

# Time Sheet Overview

Id	Type of Work	Date	Qty./Time	Description	User	Context	State	Total	Currency	Chargeable
	Project work	10/19/2012	2:00	Consulting job	root	Favourite C	Pending	0.00	EUR	<input checked="" type="checkbox"/>
	Training	10/18/2012	5:00	Preparation	root	Favourite C	Pending	0.00	EUR	<input type="checkbox"/>
	Meeting	10/16/2012	2:30	Client meeting	root	Favourite C	Pending	0.00	EUR	<input type="checkbox"/>

The Time Sheet application allows users to:

- add new ad-hoc Time Sheet records
- get overview about existing records
- confirm Time Sheet records

The above screenshot illustrates several features of Time Sheet application:

1. Select period, for which you want to review your Time Sheets
2. Select whether you want to create Time Sheet or Expense record(s)
3. Confirm your Time Sheet records by sending them For Approval
4. Verify your filter settings
5. Adjust the Time Sheet view settings (columns) & use mass-change features

# Time Sheet Online Reporting

Users & managers that want to get quick overview about the usage of their time may use quick reporting tool directly integrated into Time Sheet application.

10/14/2012 - 10/20/2012	Id	Type of	Date	Qty./Time	Description	User	Context	State	Total	Currency	Chargeable
Timesheet/Expense: any		Project w	10/19/20	2:00	Consulting job	root	Favourit	Pending	200.00	USD	<input checked="" type="checkbox"/>
Users: root		Training	10/18/20	5:00	Preparation	root	Favourit	Pending	400.00	EUR	<input type="checkbox"/>
Approval Status: any		Meeting	10/16/20	2:30	Client meeting	root	Favourit	Pending	500.00	EUR	<input type="checkbox"/>
Chargeability: any											
Context filter:											
Type of work filter: any											
Subtotals: by Types of Work											
<input type="checkbox"/>	by Days										
<input type="checkbox"/>	by States										
<input checked="" type="checkbox"/>	by Types of Work										
<input type="checkbox"/>	by Users										
<input type="checkbox"/>	by Clients										
<input type="checkbox"/>	by Projects										
<input type="checkbox"/>	by Activities										
<input type="checkbox"/>	by Master Clients										
<input type="checkbox"/>	by Master Projects										
<input type="checkbox"/>	by invoiced VAT										
<input type="checkbox"/>	by Wage Type										
<input type="checkbox"/>	by Wage Standard Type										
Type of Work				Total time		Cost Total			Total		Currency
Meeting				2:30		75.00			500.00		EUR
Training				5:00		150.00			400.00		EUR
Project work				2:00		50.00			200.00		USD

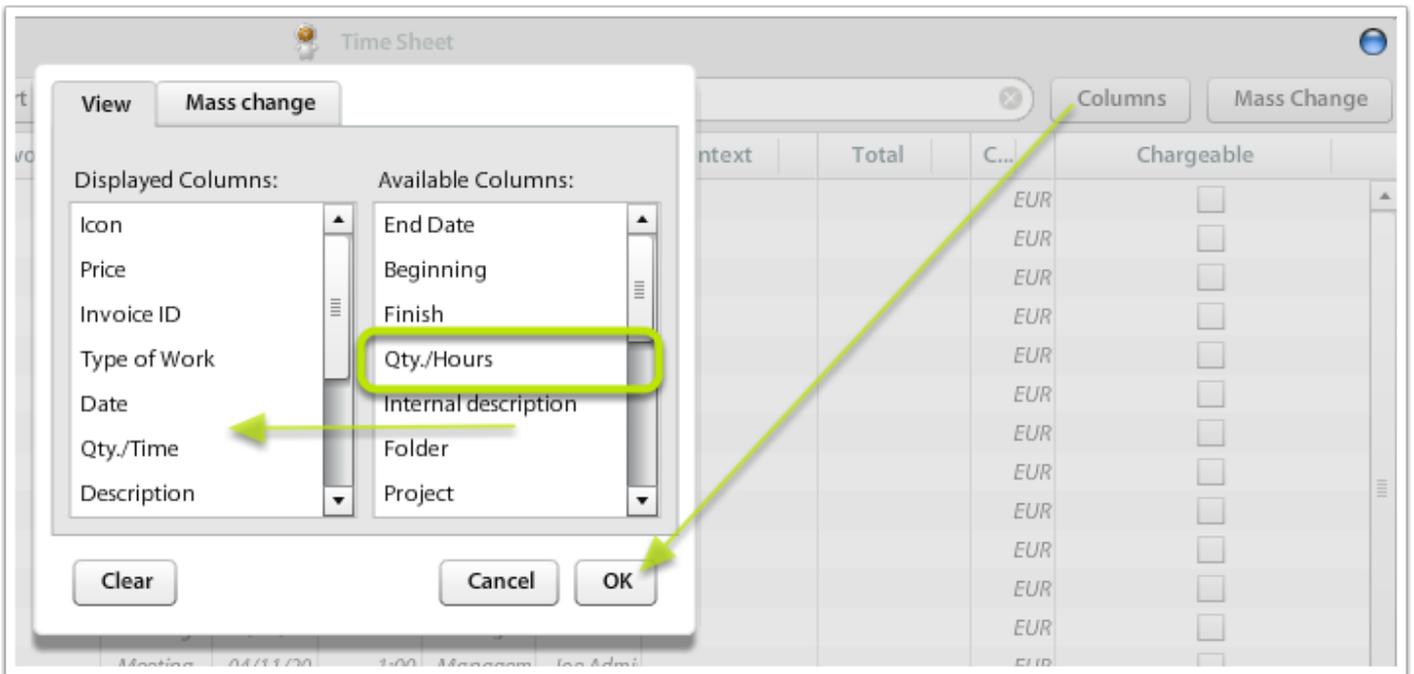
Open the Subtotals section of left accordeon. You may select various criteria upon which you can group Time Sheet record. You can even select one grouped record (in screenshot marked yellow) & above records will get filtered (it's function called record drill-down).

This online view is particularly helpful if you want to approve Time Sheet records. You may group them by projects or users to approve the time consumed.

## Adjust Displayed Columns

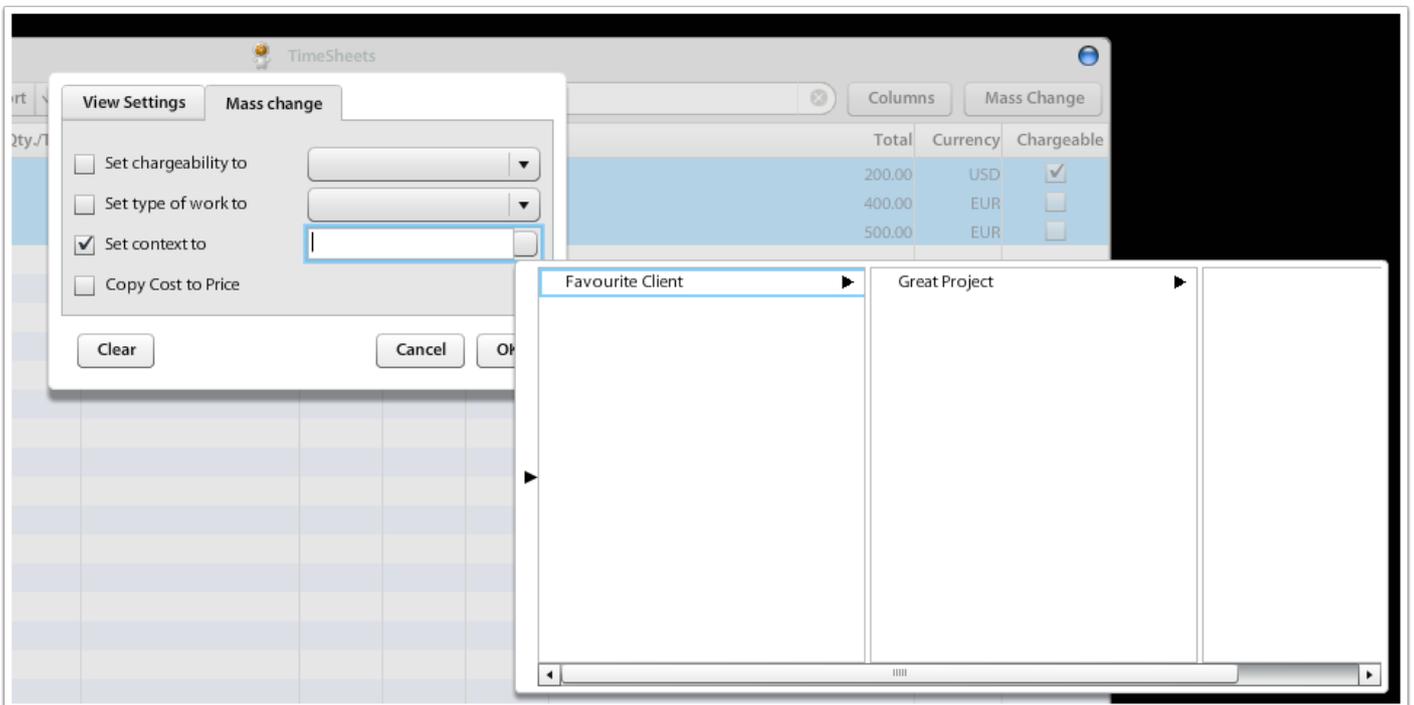
You may want to see some additional information about Time Sheet records, such as (for instance) Qty calculated in minutes (that is useful for exporting & further calculations in Excel) or you may want to add Tracking Categories visibility to see the Cost Centres, etc.

See the attached screenshot below to see how you can add more columns to Time Sheet records:



# Time Sheet Adjustments

You can change multiple records by using Mass-change tool.



You can change multiple records's attributes:

- Set chargeability to yes/no
- Change Type of Work
- Change context (project) of Time Sheet record

- Copy Cost to Price (useful when Expenses are re-charged to clients 1:1)

# Time Sheet Approvals

Managers or authorized users are able to approve User's Time Sheets. After approving Time Sheets, the Time Sheet records may be sent to Billing for further invoicing.

To approve Time Sheets, you may filter for users (or show all users), set grouping criteria in Subtotals section and filter only for records that are For Approval (in Approval Status accordion):

The screenshot shows the TimeSheets application interface. At the top, there are navigation buttons: Time Sheet (+), Copy, Delete, Edit, and Export (v). A search bar and buttons for Columns and Mass Change are also visible. The main table has columns: Id, Type of, Date, Qty./Time, Description, User, Context, State, Total, Currency, and Chargeable. Three records are listed and highlighted in blue:

Id	Type of	Date	Qty./Time	Description	User	Context	State	Total	Currency	Chargeable
10/14/2012 - 10/20/2012	Project v	10/19/20	2:00	Consulting job	root	Favourit	For Appr	200.00	USD	<input checked="" type="checkbox"/>
	Training	10/18/20	5:00	Preparation	root	Favourit	For Appr	400.00	EUR	<input type="checkbox"/>
	Meetind	10/16/20	2:30	Client meeting	root	Favourit	For Appr	500.00	EUR	<input type="checkbox"/>

On the left side, there is an 'Approval Status: For Approval' filter dropdown menu with options: any, Pending, For Approval (highlighted), Approved, and Invoiced. Below the dropdown are buttons for 'Approve Selected' and 'Reject Selected'. At the bottom of the interface, there are buttons for 'Evaluate Selected', 'Re-evaluate Selected', and 'Approve Selected' (checked), along with a summary: 'Total records: 3 Total time: 9:30 Total quantity: 0 Total price: 1 100,00'.

After selecting records for approval, you may click Approve Selected / (or All) records.

After Time Sheet records are approved, they may be sent to Billing for invoicing.

# Time Sheet Invoicing

After Time Sheet records are approved, they can be **sent to Billing** for invoicing process.

The screenshot shows the TimeSheets application window. At the top, there are menu items: Time Sheet, Copy, Delete, Edit, and Export. A search bar and buttons for Columns and Mass Change are also visible. The main area contains a table with the following data:

10/14/2012 - 10/20/2012	Id	Type of Wo	Date	Qty./Time	Description	User	Context	State	Total	Currency	Chargeable
Timesheet/Expense: any		Project wor	10/19/2012	2:00	Consulting job	root	Favourite C	Approved	200.00	USD	<input checked="" type="checkbox"/>
Users: root		Project wor	10/19/2012	2:00	Consulting job	root	Favourite C	Approved	200.00	USD	<input checked="" type="checkbox"/>
Approval Status: Approved		Training	10/18/2012	5:00	Preparation	root	Favourite C	Approved	400.00	USD	<input type="checkbox"/>
any		Meeting	10/16/2012	2:30	Client meeting	root	Favourite C	Approved	500.00	USD	<input type="checkbox"/>
Pending											
For Approval											
Approved											
Invoiced											
Invoice All											
Reject All											
Chargeability: any											
Context filter:											
Type of work filter: any											
Subtotals											

At the bottom of the window, there are buttons for Evaluate All, Re-evaluate All, Reject All, and Invoice All. A status bar at the bottom right shows: Total records: 4 Total time: 11:30 Total quantity: 0 Total price: 1 300,00.

## Sending Time Sheets to Billing

When invoicing Time Sheet, Time Sheet records are merged into Billing items. Each Billing Item will be created with associated Product based on Item Settings. In Item Settings (only in MS Win admin interface) each Type of Work may be associated with different Product.

During Time Sheet invoicing process, it is possible to adjust Billing details, add some fixed fees & adjust how many hours were covered by the fixed fee amount. In Billing, you can also add some other Products / Services to be charged, which allows it to you to add Time & other products & services into one invoice.

## Approving Billing

The screenshot shows the 'atollon' software interface. At the top, there's a 'Dashboard' and 'New...' button. The main area is titled 'Billing' and contains a table with columns: Folder, Item, Unit, Qua, VAT, Tot, Billi, Billi, Fold, Proj, Esti, Invo, Pro, and Description. Below this, a 'TimeSheets' window is open, showing a calendar for October 2012 and a table of time sheet entries. A yellow arrow points to the 'Approve Selected' button in the TimeSheets window.

Folder	Item	Unit	Qua	VAT	Tota	Billi	Billi	Fold	Proj	Esti	Invo	Pro	Description
Any		0.00 USD	7.5	20%	0.00 USD	For appr	10/31/201	Favourite	Great Pro				2012-10-14 - 2012-10-20
Favourite Client		100.00 US	4	20%	400.00 US	For appr	10/31/201	Favourite	Great Pro				2012-10-14 - 2012-10-20

Time Sheet	Copy	Delete	Edit	Export	Columns	Mass Change					
10/01/2012 - 10/31/2012											
ICo	Type of W	Date	Qty./Time	Description	User	Context	State	Price	Total	Currency	Chargeable
Project wc		10/19/201	2:00	Consulting job	root	Favourite	Invoiced	100.00	200.00	USD	<input checked="" type="checkbox"/>
Project wc		10/19/201	2:00	Consulting job	root	Favourite	Invoiced	100.00	200.00	USD	<input checked="" type="checkbox"/>
Training		10/18/201	5:00	Preparation	root	Favourite	Invoiced	80.00	400.00	USD	<input type="checkbox"/>
Meeting		10/16/201	2:30	Client meeting	root	Favourite	Invoiced	200.00	500.00	USD	<input type="checkbox"/>

## Create Invoice from Billing Items

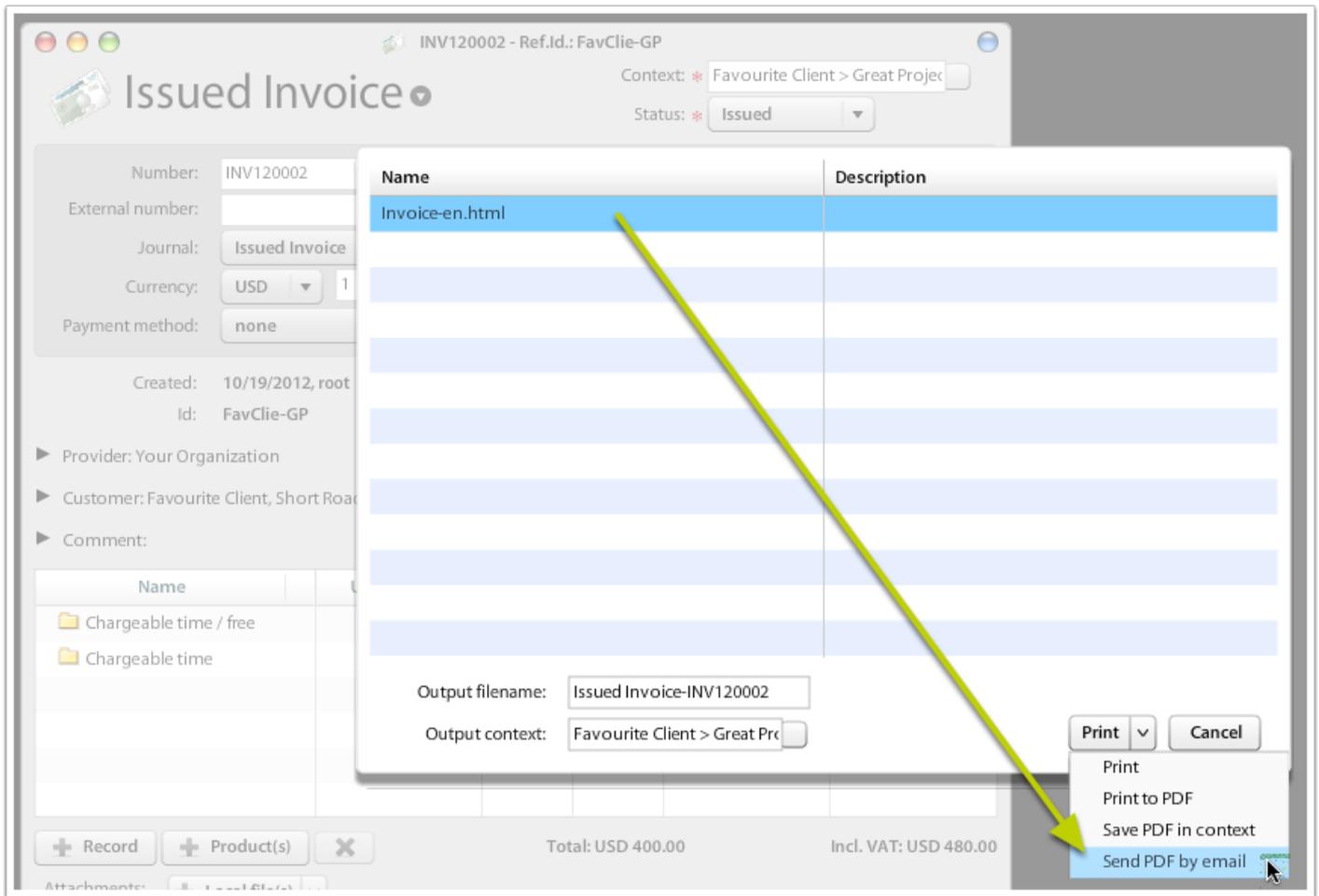
After Billing Items are approved in Billing application, they can be invoiced.

## Print & send invoice

In invoice's context menu, select **Print**.

The screenshot shows the 'Issued Invoice' application window. The title bar reads 'Issued Invoice - Ref.Id.: FavClie-GP'. A context menu is open over the 'Issued Invoice' title, with the 'Print' option highlighted. The window contains various fields for invoice details, including Number, External number, Journal, Currency, Payment method, Context, Status, Issued date, Due date, Taxation date, and To be paid.

You have option to directly create PDF & attach it to your new e-mail. Before sending the e-mail you may select e-mail template & send the e-mail.



# Time Sheet Valuation

The Time Sheet rates for wage (internal rate) or price (external rate) may be entered by system automatically, if you fulfill several conditions:

1. You set-up valid **Work Contract** for the user
2. In case you have customized price/rates for the **Folder** (Client), you select either standard or individual Work Price List at Folder/Client Billing Settings.
3. In case you have customized price/rates for the **Project**, you select either standard or individual Work Price List at Project Billing Settings.

The valuation is done by the system automatically after user confirms the Time Sheet records. Manually entered Time Sheet records should be confirmed automatically by system (work-in-progress), automatically entered Time Sheet records should be confirmed by either user or manager.

## The Time Sheet Valuation Procedure

The system tries to find available rates for the Time Sheet in the following order, individually for each of the rates (wage / price):

1. Project's [Work Price List](#)
2. if not found, then continue to Folder's [Work Price List](#)
3. if not found, then continue to [Work Contract](#)

Example:

- You may set individual Project price (external rate) EUR 99 / hour for the "Consultant" Type of contract. No wage (internal rate) is set-up at Project level.
- The user has "Consultant" Type of Contract set at her Work Contract settings, with EUR 25 / hour wage (internal rate).
- The Time sheet entered by User on Project will be valued: EUR 25 / hour wage (internal rate) & EUR 99 / hour price (external rate)

# Time Sheet Settings

## Time Sheet Locking

It is possible to set-up auto-lock Time Sheet entering for X number of (working) days. Working days are setup from Monday to Friday.

In Time Sheet Coefficient Settings screen, set-up the number of working days, after which users will not be able to enter any new or amend existing Time Sheet records. In order to enable updating older records, this lock has to be removed (clean the field & apply).

Time Sheet Coefficient

New Delete Apply coefficients on timesheets from

Type	Contract type	Type of work	Coefficient	Chargeable	Description
Time Sheet	Default	Default		No change	soc/zdr = 1.3456; cost per oi

Minute rounding: 5 Time Sheet Locking (days): 3 Cancel Apply Save

Profiles  
Registers  
View  
Activity Panel Presets  
Activity Panel  
Context  
Setup payment warning  
Users  
User templates  
Background  
Other  
Tracking Categories  
Workflow Actions  
Workflow Filters  
Workflow  
International  
Manage Print Templates  
About Lagoon  
Logger  
Time Planning  
Event Workflow  
Resource Categories  
Standard Texts  
Task Escalation  
Task Templates  
Task Workflow  
Time Sheet Coefficient

Revision #1

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