows you to specify the project category. Categorizing projects is not mandatory. The project categories are simply another way to group projects. For example, from the list of projects, you can filter projects based on one or several categories so that only those categories appear on the screen. Another option would be to indicate that you would like a subtotal per project category when printing a report that displays the time worked per project, for example.

If you wish to use the project category function, access the **Categories | Projects** option from the **More** tab to manage the list.

The fields **Beginning date** and **Ending date** are optional and are available for information purposes only. These fields do not change the way the software behaves.

### Billing mode

In addition to time tracking, OroTimesheet allows you to track costs and billing. If you wish to track billing, you can indicate for each project if the billing mode is a fixed amount or if it is calculated on an hourly basis. This information is especially useful when generating invoices if you use OroTimesheet to bill your customers.

If you indicate that your project is being billed at a fixed amount, enter the amount in the field for this purpose. In such a case, when generating invoices, OroTimesheet will never bill more (total sum of invoices for the project) than the amount indicated in this field. In the case of fixed amount projects, you also have to indicate the number of invoices expected, as well as the percentage of fixed amount to bill on each invoice. Indeed, in the case of fixed amount projects, the number of invoices is usually determined beforehand with your customer.

If you indicate that the project is being billed on an hourly basis (Option **Per hour according to timesheets**), OroTimesheet will simply bill each billable hour entered.

Tip: If the project contains sub-projects and you indicate that the billing mode for the project is set at a fixed amount, you must enter the fixed amount for each sub-project. The total of the fixed amounts for each sub-project will automatically be transferred to the project. In such a case, the field designated for entering the fixed amount for the project will be disabled.

Tip: If you would rather generate an invoice for each sub-project, select option **One per sub-project**. In

such a case, you do not need to indicate the percentage to be invoiced for each invoice, as OroTimesheet will invoice the fixed amount entered for each sub-project.

Another benefit of selecting this option is that OroTimesheet will not invoice a sub-project as long as there is no time entered against this sub-project. For example, if your project has 3 sub-projects (Phase A, Phase B and Phase C) and you enter time on Phase B, OroTimesheet will invoice up to and including Phase B. If it takes 6 months before time is entered on Phase C, then the invoice for Phase C will be generated only at that time.

For more information about billing time, please see the **Invoices** section later in the documentation.

### Time bank

Each project must be assigned to a time bank. Please see the section **Managing employee time banks** for more information on updating time banks. If you do not plan to manage your employee's time banks, simply ignore this field in the project's file.

Tip: If the project contains sub-projects, you must indicate the time bank to be used for each sub-project. Sub-projects from the same project can be assigned to different time banks..

### Other information

You can make a project inactive at any time. In such a case, this project can no longer be selected in new timesheets that are created. You can also enter notes for each project. The notes are for information purposes only.

### Project managers

Each project must have a main manager. The main manager must be an employee. In effect, the main manager of a project cannot be a group. However, you can add additional managers to a project and these additional managers can be employees or groups.

When an employee (or group) is a project manager, he or she automatically inherits full access to the project's file, even if the employee (or group) normally doesn't have access to project's file. The primary purpose of project managers is to give employees full access to information about certain projects.

Project managers also have access to all of the timesheets entered for a project, even the timesheets entered by employees that they do not supervise. In such a case, the manager only has viewing access to the timesheets and does not have access to information about costs, billing and expenses in the timesheets (unless the manager supervises the employee who entered the timesheet).

To assign a main project manager to a project, edit the project and then select the employee from the **Main manager** dropdown list.

To assign additional managers to a project, access the project's file and then click on the **Change** button from the **Project Managers** section. Note that it is also possible to change the main manager of the project from this option.

### User defined fields

As in most of the software's other modules, it is possible to add additional fields that will allow you to store information that is specific to your company. Please see the section **User defined fields** later in the documentation for more information about adding additional fields.

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## Assigning employees to a project

In order for employees to have the right to enter time on a project in their timesheets, they must be assigned to the project beforehand. By default, when creating a project, the group **Everybody** is automatically assigned to the project. Since all employees are systematically part of the **Everybody** group, all employees are automatically assigned to each new project created.

To change the employees or groups assigned to a project, from the project list, click on the name of the project to access the employee's file, and then click the **Change** button from the section **Employees who can work on this project**. Then check the desired employees or groups.

## Assigning activity types to a project

As seen previously, when creating timesheets, in addition to entering the amount of hours worked, the employee must also indicate the project and the activity type completed. For detailed information on activity types, please see the section **Activity types** later in the documentation. The activity types are shared by all projects. By default, when creating a project, all activity types are automatically assigned to the project. However, you can indicate for some projects that only certain activity types can be selected for these projects when entering timesheets.

To change the activity types that can be selected for a project when entering timesheets, from the project list, click on the name of the project to access its file and then click the **Change** button from the section **Activity types selectable on this project**. Then check the desired activity types or activity type categories. In effect, activity types can be grouped by category to simplify management in cases where you have several different activity types.

## Special billing rates

As seen previously, in addition to performing time tracking, OroTimesheet also allows you to track costs and billing. When you wish to track billing, you can indicate a different billing rate for each project as specified by default for each employee or each activity type, if necessary.

To indicate special billing rates for a project, from the project list, click on the name of the project to access its file and then click on the **Change** button in the section **Special billing rate for this project**. Then check the employees or activity types that you would like to bill at a special rate. Lastly, indicate each of the desired billing rates.

Tip: It is also possible to enter special billing rates for each customer.

Tip: It is also possible to specify the billing rates according to multiple criteria via the option **Advanced calculation rules**.

## Budget

For each project, you can enter a budget in terms of hours, costs and the billable amount. If necessary, the budget can be distributed amongst employees, activity types, or expense types.

Tip: If the project contains sub-projects, you must enter the budget for each sub-project. The total budget for all sub-projects will be automatically transferred to the project.

To consult or modify a project's budget, from the project list, click on the name of the project to access its file. You will then see all of the information about the budget in the **Summary** section. The **Real** column corresponds to the total of all of the time transactions entered for the project. The **Budget** column displays the budget if you have entered one. The **Variation** and **%Budget** columns simply correspond to the



difference between the budget and the real time.

Tip: Click on the icon next to **Total billable** (open eye) to view the billing information for the project.

To modify the budget, click on the small icon (pencil) to the right of the **Budget** column header. Enter the number of hours and/or the amounts and then click on the **Save** button to save your changes. If timesheets have been entered for this project, you will see the difference between the budget and actual time in real-time.

Tip: If you do not track costs or billing, you can, for example, only enter the number of hours in the budget. In effect, you are not required to enter a budget in all of the fields.

Once the budget has been entered, you have the option of distributing it. In addition to entering the budget, it may be useful to distribute it amongst employees, for example. In such a case, you can see the difference between what was budgeted and what was actually done (entered in the timesheets) by each employee.

As indicated above, you can distribute your budget among employees, activity types, or even expense types. Note that only amounts in the Expenses (Costs) and Expenses (Billable) budgets can be distributed among expense types. For more information, please refer to the section on expenses later in the documentation.

For example, to distribute the number of hours budgeted per employee, click on the small icon (4 arrows) to the right of the number of hours in the **Budget** column and then select **Distribute by employee** in the menu. Enter the number of hours for each employee and then click the **Save** button to save your changes.

Tip: When distributing the budget, you can see the real time already entered in the timesheets.

Tip: When you have finished the distribution, the **Remaining to be distributed** field should be equal to 0. Normally, you must distribute the same number of hours (or same amount) that you have entered into the budget. Even if the software accepts that the total distributed is different from the budget entered, to simplify management, it is preferable for the number of hours (or amounts) to match up.

Tip: To obtain reports that display the difference between the budget distributed and the actual budget, run the reports called **Budget Distribution vs. Real...** in the **Customer and Project Reports** section in the dropdown reports list via the **Quick Reports/Exports** option.

## Sub-projects

Although optional, a project can have sub-projects, if necessary. To add sub-projects to a project, once the project has been added, access its file and then click on **New sub-project** button.

When adding a sub-project, you must enter a sub-project description. The sub-project description must be unique to the project; there cannot be two sub-projects with the same description in the same project. However, the same description can be used in another project without causing problems.

You can then enter a position. This position is the display position in relationship to the other sub-projects for the project in the list. If you leave the sub-project in the 0 position, the position will simply be the order in which the sub-projects were created.

If the billing mode for the master project is a fixed amount, enter the fixed amount for the sub-project in the field designated for that purpose. This amount will be added to the other fixed amounts for other sub-projects and the total amount will be transferred to the master project.

If you plan to manage your employees' time banks, you must select the appropriate time bank. Please see the **Billing mode** and **Time bank** sections in the **Employees** section above for more information on this topic.

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### **User defined fields**

As in most of the software's other modules, it is possible to add additional fields that allow you to store information that is specific to your company. Please see the section **User defined fields** later in the documentation for more information on how to add additional fields.

### **Assigning activity types to a sub-project**

As indicated in the **Projects** section, you can indicate that only certain activity types can be selected for a specific project when entering timesheets. You can also do the same for each sub-project in a project.

To change the activity types that can be selected for a sub-project, from the project list, click on the name of the project to access its file. Then, from the **Sub-projects** section, click on the description of the desired sub-project to access its file. Click on the **Change** button in the section **Activity types selectable on this sub-project** and then check the desired activity types or activity type categories.

Tip: The activity types and activity type categories in this option are only those that have been previously select in the section **Activity types selectable on this project** in the master project's file.

### **Budget**

As indicated in the Budget sub-section in the Projects section above, if the project contains sub-projects, you must enter the budget for each sub-project. The total budget for all sub-projects will be automatically transferred to the project.

Consult the Budget sub-section in the Projects section above for more information on budget management.

## Customers

As seen previously, a project must always be associated with a customer. It is not possible to create projects without a customer, and projects cannot be associated with multiple customers.

Tip: To manage internal projects, simply create a customer with your company name or use the customer **Customer for internal projects** which is automatically created by default. You can also rename this customer with another name, such as your company name.

The Customers module is therefore used to manage your customers for whom you are completing projects. To manage your customers, select the **Customers** tab. From this option, you will obtain the list of customers. Simply click on the **New customer** button to add a new customer or click on the name of a customer in the list to access its file.

When adding a customer, you must enter a customer name. The customer name must be unique; there cannot be two customers with the same name. You can also enter a code for the customer. This field is optional but, if you enter a code, the code must also be unique; there cannot be two customers with the same customer code.

You can then enter information about the customer, such as its address, the name of the primary contact, a telephone number and an email address. If you plan to use OroTimesheet to bill your customers, you must also enter the customer's payment terms which will automatically display on the invoices. Specify also the tax rate that you must charge to this customer.

Tip: To manage tax rates, access the option **Tax rates** available under the tab **More**.

The **Category** field allows you to specify the customer category. Categorizing customers is not mandatory. The customer categories are simply another way to group customers. For example, from the list of customers, you can filter customers based on one or several categories so that only those categories appear on the screen. Another option would be to indicate in a report that you would like to display a subtotal per customer category when printing a report that displays the time worked per customer, for example.

In short, if you wish to use the customer category function, access the **Categories | Customers** option from the **More** tab to manage the list.

The other fields, such as **Notes**, are optional and available for information purposes only. These fields do not change the way the software behaves.

### User defined fields

As in most of the software's other modules, it is possible to add additional fields that will allow you to store information that is specific to your company. Please see the section **User defined fields** later in the documentation for more information on how to add additional fields.

### Special billing rates

As seen previously, in addition to tracking time, OroTimesheet also allows you to track costs and billing. When you wish to track billing, you can indicate a different billing rate for each customer as specified by default for each employee or each activity type, if necessary.

To specify special billing rates for a customer, from the customer list, click on the name of the customer to access its file. Then click on the **Change** button in the section **Special billing rates for this customer**, check the employees or activity types for which you would like to specify a special rate, and then indicate the preferred billing rate for each.

Tip: It is also possible to enter special billing rates for each project. A special billing rate defined for an employee or an activity type for a specific project takes precedence over the rate defined for the customer.

Tip: It is also possible to specify billing rates according to multiple criteria via the option **Advanced calculation rules**.

### Summary

It is possible to view a summary of each customer's projects. In this section, the application indicates the total number of projects for the customer, versus the number of active projects. You can also view the number of invoices for the customer.

Tip: Click on one of the numbers for **Active projects**, **Inactive projects** or **Total projects** to automatically access the list of projects already filtered for each category.

Tip: Click on the number of invoices to automatically access the list of invoices filtered for the customer.

In this section, you can also view a summary of budget-related information for all of the customer's projects. The **Real** column corresponds to the total of all of the time transactions entered for any of the customer's projects. The **Budget** column displays the total budget for all of the customer's projects. The **Variation** and **%Budget** columns correspond to the difference between the budget and the actual time. This section provides an overview of all of the customer's projects.

To consult a summary of the customer, from the list of customers, click on the name to access its file. You

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will then see all of the customer's information in the **Summary** section.

Tip: Click on the icon next to **Total billable** (open eye) to also view the billing information.

## Activity types

As indicated previously, when entering time transactions, the employee must specify a project and activity type. An activity type may be, for example, **Management**, **Meeting**, or **Research**. If you do not wish to use an activity type, simply don't create any and you will only have to specify the same activity type by default. In effect, an activity type named **Default activity** is automatically created in the software.

To manage the list of your activity types, select the **Activity types** tab. From this option, you will obtain the list of activity types. Simply click on the **New activity type** button to add a new activity or click on the activity type description in the list to access its file.

The activity types that you create in this option are shared by all projects. However, as seen previously in the **Projects** section, it is possible to specify which activity types are selectable for each project (or sub-project). By default, when creating a new project, all activity types are automatically selectable for the project.

When adding an activity type, you must enter a description of the activity. This description must be unique; there cannot be two activity types with the same name.

The **Category** field allows you to specify the activity type category. Categorizing activity types is not mandatory. However, when assigning activity types to a project or sub-project, you can also assign activity type categories. This goes faster when you have several types of activities defined. The activity type categories are also a way to group types of activities. For example, from the list of activity types, you can filter the types of activities based on one or several categories so that only those categories appear on the screen. Another option would be to indicate in a report that you would like a subtotal per activity type category when printing a report that displays the time worked per activity type, for example.

If you wish to use the activity type category function, access the **Categories | Activity types** option from the **More** tab to manage the list.

If you plan to track billing in OroTimesheet and the rates that you bill to your customers vary according to the type of activity completed, you must indicate if the activity type is billable and specify its rate.

Tip: In the Employee's file (or Group's file), you can specify if the billing rate varies according to the employee or activity type. In addition, as seen previously, you can specify special rates for each project or customer. Lastly, it is also possible to specify the billing rates according to multiple criteria via the option **Advanced calculation rules**.

The **Status** field allows you to disable an activity type that you no longer wish to use. An inactive activity type is no longer selectable on the timesheets.

## User defined fields

As in most of the software's other modules, it is possible to add additional fields that will allow you to store information that is specific to your company. Please see the section **User defined fields** later in the documentation for more information on how to add additional fields.

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## Timesheets

Once the basic information has been entered into the software, you or your employees can enter your timesheets. Simple go to the **Timesheets** tab to enter your time.

The software always displays the timesheets for a full week at a time via the desktop view and a day at a time via the mobile view. Refer to the section **Desktop view vs Mobile view** below for more information about the desktop view and the mobile view. For now, let's talk about the desktop view.

By default, the software takes you to the current week. Use the arrows on each side of the date to switch from one week to another and click directly on the date to display a calendar. Then select the day of the timesheet you wish to consult.

On the left side (under the word **Timesheets**), select the radio button **Group per employee** to see the time transactions for specific employees. You can then select the employee from the dropdown list.

The dropdown list that contains the list of employees varies according to the user's supervision rights. By default, a user who does not have supervision rights over other employees will only see his or her name in the dropdown list (under the condition the employee is an Employee type user, otherwise the list will be empty). Users who have supervision rights over other employees will also see the names of the employees that he or she supervises in the list.

**Tip:** Note that only active employees who are Employee type user can be displayed in this dropdown list.

Using the dropdown list, you can easily move from one employee's timesheets to another's. This is especially useful if you must, for example, consult or approve the timesheets of the employees you supervise.

If you select the radio button **Group per project**, you can view or modify the time transactions by project instead of by employee. You will notice that the dropdown list of employees gives way to a search box that allows you to search for the project you wish to display. Start entering the project description or code for which you would like to enter time and then select the project from the list that the software displays.

Grouping transactions by project can be useful when you wish to enter the time worked for several employees, for example. In some cases, it can be quicker to enter the time worked per project rather than per employee. Another example where grouping transactions by project is useful is when you are a project manager and you wish to consult all of the transactions entered for a project.

For now, select back the radio button **Group per employee** then just below, be sure that the tab **Standard input mode** is selected since the documentation below explains how it works according to that mode.

Indeed, you can enter time in several ways in OroTimesheet (desktop view). The **Standard input mode** tab lets you enter time, a transaction at a time simply by clicking the **Add time** button below the desired day. This input method is the simplest to use.

The tab **Quick input mode** on the other hand allows you to enter several time transaction without having to click the **Add time** button each time. This mode is especially appreciated when you have to enter several time transactions such as if you need to enter time for other employees.

So, let's back to the **Standard input mode** tab. Click on the **Add time** button below the desired day to add time for that day.

To enter time, you must begin by specifying the project. Place your pointer in the box where it is written **Type something to search for a project** and then begin entering the project description or code for which you would like to enter time. The software will display a list of projects (according to the characters you have

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entered) and you will be able to select the project from the list. If the project contains sub-projects, you will be able to specify the sub-project using the dropdown list below the project. Next select the activity type, enter the number of hours worked just below then click the **Save** button at the bottom of the window to save your time transaction.

Tip: There are two ways to enter time: either in hours:minutes or in decimal format. For example, to enter 2h30min, you can either enter 2:30 or 2.5 or 2,5. When entering time in decimal format, the software automatically converts the decimal number (ex: 2.5) into hours:minutes, which would give 2:30h, in this case. The conversion occurs when you leave the cell (for example, when you click elsewhere). You can also chose to enter a whole number (ex: 2 to indicate 2:00h) or even a fraction without a whole number. For example, fifteen minutes may be entered in any of the following ways: .25 or ,25 or :15.

In addition to entering the time worked, it is also possible to enter additional information for each time transaction, if necessary. Indeed, you can enter or specify the work shift, the start time or end time, notes, costs and/or billing information (according to the employee's rights), as well as expenses, if necessary.

### Quick input mode

When you enter time via this mode (tab **Quick input mode**), you must begin by specifying the project. Place your cursor in the box where it is written **Type something to search for a project** and then begin entering the project description or code for which you would like to enter time. The software will display a list of projects (according to the characters you have entered) and you will be able to select the project from the list. If the project contains sub-projects, you will be able to specify the sub-project using the dropdown list on the right. Next select the activity type.

Then, click on the cell that corresponds to the day for which you would like to enter time and enter the number of hours worked.

Once the duration has been entered into the cell, the transaction is automatically saved when you leave the cell (for example, when you click elsewhere). When you are in a cell, if you press the **Enter** key (for example, instead of clicking elsewhere), the transaction is also automatically saved and the software positions you in the next cell. The **Tab** key also has the same function as the **Enter** key. Use the keys **Shift-Enter** or **Shift-Tab** to position yourself in the previous cell instead of the following cell. Lastly, use the **Up arrow** or **Down arrow** keys to position yourself in the cell on the line above or below.

Tip: Each cell corresponds to an entry in an employee's timesheet. Each entry is normally called a time transaction. A timesheet corresponds to all of the time transactions recorded for an employee in one week.

Tip: When you are positioned in a cell, click on the small green icon in the upper right corner of the cell to display (or hide) details about the transaction. The transaction details display in a new window that normally displays to the left of the cell in which you are positioned.

### Expenses

In addition to entering time, OroTimesheet allows your employees to enter expenses. In effect, if you also wish to track your project costs, it is a good idea to enter all related expenses. For each time transaction, you can enter as many expense transactions as you wish. An expense transaction is always associated with a time transaction.

To enter an expense in a time transaction, click the button **Add expense** from the **Expenses** section from the window that displays the transaction details.

When entering expenses, you must select an expense type and enter a quantity. The selectable expense types are maintained in the option **Types of expense** available under the **More** tab. You can enter a default unit cost or sales price for each expense type. You can also indicate if the expense type can be reimbursed

to the employee and/or billed to the customer. Lastly, you can make an expense type inactive if you no longer want the expense type to be selectable on the timesheets.

When entering an expense, once the expense type has been selected and the quantity has been entered, you must enter the cost of the expense (if it has not already been entered by default in the expense type). If the expense can be reimbursed to the employee, you must indicate the tax amount(s) that were paid for the expense. This allows you to obtain expense reports with the pre-tax and post-tax amounts in separate columns. You can even attach a copy of the receipt or the invoice for the expense that can be a photo or any other type of document.

**Tip:** An employee can take a picture of a receipt directly from his/her smartphone via the mobile view which is specifically adapted for smartphones. Just click on the paperclip icon to attach a file and then take a photo of the receipt. The software will automatically upload the photo to the expense.

Then, if the expense can be billed to the customer, you can also indicate the unit price if you have not entered a default price in the expense type. Lastly, it is also possible to enter comments to document the expense that has been made.

Click on the **Ok** button to validate the addition of the expense. Do not forget to click on the button **Save** or **Apply changes** (according if you are currently entering time via the **Standard input mode** or the **Quick input mode** tab) so that the expense entered is saved.

## User defined fields

As in most of the software's other modules, it is possible to add additional information in the time transactions which allows you to save information that is specific to your company. Please see the section **User defined fields** later in the documentation for more information on how to add additional fields.

## Timesheet approvals

Optionally, employees may submit their timesheets each week. This indicates to the supervisor that an employee has finished entering his or her timesheets for the week and that the supervisor can approve or refuse them.

**Tip:** A supervisor may approve or reject a timesheet even if the employee has not submitted it.

To submit their timesheets, employees must click on the **Submit for approval** button. The supervisor will instantly see in the **Dashboard** tab that the employee has submitted a timesheet and that the supervisor can approve or reject it. In the case of a refusal, the employee will automatically receive an email with the reason for the refusal if the supervisor checks the box **Notify employee** when refusing timesheet. The employee can make the requested changes and resubmit the timesheet.

**Tip:** From the mobile view, the employee must click on the menu button at the upper right corner and select the option **Submit for approval**.

Once the timesheet has been submitted or approved, it can no longer be modified. This is a way to freeze an employee's timesheet.

**Tip:** The Fiscal periods option also allows you to freeze timesheets. See the section on **Fiscal periods** later in the documentation for more information.

To access or refuse a timesheet, the supervisor must access the **Timesheets** tab and select the employee from the dropdown list. The supervisor will then be able to view the time entered by the employee for the selected week. To approve the timesheet, the supervisor must simply click on the **Approve this timesheet** button and respond **Yes** to the confirmation. To refuse the timesheet, the supervisor must click on the

**Reject this timesheet** button. A window will open that gives the supervisor the option to enter the reason for the refusal. The employee will automatically be notified by email.

Tip: A supervisor can also undo a timesheet approval or rejection by clicking on the **Undo (Approval/Reject)** button. An employee can also unsubmit a timesheet by clicking on the button **Unsubmit and make modifications**.

Tip: Click on the **Approval history** button to see the time and date on which the timesheet was submitted, approved, etc.

Tip: Any user who has supervision rights over an employee is automatically considered as the employee's supervisor. Therefore, the user automatically has the right to approve or reject the employee's timesheets.

Tip: At a glance, the supervisor can see the number of employees who have submitted their timesheets for each week and the number of approved and rejected timesheets, etc. in the **Dashboard** tab.

### Copying time transactions

To enter information into timesheets faster, it is possible to copy time transactions using the **Copy timesheet** button. After clicking on this button, a window opens and you can indicate which transactions you would like to copy.

If you were positioned on a time transaction when you clicked on the button, you can specify that you would like to copy this transaction only. If not, you can copy the transactions from a specific day or an entire week.

Then indicate the date on which you would like to copy the transactions and click on the **Ok** button to validate them.

### Desktop view vs. Mobile view

The Timesheets tab has two views: **Desktop view** and **Mobile view**. The desktop view is usually used when the user is accessing the application using a desktop computer. Indeed, since this type of computer is usually used with a high resolution screen, this view can display a lot of information at once. As indicated above, this view has three tabs called **Standard input mode**, **Quick input mode** and **Week summary**. The first two tabs are used to enter time while the last tab, as its name suggests, lets you consult in a single page all time transactions entered for an employee or a project for the current week (depending on whether **Group per employee** or **Group per project** is selected).

This last tab contains itself two sub-tabs named **Timesheet summary** and **Expenses summary** that display a summary of time or summary of expense transactions. In short, the tab **Week summary** is especially useful for supervisors who wish to approve their employees' timesheets and who must quickly see all of the transactions that were entered for a week without having to consult each transaction individually. This is also why the **Approve this timesheet** and **Reject this timesheet** buttons are also available under this tab.

The mobile view on the other hand is a simplified view adapted for small screen devices, such as smartphones and tablets. This view only displays one day at a time whereas the desktop view displays one week. The mobile view supports also slide events. For example, the mobile view allows you to easily change the day by sliding your finger across the screen.

Tip: The mobile view is actually what we call a WebApp. Unlike an App that you usually have to install on your smartphone or tablet before you can use it, a WebApp works directly via the internet browser of your smartphone without installing anything. It's actually like a website but adapted for the screen size of your phone. This allows you to enter your time from any type of smartphone such as iPhone, Android, Windows, BlackBerry, etc.



Tip: When a user signs in to the application, if the software detects that the user is using a smartphone, the software will automatically redirect the user to the mobile view.

To switch from one view to the other, from the desktop view, simply click on the **Switch to mobile view** link. From the mobile view, click on the menu button in the upper right corner of the screen and select the **Switch to desktop view** option.

## Timer

A timer is also included with OroTimesheet. This option allows you to track the time spent on different projects. Then, the time is automatically converted into a time transaction.

To access the timer, select the **Timer** tab.

Tip: From the mobile view, click on the menu button in the upper right corner and select the **Timer** option.

To start the timer for a task, click on the button **Start a new timer** (plus icon), specify the project (and sub-project, if required) and the activity type and then click the **Start** button. Your new timer will be displayed in the list and you will see the time start to calculate automatically.

Tip: You can access other options in the software or completely exit the software and the timer will not stop. In effect, this option is provided for that purpose. When you re-enter the application, you will see the timers in your list.

You can start timing multiple tasks at the same time. Each of the timers will be displayed in the list and will have their own counters. This allows you to pause the timer for a task while the timer for another tasks continues.

To pause a timer, click on the **Pause** button. The timer will immediately stop. Click on the **Start** button to restart the timer that you have paused. Click on the **Add notes** button (pencil icon) to add notes to your timer. These notes will be saved in the **Notes** section of your time transaction when you stop the timer and it is converted into a time transaction.

When you have finished your task, click on the **Stop** button to stop the timer for the task and convert the time calculated into a time transaction in your timesheet. In such cases, a window will appear to allow you to enter or modify notes which will be automatically saved in the **Notes** section of your time transaction. From this window, you also have the possibility to adjust the time calculated, for example, if you wish to round up. The software can also round up automatically by selecting certain options that are offered to you in this window. Lastly, click on the **Save** button to convert the timer into a time transaction.

Tip: Once converted into a time transaction, you can access the transaction (via the Timesheets tab) and make adjustments, if necessary.

To finish, you can also delete a timer. Simply check the box to the left of the timer you wish to delete and click the **Delete** button (trashcan icon).

## Invoices

As seen previously in the documentation, in addition to tracking time, OroTimesheet also allows you to track costs and/or billing for each of your projects. When you track billing, you can also know (for example, by using reports) how much you must bill to each of your customers.

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Based on this information, you can bill your customers (in most cases, by using your accounting software). In this case, your accounting software will print the invoice that you send to your customer. To avoid having to manually enter the information that is already available in OroTimesheet, you can, for example, print a report on the billable time and attach it to your invoice. This is a popular billing method that works well.

Another approach is to use OroTimesheet to generate the invoices that you send to your customers instead of using the invoices generated by your accounting software. In effect, since all of the information you need to generate your invoices is normally entered into OroTimesheet, this approach saves you time. In addition, since OroTimesheet also manages both fixed amount projects and hourly rate projects, OroTimesheet allows you to automatically generate your invoices with the correct amounts to be billed. This is another advantage of using OroTimesheet to generate your invoices.

It is clear that since OroTimesheet is not an accounting program, you must nevertheless enter each invoice into your accounting software to track your accounts receivable. However, since OroTimesheet has already performed all of the calculations, you only need to enter a total amount, or the basic information that will allow you to track your accounts receivable using your accounting software.

In conclusion, nothing prevents you from using OroTimesheet to generate invoices in order to obtain the correct amounts to be billed, and also print your invoices using your accounting software. We encourage you to use the method that works best for you.

**Tip:** An API (Application Programming Interface) is included with OroTimesheet that allows you to read and/or update your OroTimesheet data. The API can be used to communicate directly with your accounting software when possible (for example, to automatically create your invoices). Consult the documentation concerning the API in the **Help and Support** section under the **More** tab for more information on this topic.

To manage your invoices, select the **Invoices** tab. From this option, you will obtain the list of your invoices that have been previously generated. Simply click on the **Generate invoices** button to generate new invoices or click on the invoice number to access it.

**Tip:** Click on the **Print** button (printer icon) to print an invoice. To print several invoices at the same time, you can go to the option **Reports | Classic Reports** under the **More** tab.

**Tip:** Several invoice templates are already included in the application but we can also customize invoices if necessary. In effect, this is a service that we offer, for a fee. Please contact us for more information by going to the **Help and Support** section under the **More** tab.

## Generating invoices

When you wish to bill the time worked for your customers, you must generate invoices. This option automatically creates your invoices for the projects that your employees have worked on.

To generate invoices, click on the **Generate invoices** button. From this window, you can begin by indicating the date up to which you would like to invoice the unbilled time transactions by specifying the date in the **Timesheets (not invoiced) up to** field.

In effect, when generating invoices, the software only bills the transactions that have not yet been billed. Once the time transaction has been billed, it is marked as billed and the software will not bill it a second time. Only time transactions that are marked as billable (**Billable** box checked) can be billed. The same principle applies for expenses. Only expenses marked as billable can be billed.

**Tip:** To know which invoice belongs to which time transaction, from the **Timesheets** tab, click in the cell that corresponds to the time transaction you would like to verify, click on the small green icon in the upper right corner of the cell to display the transaction details, and then position your mouse above the invoice icon to see the invoice number.

Tip: You can also specify if you do not wish to invoice the timesheets that were entered before a certain date. This option is useful, for example, when you wish to begin generating invoices after you have begun using the software and you do not wish to invoice the previously entered timesheets.

You can then specify that you want the software generate invoices only for certain customers, certain projects or certain activity types if you do not wish to invoice all of the time transactions for the time being. Then specify the next invoice number that the software should generate. Normally, this field is automatically entered by the application. Then indicate if you would like the software to generate one invoice per customer or per project. In effect, if you work on more than one project at the same time for the same customer, you can indicate that you would like the software to bill one invoice per customer and the invoice will contain transactions from several different projects. Then, indicate the status that the invoice should have once it has been generated.

Tip: The description of the invoice statuses as well as the next invoice number can be changed in the **Application configuration** option under the **More** tab.

Lastly, click on the **Next** button to go to the next step.

At this point, the software will display the list of invoices that it will generate. For each invoice, you view information such as the invoice number, the customer name, the project(s), the billable time, the billable expenses, the billing mode (fixed amount or hourly) for each project, the fixed amount to invoice (for fixed amount projects), the number of invoices, amount and percentage already invoiced, total tax amounts and the final total.

You will see a check box to the left of each invoice. Uncheck the invoices that you do not wish to generate for the moment. These timesheets will retain an unbilled status and you will be able to generate an invoice for these timesheets later. If an invoice contains transactions for several different projects, you will also see check boxes to the left of each project. Uncheck the projects that you do not wish to generate for the moment.

Tip: When you uncheck the checkboxes to the left of the invoice or to the left of the project description, the invoice numbers and/or the total amounts for each invoice will change. You will not immediately see these changes on the screen at this step, but when the invoices are generated, the changes will be taken into account.

When you are ready, click on the **Generate invoices** button to generate the invoices that have been permanently selected. The software will display the number of invoices generated when it has finished processing them.

Tip: If you delete an invoice, all of the time transactions that were linked to that invoice will once again become uninvoiced and will be able to be invoiced again the next time you generate invoices. This option is very useful when, for example, you have forgotten something and you wish to regenerate the invoice.

Tip: In the case of a fixed amount project, once the entire fixed amount has been invoiced, the next invoices for this project will be generated with an amount of 0 to mark new time transactions entered on this project as invoiced.

Tip: In the case of a fixed amount project, if you selected option **One per sub-project** (from the project file drop-down list **Number of invoices expected**) OroTimesheet will not invoice a sub-project as long as there is no time entered against this sub-project. For example, if your project has 3 sub-projects (Phase A, Phase B and Phase C) and you enter time on Phase B, OroTimesheet will invoice up to and including Phase B. If it takes 6 months before time is entered on Phase C, then the invoice for Phase C will be generated only at that time. So it is possible that in the meantime, OroTimesheet generates invoices at 0 to mark new time transactions as invoiced if time is entered on a sub-project already invoiced.

## Adding an invoice manually

It can happen that you want to create an invoice for a customer without necessarily having timesheets attached to it. This option is used for this purpose. Click the **Add a manual invoice** button, enter the project to which the invoice will be attached, and click the **Ok** button. The application will create the invoice and then you can add lines to it.

## Modifying an invoice

Once the invoice has been created, you can consult or modify it by clicking on its number in the list of invoices. Most of the information on the invoice can be modified, except the project to which it is linked. In effect, each invoice is linked to a project and this project cannot be changed. If an invoice contains time transactions for several projects, the invoice is nevertheless linked to a project which will be, in this case, one of the projects contained in the time transactions linked to the invoice.

Some lines on the invoices may also not be changed because they are directly linked to time transactions. However, it is still possible to adjust other lines or even create new ones.

Tip: You can change the order of the lines on an invoice by clicking on the **Up arrow** or **Down arrow** buttons to the right of the line number. Another way to change the position of the lines is to simply click on the project description in the line and then, holding the mouse button down, move the line above or below another line.

## User defined fields

As in most of the software's other modules, it is possible to add additional fields that will allow you to store information that is specific to your company. Please see the section **User defined fields** later in the documentation for more information on how to add additional fields.

## Dashboard

This tab provides an overview of the information concerning your last timesheets and the number of hours that you currently have in your time banks.

In effect, from the **Status of your last timesheets** section, you can view the status of your timesheets for the past five weeks. For each week, you can view the status of the timesheet, which may be either **Not submitted**, **Submitted**, **Approved** or **Rejected**. When a timesheet is rejected, you can also see the reason for the rejection.

In the **Your time bank status** section, you can view the number of hours in your **Accumulated time**, **Vacations**, and **Sick** time banks, as well as the total number of hours for the three time banks.

The section **Timesheet status of employees you are supervising** only contains information if you are supervising at least one employee (employee of type Employee where the status is Active). In such cases, for each week, you can see the number of employees who have and have not submitted their timesheets, as well as the number of employees whose timesheets have been approved or rejected.

## Management of employee time banks

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With OroTimesheet, you have the option of accumulating the overtime hours worked by your employees. In effect, some companies accumulate overtime hours in a time bank for later use instead of immediately paying the overtime hours to their employees. In OroTimesheet, this time bank is called the **Accumulated time** bank.

OroTimesheet also allows you to manage two other time banks for vacations and sick leave. Each employee automatically has these three time banks (**Accumulated time**, **Vacations** and **Sick**) which are by default set to zero when creating the employee's file.

Tip: When the employee's file is created, you can also update the number of hours for each of the employee's time banks. Then, you should only have to adjust the time banks manually once per year to put new hours into the **Vacations** time bank and possibly the **Sick** time bank if your employees are also eligible for sick leave.

To manually adjust an employee's time bank, access the employee's file by clicking on the employee's name in the list of employees, and then click on the **Adjust manually / See history** button. On the next page, click on the button **Make a manual adjustment**.

The time bank calculation principle in OroTimesheet is relatively simple. Each employee must normally work a predetermined number of hours per week (**Time usually worked per week** field in the employee's file). If the employee works more hours during the week, the overtime hours are added to the **Accumulated time** bank. If the employee works fewer hours, in this case, the number of missing hours is subtracted from his or her time bank.

However, this is not done automatically. This operation must be conducted manually by an administrator, for example, each week or month, by using the option **Update employee time banks**. When an administrator executes this option, the program calculates the number of hours worked per week for each employee and updates their **Accumulated time** banks. The **Update employee time banks** option can also update the **Vacations** and **Sick** time banks if, for example, the employee was absent.

When updating time banks, in order for the program to know which of the hours entered in the timesheet should affect the **Accumulated time** bank and those which should affect the **Vacations** or **Sick** time banks, the program refers to the projects. In effect, as seen in the **Projects** section earlier in the documentation, each project (or sub-project) must be linked to a time bank. Normally, most projects must be linked to the **Accumulated time** bank while only specific projects should be assigned to **Vacations** and **Sick** time banks.

When entering timesheets, an employee should normally always enter time, even for days where he or she is absent. In the latter case, the employee must select, for example, the **Vacations / Leave** project to indicate to OroTimesheet that he or she was absent. When updating employee time banks, OroTimesheet will be able to automatically subtract the time from this day from the **Vacations / Leave** bank (depending on the case) rather than the **Accumulated time** bank.

Tip: By default, OroTimesheet already contains a project named **Vacations / Leave** which itself contains the sub-projects **Paid vacations / leave**, **Paid sick leave** and **Leave without pay**. These sub-projects are already correctly linked to the **Vacations** and/or **Sick** time banks. Your employees can therefore directly select these projects to enter vacation or sick leave in their timesheets.

## Updating employee time banks

To update employee time banks or to consult a history of updates made to the time banks, select the **Time banks management** option under the **More** tab. This option displays the list of all of the updates that have been made to the time banks to the present date.

Tip: Since each update is completed by employee group (the employee's base group which is used to know which group the employee belongs to), several updates may be displayed in the list for the same period but for different groups.

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To view the details about a specific update, click on the date in the list (in the **Period** column) for the desired update. The application will display the details about the calculation completed for each employee of the group for the period. To return to the list, click on the **Previous** button.

To perform the update of employee time banks, click on the **Update employee time banks** button at the top of the list. This function is completed in two steps.

In the first step, you must begin by specifying the employee groups whose time banks you wish to update. Simply uncheck the groups whose time banks you do not wish to update at the moment. In effect, if you want, you can complete a time bank update for one or a few groups at a time.

Next, indicate the period to be covered for each group. The period can span from one to several weeks. The period is always a multiple of weeks. For example, you cannot execute an update for one and a half weeks.

**Tip:** The period always begins the day of the week that corresponds to the first day of the week that you have specified in the **Application configuration** option. For example, if you have specified that your week begins on Sunday, the first day of the period selected must be Sunday and the last day must be Saturday. You should only have to make this adjustment once in the **Application configuration** option when you begin using the software and, normally, this must not be changed.

**Tip:** The first time you update the time bank for a particular group, you have the option of indicating to the software the date from which you wish to execute the update. However, for subsequent updates, the **Timesheet from** field will be disabled and will automatically contain the start date of the period for which the update is being executed because the application knows the exact period of the updates that were executed for each of the groups.

Then click on the **Next** button to go to the second step. At this stage, for each group selected, the software displays the number of hours worked for each employee in the **Regular time** column. The **Overtime** column can also contain a number of hours if you have indicated in the employee's file that you would like the application to calculate overtime after a certain number of hours per day or per week. See the section **Time bank | Calculation of overtime** in the **Employees** section earlier in the documentation for more information.

If the employee has entered time on projects that are linked to the **Vacations, Sick** or even **Ignore / Not payable time** banks, these hours will be displayed in the **Vacations, Sick** and **Ignored time** columns. The **Total period** column contains the total time of all preceding columns except the **Ignored time** column. The **Expected work time** column corresponds to the number of hours normally worked per week (**Time usually worked per week** field in the employee's file) multiplied by the number of weeks in the period for which you have executed the update. You will therefore find the difference between the **Total period** and **Expected work time** columns in the **Difference +/-** column.

The **Time to pay** column is automatically calculated by the application. If, in the employee's file, you have indicated that the employee's **Accumulated time** bank can be negative (**Negative time bank** field in the employee's file), the **Time to pay** column equals the **Expected work time** column. If not, this column may be less than the **Expected work time** column if the employee has worked fewer hours than expected and there are not enough hours in his or her time bank to compensate for the difference. Lastly, the columns **Accumulated time before/after, Vacations before/after** and **Sick before/after** indicate the current number of hours (before) in each time bank and the number of hours once the update has been completed (after).

Before permanently completing the update, for each employee, you have the option of manually modifying the **Time to pay** column if, for any reason, you would like to pay the employee for a number of hours that is different from the number of hours that was automatically calculated by the application. When you modify the number of hours written in this column, you will see that the value in the columns **Accumulated time before/after, Vacations before/after, and Sick before/after** is automatically adjusted.

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When you are ready, click on the **Update time banks** button to complete the update. Once the update has been completed, the employee time banks will automatically be updated with the values that were specified in the columns **Accumulated time before/after**, **Vacations before/after** and **Sick before/after**.

Tip: To send the number of hours paid for a specific period (**Time to pay** column during the time bank update or the **Time paid** when you consult the time bank update details) to your payroll department, use the report named **Time banks: Detail of time bank updates (perfect for payroll)** in the **Employee and Group Reports** section in the dropdown list that contains the list of report templates under the **Quick Reports/Exports** option.

## Undoing a time bank update

Once the time bank update has been completed, if you have certain adjustments to make for different employees, you can go directly to the employee's file and manually adjust his or her time bank.

However, if for any reason you have made an error during the time bank update, it is possible to completely undo the last time bank update for a particular group.

To undo an update, click on the **Delete** icon (trashcan) to the left of the update in question. When you consult the detail of an update, you can also click on the button **Undo this time bank update** at the top of the page, which has the same purpose. Note that you must undo the updates in chronological order, from the most recent to the oldest.

Tip: After updating the time banks for a specific group, if you then manually modify the time banks of specific employees in the group, these modifications will be lost if you undo the time bank update for the group.

# Reports

## Classic Reports

The **Classic Reports** option contains a bunch of reports that are ready to use. The main benefits about these reports is that they are easy to use and the presentation is neat. For example, it is easy to run one of these reports then send it in attachment by e-mail to a colleague or a client.

To access this option, select the option **Reports | Classic Reports** under the **More** tab. From there, just click on the report you want to execute.

When you run these reports, you can choose from one of the following output formats: PDF (Adobe Acrobat), XLS (Excel), XML, CSV, HTML, DOCX (MS Word), ODS (Open Document - Spreadsheet), ODT (Open Document - Word processing), TXT et RTF.

Tip: For a user to have the right to run a report, he or she must have received the right beforehand, for example, via the **Security** section of the employee's file in the **Classic Reports** subsection. Note that the group **Everybody** (which all employees are systematically members) has by default access to some reports of the **Personal Reports** section.

Tip: Marked reports (**Limited access**) can display only user data or data of employees that the user is supervising while a report that is not marked (**Limited access**) can display all data from all employees, regardless of whether the user is supervising these employees or not.

Tip: Unlike reports from option **Quick Reports/Exports**, these reports cannot be customized directly by the user. However, we can create personalized reports in this section for you according to your company's needs. This is a service that we offer, for a fee. Please contact us for more information.

## Quick Reports/Exports

OroTimesheet includes also a powerful reports generator that allows you to extract the exact information you need, in the format in which you need it. In effect, in addition to classic-type reports (such as, for example, a report with a fixed number of columns or a fixed sort order that usually you cannot change. See option **Classic Reports**), OroTimesheet gives you the option of personalizing quick reports/exports in a few mouse clicks and saves them for future use. By saving your personalized report, you avoid having to personalize your reports every time you wish to run them.

Tip: Once you have personalized and saved a report, you can share it with other users by simply checking the box **Share this report with other users**.

An example is worth a thousand words. To access this function, select the option **Reports | Quick Reports/Exports** under the **More** tab.

This function is divided into seven easy steps.

### **Step 1 - Select a report template**

OroTimesheet provides several report templates. In this step, you must select a report from the dropdown list that best corresponds to the type of information you wish to obtain. To help you, the dropdown list is divided into sections.

For example, if you wish to obtain the list of employees, you can select the report named **Employee list** in the **Employee and Group Reports** section. For a report that lists the time transactions entered in the timesheets, you must select a report from the **Timesheet reports** section. You may need several tries in the beginning to familiarize yourself with the templates. For the purposes of our example, select the report named **List of projects** in the **Customer and Project Reports** section.

Tip: We can create new personalized report/export templates according to your company's needs. In effect, this is a service that we offer, for a fee. Please contact us for more information.

### **Step 2 - Select the columns to be included in the report**

Once the report template has been selected, the columns available for the template are displayed in the **Available columns** section. The columns that will be displayed in your report are displayed in the **Selected columns** section. Double-click on the description of a column to add or remove it from the list of selected columns or select the description of a column and click on the left or right arrow to add or remove the columns from the list of selected columns. To the right of the **Selected columns** section, use the up and down arrows to determine the order of the columns in your report.

Lastly, for each of the columns selected, you can indicate in the section on the right (**Column options** section) if you would like to display a total for the column. Depending on the type of column, the choices available may be **None**, **Sum**, **Count** and **Average**.

For the purposes of our example, add only the following columns to the **Selected columns** section: **Customer: Name**, **Project**, **Description** and **Project: Real: Hours** (place the columns in this order) and then for the column **Project: Real: Hours**, select the **Sum** option in the **Column options** section.

### **Step 3 - Select the data sort order**

Once you have determined the list of columns that you would like to display in the report in step 2, you must now indicate the sort order for the data in your report. For example, if you would like the projects for the same customer to be displayed together, you should indicate that you would like the data to be sorted



according to the column **Customer: Name**, and then the column **Project: Description**. Your projects will therefore be displayed according to customer (alphabetical order according to the customer name) and then by alphabetical order according to the project description.

The columns that you have added to the **Selected columns** section in step 2 will automatically be found in the **Selected columns** section in step 3. To indicate the sort order, you must simply add the columns to the section **Sort by following columns** and then specify the order (which determines the sort order) using the up and down arrows. In this case, the column **Customer: Name** must be positioned first in the list, followed by the column **Project: Description**. Leave the column **Project: Real: Hours** in the **Selected columns** section since, in our example, we do not wish to sort the columns according to the number of project hours.

#### **Step 4 - Specify the criteria to filter the results**

Criteria allow you to filter the data to be displayed. By default, if you do not specify any criteria, all of the data in the report will be displayed. In some cases, this may be what you want, but in other cases you will receive too much data.

For example, if you ask for the list of time transactions and you have been using OroTimesheet for 10 years, you may have several thousand or even millions of records to display. To limit the amount of data to be displayed, you can, for example, add a criterion for the date of the time transaction so that only data for a certain period will be displayed.

For our example of a list of projects, we are only going to add a criterion for the customer. We can therefore specify if we would like the report to display all of the projects or the projects for only one customer in particular. Remove all of the columns in the **Selected criteria** column and then only add the **Customer** criterion in this section.

Then, select the **Customer** criterion in the **Selected criteria** section. In the section on the right, under **Specify the value for this criterion**, select **Only selected ones below**. Then, just below in the search box, start entering the first letters of the name of one of your customers. The application will display the list of customers that correspond to what you have entered. Select the customer from the list. Repeat the operation if you wish to obtain the list of projects for multiple customers.

Tip: For the purposes of our example, since we do not know which customer you selected, to be certain that at least one project displays in the report, select the **All** option from the section **Specify the value for this criterion**. At the end of this example, you can run the report again and select the option **Only selected ones below** to test the report while filtering the data for a specific customer.

#### **Step 5 - Additional report settings (Optional)**

As its name suggest, the **Skip detail** option allows you to display only the subtotals and the grand total of a report. For example, if you have a report that displays the list of time transactions and you have asked for a subtotal per employee, by checking this option, the time transactions will not be displayed. Only the subtotal for each employee will be displayed. This is practical when you do not need to the transaction details of a report, but you would like to know, for example, the total per employee.

#### **Step 6 - Run the report**

Since you have finished personalizing your report (you could also say you have "configured" your report), you can run it. Just before, you can determine the report's output format. If you would like to consult the information on-screen only, you can select the **.Html (Hyper Text Markup Language)** output format. However, if you wish to manipulate the data in the report or send the report via email, it more practical to select the **.xls (Excel)** or **.ods (Open Document Spreadsheet)** output format. Once you have selected the output format, click on the **Run** button to run your report. Once the report has been generated, click on the **Open** button to consult the report directly or **Download** to save the report to your computer.

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### **Step 7 - Save your report settings for future use (Optional)**

As indicated above, once you have personalized your report, you can save your settings so that you do not have to go through the procedure the next time you would like to run the same report. To save your report, simply click the **Save** button and then give a name to your new report. Once saved, the report will display in the dropdown list (in step 1) in the **My Templates** section at the very top of the list.

By default, you are the only person who can see the reports you have personalized. If you would like other users to be able to see them, simply check the box **Share this report with other users**.

Tip: For a user to have the right to run a report, he or she must have received the right beforehand in the **Security** section of the employee's file in the **Quick Reports/Exports** subsection.

In addition, in order for a user to be able to run a shared report, he or she must have the right to run the original report that was used to create the shared report. For example, if John created the report **Project list - John's version** using the **List of projects** report, and then John shared the report, in order for Jeanne to see John's report, she must have the right to run the **List of projects** report because John's report was originally created based on this report.

## Advanced calculation rules

### **Billing rate**

As seen previously, when you wish to track billing, you can indicate a default billing rate by employee or by activity type. You can simply indicate the desired behaviour (by employee or by activity type) as well as the rate for each employee from the employee or group's file. (Consult the **Employee** sections earlier in the documentation for more information). You can specify the default billing rate for each activity via each activity type's file.

We have seen that the default billing rate (by employee or by activity type) can be overridden for each customer (**Special rates** section) or for each project (also the **Special rates** section), which provides even more flexibility for managing billing rates. This ensures that the correct billing rate is automatically entered in the employee's timesheets according to the selected project or activity type.

Tip: As indicated earlier in the documentation, when entering timesheets, even if the employee does not have access to billing information, the billing rate is nevertheless entered automatically.

However, in some cases, you may need even more flexibility. For example, you might prefer to specify a billing rate for a customer according to the employee group instead of specifying a billing rate for each employee. Or, for example, you might want to specify a billing rate for each project category instead of for each project. You can so do in the section **Advanced calculation rules (Billing rate)**.

To access this option, under the **More** tab, select the **Advanced calculation rules** option and then **Billing rate**. In this option, you will obtain the list of rules that you have created.

The order of these billing rules in the list is important. In effect, when entering time transactions, the billing rules are verified in the order in which they are positioned in the list (**Sequence** column). The first billing rule encountered, and to which all of the criteria specified in the rule corresponds to the information entered in the time transaction, is automatically applied to the transaction in progress and the other billing rules are not verified. This is why it is important in this case to always position the most specific billing rules at the top of the list, followed by the less specific rules. Use the **Move up** and **Move down** arrows to position your billing rules in the list. You can also click on the description and hold down the left mouse button, then move the rule above or below another.

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To modify an existing billing rate, click on the sequence number in the list. To add a new rule, click on the **New calculation rule** button.

Begin by entering a description of the rule. Then select the action that must be taken on the billing rate when all of the rule's criteria match the information entered in the time transaction. You have the option of replacing the billing rate by another rate or modifying the billing rate using a calculation. Select the desired action in the **Action** field. Then enter a value in the **Value** field. This value is either the new rate if you choose to replace the existing billing rate or a value that will be used in your calculation in cases where you wish to modify the rate.

You must then specify the desired criteria so that the rule is applied. The criteria that can be used for each billing rule are: Work shift, customer category, customer, project category, project, activity type category, activity type, employee category, employee and group.

Once the criteria have been entered, click the **Save** button to save your changes.

**Tip:** Don't forget to adjust the position of the rule in the list since, as explained above, the order of the billing rules in the list is important.

## Hourly cost

Normally, an employee's hourly cost does not change no matter the project that the employee is working on or the type of activity being completed. However, in the case of subcontractors, for example, the hourly cost may vary. The **Advanced calculation rules | Hourly cost** option allows you to make this modification. In the employee's file (or group's file), you can specify a default hourly cost. However, if you would like the hourly cost to vary according to different criteria (for example, according to the project or customer), you can use the function **Advanced calculation rules | Hourly cost** to create special rules.

**Tip:** As indicated earlier in the documentation, when entering timesheets, even if the employee does not have access to cost information, the hourly cost is nevertheless entered automatically.

Since this option functions in exactly the same way as the advanced calculation rules (billing rate) above but instead of modifying the billing rate, these rules modify the hourly cost, please refer to the **Billing rate** section above for information about its operations.

To access this option, under the **More** tab, select the **Advanced calculation rules** option and then **Hourly cost**. In this option, you will obtain the list of rules that you have created.

## User defined fields

Additional fields called **User defined fields** can be added in most of the OroTimesheet modules. User defined fields are used to enter and modify information that is specific to your company. You can then use the information entered in the user defined fields to, for example, search for information in the software or print specific information in reports.

For example, if your company employs three representatives, you may want to indicate which representative within your company is responsible for each of your customers. You have the option of adding a new user defined field named **Representative** in the **Customers** module. This user defined field could be a dropdown list and contain the following choices: **John Wood**, **Jane Doe** and **Paul Lambert**. When entering your customers, you will now have a new **Representative** field and all you must do is select the representative who is responsible for the customer.

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You can add as many user defined fields as you wish in the following modules: Customers, Projects, Sub-projects, Activity types, Employees, Timesheets and Invoices.

The types of user defined fields that you can add are Character string, Integer number, Decimal number, Currency, Text, Date, Time, Date and time, Dropdown list, Radio buttons, Check, Duration and Hyperlink (URL).

A Character String user defined field can contain a maximum of 50 characters while a Text field can contain an unlimited number of lines of text. Decimal Number and Currency fields are almost identical, with the exception that Currency fields will also display the currency symbol that you have selected in the **Application configuration** option. These two field types can accept up to 4 decimals after the period.

The Dropdown List and Radio button fields function in the same manner. These two field types allow you to define a list of predetermined choices that the user must simply select when entering information in this type of field. The only difference is that Radio Button fields display all of the values on the screen whereas a Dropdown List field only displays the list of values when the user clicks on the dropdown list to display the choices. If you have multiple choices to offer the user (for example, more than 5 or 6) a dropdown list field is probably preferable since it takes up less room on the screen.

To finish, a Duration field allows you to enter a duration in an hour:minute form, whereas a Hyperlink (URL) field allows you to enter a URL, for example, a website address. When this type of field is displayed on the screen, the value that is entered (for example, a website address) becomes clickable. This is practical when you wish to quickly access a website.

User defined fields are always displayed in the **User defined fields** section, for example, in a customer's file or a project's file.

## How to add a user defined field in a module

To access this option, click on the **More** tab and then select the menu **Configuration | User defined fields**. Here you will find a list of the user defined fields that you have defined.

Simply click on the **New user defined field** button to add a new field or click on the description of the user defined field in the list to modify it.

When you add a new user defined field, you must begin by selecting the module where you would like to add the new field, for example, the **Customers** module, if we refer to our previous example.

**Tip:** Once the user defined field was created, the user defined field module can no longer be modified. For example, if you make an error, you must first delete your user defined field and then create a new one, this time selecting the correct module.

Then enter the description for the user defined field. For example: **Representative** if we refer to our previous example.

Next select the type of user defined field. For the purposes of our example, select Dropdown List. (See the list above for the user defined field types available.)

**Tip:** Once the user defined field was created, the type of user defined field can no longer be modified. For example, if you make an error, you must first delete your user defined field and then create a new one, this time selecting the correct field type.

The field position allows you to enter the position in which this user defined field should be displayed on the screen. This is only important if you have at least two user defined fields in the same module. You can enter any integer value in this field. For example, a user defined field whose position is 1 will display before a user defined field whose position is 5.

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If you have selected the **Dropdown List** or **Radio Button** field type, the **List of Values** field will appear and you must determine the predefined list of values that your field will offer the user. For the purposes of this example, enter **John Wood** on the first line, **Jane Doe** on the second line and **Paul Lambert** on the third line. Each value must be entered on a different line.

Tip: Give it some thought and think about how to enter each value correctly since you should not change them once users have begun selecting the values in the application. If you do so, the former values that have already been selected in the application (such as in a customer's file) will not be automatically updated. However, you can change the order of values in the list under the condition that you do not change the spelling.

Next specify the default value that you would like to appear in your user defined field. This is only used when you create a new entry in the module in question, such as a new customer. For the purposes of our example, since it is a dropdown list, select the first entry, **John Wood**.

Skip the **Link to** option for the moment because we will see it in greater detail later. Check the box **Display in grid** if you want to display this user defined field in the grid on the screen. About the option **Print this user defined field on forms and reports**, for now, it will only be used when printing invoices (only the user defined fields that you have created in the **Invoices** module).

Now click on the **Save** button to create your new user defined field. Once added, this new field becomes available immediately in the module in which you created it. In our example, since we added the field in the **Customers** module, if you go to the **Customers** tab and you modify any existing customer, you will see a new **Representative** field with a **dropdown list** in the **User defined fields** section.

Since this field was used as an example, go back to the User defined fields option and then, from the list, click the Delete button (trashcan icon) to the left of the **Representative** field.

Tip: When you delete a user defined field, all of the information that was entered in the field (for example, in each customer's file) is deleted at the same time and it is not possible to recover it.

#### **Linking one user defined field to another:**

OroTimesheet offers you the possibility of linking one user defined field to another.

Let's take the example of the representatives described previously. Even if a representative is assigned to each of your customers, you may want to assign another representative to a specific project instead of the representative who is normally assigned to the customer. You can therefore add a new user defined field in the Projects module which contains the same list of representatives as the Customers module. This solution would work perfectly, but when you wish to add a new representative to your list, you must first modify the Representative user defined field in the Customers module as well as the Representatives user defined field in the Projects module. You must make the correction in both places.

The **Link to** option allows you to add a user defined field in a module that uses the settings for another user defined field in another module. This avoids having to define the same thing twice.

For example, with reference to the previous example (Representatives user defined field), when you create a second Representatives user defined field, this time for the Projects module, instead of entering the same list of values again (list of representatives), from the **Link to** dropdown list, you just have to indicate to the user defined field to link the Representatives user defined field in the Customers module. This option has two undeniable advantages:

First, only the list of representatives in the Representatives user defined field in the customer module must be maintained since the Representative field defined in the projects module will directly refer to the information in the Representatives user defined field in the **Customers** module.

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Second, with reference to this example, when adding a new project, by selecting a customer for the project, the customer's representative will be automatically selected in the project's Representative user defined field. Simply put, the representative that will be automatically selected in the project will be the representative that is selected in the customer's file.

To link one user defined field to another, a few conditions must be respected. First, a user defined field must be linked to a user defined field of the same type (ex: a dropdown list must be linked to another dropdown list field). Next, only the user defined fields for certain modules may be linked to the user defined fields in other modules. These include:

A user defined field in the **Projects** module can only be linked to a user defined field in the **Customers** module.

A user defined field in the **Sub-projects** module can only be linked to a user defined field in the **Projects** module.

A user defined field in the **Timesheets** module can only be linked to a user defined field in the **Activity types, Projects** and **Employees** modules.

A user defined field in the **Invoices** module can only be linked to a user defined field in the **Customers** module.

Lastly, user defined fields in the **Customers, Activity types** and **Employees** modules cannot be linked to any other user defined fields.

## Fiscal periods

Although optional, fiscal periods (often called accounting periods) can be entered in OroTimesheet via the **Fiscal periods** option. Fiscal periods mainly serve to limit access to timesheets. Each fiscal period has an **Open** or **Closed** status.

For example, if you have a fiscal period dating January 1, 2015 to January 31, 2015 and the fiscal period has a **Closed** status, all of the time transactions dated between January 1, 2015 and January 31, 2015 will not be able to be modified. This is an easy way to block timesheet modifications for a given period, regardless whether or not the timesheets have been approved by the supervisors.

A period can be reopened with a click of the mouse so that you can make modifications to the time transactions corresponding to the period.

Fiscal periods can also be used when printing reports grouped according to the same fiscal periods as your company. This can be very practical when your company's fiscal periods do not necessarily following the calendar months.

To access this option, click on the **More** tab and then select the **Fiscal periods** option. In this option, you will obtain the list of fiscal periods that you have created. Simply click on the **New fiscal period** button to add a new period or, in the list, click on the date of the period that you wish you modify.

When adding a new period, note that the beginning date field can only be modified when you add the first fiscal period in the software. When adding subsequent periods, this field is automatically entered (and cannot be modified) and is set to the ending date of the preceding period, plus 1 day.

When modifying a period, the **Beginning date** and **Ending date** fields can never be modified. The only

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exception is when you modify the last fiscal period entered. In this case, the **Ending date** can be modified.

Tip: In order to be able to modify the dates of the periods preceding the last period entered you must first delete the periods in chronological order, from the most recent to the oldest, and then recreate them.

When adding a period, you must enter a description. This description must be unique; there cannot be two fiscal periods with the same name. To make reading easier, we recommend beginning the description with the fiscal year followed by the month. For example: **2015 – January** or **2015 – Period 1**.

You must also enter the year and the period number in the fields **Fiscal year** and **Fiscal period**. These are also mandatory fields and there cannot be two periods with the same year and fiscal period.

To finish, specify if the period is open or closed in the **Status** field. As indicated above, when setting a period's status to **Closed**, all of the time transactions dated within that time period automatically become unmodifiable. You can reopen or close periods again as needed at any time.

Tip: To delete a period, click on the **Delete** button (trashcan icon) to the left of the period. As indicated above, the periods must be deleted in chronological order, from the most recent to the oldest.

## Sync with other software

### QuickBooks

You can synchronize data with the QuickBooks application (the online version of QuickBooks) by selecting the **Sync with | QuickBooks** menu available from the **More** tab.

From this option, begin by clicking the **Connect to QuickBooks** button to be redirected to the QuickBooks website and connect to it. Once connected to QuickBooks, select the company you want to connect to (if you have more than one) and click on the **Connect** button to allow OroTimesheet to access your QuickBooks data. You will then be redirected to the OroTimesheet website in the data synchronization page with QuickBooks.

This page allows you to synchronize the list of your customers and/or projects (and sub-projects) between OroTimesheet and QuickBooks. Select options you want then click the **Sync now** button to synchronize data. You can access back this option as needed each time you want to synchronize your data again.

Click the **Disconnect** button to log out of your QuickBooks account.

## Tips and practical advice

### Searching

In most of the software's options (Employees, Projects, Customers, etc.), you can search and quickly locate a specific record. For example, select the **Projects** tab to display the list of projects. You will notice that there is a search box in the upper left corner. This search box has two search modes: Quick Search and Detailed Search.

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### **Quick Search mode**

When you enter text in the search box, the quick search mode is automatically activated. If the text that you have entered corresponds to a description or valid project code, the software will display the project(s) found in a list under the search box and you will be able to select one of the projects proposed by the software to take you directly to the project. To ensure that the search goes quickly, the search is only conducted in a limited number of fields, in this case, the project description and code fields.

### **Detailed Search mode**

Contrary to the quick search, the detailed search searches all of the fields in the project's file (if we continue with the example of a project search). To activate the detailed search, enter one or more keywords and click the **Search** button. All of the projects containing all of the keywords entered will automatically be displayed in a list.

You will notice that this search goes rather quickly despite the fact that the software must search all of the fields in the project's file. This is made possible by a special search algorithm (exclusive to OroLogic). In simple terms, every time information is entered into the software, all of the words entered by the user are automatically indexed in a precise manner in a database. Then, when a user conducts a search, the software uses the special algorithm to quickly and precisely locate in which records/files the words have already been entered and then display these files (projects, in this case) to the user.

For example, in the projects list, if you search for the words **urban park development**, all of the projects containing these three words are displayed on-screen. A project that only contains two of the three words entered will not be displayed.

Note that only words with 3 or more characters are indexed. Words with less than 3 characters are ignored. In addition, words that contain special character, such as **!@#\$\$%^&\*()+ or =** etc. are divided into several words. For example, if you have entered a number such as **ABCD-1234**, in a project's file, the dash (-) character will be ignored and two separate words will be indexed in the database (**ABCD** and **1234**). If you search for ABCD-1234, this is equivalent to searching for the two words, ABCD and 1234, separated by a space.

For performance purposes, the search is always conducted from the beginning of the word which means that, if you search for the word **devel**, projects containing the words **development**, **develop** and **developments** will display in the search results. However, a project that would contain the word **redevelopment** will not appear because the word does not begin by **devel**.

To finish, note that the search is not case sensitive which means that, if you search for the word **devel**, projects containing the words **development**, **DEVELOP** and **DeVeLoPmEnTs** will display in the search results.

The same principle applies for most accented characters. If you search for the french word **élève**, projects that contain the words **élève**, **eleve** or even **èlève** will be displayed. For example, in the case of the letter "e", the characters é,è,ê, etc. are all considered as unaccented letters.

Since OroTimesheet is compatible with Unicode, the search will function just as well with the text entered using any alphabet, whether the Latin alphabet (English, French Spanish, etc.), or the Greek or Chinese alphabets, for example.

### **Filter**

Filter: In most of the software's options (Employees, Projects, Customers, etc.), you can filter the data displayed on screen. Simply click on the **Filter** box and select the filter to be applied. You can apply several filters simultaneously. For example, in the **Projects** option, you can filter the list of projects in order to display only active projects belonging to a certain category.

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## Sort order

OroTimesheet allows you to change the data sort order on screen at any time in most of the software's modules. For example, if you go to the **Projects** tab, you will notice that the projects are displayed alphabetically by default, according to the project description. If you would like to list the projects by their project codes, click on the **Code** header and the list will automatically display the projects according to their codes (from smallest to largest). Click on the **Code** header again and the list will display by code but, this time, from the largest to the smallest. It is therefore possible to sort data in most of the columns and in most of the modules.

## Terminology

Some of the terms used in the software can be changed to adapt to your organization's terminology. For example, if you do not like the term "sub-project", you can change it to the term "phase" or any other term of your choice. When you change a term, the term is immediately changed everywhere in the software and in reports. You can change the terms at any time. The terms that you can change are: **Employee**, **Customer**, **Project**, **Sub-project** and **Activity type**.

To access this option, click on the **More** tab, select the menu **Configuration | Terminology** and then select the language of your choice. In effect, since OroTimesheet is multilingual, you can adapt the terms in the different languages in which you plan to use OroTimesheet.

## Subscribing to OroTimesheet

It is possible to use OroTimesheet for free for a 45-day trial period. There are no restrictions in the software during the trial period. You can therefore use OroTimesheet for as many employees as you wish at no charge.

To continue using OroTimesheet, after the 45-day trial period, you must subscribe for the desired number of employees.

As indicated in the **Employees** section earlier in the documentation, you do not need a subscription for "Software user only" user types. Access to the application for this type of user is free. You must only have a subscription for Employee-type users (employees who must have timesheets). Consult the **Employees** section earlier in the documentation for more information.

**Tip:** When an employee leaves your organization, simply set the employee's status to Inactive. This employee will no longer be able to access the software. In addition, you can keep a complete history (timesheets, etc.) of this employee in the software. Since inactive employees are not taken into consideration for subscriptions, you can add a new employee to replace the inactive employee without changing the number of employees in your subscription.

When you have a subscription to OroTimesheet, you must subscribe for a period of 3, 6, 9 or 12 months. Thirty days before the end of the subscription, when you log in to the application, a message will appear notifying you that you must renew your subscription for a new term. This gives you a sufficient amount of time to complete your renewal. Once the subscription has been renewed, the new term will be added to the current term. As you may have noticed, there are no automatic renewals. You decide when you are ready to renew your subscription.

To subscribe to OroTimesheet, to renew your subscription or to adjust the number of employees in your subscription, simply go to the option **Subscription management** under the **More** tab and click on the **Subscribe to OroTimesheet** button or the button **Renew my subscription or change options** (depending on the case) and then simply follow the directions on the screen.

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Tip: You do not need to wait until the end of your trial period to subscribe to OroTimesheet. When you subscribe, the term is added to your trial period. You will not, therefore, lose any days of your trial period.

Tip: At any time during your subscription term, you can add or remove employees from your subscription. In the case of adding employees to your subscription, you must only pay pro rata for the new employees for the rest of the term. If you remove employees from your subscription, the application does not make any reimbursements but it will automatically extend the term period for the other employees, always pro rata according to the number of employees/remaining period.

## Help and Support

We are happy to provide you with free support for OroTimesheet. There are no additional technical support contract to pay when subscribing to OroTimesheet.

### Request for information or technical support

If you have any questions about the application, we are happy to provide you with support services as needed.

Please begin by consulting the **Frequently Asked Questions** section from the **Help and Support** option under the **More** tab for answers to the most commonly asked questions about OroTimesheet. If you cannot find a response to your question in this section, contact us by filling out the support request form also available in the **Help and Support** option under the **More** tab. We will respond to your message as soon as possible. We are happy to provide assistance in both English and French.

### 24/7 Surveillance

Please note that our systems are monitored 24 hours a day, 7 days a week. Surveillance is conducted using our own tools and simultaneously by a third party. When one of our systems is temporarily unavailable, our technicians are immediately notified. and you do not need to fill out any requests to notify us. In such cases, you will only have to wait a few minutes (the amount of time it takes for our technicians to intervene) and then try again.

You can access the address <http://status.orotimesheet.com> from your internet browser to see the status of our systems at any time, as well as the history.

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# Copyright

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