

# **Printed Documentation**

---



# Table Of Contents

|  |    |
|--|----|
| Welcome to TimeLive .....  | 9  |
| Installation For On-Premises Version .....                                     | 11 |
| TimeLive Installation Types: .....   | 11 |
| System requirements (On-Premises version): .....                               | 11 |
| Server Requirements .....  | 12 |
| Operating System (Any).....  | 12 |
| Minimum Hardware Requirement: .....  | 12 |
| Recommended Hardware: .....  | 12 |
| Software (higher is better) .....  | 12 |
| Web Server requirements for different OS: .....                                | 12 |
| Database Requirements: .....   | 13 |
| Client Requirements: .....   | 13 |
| Operating System (Any one) : .....   | 13 |
| Minimum Hardware Requirement (Higher is better): .....                         | 14 |
| Software (Latest is better): .....   | 14 |
| Installing Web Server (IIS).....   | 14 |
| Installing Web Server (IIS) on Windows XP: .....                               | 14 |
| Installing Web Server (IIS) on Windows Vista: .....                            | 15 |
| Installing Web Server (IIS) on Windows Server 2003 (32 bit & 64bit):.....      | 17 |
| Installing Web Server (IIS) on Windows Server 2008 (32 bit & 64bit) .....      | 19 |
| Installing TimeLive on local server: .....                                     | 22 |
| Upgrading TimeLive on local server .....                                       | 27 |
| TimeLive Database Setup:.....  | 27 |
| Database setup parameter definition: .....                                     | 28 |
| TimeLive System Settings .....   | 29 |
| Specifying System parameters:.....   | 29 |
| Defining System parameters:.....   | 29 |
| Understanding TimeLive Website URL: .....                                      | 30 |
| TimeLive License Activation Guide: .....                                       | 30 |
| Installation on Shared Hosting .....   | 31 |
| 1. Introduction.....   | 31 |
| 2. Installation and Setup .....  | 31 |
| 3. Upgrading TimeLive on shared hosting .....                                  | 31 |
| Getting Started.....   | 33 |
| What you can do in TimeLive?.....  | 33 |
| What you can do in TimeLive?.....  | 34 |
| Launching TimeLive (First Time): .....   | 35 |
| Creating new TimeLive Account: .....   | 35 |
| Account Information: .....   | 35 |
| First time login in TimeLive: .....  | 36 |
| Steps of login: .....  | 36 |
| TimeLive Dashboard is by default set as home page: .....                       | 37 |
| Using Menus:.....  | 38 |
| Quick Basic Setup .....  | 40 |
| 1. Creating employees: (Click to launch detail help of adding Employees) ..... | 41 |
| 2. Creating of Clients: (Click to launch detail help of adding Clients).....   | 41 |
| 3. Creating of Projects: (Click to launch detail help of adding Clients) ..... | 41 |
| 4. Creating of Tasks: (Click to launch detail help of adding Clients) .....    | 41 |
| Dashboard Settings .....   | 41 |
| Timesheet Setup.....   | 45 |
| Client Setup: .....  | 45 |
| Client Information fields:.....  | 46 |
| Adding new Client: .....   | 46 |
| Deleting Client: .....   | 47 |
| Editing Client: .....  | 47 |
| Project Setup: .....   | 47 |

|   |    |
|---|----|
| Working with Projects List Page.....                | 47 |
| Project Fields: .....                               | 48 |
| Adding new Project:.....                            | 48 |
| Deleting Project: .....                             | 49 |
| Editing Project: .....                              | 49 |
| Editing Project Team.....                           | 49 |
| Task Setup.....                                     | 49 |
| Task Fields: .....                                  | 50 |
| 1. Task Information.....                            | 50 |
| 2. Assign To .....                                  | 50 |
| 3. Estimates .....                                  | 50 |
| List of Task (two options) .....                    | 50 |
| Adding New task [Standard Employee].....            | 53 |
| Updating Task:.....                                 | 53 |
| Adding Task Comments: .....                         | 53 |
| Attaching document with any task: .....             | 54 |
| Working Day Types .....                             | 54 |
| My Tasks.....                                       | 58 |
| My Projects .....                                   | 59 |
| Project Preferences :.....                          | 60 |
| Work Type Setup .....                               | 60 |
| Work Type in TimeLive:.....                         | 60 |
| Default Work Types in TimeLive: .....               | 61 |
| Time Entry Day View with [Work Type] field: .....   | 63 |
| Time Entry Week View with [Work Type] field: .....  | 63 |
| Timesheet.....                                      | 65 |
| Time Entry .....                                    | 65 |
| Timesheet formats: .....                            | 65 |
| Time Entry - Day View .....                         | 67 |
| Features of Time Entry - Day View: .....            | 67 |
| Adding of Time entry record using Day View: .....   | 68 |
| Deleting of time entry record: .....                | 68 |
| Updating time entry record:.....                    | 68 |
| Submitting time entry record: .....                 | 68 |
| Time Entry - Period View.....                       | 69 |
| Features of Time Entry - Period View: .....         | 69 |
| Adding of Time entry record using Period View:..... | 71 |
| Deleting of time entry record: .....                | 71 |
| Updating time entry record:.....                    | 71 |
| Submitting time entry record: .....                 | 72 |
| Submitting a Timesheet .....                        | 72 |
| Timesheet Approval.....                             | 73 |
| Launching Timesheet Approval:.....                  | 74 |
| Approving timesheet records: .....                  | 74 |
| To review a time sheet record:.....                 | 74 |
| To Reject a time sheet record: .....                | 75 |
| Approval Types (Workflows) .....                    | 75 |
| Approval Paths:.....                                | 76 |
| Approver types: .....                               | 76 |
| Simultaneous / Alternate Approvals .....            | 76 |
| More About Attendance Module:.....                  | 76 |
| Attendance through Employee Profile.....            | 76 |
| Attendance through Time Entry Day View.....         | 78 |
| How to add new attendance record:.....              | 80 |
| How to enter employee leave record:.....            | 80 |
| How to modify attendance record: .....              | 80 |
| How to delete attendance record: .....              | 80 |
| Timesheet Audit in My Timsheet: .....               | 81 |
| Expense Sheet Setup .....                           | 83 |

|  |     |
|--|-----|
| Expense Types setup .....                              | 83  |
| Adding new Expense type: .....                         | 83  |
| Deleting Expense Type: .....                           | 83  |
| Editing Expense Type: .....                            | 84  |
| Expenses Code Setup .....                              | 84  |
| Setting up Expenses: .....                             | 84  |
| Adding new expenses: .....                             | 84  |
| Deleting Expense: .....                                | 85  |
| Editing Expense: .....                                 | 85  |
| Payment Methods.....                                   | 85  |
| Renaming "Default payment method": .....               | 85  |
| Adding new payment method: .....                       | 85  |
| Deleting Department: .....                             | 86  |
| Editing Payment Method: .....                          | 86  |
| Tax Code Setup .....                                   | 86  |
| Renaming "Default tax code": .....                     | 86  |
| Adding new tax code: .....                             | 86  |
| Deleting Department: .....                             | 87  |
| Editing Tax Code: .....                                | 87  |
| Expenses .....   | 89  |
| Expense Entry .....                                    | 89  |
| More about Expense sheet list : .....                  | 89  |
| Add new Expense sheet : .....                          | 89  |
| Adding expense entry : .....                           | 90  |
| Attaching documents expense entry : .....              | 91  |
| Deleting Expense Entry: .....                          | 91  |
| Editing Expense Entry: .....                           | 91  |
| Submitting expense sheet: .....                        | 91  |
| Expense Approval.....                                  | 91  |
| Launching Expense Approval: .....                      | 91  |
| Approving expense records:.....                        | 91  |
| To review expense sheet: .....                         | 92  |
| To Approve a expense sheet records: .....              | 92  |
| To Reject a expense sheet record: .....                | 92  |
| Time Off .....   | 95  |
| Time Off Overview.....                                 | 95  |
| Features Of Time Off Module in TimeLive:.....          | 95  |
| Time Off Types: .....                                  | 95  |
| Adding New Time Off Type: .....                        | 96  |
| Deleting Time Off Type: .....                          | 96  |
| Editing Time Off Type: .....                           | 96  |
| Time Off Policies .....                                | 96  |
| Time Off Request .....                                 | 98  |
| Adding New Time Off Request: .....                     | 98  |
| Viewing Time Off Request: .....                        | 99  |
| Editing of Time Off Request: .....                     | 99  |
| Deleting of Time Off Request: .....                    | 100 |
| Time Off Approval .....                                | 100 |
| To Approve a time off record: .....                    | 100 |
| To reject a time off request: .....                    | 100 |
| Billing Rate Setup .....                               | 101 |
| TimeLive billing rates concepts.....                   | 101 |
| Employee Own Billing Rate .....                        | 101 |
| Billing Rate History link in employee edit page: ..... | 101 |
| Project Roles Billing Rate.....                        | 103 |
| Project based employee billing rate: .....             | 106 |
| Invoicing.....   | 109 |
| About Invoicing.....                                   | 109 |
| Manage Invoices .....                                  | 109 |

|  |     |
|--|-----|
| Time Billing Worksheet .....                                       | 111 |
| Expense Billing Worksheet.....                                     | 111 |
| Project Management.....  | 113 |
| E-mail Notifications And Alerts .....                              | 115 |
| E-mail Notifications and Alerts .....                              | 115 |
| E-mail settings.....   | 115 |
| System Setup.....  | 117 |
| Launching Admin Options:.....                                      | 117 |
| System settings which can be configured using Admin Options: ..... | 117 |
| Branches / locations setup.....                                    | 119 |
| Adding new locations: .....  | 119 |
| Deleting Location: .....   | 119 |
| Editing Location: .....  | 119 |
| Departments setup.....   | 119 |
| Renaming "Default Department": .....                               | 120 |
| Adding new department: .....                                       | 120 |
| Deleting Department: .....   | 120 |
| Editing Department: .....  | 120 |
| Roles setup .....  | 120 |
| Adding new Roles: .....  | 121 |
| Deleting Role: .....   | 121 |
| Editing Role: .....  | 121 |
| Task Type setup.....   | 121 |
| Adding new task type: .....  | 122 |
| Deleting Task type: .....  | 122 |
| Editing Task Type: .....   | 122 |
| Priorities setup.....  | 122 |
| Adding new priority: .....   | 123 |
| Deleting priority: .....   | 123 |
| Editing priority: .....  | 123 |
| Role Permissions setup .....                                       | 123 |
| Pre-defined roles:.....  | 123 |
| Updating permission of role: .....                                 | 124 |
| Billing Types setup .....  | 124 |
| Adding new billing type: .....                                     | 124 |
| Deleting billing type:.....  | 125 |
| Editing billing type:.....   | 125 |
| Absence Type Setup .....   | 125 |
| Adding new Absence type:.....                                      | 125 |
| Deleting Absence Type:.....  | 125 |
| Editing Absence Type:.....   | 125 |
| Project Types Setup.....   | 125 |
| Adding new Project type: .....                                     | 126 |
| Deleting Project Type:.....  | 126 |
| Editing Project Type: .....  | 126 |
| Status Types setup.....  | 126 |
| Adding new Status: .....   | 127 |
| Deleting Status: .....   | 127 |
| Editing Status: .....  | 127 |
| Employee setup .....   | 127 |
| Employee Information field:.....                                   | 128 |
| Personal Fields: .....   | 128 |
| Login Information fields: .....                                    | 128 |
| Billing Fields .....   | 129 |
| Adding new employee:.....  | 129 |
| Deleting Employee: .....   | 129 |
| Editing Employee: .....  | 129 |
| External Users setup.....  | 129 |
| Adding new External User: .....                                    | 130 |

|  |     |
|--|-----|
| Deleting External User: .....  | 130 |
| Editing External User: .....   | 130 |
| Preferences .....  | 130 |
| Organization : .....   | 131 |
| General Preferences : .....  | 131 |
| Invoice Setup : .....  | 133 |
| Task Setup : .....   | 134 |
| Project Setup : .....  | 134 |
| Time Off Setup : .....   | 135 |
| Expense Setup : .....  | 136 |
| Timesheet Setup : .....  | 137 |
| Security : .....   | 140 |
| Holiday Setup: .....   | 140 |
| Adding Holiday Type: .....   | 141 |
| Deleting Holiday Type: .....   | 142 |
| Editing Holiday Type: .....  | 142 |
| Manage Terminology .....   | 142 |
| Defining new Manage Terminology: .....   | 142 |
| Custom Fields: .....   | 143 |
| Currencies: .....  | 145 |
| Timesheet Period View: .....   | 148 |
| Project Template: .....  | 150 |
| Reports.....   | 153 |
| Understanding Reports .....  | 153 |
| Report Home Page : .....   | 153 |
| Parts of report: .....   | 155 |
| Running a Report .....   | 155 |
| Exporting a Report .....   | 155 |
| Printing a Report .....  | 155 |
| System Reports .....   | 156 |
| Understanding Report Designer.....   | 157 |
| Report Data-source: .....  | 157 |
| Report Designer Steps: .....   | 158 |
| Understanding Formula Columns.....   | 161 |
| Formula Column Syntax .....  | 163 |
| Integration.....   | 165 |
| Importing / Exporting Raw Data .....   | 165 |
| QuickBooks Integration .....   | 165 |
| Using TimeLive QuickBooks Integration Tool .....                                       | 165 |
| Exporting Time to QuickBooks.....  | 172 |
| QuickBooks Online Integration .....  | 179 |
| Configuring Active Directory Authentication .....                                      | 184 |
| TimeLive Active Directory integration concepts: .....                                  | 184 |
| Step by step: Active Directory integration: .....                                      | 185 |
| Step1: Changes required in Active Directory: .....                                     | 185 |
| Step 2: Changes required in TimeLive:.....   | 188 |
| Note: Migrating from standard authentication to Active Directory authentication: ..... | 190 |
| Active Directory authentication with TimeLive On-Cloud .....                           | 191 |
| Configuring LDAP Authentication .....  | 206 |
| Mobile Apps.....   | 209 |
| Introduction to TimeLive Mobile App. ....  | 209 |
| Download TimeLive Mobile Time Tracking For Android & iPhone .....                      | 209 |
| TimeLive Android App Entries: .....  | 210 |
| F.A.Q.....   | 219 |
| Disabling Pop-Up Blockers .....  | 219 |
| Settings required on Internet Explorer 7 .....   | 219 |
| Instructions required to be done in IE7: .....   | 219 |
| Frequently Logout Issue By Users .....   | 220 |



# Welcome to TimeLive

## The Industry Standard in Web based Timesheet management tools

### About TimeLive:

TimeLive is a web-based, timesheet management application that provides Timesheet Control and Project Management for workgroups of any size or complexity. With TimeLive you can record time and expenses quickly and easily at any time, from anywhere with Internet access. Once submitted, Timesheets and Expenses are automatically forwarded to the appropriate supervisor or manager for approval. Additionally, reports can be generated to track data such as project costs, client billing, utilization, and time off.

Unlike traditional PC applications or client-server applications, the only software that is required on each user's PC is a standard Javascript-enabled web browser.

<http://www.livetecs.com>

### Notices:

Copyright © 2006, Livetecs. All Rights Reserved. Livetecs ®, the Livetecs logo, TimeLive Timesheet™, and the other graphics, logos, and service names are trademarks and service marks of Livetecs. All other product names, service names and company names are the property and/or trademarks of their respective owners.

All rights, title and interest in and to the Software, and any Updates or New Releases thereto or derivative works thereof, including without limitation all intellectual property and other industrial and proprietary rights, at all times remain the exclusive property of Livetecs or Livetecs's licensors. The license granted does not constitute a sale of the Software, or any portion or copy thereof.

Livetecs provides this document "as is" and without warranty of any kind, whether express or implied, to the full extent permitted under applicable law, the company specifically disclaims the implied warranties of merchantability, fitness for a particular purpose, title, and infringement. Livetecs does not guarantee the accuracy, timeliness, or completeness of any information in this document or the results of your use of this document.



# Installation For On-Premises Version

## TimeLive Installation Types:

TimeLive is available from Livetecs in a variety of installations:

### On-Demand/Cloud-Based (Hosted) implementation:

The Cloud version of TimeLive is implemented on servers managed by Livetecs. The application is available to users through the Internet, using a web address provided by Livetecs or through the Customer Login section of the TimeLive website which can be accessed from any place of the world with internet access. By signing up for the Cloud version, you are saved from overhead of purchasing and maintaining application and database servers. For more details, Please [Click Here](#).

- 1. Free Version up to 3 users with 3 Projects:**  
The Hosted Free Version is designed to assist user in evaluating the application as well as it is ideal for small companies to benefit from this powerful robust application. It is limited to 3 users and 3 Projects but enables unlimited use. Any data entered in the Free Version can be migrated to the full version. For Trial & Free Cloud-based Version, [Click Here](#).
- 2. Full Version:**  
The full Cloud-based version is provided when user are ready to purchase and implement TimeLive for use in organization. It supports unlimited number of users (depending on Purchase Plan), Projects and tasks. For Pricing, please [Click Here](#). To Sign up [Click Here](#).

### On-Premises installation:

With standard installer, Administrator can install and manage the TimeLive application and database within the organization. It is installed using a file provided by Livetecs and Application is available for users through network. For more details, please [Click Here](#).

There are two types of standard installations available:

- 1. Free Version up to 3 users with 3 Projects:**  
The free version is designed to assist user in evaluating the application as well as it is ideal for small companies to benefit from this powerful, robust application. The simplified installation process allows user to install it on their local computer. It is limited to 3 users and 3 Projects but enables unlimited use. Any data entered in the Free Version can be migrated to the full version any time. For Free On-Premises Application, [Click Here](#).
- 2. Full Version:**  
The full version is provided when user is ready to purchase and implement TimeLive for use in the organization. It is installed on a local server. It supports unlimited number of users (depending on Purchase Plan), Projects and tasks. For Pricing, please [Click Here](#). To download On-Premises Application, [Click Here](#).

For information on evaluating or purchasing either type of TimeLive Application, visit our website at [Livetecs.com](http://Livetecs.com), contact us through Live Chat or e-mail us on [sales@livetecs.com](mailto:sales@livetecs.com)

### System requirements (On-Premises version):

The sections that follow provide the system requirements for each type of TimeLive installation.

## **Standard Full Version:**

Below are the requirements for the full version of the standard (non-hosted) installation, which requires an application server, a database platform, and client machines.

## **Server Requirements**

The server on which TimeLive is installed must meet the following requirements.

### **Operating System (Any)**

- Windows 2000 with Service Pack 4
- Windows XP Professional with Service Pack 2 or higher (32bit / 64bit)
- Windows Server 2003 (32bit / 64bit)
- Windows Vista (32bit / 64bit)
- Windows Server 2008
- Windows 7 (service pack 1)
- Windows Server 2012 (R1/R2)
- Windows 8.1 (32bit / 64bit)
- Windows 10 (32bit / 64bit)

### **Minimum Hardware Requirement:**

- Pentium III, 800 MHz Processor
- 512 MB of RAM
- 1 GB of hard disk free space
- SMTP-compliant E-mail server

### **Recommended Hardware:**

- Pentium IV, 1.4 GHz Processor or higher
- 2 GB of RAM or more
- 10 GB of hard disk space or more
- SMTP-compliant E-mail Server

### **Software (higher is better)**

- Microsoft Windows Installer 3.1 (Built-in)
- Microsoft .NET Framework 4.0 (Built-in)
- Microsoft Data Access Components (MDAC) 2.8 (Built-in)
- Microsoft SQL Server 2008 Express Edition (Built-in)
- Optional: Microsoft Internet Information Services (IIS) 5.0 (built-in in operating system). TimeLive setup automatically install TimeLive internal web server (Cassini), in case if IIS will not available on system where TimeLive is being installed.

### **Web Server requirements for different OS:**

| <b>Operating System</b>                         | <b>Web Server</b> |
|---|-------------------|
| Windows 10 (32 bit and 64 bit)                  | Microsoft IIS 7.0 |
| Windows 7 (32 bit and 64 bit)                   | Microsoft IIS 7.0 |
| Windows Vista (32 bit and 64 bit)               | Microsoft IIS 7.0 |
| Windows Server 2003 (32 bit and 64 bit)         | Microsoft IIS 6.0 |
| Windows Server 2008 (R1,R2) (32 bit and 64 bit) | Microsoft IIS 7.0 |
| Windows XP Professional (32 bit and 64 bit)     | Microsoft IIS 5.1 |
| Windows 2000 (32 bit and 64 bit)                | Microsoft IIS 5.0 |

## **Database Requirements:**

TimeLive requires any of the following database platforms be installed, either on the TimeLive server or on a server accessible by TimeLive.

- Microsoft SQL Server 2012
- Microsoft SQL Server 2008
- Microsoft SQL Server 2005
- Microsoft SQL Server 2008 Express Edition (included in TimeLive Installer). It can be disabled by selecting **[Custom]** installation during installation.
- Microsoft SQL Server 2000 (MSDE and Server both)

## **Client Requirements:**

Each computer being used to access the TimeLive system must have

## **Operating System (Any one) :**

- Windows 9x
- Windows NT
- Windows 2000
- Windows XP
- Windows 2003
- Windows Vista
- Windows 7
- Windows 8.1

- Windows 10
- Macintosh OS X
- Linux workstations and UNIX terminals running X Windows
- Windows Server 2008
- Windows Server 2012

## **Minimum Hardware Requirement (Higher is better):**

- Pentium III, 450 MHz processor
- 256 MB RAM
- Monitor resolution (1024 x 768)

## **Software (Latest is better):**

On Windows-based systems, Application may require any one of the following,

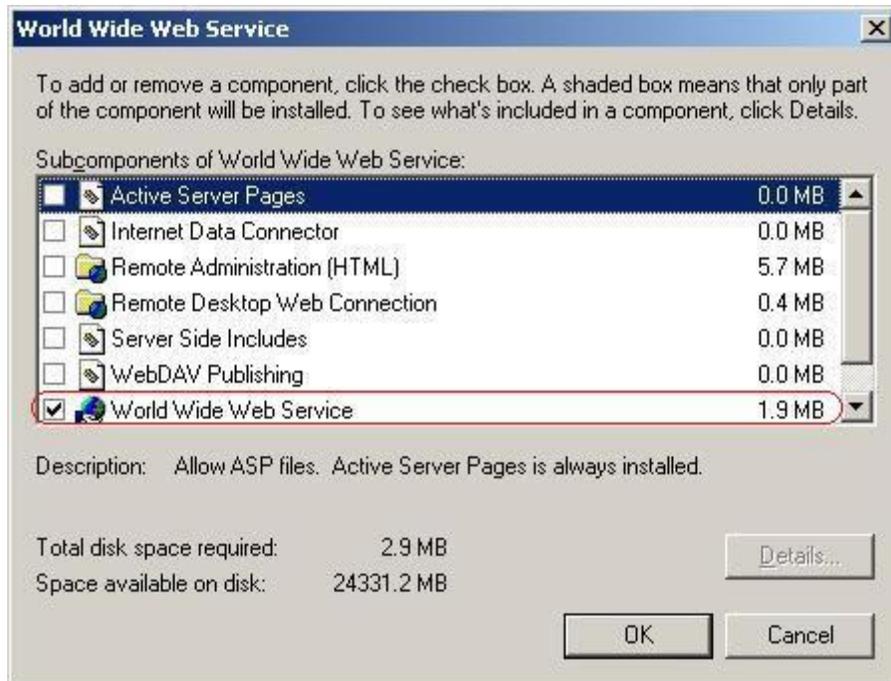
- Microsoft Edge
- Google Chrome (Version 31.0)
- Safari (Version 7.1)
- Microsoft Internet Explorer (Version 7.0)
- Mozilla Firefox (Version 33.0)

## **Installing Web Server (IIS)**

### **Installing Web Server (IIS) on Windows XP:**

#### **Installing IIS on Windows XP Pro:**

1. If you are running Windows XP Professional on your computer you can install Microsoft's web server, Internet Information Server 5.1 (IIS) for free from the Windows XP Pro installation CD and configure it to run on your system by following the instructions below: -
2. Place the **Windows XP Professional CD-Rom** into your CD-Rom Drive.
3. Open '**Add/Remove Windows Components**' found in 'Add/Remove Programs' in the 'Control Panel'
4. Place a **tick** in the check box for 'Internet Information Services (IIS)' leaving all the default installation settings intact.

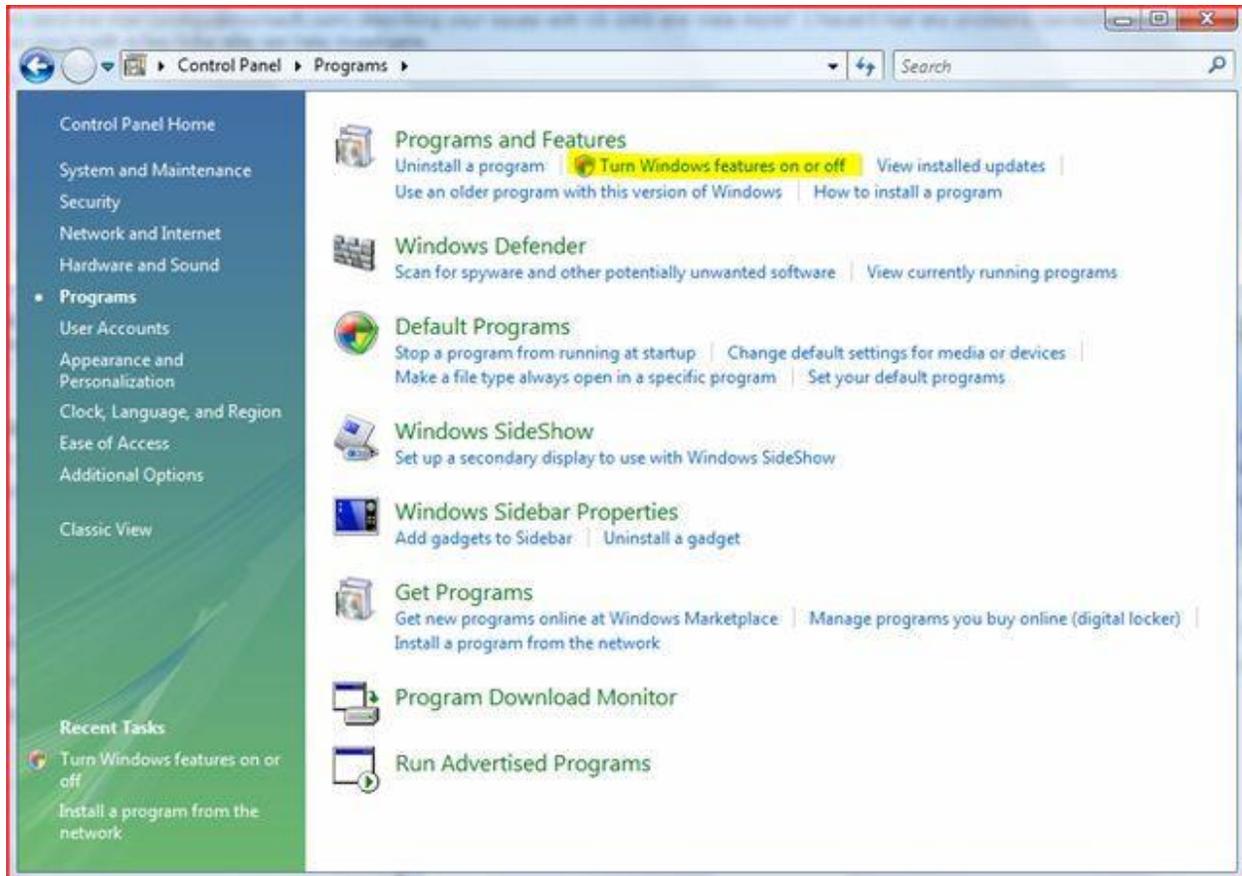


4. Click **OK** to start **IIS** installation.

## Installing Web Server (IIS) on Windows Vista:

### Installing IIS on Windows Vista:

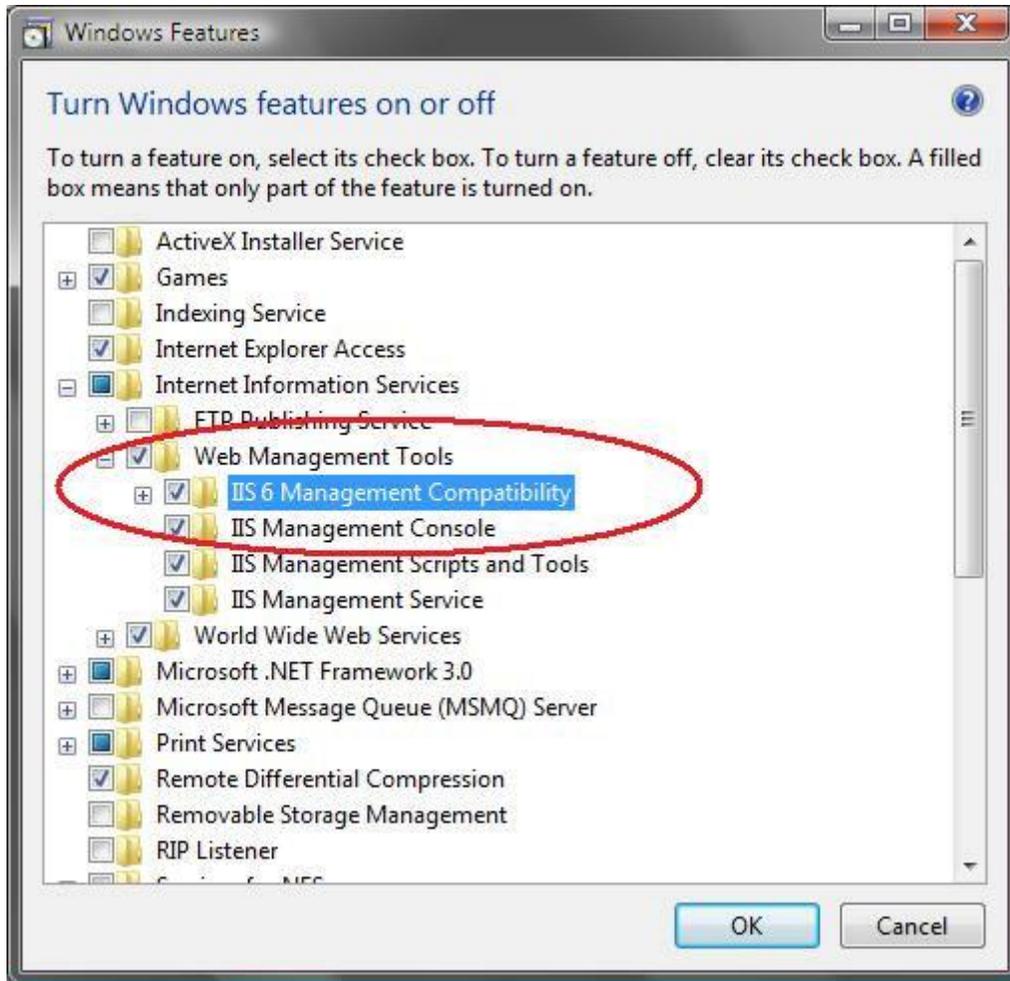
1. In Windows Vista, open **Control Panel** and then click **Programs and Features**.
2. In the right pane, click **Turn Windows features on or off**.



3. The **Windows Features** dialog box opens.
4. Select the **Internet Information Services** check box.
5. Double-click (or expand) **Web Management Tools**, double-click **IIS 6 Management Compatibility**, and then select the **IIS 6 Metabase and IIS 6 Configuration Compatibility** check box.
6. Double-click (or expand) **World Wide Web Services**, double-click **Application Development Features**, and then select the **ASP.NET** check box.

The related options that are necessary for Web application development will automatically be selected.

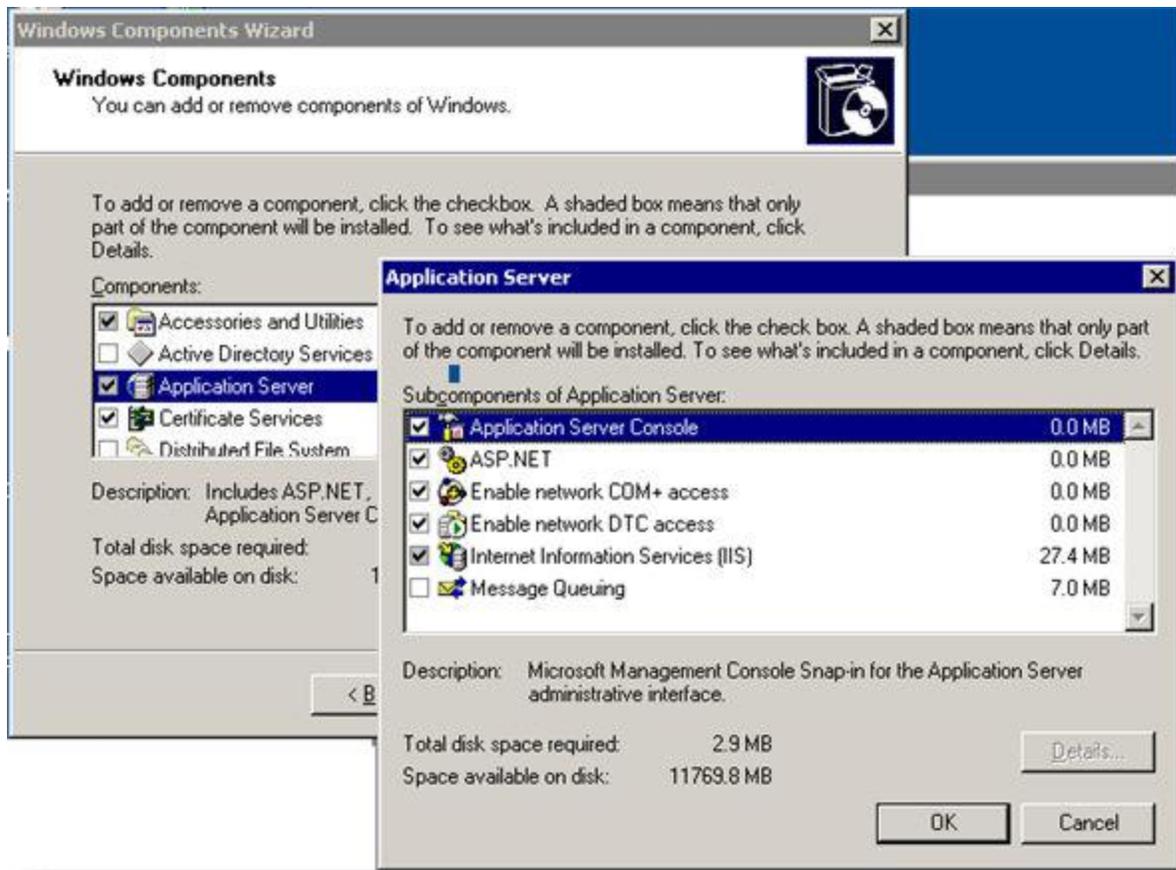
7. Click OK to start the **ASP.NET** installation process.



## Installing Web Server (IIS) on Windows Server 2003 (32 bit & 64bit):

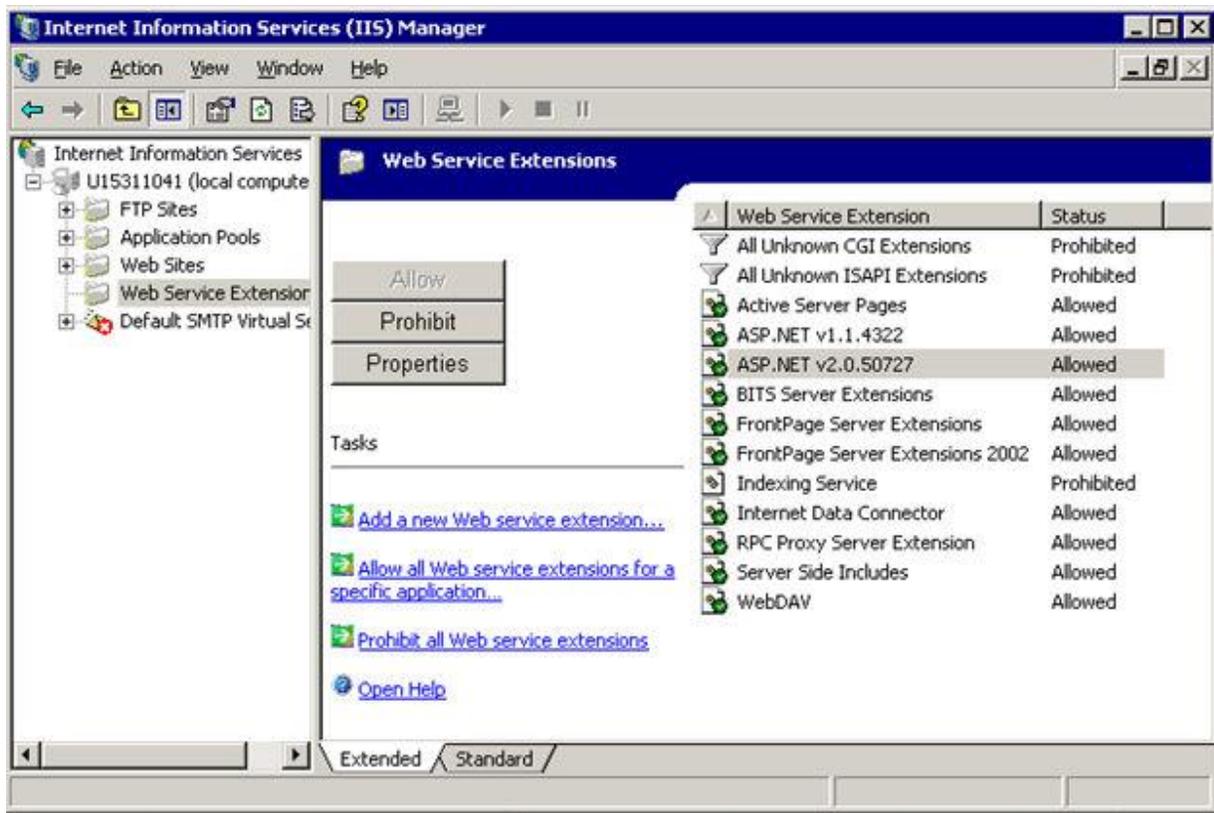
### Installing IIS on Windows Server 2003:

- Click Start, point to Settings, and click Control Panel
- Double-click Add or Remove Programs.
- Click Add/Remove Windows Components.
- Double-click Application Server.
- Check if ASP.NET check box is selected. If not selected, select it.



## Enabling Web Server Extensions for ASP.Net 2-Windows Server 2003 (32 bit and 64 bit):

- Click Start, point to Settings-> Control Panel, double-click the Administrative Tools and then double-click the Internet Information Services Manager. The Internet Information Services window is displayed
- Expand Web service Extensions.
- If ASP.NET is enabled, 'ASP.NET v2.0.50727' appears on right side. If the status is 'Prohibited' then select 'ASP.NET v2.0.50727' and click on 'Allow' button. Without these changes, the application will not work as desired.



## Installing Web Server (IIS) on Windows Server 2008 (32 bit & 64bit)

### IIS on Windows Server 2008:

IIS 7.0 is one of the Windows Server 2008 Server Roles. IIS can be installed through the GUI using the new Server Manager interface after the Windows Server 2008 OS is installed.

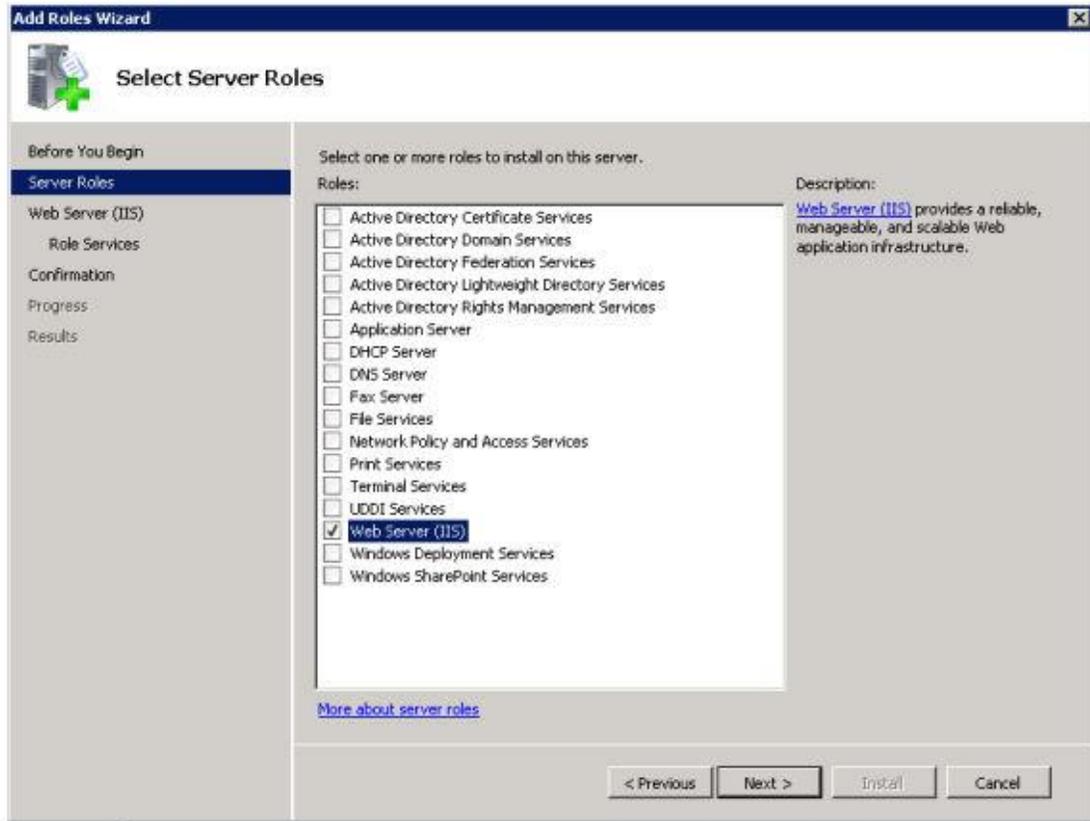
Server Manager provides a single dashboard to install or uninstall Server Roles and Features. It also gives an overview of all currently installed Roles and Features. When IIS 7.0 is chosen from the Server Manager, the basic components and services needed for IIS are automatically selected.

Installing IIS 7.0 on Windows Server 2008 is a little different from installing IIS 6.0, but it's still pretty straightforward using Server Manager.

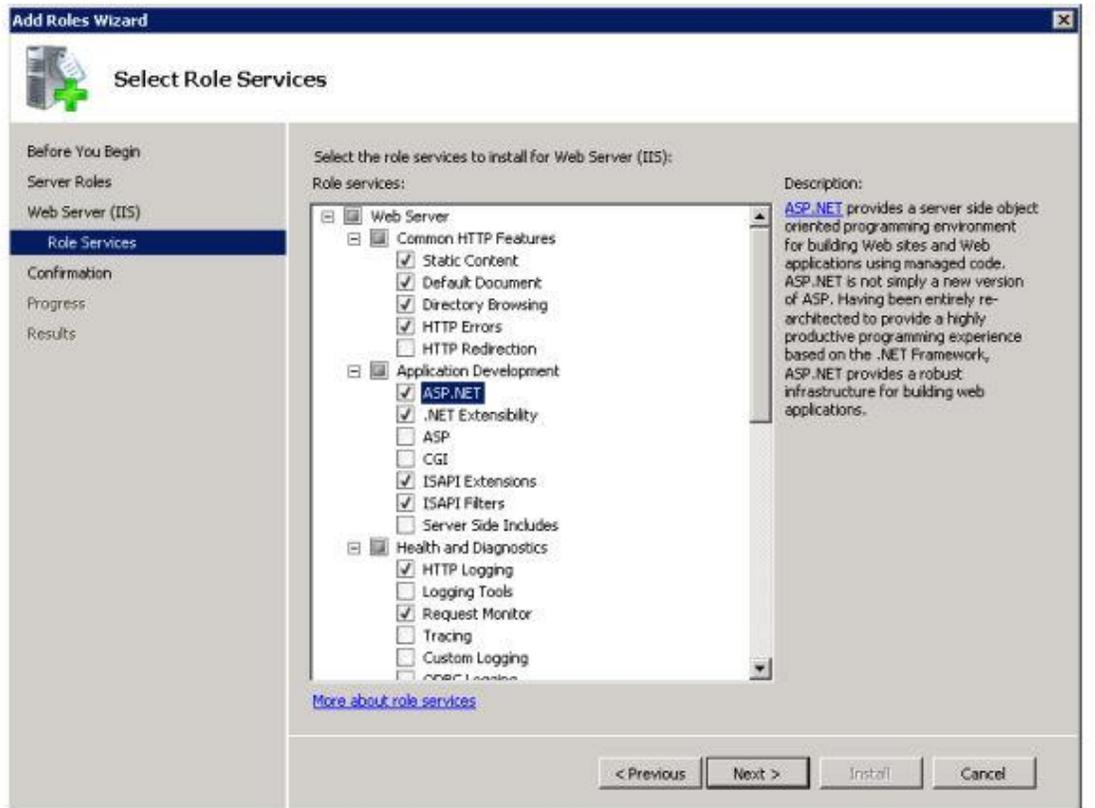
You can install IIS via Server Manager found in:

- Start Menu – Server Manager (it can also be found under: Start Menu – Administrative Tools – Server Manager)
- Select the “Add Roles” under Roles

- Select "Web Server (IIS)" on the Server Roles page:



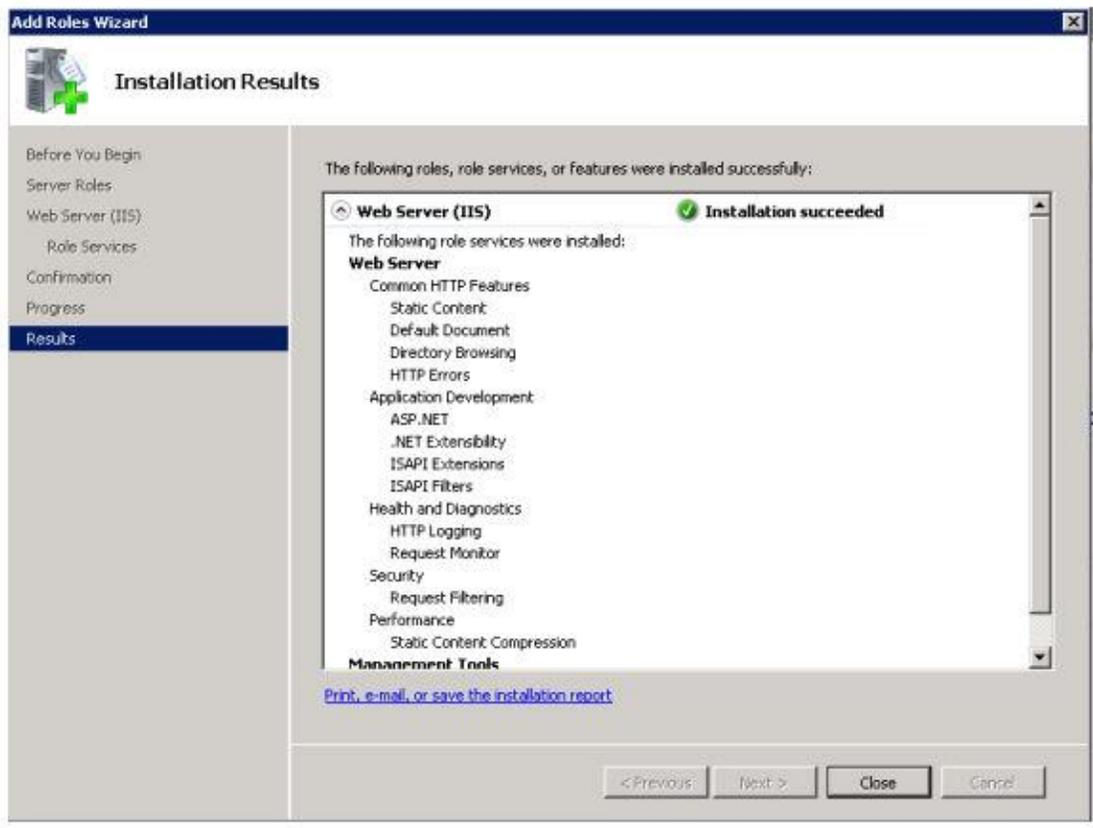
- Choose the IIS Services to be installed. In this case ASP.NET is to be installed. Select the services required by your applications:



- When choosing the above services, you might be prompted with a warning to install some required services for the selection above, if the services are not already installed:



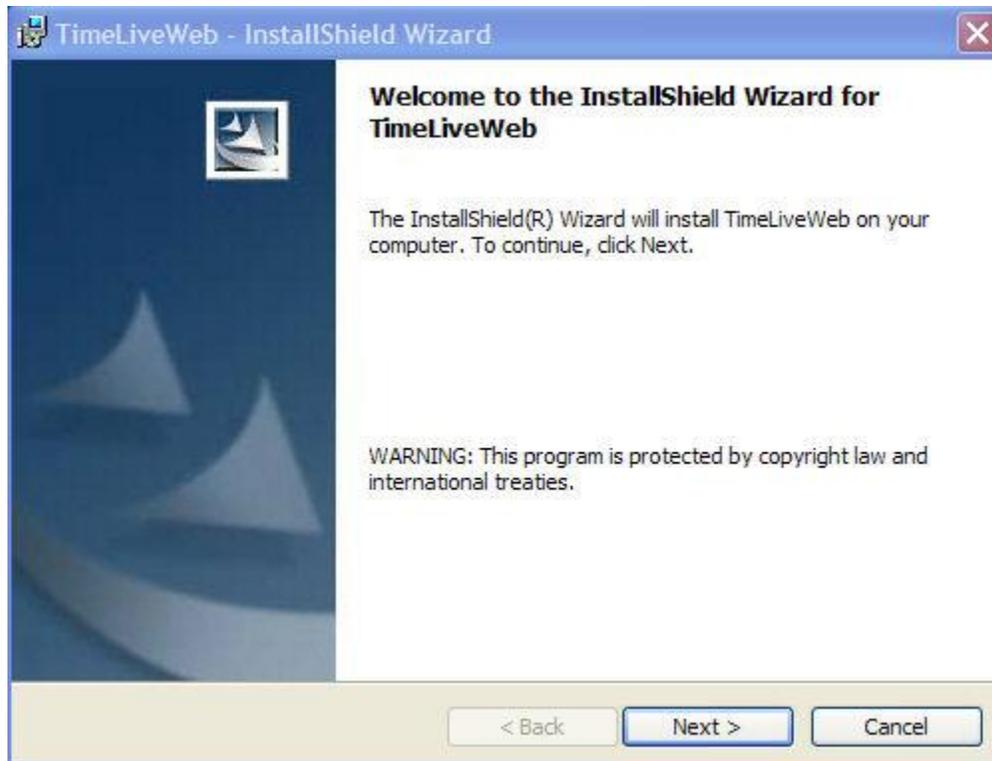
- IIS 7.0 is now installed with a default configuration for hosting ASP.NET on your Windows Server 2008:



### Installing TimeLive on local server:

### To install the local version of TimeLive:

1. TimeLive installer automatically install **[SQL Server 2008 Express Database]** engine during standard installation. SQL Server 2008 Express can be remove from installation by choosing "Custom" installation in feature selection dialog box.
2. If **[SQL Express 2008 Express Database]** is not selected in installation, TimeLive then first show a "TimeLive database setup page" which allows to create and setup TimeLive database on any standard SQL Server 2000, 2005, 2008 server which are already running in organization. This setup page creates new TimeLive database with all necessary tables and default data.
3. TimeLive automatically install its own internal web server (Cassini), if there is no IIS already available on system where TimeLive is being installed.
4. Download the free version of TimeLive from Livetecs website, and save it to your local computer.
5. Double click on TimeLive installation file to launch TimeLive Setup Wizard. When the TimeLiveWeb - Installshield Wizard window displays, select the **[Next]** button.



3. Read the license agreement. If you agree to its terms, select the **[I accept the terms of the license agreement]** radio button, and then select the Next button.



4. The installation program checks for the presence of Microsoft Windows Installer, Microsoft .NET Framework 2. If these necessary components are not present, the following window displays.
5. Enter your name and your organization name, and then select the Next button.

**TimeLiveWeb - InstallShield Wizard**

**Customer Information**

Please enter your information.

User Name:  
My Name

Organization:  
My Organization

Install this application for:

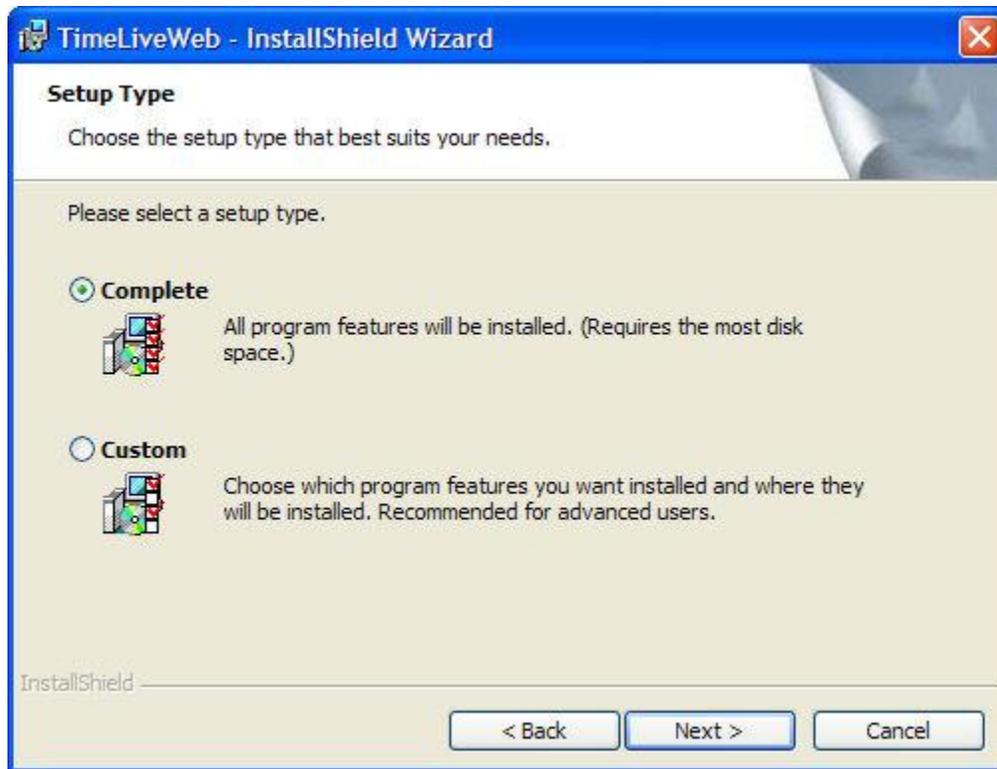
Anyone who uses this computer (all users)

Only for me

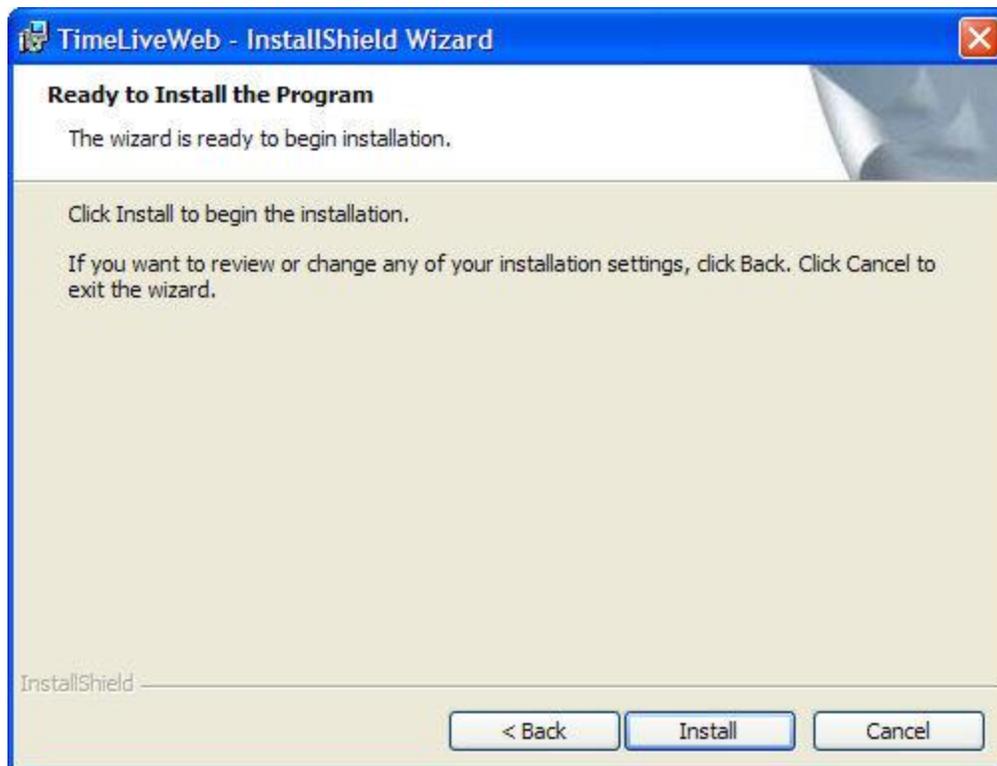
InstallShield

< Back    Next >    Cancel

6. Select **[Custom]** if SQL Express engine is not required in installation. Select the **[Complete]** radio button, and then select the **[Next]** button.



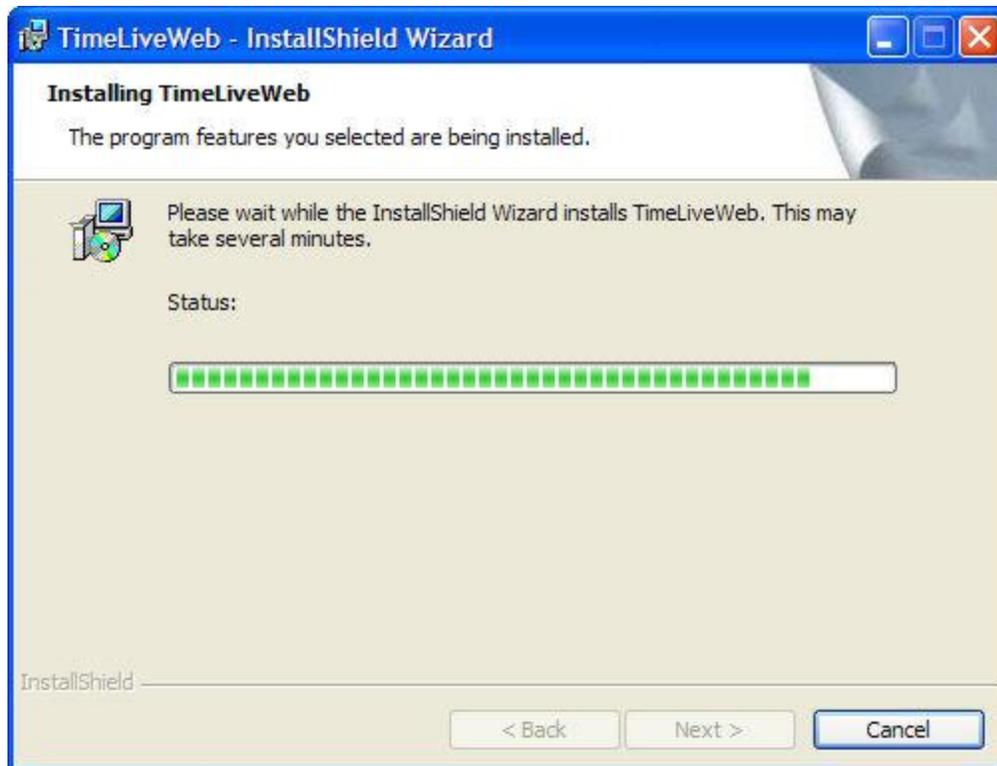
7. Now click on **[Next]** button to start TimeLive installation



8. A status showing that TimeLive is first installing "Microsoft SQL Server 2008 Express" on machine.



8. A Setup Status window displays that tracks the progress of the installation.

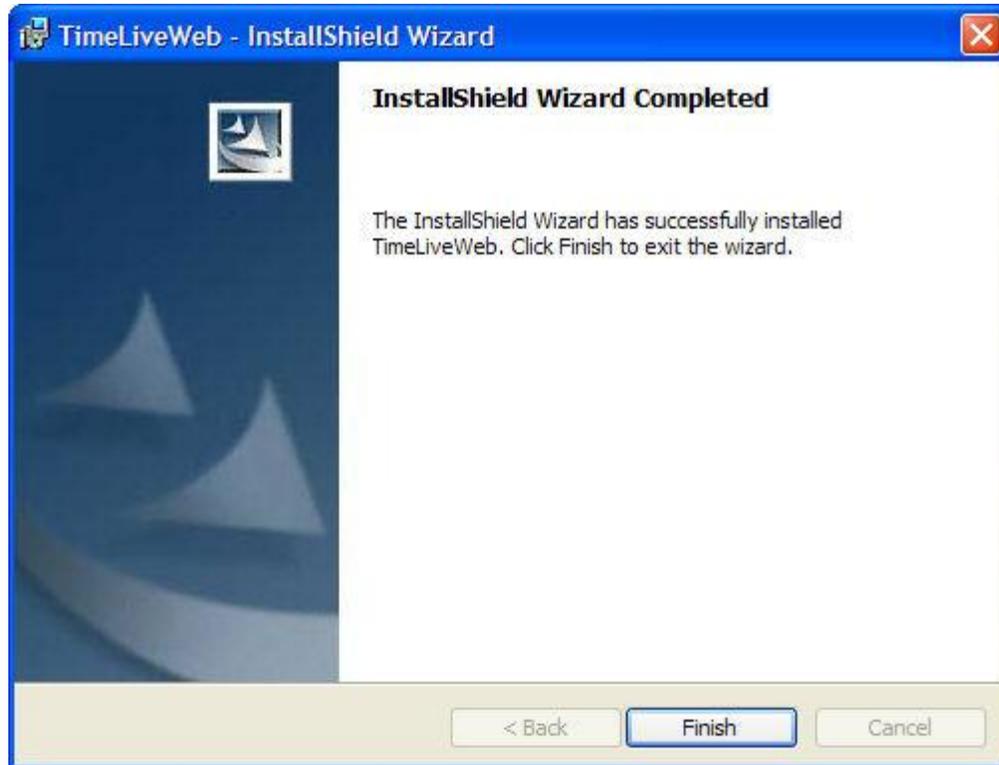


TimeLive requires that Microsoft Data Access Components (MDAC) be installed on your machine. At this point, the installation program will check for the presence of MDAC and

automatically install it if it is absent. This may take a few minutes

Once MDAC is installed, the computer may need to be restarted. Installation will automatically resume after the computer is restarted.

9. The InstallShield Wizard Complete window displays to indicate that installation was successful. To exit the installation program, click on **[Finish]** button.



10. TimeLive install SQL Server 2008 Express engine with instance name "TimeLive". This instance can be removed from the system using add/remove program in your control panel.
11. Please continue reading to "[Launching TimeLive \(First Time\)](#)" in order to launch TimeLive.
12. In case of installation without SQL Server 2008 Express engine, TimeLive first opens the database setup page when launched for the first time. Using the database setup page, a new database can be created as well as an already existing database can be pointed to the TimeLive application. Please continue reading to "[TimeLive database setup](#)" for setting up the TimeLive database.

## Upgrading TimeLive on local server

### To upgrade local installed version of TimeLive:

- a. Take backup of TimeLive folder and database before upgrade.
- b. Uninstall existing TimeLive version from add/remove program in control panel. Uninstall will not remove TimeLive configuration files and database files. Do not delete any files manually from the TimeLive installation folder.
- c. Install TimeLive new version.
- d. Launch TimeLive. On first launch, TimeLive will first upgrade the existing database with new changes and then will reach to the login page after upgrade. This process will take about 1 or 2 minutes.
- e. User can now login in TimeLive as usual with their existing TimeLive login and password.

### TimeLive Database Setup:

At first launch of TimeLive, system administration should create and setup TimeLive database, if **[SQL Server 2008 Express]** engine is excluded in feature selection dialog box. In this case, system administrator can setup TimeLive database by providing these parameters. Using this setup page, system administrator can create TimeLive database on any local or remote SQL server instance. SQL Server instance can be either SQL Server 2000, 2005 or 2008.

This utility can be launch separately also by opening below mentioned URL in your browser:  
<http://timeliveurl/Home/SetupDatabase.aspx>

Using database setup page, administrator can perform following database related functionalities.

1. **Create new database and populate schema:** (for setting up new database) This option creates a new database, new database user and populate tables and default data in it. This also updates TimeLive configuration file (web.config) with this newly defined database connection settings.
2. **Populate schema only (For shared hosting):** This button creates database tables, objects and default data in already created blank TimeLive database. This is useful for users who are setting up TimeLive database on a shared hosting environment where there are separate tool available for creating database. This also updates TimeLive configuration file (web.config) with this newly defined database connection settings.
3. **Use existing database:** This option will allow administrator to configure TimeLive with an existing TimeLive database.

Database Setup Information

Database Setup

This utility will create TimeLive database specified SQL Server Database Engine. This utility will create a blank TimeLive database with TimeLive schema. Administrator can create TimeLive database on their own corporate server. Server can be SQL Server 2000, 2005 and 2008.

Create Database and populate schema

Select database setup option:  Populate schema only (for shared hosting)

Use existing database

\* Server Name:  (SQL Server name or IP Address where TimeLive database is required to be setup.)

Instance Name:  (Optional SQL Server Instance Name)

\* Authentication Type:  (Type of authentication which is setup on your SQL Server)

SA Login:  (sa username: Either "sa" or "sql" equivalent. Only for SQL Server Authentication)

SA Password:  (sa user password. Required only for SQL Server Authentication)

\* Database Name:  (Name of database which is required to be setup on SQL Server specified instance)

\* Database Username:  (New TimeLive database username which will be created for TimeLive database)

\* Database User's Password:  (New TimeLive database user's password which will be created for TimeLive database)

Create Database and populate schema

## Database setup parameter definition:

- Server Name:** SQL Server database server name or IP address where SQL Server is installed. It can be any SQL Server 2000, 2005 or 2008 server address.
- Instance Name:** (Optional) SQL Server instance name, if SQL Server is setup with some named instance.
- Authentication Type:** SQL Server authentication type. TimeLive recommended authentication type is **[SQL Server Authentication]**, but system administrator can configure TimeLive database on windows authentication also.
- SA Login:** As this utility create a new TimeLive database and a new timelive database user, only sql server user with **[System Administrator]** can create new database on sql server.
- SA Password:** Password of "sa" or any system administrator equivalent login.
- Database Name:** Database name which is required to be created on SQL Server.
- TimeLive Username:** Name of user which will be created automatically by this utility for

accessing TimeLive database by TimeLive application.

**TimeLive DB Users' password:** Creates TimeLive DB user with this password.

## TimeLive System Settings

### Specifying System parameters:

System configuration page can be launch from [Start --> All Programs --> TimeLive --> System Configuration] on system where TimeLive is installed. System setting can be open directly by opening this URL in your browser.

<http://timeliveurl/home/systemsetting.aspx>

### Defining System parameters:

The screenshot shows the 'System Setting Information' page. It has a blue header and is organized into sections: 'Authentication Settings' with radio buttons for 'Default Authentication' (selected), 'Active Directory Authentication', and 'Open LDAP Authentication'; 'System Administration Settings' with 'System Admin Password' and 'System Admin Password Confirm' input fields; 'SMTP Settings' with 'SMTP Server' (text: 'YourSMTPServer'), 'SMTP Username', 'SMTP Password', 'SMTP Port Number' (text: '25'), and 'Use SSL' checkbox; and 'Other Settings' with 'Application URL' (text: 'http://TimeLive/'), 'Encrypt connection string' checkbox, and 'Connection String' (text: 'Data Source=Livetecs;Initial Catalog=TimeLive;Persist Security Info=True;User ID=TimeLive;Password=#TimeLivePassword'). An 'Update' button is at the bottom.

#### Authentication Type

TimeLive supports two types of authentication. One is default database based authentication. Using default authentication, user can login in TimeLive using their own username and password defined in TimeLive application by Administrator. Second is [Active Directory Authentication] where user can login in TimeLive using their corporate Active Directory username and password.

#### System Admin Password

TimeLive allows only system administrator user for accessing system configuration page. System administrator username is "SysAdmin". Administrator can access system configuration area by entering username as "SysAdmin" and its password.

#### SMTP Server

SMTP Server name which you are using in your organization for sending emails.

#### SMTP Username

Username of SMTP server if any (optional)

#### SMTP Server Password

Password of SMTP server (optional)

#### SMTP Port Number

SMTP default port is 25. You can change it to some other port if smtp server is configured on some other port other than 25.

#### Application URL

URL of TimeLive application which is accessible from your organization or from users from internet. It can be either local computer name of system where TimeLive is installed or it can be IP address of server or it can be full domain name.

#### Connection String

This is SQL Server connection string. By default, timelive

installation always install SQL Server 2008 Express edition on local server.

## Understanding TimeLive Website URL:

TimeLive's website URL depends on the type of server you are using, and has the following format:

| Server type                 | URL Format   |
|-----------------------------|--|
| <b>Cassini WebServer</b>    | http://server_name:15395/<br>or<br>http://IP_address:15395/        |
| <b>IIS</b>                  | http://server_name/TimeLive<br>or<br>http://IP_address/TimeLive    |
| <b>ASP (Hosted version)</b> | http://www.livetecs.com (login form of hosted version of TimeLive) |

Once the application is installed, administrators should distribute the site's URL, together with login information, to all users so they can access TimeLive via their web browser.

## TimeLive License Activation Guide:

By default, TimeLive downloadable version comes with 30 days pre-activated trial license key. This pre-activated trial license key supports unlimited users up to 30 days. After 30 days, it converts to 5 users free TimeLive.

To ensure that TimeLive is secure and is only registered by authorised users, we have a systematic activation procedure in place to safeguard the software's use.

There are two types of license activation available in TimeLive. One is online activation and second is manual activation. Online activation is a process of activating TimeLive by using license key, received by customer in TimeLive order email. Unfortunately this online activation process can be blocked by either a firewall or the proxy server settings on your system. In case of failure of online activation, customer can use manual activation, in order to activate TimeLive even without using of internet.

## Automatic Activation:

1. Navigate to **[Admin Options]**-->**[Preferences]** while login as an admin user.
2. Enter your license keys in **[License Key]** field.
3. Just make sure that **[Online Activation]** is selected.
4. Click on **[Activate]** button to activate TimeLive.
5. You will receive a message "**License Activated Successfully**" in case of successful license activation.
6. You may receive message "**Unable to activate license**", if TimeLive will not able to communicate with TimeLive license activation server. You can then try manual activation using instructions mentioned below.

## Manual Activation:

1. There are two major steps of manual activation. First is to request your manual license activation key by sending an email to [sales@livetecs.com] with **[machine name]** of system, where TimeLive is installed and order reference number. TimeLive machine name can be found in **[Machine Name]** field available in **[Admin Options]**--**[Preferences]**.
2. Once received manual license key, navigate to **[Admin Options]**-->**[Preferences]** while login as admin user.
3. Select your activation type to **[Manual Activation]**.
4. Enter manual license keys in **[Machine Key]** field.
5. Click on **[Activate]** button to activate TimeLive.

6. You will receive a message "**License Activated Successfully**" in case of successful license activation.

## Installation on Shared Hosting

1. Introduction
2. Installation and Setup
3. Upgrading TimeLive on shared hosting

### 1. Introduction

TimeLive Edition is a timesheet and expense management system based on current Microsoft Technologies. It is designed to run on an IIS 5.0 or 6.0 or 7.0 web server that has ASP.Net 4.0 installed. In addition, the software is designed to work with Microsoft SQL Server, Microsoft SQL Server Express Edition. TimeLive can be setup on ASP.Net/SQL Server supported shared hosting.

### 2. Installation and Setup

- TimeLive require "Full Trust" permissions on your shared hosting.
- Download the manual installer file from <http://www.livetecs.com/Release/TimeLiveWebForHosting.zip>
- Unzip the software to a folder on your computer's hard drive.
- Create a new (Domain or Website) from your hosting control panel for TimeLive.
- Upload, copy or FTP the entire TimeLive folder to your web server, including ALL the folders and files inside it. Do not change the file and folder structure. You would typically place the TimeLive folder in your web server's wwwroot directory, but it can also be copied to any sub-directory under a web site's root directory, as long as it is marked as an application starting point. You may have to ask you host for information about how to perform these steps.  
*<<Your web server must have the Microsoft .Net Framework 4.0 installed before TimeLive will function.>>*
- The following directories and files of the uploaded TimeLive installation need to have read, write, delete, and modify permissions in the file system:
  - /web.config (file)
  - /Uploads (folder)
  - /Log (folder)
  - /App\_data (folder)
- The following directories need to have "execute" and "read" permissions in the file system
  - /bin
- Create a new SQL Server database with name "TimeLive" from your hosting control panel. After creating database, note down the physical database name created using control panel.
- Create a new SQL Server database user from your hosting control panel with name "timelivedbuser" and assign this user to newly created "TimeLive" database.
- Launch "[TimeLive Database Setup](#)" page and setup TimeLive database on your shared hosting SQL Server.
- Now open "http://TimeLiveURL/Default.aspx" page where TimeLive URL should be URL pointing to TimeLive folder in your file system. This will launch TimeLive account add page where administrator can define their organization and administrator information.

### 3. Upgrading TimeLive on shared hosting

- Download the manual installer file from <http://www.livetecs.com/Release/TimeLiveWebForHosting.zip>

- Unzip the software to a folder on your computer's hard drive.
- Delete all files from TimeLive folder except
  - /web.config (file)
  - /Uploads (folder)
  - /Templates (folder)
- Upload, copy or FTP the entire TimeLive folder to your web server, including ALL the folders and files inside it except
  - /web.config (file)
  - /Uploads (folder)
  - /Templates (folder)
- Now open "http://TimeLiveURL/Default.aspx" page where TimeLive URL should be URL pointing to TimeLive folder in your file system. This will launch TimeLive login page after taking a while in executing database upgrade script on existing database.

# Getting Started

## What you can do in TimeLive?

**TimeLive Timesheet Suite** is integrated suite for managing project life cycle including projects, tasks, timesheet, expense and attendance etc.

## TimeLive tools:

These are the top level tools of TimeLive timesheet suite:

### 1. Employee Timesheet Management

1. Time entry using two format: Daily and weekly
2. Timesheet and expense approval (customizable timesheet approval path by defining work-flow path)
3. Allow external users (client) to approve their own project timesheet entered by employees.

### 2. Billing management

Three different types of billing rate types configurable at project level. Billing rate can be define with its applicable date range with complete history. Timesheet then pick billing rate based on time entry date from billing rate history defined at employee level, project role level or project employee level.

Different billing rate options:

- **Employee own billing rate** (System should pick employee own billing rate)
- **Project based employee billing rate** (System pick employee billing rate defined for each project separately)
- **Role based billing rate** (System pick billing rate of employee based on role wise billing rate defined for each project separately)
- **Task based billing rate** (System pick billing rate of time entry which is defined in task's billing rate)

### 3. Employee Attendance

1. Punch in / punch out
2. Leave records (sick leave, casual leave etc)

### 4. Expense Entry

- Multi currency expense entry tracking with currency conversion.
- Defining of exchange rate history for each currency.
- Tax calculation with customizable formulas.
- Expense reimbursement management and tracking.

### 5. Task Management

1. Project manager, team leads, employee can create tasks for their project and can assign those tasks to multiple users. And then whole team which is assigned in that particular task can do these task management activities.
  - can add their own comments.
  - can attach files at task level
  - can change status

## 6. **Project Management Tool**

## 7. **Overtime hours tracking:**

1. Billing manager can define separate billing rate for different type of work type like overtime, travel etc. Employee can enter time entry for different work types like standard, overtime etc in time entry.

## 8. **Reporting**

1. Timesheet reports for time sheet and time billing.
2. Expense report for expense reporting to client.
3. Attendance reports with yearly leave days summaries.

## **What you can do in TimeLive?**

**TimeLive Timesheet Suite** is integrated suite for managing project life cycle including projects, tasks, timesheet, expense and attendance etc.

## **TimeLive tools:**

These are the top level tools of TimeLive timesheet suite:

### 1. **Employee Timesheet Management**

1. Time entry using two format: Daily and weekly
2. Timesheet and expense approval (customizable timesheet approval path by defining work-flow path)
3. Allow external users (client) to approve their own project timesheet entered by employees.

### 2. **Billing management**

Three different types of billing rate types configurable at project level. Billing rate can be define with its applicable date range with complete history. Timesheet then pick billing rate based on time entry date from billing rate history defined at employee level, project role level or project employee level.

Different billing rate options:

- **Employee own billing rate** (System should pick employee own billing rate)
- **Project based employee billing rate** (System pick employee billing rate defined for each project separately)
- **Role based billing rate** (System pick billing rate of employee based on role wise billing rate defined for each project separately)
- **Task based billing rate** (System pick billing rate of time entry which is defined in task's billing rate)

### 3. **Employee Attendance**

1. Punch in / punch out
2. Leave records (sick leave, casual leave etc)

### 4. **Expense Entry**

- Multi currency expense entry tracking with currency conversion.
- Defining of exchange rate history for each currency.
- Tax calculation with customizable formulas.

- Expense reimbursement management and tracking.

#### 5. **Task Management**

1. Project manager, team leads, employee can create tasks for their project and can assign those tasks to multiple users. And then whole team which is assigned in that particular task can do these task management activities.
  - can add their own comments.
  - can attach files at task level
  - can change status

#### 6. **Project Management Tool**

#### 7. **Overtime hours tracking:**

1. Billing manager can define separate billing rate for different type of work type like overtime, travel etc. Employee can enter time entry for different work types like standard, overtime etc in time entry.

#### 8. **Reporting**

1. Timesheet reports for time sheet and time billing.
2. Expense report for expense reporting to client.
3. Attendance reports with yearly leave days summaries.

### **Launching TimeLive (First Time):**

Before starting TimeLive, Administrator should create a new TimeLive account. TimeLive can be launch using two way.

1. By double clicking on TimeLive shortcut on server desktop.
2. Or by typing whole URL of TimeLive URL in your web browser. URL can be enter using these different way:
  - <http://servername/TimeLive> or
  - <http://server-ip-address/TimeLive>

### **Creating new TimeLive Account:**

### **Creating TimeLive Account:**

Before starting TimeLive, Administrator should create a new TimeLive account. If TimeLive is being launched for the first time, it will automatically redirect to account add form where System Administrator can create new TimeLive Account.

### **Account Information:**

There are two types of information which are required to be entered on new account Add Form. First, organization information and second is personal along with login information of TimeLive System Administrator. After sign up, Administrator receive a notification email containing Login Email / Password of TimeLive account.

**TIMELIVE**

Provide Your Information

Account Information (Organization Information)

\* Organization Information:

Address1:

Address2:

Zipcode:

State / Province:

City:

\* Country: United States

Telephone:

Fax:

Default Currency: US\$

User Interface Language: English (United States)

Time Zone: (-7.00) Mountain Time (US & Canada)

Login Information:

\* Email Address:  \* This Email Address will be [Administrator] login name.

\* Password:

\* Verify:

\* First Name:

Middle Name:

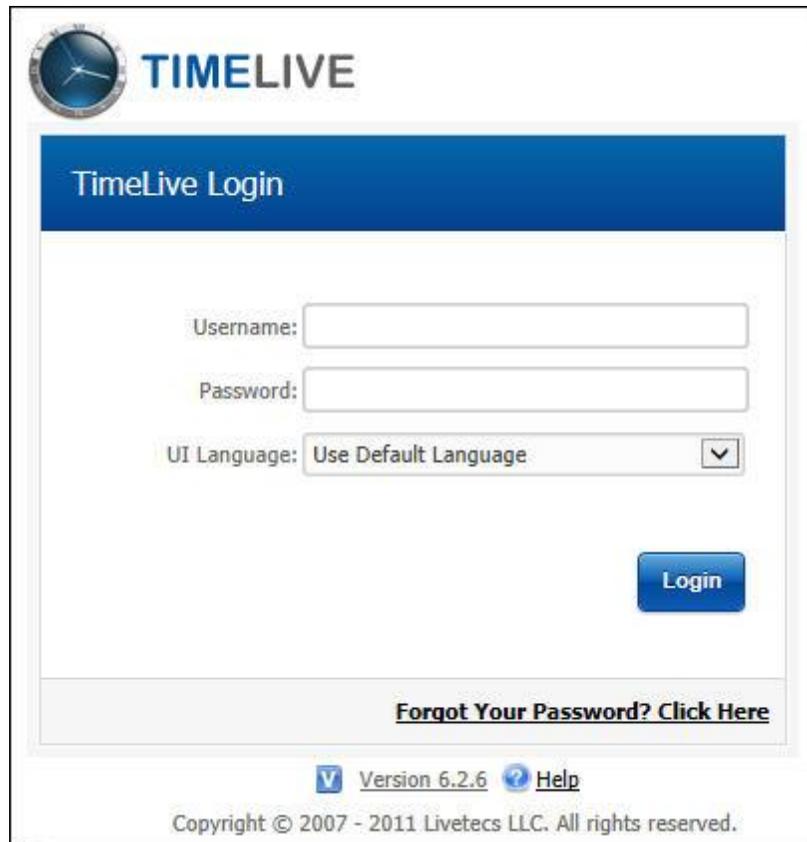
\* Last Name:

## First time login in TimeLive:

After new Account Add, system administrator can login in TimeLive system using login email and password.

## Steps of login:

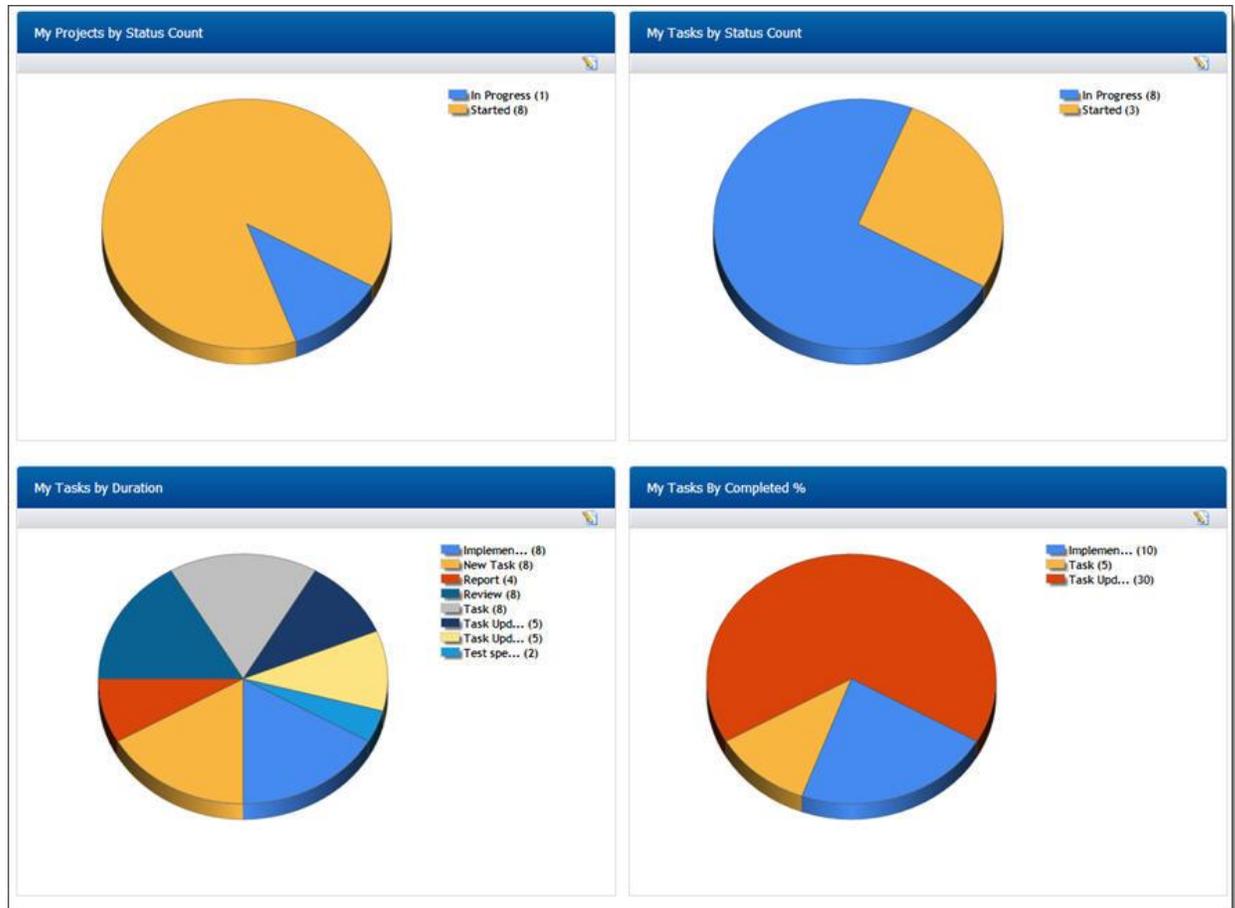
1. Enter your **Login Email address**
2. Enter your **password**
3. Select UI (User Interface) Language according to your preference
4. Click on **Login** button to login in the TimeLive Application



The image shows the TimeLive login interface. At the top left is the TimeLive logo, which consists of a circular icon with a clock face and the word "TIMELIVE" in a bold, blue, sans-serif font. Below the logo is a blue header bar with the text "TimeLive Login" in white. The main content area is white and contains three input fields: "Username:" followed by a text box, "Password:" followed by a text box, and "UI Language:" followed by a dropdown menu currently showing "Use Default Language". To the right of the input fields is a blue "Login" button. Below the input fields is a grey bar with the text "[Forgot Your Password? Click Here](#)". At the bottom of the page, there is a version number "Version 6.2.6" and a "Help" link, both preceded by small icons. The footer text reads "Copyright © 2007 - 2011 Livetecs LLC. All rights reserved."

5. On successful login, user will get access to home page.

**TimeLive Dashboard is by default set as home page:**



## Using Menus:

You can use the TimeLive left side menu bar at the left of the page and top menus to navigate through the application based on the type of work you are doing. Each item is only available to a user if they have been given access to the features within that menu, based on their role based permissions.

Contact your system administrator if you do not know your organization's TimeLive URL. This URL is dependent upon your server type and name, and the server's port number.

Those using the ASP (hosted) implementation can access TimeLive through the Employee Login section of

<http://www.livetecs.com>.

To ensure full functionality of the application, you should allow pop-ups for the TimeLive website.

## Types of Menus:

There are three types of menus and options available in TimeLive:

### 1. Top navigation menu:

- My Area
- Tasks
- Projects
- Timesheet
- Expenses
- Reports

## 2. Left hand side navigation menus (hierarchy)

- **Home**

- **My Area** (My area options include all employees own daily routine options like adding tasks, timesheet entry, expense entry, profile, personal reports etc)
  - **My Tasks** (To add and list of employee own task. Employee can then search other employee task also using this page)
  - **My Profile** (To change profile, password and other personal information)
  - **My Projects** (Show only those projects in which you are assigned)
  - **My Timesheet** (Show daily timesheet of a employee. You can switch week view of timesheet by clicking on WeekView of timesheet)
  - **My Expense Entries** (Show daily expense entries. It allow allow to add new expense entry records)
  - **My Reports** (Show main reporting page)
- **Project Management** (Project management area includes different project management pages like approval of timesheet and expenses)
  - **Timesheet Approval** (Timesheet approval page)
  - **Expense Approval** (expense approval page)
- **Administration** (All system administration options)
  - **Admin options** (This page will launch main administration page). Admin options further have these sub options to manage and configure TimeSheet solution.
    - **Organization Setup**
      - **Locations** (To manage locations (branches) of your organization.)
      - **Departments** (To manage departments of your organization)
      - **Roles** (To manage organization roles of your organization)
      - **Working Days** (Setting up working days in your organization)
      - **Task Type** (Setting and customizing task types)
      - **Priorities** (setting and customizing priorities of tasks)
      - **Role based permission** (setting of access rules of application features on application roles)
    - **Timesheet / Project / Billing Setup**
      - **Billing types** (billing types setup)
      - **Absence types** (configure types of absence in your organization)
      - **Project types** (configure types of project in your organization)
      - **Preferences** (Timesheet, organization, billing, internationalization preferences)
      - **External Users** (Configuring external users through which you can allow client to approve their own project timesheet using TimeLive system).
      - **External Users** (Configuring external users through which you can allow client to approve their own project timesheet using TimeLive system)
    - **Expenses Setup**
      - **Expense Types** (configure types of expenses)
      - **Expenses** (configure expense code as per your organization needs)
      - **Currencies** (configure currencies and exchange rates)
      - **Tax Code** (configure tax code and their calculation formulas)

- **Payment Method** (configure payment method and define your own custom payment method)
- **Archive**
  - **Time Entry Archive** (Archive of all timesheet records)
  - **Expense Entry Archive** (Archive of all expense entry records)
- **Import / Export**
  - **Import / Export (CSV)** (Importing and exporting of all types of TimeLive data to CSV files)
- **Clients** (To manage clients of your organization)
- **Employees** (To manage employees of your organization)
- **Projects** (To manage projects of your organization)

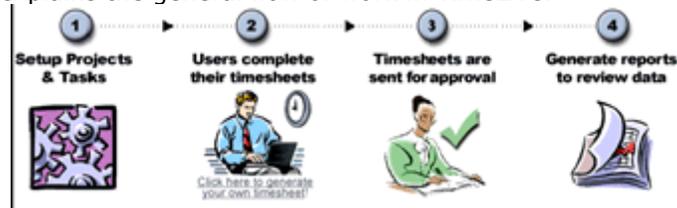
If you have problems accessing Web TimeSheet from outside your network, contact your system administrator.

## Quick Basic Setup

In order to prepare Timesheet solution for time entry, expense entry, task management, administrator should follow these setup steps in sequence.

## Understanding the Workflow:

The following diagram explains the general flow of work in TimeLive.



1. Create projects and tasks and assign project teams, rates and billing options to allow users to enter billable and non-billable time and expenses. You will be able to track all time and expenses to calculate project costs and ensure accurate client billing.
2. Create generalized tasks with **[All Employee Task]** and **[All Project Task]** checked. Generalized tasks doesn't require any assignment. Generalized tasks appear for all projects in time entry.
3. Employee complete their timesheets by entering time against projects or time off codes. Users can enter time only for those tasks for which they are part of the task team. All time is either billable or non-billable. Once completed, users submit their timesheets for approval.
4. Once submitted, users' timesheets are sent to the appropriate project leaders, clients, and supervisors for approval. Approvers can approve or reject the timesheets. Approved timesheets are closed so the data can be processed.
5. Any user with report access can generate reports to review data in the system including project status, timesheet status, billing, time off, and utilization.

## How to perform quick setup steps:

Following are 4 steps process which will allow you to get started using TimeLive. For more detail information for each of the setup, click on their corresponding link to open its detail help.

**1. Creating employees:** ([Click to launch detail help of adding Employees](#))

- After creating of employee record by administrator, employees can login in TimeLive and can do their activities

**2. Creating of Clients:** ([Click to launch detail help of adding Clients](#))

- Timesheet setup required project setup before performing any thing in TimeLive.
- For creating project, client of those projects should be created first.

**3. Creating of Projects:** ([Click to launch detail help of adding Clients](#))

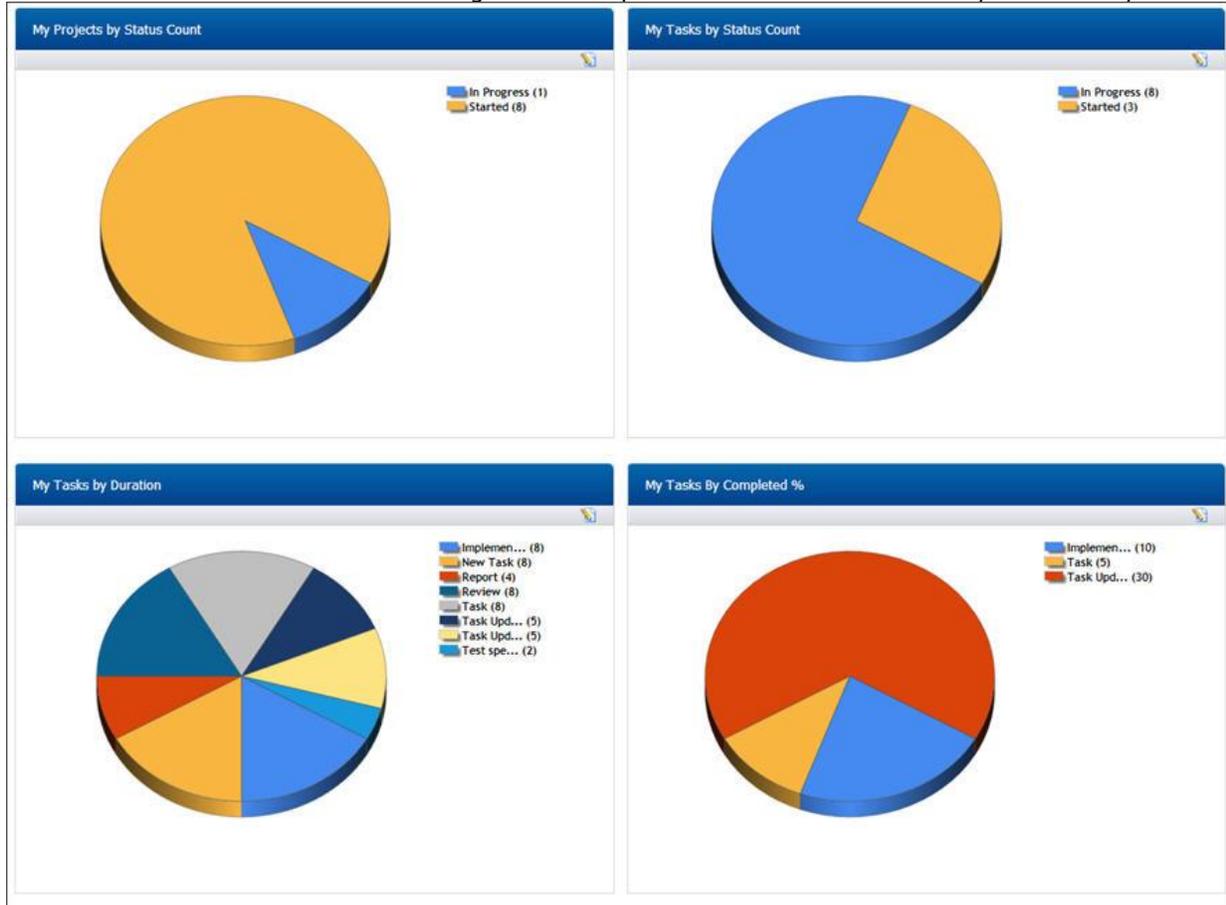
- Time entry and expense entry can only be entered for a project tasks.
- So you must have project setup before adding any task for your projects.
- You should also assign your project team in order to allow your team to enter time entry record of a particular project.

**4. Creating of Tasks:** ([Click to launch detail help of adding Clients](#))

- You can add tasks in your project and you can assign those tasks to employee.
- Only tasks which are assigned to an employee will be appear in time entry page for entering time entry record

### Dashboard Settings

A dashboard is a user interface that organizes and presents information in a way that is easy to read.



User can customize and select the data / graphs to be appeared on the Dashboard using Dashboard Settings. To customize, click on Dashboard Settings at right top of the screen. It will give the user ability to select or deselect the data / graphs appears on Dashboard.

| My Settings                             |  |
|---|--|
| Dashboard                               |  |
| Available                               | Selected                               |
| My Project Task by Status Count (Chart) | My Task List                           |
| My Due Timesheets                       | My Project Task By Completed % (Chart) |
| My Projects                             | My Project Task by Duration (Chart)    |
|   | My Reported Tasks                      |
|   | My Task Summary                        |
|   | My Open Timesheet Periods              |
|   | My Project by Status Count (Chart)     |

Update Cancel

Make your required changes and click on Update.





# Timesheet Setup

## Client Setup:

## About Client:

Clients are customers of your organization to whom you bill time or costs for projects. Clients can be external customers or departments within your organization. You should define your clients before setting up projects to eliminate the need to go back and assign the projects to the appropriate client. System administrator can setup clients using [Left hand side menu] --> [Clients] (under Administration)

| Client List          |  |                             |                      |                      |                      |                      |                      |                      |                      |                          |
|----------------------|--|-----------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|--------------------------|
| <input type="text"/> | <input type="text"/>                         | <input type="text"/>        | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>     |
| <input type="text"/> | Client Name                                  | Email Address               | Country              | Telephone1           | Edit                 | Delete               | Contacts             | Departments          |                      | <input type="checkbox"/> |
| 56                   | Bahria Society of Professional Communication |                             | Canada               |                      |                      |                      | Contacts             | Departments          |                      | <input type="checkbox"/> |
| 27                   | Barth Gross Electric Company Inc             | info@barthgross.com         | United States        | +1 (212) 929-0446    |                      |                      | Contacts             | Departments          |                      | <input type="checkbox"/> |
| 37                   | Clutch Design Inc.                           | info@clutchdesign.com       | United States        | +1 (310) 899-0522    |                      |                      | Contacts             | Departments          |                      | <input type="checkbox"/> |
| 38                   | Clydesdale International                     | info@clydesdale.com         | United States        |                      |                      |                      | Contacts             | Departments          |                      | <input type="checkbox"/> |
| 58                   | Completed                                    |                             | Canada               |                      |                      |                      | Contacts             | Departments          |                      | <input type="checkbox"/> |
| 42                   | Crestwood Technology Group                   | sales@ctgnow.com            | United States        | +1 (914) 779-3500    |                      |                      | Contacts             | Departments          |                      | <input type="checkbox"/> |
| 39                   | DBS Quality Management                       | info@dbsequalitymgmt.com    | United States        | +1 (215) 368-6266    |                      |                      | Contacts             | Departments          |                      | <input type="checkbox"/> |
| 35                   | Fair View Counseling Center                  | info@fairviewcounseling.com | United States        |                      |                      |                      | Contacts             | Departments          |                      | <input type="checkbox"/> |
| 57                   | John Smith                                   |                             | Canada               |                      |                      |                      | Contacts             | Departments          |                      | <input type="checkbox"/> |
| 41                   | M L Entertainment                            | info@mleentertainment.com   | United States        | +1 (904) 269-9600    |                      |                      | Contacts             | Departments          |                      | <input type="checkbox"/> |

1 / 2

## [Client Setup](#)

**Add Client**

Clients

\*Client Name:

\*Client Nick:

E-Mail Address:

Address1:

Address2:

Country: Canada

State:

City:

ZipCode:

Telephone1:

Telephone2:

Fax:

Default Billing Rate:

Website:

Notes:

## Client Information fields:

These are the fields which are required to be input for adding new client in TimeLive system.

- Client Name
- Client Nick (short name of client)
- Email Address
- Address
- Country
- State
- City
- Zip Code
- Telephone
- Fax
- Default Currency (for billing purpose)
- Default billing rate
- Website
- Notes

## Adding new Client:

To add new client, follow these instructions.

1. Enter client information in **[client information form]**.

2. Click on **[Add]** to add this client.

## Deleting Client:

1. In **[Client List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **[Yes]** on delete confirmation dialog

## Editing Client:

1. In **[Client List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Client Information]** form.
3. Click on **[Update]** button to update this record.

## Project Setup:

A project is a framework (structure) used to organize work-group tasks. Projects identify the body of work to be completed by a team within your organization. Projects can have multiple levels and complexities, depending on the needs of your organization.

## How Project Work:

The TimeLive allows you to define projects to enter time and expenses against, as follows:

1. A project manager adds a project to TimeLive, specifying the client the project is being completed for, if applicable.
2. The project manager specifies who will be working on the project.
3. If the project is being billed to a client, the project manager sets the billing rates for the project.
4. The project manager creates tasks within the project and enters estimates.
5. The project manager specifies which expenses can be claimed under the project.
6. When entering time on their timesheet, users working on the project allocate their time against the project and task. Users also select the project when entering expenses.
7. The costs and billing charges associated with the time and expenses are automatically calculated by the system.
8. Time and expenses can be exported for client billing. Additionally, the project manager can periodically review the actual costs against the estimates, to ensure the project is on track.

Management of Projects is located under (<Left Navigation Menu>--><Administration>--><Projects>).

The system allows you to create an unlimited number of projects for users to log their time, expenses, and mileage against. The system uses a hierarchical tasks structure and allows unlimited levels of tasks under any parent project. The main Project screen serves as the master control panel for all project creation, modification, and deletion.

## Working with Projects List Page

The Projects page provides a list of projects defined within TimeLive. Projects can be added, edited, or deleted from this page.

The Project setup is divided into the following sections:

- Project Information
- Team Lead / project manager information
- Billing type / billing rates
- Project Team

Search

**Project List**

| Id | Code      | Project Name                   | Client Code | Start Date | Status      | Edit | Delete |       |       |      |            |            |  |                          |  |
|----|-----------|--------------------------------|-------------|------------|-------------|------|--------|-------|-------|------|------------|------------|--|--------------------------|--|
| 16 | AB        | Agent Bank                     | FVCC        | 11/16/2012 | Started     |      |        | Gantt | Tasks | Team | Milestones | Attachment |  | <input type="checkbox"/> |  |
| 15 | CAC       | caCORE 3.1                     | BGE         | 10/31/2012 | Started     |      |        | Gantt | Tasks | Team | Milestones | Attachment |  | <input type="checkbox"/> |  |
| 18 | CLUTCH    | ClutchDesign.com website       | CLUTCH      | 10/29/2012 | Started     |      |        | Gantt | Tasks | Team | Milestones | Attachment |  | <input type="checkbox"/> |  |
| 22 | DMAC      | DMAC Reservation System        | PSP         | 10/29/2012 | Started     |      |        | Gantt | Tasks | Team | Milestones | Attachment |  | <input type="checkbox"/> |  |
| 20 | GASP      | GASP                           | ML          | 10/29/2012 | In Progress |      |        | Gantt | Tasks | Team | Milestones | Attachment |  | <input type="checkbox"/> |  |
| 24 | LEGO      | LEGO                           | TAI         | 10/29/2012 | OnHold      |      |        | Gantt | Tasks | Team | Milestones | Attachment |  | <input type="checkbox"/> |  |
| 21 | OASIS V2+ | OASIS V2+                      | PSP         | 10/29/2012 | Started     |      |        | Gantt | Tasks | Team | Milestones | Attachment |  | <input type="checkbox"/> |  |
| 17 | OPM       | OPMcreator                     | CREST       | 10/29/2012 | Completed   |      |        | Gantt | Tasks | Team | Milestones | Attachment |  | <input type="checkbox"/> |  |
| 23 | REFINDE   | Refined Space Customer Service | RS          | 10/29/2012 | Started     |      |        | Gantt | Tasks | Team | Milestones | Attachment |  | <input type="checkbox"/> |  |
| 94 | AB        | Refined Space Customer Service | CLYDES      | 5/30/2013  | Started     |      |        | Gantt | Tasks | Team | Milestones | Attachment |  | <input type="checkbox"/> |  |

1 2

Add Delete Selected

## Project Fields:

- Project Template allows user to add Predefined Project Template for this Project (See [Project Template](#)).
- Project Type (you can add / remove project types from admin options --> [Project Types](#))
- Client
- Project Billing Type (Per hour / fixed bid etc). You can add / remove new billing type from admin options --> [Billing types](#).)
- Project Code (short project code)
- Project Name
- Project Description
- Start Date
- Deadline
- Project "Team Lead"
- Project "Project Manager"
- Timesheet Approval Path (Approval path of timesheet and expense entries)
- Expense Approval Path (Approval path of expense entry)
- Default billing rate / per hour of employees
- Project billing rate type (Four types of billing rate options)
  1. **(Use employee own billing rate)** Billing rate should be picked from employee own billing rate
  2. **(Use project roles billing rate)** Billing rate should be picked from role wise billing rate of that project.
  3. **(Use project based employee billing rate)** Billing rate should be picked from project based employee's billing rate)
  4. **(Use task based employee billing rate)** Billing rate should be picked from billing rate defined for every separate task)

## Adding new Project:

One of the first actions that should be performed on any new installation of TimeLive is the creation of the various projects that your organization will be using for time, expense and task management. To add new project, follow these instructions.

1. Enter project information in client project form.
2. Click on **[Add]** to add this project.

## Deleting Project:

1. In **[Project List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **"Yes"** on delete confirmation dialog

## Editing Project:

1. In **[Project List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in [Client Information] form.
3. Click on **[Update]** button to update this record.

## Editing Project Team

- On project add, TimeLive automatically redirect to project team page where administrator can select employees which he wants to be in this particular project team.
- To edit project team, click on edit project link of project whose team you want to modify and then click on "Project Employees" button to open project team page

| Employee Name   | Department Name   | Location         |                                     |
|-----------------|-------------------|------------------|-------------------------------------|
| Bob Bingham     | Development       | US (Head Office) | <input checked="" type="checkbox"/> |
| Bob Foppiano    | Development       | US (Head Office) | <input type="checkbox"/>            |
| Brian Gardiner  | Development       | US (Head Office) | <input type="checkbox"/>            |
| Bryan Barton    | Development       | Canadian Branch  | <input checked="" type="checkbox"/> |
| Darrell Packard |                   |                  | <input type="checkbox"/>            |
| Jackie Alves    | Development       | US (Head Office) | <input checked="" type="checkbox"/> |
| John Benson     | Administration    | US (Head Office) | <input type="checkbox"/>            |
| John Ramos      | Development       | US (Head Office) | <input type="checkbox"/>            |
| Michael Becker  | Quality Assurance | Canadian Branch  | <input checked="" type="checkbox"/> |
| Mike Boltz      | Development       | US (Head Office) | <input type="checkbox"/>            |
| Rich Jackson    | Quality Assurance | US (Head Office) | <input type="checkbox"/>            |
| Ryan Culver     | Development       | US (Head Office) | <input type="checkbox"/>            |
| Steve Ellsworth | Development       | Canadian Branch  | <input checked="" type="checkbox"/> |
| test test       | Administration    | Canadian Branch  | <input type="checkbox"/>            |

**Adding Task into the Project:** Please see [Task Setup](#).

## Task Setup

Projects can contain many tasks and up to ten hierarchical levels. Every employee who is assigned to a project can create task of that particular project. Administrator can customize task add permission using **[Role Permission]** option available in admin options.

## More about task:

1. Task is the main source of project time sheet. Time entry can only be entered for a task of any project. **[Administrator]** should create projects and define project manager and team lead of projects.
2. **[Administrator]** or **[Project Manager]** or **[Team Lead]** can then define "Project Team".
3. **[Project Manager]** and **[Team Lead]** then can create project tasks and assign them to project team in order to allow employees to enter time entry for that task.
4. Only user who is part of project team can add new task in a project.
5. A task can be created using **[All Employee Task]** checked. All employee tasks appear in time entry of all team members of project.
6. A task can be created using **[All Project Task]** checked. All project task appear in time entry of all projects.
7. A task can be created using both **[All Employee Task]** and **[All Project Task]** checked. Those task then will be appeared for all projects and in all employees time entry.
8. Every task has their own status, priority, completed %, completed fields to monitor task progress for team collaboration purpose.
9. Every task has two fields Estimated Cost and Estimated Time spent for budgeting purpose.
10. Project manager can categorize their project tasks in different milestones (phases) for easier monitoring of individual milestones (phases) and then at project at root level.

## Task Fields:

Tasks are divided into three sections

### 1. Task Information

- Project
- Parent task (parent task if you want add this task under a parent task)
- Milestone
- Task Name
- Task Description
- Task Type (category of task. It depends upon usage to usage of TimeLive in different environments. Administrator can create new task types as per their organization needs from Admin options --> task types).
- Duration
- Completed %
- Deadline
- Task Status
- Priority
- All Employee task (Check this field, if you want this task to be appeared in time entry of all employee. General routine tasks for which you don't want to add in all projects.)
- All Project Task (Check this field, if you want this task to be appeared in time entry of all projects. General routine tasks for which you don't want to add in all project).
- Parent task (check this field, if you want this field to be add as parent field. This field will then come in parent task dropdown during task add)

### 2. Assign To

- Select employees which you want to be assigned in this task. Employee assigned in task will only enter time entry of a task. Assign to is not require if a task is defined as **[All Employee Task]**.

### 3. Estimates

- Estimated Cost
- Estimated Time spent

## List of Task (two options)

Task can be viewed these four different option.

**1. My Task** (Only task which are assigned to logged in employee)

Search

Mass Update

**My Task List**

| Id  | Task Code    | Task Name                 | Project Code | Client Name     | Task Type | Assigned By | Assigned To   | Due Date  | Status        | Priority | Milestone |                          |
|-----|--------------|---------------------------|--------------|-----------------|-----------|-------------|---------------|-----------|---------------|----------|-----------|--------------------------|
| 375 | ProjectMan.. | Project plan              | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 4/26/2013 | In Prog., 30% | Urgent   | Phase I   | <input type="checkbox"/> |
| 377 | ProjectMan.. | Project meetings          | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 4/26/2013 | In Prog., 50% | Urgent   | Phase I   | <input type="checkbox"/> |
| 379 | ProjectMan.. | Project plan presentation | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 4/26/2013 | Started 0%    | Urgent   | Phase I   | <input type="checkbox"/> |
| 380 | ProjectMan.. | Requirement Specification | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 4/26/2013 | Started 0%    | Urgent   | Phase I   | <input type="checkbox"/> |
| 382 | Implementa.. | Robot assembly            | LEGO         | Team Alliance.. | Task      | John Benson | John Benson.. | 4/26/2013 | OnHold 80%    | Urgent   | Phase I   | <input type="checkbox"/> |
| 384 | Implementa.. | Implementing Epidemic R.. | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 4/26/2013 | Started 0%    | Urgent   | Phase I   | <input type="checkbox"/> |
| 385 | Implementa.. | Implementing Epidemic r.. | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 4/26/2013 | Started 0%    | Urgent   | Phase I   | <input type="checkbox"/> |
| 390 | Presentati.. | Report                    | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 4/26/2013 | Started 0%    | Urgent   | Phase I   | <input type="checkbox"/> |
| 485 |              | New Task                  | LEGO         | Team Alliance.. | Bug       | John Benson | John Benson   | 5/30/2013 | Started 0%    | Urgent   | Phase I   | <input type="checkbox"/> |

Add

**Add Task**

Project Task

\* Project: ClutchDesign.com website

Parent Task: <RootLevel>

\* Milestone: Planning (Design) Elaboration Phase

Task Code:

\* Task Name:

\* Task Description:

\* Task Type: Bug

Priority: Urgent

Due Date: 5/30/2013

Parent Task:

All Employee Task:

All Project Task:

Assign To: Bob Bingham, John Benson, John Ramos, Mike Boltz

Task Status

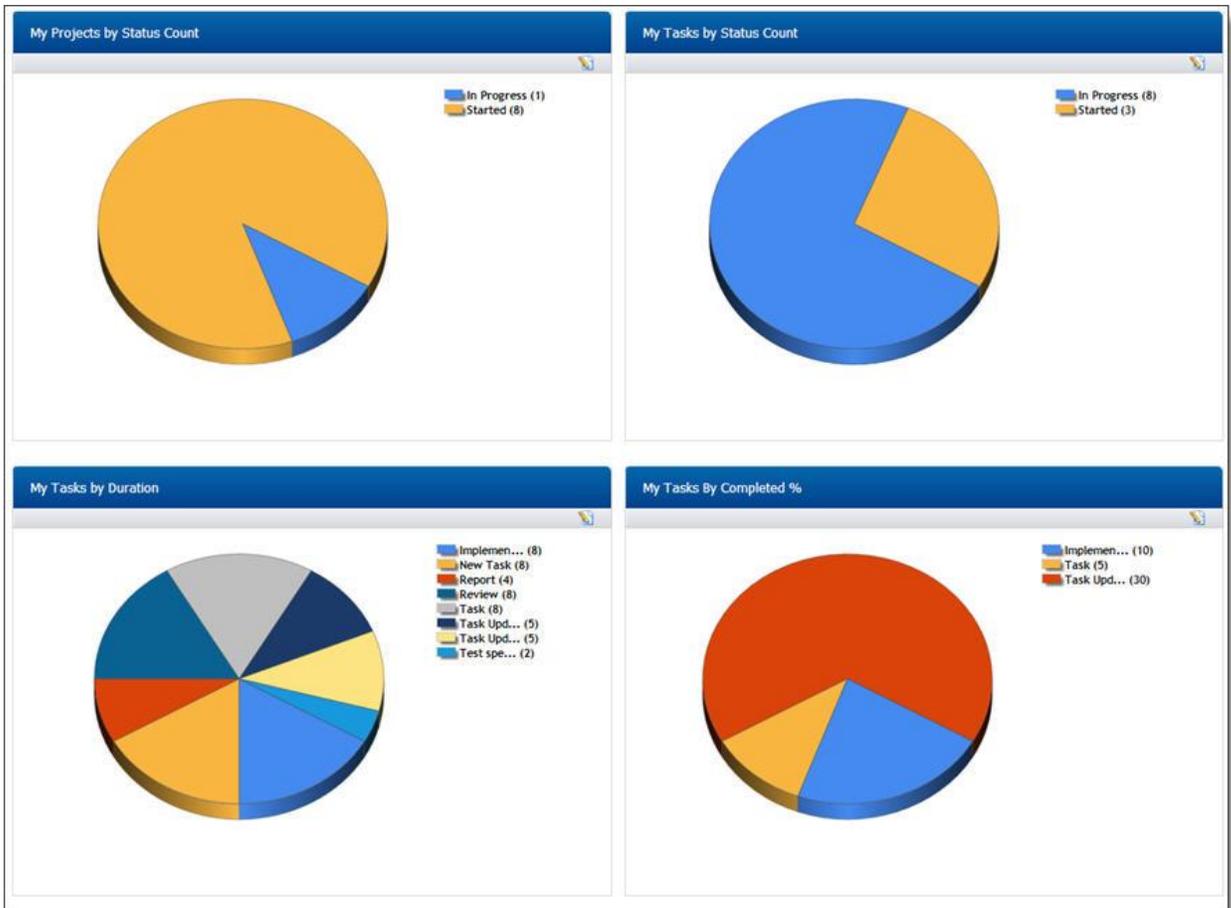
Task Estimates

Task Billing Rate

Task Attachment

Add Cancel

**1. My Area** (Task that are either assigned to logged in employee or task which are reported by logged in employee)



1. **Project --> Tasks** (Hierarchical view of all task for administration purpose). Administrator can add, edit and delete any task from there.

| Project Task List |              |   |              |            |           |         |          |            |  |
|-------------------|--------------|---|--------------|------------|-----------|---------|----------|------------|--|
| Id                | Task Code    | Task Name   | Assigned By  | Start Date | Due Date  | Status  | Priority |            |  |
| 250               | 250          | <u>User Requirements for OFA Phase I</u>  | Bob Bingham  | 4/28/2013  | 6/18/2013 | Started | Urgent   | Attachment |  |
| 252               | Requirements | Review budget processes with Budget Office  | Bob Bingham  | 5/15/2013  | 6/5/2013  | Started | Urgent   | Attachment |  |
| 251               | Requirements | Determine Budget Office Phase I highest priority requirements                                   | Bob Bingham  | 4/28/2013  | 6/18/2013 | Started | High     | Attachment |  |
| 253               | 253          | <u>Design of OFA Phase I</u>  | Bob Bingham  | 4/30/2013  | 6/20/2013 | Started | Urgent   | Attachment |  |
| 479               | bnt          | mgnkj   | Bryan Barton | 5/9/2013   | 5/30/2013 | Started | Urgent   | Attachment |  |
| 480               | bnt          | mgnkj   | Bryan Barton | 5/9/2013   | 5/30/2013 | Started | Urgent   | Attachment |  |
| 481               | bnt          | mgnkj   | Bryan Barton | 5/9/2013   | 5/30/2013 | Started | Urgent   | Attachment |  |
| 254               | Design       | 11.1 Design program to load ledger hierarchies and place accounts                               | Bob Bingham  | 4/30/2013  | 6/20/2013 | Started | Urgent   | Attachment |  |
| 255               | Design       | 11.2 Design changes for Online Budget Request system to include account code, object code, year | Bob Bingham  | 4/30/2013  | 6/20/2013 | Started | Urgent   | Attachment |  |
| 256               | 256          | <u>Implementation of OFA Phase I in test environment (Ajax)</u>                                 | Bob Bingham  | 4/30/2013  | 6/20/2013 | Started | Urgent   | Attachment |  |

1 2

Add

The screenshot shows a web-based form for adding a task. The form is titled "Add Task" and "Project Task". It includes the following fields and controls:

- Project:** A dropdown menu with "ClutchDesign.com website" selected.
- Parent Task:** A dropdown menu with "<RootLevel>" selected.
- Milestone:** A dropdown menu with "Planning (Design) Elaboration Phase" selected.
- Task Code:** An empty text input field.
- Task Name:** An empty text input field.
- Task Description:** A large empty text area.
- Task Type:** A dropdown menu with "Bug" selected.
- Priority:** A dropdown menu with "Urgent" selected.
- Due Date:** A date picker showing "5/30/2013".
- Parent Task:** A checkbox that is unchecked.
- All Employee Task:** A checkbox that is unchecked.
- All Project Task:** A checkbox that is unchecked.
- Assign To:** A list box containing the names "Bob Bingham", "John Benson", "John Ramos", and "Mike Boltz".

At the bottom of the form, there are two buttons: "Add" and "Cancel". Below the form, there are four expandable sections: "Task Status", "Task Estimates", "Task Billing Rate", and "Task Attachment".

1. **My Projects --> Tasks** (Hierarchical view of all task for administration purpose)

## Adding New task [Standard Employee]

Logged-in employee can add new task in TimeLive and can assign this task to any other employee. To add task:

- Click on **[My Task]**.
- Fill all task information in **[Task information Form]**.
- Click on add to add this task.
- Task will be then appear in **[My task]** of employee who is assigned to any task.
- Employee can see their own reported task from **[My Area]**

## Updating Task:

Logged-in employee can modify any task by clicking on any task in **[My task]** task list. Employee can update task title, task comments, task status, completed, completed % in task modification form.

## Adding Task Comments:

Task Comments are the history of comments from different task related users in order to communicate different issues / updates / comments for that particular task between team. Task comments cannot be deleted once it entered.

**To enter task comments:**

- Open task by clicking on task either from **[My Task]**, **[My Area]** or **[Project--Tasks]**.
- In task comment form, enter comments title and comment description.
- Click on **[Add]** to add that task comments.

The screenshot shows a web-based form for editing a project task. At the top left is an 'Audit Trail' button. Below it is a blue header 'Project Task Information' and a sub-header 'Project Task'. A 'Task Team' button is in the top right. The form contains several input fields and dropdown menus: 'Task Id' (375), 'Parent Task' (Project management), 'Project' (LEGO), 'Milestone' (Phase I), 'Task Code' (ProjectManage), 'Task Name' (Project plan), 'Task Description' (Project plan), 'Task Type' (Task), 'Duration' (6.00 Hours), 'Completed%' (30), 'Task Status' (In Progress), 'Priority' (Urgent), and 'Due Date' (4/26/2013). There are also checkboxes for 'All Employee Task', 'Completed', 'IsReOpen', 'All Project Task', 'Parent', and 'Billable'. An 'Assign To' dropdown menu is open, showing a list of names: Bryan Barton, Darrell Packard, John Benson, Mike Boltz, and Ryan Culver. At the bottom are 'Update' and 'Cancel' buttons. Below the form are expandable sections for 'Estimates', 'Comments', and 'Attachment'.

**Attaching document with any task:**

To attach document with any task:

- Open task by clicking on task either from **[My Task]**, **[My Area]** or **[Project--Tasks]**.
- In task attachment form, enter name of document which you want to attach with this task
- Click on browse button to locate your file on your local system. And click on open after selecting your desired file in file selection dialog box.
- Click on **[Add]** to attach that document.

**Working Day Types**

Working Day Type is the set of different kind of validations, configuration settings & policies which applies on Timesheet. These sets of Working Day Type can be assigned to every individual employee on Employee profile option. Administrator can create or modify Working Days Types using **[Admin Options]** --> **[Working Days]**. Each of the settings/configuration options are explained below.

| Working Day Type List |                |               |                       |                       |                          |                          |                    |   |   |
|-----------------------|----------------|---------------|-----------------------|-----------------------|--------------------------|--------------------------|--------------------|---|---|
| Working Day Type      | Week Start Day | Hours Per Day | Minimum Hours Per Day | Maximum Hours Per Day | Minimum Hours Per Period | Maximum Hours Per Period | Overdue After Days | Edit  | Delete  |
| Semi-Monthly          | Monday         | 8             | 0                     | 24                    | 0                        | 100                      | 1                  |  |  |
| Standard              | Monday         | 8             | 0                     | 24                    | 0                        | 60                       |                    |  |   |

[Add](#)

## Working Day Type Information

### Working Day Type

\*Working Day Type:

Hours Per Day:

Minimum Hours Per Day:

Maximum Hours Per Day:

Minimum Hours Per Period:

Maximum Hours Per Period:

Minimum Percentage Per Day:

Maximum Percentage Per Day:

Minimum Percentage Per Period:

Maximum Percentage Per Period:

Timesheet Overdue:  Days After Due Date (0 = On Due Date)

Lock Previous Timesheet Periods:  (0 = No Locking)

Lock Next Timesheet Periods:  (0 = No Locking)

Lock All Period Except Previous:  (0 = No Locking)

Lock All Period Except Next:  (0 = No Locking)

Lock Previous/Next Timesheets On:  Day of Month (0 = No Locking)

Timesheet Period Type:

Week Start Day:

Show Clock Start/End:

Lock All Previous Timesheets:

Lock All Next Timesheets:

Enable Balance Validation For Time Off:

| Working Day | Selected                 |
|-------------|--------------------------|
| Monday      | <input type="checkbox"/> |
| Tuesday     | <input type="checkbox"/> |
| Wednesday   | <input type="checkbox"/> |
| Thursday    | <input type="checkbox"/> |
| Friday      | <input type="checkbox"/> |
| Saturday    | <input type="checkbox"/> |
| Sunday      | <input type="checkbox"/> |

Add

Cancel

**Working Day Type Available Options.**

| Field Name                       | Description   |
|----------------------------------|---|
| Working Day Type                 | Specify the name to be called for this Working Day Type.  |
| Hours Per Day                    | A numerical value which specifies the duty hours per day for that specific Working Day Type. This value will be used to convert days into hours and hours into days.  |
| Minimum Hours Per Day            | A numerical value which specifies the minimum allowed working hours per day. System will validate the hour entered in Timesheet is not less than the minimum specified.   |
| Maximum Hours Per Day            | A numerical value which specifies the maximum allowed working hours per day. System will validate the hour entered in Timesheet does not exceeds than the maximum specified.  |
| Minimum Hours Per Period         | A numerical value which specifies the minimum allowed working hours per Period. System will validate the hour entered in Timesheet is not less than the minimum specified. [Option can be changed via Admin Option - Preferences - Timesheet Setup]                       |
| Maximum Hours Per Period         | A numerical value which specifies the maximum allowed working hours per Period. System will validate the hour entered in Timesheet does not exceed than the maximum specified. [Option can be changed via Admin Option - Preferences - Timesheet Setup]                   |
| Minimum Percentage Per Day       | A numerical value which specifies the minimum allowed working hours percentage per day. System will validate the hour entered in Timesheet is not less than the minimum specified. [Option can be changed via Admin Option - Preferences - Timesheet Setup]               |
| Maximum Percentage Per Day       | A numerical value which specifies the maximum allowed working hours percentage per day. System will validate the hour entered in Timesheet is not less than the maximum specified. [Option can be changed via Admin Option - Preferences - Timesheet Setup]               |
| Minimum Percentage Per Period    | A numerical value which specifies the minimum allowed working hours Percentage per Period. System will validate the percentage entered in Timesheet is not less than the minimum specified. [Option can be changed via Admin Option - Preferences - Timesheet Setup]      |
| Maximum Percentage Per Period    | A numerical value which specifies the Maximum allowed working hours Percentage per Period. System will validate the percentage entered in Timesheet does not exceeds than the Maximum specified. [Option can be changed via Admin Option - Preferences - Timesheet Setup] |
| Timesheet Overdue                | Option can be used to inform employee that Timesheet is pending. It can be set manually for number of days. Empty or Zero is by default on Due Date.  |
| Lock Previous Timesheet Periods  | This option is used when to restrict employees edit the previous Timesheet Periods. Empty or Zero is by default.  |
| Lock Next Timesheet Periods      | This option is used when to restrict employees edit the Next Timesheet Periods. Empty or Zero is by default.  |
| Lock All Periods Except Previous | This option is used when to allow employees to only edit the Previous Timesheet Periods. Empty or Zero is by default.   |

|  |  |
|--|--|
| Lock All Periods Except Next           | This option is used when to allow employees to only edit the Next Timesheet Periods. Empty or Zero is by default.                |
| Lock Previous/Next Timesheet On        | This option is used when to restrict employees to edit Timesheet on any specific date of the month. Empty or Zero is by default. |
| Timesheet Period Type                  | This is a drop box option used to assign employee Timesheet entry Daily/Weekly/Biweekly/Semi-Monthly/Monthly.                    |
| Week Start Day                         | This is a drop box option used to identify the 1st working day of the week.  |
| Show Clock Start/End                   | This check box allow user to enter work start and end time in Time Entry.  |
| Lock All Previous Timesheets           | It is a check-box option through which All previous Timesheets can be locked.  |
| Lock All Next Timesheets               | It is a check-box option through which All next Timesheets can be locked.  |
| Enable Balance Validation for Time Off | It is a check-box option through which user can see the Time Off balance while entering Time Off.                                |
| Working Days & Selection               | Administrator can select working days for each Working days type.  |
| Disable                                | It is a check box appear in Edit mode to allow administrator to disable specific Working Day Type.                               |

## My Tasks

### About My Tasks

[My Tasks] page provides list of all tasks assigned to logged in user. User can then change it search criteria to see other tasks also assigned to other employees. User can also add new task for assigned project and he can assign those task to my self as well as other team members of project.

- By default, **[My Tasks]** page only show uncompleted tasks which are assigned to currently logged in user.
- User can do search on other tasks also from here by clicking on **[Search]** link.
- In **[Search]** parameters, user can enter search parameters and can see other tasks also other then assigned to current user
- Clicking will launch **[Task information]** page where user can modify different task status, title, body.
- In task information page, user can also add "**Task comments**" for this task.
- In task information page, user can also **attach different relevant documents** which they want to share between project team for this task.
- User can also add new task by filling **[Add Task]** form on **[My Tasks]** page.

Search

Mass Update

### My Task List

| Id  | Task Code    | Task Name                  | Project Code | Client Name     | Task Type | Assigned By | Assigned To   | Due Date   | Status        | Priority | Milestone   |                          |
|-----|--------------|----------------------------|--------------|-----------------|-----------|-------------|---------------|------------|---------------|----------|-------------|--------------------------|
| 377 | ProjectMan.. | Task Updated -1            | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 10/14/2012 | In Prog., 30% | Urgent   | Phase I     | <input type="checkbox"/> |
| 379 | ProjectMan.. | Task Updated -1            | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 10/14/2012 | In Prog., 0%  | Urgent   | Phase I     | <input type="checkbox"/> |
| 380 | ProjectMan.. | Task Updated -1            | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 10/14/2012 | In Prog., 0%  | Urgent   | Phase I     | <input type="checkbox"/> |
| 382 | Implementa.. | Robot assembly             | LEGO         | Team Alliance.. | Task      | John Benson | John Benson.. | 10/14/2012 | In Prog., 0%  | Urgent   | Phase I     | <input type="checkbox"/> |
| 384 | Implementa.. | Implementing Epidemic R... | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 10/14/2012 | In Prog., 10% | Urgent   | Phase I     | <input type="checkbox"/> |
| 385 | Implementa.. | Implementing Epidemic r... | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 10/14/2012 | In Prog., 0%  | Urgent   | Phase I     | <input type="checkbox"/> |
| 387 | Implementa.. | Test specification and ... | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 10/14/2012 | In Prog., 0%  | Urgent   | Phase I     | <input type="checkbox"/> |
| 390 | Presentati.. | Report                     | LEGO         | Team Alliance.. | Task      | John Benson | John Benson   | 10/14/2012 | In Prog., 0%  | Urgent   | Phase I     | <input type="checkbox"/> |
| 484 |              | Task                       | 001          | Bahria Societ.. | Bug       | John Benson | John Benson   | 10/31/2012 | Started 5%    | Urgent   | Default M.. | <input type="checkbox"/> |
| 485 | J-01         | Review                     | J-001        | John Smith      | Task      | John Benson | John Benson   | 11/4/2012  | Started 0%    | Urgent   | Default M.. | <input type="checkbox"/> |

1/2

Add

### Add Task

Project Task

\*Project: 001

Parent Task: <RootLevel>

\*Milestone: Default Milestone

Task Code:

\*Task Name:

\*Task Description:

\* Task Type: Bug

Priority: Urgent

Due Date: 5/30/2013

Parent Task:

All Employee Task:

All Project Task:

Assign To: Bob Bingham, Bob Foppiano, Brian Gardiner, Bryan Barton

Task Status

Task Estimates

Task Billing Rate

Task Attachment

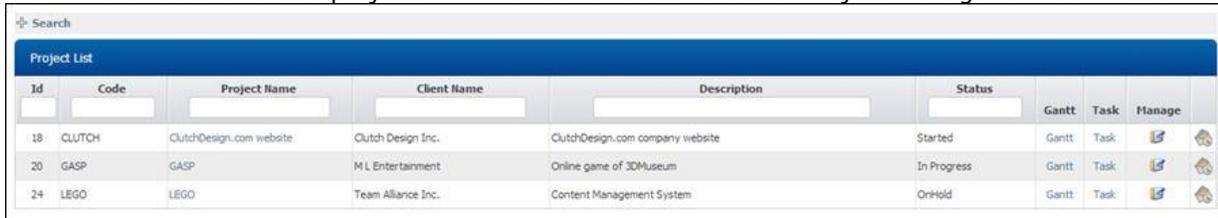
Add Cancel

## My Projects

## About [My Projects]

[My Projects] page show all projects in which current logged in user is assigned.

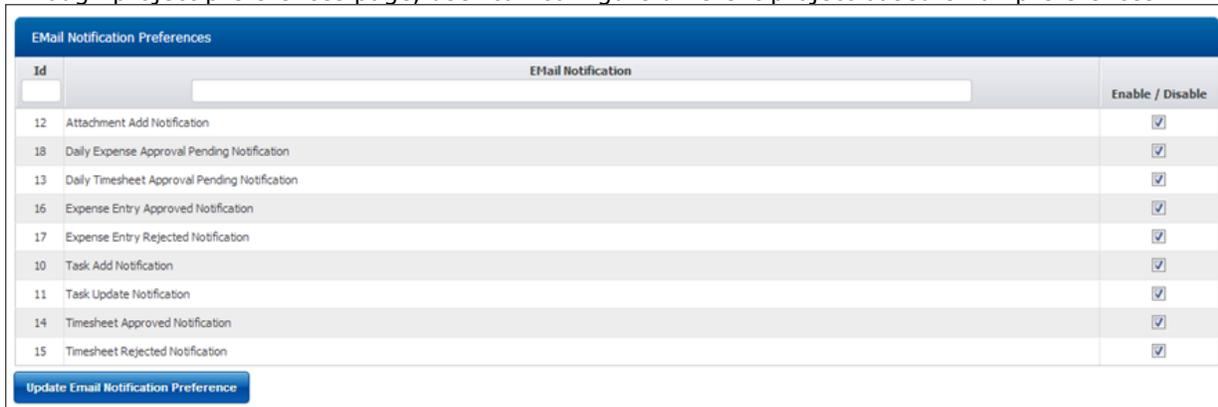
- [My Projects] page will show only those projects in which he is assigned using [Project Team] option in Project.
- User can change his own **email preferences** by clicking on [Preferences] icon.
- User can open [Tasks] page by clicking on task link. Tasks link will only be available available for projects in which current employee is either Team Lead or Project Manager.
- User can click on [Manage] icon to open [Edit Project] page. [Manage] icon will only be available for those projects in which current user is either Project Manager or Team Lead.



| Project List |        |                          |                    |                                  |             |       |      |   |
|--------------|--------|--------------------------|--------------------|----------------------------------|-------------|-------|------|---|
| Id           | Code   | Project Name             | Client Name        | Description                      | Status      | Gantt | Task | Manage  |
| 18           | CLUTCH | ClutchDesign.com website | Clutch Design Inc. | ClutchDesign.com company website | Started     | Gantt | Task |    |
| 20           | GASP   | GASP                     | M L Entertainment  | Online game of 3DMuseum          | In Progress | Gantt | Task |    |
| 24           | LEGO   | LEGO                     | Team Alliance Inc. | Content Management System        | OnHold      | Gantt | Task |    |

## Project Preferences :

Through project preferences page, user can configure different project based email preferences.



| Email Notification Preferences |   |                                     |
|--------------------------------|---|-------------------------------------|
| Id                             | Email Notification                            | Enable / Disable                    |
| 12                             | Attachment Add Notification                   | <input checked="" type="checkbox"/> |
| 18                             | Daily Expense Approval Pending Notification   | <input checked="" type="checkbox"/> |
| 13                             | Daily Timesheet Approval Pending Notification | <input checked="" type="checkbox"/> |
| 16                             | Expense Entry Approved Notification           | <input checked="" type="checkbox"/> |
| 17                             | Expense Entry Rejected Notification           | <input checked="" type="checkbox"/> |
| 10                             | Task Add Notification                         | <input checked="" type="checkbox"/> |
| 11                             | Task Update Notification                      | <input checked="" type="checkbox"/> |
| 14                             | Timesheet Approved Notification               | <input checked="" type="checkbox"/> |
| 15                             | Timesheet Rejected Notification               | <input checked="" type="checkbox"/> |

[Update Email Notification Preference](#)

## Work Type Setup

### About Work Type:

TimeLive work types implementation allow project manager and administrator to define separate billing rate and employee rate of every separate work type. Work type is something one level higher classification of time entry.

A typical case for separate billing rate for separate [work type] is

- Employee Billing Rate (Standard) : 80 per hour
- Employee Billing Rate (Overtime) : 100 per hour
- Employee Billing Rate (Travel) : 60 per hour.

### Work Type in TimeLive:

1. System administrator can define separate billing rate for each separate work type in all types of billing rate definition.

2. System Administrator can then enable **[Work Type]** field using TimeLive application preferences.
3. Employee / contractor can then select **[Work Type]** in time entry view.
4. TimeLive then pick billing rate for selected work typed defined separately in billing rate definition.

## Default Work Types in TimeLive:

TimeLive by defaults come with 3 types of **[work types]**.

1. Standard
2. Overtime
3. Travel

The screenshot shows the 'Work Type List' interface. It features a table with columns for Id, Sort Order, Work Type Code, and Work Type. Below the table is a 'Work Type Information' section with input fields for Sort Order, Work Type Code, and Work Type, along with an 'Add' button.

| Id | Sort Order | Work Type Code | Work Type | Edit | Delete |
|----|------------|----------------|-----------|------|--------|
| 1  |            | ST             | Standard  |      |        |
| 2  |            | OT             | Overtime  |      |        |
| 3  |            | TR             | Travel    |      |        |

**Work Type Information**

Working Type

Sort Order:

\* Work Type Code:

\* Work Type:

**Add**

## How to define separate employee and billing rate for different [work types]:

### 1. In [Employee Own Billing Rate]:

- Just select your required **[Work Type]** in **[Employee Form]** and then define your billing rate and employee rate for that particular work type.

The screenshot shows the 'Billing Rate' configuration form. It includes dropdown menus for Work Type, Employee Rate Currency, and Billing Rate Currency. It also has input fields for Employee Rate, Billing Rate, Billing Rate Start Date, and Billing Rate End Date.

**Billing Rate**

Work Type: Standard

Employee Rate Currency: Standard

Billing Rate Currency: US\$

Billing Rate Start Date: 11/17/2012

Billing Type: Hourly

Employee Rate: 65.0000

Billing Rate: 95.0000

Billing Rate End Date: 11/17/2013

[Billing Rate History](#)

### 2. In [Project based Employee Billing Rate]:

- Just select your required **[Work Type]** in **[Work Type]** drop-down and then define your billing rate and employee rate for that particular work type.

**Project Information**

Project Id: 19      Project Code: SHIBV2

Project Name: Shiboeth V2

Work Type: Standard

**Project Employee List**

| Employee Name   | Billing Rate Currency | Billing Rate | Employee Rate Currency | Employee Rate | Start Date | End Date  |                                     |
|-----------------|-----------------------|--------------|------------------------|---------------|------------|-----------|-------------------------------------|
| Bob Bingham     | US\$                  | 0            | US\$                   | 0             | 5/31/2013  | 5/31/2014 | <input checked="" type="checkbox"/> |
| Bob Foppiano    | US\$                  | 110.0000     | US\$                   | 95.0000       | 5/31/2013  | 5/31/2014 | <input type="checkbox"/>            |
| Brian Gardiner  | US\$                  | 80.0000      | US\$                   | 85.0000       | 5/31/2013  | 5/31/2014 | <input type="checkbox"/>            |
| Bryan Barton    | US\$                  | 85.0000      | US\$                   | 65.0000       | 5/31/2013  | 5/31/2014 | <input type="checkbox"/>            |
| Darrell Packard | US\$                  | 0            | US\$                   | 0             | 5/31/2013  | 5/31/2014 | <input type="checkbox"/>            |

### 3. In [Role based billing rate] case

- Just select your required [Work Type] in [Work Type] drop-down and then define your billing rate and employee rate for that particular work type.

**Project Information**

Project Id: 19      Project Code: SHIBV2

Project Name: Shiboeth V2

Work Type: Standard

**Project Roles**

| Role                   | Number Of Resources | Billing Rate Currency | Billing Rate | Employee Rate Currency | Employee Rate | Selected                            | Start Date | End Date  | History |
|------------------------|---------------------|-----------------------|--------------|------------------------|---------------|-------------------------------------|------------|-----------|---------|
| Administrator          | 2                   | US\$                  | 100          | US\$                   | 100           | <input checked="" type="checkbox"/> | 5/31/2013  | 5/31/2014 |         |
| Expense Entry Approver | 1                   | US\$                  | 150          | US\$                   | 25            | <input checked="" type="checkbox"/> | 5/31/2013  | 5/31/2014 |         |
| External User          | 1                   | US\$                  | 100          | US\$                   | 10            | <input checked="" type="checkbox"/> | 5/31/2013  | 5/31/2014 |         |
| Project Manager        |                     | US\$                  | 0.0000       | US\$                   | 0             | <input type="checkbox"/>            | 5/31/2013  | 5/31/2014 |         |
| Team Lead              |                     | US\$                  | 0.0000       | US\$                   | 0             | <input type="checkbox"/>            | 5/31/2013  | 5/31/2014 |         |
| Time Entry Approver    |                     | US\$                  | 0.0000       | US\$                   | 0             | <input type="checkbox"/>            | 5/31/2013  | 5/31/2014 |         |
| User                   |                     | US\$                  | 0.0000       | US\$                   | 0             | <input type="checkbox"/>            | 5/31/2013  | 5/31/2014 |         |

**Update**

### 4. In [Task Based Billing Rate] case

- Just select your required [Work Type] in [Work Type] drop-down and then define your billing rate and employee rate for that particular work type.

**Task Billing Rate**

Work Type: Standard

Employee Rate Currency: Standard

Billing Rate Currency: US\$

Billing Rate Start Date: 11/17/2012

Employee Rate: 0.0000

Billing Rate: 0.0000      Billing Rate History

Billing Rate End Date: 11/17/2013

## How to enable [Work Type] field in Time Entry [Day View] and [Week View]:

Steps:

1. Navigate to **[Admin Options]**-->**[Preferences]**
2. Click on **[Show Work Type In Timesheet]** to check this field.
3. Click on **[update]** to update these changes.

**Timesheet Information**

Show Clock Start/End:

Show Client in Timesheet:

Show Description in Week View:

Show Completed Project in Timesheet:

Show Completed Task in Timesheet:

Show Work Type in Timesheet:

Show Cost Center in Timesheet:

Show TimeOff in Timesheet:

## Time Entry Day View with [Work Type] field:

Weekly Timesheet
Timesheet Periods
Save
Start Timer

Employees: 001 - John Benson

Current Date: 5/13/2013

Time Entry Date: 5/13/2013

Timesheet Status: ■ Not Submitted

---

**Time Entry Day View**

| Project         | Project Task                  | Work Type | TotalTime | Description            |
|-----------------|-------------------------------|-----------|-----------|------------------------|
| LEGO            | Implementing Epidemic round 2 | Standard  | 02:00     | Worked on tasks        |
| LEGO            | Project plan                  | Standard  | 06:00     | Worked on project plan |
| Select Project  | Select Task                   | Standard  |           |                        |
| Select Project  | Select Task                   | Standard  |           |                        |
| <b>Time Off</b> | Holiday                       |           |           |                        |
| <b>Time Off</b> | Holiday                       |           |           |                        |
|                 |                               |           | 08:00     |                        |

Copy From: 5/31/2013 Copy Timesheet Copy Activities Save

Status Legend ■ Not Submitted ■ Submitted ■ Approved ■ Rejected

**Employee Attendance List**

| Id | In/Out | Time | Absent |
|----|--------|------|--------|
|    |        |      |        |

Add

## Time Entry Week View with [Work Type] field:

[Day View](#)
[Timesheet Periods](#)
[Save](#)
[Submit](#)
[Start Timer](#)
[Audit](#)

Employees: 001 - John Benson

Current Timesheet Period: 5/27/2013 - 6/2/2013

Time Entry Date: 5/31/2013

Timesheet Total: 08:00

Timesheet Status: Submitted

---

**Time Entry Week View**

| Project Name    | Project Task                  | Work Type | Mon<br>5/27 | Tue<br>5/28 | Wed<br>5/29 | Thu<br>5/30 | Fri<br>5/31 |
|-----------------|-------------------------------|-----------|-------------|-------------|-------------|-------------|-------------|
| LEGO            | Implementing Epidemic round 2 | Standard  | 08:00       |             |             |             |             |
| Select Project  | Select Task                   | Standard  |             |             |             |             |             |
| Select Project  | Select Task                   | Standard  |             |             |             |             |             |
| <b>Time Off</b> | Holiday                       |           |             |             |             |             |             |
| <b>Time Off</b> | Holiday                       |           |             |             |             |             |             |
|                 |                               |           | 08:00       |             |             |             |             |

Description:

Save Submit

Copy From: 5/31/2013
 [Copy Timesheet](#)
[Copy Activities](#)
[Print](#)
[Export Offline Timesheet](#)
[Import Offline Timesheet](#)

Status Legend
 ■ Not Submitted
 ■ Submitted
 ■ Approved
 ■ Rejected

# Timesheet

## Time Entry

After you have completed the setup process, users can begin entering billable and non-billable time and expenses and tracking when they start and stop work. You will be able to track project costs and client billing, timesheet submission status, time off usage, and available vacation.

This topic will explain the actions involved in daily usage of TimeLive, including:

- Entering, saving time record using time entry **day view**. Submit is only available in week view.
- Entering, saving, and submitting time record using time entry **week view**.

## More about TimeLive timesheet entry:

1. Timesheets are used to enter time against specific projects and tasks or activities and time off using either day-view or week-view.
2. Users complete and submit their timesheets from week-view to supervisors, project leaders, and/or clients for approval.
3. The timesheets are then reviewed and either approved. When all items are approved, the time information is saved to the database.
4. Once a timesheet is submitted, the data can be analyzed by project leaders and supervisors to determine project status and costs, and to make more efficient resource planning decisions.
5. Billing detail can be generated after submitting of timesheet.

## Timesheet formats:

TimeLive provides **two timesheet formats** for entering time entry record in TimeLive.

- **Standard Timesheet** (just with **total time** of a time entry record. It is useful in organization where only **TotalTime** information is required for billing and analyzing)

Weekly Timesheet Timesheet Periods Audit Save Start Timer

Employees: 001 - John Benson

Current Date: 5/30/2013

Time Entry Date: 5/30/2013

Timesheet Status: Not Submitted

**Time Entry Day View**

| Project        | Project Task | TotalTime | Description |
|----------------|--------------|-----------|-------------|
| Select Project | Select Task  |           |             |
| Select Project | Select Task  |           |             |
| Time Off       | Holiday      |           |             |
| Time Off       | Holiday      |           |             |
|                |              | 00:00     |             |

Copy From: 5/30/2013 Copy Timesheet Copy Activities Save

Status Legend: Not Submitted Submitted Approved Rejected

**Employee Attendance List**

| Id | In/Out | Time | Absent |
|----|--------|------|--------|
|    |        |      |        |

Add

- **Time entry with Start time and End time** (additional start time / end time field with standard total time field)

Weekly Timesheet Timesheet Periods Audit Save Start Timer

Employees: 001 - John Benson

Current Date: 5/30/2013

Time Entry Date: 5/30/2013

Timesheet Status: Not Submitted

**Time Entry Day View**

| Project        | Project Task                           | StartTime | EndTime | TotalTime | Description |
|----------------|--|-----------|---------|-----------|-------------|
| LEGO           | Implementing Epidemic Rounting round 1 | 09:00     | 22:00   | 14:00     |             |
| Select Project | Select Task                            |           |         |           |             |
| Time Off       | Holiday                                |           |         |           |             |
| Time Off       | Holiday                                |           |         |           |             |
|                |  |           |         | 14:00     |             |

Copy From: 5/30/2013 Copy Timesheet Copy Activities Save

Status Legend: Not Submitted Submitted Approved Rejected

**Employee Attendance List**

| Id | In/Out | Time | Absent |
|----|--------|------|--------|
|    |        |      |        |

Add

## Time Entry - Day View

### About Day View:

Using day view of time entry, employee can enter daily timesheet with full view of whole day.

Employee can submit these time entries for approval by clicking on **[Submit]** button.

Time entry day view can be access using **<My Area> -- <My Timesheet>** from main menu.

### Features of Time Entry - Day View:

1. Easy single format of entering whole day time entries for different project and task in single save.
2. Day view of time entry also supports both two types of format. You can customize this option using **Admin option --> Preferences (Show Clock Start/End]** option.
  - **Standard timesheet** (just with total time of a time entry record)

| Project        | Project Task | TotalTime | Description |
|----------------|--------------|-----------|-------------|
| Select Project | Select Task  |           |             |
| Select Project | Select Task  |           |             |
| Time Off       | Holiday      |           |             |
| Time Off       | Holiday      |           |             |
|                |              | 00:00     |             |

| Id | In/Out | Time | Absent |
|----|--------|------|--------|
|    |        |      |        |

- **Time entry with Start time and End time** (additional start time / end time field with standard total time field)

The screenshot displays the 'Time Entry Day View' for employee '001 - John Benson' on '5/30/2013'. The status is 'Not Submitted'. The main table has columns for Project, Project Task, StartTime, EndTime, TotalTime, and Description. A row is filled with 'LEGO' project, 'Implementing Epidemic Rounting round 1' task, from 08:00 to 22:00, with a total time of 14:00. Below the table are buttons for 'Copy Timesheet', 'Copy Activities', and 'Save'. A status legend shows 'Not Submitted' (yellow), 'Submitted' (blue), 'Approved' (green), and 'Rejected' (red). At the bottom, there is an 'Employee Attendance List' table with columns for Id, In/Out, Time, and Absent, and an 'Add' button.

## Adding of Time entry record using Day View:

1. By default, timelive always give two blank rows in day view to enter new timesheet record.
2. On save, timelive will give additional 2 rows for entering more time entries
3. Select project in blank row of day view
4. Select task of that selected project in that same row
5. Enter Start time (Time In / Time Out mode only)
6. Enter End time (Time In / Time Out mode only)
7. Enter Total Time

You can continue on adding new row in time entry record from next row. If you want to add more row, save it first and then timelive system will give additional 2 rows for entering more records.

## Deleting of time entry record:

1. Click on **[Delete]** button of record which you want to delete.
2. Click on **[Yes]** to confirm this delete.

## Updating time entry record:

- Navigate to field which you want to change.
- Change your content in that field.
- Click on update to save this update.

## Submitting time entry record:

- Submitting time entry can be done only from week-view. Just navigate to week-view and click on submit button to submit that whole week.

## Time Entry - Period View

### About Period View:

Using **[Period View]** of time entry, employee can enter daily time sheet with full view of whole week.

Employee can submit these time entries for approval by clicking on **[Submit]** button.

Time entry week view can be access using **<My Area> -- <My Timesheet> --> <Period View>** from main menu.

### Features of Time Entry - Period View:

1. Easy single format of entering whole week time entries for different project and task in single save.
2. Period View can be configured using **[Admin Options]**-->**[Working Days]** for following configuration.
  - Changing of period type (Daily, Weekly, Bi-Weekly, Semi-Month, Monthly) for period view.
  - Week Start Day.
  - Week working days.
  - Validation of hours for time entry (Minimum Hours / Maximum Hours per day and per period).
3. Period view of time entry also supports both two types of format (standard and with start time and end time) . You can customize this option using **Admin option --> Preferences (Show Clock Start/End]** option.
4. A client selection dropdown can also be enabled in Time Entry using Admin Options-->Preferences option name **[Show Client In Timesheet]**.
5. **Standard timesheet** (just with total time of a time entry record)

[Day View](#)
[Timesheet Periods](#)
[Save](#)
[Submit](#)
[Start Timer](#)
[Audit](#)

Employees:

Current Timesheet Period:

Time Entry Date:

Timesheet Total:

Timesheet Status: ■ Not Submitted

---

**Time Entry Week View**

| Project Name    | Project Task   | Mon<br>5/27                                    | Tue<br>5/28 | Wed<br>5/29 | Thu<br>5/30 | Fri<br>5/31 |
|-----------------|----------------|--|-------------|-------------|-------------|-------------|
| LEGO            | Robot assembly | 12:12<br><span style="color: yellow;">■</span> |             |             |             |             |
| Select Project  | Select Task    |  |             |             |             |             |
| Select Project  | Select Task    |  |             |             |             |             |
| <b>Time Off</b> | Holiday        |  |             |             |             |             |
| <b>Time Off</b> | Holiday        |  |             |             |             |             |
|                 |                | 12:12  |             |             |             |             |

Description:

[Save](#)
[Submit](#)

Copy From: 
[Copy Timesheet](#)
[Copy Activities](#)
[Print](#)
[Export Offline Timesheet](#)
[Import Offline Timesheet](#)

Status Legend: ■ Not Submitted ■ Submitted ■ Approved ■ Rejected

- Time entry with Start time and End time** (additional start time / end time field with standard total time field)

Day View
Timesheet Periods
Save
Submit
Start Timer
Audit

Employees:

Current Timesheet Period:

Time Entry Date:

Timesheet Total:

Timesheet Status: ■ Not Submitted

---

Time Entry Week View

| Project Name                                | Project Task                                | Mon<br>5/27  | Tue<br>5/28 | Wed<br>5/29 | Thu<br>5/30 | Fri<br>5/31 |
|---|---|--|-------------|-------------|-------------|-------------|
| <input type="text" value="LEGO"/>           | <input type="text" value="Robot assembly"/> | 05:00<br>08:00<br>03:00<br><span style="color: yellow;">■</span> |             |             |             |             |
| <input type="text" value="Select Project"/> | <input type="text" value="Select Task"/>    |  |             |             |             |             |
| <input type="text" value="Select Project"/> | <input type="text" value="Select Task"/>    |  |             |             |             |             |
| Time Off                                    | <input type="text" value="Holiday"/>        |  |             |             |             |             |
| Time Off                                    | <input type="text" value="Holiday"/>        |  |             |             |             |             |
|   |   | 3:00   |             |             |             |             |

Description:

Save
Submit

Copy From:

Copy Timesheet
Copy Activities
Print
Export Offline Timesheet
Import Offline Timesheet

Status Legend ■ Not Submitted ■ Submitted ■ Approved ■ Rejected

## Adding of Time entry record using Period View:

1. By default, Timelive always give two blank rows in week view to enter new timesheet record.
2. On save, Timelive will give additional 2 rows for entering more time entries
3. Select project in blank row of week view for which you want to enter time entry record.
4. Select task of that selected project in that same row
5. Enter Start time (Time In / Time Out mode only)
6. Enter End time (Time In / Time Out mode only)
7. Enter Total Time

You can continue on adding new row in time entry record from next row. If you want to add more row, save it first and then Timelive system will give additional 2 rows for entering more records.

## Deleting of time entry record:

1. Navigate to Total Time field either using mouse or using keyboard.
2. Remove information in **[Total Time]** field which is already entered.
3. Click on **[Save]** to save this delete.

## Updating time entry record:

- Navigate to field which you want to change.
- Change your content in that field.
- Click on **[update]** to save this update.

## Submitting time entry record:

- Click on **[Submit]** button to submit time entries for approvals. After submit, all time entry will become read-only for users.
- After submit, time entry show submit and approval status in bottom of week view.

## Copy Timesheet, Copy Activities, Export Offline Timesheet, Import Offline Timesheet:

In Timesheet Period View, below the Save and Submit button, there are very useful options through which lot of time can be saved.

The screenshot shows a web interface for a timesheet period. At the top, there is a 'Description:' label above a text input field containing 'LEGO Project Meetings'. Below the input field are two blue buttons: 'Save' and 'Submit'. Underneath these are several utility buttons: 'Copy From: 9/21/2015' (with a dropdown arrow and a close 'X' icon), followed by 'Copy Timesheet', 'Copy Activities', 'Print', 'Export Offline Timesheet', and 'Import Offline Timesheet'. At the bottom, there is a 'Status Legend' section with four colored squares and their corresponding labels: a yellow square for 'Not Submitted', a blue square for 'Submitted', a green square for 'Approved', and a red square for 'Rejected'.

**Copy Timesheet** : While on any Timesheet period, user can copy any existing Timesheet period by using **Copy from** Date. Through this option, all Project, Tasks and hours will be copied from given period date to current period.

**Copy Activities** : This option will copy only Project, Tasks to current Timesheet period. Hours will not be copied.

**Export Offline Timesheet** : This option will save a CSV file of the current Timesheet period on your computer.

**Import Offline Timesheet** : This option will upload saved CSV Timesheet file from computer.

## Submitting a Timesheet

When a period ends, users submit their timesheets for approval. The approval process ensures that time is entered correctly for more efficient and accurate analysis.

TimeLive automatically submits users' timesheets to all necessary supervisors, project leaders, and clients based on both the system configuration set up by the administrator and the approval type defined at project level.

Submit button is only available in Week-View of time entry.

## Submit your timesheet for approval:

- a. Click on **[My Timesheet]** link in left hand side menu.
- b. Select the **[Submit]** button.

- c. After submit, time entry records will become read-only for users. **(Administrator can disable time entry locking after submit by un-checking on preferences option "Lock Submitted Records".**
- d. After submit, time entry show submit and approval status in bottom of week view.

| Timesheet Approval Detail     |             |          |          |          |
|-------------------------------|-------------|----------|----------|----------|
| Submitted By: John Benson     |             |          |          |          |
| Submitted On: 5/30/2013       |             |          |          |          |
| Approver Name                 | Approved On | Status   | Comments | Projects |
| John Benson - Project Manager | 5/30/2013   | Approved |          | LEGO     |

## Unsubmitting and Reopening Timesheets:

TimeLive Administrator can un-submit or unapprove user's time entries using **[Time Entry Archive]** option available in **[Admin Options]**. Unsubmitting/Unapproving a single record will open whole week of time entry of that particular user. User can update his time entry by login-in using his own username and password and can update any entry in whole week. He can then re-submit this whole week for approval.

- Using **[Time Entry Archive]**, administrator can search records which he want to change using different filter options available.
- Click on **[Edit]** on record on which administrator wants to change approval or submitted flag of a time entry.
- Uncheck **[Approved]** or **[Submitted]** flag as per your requirements in that time entry row.
- Click on **[Update]** link for that time entry archive record to update this record. This will remove that same approved or submitted flag in whole week.

## Rejected Timesheets:

If a supervisor, project leader, or client rejects your timesheet, TimeLive will notify you by displaying a rejection notification in your timesheet. You can then review the approval details, correct errors, and resubmit your timesheet for approval.

## Timesheet Approval

The approval process ensures that time is entered correctly for more efficient and accurate project and time off analysis. TimeLive provides a default approval process that you may customize for your organization.

## More about Timesheet Approval:

1. If you choose to customize this process, you should change the approval settings before creating projects and allowing users to enter timesheets/expenses.
2. **Approver types** identify the individuals who will be approving users' timesheets and expenses. You can setup many different approver types, each of which will have a specific approval function within the approval path.
3. **Simultaneous / Alternate Approvals.** Multiple approvers can receive and approve the same item concurrently. For example, if you have defined two approval types named Supervisor and Administrator, you can assign them both 1st position in the approval sequence, and they will both receive approval items simultaneously.

- Users complete their timesheets by entering time against projects or time off codes. Users can enter time only for those projects for which they are part of the project team. All time is either billable or non-billable. Once completed, users submit their timesheets for approval.
- Once submitted, users' timesheets are sent to the appropriate project leaders, clients, and supervisors for approval. Approvers can approve or reject the timesheets. Approved timesheets are closed so the data can be processed.
- Timelive sends e-mail notifications (if enabled) to inform approvers when timesheets/expenses are waiting for approval, or to inform users when timesheets and expenses have been rejected.

## Launching Timesheet Approval:

To launch timesheet approval, click on **<Project Management> --> <Timesheet Approval>** option in left side navigation menu.

## Approving timesheet records:

Timesheet Approval page shows four possible timesheet approval tables depend upon logged in employee role in different project and timesheet approval path defined for those projects. These are the possible types of timesheet approval tables available in timesheet approval page.

- My Team Time Entry Approvals** (Will be showed if a project's teamlead timeentries are due to be approved)
- My Projects Time Entry Approvals** (Will be showed if a project's project manager timeentries are due to be approved)
- Client Time Entry Approvals** (Will be showed if a project's external client timeentries are due to be approved)
- Administrator Time Entry Approvals** (Will be showed if system administrator timeentries are due to be approved)

| Employee Name | Timesheet Period      | Billable Hours | Non-billable Hours | Total Hours | Approved              | Rejected              | Approver's Comments |
|---------------|-----------------------|----------------|--------------------|-------------|-----------------------|-----------------------|---------------------|
| John Benson   | 6/24/2013 - 6/30/2013 | 04:00          | 00:00              | 04:00       | <input type="radio"/> | <input type="radio"/> |                     |
|               |                       | 04:00          | 00:00              | 04:00       |                       |                       |                     |

Check-All Approved Uncheck-All Approved

## To review a time sheet record:

- Approver can see whole period timesheet by clicking on employee name link. This will launch read-only view of employee time-sheet period.

**TIMELIVE**

Show All

Employee Name: John Benson Period Date: 6/24/2013 - 6/30/2013

**Time Entry Week View**

| Project Name | Task Name                     | Mon 6/24 | Tue 6/25 | Wed 6/26 | Thu 6/27 | Fri 6/28 |
|--------------|-------------------------------|----------|----------|----------|----------|----------|
| LEGO         | Implementing Epidemic round 2 | 04:00    |          |          |          |          |
| Total        |                               | 04:00    |          |          |          |          |

Total Duration: 04:00

\_\_\_\_\_  
Consultant Signature

\_\_\_\_\_  
Client Signature

### To Approve a time sheet record:

1. Select **[Approved]** checkbox on time entry record which you want to approve.
2. Enter your comments in "Approver's Comments".
3. Click on **[Update Time Entry Approvals]** button to confirm these approvals.

### To Reject a time sheet record:

1. Select **[Rejected]** checkbox on time entry record which you want to reject.
2. Enter your comments in "Approver's Comments".
3. Click on **[Update Time Entry Approvals]** button to confirm these changes.

### Approval Types (Workflows)

Approval types identify the individuals who will be approving users' timesheets and expenses. You can setup many different approver types, each of which will have a specific approval function within the approval path.

Workflows establish which manager(s) must approve an employee's time or expense submissions before those entries can be processed for project costs, billing, payroll, reports, etc. When multiple approvals are required for the same submission (e.g., first the Project Manager and then the HR Manager), the workflow also controls which manager approves first, second, and so on.

A workflow is first created in the [Approval Types] view and then assigned to individual projects. When the employee submits a time or expense entry, the designated manager then approves the time and expenses using the Time & Expense approval view. When signing on, an approving manager is notified when submitted entries are awaiting approval.

System administrator can setup **[Approval Types]** name using **[Admin Options]** --> **[Approval Types]**

| Approval Type List                                |                   |      |        |
|---|-------------------|------|--------|
| Approval Type Name                                | Time Off Approval | Edit | Delete |
| Team Lead --> Project Manager --> Administrator   | No                |      |        |
| Team Lead --> Project Manager                     | No                |      |        |
| Project Manager                                   | No                |      |        |
| Employee Manager                                  | No                |      |        |
| Project Manager --> External User (Team Alliance) | No                |      |        |
| Administrator                                     | Yes               |      |        |
| Employee Manager                                  | Yes               |      |        |

## Approval Paths:

Approval paths define the approval process for the users in your organization. You can include five different types of approver in your approval path definition. You can define approval sequence for each of the approval path in your approval paths definition.

| Approval Type                                  |               |          |          |
|--|---------------|----------|----------|
| Approval Type                                  |               |          |          |
| Approval Type Name: <input type="text"/>       |               |          |          |
| Is Time Off Approval: <input type="checkbox"/> |               |          |          |
| Approval Path                                  |               |          |          |
| Approver Type                                  | External User | Employee | Sequence |
| Select   | Select        | Select   | 1st      |
| Select   | Select        | Select   | 1st      |
| Select   | Select        | Select   | 1st      |
| Select   | Select        | Select   | 1st      |
| Select   | Select        | Select   | 1st      |

## Approver types:

There are five type of approver types in timelive which you can define in approval paths.

1. Team Lead
2. Project Manager
3. Specific Employee (if you want your timesheet / expenses to be approved by some specific employee)
4. Specific External User (if you want your timesheet / expenses to be approved by some specific external user (client))
5. Employee Manager (Employee own manager defined in employee form).

## Simultaneous / Alternate Approvals

Multiple approvers can receive and approve the same item concurrently. For example, if you have defined two approval types named Supervisor and Administrator, you can assign them both 1st position in the approval sequence, and they will both receive approval items simultaneously.

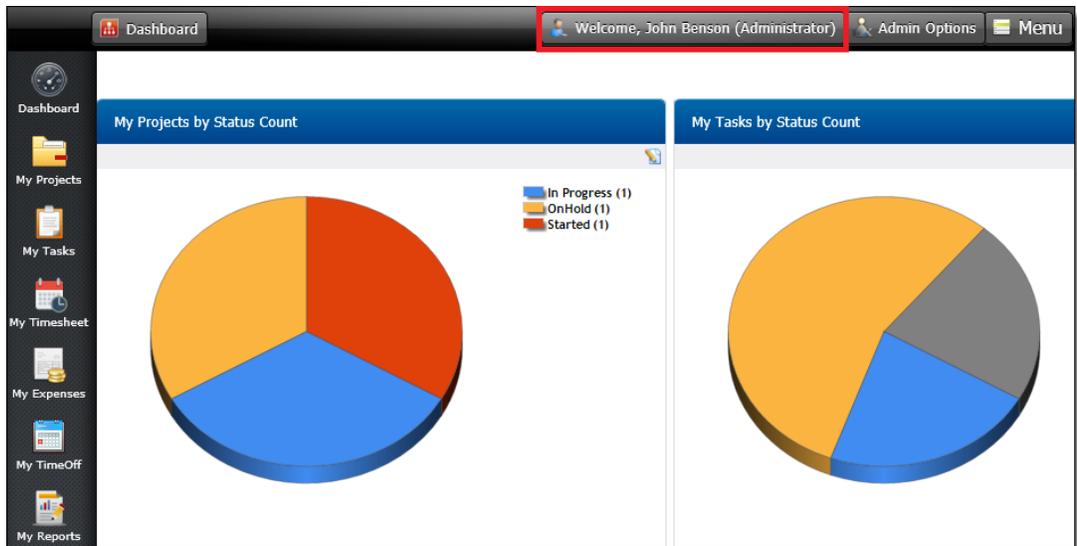
## More About Attendance Module:

### Attendance through Employee Profile

In some companies, Users only require to punch-in Time and punch-out Time for their presence verification. TimeLive allow user to Time In/Time Out in the most simple and basic way as soon as user login to his/her account.

To Achieve this, user first need to enable this feature from his/her profile.

- > **Login** to your **TimeLive Account**.
- > Click on your **Profile**.

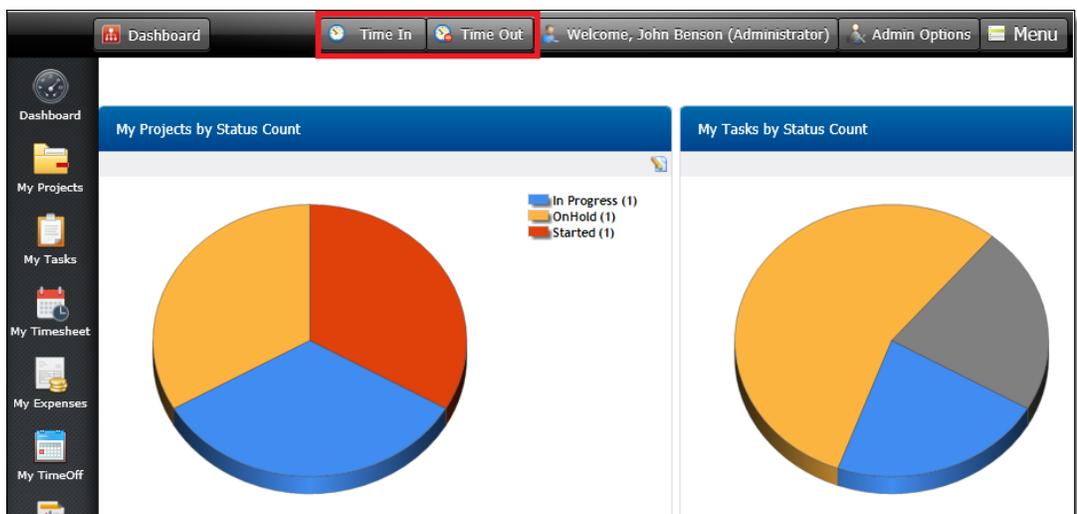


> **Enable** check "**Enable Time In/Out Option**" and click **Update**.

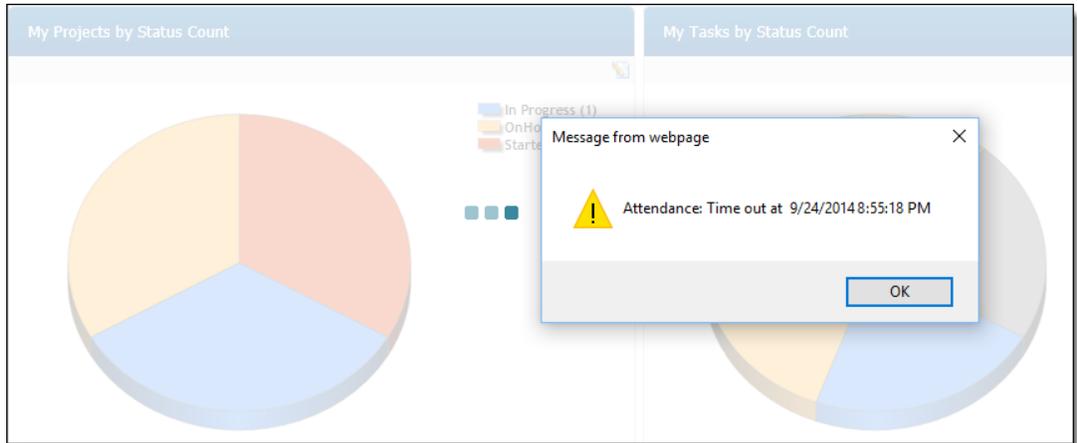
The form shows the following fields and controls:

- Time Zone: (-7.00) Mountain Time (US & Canada) [Dropdown]
- Enable Time In/Out Option:
- Password section:
  - \*Current Password: [Text Input]
  - \*Password: [Text Input]
  - \*Verify Password: [Text Input]
- Buttons: Update, Cancel

> **Time In** and **Time Out** buttons will now show besides the User Profile.



> **Click** on **Time In** button to input **Login Time** and Time Out button to input **Logout Time**. TimeLive will automatically record System Time.



### Attendance through Time Entry Day View.

Attendance is punch in / punch out of employees in order to track actual physical availability on work. Employee attendance and time entry are two different option to track two different things.

Attendance list and its form is available at **[Time entry day view]** which can be launch using **[My timesheet]** menu option

**Time Entry Day View**

| Project                             | Project Task                     | TotalTime            | Description          |
|-------------------------------------|----------------------------------|----------------------|----------------------|
| Select Project <input type="text"/> | Select Task <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Select Project <input type="text"/> | Select Task <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <b>Time Off</b>                     | Holiday <input type="text"/>     | <input type="text"/> | <input type="text"/> |
| <b>Time Off</b>                     | Holiday <input type="text"/>     | <input type="text"/> | <input type="text"/> |
|                                     |                                  | 00:00                |                      |

**Copy From:** 
...
Copy Timesheet
Copy Activities
Save

**Status Legend**
■ Not Submitted
 ■ Submitted
 ■ Approved
 ■ Rejected

**Employee Attendance List**

| Id | In/Out | Time | Absent |  |  |
|----|--------|------|--------|--|--|
|    |        |      |        |  |  |

Add

- A time entry record is an employee activity on a project for a particular duration. This is useful for calculating employee actual employee time spent on project task.
- **Time In** represent time when employee enter an organization and **Time Out** represents when employee finish his day work.
- A case can be
  - 8:00 AM (Employee TimeIn through employee attendance)

**Employee Attendance information**

**Employee Attendance**

\* **In/Out:**  ▼

\* **Time:**

\* **Absence:**  ▼

**Employee Attendance List**

| Id   | In/Out | Time    | Absent |      |        |
|------|--------|---------|--------|------|--------|
| 1734 | In     | 8:00 AM |        | Edit | Delete |

- Work start on a project task from 8:30 AM to 12:30 PM . This is a case of timesheet record of recording employee activities on project.
- At 12:30 PM, Employee took a break of lunch for an hour.
- Then start working again from 1:30 PM.
- Perform a task from 1:30 PM to 4 PM (will be record in timesheet)
- 4:00 PM (Out) (Employee leave with attendance record of "Out : 4:00 PM)

**Employee Attendance List**

| Id   | In/Out | Time    | Absent |      |        |
|------|--------|---------|--------|------|--------|
| 1734 | In     | 8:00 AM |        | Edit | Delete |
| 1735 | Out    | 4:00 PM |        | Edit | Delete |

- This is very typical case of attendance through which we can record one time in record when employee arrive and one time out record when employee leave.
- Attendance module of TimeLive also allow employees to enter their Paid Time Off (PTO) leave and Holiday.

### How to add new attendance record:

1. Click on **[My Timesheet]** to launch time entry day view.
2. In employee attendance form, select **"In"** in **["In / Out"]** drop-down. Select **"Out"**, if you are recording time out of employee.
3. In Time field, select time of employee time in.
4. Select **"Present"** in **[Absence]** drop-down.
5. Click on **[Add]** to add this **[Time In]** entry.

### How to enter employee leave record:

1. Click on **[My Timesheet]** to launch time entry day view. In employee attendance form, leave **["In / Out"]** drop-down as blank.
2. Leave time field empty.
3. Select your required leave type in **[Absence]** drop-down.
4. Click on **[Add]** to add this **[LEAVE]** entry.

### How to modify attendance record:

1. In employee attendance list, click on **[Edit]** on record which you want to modify.
2. Update this record with your required modification in **[Employee Attendance Information]** form.
3. Click on **[update]** button to update this record.

### How to delete attendance record:

1. In **[Employee Attendance List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **[OK]** to confirm this delete on confirmation dialog box.

## Timesheet Audit in My Timesheet:

In My Timesheet User/Administrator (depends on Role Permission) can view Period Timesheet Audit.

Day View | Timesheet Periods | Save | Submit | Start Timer | **Audit**

Employees: 001 - John Benson

Current Timesheet Period: 31/10/2016 - 06/11/2016

Time Entry Date: 31/10/2016

Timesheet Total: 40:00

Timesheet Status: ■ Approved

| Time Entry Week View |              | Mon<br>31/10 | Tue<br>01/11 | Wed<br>02/11 | Thu<br>03/11 | Fri<br>04/11 |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| LEGO                 | Project plan | 07:00        | 02:00        | 03:00        | 08:00        | 08:00        |
| LEGO                 | Project plan | 01:00        | 06:00        | 05:00        |              |              |
| Select Project       | Select Task  |              |              |              |              |              |
| Select Project       | Select Task  |              |              |              |              |              |
| Time Off             | Holiday      |              |              |              |              |              |

Timesheet Audit button is visible for Users (depends on Role Permission) to view the period Activity. This Audit will show any changes done by user and approval process in detail.

| Timesheet Period Audit |               |                     |                     |             |
|------------------------|---------------|---------------------|---------------------|-------------|
| Updated Date           | Field Name    | Old Value           | New Value           | Updated By  |
| 31/10/2016 05:27:39    | ApprovedBy    | Bob Bingham         | John Benson         | John Benson |
| 31/10/2016 05:27:39    | ApprovedOn    | 31/10/2016 05:23:00 | 30/10/2016 23:00:00 | John Benson |
| 31/10/2016 05:23:20    | ApprovedOn    |                     | 31/10/2016 05:23:00 | John Benson |
| 31/10/2016 05:23:20    | Approved      | No                  | Yes                 | John Benson |
| 31/10/2016 05:23:20    | ApprovedBy    |                     | Bob Bingham         | John Benson |
| 31/10/2016 05:22:50    | Rejected      | Yes                 | No                  | John Benson |
| 31/10/2016 05:22:50    | Submitted     | No                  | Yes                 | John Benson |
| 31/10/2016 05:22:08    | Rejected      | No                  | Yes                 | John Benson |
| 31/10/2016 05:22:08    | RejectedBy    |                     | Bob Bingham         | John Benson |
| 31/10/2016 05:22:08    | RejectedOn    |                     | 31/10/2016 05:22:00 | John Benson |
| 31/10/2016 05:22:08    | Submitted     | Yes                 | No                  | John Benson |
| 31/10/2016 05:19:34    | Submitted     | No                  | Yes                 | John Benson |
| 31/10/2016 05:19:34    | SubmittedBy   |                     | John Benson         | John Benson |
| 31/10/2016 05:19:34    | SubmittedDate |                     | 31/10/2016          | John Benson |

| Timesheet Audit     |              |              |            |            |           |           |             |
|---------------------|--------------|--------------|------------|------------|-----------|-----------|-------------|
| Updated Date        | Project Name | Task Name    | Total Time | Field Name | Old Value | New Value | Updated By  |
| 31/10/2016 05:19:18 | LEGO         | Project plan | 08:00      | TotalTime  | 07:00     | 08:00     | John Benson |
| 31/10/2016 05:19:18 | LEGO         | Project plan | 08:00      | TotalTime  | 07:00     | 08:00     | John Benson |
| 31/10/2016 05:19:18 | LEGO         | Project plan | 08:00      | TotalTime  | 07:00     | 08:00     | John Benson |
| 31/10/2016 05:19:18 | LEGO         | Project plan | 08:00      | TotalTime  | 07:00     | 08:00     | John Benson |
| 31/10/2016 05:19:18 | LEGO         | Project plan | 08:00      | TotalTime  | 07:00     | 08:00     | John Benson |

In the above image and under **1st Audit Grid**, date and time of Submission, Rejection and approval Date and Time along with Approver Name and submitter Name are shown along with old and new status of the Timesheet Period.

In the **2nd Audit Grid** it shows that there are 5 entries in total in this particular period along with their old and new values when submitted by Submitter Name.



# Expense Sheet Setup

## Expense Types setup

Expense types are the different categories of expenses. Application administrator can create different expense types according to their organization needs.

Expense Type also allow administrator to define either that expense types require quantity input in expense entry. In case of "Car Mileage" where users are required to enter "Miles/Kilometer" in expense entry, administrator can enable quantity field with its own defined caption in expense type.

System administrator can setup Expense Types **[Admin Options]** --> **[Expense Types]**

The screenshot shows a web interface for managing expense types. At the top, there is a 'Tax Zone' dropdown menu set to 'Default'. Below this is a table titled 'Expense Type List' with columns for 'Id', 'Expense Type', 'Tax Code', 'Edit', and 'Delete'. The table contains the following data:

| Id  | Expense Type | Tax Code    | Edit | Delete |
|-----|--------------|-------------|------|--------|
| 189 | Air Travel   | Airport Tax |      |        |
| 190 | Hotel        | GST         |      |        |
| 191 | Auto Rental  |             |      |        |
| 192 | Taxi         |             |      |        |
| 193 | Telephone    |             |      |        |
| 194 | Parking      |             |      |        |
| 195 | Tolls        |             |      |        |
| 196 | Car Mileage  |             |      |        |
| 197 | Gas          |             |      |        |
| 198 | Food         | GST         |      |        |

Below the table is a form titled 'Expense Type Information' with the following fields:

- \*Expense Type:
- Tax Code:
- Show Quantity:
- \*Quantity Caption:
- 

## Adding new Expense type:

To add new expense type:

1. Enter expense type in "Expense Type Information" form which you want to add.
2. Select Tax Code (Tax codes define different types of tax, that can be applied to the expense codes defined in your system. Administrator can create regional based taxes in order to support tax calculation based on user own region.)
3. Check on "Show Quantity" checkbox, if administrator wants input of quantity in expense entry for this particular expense type. Example of quantity field is "Car Mileage" where users are required to enter "Miles/Kilometer" in expense entry
4. Enter Quantity Caption in case if this expense type is quantity based.
5. Click on **[Add]** to add this expense type in timelive system.

## Deleting Expense Type:

1. In [Expense Type List], click on **[Delete]** link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

## Editing Expense Type:

1. In **[Expense Type List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in [Expense Type Information] form.
3. Click on **[Update]** button to update this record.

## Expenses Code Setup

Expense codes define the different costs incurred for business activities and purchases. You can create your required expense codes using Expenses option of administration.

Adding expense codes will allow you to identify the types of expenses that may be entered against specific projects. Expense codes will also allow you to track the kinds of expenses being recorded by TimeLive users.

System administrator can setup expenses name using **[Admin Options]** --> **[Expenses]**

The screenshot shows two parts of a web application interface. The top part is a table titled "Expense List" with columns for Id, Expense Name, Expense Type, Billable, Edit, and Delete. The bottom part is a form titled "Expense Information" with fields for Expense Name, Expense Type (dropdown), Default Expense Rate, Disabled Editing Of Rate (checkbox), and Billable (checkbox), along with an "Add" button.

| Id | Expense Name | Expense Type | Billable | Edit | Delete |
|----|--------------|--------------|----------|------|--------|
| 19 | Air Travel   | Air Travel   | Yes      |      |        |
| 21 | Auto Rental  | Auto Rental  | Yes      |      |        |
| 22 | Car Mileage  | Car Mileage  | Yes      |      |        |
| 66 | Food         | Food         | Yes      |      |        |
| 64 | Gas          | Gas          | Yes      |      |        |
| 20 | Hotel Stay   | Hotel        | Yes      |      |        |
| 23 | Meals        | Food         | Yes      |      |        |
| 67 | Parking      | Parking      | Yes      |      |        |
| 65 | Taxi         | Taxi         | Yes      |      |        |

**Expense Information**

Expense

\*Expense Name:

\*Expense Type: Air Travel

Default Expense Rate:

Disabled Editing Of Rate:

Billable:

## Setting up Expenses:

### Adding new expenses:

To add new expense, follow these instructions.

1. Enter new expense name which you want to add in "Expense Information" form.
2. Select expense type in expense type dropdown.
3. Enter default expense rate for expense codes which are quantity based. Example of default expense rate is mileage rate for expense "Car Mileage". Administrator can define rate for that expense here.
4. Check on "Disabled Editing Of Rate", if administrator don't want user to change rates in expense entry. Administrator can disable mileage rate editing in expense entry by users, by checking on this checkbox.

5. Click on **[Add]** to add this expense code.

## Deleting Expense:

1. In **[Expense List]**, click on **[Delete]** link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

## Editing Expense:

1. In [Expense List], click on **[Edit]** link of record which you want to modify.
2. Update your required modification in [Expense Information] form.
3. Click on **[Update]** button to update this record.

## Payment Methods

Payment methods specify how expenses were paid. TimeLive includes a set of predefined payment methods that you can edit to meet the needs of your organization. You can also create new payment methods.

System administrator can setup organization departments using **[Admin Options]** --> **[Payment Methods]**

## Setting up Payment Methods:

By default, four default payment methods are available in TimeLive with name "American Express,Cash, Master Card,Visa". Administrator can rename these payment methods and can also add new payment methods.

| Id | Payment Method   | Edit | Delete |
|----|------------------|------|--------|
| 1  | American Express |      |        |
| 2  | Cash             |      |        |
| 3  | Master Card      |      |        |
| 4  | Visa             |      |        |

**Payment Method Information**

Payment Method

\*Payment Method:

**Add**

## Renaming "Default payment method":

1. Click on **[Edit]** link on default payment method record.
2. Enter new payment method name of default payment method.
3. Click on **[Update]** to update this change.

## Adding new payment method:

To add new payment method, follow these instructions.

1. Enter new payment method code and name in "**Payment Method Information**" form.

2. Click on **[Add]** to add this payment method.

## Deleting Department:

1. In **[Payment Method List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **[Yes]** on delete confirmation dialog

## Editing Payment Method:

1. In **[Payment Method List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Payment Method Information]** form.
3. Click on **[Update]** button to update this record.

## Tax Code Setup

Tax codes define different types of tax, that can be applied to the expense codes defined in your system.

When you add a tax code, you will be required to enter its tax formula. This formula, which is based on the net amount of the expense, determines how TimeLive calculates the tax.

System administrator can setup organization departments using **[Admin Options]** --> **[Tax Codes]**

## Setting up Tax Codes:

| Tax Code |                 |             |      |        |
|----------|-----------------|-------------|------|--------|
| Id       | Tax Code        | Formula     | Edit | Delete |
| 1        | Airport Tax     | 10.00       |      |        |
| 2        | GST             | Net * 0.05  |      |        |
| 3        | Hotel Tax       | Net * 0.06  |      |        |
| 4        | PST             | Net * 0.07  |      |        |
| 5        | State Sales Tax | Net * 0.065 |      |        |
| 6        | VAT             | Net * 0.15  |      |        |

| Tax Code Information               |                      |
|------------------------------------|----------------------|
| Tax Code                           |                      |
| *Tax Code:                         | <input type="text"/> |
| *Formula:                          | <input type="text"/> |
| <input type="button" value="Add"/> |                      |

## Renaming "Default tax code":

1. Click on **[Edit]** link on default tax code record.
2. Enter new tax code name of default tax code.
3. Click on **[Update]** to update this change.

## Adding new tax code:

To add new tax code, follow these instructions.

1. Enter new tax code code and name in **"Tax Code Information"** form.

2. Click on **[Add]** to add this tax code.

### **Deleting Department:**

1. In **[Tax Code List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **[Yes]** on delete confirmation dialog

### **Editing Tax Code:**

1. In **[Tax Code List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Tax Code Information]** form.
3. Click on **[Update]** button to update this record.



# Expenses

## Expense Entry

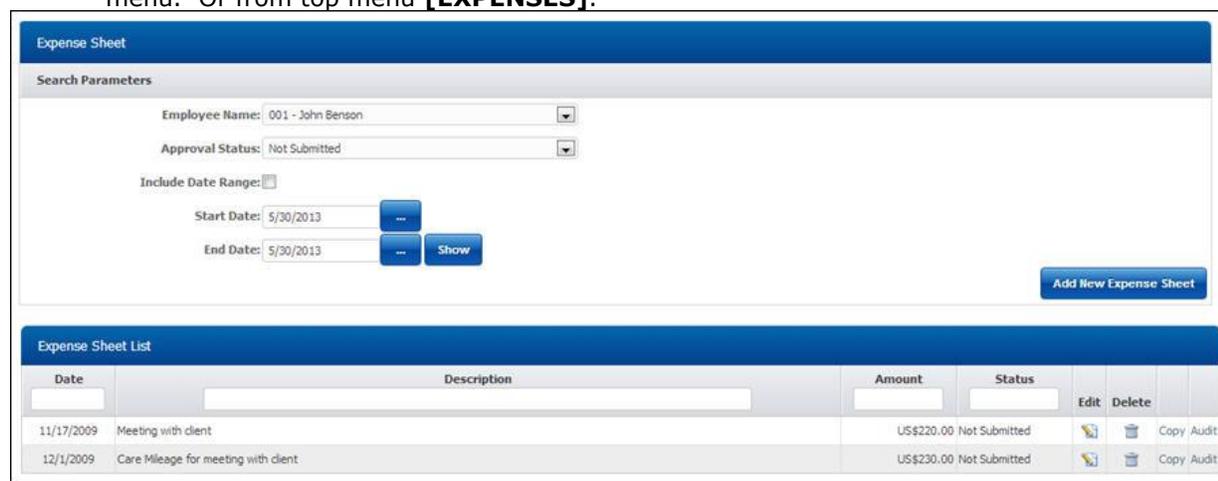
An expense is cost incurred from work-related tasks and/or purchases (travel, meals, office supplies, etc.). Expenses may be non-billable or billable, the latter applying to expenses for a project funded by a specific client.

Users complete and submit their expense sheets to team lead, project manager, and/or clients for approval. The expense sheets are then reviewed and either approved or rejected. When the expense sheet is approved, the expense information is saved to the database.

Once an expense sheet is submitted, the data can be analyzed by project leaders and administrator to determine project costs and client billing.

## More about Expense sheet:

1. A single expense sheet allows user to submit multiple expenses.
2. A user fills out and submits an expense sheet, uploading any available receipts.
3. The user can choose which project each expense was associated with.
4. User can print an expense sheet for signature purpose.
5. The expense sheet is automatically sent to one or more approvers.
6. The approvers approve the expense sheet.
7. The finance department can reimburse the user based on the approved expense sheets.
8. The expenses can be exported for client billing or reviewed against project estimates.
9. Expense sheets screen can be access using **<My Area> -- <My Expense Sheet>** from main menu. Or from top menu **[EXPENSES]**.



| Date       | Description                          | Amount     | Status        | Edit | Delete | Copy | Audit |
|------------|--------------------------------------|------------|---------------|------|--------|------|-------|
| 11/17/2009 | Meeting with client                  | US\$220.00 | Not Submitted |      |        | Copy | Audit |
| 12/1/2009  | Care Mileage for meeting with client | US\$230.00 | Not Submitted |      |        | Copy | Audit |

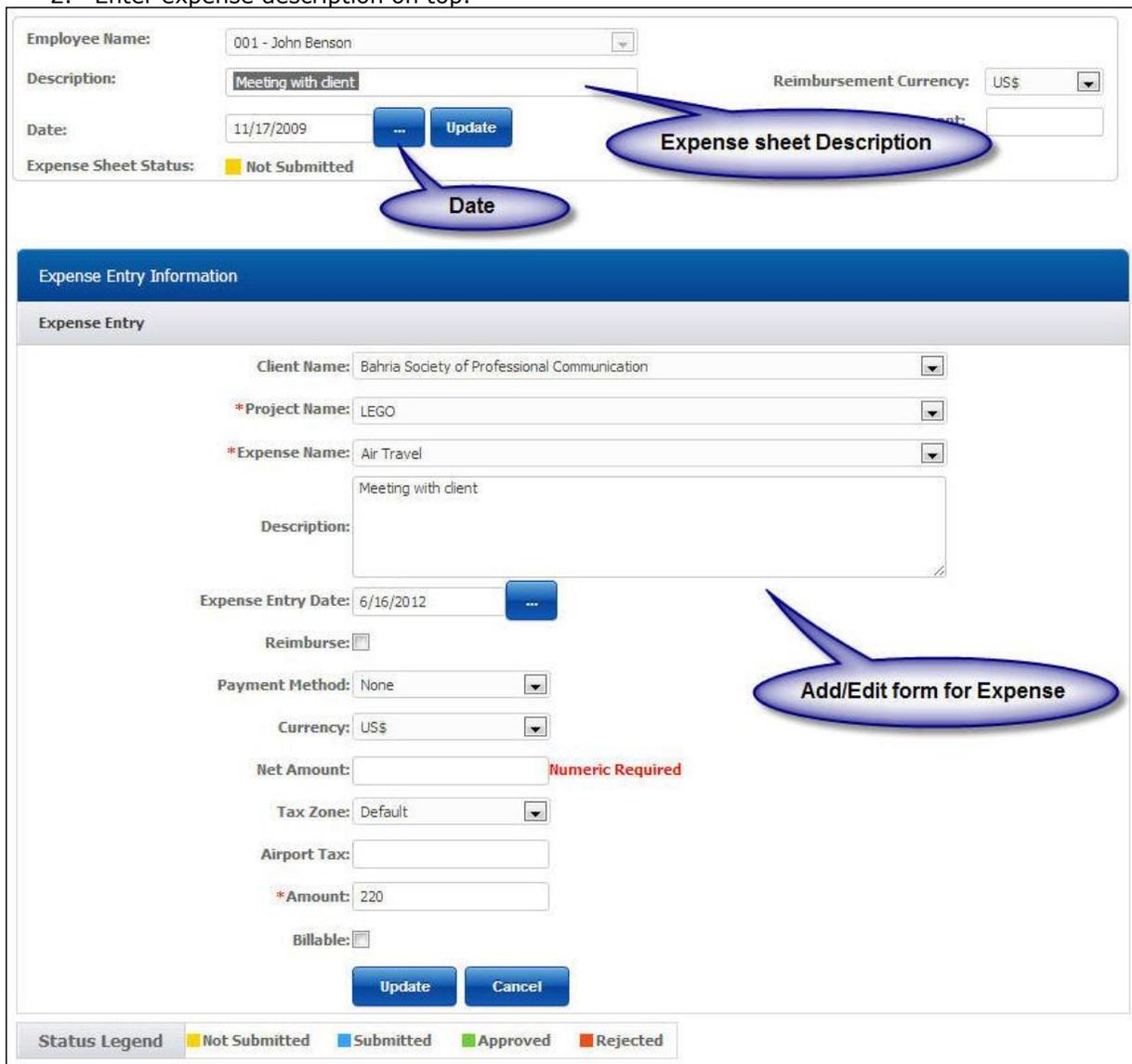
## More about Expense sheet list :

1. User can add a new expense sheet by clicking on **[Add New Expense Sheet]** button.
2. User can filter all expense sheets using approval status and date range.
3. User can edit any expense sheet by clicking on **[Edit]** link of that expense sheet.
4. User can duplicate any existing expense sheet by clicking on **[Copy]** link of that expense sheet.
5. User can delete an expense sheet by clicking on **[Delete]** icon of that expense sheet.

## Add new Expense sheet :

To add new expense sheet from expense sheet list:

1. Click on **[Add New Expense Sheet]** button in expense sheet list.
2. Enter expense description on top.



Employee Name: 001 - John Benson

Description: Meeting with client

Date: 11/17/2009

Reimbursement Currency: US\$

Expense Sheet Status: Not Submitted

Expense Entry Information

Expense Entry

Client Name: Bahria Society of Professional Communication

\*Project Name: LEGO

\*Expense Name: Air Travel

Description: Meeting with client

Expense Entry Date: 6/16/2012

Reimburse:

Payment Method: None

Currency: US\$

Net Amount:  **Numeric Required**

Tax Zone: Default

Airport Tax:

\*Amount: 220

Billable:

Update Cancel

Status Legend: Not Submitted Submitted Approved Rejected

1. Select your reimbursement currency
2. Click on **[...]** to open date picker for expense entry date and select your expense sheet date.
3. After adding expense sheet information, user should enter expense entries records using instructions mentioned below.

### Adding expense entry :

1. In **[Expense Entry Information]** form, enter project name whose expense entry you want to enter.
2. Select your required **[Expense Type]**.
3. Enter description of expense entry.
4. Select **[Reimburse]** check box if you paid for the expense and require reimbursement.
5. Select different available payment methods like Cash, Credit Card etc.
6. Select currency of your expense.

7. Select quantity field (if this expense is configured to get input of quantity field).
8. Rate (if this expense is configured to get input of quantity field).
9. Amount (will be automatically calculated if this is a quantity field)
10. Tax Amount (will be appear only if this expense is configured as a tax able expense).
11. Net Amount (automatically calculate)
12. Enter amount of expense entry.
13. Click on **[Add]** button to add this expense entry.

### **Attaching documents expense entry :**

1. Click on **[Attachments]** link on expense entry to open attachment page for that particular expense entry.
2. You can then upload receipts and other expense related documents at this page.

### **Deleting Expense Entry:**

1. In **[Expense Entry List]**, click on **[Delete]** link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

### **Editing Expense Entry:**

1. In **[Expense Entry List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Expense Entry Information]** form.
3. Click on **[Update]** button to update this record.

### **Submitting expense sheet:**

- Click on **[Submit]** button to submit expense entries for approvals.

### **Expense Approval**

#### **Launching Expense Approval:**

To launch expense approval, click on **<Project Management> --> <Expense Approval>** option in left side navigation menu.

#### **Approving expense records:**

Expense Approval page shows four possible expense approval tables depend upon logged in employee role in different projects and **expense approval path** defined for those projects. These are the possible types of expense approval tables available in expense approval page.

1. **My Team Expense Entry Approvals** (Will be showed if a project's team lead expense entries are due to be approved)
2. **My Projects Expense Entry Approvals** (Will be showed if a project's project manager expense entries are due to be approved)
3. **Client Expense Entry Approvals** (Will be showed if a project's external client expense entries are due to be approved)

4. **Administrator Expense Entry Approvals** (Will be showed if system administrator expense entries are due to be approved)

**Expense Approval**

Search Parameters

Employee Name: < All >

Include Date Range:

Expense Entry Start Date: 6/24/2013

Expense Entry End Date: 6/24/2013

Show

Update Expense Entry Approvals

**My Projects Expense Entry Approvals**

| Employee Name | Description         | Date     | Amount      | Approved              | Rejected              | Approver's Comments |
|---------------|---------------------|----------|-------------|-----------------------|-----------------------|---------------------|
| John Benson   | Meeting with client | 3/7/2010 | US\$ 910.00 | <input type="radio"/> | <input type="radio"/> |                     |

Check-All Approved Uncheck-All Approved

## To review expense sheet:

1. To view whole expense sheet before approval, an approver can click on "Employee Link" to open read-only view of expense sheet submitted by a user.
2. Approver can see attachments of expense entry records by click on attachment links.

**TIMELIVE**

Employee Name: John Benson Reimbursement Currency: US\$

Description: Meeting with client Total Reimbursement : 910.00

Date: 3/7/2010

**Expense Entry List**

| Date      | Project Name | Expense Name | Description                         | Payment Method | Quantity            | Rate | Net Amount | Tax Code    | Tax Amount | Amount      | Attachments       |
|-----------|--------------|--------------|-------------------------------------|----------------|---------------------|------|------------|-------------|------------|-------------|-------------------|
| 6/22/2013 | LEGO         | Air Travel   | Air travel to LEGO site.            | Visa           | 0                   | 0    | 600.00     | Airport Tax | 10.00      | US\$610.00  | <a href="#">Q</a> |
| 6/22/2013 | LEGO         | Car Mileage  | Rent a car for meeting with client. | Cash           | Miles/Kilometer 200 | 1.5  | 0.00       |             | 0.00       | US\$300.00  | <a href="#">Q</a> |
|           |              |              |                                     |                |                     |      | 600.00     |             | 10.00      | US\$ 910.00 |                   |

Consultant Signature \_\_\_\_\_ Client Signature \_\_\_\_\_

## To Approve a expense sheet records:

1. Select [**Approved**] checkbox on expense sheet record which you want to approve.
2. Enter your comments in "Approver's Comments".
3. Click on [**Update Expense Entry Approvals**] button to confirm these approvals.

## To Reject a expense sheet record:

1. Select [**Rejected**] checkbox on expense sheet record which you want to reject.
2. Enter your comments in "Approver's Comments".
3. Click on [**Update Expense Entry Approvals**] button to confirm these changes.



# Time Off

## Time Off Overview

Using Time Off feature, employees can check available time off, make a request, get manager approval. TimeLive time off and absence management provides a comprehensive time off and absence management solution unmatched in industry today.

| Time Off Type  | Effective Date | Initial Set To Hours | Earn Hours | Earn Period | Reset at   | Reset Hours | Maximum Available |
|----------------|----------------|----------------------|------------|-------------|------------|-------------|-------------------|
| Holiday        |                | 0                    | .0         | Never       | Never      | 0           | 0                 |
| Other          |                | 0                    | 0          | Never       | Never      | 0           | 0                 |
| Personal Leave |                | 0                    | 0          | Never       | Never      | 0           | 0                 |
| Sick Leave     |                | -40                  | 40         | Each Year   | Every Year | -40         | 0                 |
| Training       |                | 0                    | 0          | Never       | Never      | 0           | 0                 |
| Vacation       |                | 0                    | 80         | Each Year   | Every Year | 0           | 0                 |

## Features Of Time Off Module in TimeLive:

- Time off requests, approvals and scheduling.
- Users can see how much time off is entitled and request time off accordingly.
- Automated notifications: requests, approvals, rejections, approver notices.
- Unlimited time off types and balances
- Set up accrual rules that are automatically applied.
- Time off accruals engine.
- Multiple holiday schedules by country, country groups, or locales.
- Approvers can approve time off based on how much is entitled and how much has been requested.
- Multi-level Approval Paths for time off configurable at employee level
- You may record time off against any enabled **[Time Off]** type. Some **[Time Off Types]** may require **[Time Off Request]**, while others may not, as determined by your administrator
- If request is required for **[Time Off Type]**, you must submit **[Time Off Request]** for a time off type using the **[My Time Off]** page.
- Booked time off will automatically display in your timesheet.
- If "Request" is not required for a **[Time Off Type]**, you may enter it directly in your timesheet.
- User can see all **[Time Off Types]** balances while submitting **[Time Off Request]**.
- Administrator can check the Time Off status of each employee by clicking on **[Time Off]** link on "r;Employee" page.

## Time Off Types:

Time off types are categories that employees use to request or enter time off against. Commonly used time off types include vacation time, sick time, jury duty, or banked time.

TimeLive provide few pre-defined Time off Types. Administrator can create their own Time off Type based on their own organization needs.

Time off Types are of two types.

1. Time Off Types with "Request Required" enabled. User will be required to submit [Time Off Request] for these **[Time Off Types]**.
2. Time Off Types with "Request Required" disabled. User will be required to enter time off entries in timesheet directly for these **[Time Off Types]**.

The screenshot shows a web interface for managing Time Off Types. At the top is a table titled "Time Off Types List" with a search bar and columns for "Request Required", "Edit", and "Delete". The table contains the following data:

| Time Off Types | Request Required | Edit | Delete |
|----------------|------------------|------|--------|
| Holiday        | No               |      |        |
| Other          | Yes              |      |        |
| Personal Leave | Yes              |      |        |
| Sick Leave     | No               |      |        |
| Training       | Yes              |      |        |
| Vacation       | Yes              |      |        |

Below the table is a "Time Off Types Information" form with the following fields:

- Time Off Types:
- Time Off Request Required:
- 

## Adding New Time Off Type:

To add new Time off type:

1. Enter new Time off type in **[Time off Types Information]** form which you want to add.
2. Click on **[Add]** to add this Time off Type in time live system.

## Deleting Time Off Type:

1. In **[Time off Type List]**, click on [Delete] link of record which you want to delete.
2. Click on **[Yes]** on delete confirmation dialog

## Editing Time Off Type:

1. In **[Time off Type List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Time off Type Information]** form.
3. Click on **[Update]** button to update this record.

## Time Off Policies

Time off accrues is based on the accrual settings configured using **[Time Off Policies]** available in **[Admin Options]** --> **[Time off Policies]**. Administrator can create "Time off Policies" with different configurations and can assign these types separately to each individual employee. Following settings can be configured using time off policy option.

By default, TimeLive comes with one pre-populated time off policy name "Standard". Administrator can rename this time off policy and can also add new time off policies.

To setup Time off Policies according to organization rules & regulations, go to **[Admin Options]**--> **[Time off Policy]** option while login with Administrator user.

Time off policy allow Administrator to setup different policy configuration for each "Time Off Type" defined in **[Admin Options]**-->**[Time off Types]**.

| Time Off Type  | Effective Date | Initial Set To Hours | Earn Hours | Earn Period | Reset at   | Reset Hours | Maximum Available |
|----------------|----------------|----------------------|------------|-------------|------------|-------------|-------------------|
| Holiday        |                | 0                    | .0         | Never       | Never      | 0           | 0                 |
| Other          |                | 0                    | 0          | Never       | Never      | 0           | 0                 |
| Personal Leave |                | 0                    | 0          | Never       | Never      | 0           | 0                 |
| Sick Leave     |                | -40                  | 40         | Each Year   | Every Year | 40          | 0                 |
| Training       |                | 0                    | 0          | Never       | Never      | 0           | 0                 |
| Vacation       |                | 0                    | 80         | Each Year   | Every Year | 0           | 0                 |

In Time off Policy there are several fields. Every field has its own work. Following are the fields of Time off Policy.

- INITIAL HOURS:** Time Off Available balance will be set to this "Initial Hours" when Time Off policy will be first executed by "Time Off Accrual Engine"
- EARNED HOURS:** Total hours which will be earned after finish of every "Earned Period" (Weekly, Monthly, Yearly, Employee Anniversary Period).
- EARNED PERIOD:** TimeLive provide few pre-defined Earned Period which are.
  - Never: When "Never" is use, the time off policy does not works.
  - Each Week: When Administrator use this option, user will get earn hours after every week by Time Off Policy scheduler.
  - Each Month: When Administrator uses this option, user will get earn hours after every month by Time Off Policy scheduler.
  - Each Year: When Administrator uses this option, user will get earn hours on every year by Time Off Policy scheduler.
  - Each Year Anniversary: When Administrator uses this option, user will get earn hours on each year anniversary according to hired date of user.
- RESET AT:** There are four pre-defined Reset At which are.
  - Never: When Never is selected, reset hours will not be set.
  - Every Year: In this option, employee available balance will be set to "Reset Hours" value, every year by Time Off Policy scheduler.
  - Every Week: In this option, employee available balance will be set to "Reset Hours" value, every week by Time Off Policy scheduler..
  - Every Month: In this option, employee available balance will be set to "Reset Hours" value by Time Off Policy scheduler.
  - Each Year Anniversary: In this option, employee available balance will be set to "Reset Hours" value at every anniversary date of employee, according to hired date defined in employee form.
- RESET HOURS:** In this field, you can define your "Reset Hours" value which will be set to employee available balance at end of every "Reset At" period.
- MAXIMUM AVAILABLE:** Available balance of an employee cannot be increased more than maximum available hours, defined in **[Time Off Policy]**.

## How to reset Policy:

Reset button available in "Employee Time Off Page" allow administrator to reset all current period earned hours back to 0. And then at end of "Earned Period", TimeLive Time Off scheduler automatically add new earned hours based on policy defined for that particular employee.

## Time Off Request

Time Off Request in advance allows your supervisors to schedule around time when you will be away. Time off request will automatically display in your timesheet under the heading "Time Off" (even before it has been approved) (with its current approval status indicated by color coding).

## Adding New Time Off Request:

| Time Off Type | Description | Hours Off | Begin Date | End Date  | Approval Status | Edit | Delete |
|---------------|-------------|-----------|------------|-----------|-----------------|------|--------|
| Vacation      |             | 8         | 5/30/2013  | 5/30/2013 | Submitted       |      |        |

[Add Time Off Request](#)

| Time Off Type  | Earned | Consumed | Available |
|----------------|--------|----------|-----------|
| Vacation       | 0      | 0        | 0         |
| Sick Leave     | 40     | 0        | 40        |
| Personal Leave | 0      | 0        | 0         |
| Holiday        | 0      | 0        | 0         |
| Training       | 0      | 0        | 0         |
| Other          | 0      | 0        | 0         |

1. Employee can submit **[Time Off Request]** from **[My Time Off]** page. Time off request can be make only for those "Time Off Types" in which request is enable.
2. Administrator can configure **[Time Off Types]** from **[Admin Options]**-->**[Time Off Types]**
3. To add new request, click on **[My Time Off]** menu option available in left hand side menu.
4. Click on **[Add Time off Request]** button to add Time off request.
5. Select **[Time Off Type]** from dropdown in [Time off Request Information] form.

**Time Off Request Information**

**Time Off Request**

**Time Off Available: 0 hours**

Time Off Type:  ▼

Begin Date:  ...

End Date:  ...

Days Off:

Hours Off:

Description:

1. Select Begin date and End date for Time Off. (After setting the dates, Days off and Hours off will be calculated automatically).
2. Enter Days off for Time Off. (After enter the Days off, Date range and Hours off will set automatically).
3. Enter Hours off for Time Off. (After enter Hours off, Date range and Days off will set automatically).
4. Select project (Optional) for which you want to enter Time Off record. (A project selection dropdown can be enabled for Time Off Entry using **[Admin Options]**-->**[Preferences]** option name **[Show Project for Time Off]**.)
5. Click on **[Submit]** button, to save the changes and submit it for approval.
6. Once approved, "Available Balance" of that particular time off type will be decreased with number of hours requested in **[Time Off Request]**. In case of no approval require, available balance will be decreased immediately after submit.

### Viewing Time Off Request:

You can view:

1. All details of your personal time off requests with their approval status, in your **[My Time Off]** page.
2. User can find available balances of their assigned **[Time Off Types]** with their "Earned" in current period, "Consumed" in current period and "Available Balance" in **[My Time Off Page]**

### Editing of Time Off Request:

1. In **[My Time Off Page]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Time off Request Information]** form.
3. Click on **[Update]** button to update this record.

## Deleting of Time Off Request:

1. In **[My Time Off Page]**, click on **[Delete]** link of record which you want to delete.
2. Click on **[Yes]** on delete confirmation dialog.

## Time Off Approval

Depending on how your time off types are configured, time off entered against some or all time off types may require "Time Off Request". To submit time off request, users must complete a time off request form, and then submit it for approval. If approval is required, TimeLive sends each submitted **[Time Off Request]** through the sequence of approvers that comprise the user's time off approval path for review. Each approver can either approve or reject the request. If a **[Time Off Type]** does not require request, users enter time against that type directly into their timesheets.

## To Approve a time off record:

1. **[Time Off Request]** approval type can be created from **[Admin Options]**-->**[Approvals]**. Approvals type should have **[Is Time Off Approval]** checkbox checked.
2. Administrator can then set that **[Approval Type]** in employee **[Time Off Approval Type]** dropdown, while editing of employee information.
3. Time Off Request records can be approved or rejected from **[Manage]** --> **[Time Off Approval]**.
4. To Approve a time off record, select **[Approved]** checkbox on Time Off record which you want to approve.

| Employee Name | Time Off Type | Description | Day Off | Hours Off | Start Date | End Date  | Approved                 | Rejected                 | Comments |
|---------------|---------------|-------------|---------|-----------|------------|-----------|--------------------------|--------------------------|----------|
| John Benson   | Other         |             | 1       | 8         | 6/24/2013  | 6/24/2013 | <input type="checkbox"/> | <input type="checkbox"/> |          |

5. Enter your comments in "Comments" textbox.
6. Click on **[Update Time Off Approvals]** button to confirm these approvals.

## To reject a time off request:

1. Select **[Rejected]** checkbox on "Time Off Request Record" record which you want to reject.
2. Enter your comments in "Comments" textbox.
3. Click on **[Update Time Entry Approvals]** button to confirm these approvals.

# Billing Rate Setup

## TimeLive billing rates concepts

### Rate and Billing

There are four different types of **billing rate types** configurable at project level. Billing rate can be defined with its applicable date range with complete history. Timesheet then pick billing rate based on timeentry date from billing rate history defined at employee level, project role level or project employee level.

When you set up a project, you will do the following in addition to setting the basic project characteristics.

- Select type of billing rate pick option in **[Project]** from one of these options
  1. **[Use employee own billing rate]** TimeEntry will pick employee own billing rate defined in **[Employee]** form.
  2. **[Use Project Roles billing rate]** TimeEntry will pick role based billing rate defined in **[Project Roles]** configuration.
  3. **[Use Project employee billing rate]** TimeEntry will pick project based team member billing rate defined in **[Project Team]**
  4. **[Use Task based billing rate]** TimeEntry will pick billing rate defined in individual project tasks.
- Define the rates to be used for the project
- Assign a **[Project team]** and associate rates with each team member
- Specify **[Billable]** during adding of new task in order to separate billing and non-billing time recording for billing purpose.

## The Relationship Between Rates, Billing & Timesheet

It is very important that you understand the relationship between project rates, project billing options, and users' timesheets. Because the billing amount for a project is calculated based on the project rates and the time entered against the project by each member of the project team, you want to make sure that you set up the project effectively.

Remember that when you set up a project, you define the rates to be used for the project. You also assign a project team, associate rates with each team member, and specify billable and non-billable for each of the task.

### Employee Own Billing Rate

Administrator can launch billing rate history of individual employees by clicking on "**Employees-->Edit-->Billing Rate History**" link.

### Billing Rate History link in employee edit page:

**Employee Information**

**Personal Information**

Employee Code:

\* First Name:  Middle Name:

\* Last Name:  Address Line 1:

Address Line 2:  State:

City:  Zipcode:

Country:  Home Phone No:

Work Phone No:  Mobile Phone No:

Time Zone:

**Login / Employee Information**

\* Login Email Address:

\* Password:  \* Verify Password:

Job Title:  \* Department:

\* Role:  Employee Manager:

\* Location:  Employee Status:

Employee Type:  Working Day Type:

Employee Time Off Policy:  Time Off Approval Type:

Holiday Type:  User Interface Language:

Hired Date:  Termination Date:

Disabled:  Force Password Change:

**Billing Rate**

Work Type:  Billing Type:

Employee Rate Currency:  Employee Rate:

Billing Rate Currency:  Billing Rate:  [Billing Rate History](#)

Billing Rate Start Date:  Billing Rate End Date:

**Advanced**

Access Allowed From IP:

**Electronic Signature**

Electronic Signature:  No file chosen

Electronic signature size (Width 180px Height 50px)

**Profile Picture**

Show Employee Profile Picture:

Image:  No file chosen

Image size (Width 64px Height 64px)

## More about Employee own billing Rate:

- Using employee billing rate history, administrator can add new billing record with its applicable data and he can also modify any of existing record also by clicking on **[Edit]** link.
- Administrator can delete any of these billiing history record by clicking on **[Delete]** link.
- Billing history should be configure before entering timesheet record. Otherwise time entry will not pick billing rate defined after recording time entry.
- In case if Administrator want to modify time entry records which are already entered by other users, he can just add / edit billing rate record in history with selection of checkbox **[Update all records within time range]**. It will update existing time entry records also with this new updated billing rate in specified date range.

**Project And Employee Information**

Billing Rate Type:

Work Type:

Employee Name:

---

**Billing Rate List**

| Billing Rate | Employee Rate | Start Date | End Date  |      |        |
|--------------|---------------|------------|-----------|------|--------|
| US\$ 95.0000 | US\$ 65.0000  | 4/13/2010  | 4/13/2011 | Edit | Delete |

---

**Billing Rate Information**

**Billing Rate**

Billing Rate Currency:

Billing Rate:

Employee Rate Currency:

Employee Rate:

Start Date:

End Date:

Update all records within this range:

## Project Roles Billing Rate

System administrator can define **[Billing Rate Type]** as **[Project Roles Billing Rate]** to setup role wise billing rate for project. There are three steps for setting up role wise billing rate of project.

### Setting up Role based billing rate:

1. Define **[Project Roles Billing Rate]** in **[Billing Rate Type]** when adding new project in TimeLive.

Add Project

Project

Project Template:

\*Project Type:

\*Client Name:

\*Project Code:

\*Project Name:

\*Project Description:

Due Date:

\*Team Lead:

\*Project Manager:

Options

Billing

Default Billing Rate:

Project Billing Type:

Project Billing Rate Type:

Attachment

2. On click on **[Add]** button, TimeLive will open a **[Project Role]** definition page where use can setup number of resources required for each role and billing rate of every role. Just select your required **[Roles]** for which you want to define billing rate including its number of resources requirements.

Project Information

Project Id:  Project Code:

Project Name:

Work Type:

Project Roles

| Role                   | Number Of Resources            | Billing Rate Currency | Billing Rate                        | Employee Rate Currency | Employee Rate                    | Selected                            | Start Date | End Date  | History |
|------------------------|--------------------------------|-----------------------|-------------------------------------|------------------------|----------------------------------|-------------------------------------|------------|-----------|---------|
| Administrator          | <input type="text" value="1"/> | US\$                  | <input type="text" value="250"/>    | US\$                   | <input type="text" value="100"/> | <input checked="" type="checkbox"/> | 5/30/2013  | 5/30/2014 |         |
| Expense Entry Approver | <input type="text"/>           | US\$                  | <input type="text" value="0.0000"/> | US\$                   | <input type="text" value="0"/>   | <input type="checkbox"/>            | 5/30/2013  | 5/30/2014 |         |
| External User          | <input type="text" value="1"/> | US\$                  | <input type="text" value="150"/>    | US\$                   | <input type="text" value="75"/>  | <input checked="" type="checkbox"/> | 5/30/2013  | 5/30/2014 |         |
| Project Manager        | <input type="text"/>           | US\$                  | <input type="text" value="0.0000"/> | US\$                   | <input type="text" value="0"/>   | <input type="checkbox"/>            | 5/30/2013  | 5/30/2014 |         |
| Team Lead              | <input type="text"/>           | US\$                  | <input type="text" value="0.0000"/> | US\$                   | <input type="text" value="0"/>   | <input type="checkbox"/>            | 5/30/2013  | 5/30/2014 |         |
| Time Entry Approver    | <input type="text"/>           | US\$                  | <input type="text" value="0.0000"/> | US\$                   | <input type="text" value="0"/>   | <input type="checkbox"/>            | 5/30/2013  | 5/30/2014 |         |
| User                   | <input type="text"/>           | US\$                  | <input type="text" value="0.0000"/> | US\$                   | <input type="text" value="0"/>   | <input type="checkbox"/>            | 5/30/2013  | 5/30/2014 |         |

3. On clicking on **[Update]** button, timelive will open employee role mapping page where system administrator can define employee for each of the role requirement defined in **[Number of Resources]** for every role. Just map your required employee for each of the role and check on **[Selected]** checkbox. After completing this role employee mapping, click on **[Update]** to update these changes.

The screenshot displays a web interface for project management. It is divided into two main sections: 'Project Information' and 'Project Employee List'.

**Project Information:** This section contains three input fields: 'Project Id' with the value '96', 'Project Code' with the value 'RDS', and 'Project Name' with the value 'Refined Space Customer Service'.

**Project Employee List:** This section features a table with two columns: 'Role' and 'Employee Name'. Each row represents a role and its assigned employee, with a checkbox in the rightmost column to indicate selection.

| Role          | Employee Name |                                     |
|---------------|---------------|-------------------------------------|
| Administrator | Bob Bingham   | <input checked="" type="checkbox"/> |
| External User | John Ramos    | <input checked="" type="checkbox"/> |

Below the table is a blue 'Update' button.

### Launching billing rate history page of Role billing rate:

- Using role billing rate history, administrator can add new billing record with its applicable date and he can also modify any of existing record also by clicking on **[Edit]** link.
- Administrator can delete any of these billing history record by clicking on **[Delete]** link.
- Billing history should be configure for in all area before entering timesheet record. Otherwise time entry will not pick billing rate defined after recording time entry.
- In case if Administrator wants to modify billing rate of exiting time entry records, he can just add / edit billing rate record in history with selection of checkbox **[Update all records within time range]**. It will update existing time entry records also with this new updated billing rate in specified date range.
- To launch billing rate history page, just click on **[History]** link of any role selected for current project.

**Project And Employee Information**

Billing Rate Type:

Project Name:

**Billing Rate List**

| Billing Rate  | Employee Rate | Start Date | End Date  | Edit | Delete |
|---------------|---------------|------------|-----------|------|--------|
| US\$ 250.0000 | US\$ 100.0000 | 5/30/2013  | 5/30/2014 |      |        |

**Billing Rate Information**

**Billing Rate**

Billing Rate Currency:

Billing Rate:

Employee Rate Currency:

Employee Rate:

Start Date:

End Date:

Update all records within this range:

### Project based employee billing rate:

System administrator can define **[Billing Rate Type]** as **[Use Project Employee Billing Rate]** to setup project based employee billing rate. Project based employee billing rate is useful for projects where employee billing rate is different for every different project. There are two steps for setting up project based billing rate in a project.

### Setting up Project based employee billing rate:

1. Define **[Use Project Employee Billing Rate]** in **[Billing Rate Type]** when adding new project in TimeLive.

**Add Project**

**Project**

Project Template: Select

\*Project Type: Marketing

\*Client Name: Clutch Design Inc.

\*Project Code: CAC

\*Project Name: caCORE 3.1

\*Project Description: caCORE 3.1

Due Date: 5/30/2013

\*Team Lead: Bob Bingham

\*Project Manager: Bryan Barton

**Options**

**Billing**

Default Billing Rate: 0

Project Billing Type: Per Hour

Project Billing Rate Type: Use Project Employee Billing Rate

**Attachment**

**Custom Fields**

Submit Date: 5/30/2013

**Add** **Cancel**

2. On click on **[Add]** button, TimeLive will open a **[Project Team]** definition page where user can select project team required for this project with their billing rate.

**Project Information**

Project Id:

Project Code:

Project Name:

Work Type:

**Project Employee List**

| Employee Name   | Billing Rate Currency | Billing Rate | Employee Rate Currency | Employee Rate | Start Date | End Date  |   |
|-----------------|-----------------------|--------------|------------------------|---------------|------------|-----------|---|
| Bob Bingham     | US\$                  | 110.0000     | US\$                   | 90.0000       | 5/30/2013  | 5/30/2014 | <input checked="" type="checkbox"/> History |
| Bob Foppiano    | US\$                  | 110.0000     | US\$                   | 95.0000       | 5/30/2013  | 5/30/2014 | <input type="checkbox"/>                    |
| Brian Gardiner  | US\$                  | 80.0000      | US\$                   | 85.0000       | 5/30/2013  | 5/30/2014 | <input type="checkbox"/>                    |
| Bryan Barton    | US\$                  | 0.0000       | US\$                   | 0.0000        | 5/30/2013  | 5/30/2014 | <input checked="" type="checkbox"/> History |
| Darrell Packard | US\$                  | 0            | US\$                   | 0             | 5/30/2013  | 5/30/2014 | <input type="checkbox"/>                    |
| Jackie Alves    | US\$                  | 100.0000     | US\$                   | 75.0000       | 5/30/2013  | 5/30/2014 | <input type="checkbox"/>                    |
| Jhon McClain    | US\$                  | 0.0000       | US\$                   | 0.0000        | 5/30/2013  | 5/30/2014 | <input type="checkbox"/>                    |
| John Benson     | US\$                  | 0.0000       | US\$                   | 0.0000        | 5/30/2013  | 5/30/2014 | <input checked="" type="checkbox"/> History |
| John Ramos      | US\$                  | 70.0000      | US\$                   | 40.0000       | 5/30/2013  | 5/30/2014 | <input type="checkbox"/>                    |
| Michael Becker  | US\$                  | 85.0000      | US\$                   | 60.0000       | 5/30/2013  | 5/30/2014 | <input type="checkbox"/>                    |
| Mike Boltz      | US\$                  | 80.0000      | US\$                   | 70.0000       | 5/30/2013  | 5/30/2014 | <input type="checkbox"/>                    |
| Rich Jackson    | US\$                  | 65.0000      | US\$                   | 50.0000       | 5/30/2013  | 5/30/2014 | <input type="checkbox"/>                    |

3. After selecting employees which are required to assigned in this project, , click on **[Update]** to update these changes.

### Launching billing rate history page of Project based employee rate:

- Using billing rate history, administrator can add new billing record with its applicable date and he can also modify any of existing record also by clicking on **[Edit]** link.
- Administrator can delete any of these billing history record by clicking on **[Delete]** link.
- Billing history should be configure before entering timesheet record. Otherwise time entry will not pick billing rate defined after recording time entry.
- In case if Administrator wants to modify billing rate of exiting time entry records, he can just add / edit billing rate record in history with selection of checkbox **[Update all records within time range]**. It will update existing time entry records also with this new updated billing rate in specified date range.
- To launch billing rate history page, just click on **[History]** link of any role selected for current project.

# Invoicing

## About Invoicing

Invoice is made for a client. It is a receipt which shows client name, invoice number, invoice date, billing rate, bill hour, timesheet description and amount. Generated invoices are stored in the database along with your time logs and expense and can be viewed or edited at any time. Invoices can be created based on the existing time entries and expenses or alternatively, new records can be added as you're working on the invoice. As you keep saving more invoices, you can view statistics including total due to be paid, total taxes collected.

Billing managers can create invoices and can also check the previous records of the invoice by navigating to **[Billing]**-->**[Invoice Management]** menu on the left side menu.

Invoice can then **[Print]** or **[Generate PDF]** for sending it to customer. Invoice use company logo which is uploaded in **[Admin Options]**-->**[Preferences]**.



| Time Expense Invoice List           |  |             |              |             |                 |                   |
|-------------------------------------|--|-------------|--------------|-------------|-----------------|-------------------|
| <input type="checkbox"/>            | Client Name                                  | Invoice No. | Invoice Date | Description | Amount          |                   |
| <input type="checkbox"/>            |  |             |              |             |                 | Edit Delete Print |
| <input checked="" type="checkbox"/> | Clutch Design Inc.                           | 1           | 11/14/2009   |             | US\$ 535.00     | Edit Delete Print |
| <input checked="" type="checkbox"/> | Bahria Society of Professional Communication | 2           | 10/30/2012   | Testing     | US\$ 177,956.98 | Edit Delete Print |

## Manage Invoices

Billing managers can create invoices and can also check the previous records of the invoice by navigating to **[Billing]**-->**[Invoice Management]** menu on the left side menu.

## Adding New Invoice:

To add new invoice:

1. Click on **[Billing]** in left hand side menu.
2. Click on **[Invoice Management]**.
3. Click on **[Add]** button to add new Invoice.
4. Select the **[Client Name]** from the list (to whom you want to make the invoice).
5. In order to create invoice for a single project, select **[Project]** from the list. Keep it as "All" if you want to create invoice for all projects for a client.
6. Enter the date range in **[Billing Cycle Start Date]** and **[Billing Cycle End Date]** (period to be billed).
7. Click on the **[Populate Un-billed Records]** to populate all un-billed time and expense entries in invoice for the given date range.
8. Click on **[Update]** button to update the record.
9. Click on **[Update Time Entry and Expense Entry as Billed]** once you finished creating your invoice. This will update all time and expense entries as "Billed" in database in order to avoid duplicate invoicing of same data.

**Invoice Information**

**Account Time Expense Billing**

Invoice No:

PO Number:

Invoice Date:

Client Name:

Project Name:

Parent Task:

Currency:

Billable:

Tax 1:

Tax 2:

Group Timesheet Billing List By:

Group Expense Billing List By:

Billing Cycle Start Date:

Billing Cycle End Date:

**Timesheet Billing List**

| Project Name                        | Task Name                                | Description          | Actual Billing Rate | Billing Rate | Actual Hours | Bill Hours | Tax 1                               | Tax 2                               | Total Amount | Delete                                |
|-------------------------------------|--|----------------------|---------------------|--------------|--------------|------------|-------------------------------------|-------------------------------------|--------------|---------------------------------------|
| <input type="text" value="Select"/> | <input type="text" value="Select Task"/> | <input type="text"/> | 0                   | 0            | 0            | 0          | <input type="text" value="Select"/> | <input type="text" value="Select"/> | 0.00         | <input type="button" value="Delete"/> |
| <input type="text" value="Select"/> | <input type="text" value="Select Task"/> | <input type="text"/> | 0                   | 0            | 0            | 0          | <input type="text" value="Select"/> | <input type="text" value="Select"/> | 0.00         | <input type="button" value="Delete"/> |
| <input type="text" value="Select"/> | <input type="text" value="Select Task"/> | <input type="text"/> | 0                   | 0            | 0            | 0          | <input type="text" value="Select"/> | <input type="text" value="Select"/> | 0.00         | <input type="button" value="Delete"/> |
| <input type="text" value="Select"/> | <input type="text" value="Select Task"/> | <input type="text"/> | 0                   | 0            | 0            | 0          | <input type="text" value="Select"/> | <input type="text" value="Select"/> | 0.00         | <input type="button" value="Delete"/> |
| <input type="text" value="Select"/> | <input type="text" value="Select Task"/> | <input type="text"/> | 0                   | 0            | 0            | 0          | <input type="text" value="Select"/> | <input type="text" value="Select"/> | 0.00         | <input type="button" value="Delete"/> |

**Expense Billing List**

| Project Name                        | Expense Name                        | Expense Type                        | Description          | Actual Amount | Tax 1                               | Tax 2                               | Billed Amount | Delete                                |
|-------------------------------------|-------------------------------------|-------------------------------------|----------------------|---------------|-------------------------------------|-------------------------------------|---------------|---------------------------------------|
| <input type="text" value="Select"/> | <input type="text" value="Select"/> | <input type="text" value="Select"/> | <input type="text"/> | 0             | <input type="text" value="Select"/> | <input type="text" value="Select"/> | 0             | <input type="button" value="Delete"/> |
| <input type="text" value="Select"/> | <input type="text" value="Select"/> | <input type="text" value="Select"/> | <input type="text"/> | 0             | <input type="text" value="Select"/> | <input type="text" value="Select"/> | 0             | <input type="button" value="Delete"/> |
| <input type="text" value="Select"/> | <input type="text" value="Select"/> | <input type="text" value="Select"/> | <input type="text"/> | 0             | <input type="text" value="Select"/> | <input type="text" value="Select"/> | 0             | <input type="button" value="Delete"/> |
| <input type="text" value="Select"/> | <input type="text" value="Select"/> | <input type="text" value="Select"/> | <input type="text"/> | 0             | <input type="text" value="Select"/> | <input type="text" value="Select"/> | 0             | <input type="button" value="Delete"/> |
| <input type="text" value="Select"/> | <input type="text" value="Select"/> | <input type="text" value="Select"/> | <input type="text"/> | 0             | <input type="text" value="Select"/> | <input type="text" value="Select"/> | 0             | <input type="button" value="Delete"/> |

Sub Total:

Tax 1:

Tax 2:

Grand Total:

Description:

## Editing Invoice:

1. In **[Time Expense Invoice List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Invoice information]** form.
3. Click on **[Update]** to update this record.

## Deleting Invoice:

1. In **[Time Expense Invoice List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **[Yes]** on delete confirmation dialog.

## Printing Invoice:

1. Click on **[Print]** link to print your invoice. Invoice can be exported to PDF or XLS on print page using export option available.
2. Invoice use company logo which is uploaded in **[Admin Options]**-->**[Preferences]**.

## Updating Time and Expense Records as Billed:

At the end of finalizing the invoice, you need to mark "Billed" for the time & expense records included in the current invoice to prevent double invoicing of already billed entries.

1. Navigate to **[Invoice Management]**.
2. Click on **[Edit]** link of record which you want to modify.
3. Click on **[Update Time Entry and Expense Entry Records As Billed]** to make all time & expense entries "Billed".
4. **[Billed]** status of time entry records and expense entry records can be changed from **[Billing]**--**[Time Billing Worksheet]** and **[Billing]**-->**[Expense Entry Worksheet]**.

## Time Billing Worksheet

- Time billing worksheet allow accountant to manage and track all billable time entries with their billing status and invoice number.
- It contains all billable time entries.
- Time billing worksheet contains all the invoices with total billing time, billing rate and all other invoice related information.
- You can change the status of invoices and marked them as "Billed" / "Un-billed".
- To easily search for your required records using filters available there.
- To delete all invoices, use the option "Check All" and then click on **[Delete Selected Item]** to delete all checked entries.

The screenshot displays the 'Time Billing Worksheet' interface. It features a search parameters section with the following fields:

- Client Name: < All >
- Project: caCORE 3.1
- Project Tasks: Select Project Tasks
- Billed: Both
- Include Date Range:
- Start Date: 6/24/2013
- End Date: 6/24/2013
- Show button

Below the search parameters is a table with the following data:

| Date      | Employee Name | Task / Project                  | Invoice Detail                             | Billing Rate | Total Time | Billed                   | Edit |
|-----------|---------------|---------------------------------|--|--------------|------------|--------------------------|------|
| 6/13/2013 | Bob Bingham   | Consolidate Notes<br>caCORE 3.1 | Invoice No:<br>Invoice Date:<br>PO Number: | 0.0000       | 05:00      | <input type="checkbox"/> | Edit |
|           |               |                                 |  |              | 05:00      |                          |      |

## Expense Billing Worksheet

- Expense billing worksheet allow accountant to manage and track all billable expense entries with their billing status and invoice number.
- It contains all billable expense entries and expense sheets.
- Expense billing worksheet contains all the invoices with total billing expense, amount and all other invoice related information.

Expense Billing Worksheet

Search Parameters

Project: < All >

Client Name: < All >

Expense Name: < All >

Expense Type: < All >

Billed: Billed

Include Date Range:

Start Date: 5/30/2013

End Date: 5/30/2013

Expense Billing Worksheet

| Id | Employee Name | Project Name | Expense Name<br>(Expense Type) | Description | Invoice Detail  | Amount          | Billed                              | Edit |
|----|---------------|--------------|--------------------------------|-------------|---|-----------------|-------------------------------------|------|
| 84 | John Benson   | Template     | Food<br>Food                   |             | Invoice No: 2<br>Invoice Date: 10/30/2012<br>PO Number: | US\$ 10,342.50  | <input checked="" type="checkbox"/> | Edit |
| 85 | John Benson   | Template     | Air Travel<br>Air Travel       |             | Invoice No: 2<br>Invoice Date: 10/30/2012<br>PO Number: | US\$ 15,210.00  | <input checked="" type="checkbox"/> | Edit |
| 86 | John Benson   | Template     | Hotel Stay<br>Hotel            |             | Invoice No: 2<br>Invoice Date: 10/30/2012<br>PO Number: | US\$ 131,250.00 | <input checked="" type="checkbox"/> | Edit |

# Project Management

## Gantt Chart for Project Tasks

Viewing tasks in black and white cannot give that much info at a glance but viewing Tasks through Gantt chart is way better for understanding and task allocation.

Dashboard : Projects

Project Gantt View Welcome, John Benson (Administrator) Admin Options Menu

Search

Project List

| Id | Code      | Project Name                   | Client Name             | Start Date | Status      | Edit                  | Delete                |                      |                            |                            |                       |                       |                      |                            |                            |                       |                       |                      |                            |                            |
|----|-----------|--------------------------------|-------------------------|------------|-------------|-----------------------|-----------------------|----------------------|----------------------------|----------------------------|-----------------------|-----------------------|----------------------|----------------------------|----------------------------|-----------------------|-----------------------|----------------------|----------------------------|----------------------------|
| 16 | AB        | Agent Bank                     | Fair View Counseling .. | 11/1/2012  | Started     | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> |
| 15 | CAC       | caCORE 3.1                     | Barth Gross Electric .. | 11/17/2012 | Started     | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> |
| 18 | CLUTCH    | ClutchDesign.com website       | Clutch Design Inc.      | 11/19/2012 | Started     | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> |
| 22 | DMAC      | DMAC Reservation System        | The PSP Group           | 11/19/2012 | Started     | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> |
| 20 | GASP      | GASP                           | M L Entertainment       | 11/19/2012 | In Progress | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> |
| 24 | LEGO      | LEGO                           | Team Alliance Inc.      | 11/19/2012 | OnHold      | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> |
| 21 | OASIS V2+ | OASIS V2+                      | The PSP Group           | 11/19/2012 | Started     | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> |
| 17 | OPM       | OPMcreator                     | Crestwood Technology .. | 11/19/2012 | Completed   | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> |
| 23 | REFINDE   | Refined Space Customer Service | Refined Space           | 11/19/2012 | Started     | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> |
| 19 | SHIBV2    | Shibboleth V2                  | Barth Gross Electric .. | 11/19/2012 | Started     | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> | <a href="#">Gantt</a> | <a href="#">Tasks</a> | <a href="#">Team</a> | <a href="#">Milestones</a> | <a href="#">Attachment</a> |

Add Delete Selected

Through Gantt, User can add new tasks, allocate resource, its utilization and can make changes on the existing tasks. It will automatically update the tasks and its changed details including Task Team.

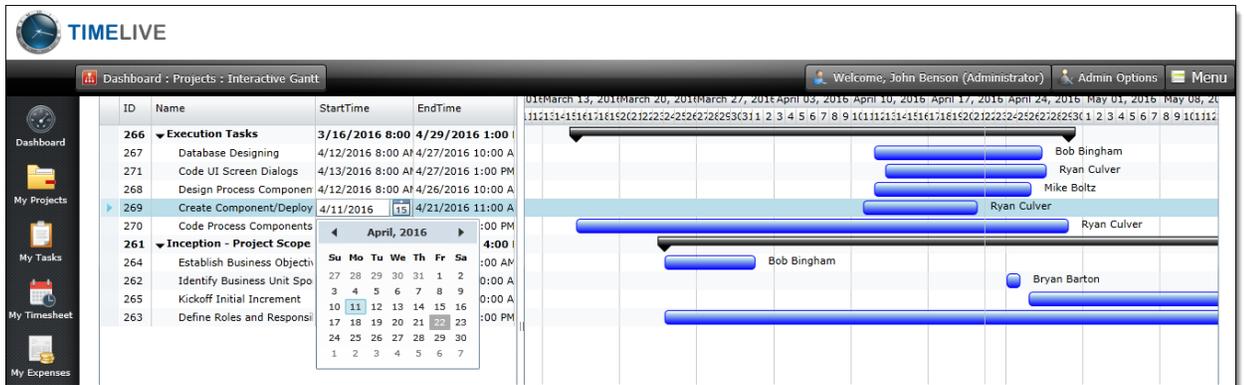
Dashboard : Projects : Interactive Gantt

Welcome, John Benson (Administrator) Admin Options Menu

Add Update Delete Resource

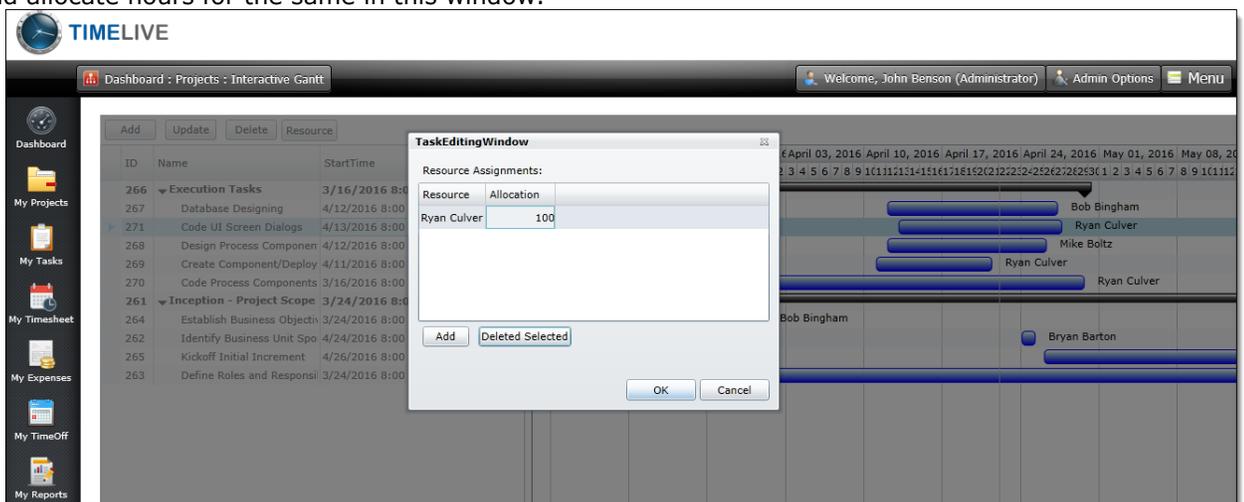
| ID  | Name                          | StartTime    | EndTime      | Duration |
|-----|-------------------------------|--------------|--------------|----------|
| 266 | Execution Tasks               | 3/22/2016    | 5/31/2016    | 565      |
| 267 | Database Designing            | 4/20/2016 8: | 5/20/2016 1: | 178      |
| 271 | Code UI Screen Dialogs        | 3/22/2016 8: | 3/30/2016 1: | 53       |
| 268 | Design Process Components     | 4/12/2016 8: | 4/28/2016 1: | 98       |
| 269 | Create Component/Deploym      | 4/1/2016 8:0 | 4/21/2016 1: | 115      |
| 270 | Code Process Components       | 5/1/2016 8:0 | 5/31/2016 1: | 173      |
| 261 | Inception - Project Scope     | 3/24/2016    | 5/31/2016    | 552      |
| 264 | Establish Business Objectives | 3/24/2016 8: | 3/24/2016 4: | 8        |
| 262 | Identify Business Unit Spons  | 4/24/2016 8: | 4/25/2016 1: | 2        |
| 265 | Kickoff Initial Increment     | 4/26/2016 8: | 5/31/2016 1: | 202      |
| 263 | Define Roles and Responsibil  | 3/24/2016 8: | 5/31/2016 4: | 392      |

March 20, 21March 27, 21April 03, 2013April 10, 2013April 17, 2013April 24, 2013April 30, 2013May 07, 2013May 14, 2013May 21, 2013May 28, 2013June 04, 2013June 11, 2013June 18, 2013June 25, 2013July 02, 2013July 09, 2013July 16, 2013July 23, 2013July 30, 2013August 06, 2013August 13, 2013August 20, 2013August 27, 2013September 03, 2013September 10, 2013September 17, 2013September 24, 2013October 01, 2013October 08, 2013October 15, 2013October 22, 2013October 29, 2013November 05, 2013November 12, 2013November 19, 2013November 26, 2013December 03, 2013December 10, 2013December 17, 2013December 24, 2013January 07, 2014January 14, 2014January 21, 2014January 28, 2014February 04, 2014February 11, 2014February 18, 2014February 25, 2014March 04, 2014March 11, 2014March 18, 2014March 25, 2014April 01, 2014April 08, 2014April 15, 2014April 22, 2014April 29, 2014May 06, 2014May 13, 2014May 20, 2014May 27, 2014June 03, 2014June 10, 2014June 17, 2014June 24, 2014July 01, 2014July 08, 2014July 15, 2014July 22, 2014July 29, 2014August 05, 2014August 12, 2014August 19, 2014August 26, 2014September 02, 2014September 09, 2014September 16, 2014September 23, 2014September 30, 2014October 07, 2014October 14, 2014October 21, 2014October 28, 2014November 04, 2014November 11, 2014November 18, 2014November 25, 2014December 02, 2014December 09, 2014December 16, 2014December 23, 2014December 30, 2014January 06, 2015January 13, 2015January 20, 2015January 27, 2015February 03, 2015February 10, 2015February 17, 2015February 24, 2015March 02, 2015March 09, 2015March 16, 2015March 23, 2015March 30, 2015April 06, 2015April 13, 2015April 20, 2015April 27, 2015May 04, 2015May 11, 2015May 18, 2015May 25, 2015June 01, 2015June 08, 2015June 15, 2015June 22, 2015June 29, 2015July 06, 2015July 13, 2015July 20, 2015July 27, 2015August 03, 2015August 10, 2015August 17, 2015August 24, 2015September 07, 2015September 14, 2015September 21, 2015September 28, 2015October 05, 2015October 12, 2015October 19, 2015October 26, 2015November 02, 2015November 09, 2015November 16, 2015November 23, 2015November 30, 2015December 07, 2015December 14, 2015December 21, 2015December 28, 2015January 04, 2016January 11, 2016January 18, 2016January 25, 2016February 01, 2016February 08, 2016February 15, 2016February 22, 2016February 29, 2016March 07, 2016March 14, 2016March 21, 2016March 28, 2016April 04, 2016April 11, 2016April 18, 2016April 25, 2016May 02, 2016May 09, 2016May 16, 2016May 23, 2016May 30, 2016June 06, 2016June 13, 2016June 20, 2016June 27, 2016July 04, 2016July 11, 2016July 18, 2016July 25, 2016August 01, 2016August 08, 2016August 15, 2016August 22, 2016August 29, 2016September 05, 2016September 12, 2016September 19, 2016September 26, 2016October 03, 2016October 10, 2016October 17, 2016October 24, 2016October 31, 2016November 07, 2016November 14, 2016November 21, 2016November 28, 2016December 05, 2016December 12, 2016December 19, 2016December 26, 2016January 02, 2017January 09, 2017January 16, 2017January 23, 2017January 30, 2017February 06, 2017February 13, 2017February 20, 2017February 27, 2017March 06, 2017March 13, 2017March 20, 2017March 27, 2017April 03, 2017April 10, 2017April 17, 2017April 24, 2017May 01, 2017May 08, 2017May 15, 2017May 22, 2017May 29, 2017June 05, 2017June 12, 2017June 19, 2017June 26, 2017July 03, 2017July 10, 2017July 17, 2017July 24, 2017August 07, 2017August 14, 2017August 21, 2017August 28, 2017September 04, 2017September 11, 2017September 18, 2017September 25, 2017October 02, 2017October 09, 2017October 16, 2017October 23, 2017October 30, 2017November 06, 2017November 13, 2017November 20, 2017November 27, 2017December 04, 2017December 11, 2017December 18, 2017December 25, 2017January 01, 2018January 08, 2018January 15, 2018January 22, 2018January 29, 2018February 05, 2018February 12, 2018February 19, 2018February 26, 2018March 05, 2018March 12, 2018March 19, 2018March 26, 2018April 02, 2018April 09, 2018April 16, 2018April 23, 2018April 30, 2018May 07, 2018May 14, 2018May 21, 2018May 28, 2018June 04, 2018June 11, 2018June 18, 2018June 25, 2018July 02, 2018July 09, 2018July 16, 2018July 23, 2018July 30, 2018August 06, 2018August 13, 2018August 20, 2018August 27, 2018September 03, 2018September 10, 2018September 17, 2018September 24, 2018October 01, 2018October 08, 2018October 15, 2018October 22, 2018October 29, 2018November 05, 2018November 12, 2018November 19, 2018November 26, 2018December 03, 2018December 10, 2018December 17, 2018December 24, 2018January 07, 2019January 14, 2019January 21, 2019January 28, 2019February 04, 2019February 11, 2019February 18, 2019February 25, 2019March 04, 2019March 11, 2019March 18, 2019March 25, 2019April 01, 2019April 08, 2019April 15, 2019April 22, 2019April 29, 2019May 06, 2019May 13, 2019May 20, 2019May 27, 2019June 03, 2019June 10, 2019June 17, 2019June 24, 2019July 01, 2019July 08, 2019July 15, 2019July 22, 2019July 29, 2019August 05, 2019August 12, 2019August 19, 2019August 26, 2019September 02, 2019September 09, 2019September 16, 2019September 23, 2019September 30, 2019October 07, 2019October 14, 2019October 21, 2019October 28, 2019November 04, 2019November 11, 2019November 18, 2019November 25, 2019December 02, 2019December 09, 2019December 16, 2019December 23, 2019December 30, 2019January 06, 2020January 13, 2020January 20, 2020January 27, 2020February 03, 2020February 10, 2020February 17, 2020February 24, 2020March 02, 2020March 09, 2020March 16, 2020March 23, 2020March 30, 2020April 06, 2020April 13, 2020April 20, 2020April 27, 2020May 04, 2020May 11, 2020May 18, 2020May 25, 2020June 01, 2020June 08, 2020June 15, 2020June 22, 2020June 29, 2020July 06, 2020July 13, 2020July 20, 2020July 27, 2020August 03, 2020August 10, 2020August 17, 2020August 24, 2020September 07, 2020September 14, 2020September 21, 2020September 28, 2020October 05, 2020October 12, 2020October 19, 2020October 26, 2020November 02, 2020November 09, 2020November 16, 2020November 23, 2020November 30, 2020December 07, 2020December 14, 2020December 21, 2020December 28, 2020January 04, 2021January 11, 2021January 18, 2021January 25, 2021February 01, 2021February 08, 2021February 15, 2021February 22, 2021February 29, 2021March 07, 2021March 14, 2021March 21, 2021March 28, 2021April 04, 2021April 11, 2021April 18, 2021April 25, 2021May 02, 2021May 09, 2021May 16, 2021May 23, 2021May 30, 2021June 06, 2021June 13, 2021June 20, 2021June 27, 2021July 04, 2021July 11, 2021July 18, 2021July 25, 2021August 01, 2021August 08, 2021August 15, 2021August 22, 2021August 29, 2021September 05, 2021September 12, 2021September 19, 2021September 26, 2021October 03, 2021October 10, 2021October 17, 2021October 24, 2021October 31, 2021November 07, 2021November 14, 2021November 21, 2021November 28, 2021December 05, 2021December 12, 2021December 19, 2021December 26, 2021January 02, 2022January 09, 2022January 16, 2022January 23, 2022January 30, 2022February 06, 2022February 13, 2022February 20, 2022February 27, 2022March 06, 2022March 13, 2022March 20, 2022March 27, 2022April 03, 2022April 10, 2022April 17, 2022April 24, 2022May 01, 2022May 08, 2022May 15, 2022May 22, 2022May 29, 2022June 05, 2022June 12, 2022June 19, 2022June 26, 2022July 03, 2022July 10, 2022July 17, 2022July 24, 2022August 07, 2022August 14, 2022August 21, 2022August 28, 2022September 04, 2022September 11, 2022September 18, 2022September 25, 2022October 02, 2022October 09, 2022October 16, 2022October 23, 2022October 30, 2022November 06, 2022November 13, 2022November 20, 2022November 27, 2022December 04, 2022December 11, 2022December 18, 2022December 25, 2022January 01, 2023January 08, 2023January 15, 2023January 22, 2023January 29, 2023February 05, 2023February 12, 2023February 19, 2023February 26, 2023March 05, 2023March 12, 2023March 19, 2023March 26, 2023April 02, 2023April 09, 2023April 16, 2023April 23, 2023April 30, 2023May 07, 2023May 14, 2023May 21, 2023May 28, 2023June 04, 2023June 11, 2023June 18, 2023June 25, 2023July 02, 2023July 09, 2023July 16, 2023July 23, 2023July 30, 2023August 06, 2023August 13, 2023August 20, 2023August 27, 2023September 03, 2023September 10, 2023September 17, 2023September 24, 2023October 01, 2023October 08, 2023October 15, 2023October 22, 2023October 29, 2023November 05, 2023November 12, 2023November 19, 2023November 26, 2023December 03, 2023December 10, 2023December 17, 2023December 24, 2023January 07, 2024January 14, 2024January 21, 2024January 28, 2024February 04, 2024February 11, 2024February 18, 2024February 25, 2024March 04, 2024March 11, 2024March 18, 2024March 25, 2024April 01, 2024April 08, 2024April 15, 2024April 22, 2024April 29, 2024May 06, 2024May 13, 2024May 20, 2024May 27, 2024June 03, 2024June 10, 2024June 17, 2024June 24, 2024July 01, 2024July 08, 2024July 15, 2024July 22, 2024July 29, 2024August 05, 2024August 12, 2024August 19, 2024August 26, 2024September 02, 2024September 09, 2024September 16, 2024September 23, 2024September 30, 2024October 07, 2024October 14, 2024October 21, 2024October 28, 2024November 04, 2024November 11, 2024November 18, 2024November 25, 2024December 02, 2024December 09, 2024December 16, 2024December 23, 2024December 30, 2024January 06, 2025January 13, 2025January 20, 2025January 27, 2025February 03, 2025February 10, 2025February 17, 2025February 24, 2025March 02, 2025March 09, 2025March 16, 2025March 23, 2025March 30, 2025April 06, 2025April 13, 2025April 20, 2025April 27, 2025May 04, 2025May 11, 2025May 18, 2025May 25, 2025June 01, 2025June 08, 2025June 15, 2025June 22, 2025June 29, 2025July 06, 2025July 13, 2025July 20, 2025July 27, 2025August 03, 2025August 10, 2025August 17, 2025August 24, 2025September 07, 2025September 14, 2025September 21, 2025September 28, 2025October 05, 2025October 12, 2025October 19, 2025October 26, 2025November 02, 2025November 09, 2025November 16, 2025November 23, 2025November 30, 2025December 07, 2025December 14, 2025December 21, 2025December 28, 2025January 04, 2026January 11, 2026January 18, 2026January 25, 2026February 01, 2026February 08, 2026February 15, 2026February 22, 2026February 29, 2026March 07, 2026March 14, 2026March 21, 2026March 28, 2026April 04, 2026April 11, 2026April 18, 2026April 25, 2026May 02, 2026May 09, 2026May 16, 2026May 23, 2026May 30, 2026June 06, 2026June 13, 2026June 20, 2026June 27, 2026July 04, 2026July 11, 2026July 18, 2026July 25, 2026August 01, 2026August 08, 2026August 15, 2026August 22, 2026August 29, 2026September 05, 2026September 12, 2026September 19, 2026September 26, 2026October 03, 2026October 10, 2026October 17, 2026October 24, 2026October 31, 2026November 07, 2026November 14, 2026November 21, 2026November 28, 2026December 05, 2026December 12, 2026December 19, 2026December 26, 2026January 02, 2027January 09, 2027January 16, 2027January 23, 2027January 30, 2027February 06, 2027February 13, 2027February 20, 2027February 27, 2027March 06, 2027March 13, 2027March 20, 2027March 27, 2027April 03, 2027April 10, 2027April 17, 2027April 24, 2027May 01, 2027May 08, 2027May 15, 2027May 22, 2027May 29, 2027June 05, 2027June 12, 2027June 19, 2027June 26, 2027July 03, 2027July 10, 2027July 17, 2027July 24, 2027August 07, 2027August 14, 2027August 21, 2027August 28, 2027September 04, 2027September 11, 2027September 18, 2027September 25, 2027October 02, 2027October 09, 2027October 16, 2027October 23, 2027October 30, 2027November 06, 2027November 13, 2027November 20, 2027November 27, 2027December 04, 2027December 11, 2027December 18, 2027December 25, 2027January 01, 2028January 08, 2028January 15, 2028January 22, 2028January 29, 2028February 05, 2028February 12, 2028February 19, 2028February 26, 2028March 05, 2028March 12, 2028March 19, 2028March 26, 2028April 02, 2028April 09, 2028April 16, 2028April 23, 2028April 30, 2028May 07, 2028May 14, 2028May 21, 2028May 28, 2028June 04, 2028June 11, 2028June 18, 2028June 25, 2028July 02, 2028July 09, 2028July 16, 2028July 23, 2028July 30, 2028August 06, 2028August 13, 2028August 20, 2028August 27, 2028September 03, 2028September 10, 2028September 17, 2028September 24, 2028October 01, 2028October 08, 2028October 15, 2028October 22, 2028October 29, 2028November 05, 2028November 12, 2028November 19, 2028November 26, 2028December 03, 2028December 10, 2028December 17, 2028December 24, 2028January 07, 2029January 14, 2029January 21, 2029January 28, 2029February 04, 2029February 11, 2029February 18, 2029February 25, 2029March 04, 2029March 11, 2029March 18, 2029March 25, 2029April 01, 2029April 08, 2029April 15, 2029April 22, 2029April 29, 2029May 06, 2029May 13, 2029May 20, 2029May 27, 2029June 03, 2029June 10, 2029June 17, 2029June 24, 2029July 01, 2029July 08, 2029July 15, 2029July 22, 2029July 29, 2029August 05, 2029August 12, 2029August 19, 2029August 26, 2029September 02, 2029September 09, 2029September 16, 2029September 23, 2029September 30, 2029October 07, 2029October 14, 2029October 21, 2029October 28, 2029November 04, 2029November 11, 2029November 18, 2029November 25, 2029December 02, 2029December 09, 2029December 16, 2029December 23, 2029December 30, 2029January 06, 2030January 13, 2030January 20, 2030January 27, 2030February 03, 2030February 10, 2030February 17, 2030February 24, 2030March 02, 2030March 09,



**Resource Allocation:**

Double Click on the required task. Task Editing Window will pop-up. You can Add/Remove new resource and allocate hours for the same in this window.



# E-mail Notifications And Alerts

## E-mail Notifications and Alerts

### OVERVIEW

A variety of e-mail notifications and alerts can be configured to be automatically sent to employees and managers when managers and employees are required to perform certain duties such as submitting or approving time and expenses.

### Available E-mail Notifications include:

- **Send e-mail to approving managers when time/expenses are awaiting their approval.**
  - To help with getting time and expenses approved in a timely manner, you can setup notifications so the approving managers are sent an e-mail whenever time/expenses are awaiting their approval. Configure notifications to send one daily (batch) e-mail containing summary information for all sheets awaiting their approval.
- **Send e-mail to employees when time/expenses have been rejected by their manager.**
  - When a manager rejects time or expenses submitted by employees, there is usually a need to have the issue quickly resolved. By instantly sending e-mails to the employees, that alert them to the rejected time/expenses, both parties (approving managers and employees) can resolve any problems in an effective manner.
- **Send e-mail to employees detailing their project assignments.**
  - Assignment notifications inform the selected users about the projects and tasks that are assigned to them.
- **Send e-mail to employees when their timesheet are incomplete**
  - Incomplete Timesheet Notifications alert the selected users when their timesheet is incomplete based on a specified number of hours.

### E-mail settings

Following settings are required to setup e-mail notifications from TimeLive, if you are using self-hosted TimeLive version.

- a. Defining of **[SMTP Server]**, **[SMTP Username]** and **[SMTP user's password]** in system setting page.

[\(Click to launch detail help about TimeLive System Settings\)](#)

- b. Download this free SMTP test utility and test your SMTP Settings using this utility on same server where you have TimeLive installed.

[http://download.cnet.com/SMTP-Test/3000-2383\\_4-10592177.html](http://download.cnet.com/SMTP-Test/3000-2383_4-10592177.html)

- c. Updating of [**Application URL**] with correct TimeLive self hosted version URL in system setting page.

[\(Click to launch detail help about TimeLive System Settings\)](#)

- d. Updating of [**From E-mail address**] and [**From E-mail address display name**] in [**Admin Options**]-->[**Preferences**] while logged-in using admin user in TimeLive.

# System Setup

## Launching Admin Options:

System administrator can launch administration page by clicking on **[Admin Options]**. Through **[Admin Options]**, administrator can setup these things of TimeLive.

## System settings which can be configured using Admin Options:

1. [Organization branches / locations](#)
2. [Departments](#)
3. [Employee Setup](#)
4. [External Users](#)
5. [Roles](#)
6. [Manage Terminology](#)
7. [Working Days](#)
8. [Security Roles / permissions](#)
9. [Billing Type](#)
10. [Custom Fields](#)
11. [Expense Types & Expenses](#)
12. [Currencies](#)
13. [Tax Code](#)
14. [Payment Method](#)
15. [Application Preferences](#)
16. [Project Templates](#)
17. [Holidays](#)
18. [Email Notification Preferences](#)
19. [External Users](#)
20. [Approvals Workflow Setup](#)
21. [Time Entry Archive](#)
22. Expense Entry Archive
23. [CSV Import / Export of TimeLive data](#)
24. Cost Center Management
25. [Work Types](#)
26. Disable Account.

Administration

Organization Setup



Locations



Departments



Roles



Employee Types



External Users

Application Setup



Email Notification Preferences



Role Permissions



Manage Terminology



Preferences



Status Type



Custom Field



Feature Management



License Manager

Timesheet Setup



Timesheet Period Types



Time Entry Archive



Holiday Types



Holidays



Absence Type



Work Types



Cost Center



Working Days



Approvals

Project / Task Setup



Task Types



Priorities



Project Types



Project Templates

Time Off Setup



Time Off Types



Time Off Policies

Expense Setup



Expense Types



Expenses



Payment Method



Expense Entry Archive

Currencies and Tax



Currencies



Tax Code



Tax Zone

Billing Setup



Billing Types

Import / Export



Import / Export  
CSV/Quickbooks  
/ Microsoft  
Project

Account Setup

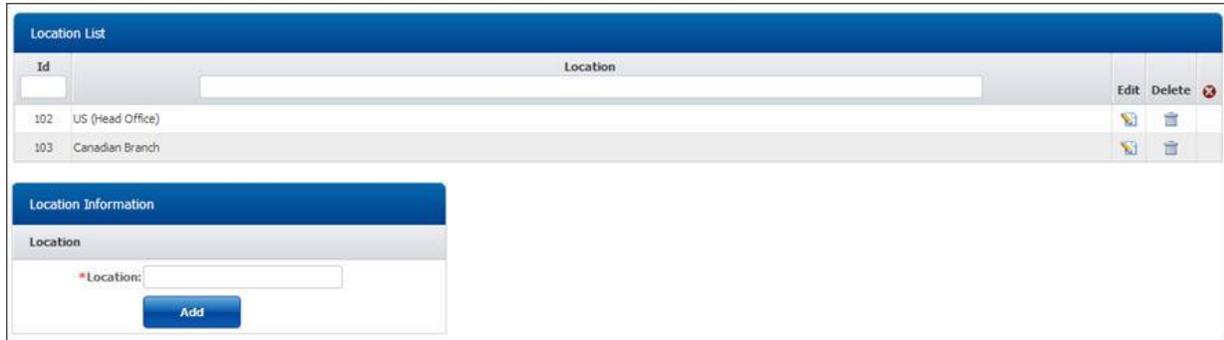


## Branches / locations setup

System administrator can setup organization branches / location using **[Admin Options] --> [Locations]**

### Setting up locations:

By default, a default location with name "Default Location" on new account add. Administrator can rename this default location and can also add new locations.



The screenshot shows a web application interface for managing locations. At the top, there is a blue header bar labeled "Location List". Below this is a table with two columns: "Id" and "Location". The table contains two rows: one with "102" and "US (Head Office)", and another with "103" and "Canadian Branch". To the right of each row are icons for "Edit" and "Delete". Below the table is a "Location Information" form. It has a "Location" label and a text input field with a red asterisk indicating it is required. Below the input field is an "Add" button.

#### Renaming "Default Locations":

1. Click on **[Edit]** link on default location record.
2. Enter new name of default location.
3. Click on **[Update]** to update this change.

#### Adding new locations:

To add new location, follow these instructions.

1. Enter new location name in location in **"Location Information"** form.
2. Click on **[Add]** to add this location.

#### Deleting Location:

1. In **[Location List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **[Yes]** on delete confirmation dialog

#### Editing Location:

1. In **[Location List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Location Information]** form.
3. Click on **[Update]** button to update this record.

## Departments setup

Department is a division of employees that may define the hierarchical structure, geographic regions, or functional groups within your organization.

If you plan to implement departments, you should define your departments before setting up your employees, allowing you to add an employee and assign the employee a department in one easy step. System administrator can setup organization departments using **[Admin Options] --> [Departments]**

## Setting up Departments:

By default, a default department name "Default Department" on new account add. Administrator can rename this default department and can also add new departments.

The screenshot shows a web interface for managing departments. At the top is a 'Department List' table with columns for Id, Code, Department Name, Edit, and Delete. Below the table is a 'Department Information' form with fields for Department Code and Department Name, and an 'Add' button.

| Id  | Code  | Department Name   | Edit | Delete |
|-----|-------|-------------------|------|--------|
| 125 | ADMIN | Administration    |      |        |
| 127 | DEV   | Development       |      |        |
| 128 | QA    | Quality Assurance |      |        |

**Department Information**

Department

\* Department Code:

\* Department Name:

## Renaming "Default Department":

1. Click on **[Edit]** link on default department record.
2. Enter new department name and department code of default department.
3. Click on **[Update]** to update this change.

## Adding new department:

To add new department, follow these instructions.

1. Enter new department code and name in **"Department Information"** form.
2. Click on **[Add]** to add this department.

## Deleting Department:

1. In **[Department List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **[Yes]** on delete confirmation dialog

## Editing Department:

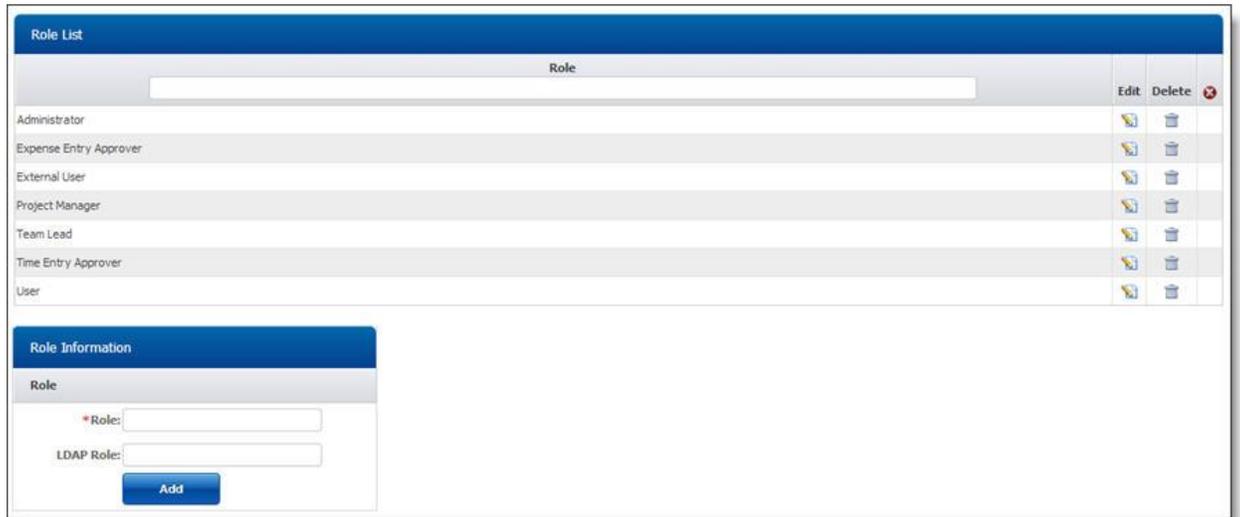
1. In **[Department List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Department Information]** form.
3. Click on **[Update]** button to update this record.

## Roles setup

Roles are used to identify types of work that are charged at specific rates. A role can describe a specific action/function or a level of expertise within the project team. Roles are initially created outside of the project, and then assigned to the project and appropriate team members. System administrator can setup application roles using **[Admin Options] --> [Roles]**.

## Setting up Roles:

By default, TimeLive application creates 4 default roles which TimeLive application used internally for its different functions. Administrator can add new roles based on their own organization requirements.



## Adding new Roles:

To add new role, follow these instructions.

1. Enter new role name in "**Role Information**" form.
2. Click on **[Add]** to add this role.

## Deleting Role:

1. In **[Role List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **[Yes]** on delete confirmation dialog

## Editing Role:

1. In **[Role List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Role Information]** form.
3. Click on **[Update]** button to update this record.

## Task Type setup

Task types is an identity of a task representing of particular task group. It can be different for different industries and organizations. TimeLive provides few pre-defined tasks with option of adding your own required task types in system.

System administrator can setup task type using [Admin Options] --> [Task Types]

| Task Type List |       |  |      |        |
|----------------|-------|--|------|--------|
| Task Type      |       |  | Edit | Delete |
| 128            | Task  |  |      |        |
| 129            | Bug   |  |      |        |
| 130            | Issue |  |      |        |

**Task Type Information**

Task Type

\*Task Type:

## Adding new task type:

To add new task type:

1. Enter new task type in "Task Type Information" form.
2. Click on [Add] to add this department.

## Deleting Task type:

1. In [Task Type List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

## Editing Task Type:

1. In [Task Type List], click on [Edit] link of record which you want to modify.
2. Update your required modification in [Task Type Information] form.
3. Click on [Update] button to update this record.

## Priorities setup

Priorities setup allow system administrator to create own custom priorities of tasks. TimeLive provide few pre-defined priorities which can be rename or edited according to organization needs. System administrator can setup priorities using [Admin Options] --> [Priorities]

| Priority List |        |  |      |        |
|---------------|--------|--|------|--------|
| Priority      |        |  | Edit | Delete |
| 172           | Urgent |  |      |        |
| 173           | High   |  |      |        |
| 174           | Medium |  |      |        |
| 175           | Low    |  |      |        |

**Priority Information**

Priority

\*Priority:

\*Priority Order:

## Adding new priority:

To add new task type:

1. Enter new priority in "Priority Information" form which you want to add.
2. Click on [Add] to add this priority in timelive system.

## Deleting priority:

1. In [Priorities List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

## Editing priority:

1. In [Priorities List], click on [Edit] link of record which you want to modify.
2. Update your required modification in [Priority Information] form.
3. Click on [Update] button to update this record.

## Role Permissions setup

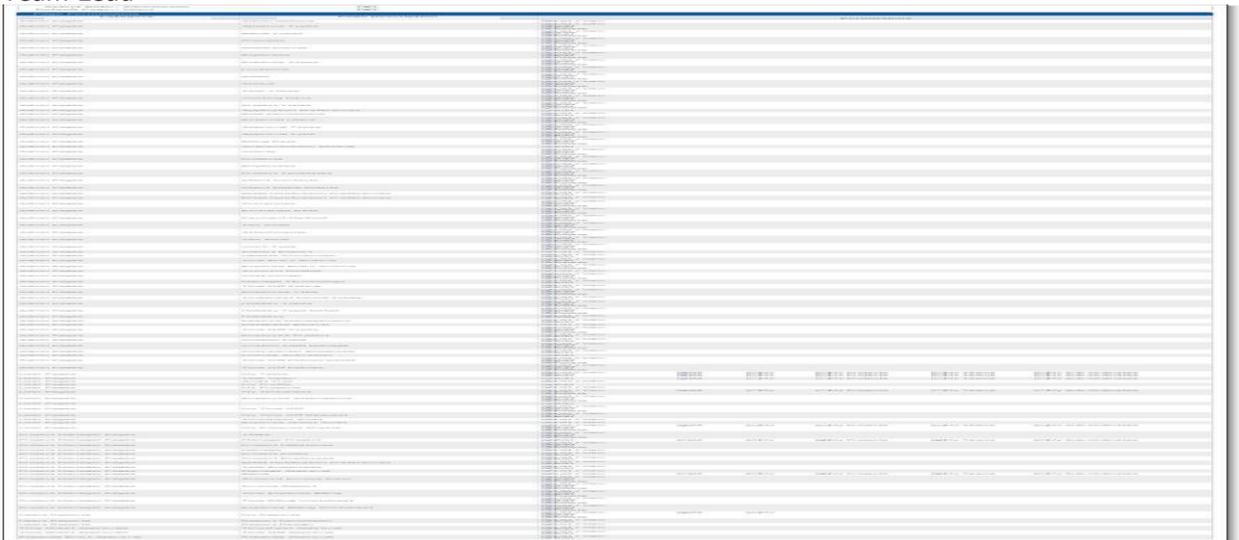
Role Permission are used to define the activities and features users can access. Each role has a name and list of actions. The administrator assigns roles to each user when adding new employee.

Role permissions allow you to restrict or expand a user's access to TimeLive system. Consider each role carefully before assigning actions to that role.

TimeLive provide 4 pre-defined security roles which can be customized through role permission. Also administrator can create their own custom roles and can assign their own required permissions.

## Pre-defined roles:

1. Administrator
2. User
3. Project Manager
4. Team Lead



The image shows a screenshot of a web application interface, likely for role permissions. It features a table with multiple columns and rows. The columns are labeled with various system actions such as 'VIEW', 'EDIT', 'DELETE', 'ADD', 'UPDATE', and 'DELETE ALL PERMISSIONS'. The rows represent different roles, including 'Administrator', 'User', 'Project Manager', and 'Team Lead'. The table is partially obscured by a vertical scrollbar on the right side, indicating a large number of rows. The interface has a clean, professional look with a white background and blue accents.

Each TimeLive functionality can be customize using 4 level of access permissions.

1. List / View (Only view permission)
2. Add (Add permission)
3. Edit (Edit permission)
4. Delete (Delete permission)

## Updating permission of role:

To update permission of a specific role,

1. select that role in role dropdown. And then modify your required permission sets for that particular role.
2. Click on [update] to update these settings.

## Billing Types setup

Billing types are system configurable billing types which you can define. Billing Types setup allow system administrator to create own billing types. TimeLive provide few pre-defined billing types which can be rename or edited according to organization needs.

There are two types of billing category which you can setup using billing type setup.

1. Employee Bill Types
  - Hourly
  - Monthly
2. Project / Client
  - Per Hour
  - Fixed Bid

System administrator can setup billing types using [Admin Options] --> [Billing Types]

The screenshot shows a web interface for managing billing types. At the top is a table titled "Billing Type List" with columns for Id, Billing Type, Billing Category, Edit, and Delete. Below the table is a form titled "Billing Type Information" with fields for Billing Type and Billing Category, and an Add button.

| Id  | Billing Type | Billing Category | Edit | Delete |
|-----|--------------|------------------|------|--------|
| 178 | Hourly       | Employee         |      |        |
| 179 | Monthly      | Employee         |      |        |
| 180 | Per Hour     | Project/Client   |      |        |
| 181 | Fixed Bid    | Project/Client   |      |        |

**Billing Type Information**

Billing Type

\*Billing Type:

\*Billing Category: Employee

## Adding new billing type:

To add new billing type:

1. Enter new billing type in "Billing Type" form which you want to add.
2. Select billing category (select Employee if you are defining billing type of employee billing. Select Project/Client if you want to add billing type for project.
3. Click on [Add] to add this billing in timelive system.

## Deleting billing type:

1. In [Billing type List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

## Editing billing type:

1. In [Billing Type List], click on [Edit] link of record which you want to modify.
2. Update your required modification in [Billing Type Information] form.
3. Click on [Update] button to update this record.

## Absence Type Setup

Absence types are the different type of employee absence reasons, which can be configure using timelive absence type setup. TimeLive provide few pre-defined absence types. Administrator can create their own absence type based on their own organization needs.

System administrator can setup absence types using [Admin Options] --> [Absence Types]

The screenshot displays two web forms. The top form, titled "Absence Type List", features a table with columns for "Id" and "Absence Description". It lists three entries: 140 Sick Leave, 141 Holiday, and 142 Vacation. Each entry has "Edit" and "Delete" icons. The bottom form, titled "Absence Type Information", contains a field for "Absence Description" with a red asterisk indicating it is required, and an "Add" button below it.

## Adding new Absence type:

To add new absence type:

1. Enter new absence type in "Absence Type Information" form which you want to add.
2. Click on [Add] to add this absence type in timelive system.

## Deleting Absence Type:

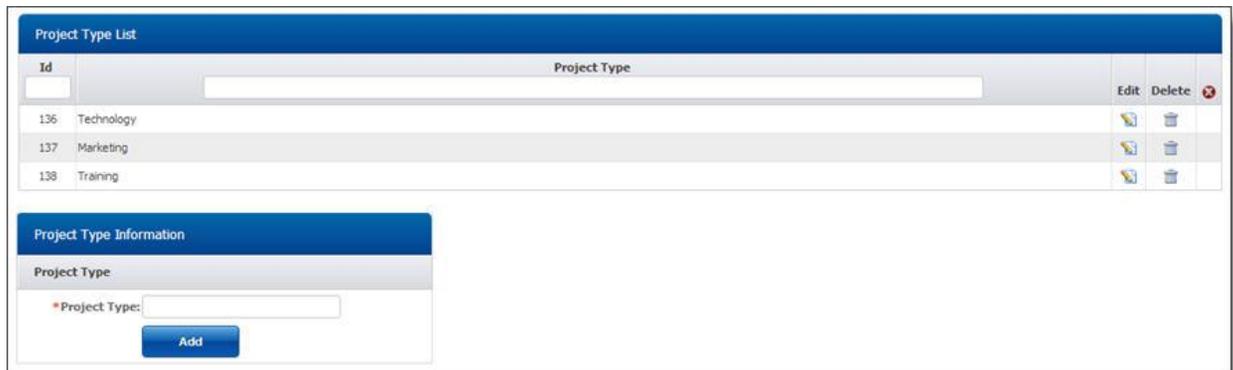
1. In [Absence Type List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

## Editing Absence Type:

1. In [Absence Type List], click on [Edit] link of record which you want to modify.
2. Update your required modification in [Absence Type Information] form.
3. Click on [Update] button to update this record.

## Project Types Setup

Project types are the different categories of projects which an organization is executing. This depends upon organization to organization. For example, a software consulting company can have different types of projects like "Web Development", "Application Development" etc. System administrator can setup Project Types [Admin Options] --> [Project Types]



## Adding new Project type:

To add new project type:

1. Enter new project type in "Project Type Information" form which you want to add.
2. Click on [Add] to add this project type in TimeLive system.

## Deleting Project Type:

1. In [Project Type List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

## Editing Project Type:

1. In [Project Type List], click on [Edit] link of record which you want to modify.
2. Update your required modification in [Project Type Information] form.
3. Click on [Update] button to update this record.

## Status Types setup

Status types are different types of status codes which TimeLive users can use to monitor their different types of project or task states from start to finish. Different status type can be "Open", "In Progress", "Closed" etc.

There are three types of status types which you can configure in Status Types setup:

1. Task (Status code of project tasks)
2. Project (Status code of projects)
3. Employee (Status code of employee)

System administrator can setup Status using [Admin Options] --> [Status]

The screenshot displays the 'Status List' interface. At the top, there is a blue header with the text 'Status List'. Below this is a table with the following columns: 'Id', 'Status Type', 'Status', 'Edit', and 'Delete'. The table contains 10 rows of data:

| Id  | Status Type | Status      | Edit        | Delete        |
|-----|-------------|-------------|-------------|---------------|
| 563 | Task        | Started     | [Edit Icon] | [Delete Icon] |
| 564 | Task        | OnHold      | [Edit Icon] | [Delete Icon] |
| 565 | Task        | In Progress | [Edit Icon] | [Delete Icon] |
| 566 | Task        | Completed   | [Edit Icon] | [Delete Icon] |
| 567 | Project     | Started     | [Edit Icon] | [Delete Icon] |
| 568 | Project     | OnHold      | [Edit Icon] | [Delete Icon] |
| 569 | Project     | In Progress | [Edit Icon] | [Delete Icon] |
| 570 | Project     | Cancelled   | [Edit Icon] | [Delete Icon] |
| 571 | Project     | Completed   | [Edit Icon] | [Delete Icon] |
| 574 | Account     | Trial       | [Edit Icon] | [Delete Icon] |

Below the table is a 'Status Information' form. It has a blue header with the text 'Status Information'. The form contains a dropdown menu for 'Status Type' with 'Account' selected, a text input field for 'Status', and an 'Add' button.

## Adding new Status:

To add new status:

1. Select status type (select Task, if you are going to add status of a task. Select Project if you want to add status type for project. Select Employee, if you want to add new status for employees)
2. Enter new status type in "Status Information" form which you want to add.
3. Click on [Add] to add this status in TimeLive system.

## Deleting Status:

1. In [Status List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

## Editing Status:

1. In [Status List], click on [Edit] link of record which you want to modify.
2. Update your required modification in [Status Information] form.
3. Click on [Update] button to update this record.

## Employee setup

To provide an employee or other person access to TimeLive, you must add them as an Employee in TimeLive. Typically an employee record should be created in TimeLive to allow that employee to enter perform their daily operations through TimeLive including task management, time entry, expense entry, project management etc.

1. Administrator also define role of every employee through which individual employees get their restricted TimeLive access according to their role permission defined in Role Permissions.
2. TimeLive also required billing rate of every employee through which TimeLive calculate project / task cost for billing purpose.

- Administrator also define timelive login password at time of new employee add. Later employee can change their own password by doing login in system using.
- Employee should be assign in project to execute any activity for that particular project.

| Employee List |      |            |           |                   |                  |      |        |  |          |          |                                      |
|---------------|------|------------|-----------|-------------------|------------------|------|--------|--|----------|----------|--------------------------------------|
| Id            | Code | First Name | Last Name | Department Name   | Location         | Edit | Delete |  |          |          |                                      |
| 129           | 001  | John       | Benson    | Administration    | US (Head Office) |      |        |  | Time Off | Projects | Cost Center <input type="checkbox"/> |
| 130           | 002  | Bob        | Bingham   | Development       | US (Head Office) |      |        |  | Time Off | Projects | Cost Center <input type="checkbox"/> |
| 131           | 003  | Mike       | Boltz     | Development       | US (Head Office) |      |        |  | Time Off | Projects | Cost Center <input type="checkbox"/> |
| 132           | 004  | Ryan       | Culver    | Development       | US (Head Office) |      |        |  | Time Off | Projects | Cost Center <input type="checkbox"/> |
| 133           | 005  | Bob        | Foppiano  | Development       | US (Head Office) |      |        |  | Time Off | Projects | Cost Center <input type="checkbox"/> |
| 134           | 006  | Brian      | Gardner   | Development       | US (Head Office) |      |        |  | Time Off | Projects | Cost Center <input type="checkbox"/> |
| 148           | 007  | Rich       | Jackson   | Quality Assurance | US (Head Office) |      |        |  | Time Off | Projects | Cost Center <input type="checkbox"/> |
| 149           | 008  | John       | Ramos     | Development       | US (Head Office) |      |        |  | Time Off | Projects | Cost Center <input type="checkbox"/> |
| 150           | 009  | Steve      | Elsworth  | Development       | Canadian Branch  |      |        |  | Time Off | Projects | Cost Center <input type="checkbox"/> |
| 151           | 010  | Jackie     | Alves     | Development       | US (Head Office) |      |        |  | Time Off | Projects | Cost Center <input type="checkbox"/> |

1 2

**Add** **Delete Selected**

## Employee Information field:

These are the fields which are required to be entered for entering new employee. There are three types of fields available in employee form.

- Personal Information
- Login Information
- Billing Rate information

## Personal Fields:

- Name prefix
- First Name
- Middle Name
- Last Name
- Address Line 1
- Address Line 2
- State
- City
- Zip
- Country
- Home phone no
- Work phone no
- Time zone

## Login Information fields:

- Login email address
- Password / verify password
- Role (Role specify which features of TimeLive the user can access. Administrator can create new role as well as can customize role security using Role Permission option in Admin Options section is initially available in read-only mode, and displays a list of permissions already assigned to the user.

- Department (Department field of the user profile indicates which department the user is assigned to)
- Location (Location field of the user profile indicate which organization location the user is assigned to)

## **Billing Fields**

- Billing Currency
- Billing Type
- Billing Rate
- Billing Rate start date

## **Adding new employee:**

To add new employee, follow these instructions.

1. Enter employee personal information, login information and billing information in employee information form.
2. Click on [Add] to add this employee.

## **Deleting Employee:**

1. In [Employee List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

## **Editing Employee:**

1. In [Employee List], click on [Edit] link of record which you want to modify.
2. Update your required modification in [Employee Information] form.
3. Click on [Update] button to update this record.

## **External Users setup**

External users are typically external to the organization and, as a result, are much more limited in their access. External users are often created for those users who are required to approve time information and review report data on behalf of a Client.

External users can be assigned as a representative/approver for projects associated with the client. Client approvers can approve timesheets in which time is entered against the client's projects (client approver sees only the lines containing their projects).

System administrator can setup [External users] through [Admin Options] --> [External Users]

| External User List |           |                             |                    |      |        |
|--------------------|-----------|-----------------------------|--------------------|------|--------|
| First Name         | Last Name | Email Address               | Client Name        | Edit | Delete |
| Darrell            | Packard   | darrellpackard@livetecs.com | Team Alliance Inc. |      |        |

**External User Information**

**Personal Information**

Prefix: Mr.

\* First Name:  Middle Name:

\* Last Name:  \* External User Client:

Time Zone:

**Login:**

\* Login Email Address:

\* Password:  \* Verify Password:

Disabled:

## Adding new External User:

To add new external user:

1. Enter external user personal information in "Personal Information Section".
2. Select client whose representative/approver is this external employee.
3. Enter [Login information] in login section
4. Enter Role as [External User]
5. Click on [Add] to add this external user in timelive system.

## Deleting External User:

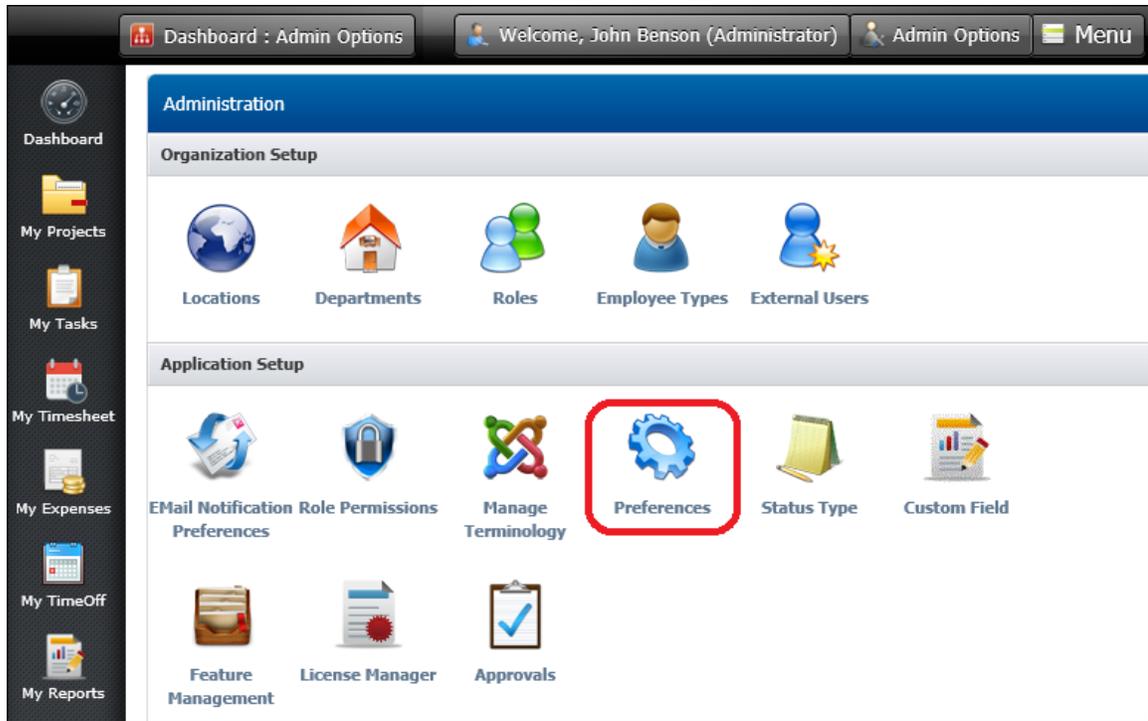
1. In [External User List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

## Editing External User:

1. In [External Users List], click on [Edit] link of record which you want to modify.
2. Update your required modification in [External User Information] form.
3. Click on [Update] button to update this record.

## Preferences

Preferences option allow Administrator to setup different application level parameters which are required for their organization. **Admin Options > Preferences**



TimeLive preferences section have nine Sub-sections.

## Organization :

Under **Organization**, Account Information is saved. Administrator can change the data according to the organizational needs along with Time Zone.

## General Preferences :

Options under General Preferences plays pivotal role in setting up account basic settings. Details are as below for each option,

|   |   |
|---|---|
| <b>Enable Password Complexity</b>                         | This option restrict users to input much secure password than simple ones. Password must consists of 6 digits including 1 numeric and 1 special characters if this check is applied |
| <b>Lock Submitted Records</b>                             | This option lock any submitted records in Timesheet, Time Off and Expense. User cannot edit submitted records if this check is applied  |
| <b>Lock In-Approval/Approved Records</b>                  | If this check is applied, all records which are waiting for approval or already approved cannot be edited by user   |
| <b>Use Electronic Signature</b>                           | If this check is applied, user can see his/her Electronic signature on approvals and print paper  |
| <b>Show Additional Department Information in Employee</b> | If this check is applied, Department Code will be included in Department column under Employee Grid   |
| <b>Show Employee Name with Code</b>                       | If this check is applied, All list of employees drop-down will show Employee code along with Employee Name  |
| <b>Show Disable Employees In Report</b>                   | If this check is applied, All report will show disabled employees' list and their records, according to the report  |
| <b>Password Expiry Period</b>                             | Administrator can set the expiry period of employees password. After the expiry period, user must need to change their existing password  |

|   |  |
|---|--|
| <b>Scheduled Email Sent Time</b>                    | Through this field, Administrator can schedule email sending time. It could be <b>09:00</b> or <b>16:00</b>  |
| <b>Session Out Time</b>                             | Due to security risk, Administrator can set minutes after TimeLive session may expire due to inactivity  |
| <b>Page Size</b>                                    | This drop-down, allow user to view number of Records in one page. ( <b>10,20,30,40,50</b> )  |
| <b>From Email Display Name</b>                      | This field allow administrator to change Automatic email sender name according to organization need  |
| <b>From Email Address</b>                           | This field allow administrator to change sender default email address according to its organization  |
| <b>Standard and Formats</b>                         | This drop-down option is crucial as it controls Time, Date and Text format (By default, it is <Auto> which automatically pick culture info from client browser default settings) |
| <b>Show Employee Name By</b>                        | This drop-down allow administrator to use either First Name and Last Name or Last Name and First Name in TimeLive  |
| <b>Company Own Logo &amp; Show Company Own Logo</b> | Through this option, Administrator can upload Company logo to be shown in TimeLive Application and on Prints as well   |

## Invoice Setup :

In this tab, Options related to Invoice can be modified,

The screenshot shows the 'Application Preference' window with the 'Invoice Setup' tab selected. The 'Invoice Information' section contains the following settings:

- Show Project Name In Invoice Report:
- Show Billing Rate In Invoice Report:
- Show Entry Date In Invoice Report:
- Show Employee Name In Invoice Report:
- Show Work Type In Invoice Description:
- Round-Off Tax Value In Invoice:
- Invoice No Prefix:
- Invoice Billing Type: Hours (dropdown menu)
- Invoice Footer:

Buttons for 'Update' and 'Cancel' are located at the bottom right of the window.

|  |   |
|--|---|
| <b>Show Project Name In Invoice Report</b> | Through this check, Project Name will be shown in the generated Invoice |
| <b>Show Billing Rate In Invoice Report</b> | Through this check, Billing Rate of the Project will be shown           |

|  |  |
|--|--|
| <b>Show Entry Date In Invoice Report</b>     | If this check is applied, Entry date will be shown in the Invoice  |
| <b>Show Employee Name In Invoice Report</b>  | If this check is applied, Employee name will reflect in the generated Invoice  |
| <b>Show Work Type In Invoice Description</b> | Through this option, Work Type will reflect in Invoice Description   |
| <b>Round-Off Tax Value In Invoice</b>        | Through this option, Tax Value will be Round Off in the generated Invoice  |
| <b>Invoice No Prefix</b>                     | With this option, Administrator can set Invoice No. Prefix   |
| <b>Invoice Billing Type</b>                  | Through this Drop-Down, Administrator can select between <b>Hours</b> or <b>Days</b> Billing Type                                  |
| <b>Invoice Footer</b>                        | In this Text Box, Administrator can input Footer for the generated Invoice. It would be general as it will reflect in all invoices |

## Task Setup :

Under Task Setup tab, Administrator can set some options which will reflect in Task Grid,

The screenshot shows the 'Application Preference' dialog box with the 'Task Setup' tab selected. Under 'Task Information', there are three settings: 'Show Project Name In Task' with a checkbox, 'Show Client Name In Task' with a checkbox, and 'Sort Task By' with a dropdown menu currently set to 'Deadline Date'. At the bottom right, there are 'Update' and 'Cancel' buttons.

|                                  |   |
|----------------------------------|---|
| <b>Show Project Name In Task</b> | By enabling this check, Project Name will be shown in Task Grid   |
| <b>Show Client Name In Task</b>  | By enabling this check, Client Name will be shown in Task Grid  |
| <b>Sort Task By</b>              | Through this Drop-Down, Administrator have option to sort Task Grid according to <b>Deadline Date</b> or <b>Task ID</b> |

## Project Setup :

Under Project Setup tab, Administrator can set some options which will reflect in Project Grid,

Application Preference

Organization

General Preferences

Invoice Setup

Task Setup

Project Setup

Time Off Setup

Expense Setup

Timesheet Setup

Security

**Project Information**

Auto Generate Project Code:

Show Completed Project In Project List:

Show Client Department In Project:

Include Current Year In Project Code:

Automatically Include Administrator In Project Team:

Show Disable Project In Report:

Project Template Mandatory:

Project Code Prefix:

|  |   |
|--|---|
| <b>Auto Generate Project Code</b>                          | Through this check, Project Code will be generated by System  |
| <b>Show Completed Project In Project List</b>              | If this check is enabled, Completed projects can be shown in Project Grid   |
| <b>Show Client Department In Project</b>                   | By enabling this check, Client Department will appear in Project Grid   |
| <b>Include Current Year In Project Code</b>                | By enabling this check, TimeLive Application will include current year in Project Code. i.e. <b>2016</b> -XXX   |
| <b>Automatically Include Administrator In Project Team</b> | If this check is enabled, Administrator will be automatically be added in every Project during creation. Note: Projects which are already created prior to this check enabled, will not make administrator as team member |
| <b>Show Disable Project In Report</b>                      | Through this check, All Disabled Projects will be shown in Reports and its Drop-Down  |
| <b>Project Template Mandatory</b>                          | If this check is enabled, Administrator/User must select Project Template during Project Creation (See <a href="#">Project Template</a> )   |
| <b>Project Code Prefix</b>                                 | Through this check, Administrator can assign Project Code Prefix for Project  |

## Time Off Setup :

Under Time Off Tab, Administrator can manage few settings of Time Off,

Application Preference

Organization    General Preferences    Invoice Setup    Task Setup    Project Setup    **Time Off Setup**    Expense Setup    Timesheet Setup    Security

Time Off Information

Show TimeOff in Timesheet:

Show Project For TimeOff:

Show Time Off In Days:

TimeOff Status Edit Mode:

Show TimeOff Types By: Account

Update    Cancel

|                                  |   |
|----------------------------------|---|
| <b>Show TimeOff in Timesheet</b> | Through this check, Time Off will be available in My Timesheet for users to input their Time Off                    |
| <b>Show Project for TimeOff</b>  | Through this check, Project selection will be possible while submitting Time Off Request                            |
| <b>Show Time Off in Days</b>     | Through this check, Time Off will be calculated in days with reference to hours set in <a href="#">Working Days</a> |
| <b>TimeOff Status Edit Mode</b>  | If this check is enabled, user can edit their submitted TimeOff data from Time Off Request Page                     |
| <b>Show Timeoff Types By</b>     | This drop-down allow administrator to select between Account wise TimeOff type or Employee Wise                     |

## Expense Setup :

Under Expense Setup Tab, Administrator can enable some additional data fields for Expense Sheet,

Application Preference

Organization    General Preferences    Invoice Setup    Task Setup    Project Setup    Time Off Setup    **Expense Setup**    Timesheet Setup    Security

Expense Information

Show Client In Expense Sheet:

Show Task in Expense Sheet:

Expense Sheet Print Footer:

\_\_\_\_\_  
Consultant Signature

\_\_\_\_\_  
Client Signature

Update    Cancel

|                                     |  |
|-------------------------------------|--|
| <b>Show Client In Expense Sheet</b> | If this check is enabled, user can select Client while creating new Expense Sheet  |
| <b>Show Task in Expense Sheet</b>   | If this check is enabled, user can select Task for which they want to have Expense Sheet                                     |
| <b>Expense Sheet Print Footer</b>   | This Footer will be visible in every Expense Sheet Print. Administrator can change its data according to organizational need |

## **Timesheet Setup :**

Under this option, Administrator can set many functions which TimeLive is offering which will reflect in My Timesheet of all users,

Application Preference

Organization    General Preferences    Invoice Setup    Task Setup    Project Setup    Time Off Setup    Expense Setup    **Timesheet Setup**    Security

Timesheet Information

Show Clock Start/End:

Show Client in Timesheet:

Show Description in Week View:

Show Completed Project in Timesheet:

Show Completed Task in TimeSheet:

Show Work Type in TimeSheet:

Show Cost Center in TimeSheet:

Show Copy Timesheet Button:

Show Copy Activities Button In Timesheet:

Enable Offline Timesheet:

Show "ShowAll" in Approval Popup:

Show Task Percentage In Timesheet:

Calculate Task Percentage Automatically:

Auto Adjust Timesheet:

Number Of Blank Rows in Timesheet:

Timesheet Periods Overdue:

Show Clock Start/End By:

Time Entry Hours Format:

Time Entry Clock Format:

Show Additional Task Information Type in Timesheet:

Show Additional Task Information Type in Timesheet:

Show Additional Project Information Type in Timesheet:

Default Time Entry Mode:

Sort Timesheet By:

Show Cost Center In Timesheet By:

Timesheet Print Footer:

\_\_\_\_\_  
Consultant Signature

\_\_\_\_\_  
Client Signature

|                                      |  |
|--------------------------------------|--|
| <b>Show Clock Start/End</b>          | If this check is enabled, TimeLive allow users to input Start Time and End Time against their task. TimeLive will calculate Hours Spent itself |
| <b>Show Client in Timesheet</b>      | Through this check, Client drop-down will be available for users to select prior to project and task   |
| <b>Show Description in Week View</b> | Normally, Description is in Day View, but if this check is enabled, Description box will appear after entering End                             |

|   |  |
|---|--|
|   | Time/Total Time  |
| <b>Show Completed Project in Timesheet</b>                | In TimeLive, Completed Projects will not appear in Project Drop-Down for selection but this check allows those project to reflect in the drop-down   |
| <b>Show Work Type in Timesheet</b>                        | This feature is very useful. If a user has worked overtime or on Holidays, and have different rates for that, they can select Work type from My Timesheet while entering their Hours Spent   |
| <b>Show Cost Center in Timesheet</b>                      | Through this check, Cost Center drop-down will be available for users to select  |
| <b>Show Copy Timesheet Button</b>                         | This option allow Copy Timesheet Button to be visible in users timesheet (View <a href="#">My Timesheet</a> )  |
| <b>Show Copy Activities Button In Timesheet</b>           | This option allow Copy Activities Button to be visible in users timesheet (View <a href="#">My Timesheet</a> )   |
| <b>Enable Offline Timesheet</b>                           | This option allow Offline Timesheet Button to be visible in users timesheet (View <a href="#">My Timesheet</a> )   |
| <b>Show "Show All" Check in Approval</b>                  | While in Approval, if detail is clicked, Approver can see records which are pertaining to him/her, but if this check is enabled, Approver can view the whole week entry including TimeOffs as well. This will help Approver in monitoring users activities during the week |
| <b>Show Task Percentage in Timesheet</b>                  | This option allow users to input Percentage along with their time spent in that task. Percentage is linked directly to the task  |
| <b>Calculate Task percentage Automatically</b>            | This option automatically calculates task percentage   |
| <b>Auto Adjust Timesheet</b>                              | This option will automatically adjust My Timesheet Layout according to enable fields and their width   |
| <b>Number of Blank Rows in Timesheet</b>                  | This option allow administrator to control number of lines for TimeEntry. <b>By default</b> it is <b>2</b> . When both lines are filled and records are saved, 2 extra blank lines will appear for TimeEntry   |
| <b>Timesheet Period Overdue</b>                           | Through this option, Administrator can set number of Overdue period reporting on Overdue email notification (See <a href="#">Email Notifications</a> )   |
| <b>Show Clock Start/End by</b>                            | This drop-down allow administrator to choose between Account/Employee  |
| <b>TimeEntry Hours Format</b>                             | This drop-down option allow administrator to select between <b>Time</b> format ( <b>HH:MM</b> ) or Decimal format ( <b>1.5</b> ie. <b>1 Hour 30 Mins.</b> or <b>5.75</b> ie. <b>5 Hours 45 Mins.</b> )   |
| <b>TimeEntry Clock Format</b>                             | This drop-down option allow administrator to select between <b>24 Hour format (HH:MM)</b> or <b>12 Hour format (HH:MM AM/PM)</b>   |
| <b>Show additional Task Information Type in Timesheet</b> | This drop-down option allow administrator to select between some additional task information to be reflected in My Timesheet ( <b>Parent Task Name, Parent Task Code, Task Code or Task Type</b> ) Administrator can select any  |

|  |   |
|--|---|
|  | one.  |
| <b>Show additional Project Information Type in Timesheet</b> | This drop-down option allow administrator to select between some additional Project information to be reflected in My Timesheet ( <b>Project Code</b> ) |
| <b>Default Time Entry Mode</b>                               | This drop-down option allows Administrator to select between Day-View or Period View for default My Timesheet View.                                     |
| <b>Sort Timesheet By</b>                                     | This drop-down option allows administrator to select sorting of My Timesheet according to <b>Client</b> or by Default ( <b>Time Entry</b> )             |
| <b>Show Cost Center In Timesheet by</b>                      | This drop-down option allows administrator to select between <b>Account</b> or <b>Employee</b> to show their Cost Center                                |
| <b>Timesheet Print Footer</b>                                | This Footer will be visible in every Timesheet Print. Administrator can change its data according to organizational need.                               |

## Security :

Under this tab, Administrator can Enable Single Sign-On (**SSO**). This feature allow users to login with their **ADFS/SAML ID** (for Details view [ADFS Integration](#)).

The screenshot shows the 'Application Preference' window with the 'Security' tab selected. Under the 'Authentication Information' section, there is a checkbox labeled 'Enable Single sign-on (SSO):'. The checkbox is currently unchecked. At the bottom right, there are 'Update' and 'Cancel' buttons.

## Holiday Setup:

TimeLive provides few pre-defined holidays type such as US, UK etc. Administrator can define the holidays as per their organization rules & region by creating new **[Holiday Type]**. Administrator can create **[Holiday Types]** with different configurations and can assign these types separately to each individual employee. Administrator can also select pre-defined holidays comes by default with TimeLive. Following settings can be configured using Holiday options available in TimeLive.

## Selecting Pre-defined Holidays Types:

TimeLive comes with different pre-defined holidays set. Administrator can select those pre-defined holidays set from **[Admin Options]-->[Holidays]**. Once selected pre-defined holidays, administrator can fully edit those holidays types in **[Admin Options]-->[Holiday Types]**.

**Holiday List**

Holidays

| Holidays | Selected                            |
|----------|-------------------------------------|
| UK       | <input type="checkbox"/>            |
| Canada   | <input type="checkbox"/>            |
| US       | <input checked="" type="checkbox"/> |

**Update**

Holiday Year: 2013 **Copy Holidays to Next Year**

**Holiday List**

| Year | Holiday Name                        | Date       | Edit | Delete |
|------|-------------------------------------|------------|------|--------|
| 2013 | New Years Day                       | 1/1/2013   |      |        |
| 2013 | Birthday of Martin Luther King, Jr. | 1/18/2013  |      |        |
| 2013 | Washingtons Birthday                | 2/15/2013  |      |        |
| 2013 | Memorial Day                        | 5/31/2013  |      |        |
| 2013 | Independence Day                    | 7/5/2013   |      |        |
| 2013 | Labor Day                           | 9/6/2013   |      |        |
| 2013 | Columbus Day                        | 10/11/2013 |      |        |
| 2013 | Veterans Day                        | 11/11/2013 |      |        |
| 2013 | Thanksgiving Day                    | 11/25/2013 |      |        |
| 2013 | Christmas Day                       | 12/24/2013 |      |        |

**Holiday Information**

Holiday

Holiday Date: 5/30/2013 **---**

Holiday Name:

**Add**

## Holiday Types Setup:

System administrator can setup holiday types policies using **[Admin options]**----> **[Holiday Type]**.

## Adding Holiday Type:

To add new Holiday Type:

1. Enter new holiday type in **[Holiday Type Information]** form which you want to add.
2. Click on **[Add]** to add this **[Holiday Type]** in TimeLive system.

**Holiday Type List**

Holiday Type

| Holiday Type | Edit | Delete |
|--------------|------|--------|
| UK           |      |        |

**Holiday Type Information**

Holiday Type

Holiday Type:

**Add**

## Deleting Holiday Type:

1. In **[Holiday Type List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **[Yes]** on delete confirmation dialog.

## Editing Holiday Type:

1. In **[Holiday Type List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Holiday Type Information]** form.
3. Click on **[Update]** button to update this record.

## Defining Holidays Details:

After creating of **[Holiday Type]**, administrator can then define holidays days for that particular **[Holiday Type]**. To define holidays days in holiday type:

1. Click on **[Holidays]** link of **[Holiday Type]** in which you wish to define holidays.
2. Use this page to add, edit and delete holidays days of your selected **[Holiday Type]**

The screenshot shows a web interface for managing holidays. At the top, there is a 'Holiday Year' dropdown menu and a 'Copy Holidays to Next Year' button. Below this is a 'Holiday List' table with columns for 'Year', 'Holiday Name', and 'Date'. A single row is visible for the year 2013 with the holiday name 'Official Off' and the date '5/30/2013'. To the right of the date are 'Edit' and 'Delete' icons. Below the table is a 'Holiday Information' form with a 'Holiday' section. It contains a 'Holiday Date' field with a date picker set to '5/30/2013' and an 'Add' button. There is also a 'Holiday Name' text input field.

## Manage Terminology

**[Manage Terminology]** option now allows TimeLive Admin to change Timesheet terms to any of their own custom terminology. Admin can define which "TimeLive" terms they want to modify with their own required name in **[Admin Options]**-->**[Manage Terminology]**. After update, TimeLive will then use those terms in everywhere in application including menus, timesheet, forms, reports etc.

The screenshot shows the 'Manage Terminology' interface. It features a table with three columns: 'Terminology Name', 'User Defined Name', and 'Selected'. The first row shows 'Project' in the 'Terminology Name' column and 'Job' in the 'User Defined Name' column, with a checked checkbox in the 'Selected' column. There are four empty rows below it. At the bottom left of the table is an 'Update' button.

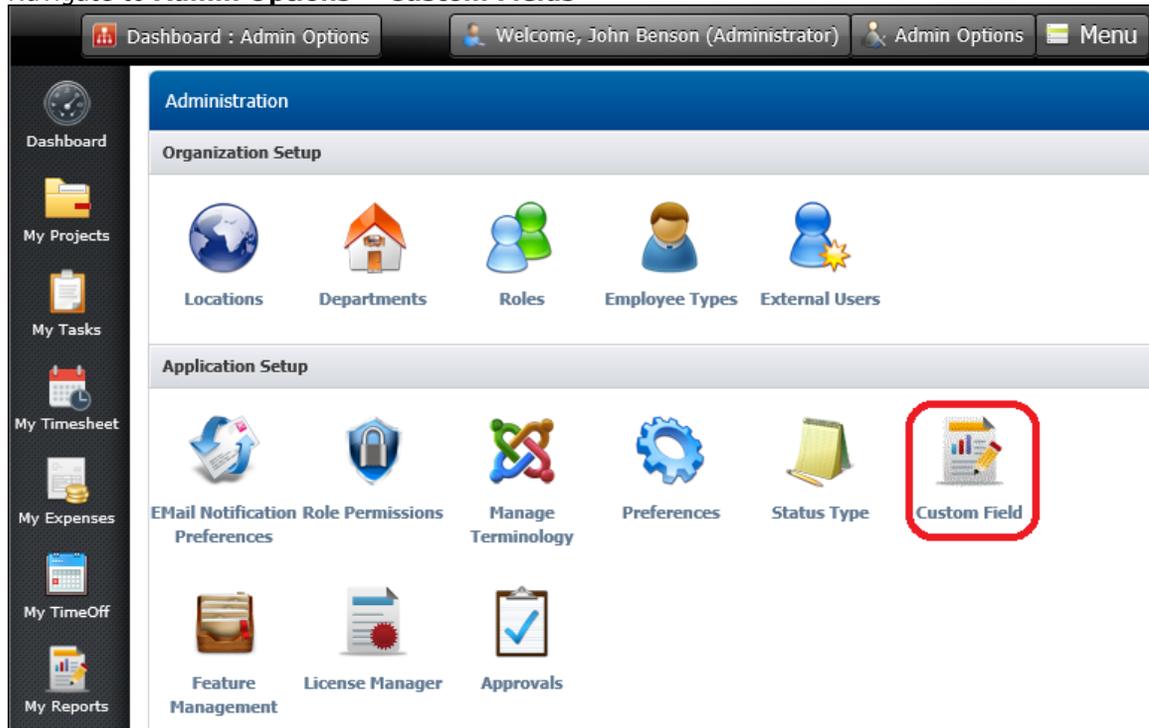
## Defining new Manage Terminology:

1. In **[Manage Terminology List]**, enter TimeLive built-in term in **[Terminology Name]** field.
2. Enter your own custom name in **[User Defined Name]** which you want to show in place of **[TimeLive built-in name]**.
3. Click on **[Selected]** checkbox in same row where you have defined this record.
4. Click on **[Update]** button to update this terminology.
5. TimeLive now will show this custom term defined above instead of built-in term everywhere.

## Custom Fields:

Different organizations have different requirements which are specific of their own. It helps them to keep their records according to their needs. TimeLive understands that and to cater their specific needs, Custom Field plays key role in achieving this.

Navigate to **Admin Options > Custom Fields**



Following picture shows list of **Entities** under which Custom Fields can be created. Through **Manage** link against the each entity, Administrator can create custom fields according to organizational needs.

| Custom Field  |        |
|---------------|--------|
| Entity Type   |        |
| Client        | Manage |
| Employee      | Manage |
| Expense Entry | Manage |
| Expense Sheet | Manage |
| Project       | Manage |
| Project Task  | Manage |
| Timesheet     | Manage |

There are 4 Data Type through which, Custom Field can be created.

- Number
- Text
- Drop-Down
- Date

### Add Custom Field

**Custom Field**

**Data Type:** Number  
Text  
Drop-Down  
Date

**\*Custom Field Name:**

**\*Custom Field Caption:**

**Default Value:**

**IsRequired:**

In below screenshot, 1 custom field "Date of Birth" is created, which is under Employee Entity. IsRequired check is a validation if this field is mandatory or not. Further, a new custom field is in creation process. Data Type is selected as Drop-Down and list of options will be visible under employee record for custom field selection.

| Custom Field List |               |           |               |          |      |        |
|-------------------|---------------|-----------|---------------|----------|------|--------|
| Type              | Name          | Caption   | Default Value | Required | Edit | Delete |
| Date              | Date of Birth | Birth Day |               | True     |      |        |

### Add Custom Field

**Custom Field**

Data Type:

\*Custom Field Name:

\*Custom Field Caption:

Default Value:

IsRequired:

Options:

Hourly

Weekly

Contract

Permanent

Temporary

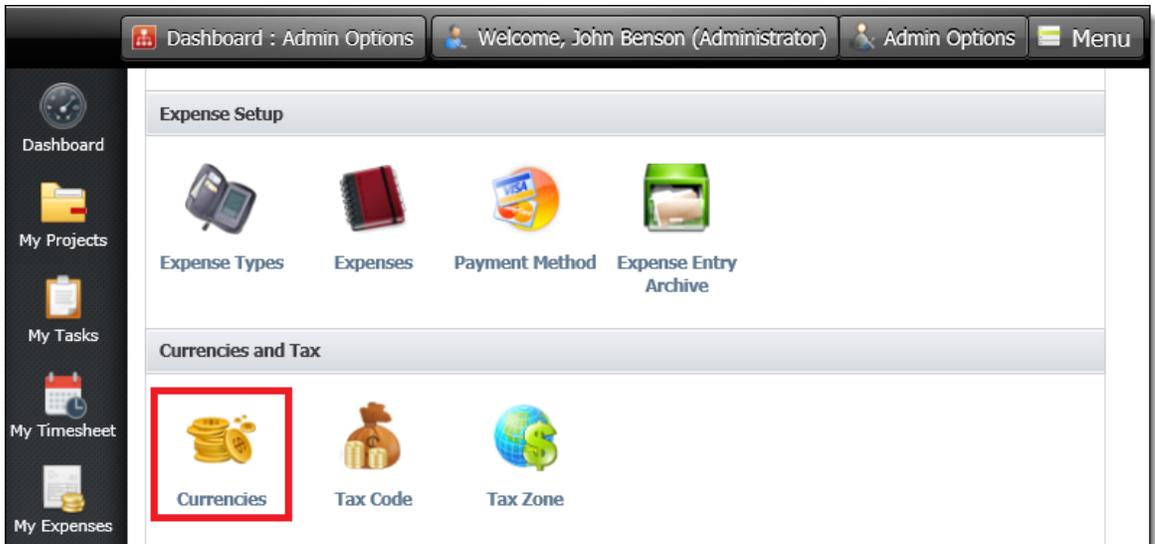
Freelancer

Intern

## Currencies:

TimeLive allows multiple currencies for each organization. This feature is under **Admin Options > Currencies**.

Currencies plays very important role in Timesheet and Expense Billing. It also manages rates fluctuations for any length of time under multiple date ranges for each currency.



By default, most commonly used currency are predefined in TimeLive,

**Currencies List**

| Id | Name                   | Symbol | Exchange Rate | Edit | Delete |         |
|----|------------------------|--------|---------------|------|--------|---------|
| 6  | Australia, Dollars     | AUD    | 1.3136        |      |        | History |
| 2  | Canada, Dollars        | CAD    | 1.3370        |      |        | History |
| 5  | Euro Member Countries  | EUR    | 0.7965        |      |        | History |
| 4  | Japan, Yen             | JPY    | 105.7290      |      |        | History |
| 7  | Switzerland, Franc     | CHF    | 1.2493        |      |        | History |
| 3  | United Kingdom, Pounds | GBP    | 0.5448        |      |        | History |
| 1  | United State Dollar    | US\$   | 1.0000        |      |        | History |

**Currencies Information**

Currencies

\*Name:

\*Exchange Rate:

But TimeLive is not limited to these only. User can add/remove any currency according to their need.

**Currencies List**

| Id | Name                   | Symbol | Exchange Rate | Edit | Delete |         |
|----|------------------------|--------|---------------|------|--------|---------|
| 6  | Australia, Dollars     | AUD    | 1.3136        |      |        | History |
| 2  | Canada, Dollars        | CAD    | 1.3370        |      |        | History |
| 5  | Euro Member Countries  | EUR    | 0.7965        |      |        | History |
| 4  | Japan, Yen             | JPY    | 105.7290      |      |        | History |
| 7  | Switzerland, Franc     | CHF    | 1.2493        |      |        | History |
| 3  | United Kingdom, Pounds | GBP    | 0.5448        |      |        | History |
| 1  | United State Dollar    | US\$   | 1.0000        |      |        | History |

**Currencies Information**

**Currencies**

\*Name: **US\$ - United State Dollar**

\*Exchange Rate:

Click here to chat

User can add new Currency by selecting Currency name from the list and define exchange rate with Base Currency.

To disable any Currency, click **Edit** against the currency and select **Is Disabled**.

To manage/update existing Currency rate, click on **History** link.

**Currencies List**

| Id | Name                   | Symbol | Exchange Rate | Edit | Delete | History                 |
|----|------------------------|--------|---------------|------|--------|-------------------------|
| 6  | Australia, Dollars     | AUD    | 1.3136        |      |        | <a href="#">History</a> |
| 2  | Canada, Dollars        | CAD    | 1.3370        |      |        | History                 |
| 5  | Euro Member Countries  | EUR    | 0.7965        |      |        | History                 |
| 4  | Japan, Yen             | JPY    | 105.7290      |      |        | History                 |
| 7  | Switzerland, Franc     | CHF    | 1.2493        |      |        | History                 |
| 3  | United Kingdom, Pounds | GBP    | 0.5448        |      |        | History                 |
| 1  | United State Dollar    | US\$   | 1.0000        |      |        | History                 |

**Currencies Information**

**Currencies**

\*Name: AUD - Australia, Dollars

\*Exchange Rate: 1.3136

Is Disabled:

In the below screenshot, 3 different exchange rates are already added according to their dates. This will allow organizations to control the currency day-to-day fluctuations or contract rates.

Current Currency: AUD - Australia, Dollars

### Exchange Rate List

| Exchange Rate        | Start Date           | End Date             | Edit | Delete |
|----------------------|----------------------|----------------------|------|--------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |      |        |
| 1.3168               | 9/21/2016            | 9/21/2017            |      |        |
| 1.3136               | 11/21/2013           | 11/21/2015           |      |        |
| 1.1136               | 11/20/2012           | 11/20/2013           |      |        |

### Exchange Rate Information

Exchange Rate

Value (1 Base Currency Unit = X New Currency Units)

\* Exchange Rate:

Start Date:

End Date:

Update all record within this range:

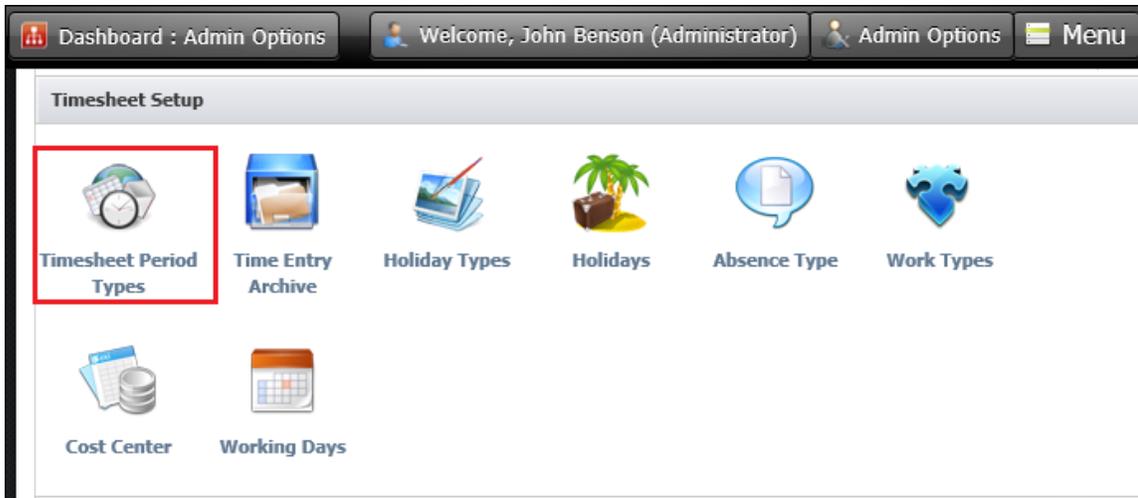
There are two main issues which should always be on the check that

1. No Date ranges should overlap
2. During updating/managing existing rate, user must enable **Update all records within this range** check to avoid any miscalculations

### Timesheet Period View:

**Timesheet periods** determine the length of user Timesheets. They should parallel either your **organization's pay periods** or **billing cycle** so that timesheet data is available when needed for generating payroll or for invoicing clients. A **System timesheet** period is assigned to new users by default. Administrator can use different Timesheet Period for different employees, according to different [Working Days](#).

This feature is under **Admin Options > Timesheet Period View**.



Under Timesheet Period Types, there are 5 types of Period view from which 1 can be used in [Working Day](#).

| Timesheet Period Types |                            |                          |      |  |
|------------------------|----------------------------|--------------------------|------|--|
| Timesheet Period Type  | Initial Days Of The Period | Initial Day Of The Month | Edit |  |
| Daily                  |                            |                          |      |  |
| Weekly                 |                            |                          |      |  |
| BiWeekly               |                            |                          |      |  |
| Semi-Monthly           | 1st And 16th               |                          |      |  |
| Monthly                |                            | 1                        |      |  |

**Timesheet Period Type Information**

Timesheet Period Type

\* Timesheet Period Type:

IsDisabled:

It does sound that Bi-weekly and Semi-monthly are similar but there is a difference. In **BiWeekly**, TimeLive allows user to change start period date according to the organizational need (as per below picture shows). Whereas, in **Semi-monthly**, periods are fixed from **1st to 15th** and **16th to the end of the month date**.

|              |              |   |  |  |
|--------------|--------------|---|--|--|
| Daily        |              |   |  |  |
| Weekly       |              |   |  |  |
| BiWeekly     |              |   |  |  |
| Semi-Monthly | 1st And 16th |   |  |  |
| Monthly      |              | 1 |  |  |

**Timesheet Period Type Information**

**Timesheet Period Type**

\* Timesheet Period Type:

\* Initial Days Of The Period:

IsDisabled:

<Select>  
 1st And 16th  
 2nd And 17th  
 3rd And 18th  
 4th And 19th  
 5th And 20th  
 6th And 21st  
 7th And 22nd  
 8th And 23rd  
 9th And 24th  
 10th And 25th  
 11th And 26th  
 12th And 27th  
 13th And 28th

In **Monthly** Timesheet Period, TimeLive allows user to set **month start date** according to the organizational need.

**Timesheet Period Type Information**

**Timesheet Period Type**

\* Timesheet Period Type:

\* Initial Day Of The Month:

IsDisabled:

**Project Template:**

Some organizations have different projects but have same tasks and same employees' team for those projects. Creating every project with same tasks and team could be frustrating and some data can be missed out easily.

Dashboard : Admin Options    Welcome, John Benson (Administrator)    Admin Options    Menu

**Project / Task Setup**

 Task Types   
  Priorities   
  Project Types   
  **Project Templates**

**Time Off Setup**

 Time Off Types   
  Time Off Policies

In TimeLive, Administrator can create template as per requirement without any limitation to cater such need. Not only the template allows user to create task and team, it also allows to create Milestones and attachments for the same. To access Project Template page navigate to **Admin Options > Project Template**.

**Project List**

| Id                   | Code                 | Project Name         | Client Name          | Start Date           | Status               | Edit | Delete |  |  |  |  |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------|--------|--|--|--|--|
| <input type="text"/> |      |        |  |  |  |  |

There are no items to display.

[Add](#)

Creating new Project Template:

### Project Template Information

#### Project Template

Project Code:

\* Client Name:

\* Project Name:

Project Status:

Start Date:

Due Date:

#### Advance Options

Duration:  Hours

Project Estimated Cost:

Creating a New Project Template is as easy as creating a New Project. All the steps are the same including creating team and tasks. ([Creating New Project](#))  
After creating new project template user can now use this template in creating new project. User will observe that creating Project by using Project Template, Tasks, Team members, Milestones are added automatically (if created in Project Template) into the newly created project.

# Reports

## Understanding Reports

Reports are helpful for determining how time is utilized throughout your organization and for reviewing project costs and client billing. You can generate reports to review detailed or summarized data. TimeLive allows you to create highly-customized reports to assist with tracking and management of time, expenses, users, and projects. Reports can be viewed within TimeLive or saved to a PDF or Excel (CSV) file.

A number of default reports have been installed with TimeLive; refer to Default Reports for a list of these reports and their uses. You can run these reports without modification, or customize these reports.(see Bottom)

If you are running a text report with Summary Options selected, choose the Data Display Style:

- **Detailed:** each report entry will display in a separate row. Plus, a summary row will display for each row grouping and for the report as a whole.
- **Consolidated:** only summary rows will display – for each row grouping and for the report as a whole

The best way to start learning which reports work best for you is by viewing the report previews and running test reports.

Reports can be launched by clicking on **[My Reports]** link in left-navigation menu.

## Report Home Page :

[Add New Report](#)

**My Reports**

| Report Name   | Customize | Permissions | Delete  | Copy |
|---|-----------|-------------|---|------|
| <b>User</b>   |           |             |   |      |
|  <b>Detail Timesheet Report</b><br>Generates a timesheet report for a given user for a given time period. The user can select the details to be included in the report.                            | Customize | Permissions |   | Copy |
|  <b>Attendance Detail Report</b><br>Generate Attendance detail report for a given user for a given period. User can select different parameters like employee, startdate, enddate.                 | Customize | Permissions |   | Copy |
|  <b>Employee Attendance Summary Report</b><br>Summary of employee attendance helpful for user and administrator to generate summary of employee attendance for payroll purpose.                    | Customize | Permissions |   | Copy |
|  <b>Employee Absence Detail Report</b><br>Detail report of employee absence in specified data range. Helpful for payroll department to get list of absent in specified date range.                 | Customize | Permissions |   | Copy |
|  <b>Absence Summary Report</b><br>Report for generating summary of employee leave like sick leave, casual leave etc in specified range.  | Customize | Permissions |   | Copy |
|  <b>Detail Expense Report</b><br>Generates an expense report for a given user for a given time period. The user can select the details to be included in the report.                               | Customize | Permissions |   | Copy |
|  <b>Expense Sheet Report</b><br>Expense Sheet Report   | Customize | Permissions |   | Copy |
|  <b>Time Entry Period</b><br>Time Entry Period   | Customize | Permissions |   | Copy |
|  <b>Employee Time Off</b><br>Employee Time Off   | Customize | Permissions |   | Copy |
|  <b>Employee Time Off Detail</b><br>Employee Time Off Detail   | Customize | Permissions |   | Copy |
|  <b>Employee Time Off Request</b><br>Employee Time Off Request   | Customize | Permissions |   | Copy |
| <b>Project Management</b>   |           |             |   |      |
|  <b>Timesheet Approval Activity</b><br>Timesheet Approval Activity   | Customize | Permissions |   | Copy |
|  <b>Expense Approval Activity</b><br>Expense Approval Activity   | Customize | Permissions |   | Copy |
|  <b>Project Cost And Revenue Report</b><br>Project Cost And Revenue Report   | Customize | Permissions |   | Copy |
|  <b>Detail Task Report</b><br>Detail Task Report   | Customize | Permissions |   | Copy |
|  <b>Task Summary Report</b><br>Task Summary Report   | Customize | Permissions |   | Copy |
|  <b>Task Status Summary Report</b><br>Summary of all project tasks status. Useful for project manager to get a high level view of whole project status.  | Customize | Permissions |   | Copy |
|  <b>Project Task Employee Report</b><br>Project Task Employee  | Customize | Permissions |   | Copy |
|  <b>Project Team Report</b><br>Project Team Report   | Customize | Permissions |   | Copy |
|  <b>Timesheet Submission Report</b><br>Generates an employee-wide summarize report for time entries with missing entries.  |           | Permissions |   |      |
| <b>Billing</b>  |           |             |   |      |
|  <b>Billing Report</b><br>Generates a project-wide billing report for a given user for a given time period. The user can select the details to be included in the report.                        | Customize | Permissions |   | Copy |
|  <b>Expense By Client Report</b><br>Summary of Expenses incurred on project. Can be generated based on project, client, employee and data range.   | Customize | Permissions |   | Copy |
|  <b>Department Wise Timesheet Report</b><br>Generates a department-wide timesheet report for a given user for a given time period. The user can select the details to be included in the report. | Customize | Permissions |   | Copy |
|  <b>Project Expense Detail Report</b><br>Generates a project expense detail report for a given user for a given time period. The user can select the details to be included in the report.       | Customize | Permissions |   | Copy |
|  <b>Invoice Summary Report</b><br>Summary of Invoice Report.   | Customize | Permissions |   | Copy |
|  <b>Task Billing By Projects/Clients Customized</b><br>Generates an employee-wide project summary report with expense detail.  | Customize | Permissions |  | Copy |
| <b>Audit Trail</b>  |           |             |   |      |
|  <b>Timesheet Audit Trail Report</b><br>Generate Timesheet Audit Trail   | Customize | Permissions |   | Copy |
|  <b>Expense Sheet Audit Trail Report</b><br>Generate Expense Sheet Audit Trail Report  | Customize | Permissions |   | Copy |
| <b>Administrator</b>  |           |             |   |      |
|  <b>All Locations Report</b>   |           |             |   |      |

## Parts of report:

1. **Filter option of report.** These filter option are available in all reports. Just select your required filter and click on **[Show]** button to get report output.
2. **Report toolbar.** Report toolbar has options of exporting reports and page navigation buttons.
3. **Report output.** Actual report output based on selected report filter.

## Running a Report

To run a report:

1. Navigate report home page using either left navigation menu **[My Reports]** or from top menu **[REPORTS]**.
2. Select Reports from report page which you want to run.
3. Select the data to be displayed in the report by setting the filters provided on top of report.

## Exporting a Report

To export a report

1. Run report
2. Select your desired exportable format [PDF, HTML, XLS, RTF].
3. Click on **[Export]** icon just right on exportable format drop-down.

## Printing a Report

To print a report

1. Run report
2. Click on **[Print]** icon in report toolbar to print currently selected reports.

## Report Customization:

This feature allow users to edit Name, Fields, grouping and layout of report. Each report can be customized according to organizational needs. To customize any report please click **Customize** link against required report. For Understanding Report Customization or creating new report, please review [Understanding Report Designer](#).

## Report Permission:

This feature allow users to access and modify reports according to Roles assigned in their profile. Each report has its own set of permissions which can be modified according to organizational/Role needs.

| Report Permission      |                                     |                                     |                                     |                                     |                                     |                                     |                          |                          |
|------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| Role                   | Show Report                         | Allow Customization                 | Allow All                           | Allow Own Report                    | Allow Own Team                      | Allow Own Project                   | Allow Own Sub-Ordinates  | Allow Own Approval       |
| Administrator          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| Expense Entry Approver | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| External User          | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| Project Manager        | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Team Lead              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| Time Entry Approver    | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| User                   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |

### Report Permission in detail:

**Show Report** : This is basic permission which allow User to see this report in My Reports. If check is not applied, user will not be able to see that particular report in My Report Grid.

**Allow Customization**: This permission give access to the Customization option in My Report for only that particular report (See [Understanding Report Designer](#) for Customization). Show Report check is mandatory if this check is enabled.

**Allow All**: This permission gives access to view all employees in the organization.

**Allow Own Report**: This permission gives access to user to view his/her own report.

**Allow Own Team**: This permission gives access to user to view his/her own Team Report. For Example if he/she is the team lead or PM in any project, user can view their teams' report.

**Allow Own Project**: This permission give access to user to view his/her own Project Report.

**Allow Own Sub-Ordinates**: This permission give access to user to view Report of those employees of whom he/she is Employee Manager.

### System Reports

TimeLive includes a large number of default reports. You can use the **[Report Datasources]** to create your own customized versions of reports. Alternatively, you can use pre-defined default reports, which are based on the **[Report Datasources]**. You can also customize default reports by modifying their settings.

TimeLive currently have following system reports which are available by default:

#### Users Reports:

- Detail Timesheet Report
- Detail Expense Report
- Attendance Detail Report
- Employee Attendance Summary Report
- Employee Absence Detail Report
- Absence Summary Report
- Detail Expense Report

**Project Management Reports:**

Timesheet Approval Activity  
Expense Approval Activity  
Attendance Detail Report  
Project Cost And Revenue Report  
Detail Task Report  
Task Summary Report  
Task Status Summary Report  
Timesheet Submission Report  
Project Activity Summary Report

**Billing Reports:**

Billing Report  
Task Billing By Projects/Clients  
Expense By Client Report  
Department Wise Timesheet  
Report  
Project Expense Detail Report

**Administrator Reports:**

All Locations Report  
All Departments Report  
All Clients Report  
All Employees Report  
All Projects Of Organization  
All External Users Report

**Understanding Report Designer**

TimeLive reports are generating using pre-defined report data-sources. From these data-sources, user can select/deselect columns which they want to be showed in reports. User can also define grouping, different summarized functions and custom formulas on all available Datasource columns.

**Report Data-source:**

These are the report Datasource currently available in TimeLive.

1. Absence
2. Attendance
3. Clients
4. Departments
5. Employee Time Off Audit Report
6. Employee Time Off Details
7. Employee Time Off Summary
8. Employees
9. Expense Entry
10. Expense Entry Approval Activity
11. Expense Sheet
12. Expense Sheet Audit Trail
13. External Users
14. Locations
15. Missing Time Entry Period
16. Project Task

17. Project Team
18. Projects
19. Tasks
20. Time Entry
21. Time Entry Approval Activity
22. Time Entry Period
23. Time Entry Periodic Submission
24. Time Off Request
25. TimeLive Invoice
26. Timesheet Audit Trail

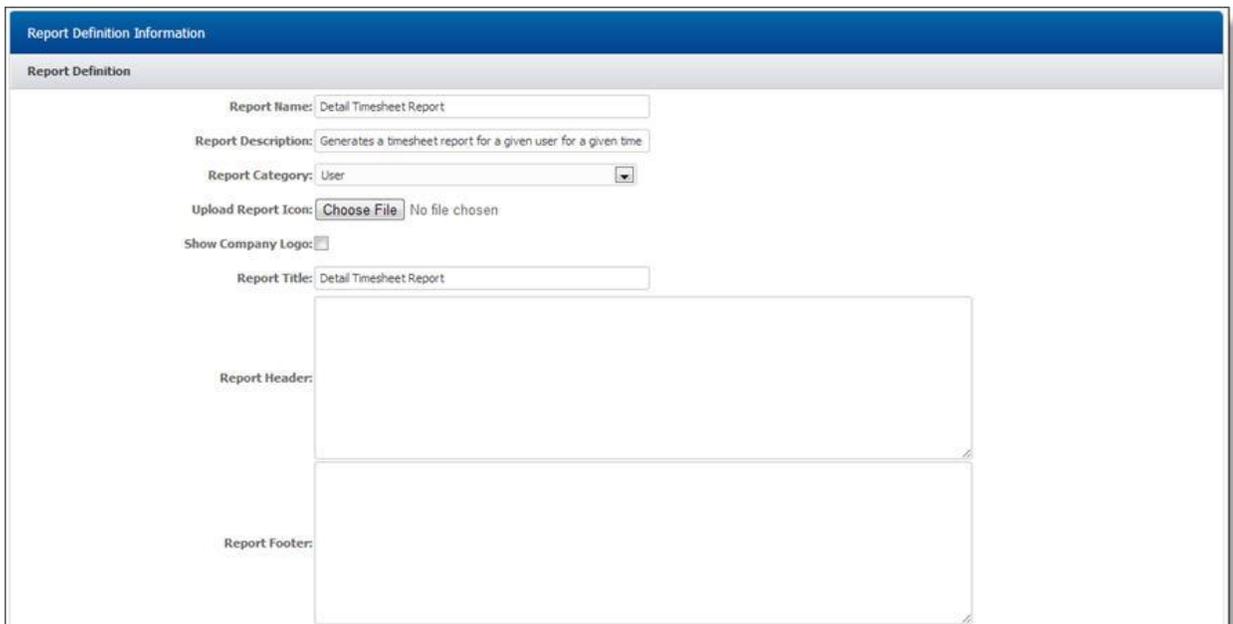
## Report Designer Steps:

TimeLive Report Designer consist of 3 important wizard steps. Following are the name of steps and a brief description of every steps:

### Step: 1 - Report Description

For defining report name, report icon, report category and report type (detailed or consolidated).

Further, Unique Header and Footer can be described for identification of report during View, Export, or in Print.



The screenshot shows a web-based form titled "Report Definition Information" with a sub-section "Report Definition". The form contains the following fields and controls:

- Report Name:** A text input field containing "Detail Timesheet Report".
- Report Description:** A text input field containing "Generates a timesheet report for a given user for a given time".
- Report Category:** A dropdown menu with "User" selected.
- Upload Report Icon:** A "Choose File" button and the text "No file chosen".
- Show Company Logo:** An unchecked checkbox.
- Report Title:** A text input field containing "Detail Timesheet Report".
- Report Header:** A large, empty text area for defining the report header.
- Report Footer:** A large, empty text area for defining the report footer.

### Step: 2 - Report Datasource Selection

Different Datasource contains some similar fields but most of unique ones related to its Datasource to generate required report.

User can Edit existing Report or can create new report through this Wizard page according to the requirements.

Following are the list of activity can be performed in this Wizard Page,

- Can select/ de-select Datasource column from report as per requirement.

- Can give different Caption for each field according to organization's terminology.
- Can **Group** single or multiple fields to extract complex reports. (EmployeeName is grouped in below screenshot)
- Can select group summary type (sum, count) etc for each report column.
- Formula Fields (see [Formula Column Syntax](#)) and Custom Fields (if defined under **Admin Options** > **Custom Fields** see [Custom Fields](#)) can be added to extract more customized report.

Report Information

Report Name: Detail Timesheet Report

Report Datasource: Time Entry

Report Column

| Select                              | Report Column             | Caption                       | Group                               | Show Summary | Formula |
|-------------------------------------|---------------------------|-------------------------------|-------------------------------------|--------------|---------|
| <input checked="" type="checkbox"/> | TimeEntryDate             | Date                          | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | ProjectName               | Project Name                  | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | TaskName                  | Task Name                     | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | TotalTime                 | Duration                      | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | Description               | Description                   | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | AccountWorkType           | Work Type                     | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | AccountCostCenter         | Cost Center                   | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | BillingRate               | Billing Rate                  | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | Amount                    | Amount                        | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | BaseCurrencyAmount        | Amount (BaseCurrency)         | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | ApprovalStatus            | Approval Status               | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | Submitted                 | Submitted                     | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | Approved                  | Approved                      | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | Rejected                  | Rejected                      | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | Percentage                | Percentage%                   | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | ProjectCode               | Project Code                  | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | TaskCode                  | Task Code                     | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | AccountCostCenterCode     | Cost Center Code              | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | EmployeeRate              | Employee Rate                 | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | IsBillable                | Billable                      | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | ApproverComments          | Approver's Comments           | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | ApprovedOn                | Approved On                   | <input type="checkbox"/>            | <None>       |         |
| <input checked="" type="checkbox"/> | TotalHours                | Hours                         | <input type="checkbox"/>            | Sum          |         |
| <input type="checkbox"/>            | StartTime                 | Start Time                    | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | EndTime                   | End Time                      | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | TaskType                  | Task Type                     | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | TaskStatus                | Task Status                   | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | Priority                  | Priority                      | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | EstimatedHours            | Task Estimated Hours          | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | EstimatedCost             | Task Estimated Cost           | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | BaseCurrencyEstimatedCost | Estimated Cost (BaseCurrency) | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | MilestoneDescription      | Milestone Description         | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | ClientNick                | Client Nick                   | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | ClientName                | Client Name                   | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | EmployeeCode              | Employee Code                 | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | EmployeeName              | Employee Name                 | <input checked="" type="checkbox"/> | <None>       |         |
| <input type="checkbox"/>            | EMailAddress              | Email Address                 | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | DepartmentCode            | Department Code               | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | DepartmentName            | Department Name               | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | AccountLocation           | Location Name                 | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | EmployeeManager           | Employee Manager              | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | TeamLeader                | Team Leader                   | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | ProjectManager            | Project Manager               | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | BaseCurrencyBillingRate   | Billing Rate (BaseCurrency)   | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | BaseCurrencyEmployeeRate  | Employee Rate (BaseCurrency)  | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | EmployeeCost              | Employee Cost                 | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | BaseCurrencyEmployeeCost  | Employee Cost (BaseCurrency)  | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | Role                      | Role                          | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | DayNo                     | Day No.                       | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | WeekDayName               | Day                           | <input type="checkbox"/>            | <None>       |         |
| <input type="checkbox"/>            | WeekNo                    | Week No.                      | <input type="checkbox"/>            | <None>       |         |

### Step 3: Column and Group Ordering

The last page of Report Wizard, there are two tables. Both tables play crucial part in generating the report according to the requirements.

**Column Order** : Allows user to set the order of fields in which report view is required. Top most field will be first column of the report and the last Field in the order will be the last column of the report.

**Group Order** : If in the second page, Group check is enabled in any field, those fields will be visible in this table. That too can be sorted according to the requirement.

In below screenshot, Employee Name was grouped to view Report according to Employee name then the date which is the first field of Column order.

The screenshot displays the 'Report Information' section at the top, with the 'Report Name' set to 'Detail Timesheet Report Customized'. Below this are two main sections: 'Column Order' and 'Group Order'. The 'Column Order' section lists various fields: Date, Project Name, Work Phases Name, Duration, Description, Submitted, Approved, Hours, Profit (BaseCurrency), and Holiday Name. The 'Group Order' section lists 'Employee Name'. Both sections have up and down arrow icons for reordering. At the bottom right, there are 'Previous' and 'Finish' buttons.

### Understanding Formula Columns

TimeLive allows 5 formula fields in every report datasource. User can enter their own custom formula for these columns. And they can perform other reports functions like grouping, calculations (sum etc) and showing in reports.

|                          |               |                 |                          |        |  |   |
|--------------------------|---------------|-----------------|--------------------------|--------|--|---|
| <input type="checkbox"/> | FormulaField1 | Formula Field 1 | <input type="checkbox"/> | <None> |  | ? |
| <input type="checkbox"/> | FormulaField2 | Formula Field 2 | <input type="checkbox"/> | <None> |  | ? |
| <input type="checkbox"/> | FormulaField3 | Formula Field 3 | <input type="checkbox"/> | <None> |  | ? |
| <input type="checkbox"/> | FormulaField4 | Formula Field 4 | <input type="checkbox"/> | <None> |  | ? |
| <input type="checkbox"/> | FormulaField5 | Formula Field 5 | <input type="checkbox"/> | <None> |  | ? |

### A typical case for Formula Columns:

Billing departments wants to submit client billing reports with 10% extra overhead charges. TimeLive administrator then decided to [customize] **[Task Billing By Projects/Clients]** in **[Billing Reports]** category.



| Task Name                     | Duration | Amount          | Amount (EUR)        | Hours        | Tax       | Net Amount |
|-------------------------------|----------|-----------------|---------------------|--------------|-----------|------------|
| Implementing Epidemic round 2 | 03:00    | US\$ 285.00     | EUR 285.00          | 3.00         | 11,400.00 | -11,115.00 |
| Implementing Epidemic round 2 | 08:00    | US\$ 760.00     | EUR 760.00          | 8.00         | 30,400.00 | -29,640.00 |
| Implementing Epidemic round 2 | 07:00    | US\$ 665.00     | EUR 665.00          | 7.00         | 26,600.00 | -25,935.00 |
| Implementing Epidemic round 2 | 08:00    | US\$ 760.00     | EUR 760.00          | 8.00         | 30,400.00 | -29,640.00 |
| Implementing Epidemic round 2 | 04:00    | US\$ 380.00     | EUR 380.00          | 4.00         | 15,200.00 | -14,820.00 |
| Implementing Epidemic round 2 | 03:00    | US\$ 285.00     | EUR 285.00          | 3.00         | 11,400.00 | -11,115.00 |
| Implementing Epidemic round 2 | 02:00    | US\$ 190.00     | EUR 190.00          | 2.00         | 7,600.00  | -7,410.00  |
| Implementing Epidemic round 2 | 09:00    | US\$ 855.00     | EUR 855.00          | 9.00         | 34,200.00 | -33,345.00 |
| Implementing Epidemic round 2 | 08:00    | US\$ 760.00     | EUR 760.00          | 8.00         | 30,400.00 | -29,640.00 |
| Implementing Epidemic round 2 | 04:00    | US\$ 380.00     | EUR 380.00          | 4.00         | 15,200.00 | -14,820.00 |
| Implementing Epidemic round 2 | 03:00    | US\$ 285.00     | EUR 285.00          | 3.00         | 11,400.00 | -11,115.00 |
| Implementing Epidemic round 2 | 02:00    | US\$ 190.00     | EUR 190.00          | 2.00         | 7,600.00  | -7,410.00  |
|                               |          | <b>5,795.00</b> | <b>EUR 5,795.00</b> | <b>61.00</b> |           |            |
|                               |          | <b>5,795.00</b> | <b>EUR 5,795.00</b> | <b>61.00</b> |           |            |

4. Click on **[Permissions]** link to give this customized reports to your required Roles.

## Formula Column Syntax

Formula columns are derived from user-defined formulas. Users create these formulas by combining columns (fields) available in the report.

## When might I need to create a custom column?

Custom columns are useful for creating such numeric fields as:

- Values with non-standardized modes of calculation that are therefore not included in TimeLive as default columns (for example, overhead cost etc)
- Calculations specific to your organization
- Highly-specialized calculations

## Numeric Formula Examples:

- A formula for 10% Overhead cost in the **[Detail Timesheet Report]**:  
(Amount \* 10 / 100)
- A formula for calculating profit margin in the **[Detail Timesheet Report]**.  
(BillingRate - EmployeeRate) \* TotalHours

## Text Formula Examples:

- To identify location and their departments in a single field, you could combine both location and department by creating a formula like this:  
(AccountLocation+'-' DepartmentName)

## Numeric Operators:

| Operator | Use this operator to specify... |
|----------|---------------------------------|
| +        | Addition                        |
| -        | Subtraction                     |
| *        | Multiplication                  |
| /        | Division                        |
| ( ... )  | Parentheses                     |
| =        | Two values are equal            |
| <        | Less than                       |
| >        | Greater than                    |
| <=       | Less than or equal              |
| >=       | Greater than or equal           |
| !=       | Not equal                       |
| %        | Modulus                         |

Operators follow standard order of operations rules. For example:

- $2 + 2 * 2 = 6$ , but  $(2 + 2) * 2 = 8$
- $2 + 2 / 2 = 3$ , but  $(2 + 2) / 2 = 2$

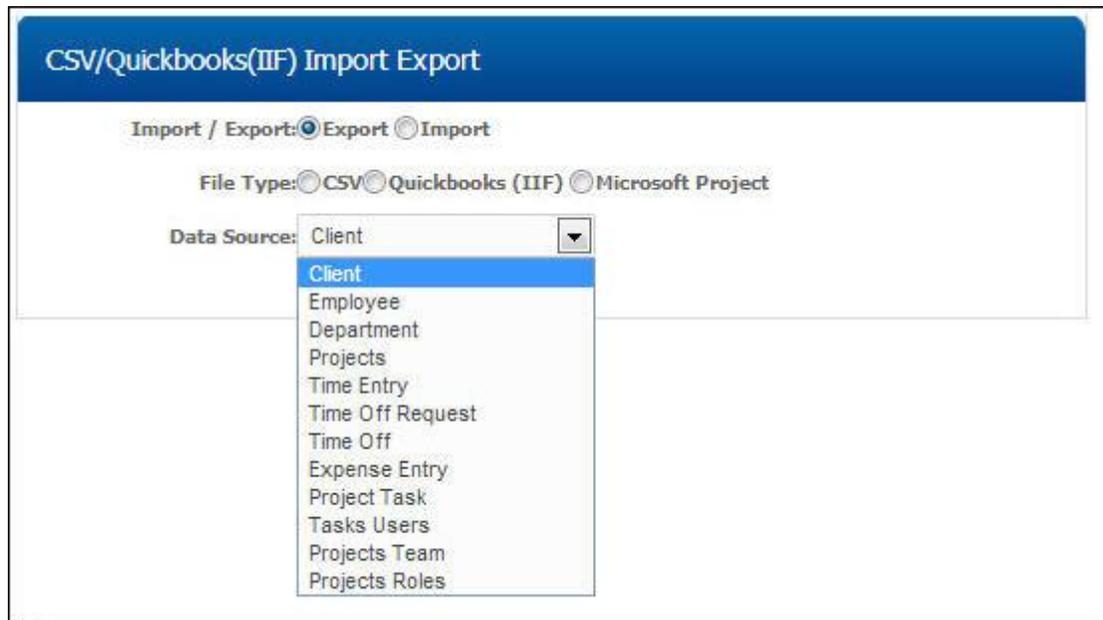
## Functions:

| Functions | Description   | Syntax                                 | Example  |
|-----------|---|--|--|
| IIF       | Gets one of two values depending on the result of a logical expression                | Iif ( expr, truepart, falsepart )      | Iif (billingrate>500,'expensive','dear' )                      |
| LEN       | Gets the length of a string   | LEN ( expression )                     | Len (EmployeeName)   |
| CONVERT   | Converts particular value to a specified .NET Framework Type.                         | Convert(expression, type)              | Convert(total, 'System.Int32'),<br>Convert(id,'System.String') |
| SUBSTRING | Gets a sub-string of a specified length, starting at a specified point in the string. | SUBSTRING (expression, start, length ) | SUBSTRING ( phone, 7, 8 )                                      |

# Integration

## Importing / Exporting Raw Data

TimeLive's raw data imports/exports allow you to import / export raw **[timesheet]**, **[project]**, and **[expense]** data to spreadsheets using a CSV file. CSV file can be opened in Excel as well as standard way of transferring data from different applications.



TimeLive support these types of data in CSV Import / Export:

1. Client
2. Employee
3. Department
4. Projects
5. Time Entry
6. Expense Entry
7. Project Tasks
8. Task Users
9. Project Team
10. Project Roles

## QuickBooks Integration

### Using TimeLive QuickBooks Integration Tool

### Using TimeLive's QuickBooks Integration Tool

**[TimeLive QuickBooks Integration Manager]** provides users the ability to transfer information between **TimeLive** and **QuickBooks**. With the ability to transfer time and expense data, the integration module is an ideal solution for those working on projects or tasks that are to be billed to clients. Using TimeLive, you can track the actual time spent working on projects, then transfer the

data to QuickBooks, to invoice clients for the work completed. Time data entered by employees can also be transferred for use in generating **payroll timesheets** in QuickBooks. Plus, **expenses** incurred against the project can also be entered in TimeLive, and transferred to QuickBooks to **reimburse employees, pay vendors** and **charge clients**. Additionally, you can use the integration module to save the time and effort associated with entering the user and project data in both QuickBooks and TimeLive. This duplication can be eliminated by entering the data in one application and transferring to the other using the **[TimeLive QuickBooks Integration Manager]**.

| Data Type        | TimeLive Term  | QuickBooks Term                         |
|------------------|--|---|
| Employees        | Employee (ones paid on a regular Employee and on-going basis). |   |
| Vendors          | Employees with "IsVendor=Yes in Vendor Employee Types"         |   |
| Customers        | Clients  | Customers                               |
| Jobs/Items       | Project / Task   | Job/Item, Job/Sub Job or Item/ Sub Item |
| Time Tracking    | Timesheet  | Time Tracking                           |
| Expense Tracking | Expense Sheet  | Vendor Bills                            |

Steps for setting up TimeLive's QuickBooks Integration Tool:

1. Download the module
2. Installing the module
3. Configuring QuickBooks for use with the Module.
4. Launching the Module

## Downloading the module:

TimeLive's QuickBooks integration module can be download from download page from <http://www.livetecs.com/Home/Download.aspx>

## Installing the module

Installation of the module is a simple, wizard-guided process. Before beginning installation, ensure that:

1. Your machine meets the integration module's minimum system requirements.
2. You are installing the integration module on the computer where QuickBooks is installed.
3. Your version of QuickBooks is updated to include all available patches (recommended).

## Configuring QuickBooks for use with the Module

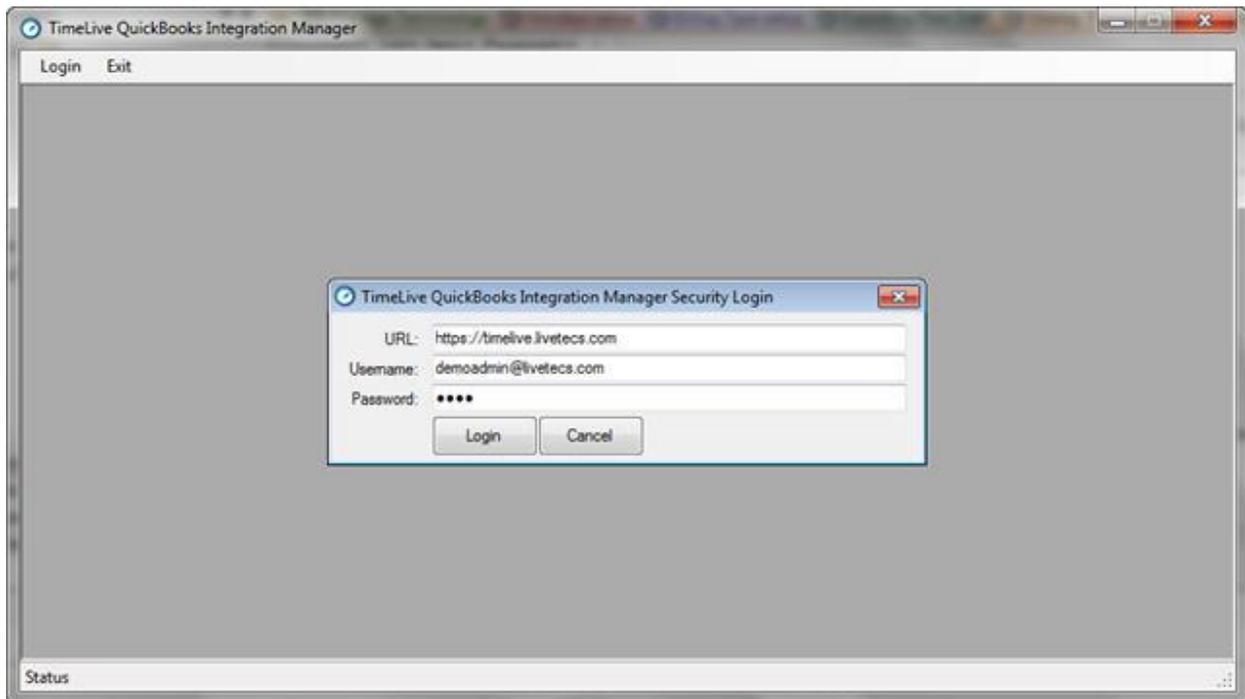
Before attempting to integrate with TimeLive, follow the steps below to ensure QuickBooks is properly configured for integration.

1. Launch **[QuickBooks]**
2. Open a company file.
3. When you integrate with TimeLive, you will transfer data to and from the open QuickBooks company file.
4. If a dialog box displays indicating that TimeLive is attempting to access the QuickBooks company file without a certificate: a. Select the **[Yes], [Always]** button. This will allows TimeLive to access the company file for data transfer purposes.

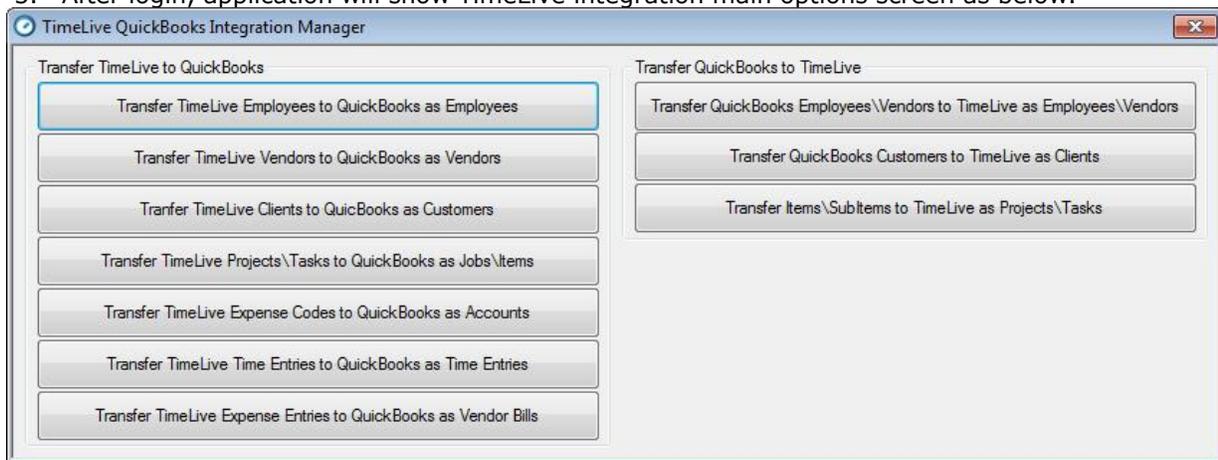
## Launching the Module:

1. To launch the integration module:
  - Double-clicking a shortcut name **[TimeLive Quickbooks Integration Manager]** created during installation
  - Selecting **[TimeLive QuickBooks Integration Manager]** from the Windows Start menu.

2. On login window, enter **[TimeLive URL]** which you are using to access your TimeLive application, TimeLive username and password.



3. Click on **[Login]** button to launch Integration tool.
4. When a QuickBooks dialog box stating the module is attempting to access the company file displays, enable the check box labeled **[Allow]** this application to access. This will give TimeLive permission to transfer employee and vendor data to the company file. Select the **[Yes]** or **[Always]**. Select **[Yes]** if asked to confirm. The main **[TimeLive Integration Manager for QuickBooks]** window displays.
5. After login, application will show TimeLive integration main options screen as below.



## TimeLive QuickBooks Integration Manager System Requirements

Each computer with [TimeLive QuickBooks Integration Tool] must meet the following requirements:

### 1. Hardware:

- Pentium 500 MHz CPU or equivalent
- 512 MB memory

- 50 MB available disk space
- Screen resolution of 1024 x 768 or higher

**Operating system:**

One of the following:

- Windows Server 2008 (R1/R2)
- Windows 2003
- Windows XP Professional SP2
- Windows Vista
- Windows 7

**Software:**

One of the following:

- QuickBooks Pro or Premier U.S. Edition 2006 or later
- QuickBooks Pro or Premier Canadian Edition 2006 or later
- QuickBooks Pro or Premier UK Edition 2008 or later
- QuickBooks Enterprise Solutions U.S. Edition 6.0 or later
- QuickBooks Premier Canadian Multicurrency Edition or later

## Defining the Relationship between Data Structures

### Understanding Project / Task relationship with QuickBooks:

Defining the Relationship between Data Structures Before using the integration module to transfer data, you must determine how the data structure in TimeLive relates to the data structure in QuickBooks. Understanding the Relationship between Data Structures When transferring certain data types, you must define how the data structure in TimeLive relates to the data structure in QuickBooks. When transferring **[project]** data from TimeLive to QuickBooks, the relationship tells the integration module where the projects and tasks should be transferred to in QuickBooks. For example, TimeLive **[Projects]** can be transferred to QuickBooks as **[Jobs]** or as **[Items]**. If the integration module is configured to transfer **[Projects]** as **[Jobs]**, then TimeLive Tasks can be transferred as **[Sub Jobs]** or **[Items]**. Depending on the selection data.

### Understanding Time Entries relationship with QuickBooks:

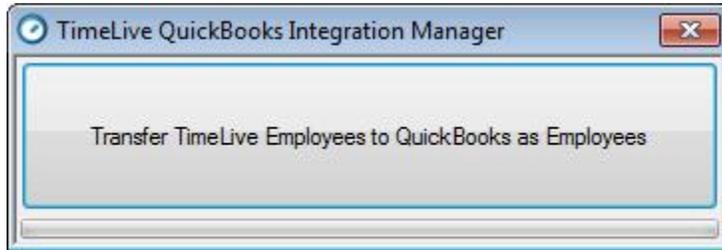
When transferring **[time entries]**, the integration module will use the specified relationship to locate the projects and tasks selected for the time entries in QuickBooks. For example, if a TimeLive **[project]** exists in QuickBooks as a **[job]**, you would typically assign a relationship between **[Projects]** and **[Jobs]**. When transferring a time entry for that project, the wizard will then attempt to locate the **[project]** in the QuickBooks **[Jobs]** list. Once the **[project]** is found as a job, the time entry can be associated with the **[job]** and will be successfully transferred

## Transferring Employees

To transfer **[Employees records from TimeLive to QuickBooks]**, just click on **[Transfer TimeLive Employees to QuickBooks as Employees]** button in main option screen of integration tool.

## Steps for Transfer:

1. Click on **[Transfer TimeLive Employees to QuickBooks as Employee]** button



2. After successful, application will show Successful transferred message.

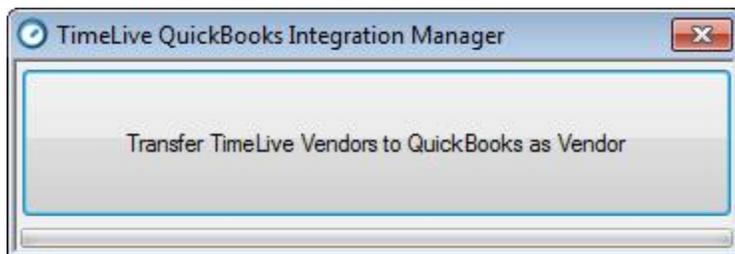
## Transferring Vendors"

To transfer **[Vendors records from TimeLive to QuickBooks]**, just click on **[Transfer TimeLive Vendors to QuickBooks as Vendors]** button in main option screen of integration tool.

You can define an **[Employee]** as **[Vendor]** in TimeLive by checking on **[Is Vendor]** field in **[Admin Options]**-->**[Employee Types]**. And then you can assign that **[Employee Type]** to your user who should be treated as **[Vendor]**.

## Steps for Transfer:

1. Click on **[Transfer TimeLive Vendors to QuickBooks as Vendor]** button



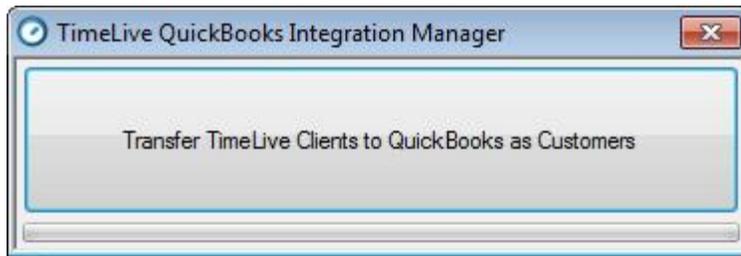
2. After successful, application will show Successful transferred message.

## Transferring Customers

To transfer **[Clients/Customers records from TimeLive to QuickBooks]**, just click on **[Transfer TimeLive Clients to QuickBooks as Customers]** button in main option screen of integration tool.

## Steps for Transfer:

1. Click on [**Transfer TimeLive Clients to QuickBooks as Customers**] button.



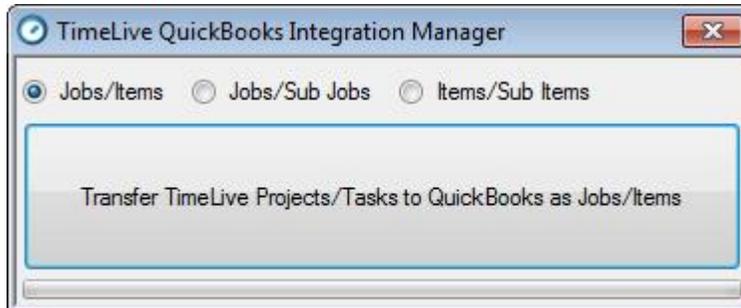
2. After successful, application will show Successful transferred message.

## Transferring Projects/Tasks

To transfer [**Projects/Tasks records from TimeLive to QuickBooks**], just click on [**Transfer Project/Tasks to QuickBooks as Jobs/Items**] button in main option screen of integration tool.

### Steps for Transfer:

1. Select any mapping option of TimeLive Project / Tasks to QuickBooks which you want in this transfer.
  - **Jobs / Items** (Projects Tasks will be transferred as [**Jobs/Items**] in QuickBooks
  - **Jobs / Sub Jobs** (Project Tasks will be transferred as [**Jobs/Sub Jobs**]
  - **Items / SubItems** (Project will be transferred as [**Items/Sub Items**]
2. Click on [**Transfer TimeLive Project/Tasks to QuickBooks as Jobs/Items**] button.



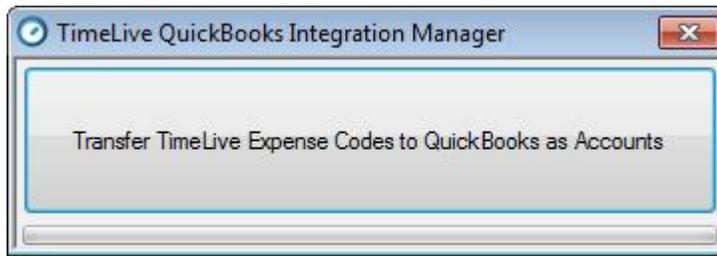
3. After successful, application will show Successful transferred message.

## Transferring Expense Codes

To transfer [**Clients/Customers**] records from TimeLive to QuickBooks, just click on [**Transfer TimeLive Expense Codes to QuickBooks as Accounts**] button in main option screen of integration tool.

### Steps for Transfer:

1. Click on **[Transfer TimeLive Expense Codes to QuickBooks as Accounts]** button.



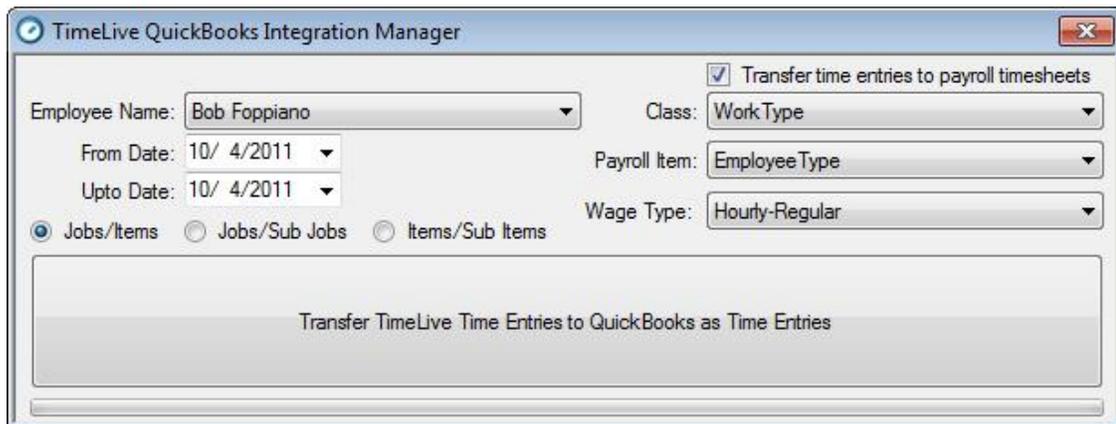
2. After successful, application will show Successful transferred message.

## Transferring Time Entries

To transfer **[Time Entries]** records from TimeLive to QuickBooks, just click on Transfer **[TimeLive Time Entries to QuickBooks as Time Entries]** button in main option screen of integration tool.

### Steps for Transfer:

1. Select **[Employee Name]** if you want to transfer any selected employees timesheet. Just select **[All]**, if you want to select time entries of all employees.
2. Select **[start date]** and **[end date]**



3. Select type of mapping for your **[Project / Tasks]** with QuickBooks which you used while transferring your projects / tasks to QuickBooks
  - **Jobs / Items** (Projects Tasks will be transferred as "Jobs/Items" in QuickBooks
  - **Jobs / Sub Jobs** (Project Tasks will be transferred as "Jobs/Sub Jobs"
  - **Items / SubItems** (Project will be transferred as "Items/Sub Items"
4. Tick on "Transfer time entries to payroll timesheets", if you want to transfer TimeLive time entries with payroll related items.
5. Select mapping of QuickBooks **[Class Items]** with TimeLive data. You can select either of these option for mapping of Class data.
  - <None>
  - Cost Center
  - Department
  - Employee Type
  - Milestone
  - Work Type

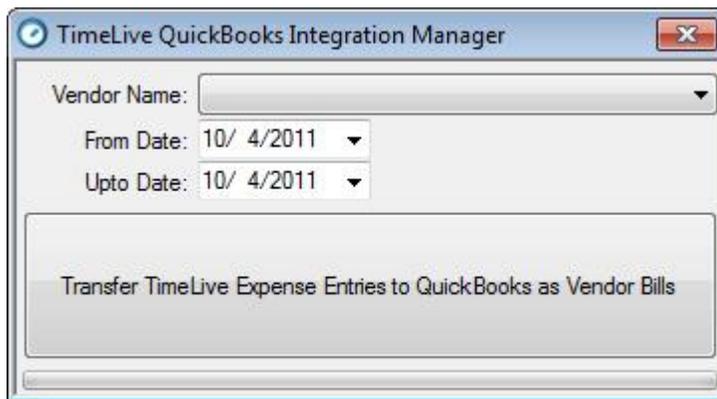
6. Select mapping of QuickBooks [**Payroll Item**] mapping with TimeLive data. You can select either of these option for mapping of Payroll Items data.
  - <None>
  - Cost Center
  - Department
  - Employee Type
  - Milestone
  - Work Type
7. Select [**Wage Type**] which you want to be populated with your time entries
8. Click on [**Transfer TimeLive Expense Codes to QuickBooks as Accounts**] button.
9. After successful, application will show Successful transferred message.

## Transferring of Expense Entries as Vendor Bills

To transfer [**Expense Entries**] records from TimeLive to QuickBooks as [**Vendor Bills**], just click on [**Transfer TimeLive Expense Entries to QuickBooks as Vendor Bills**] button in main option screen of integration tool.

### Steps for Transfer:

1. Select [**Vendor Name**] if you want to transfer any selected vendor expense sheet. Just select All, if you want to select time entries of all vendors.
2. Select [**start date**] and [**end date**]



3. Click on [**Transfer TimeLive Expense Entries to QuickBooks as Vendor Bills**] button.
4. After successful, application will show Successful transferred message.

## Exporting Time to QuickBooks

### Overview:

The QuickBooks Pro product has the capability of importing data from an external source. Data can include lists that correspond to QuickBooks' lists, budgets, and individual transactions. We will be utilizing the IIF imports to facilitate the importing of time data into QuickBooks. This is facilitated by creating a comma (or tab) separated file in a format that QuickBooks can understand (the QuickBooks IIF format). This format includes the use of column heading tags (keywords) and row heading tags to help identify the beginning and end of each transaction.

### IIF File Naming:

When you are exporting the data out of TimeLive, in preparation for the import into QuickBooks, the extension given to the file is important. QuickBooks is expecting the file extension to be "IIF" or "iif".

When on the Export -- Time screen, one of the options is to supply the output filename. You can at this point provide the appropriate the file name with IIF extension.

For example, an appropriate file name may look like: june\_time.iif

TimeLive --> Quickbooks Field Mapping (Time Entry Import) :

- a. TimeLive Project Clients --> Quickbooks Customer
- b. TimeLive Employee --> Quickbooks Employee
- c. TimeLive Billable Task Flag --> Quickbooks Billable Flag
- d. TimeLive Task Code --> Quickbooks Service Items

**Mapping Detail: TimeLive-->Quickbooks:**

1. TimeLive Project Clients --> Quickbooks Customer
2. TimeLive Employee --> Quickbook Employee
3. TimeLive Billable Task --> Quickbooks billable
4. TimeLive Task Code --> Quickbooks Service Items

| Project Task List |               |                          |             |           |         |          |  |      |        |
|-------------------|---------------|--------------------------|-------------|-----------|---------|----------|--|------|--------|
| Id                | Task Code     | Task Name                | Assigned By | Deadline  | Status  | Priority |  | Edit | Delete |
|                   | SimulationDev |                          |             |           |         |          |  | ✓    | ✗      |
| 295               | SimulationDev | IPCC w/Subgrid Orography | John Ramos  | 7/19/2009 | Started | Urgent   |  |      |        |
| 296               | SimulationDev | T170 Tuning              | John Ramos  | 7/19/2009 | Started | Urgent   |  |      |        |

Preparing Data for input into QuickBooks:

The following steps may be followed to:

- Export Data from TimeLive in a Quickbooks ready format (IIF).
- Import the exported time data into Quickbooks.
- Define billing rates for **[Items]** in Quickbooks.
- Generate an Invoice in Quickbooks based on imported TimeLive Time data.

## Step 1: Export Data from TimeLive in a Quickbooks ready format

The following steps may be followed to:

- Navigate to **[Admin Options]**-->**[Import / Export CSV/Quickbooks]** in **[Import/Export]** section.
- Select **[Import/Export]** type as "Export"
- Select **[File Type]** as "Quickbooks"
- Select **[Data Source]** as "Time Entry"

- Define your data export start date and end date.
- Select your project whose time entries you want to export.

**CSV/Quickbooks(IIF) Import Export**

Import / Export:  Export  Import

File Type:  CSV  Quickbooks (IIF)  Microsoft Project

Data Source: Time Entry

Start Date: 12/4/2012

End Date: 12/4/2012

Select Employees: <All>

Select Project: <All>

Billing Type:  Both  Billable  Non-Billable

**Proceed**

- Now click on **[Proceed]** button.
- Give some best name for your exported IIF file and note down your IIF file saved location.

**Save As**

New Volume (D:) > Import

Organize Views New Folder

Name Date ... Type Size

This folder is empty.

Favorite Links: Recent Places, Desktop, Computer, Recently Changed, Pictures, Music, Searches, Public

File name: QBRefinedJune.iif

Save as type: IIF File

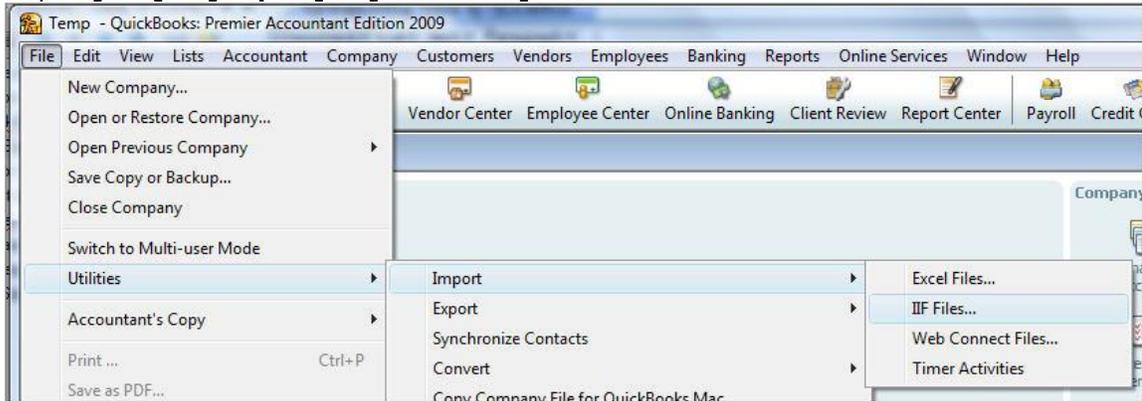
Hide Folders Save Cancel

- This is end of exporting time data to Quickbooks IIF File.

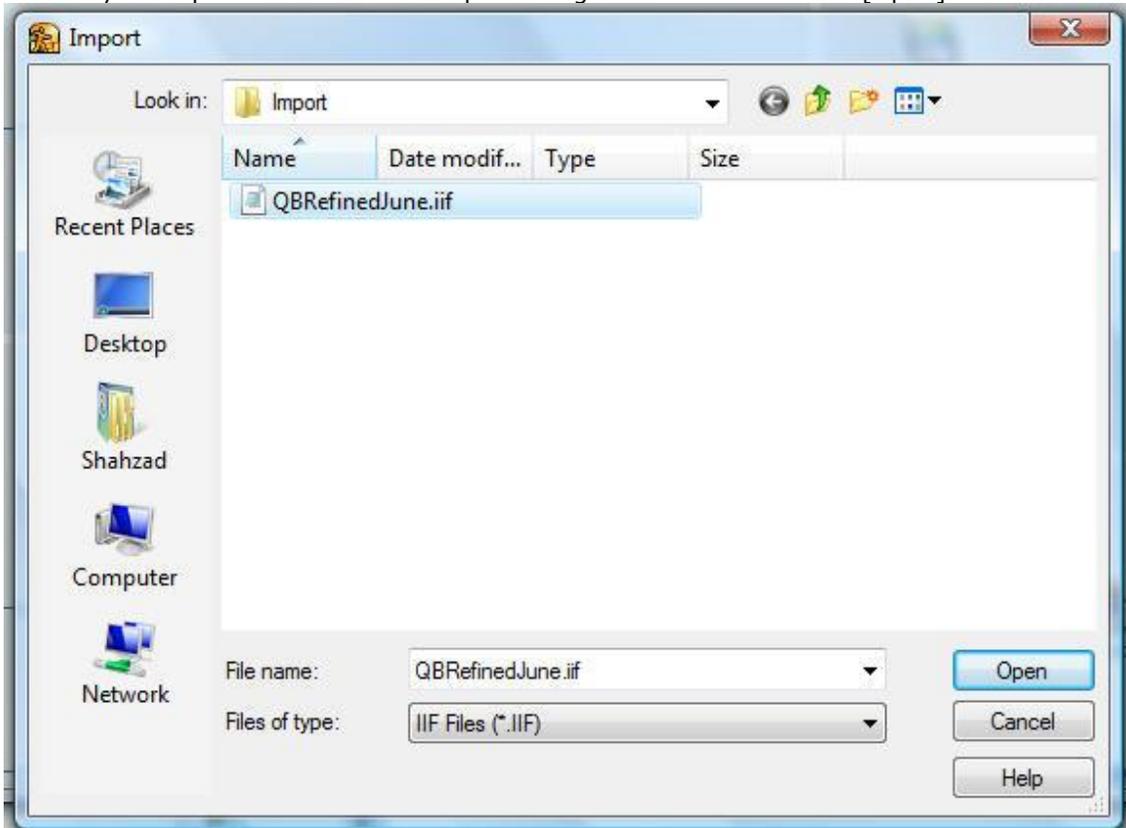
## Step 2: Import the exported time data into Quickbooks.

The following steps may be followed to:

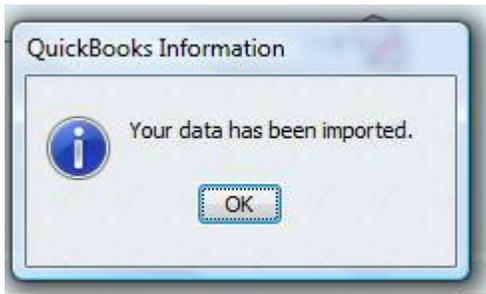
- Launch Quickbooks
- Open **[File]**-->**[Import]**-->**[IIF Files...]**



- Select your exported IIF File in File open dialog box and then click on [Open].

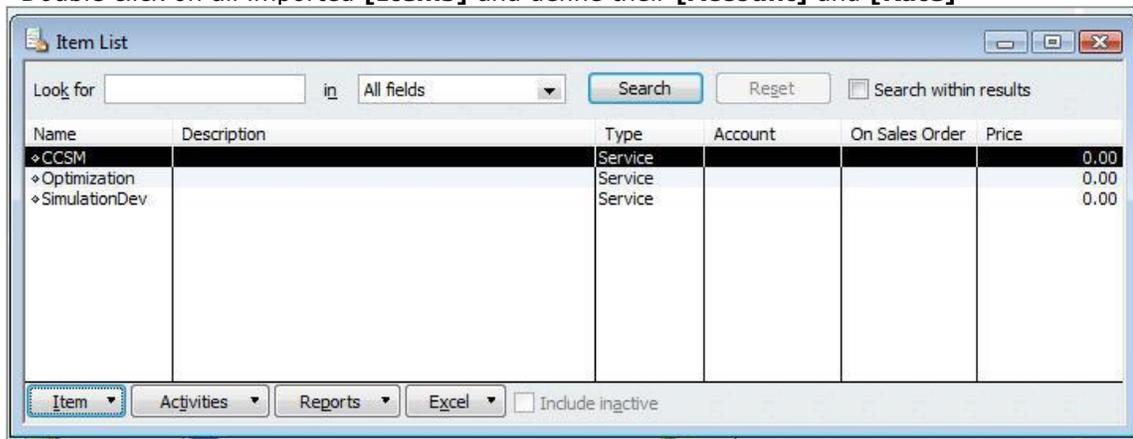


- Quickbooks will show completed message after import.



### Step 3: Define billing rates for [Items] in Quickbooks.

- Open [Customers]-->[Item List] in Quickbooks.
- Double click on all imported [Items] and define their [Account] and [Rate]



- Define item's [Billing Rate] and [Account] in Quickbooks. Click on [OK] when done.

**Edit Item**

Type: Service (Use for services you charge for or purchase, like specialized labor, consulting hours, or professional fees.)

Item Name/Number: CCSM (Subitem of: )

Unit of Measure: Enable...

Item is inactive

This service is used in assemblies or is performed by a subcontractor or partner

Description: [Empty] Rate: 120.00 Account: Consulting Income

[How can I set rates by customers or employees?](#)

Buttons: OK, Cancel, Custom Fields, Spelling

- Define billing rate and Account of all TimeLive imported items.

**Item List**

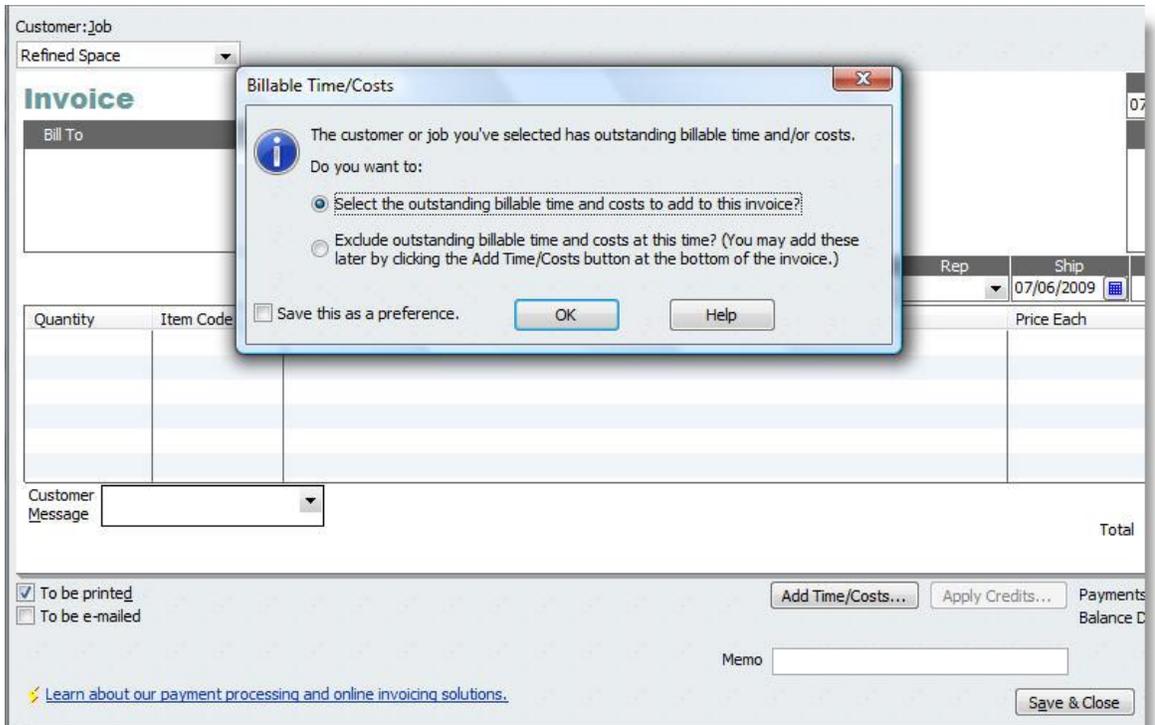
Look for: [Empty] in: All fields Search Reset  Search within results

| Name          | Description | Type    | Account           | On Sales Order | Price  |
|---------------|-------------|---------|-------------------|----------------|--------|
| CCSM          |             | Service | Consulting Inc... |                | 120.00 |
| Optimization  |             | Service | Consulting Inc... |                | 140.00 |
| SimulationDev |             | Service | Consulting Inc... |                | 180.00 |

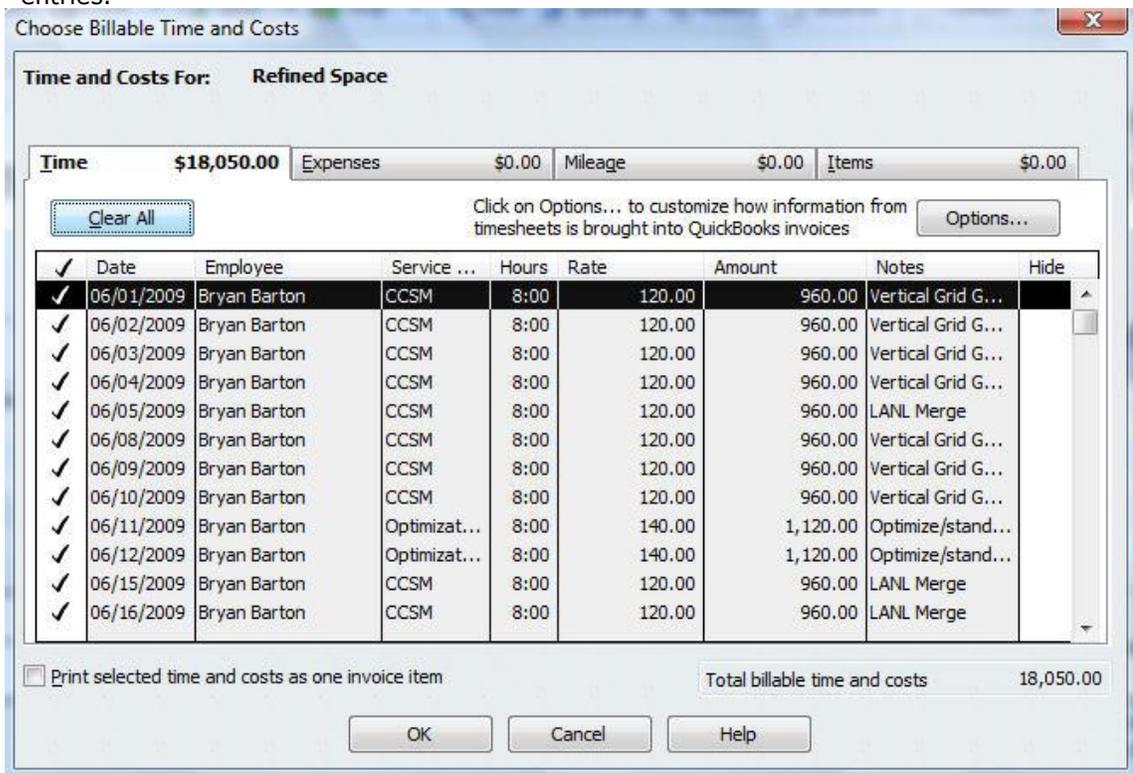
Buttons: Item, Activities, Reports, Excel,  Include inactive

#### Step 4: Generate an Invoice in Quickbooks based on imported TimeLive Time data

- Open **[Customers]**-->**[Create Invoices]** in Quickbooks.
- Select your customer whose Invoice you want to create in **[Customer:Job]** dropdown.
- Quickbooks will prompt for importing all pending time and cost items.

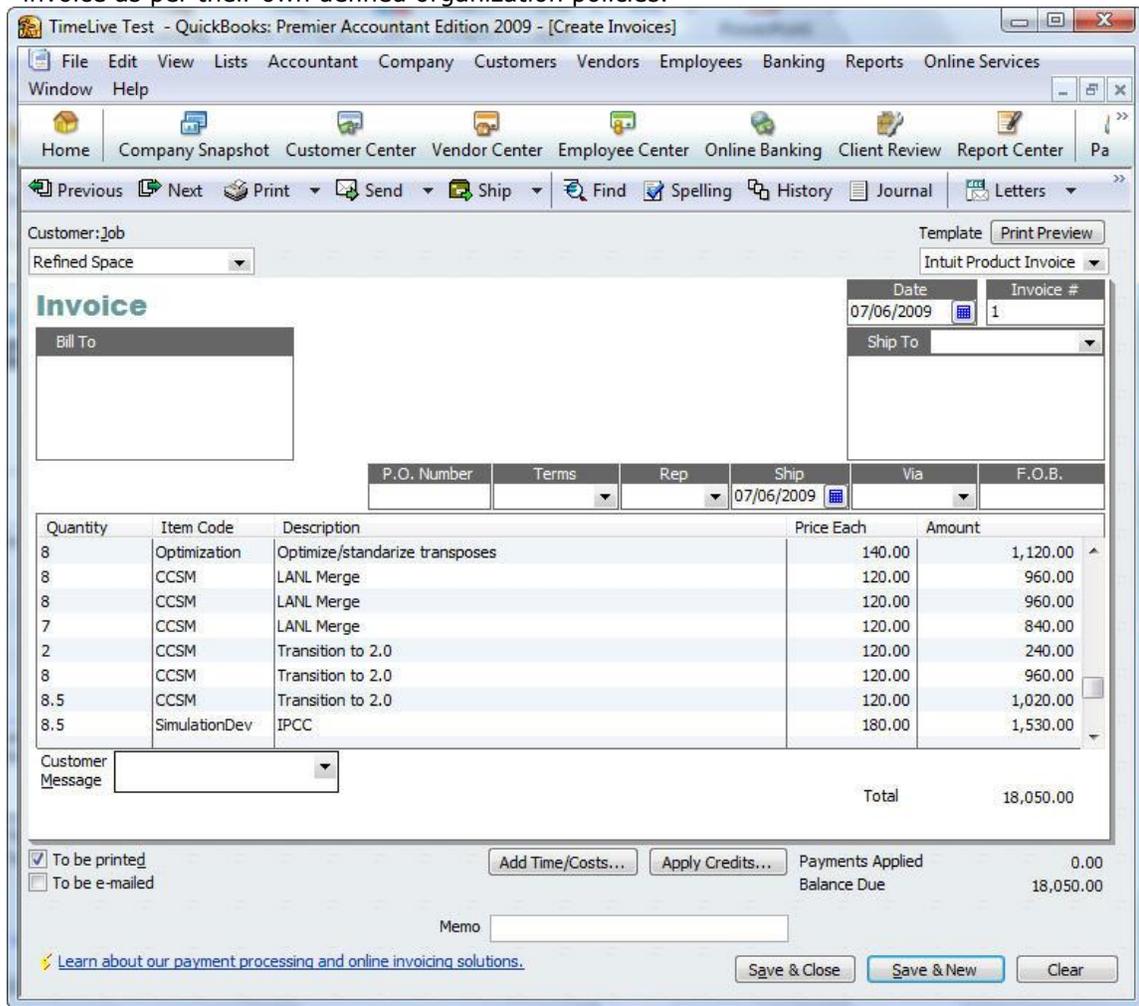


- Click on **[OK]** to import all outstanding billable time and cost in Quickbooks Invoice.
- Quickbooks now show all outstanding billing items. Just click on **[Select All]** to select all time entries.



- Click on **[OK]** to import all selected time records in Quickbooks.

- Quickbooks will import all time records in Customer Invoice. Accountant can then proceed this invoice as per their own defined organization policies.



## QuickBooks Online Integration

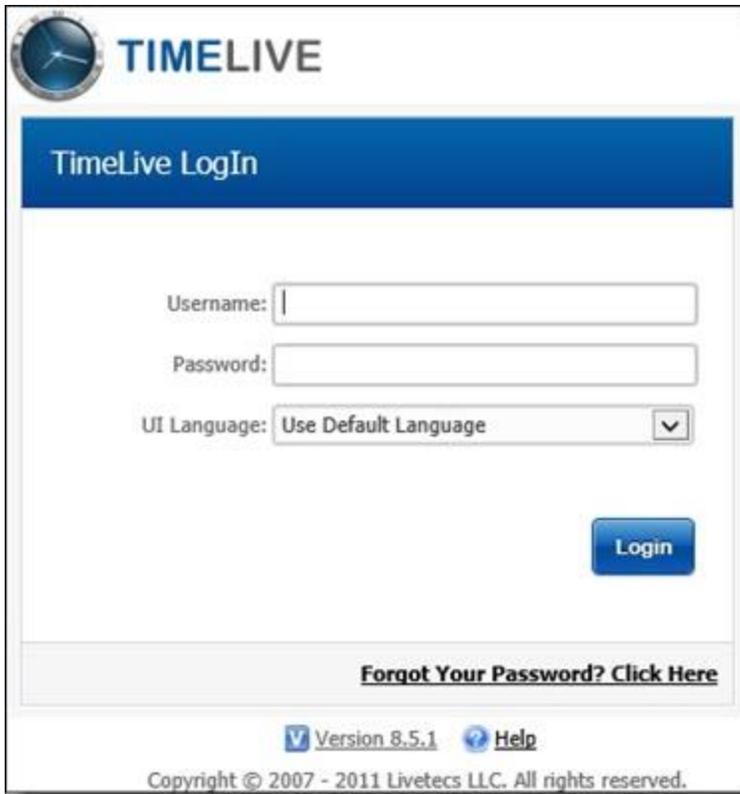
TimeLive Hosted Account can easily be integrated with QuickBooks online.

To Integrate TimeLive with QuickBooks, Administrator must have existing TimeLive Hosted Account and QuickBooks Intuit Account.

### Setup:

Setting up TimeLive require few simple steps. which are mentioned below,

1. Login to **TimeLive Hosted Account**.



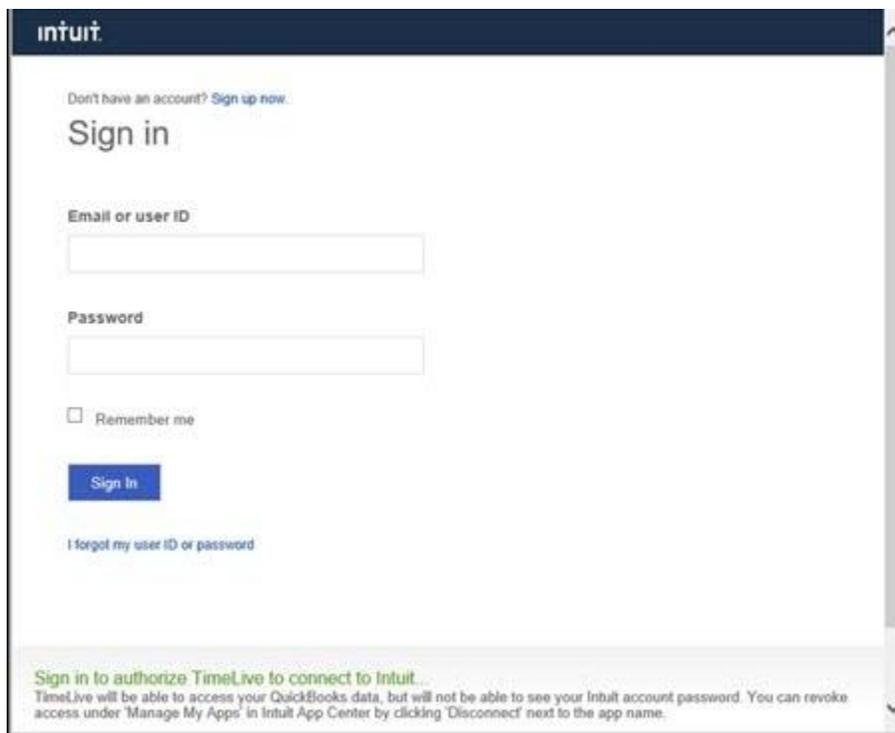
2. Navigate to **Admin Options -- QuickBooks Online Integration**



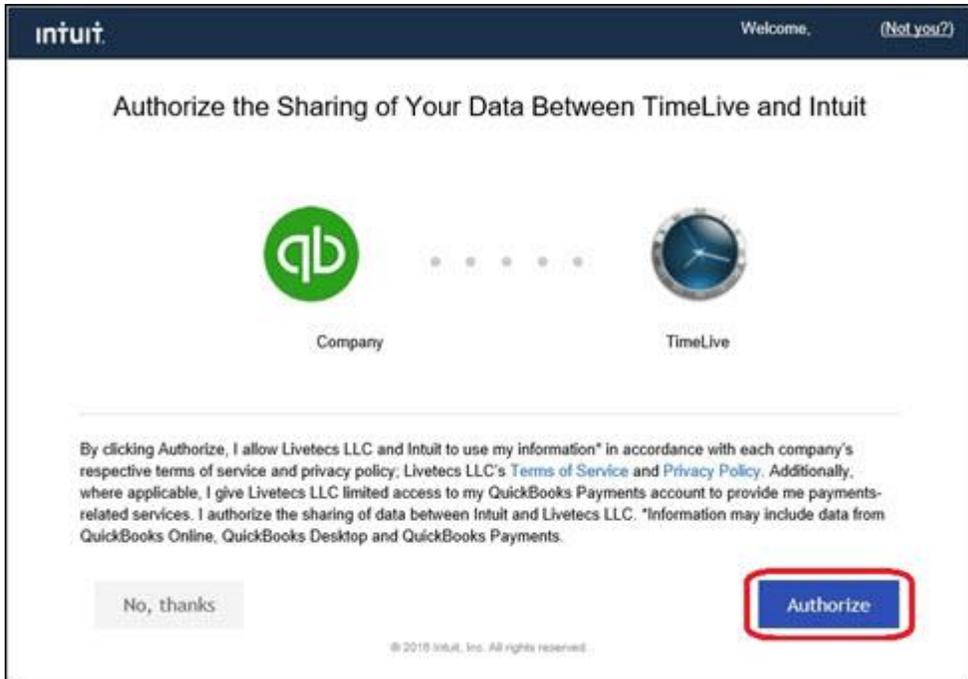
3. Click on "**Connect to QuickBooks**" Button



4. Login to **QuickBooks Intuit Account**



5. Click **Authorize** Button to Integrate both TimeLive and QuickBooks Account



Now, you are able to **Import/Export** your data between both accounts.

| QuickBooks Online Integration |  |                          |
|-------------------------------|--|--------------------------|
| Export TimeLive to QuickBooks | Import QuickBooks to TimeLive  |                          |
| Entitiy                       | Description  |                          |
| Clients                       | Transfer Timelive Client into QuickBooks Customer.   | <input type="checkbox"/> |
| Employees                     | Transfer Timelive Employee into QuickBooks Employee.   | <input type="checkbox"/> |
| Vendors                       | If you have Vendors that work for you as a contractors, and also want to track their time for export to QuickBooks, check this box. This will export vendor from TimeLive into QuickBooks. | <input type="checkbox"/> |
| Project / Task                | Transfer Timelive Project/Task into QuickBooks Job/Item.   | <input type="checkbox"/> |
| Time Entries                  | Transfer Timelive Time Entries into QuickBooks Time Activity.  | <input type="checkbox"/> |

**Export**

Administrator can export **Time Entries** of **Specific Employee** to QuickBooks with **Date Range**. See below image.

| QuickBooks Online Integration |  |                                     |
|-------------------------------|--|-------------------------------------|
| Export TimeLive to QuickBooks | Import QuickBooks to TimeLive  |                                     |
| Entity                        | Description  |                                     |
| Clients                       | Transfer Timelive Client into QuickBooks Customer.   | <input type="checkbox"/>            |
| Employees                     | Transfer Timelive Employee into QuickBooks Employee.   | <input type="checkbox"/>            |
| Vendors                       | If you have Vendors that work for you as a contractors, and also want to track their time for export to QuickBooks, check this box. This will export vendor from TimeLive into QuickBooks. | <input type="checkbox"/>            |
| Project / Task                | Transfer Timelive Project/Task into QuickBooks Job/Item.   | <input type="checkbox"/>            |
| Time Entries                  | Transfer Timelive Time Entries into QuickBooks Time Activity.  | <input checked="" type="checkbox"/> |

**Employees:**  
 John Benson   
 From Date: 10/3/2015   
 Upto Date: 10/3/2015

During **Import**, Administrator can select option of **Job / Sub-Job** or **Item / Sub-Item**

| QuickBooks Online Integration   |  |                                       |
|---|--|---------------------------------------|
| Export TimeLive to QuickBooks   |  | Import QuickBooks to TimeLive         |
| Entity  | Description  |                                       |
| Customers   | Transfer QuickBooks Customer into TimeLive Client.   | <input type="checkbox"/>              |
| Employees   | Transfer QuickBooks Employee into TimeLive Employee.   | <input type="checkbox"/>              |
| Vendors   | If you have Vendors that work for you as a contractors, and also want to track their time for export to QuickBooks, check this box. This will export vendor from QuickBooks into TimeLive. | <input type="checkbox"/>              |
| Job / Item  | Transfer QuickBooks Job/Item into Timelive Project/Task.   | <input checked="" type="checkbox"/>   |
| <input type="radio"/> Job / Sub-Job <input type="radio"/> Item / Sub-Item |  |                                       |
|   |  | <input type="button" value="Import"/> |

## Configuring Active Directory Authentication

You can configure TimeLive to authenticate the requester login with the active directory (AD). This provides you an advantage of not having to remember too many passwords. For this, you should configure AD authentication, then any password change that is made in the AD will also reflect in TimeLive. So the requesters can login using the login name and password of the system.

## TimeLive Active Directory integration concepts:

TimeLive supports two types of active directory authentication.

1. First option is automated way through which user will be automatically add as employee in TimeLive, if that particular user is member of corresponding mapped group in Active Directory.
  - Using role management in admin options, you can configure TimeLive role mapping with Active Directory group. User will automatically assigned in that role in TimeLive if he is member of corresponding group member in active directory.
  - For example, if an employee is member of TimeLive User group in [Active Directory], he will be automatically add as employee in timelive on first login with [User] role in TimeLive.
  - By default, TimeLive come with two TimeLive roles with their active directory corresponding roles mapping. You can define your AD Group in TimeLive Roles management page.
    1. AD Group [**TimeLiveAdministrator**] --> map to TimeLive [**Administrator**] role.
    2. AD Group [**TimeLiveUser**] --> map to TimeLive [**User**] role.
2. Second way is to add all your employee manually in TimeLive. Administrator can define active directory username of employees during new employee creation. After adding employee with their active directory username, they can login in TimeLive using their active directory username and password.

## **Step by step: Active Directory integration:**

TimeLive active directory integration required setup on two places. One is in active directory and second is defining server parameters in system configuration pages.

### **Step1: Changes required in Active Directory:**

Here are the steps which are required to be done on active directory side.

1. IT Administrator should decide first, exactly which Active Directory username will work as TimeLive Administrator. In this help section, we have assume one AD user with username [**LivetecsIT**]
2. Create a new [**TimeLive Service User**]. TimeLive APIs will use this username and password to communicate to Active Directory. Create a service user with name "**timeliveserviceuser**".

**New Object - User**

Create in: livetecs2008.com/Users

First name: TimeLive Initials:

Last name: ServiceUser

Full name: TimeLive ServiceUser

User logon name: timeliveserviceuser @livetecs2008.com

User logon name (pre-Windows 2000): LIVETECS2008\ timeliveserviceuser

< Back Next > Cancel

3. Define some password for "TimeLive Service User" and make sure that **[Password never expires]** should be checked and **[User must change password at next logon]** should be unchecked.

**New Object - User**

Create in: livetecs2008.com/Users

Password:

Confirm password:

User must change password at next logon

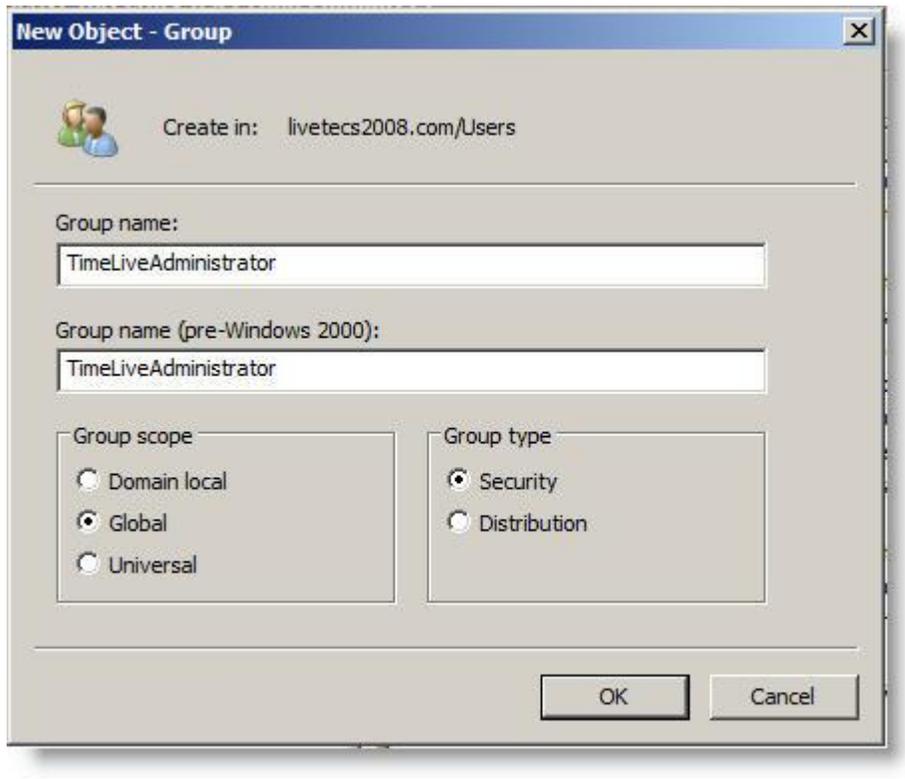
User cannot change password

Password never expires

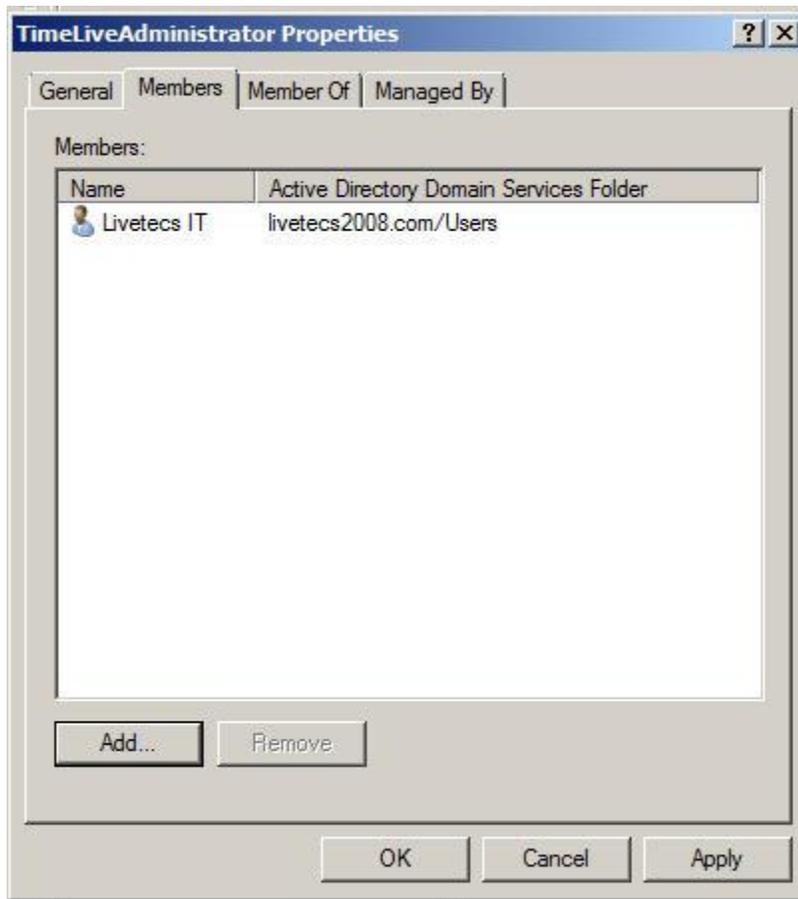
Account is disabled

< Back Next > Cancel

4. Create a new security group **[TimeLiveAdministrator]** in Active Directory.



5. Now assign your user which you want to work as TimeLive Administrator, in **[TimeLiveAdministrator]** group. This user will become **[Administrator]** in TimeLive. Make sure that this user should have **[First Name]**, **[Last Name]** and **[EmailAddress]** information are filled in Active Directory.

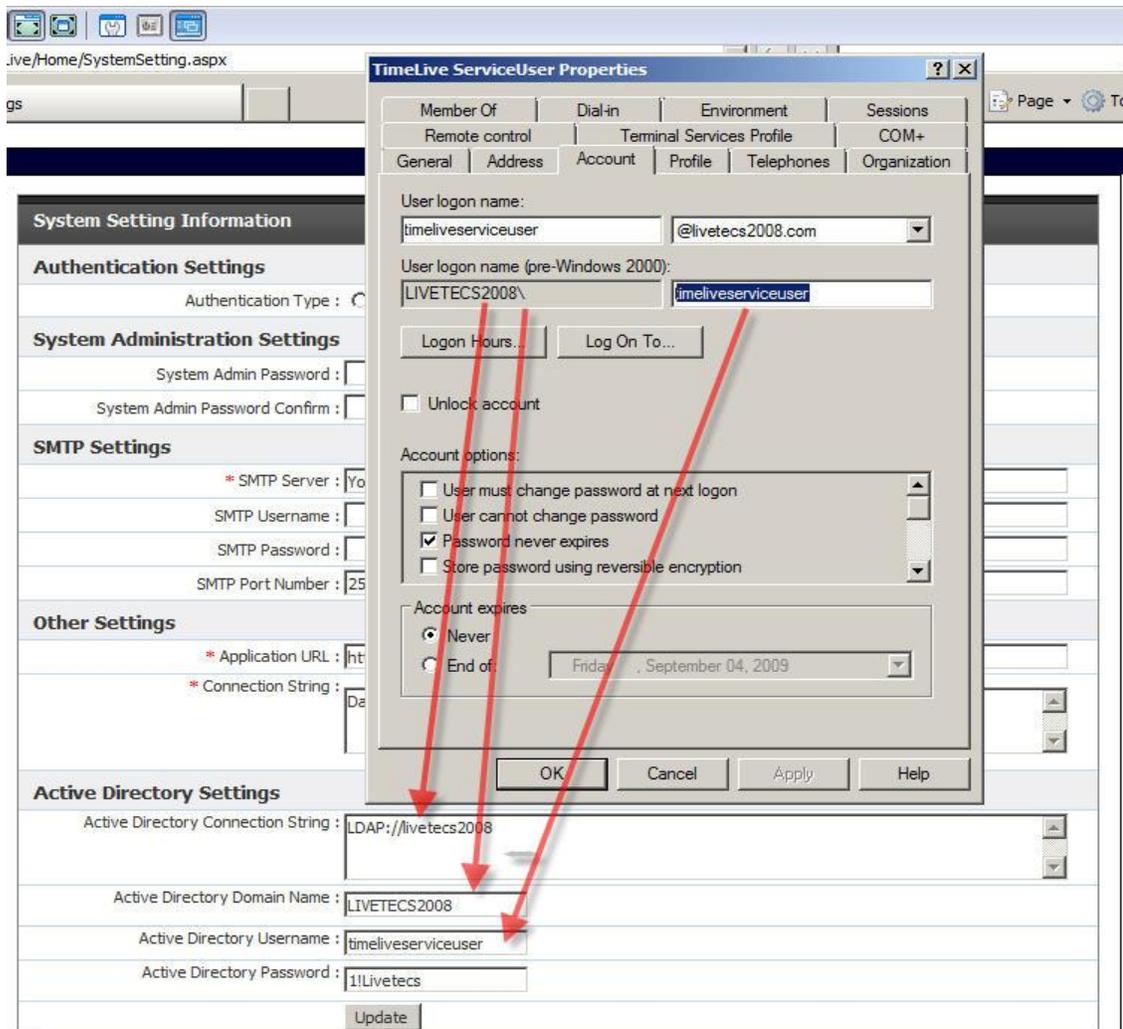


## Step 2: Changes required in TimeLive:

1. On first time execution, after database setup, TimeLive first open **[Account Add]** page where user can enter their organization and administrator user information. Do not fill this form if you are going to setup on [Active Directory] integration.
2. Open **[System Configuration]** page (<http://timeliveurl/home/systemsetting.aspx>), where you can define system level parameters like active directory integration, database connectionstring and smtp server.

[\[More about system setting page\]](#)

3. Select **[Active Directory Authentication]** checkbox to select your authentication mode as Active Directory.
4. Enter "LDAP://YourServerName" in **[Active Directory Connection String]**. Yourservername should be replaced with physical server name where Active directory is installed. Please see below screenshots to get an exact idea of which value will appear where.



5. Enter domain name in **[Active Directory Domain Name]** field. Domain name should be pre-windows 2000 server name instead of actual domain name.
6. Enter your **[TimeLive Service User]** username in **[Active Directory Username]** field. Username should be in exact same case which is in Active Directory. Make sure that your (pre-windows 2000) username and your actual user name are same.
7. Enter **[TimeLive Service User]** user's password in **[Active Directory Password]** field.
8. Click on **[Update]** to update these changes.

9. After update, TimeLive will open new account add page.

**Provide Your Information**

**Account Information (Organization Information)**

\* Organization Name: Livetecs LLC

Address1

Address2

Zipcode:

State / Province:

City

\* Country: United States

Telephone

Fax

Default Currency: US\$

User Interface Language: English (United State)

Timezone: (-7.00) Mountain Time (US & Canada)

**Login Information (This employee will be "Administrator" of TimeLive A...)**

Login: LivetecsIT

\*Email Address: LivetecsIT@livetecs.com

\* Password:

\* Verify:

Prefix: Mr.

\* First Name: Livetecs

Middle Name:

\* Last Name: IT

Sign Up

Active Directory user who is member of TimeLiveAdministrator Group in AD

10. Enter your organization information in top portion.
11. Enter **[TimeLive Administrator username]** which you earlier assigned in **[TimeLiveAdministrator]** group in Active Directory. TimeLive will automatically populate FirstName, LastName and email address from Active Directory.
12. Enter Active Directory password and verify password of **[TimeLive Administrator user]**. This should be active directory password of TimeLive administrator user.
13. Enter First Name, Middle Name and Last Name.
14. Click on **[Signup]** to complete Active directory integration steps.
15. This administrator can now sign-in in TimeLive using his **[TimeLive Admin] (LivetecsIT in above case)** active directory username and password.
16. Now administrator can add other employees using **[Administration]**-->**[Employees]** option by specifying AD user name in [User name] field.
17. New employee will be automatically add if they are member AD Group whose mapping is defined with TimeLive roles.

**Note: Migrating from standard authentication to Active Directory authentication:**

1. In case, if Active Directory is being setup for switching from already setup standard authentication to Active Directory authentication, system will redirect to login page directly instead of account add page. Administrator can login with TimeLive admin user created using instructions mentioned above.
2. Just make sure that email address of TimeLiveAdministrator user should not be already defined to some other user.
3. This administrator can now login in TimeLive using his **[TimeLive Admin] (LivetecsIT in above case)** active directory username and password.
4. After login, administrator should edit every employee which are already defined in TimeLive and change value of "username" field from their email address to Active Directory login id.
5. After having Active Directory login id in username field in employee form, employee then will be able to login using their Active Directory username and Active Directory password with their data, which they already have in TimeLive.

## Active Directory authentication with TimeLive On-Cloud

TimeLive supports single sign-on (SSO) logins through SAML 2.0/W-Federation if you're on the Professional or Enterprise plans. A SAML 2.0/W-Federation identity provider (IDP) can take many forms, one of which is a self-hosted Active Directory Federation Services (ADFS) server. ADFS is a service provided by Microsoft as a standard role for Windows Server that provides a web login using existing Active Directory credentials.

### Requirements

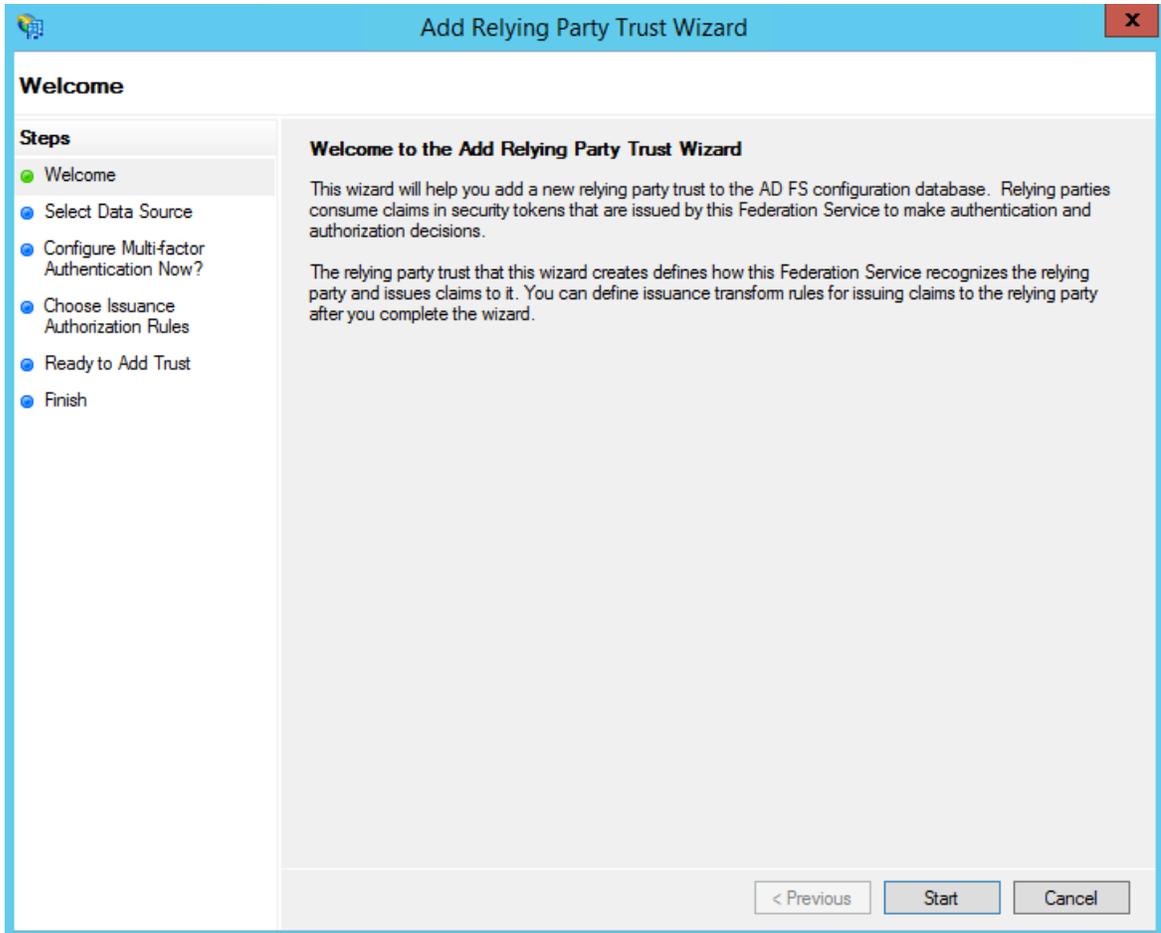
To use ADFS to log in to your TimeLive instance, you need the following components:

- An Active Directory instance where all users have an email address attribute.
- A TimeLive instance with Hosted plans.
- A server running Microsoft Server 2012 or 2008. This guide uses screenshots from Server 2012R2, but similar steps should be possible on other versions.
- A SSL certificate to sign your ADFS login page and the fingerprint for that certificate.
- If you're using host mapping in your TimeLive instance, an installed certificate for hosted SSL.

After you meet these basic requirements, you need to install ADFS on your server. Configuring and installing ADFS is beyond the scope of this guide, but is detailed in a [Microsoft KB article](#). When you have a fully installed ADFS installation, note down the value for the 'SAML 2.0/W-Federation' URL in the ADFS Endpoints section. If you chose the defaults for the installation, this will be '/adfs/ls/'.

### Step 1 - Adding a Relying Party Trust

At this point you should be ready to set up the ADFS connection with your TimeLive instance. The connection between ADFS and TimeLive is defined using a Relying Party Trust (RPT). Select the **Relying Party Trusts** folder from **AD FS Management**, and add a new **Standard Relying Party Trust** from the **Actions** sidebar. This starts the configuration wizard for a new trust.



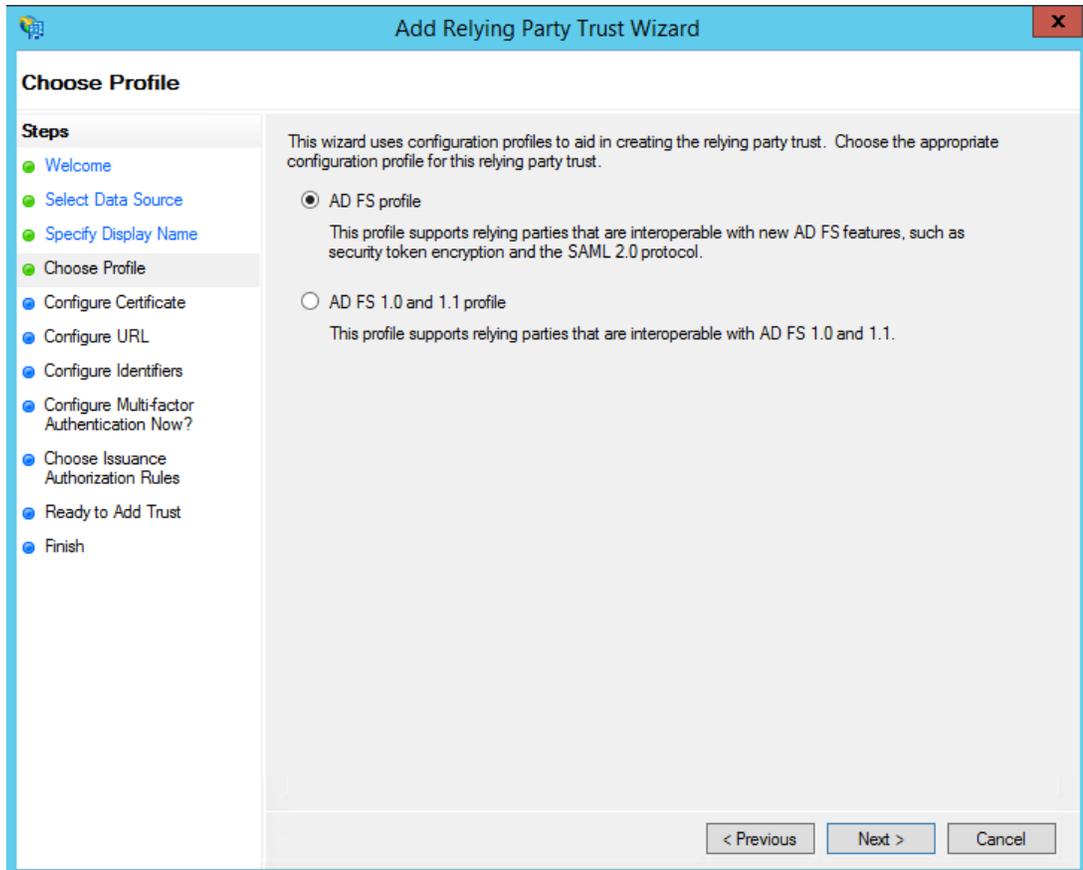
1. In the **Select Data Source** screen, select the last option, **Enter Data About the Party Manually**.

The screenshot shows a Windows-style dialog box titled "Add Relying Party Trust Wizard" with a close button (X) in the top right corner. The main area is titled "Select Data Source". On the left, a "Steps" pane lists the following steps: Welcome, Select Data Source (highlighted), Specify Display Name, Choose Profile, Configure Certificate, Configure URL, Configure Identifiers, Configure Multi-factor Authentication Now?, Choose Issuance Authorization Rules, Ready to Add Trust, and Finish. The main content area contains the instruction: "Select an option that this wizard will use to obtain data about this relying party:". There are three radio button options: 1. "Import data about the relying party published online or on a local network" (unselected). Below it is a text box for "Federation metadata address (host name or URL):" with the example "fs.contoso.com or https://www.contoso.com/app". 2. "Import data about the relying party from a file" (unselected). Below it is a text box for "Federation metadata file location:" with a "Browse..." button. 3. "Enter data about the relying party manually" (selected). Below it is the instruction "Use this option to manually input the necessary data about this relying party organization." At the bottom right, there are three buttons: "< Previous", "Next >", and "Cancel".

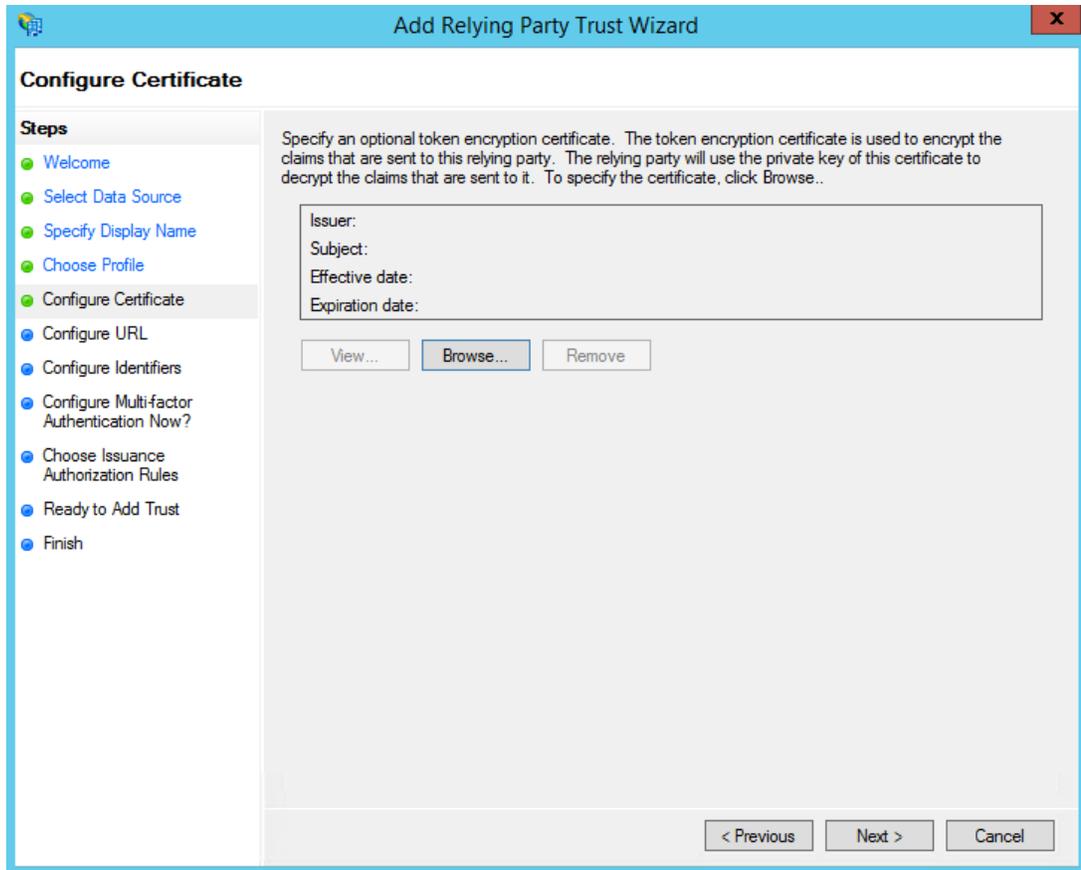
2. On the next screen, enter a **Display name** that you'll recognize in the future, and any notes you want to make.

The screenshot shows a Windows-style window titled "Add Relying Party Trust Wizard" with a close button (X) in the top right corner. The main content area is titled "Specify Display Name". On the left, a "Steps" pane lists the following steps: Welcome, Select Data Source, Specify Display Name (highlighted), Choose Profile, Configure Certificate, Configure URL, Configure Identifiers, Configure Multi-factor Authentication Now?, Choose Issuance Authorization Rules, Ready to Add Trust, and Finish. The main area contains the instruction "Enter the display name and any optional notes for this relying party." Below this, there is a "Display name:" label followed by a text input field. Underneath is a "Notes:" label followed by a larger text area with a vertical scrollbar. At the bottom right, there are three buttons: "< Previous", "Next >", and "Cancel".

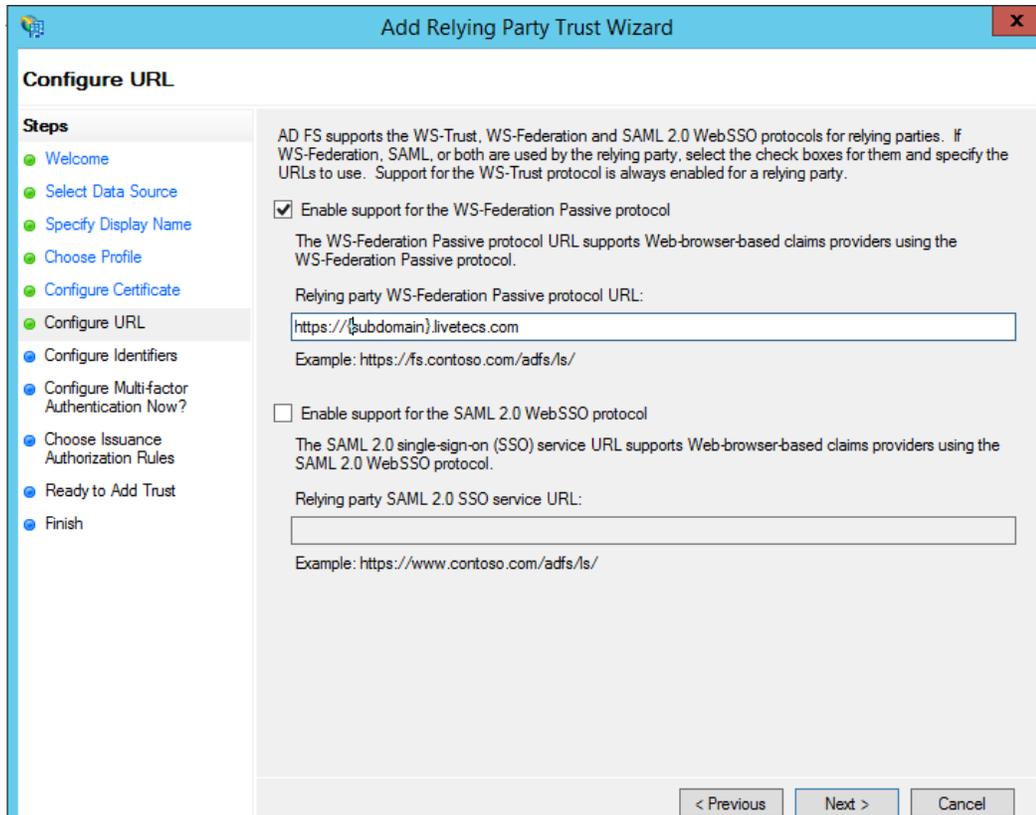
3. On the next screen, select the **ADFS FS profile** radio button.



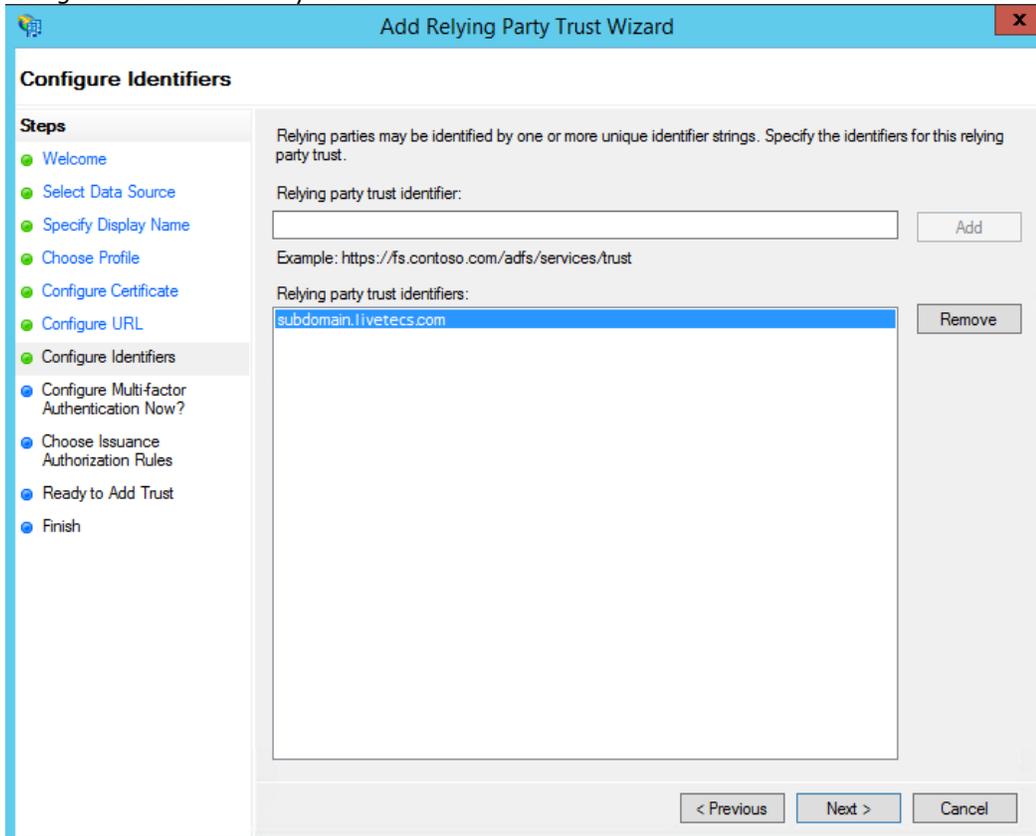
4. On the next screen, leave the certificate settings at their defaults.



5. On the next screen, check the box labeled **Enable Support for the WS-Federation Passive Protocol**. The service URL will be `https://subdomain.livetecs.com/`, replacing **{subdomain}** with your TimeLive's subdomain. Note that there's no trailing slash at the end of the URL.



6. On the next screen, add a **Relying party trust identifier** of *subdomain.livetecs.com*, replacing *subdomain* with your TimeLive subdomain.



7. On the next screen, you may configure multi-factor authentication but this is beyond the scope of this guide.

Configure multi-factor authentication settings for this relying party trust. Multi-factor authentication is required if there is a match for any of the specified requirements.

| Requirements | Users/Groups   | Global Settings |
|--------------|----------------|-----------------|
|              | Not configured |                 |
|              | Device         | Not configured  |
|              | Location       | Not configured  |

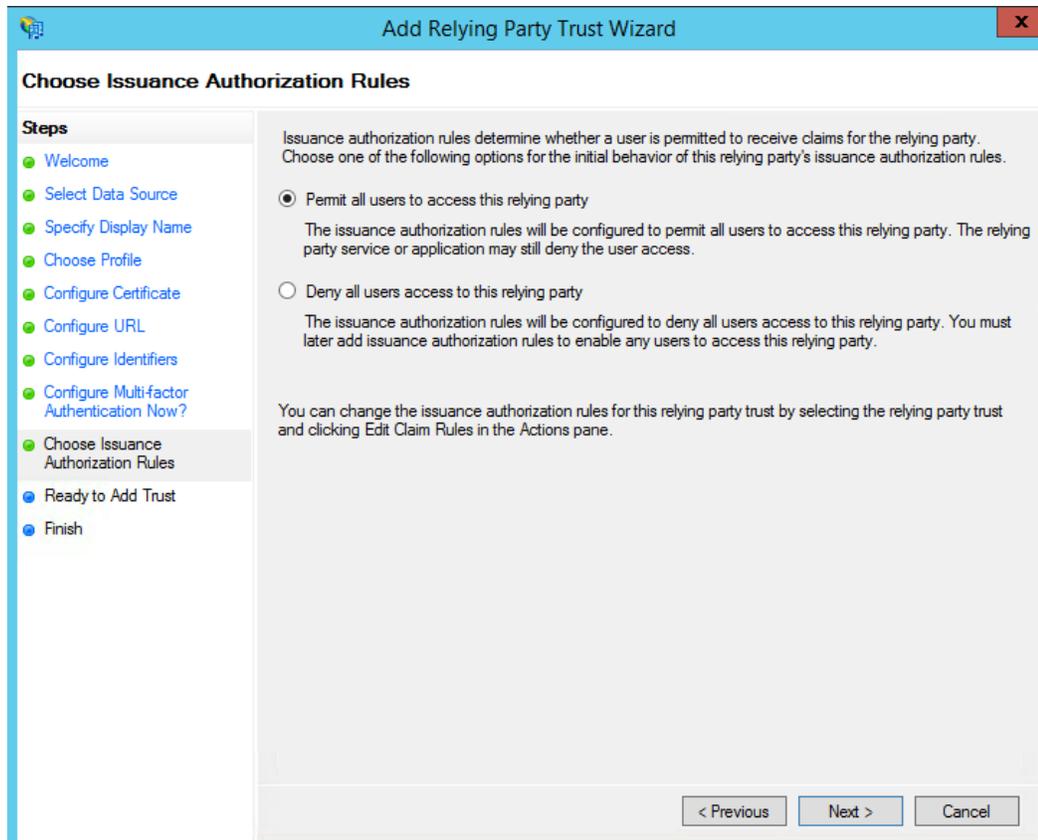
I do not want to configure multi-factor authentication settings for this relying party trust at this time.

Configure multi-factor authentication settings for this relying party trust.

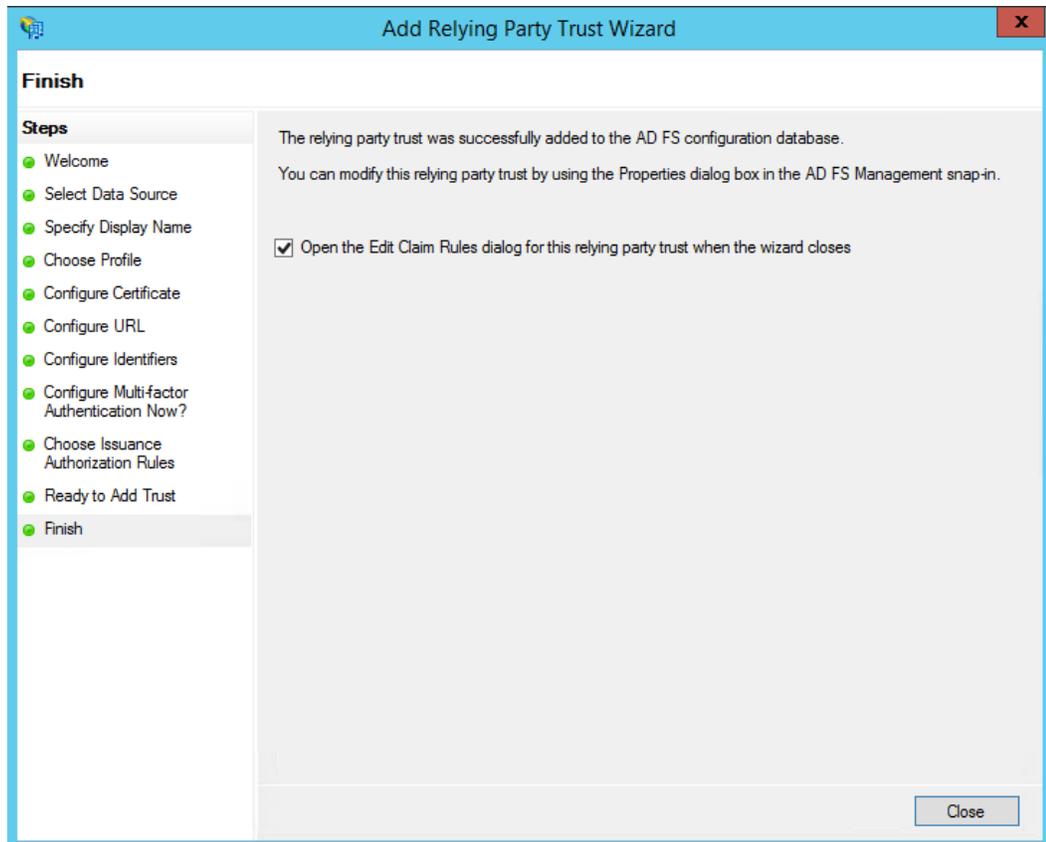
You can also configure multi-factor authentication settings for this relying party trust by navigating to the Authentication Policies node. For more information, see [Configuring Authentication Policies](#).

< Previous    Next >    Cancel

8. On the next screen, select the **Permit all users to access this relying party** radio button.

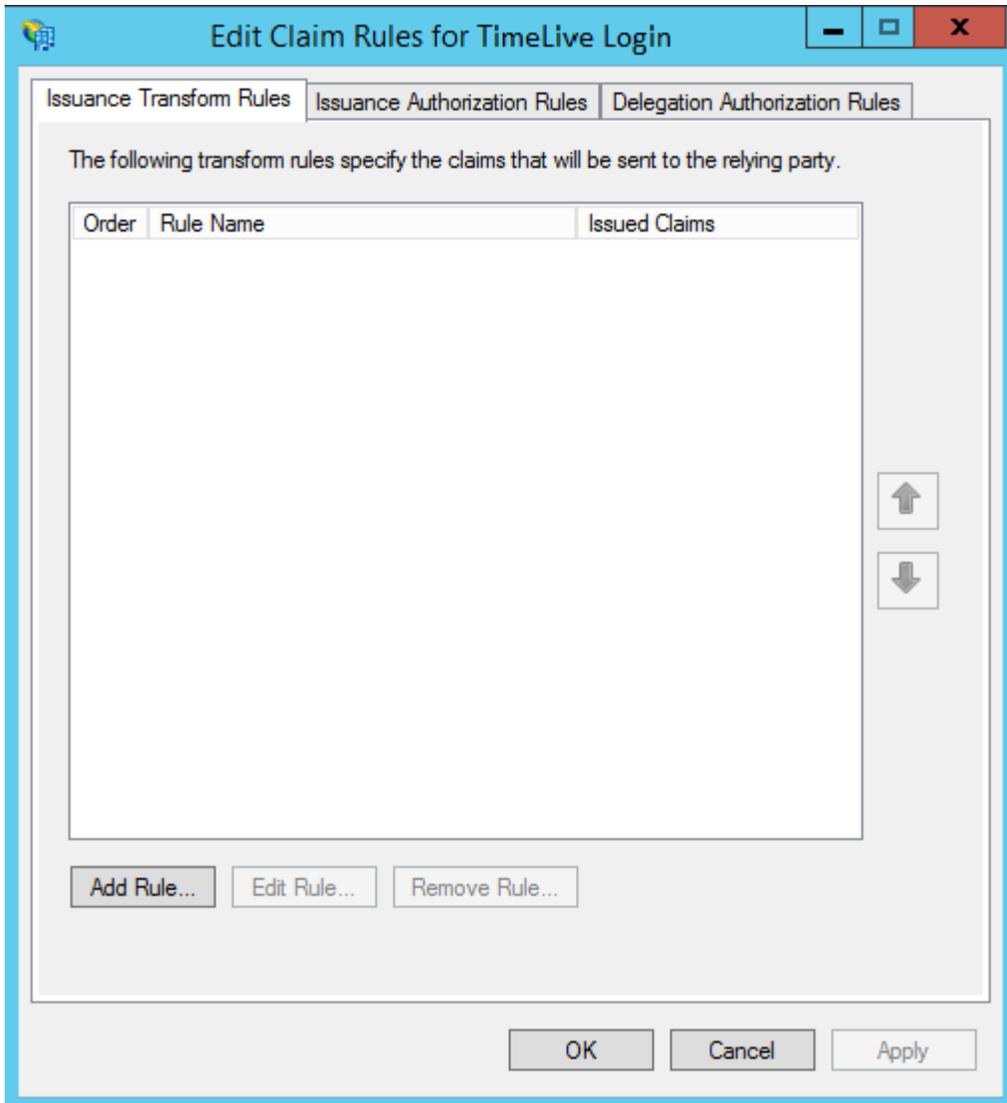


9. On the next two screens, the wizard will display an overview of your settings. On the final screen use the **Close** button to exit and open the Claim Rules editor.

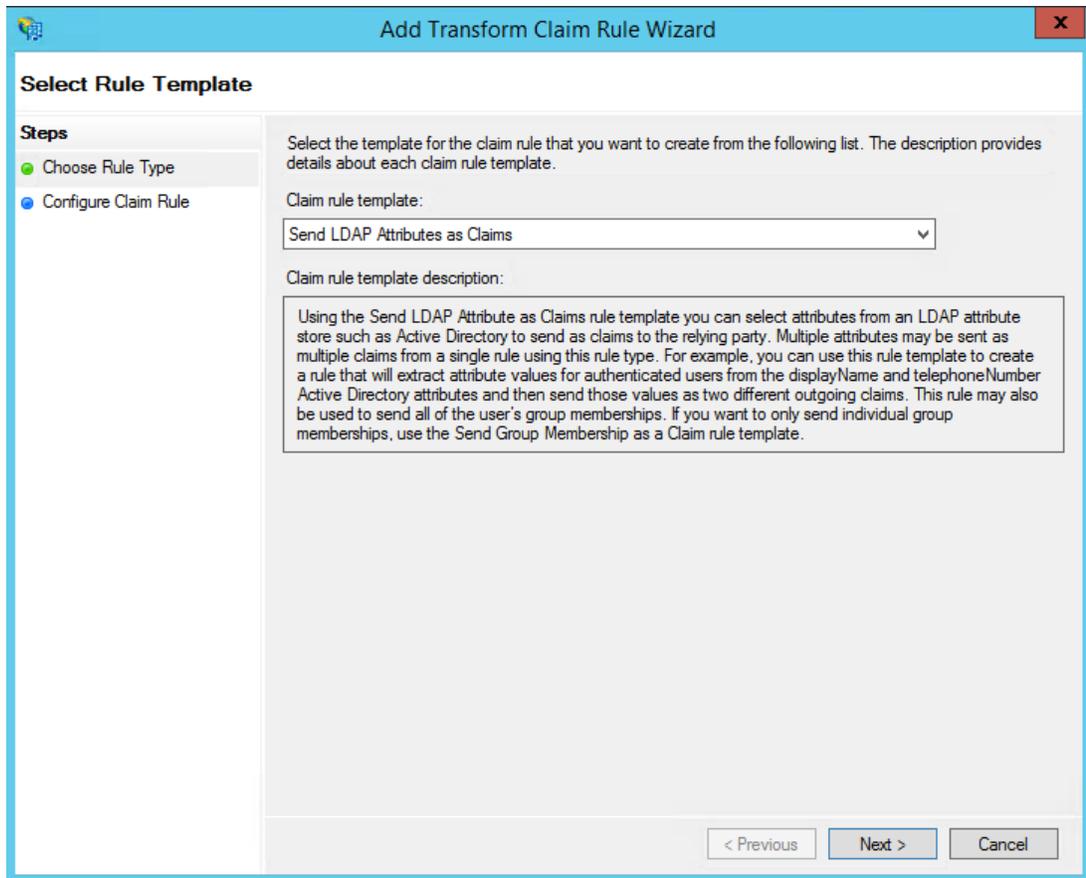


## Step 2 - Creating claim rules

Once the relying party trust has been created, you can create the claim rules and update the RPT with minor changes that aren't set by the wizard. By default the claim rule editor opens once you created the trust. If you want to map additional values beyond authentication



1. To create a new rule, click on **Add Rule**. Create a **Send LDAP Attributes as Claims** rule.



2. On the next screen, using **Active Directory** as your attribute store, do the following:
  1. In 1st row, under the **LDAP Attribute** column and **Outgoing Claim Type**, select **E-Mail Addresses** from Drop-down list.
  2. In 2nd row, select **Given-Name** from Drop-down list.
  3. In 3rd row, select **Surname** from Drop-down list.

**Add Transform Claim Rule Wizard**

---

**Configure Rule**

**Steps**

- Choose Rule Type
- Configure Claim Rule

You can configure this rule to send the values of LDAP attributes as claims. Select an attribute store from which to extract LDAP attributes. Specify how the attributes will map to the outgoing claim types that will be issued from the rule.

Claim rule name:

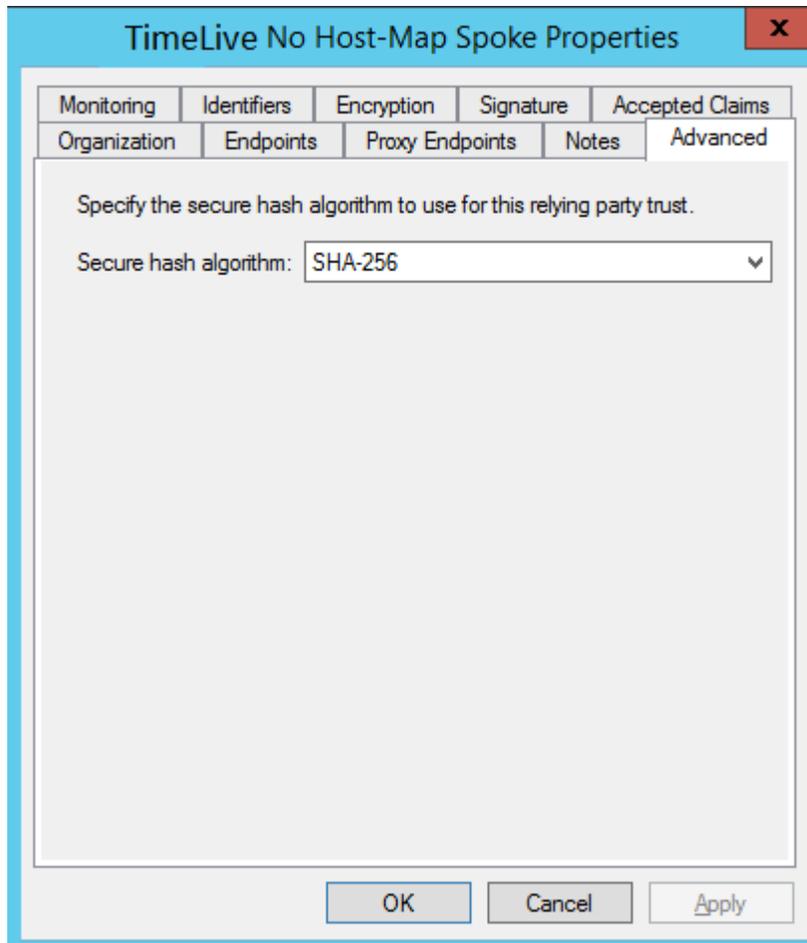
Rule template: Send LDAP Attributes as Claims

Attribute store:

Mapping of LDAP attributes to outgoing claim types:

|   | LDAP Attribute (Select or type to add more) | Outgoing Claim Type (Select or type to add more) |
|---|---|--|
| ▶ | E-Mail-Addresses                            | E-Mail Address                                   |
|   | Given-Name                                  | Given Name                                       |
|   | Surname                                     | Surname  |
| * |   |  |

4. Click on **Finish** to save the new rule. You still need to adjust a few settings on your relying party trust. To access these settings, select **Properties** from the **Actions** sidebar while you have the RPT selected. In the **Advanced** tab, switch from **SHA-1** to **SHA-256** and click **OK**.



### Step 3 - Configuring User settings with LDAP

In Active Directory, User attributes should be identical to LDAP Attributes,

1. First Name is Given-Name (Mandatory)
2. Last Name is Surname (Mandatory)
3. Email is E-mail-Address (Mandatory)

The screenshot shows a Windows-style dialog box titled "1. Properties". It has a blue title bar with a question mark and a close button. The dialog is divided into several tabs: "Member Of", "Dial-in", "Environment", "Sessions", "Remote control", "Remote Desktop Services Profile", "COM+", "General", "Address", "Account", "Profile", "Telephones", and "Organization". The "General" tab is selected. Inside the dialog, there is a user icon and the name "1.". Below this, there are several text input fields: "First name:" with "Given-Name" and "Initials:" with "1"; "Last name:" with "Surname"; "Display name:" with "Test"; "Description:" (empty); "Office:" (empty); "Telephone number:" (empty) with an "Other..." button; "E-mail:" with "Email Address"; and "Web page:" (empty) with an "Other..." button. At the bottom, there are "OK", "Cancel", "Apply", and "Help" buttons.

#### Step 4 - Configuring TimeLive

After setting up ADFS, you need to configure your TimeLive instance to authenticate using SAML. You'll use your full ADFS server URL with the SAML endpoint as the SSO URL, and the login endpoint you created as the logout URL.

After you're done, the Security page in the TimeLive admin interface (**Admin Options > Preferences > Security**) should look like this:

The screenshot shows the "Security" page in the TimeLive admin interface. The page has a blue header "Application Preference" and a navigation bar with tabs: "Organization", "General Preferences", "Invoice Setup", "Time Off Setup", "Expense Setup", "Timesheet Setup", and "Security". The "Security" tab is selected. Below the navigation bar, there is a section titled "Authentication Information". In this section, the "Enable Single sign-on (SSO)" checkbox is checked. Below it, there is a text input field for "SAML SSO URL" containing the placeholder text "{SAML SSO URL}". At the bottom right of the page, there are "Update" and "Cancel" buttons.

You need to provide SAML SSO URL Here. You should now have a working ADFS SSO implementation for your TimeLive.

# LDAP Integration with TimeLive

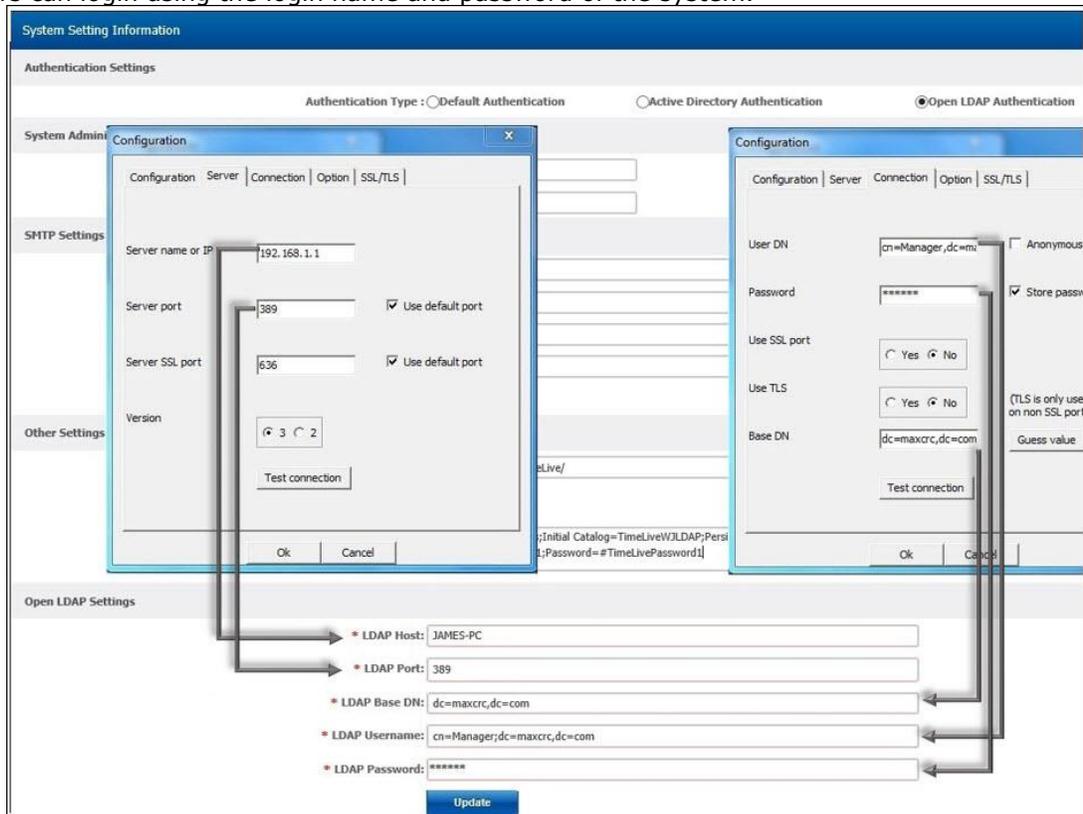
## What is LDAP how to use it:

LDAP directory service is based on a client-server model. One or more LDAP servers contain the data making up the LDAP directory tree or LDAP backend database. An LDAP client connects to an LDAP server and asks it a question. The server responds with the answer, or with a pointer to where the client can get more information (typically, another LDAP server).

No matter what LDAP server a client connects to, it sees the same view of the directory; a name presented to one LDAP server references the same entry it would at another LDAP server. This is an important feature of a global directory service, like LDAP.

## Configuring LDAP Authentication

You can configure TimeLive to authenticate the requester login with the LDAP. This provides you an advantage of not having to remember too many passwords. For this, you should configure LDAP authentication, then any password change that is made in the LDAP will also reflect in TimeLive. So the requesters can login using the login name and password of the system.



**LDAP Host** must be specified exactly the same as **Server Name or IP** used in LDAP configuration (As shown in above picture) as well as fill **LDAP Port** with same port used in LDAP configuration and **LDAP Base DN** should match with **Base DN** of LDAP configuration. After giving same LDAP username and password, Click update. LDAP Integration is now configured with TimeLive Account. LDAP users can also now login with there already assigned user names and passwords.





# Mobile Apps

## Introduction to TimeLive Mobile App.

With the advancement of technology and increase in the use of mobile phones, everyone is looking for ways they can bring the business in their hands. Many of the tasks were performed but building the timesheet for the projects was very difficult. If one is unable to complete the job in the official hours then the maintenance of the extra hours worked outside the office hours was not possible. TimeLive facilitate Timesheet mobile application to overcome this problem and to give the freedom of managing timesheet wherever an employee is.

## Time tracking using TimeLive Mobile App.

Timesheet gives the opportunity to track the time against the projects and Tasks. The updates in the records are circulated in the complete circle of the team involved in the project and notification through the e-mail is also sent. Before TimeLive, it was very difficult to coordinate with other members of the project and a rapid change was witnessed with the introduction of the application.

Now the timesheet can be updated and managed anywhere by using the mobile application.

## Download TimeLive Mobile Time Tracking For Android & iPhone

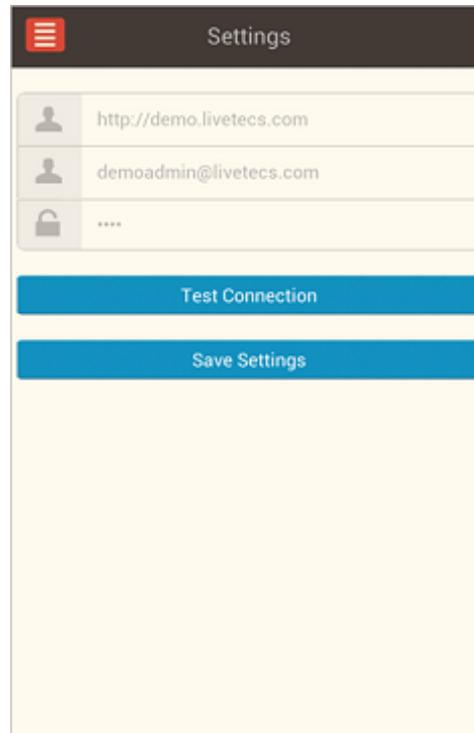
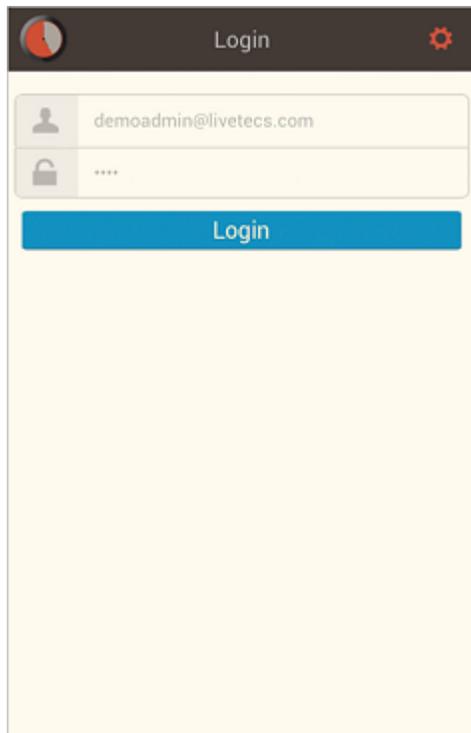
Capture your time against your clients, projects, and tasks while on the go.

1. Empower employees to work seamlessly across all devices – desktop, tablet, and smartphone.
2. Allows your field staff to enter time against jobs that have been assigned to them.
3. Timesheets are updated automatically in TimeLive web and assigned to their associated jobs.
4. Timesheet comments as easy as in the web browser.
5. Easily enter time against the selected projects, tasks and activities.
6. Enter data just once and it reflects on all devices and web timesheet.

The application requires downloading ([Android](#) / [IOS](#)), once done it is connected with the account, and any changing in the entries and records are automatically updated on the account. Then from whichever device the employee login, the updated information.

## Setup:

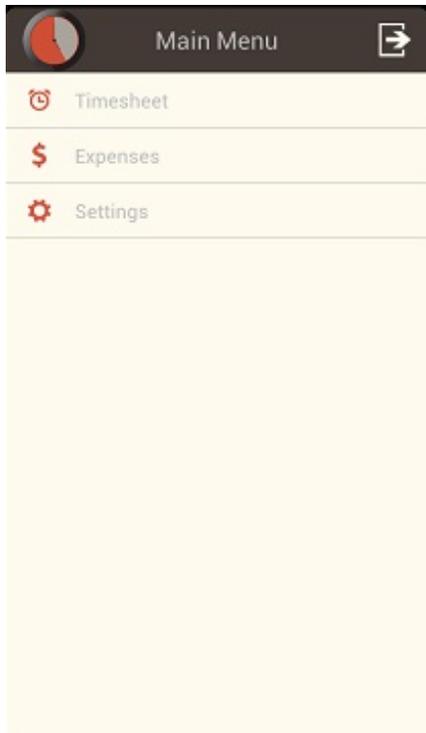
After the installation of TimeLive App on your mobile, please launch Mobile App and go to **Settings (ICON)** before attempting to login.



Under **Settings**, Change URL to **http://timelive.livetecs.com**, and change **Email ID**, masked characters with your **Login Credentials**.  
You can **Test Connection** for credentials confirmation. **Save Settings** after Test confirmation.

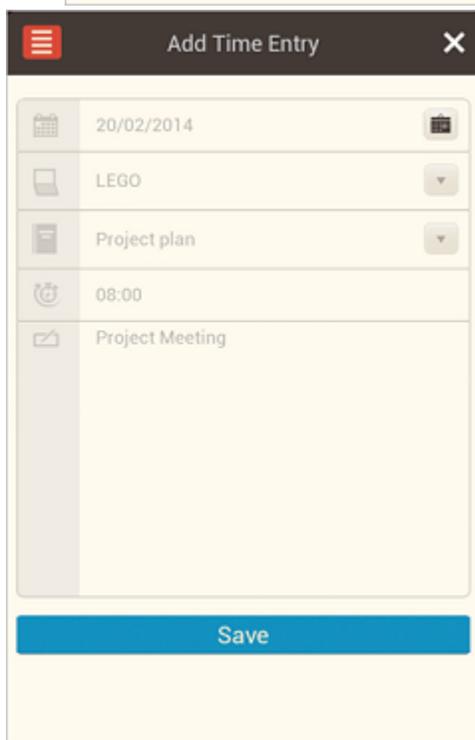
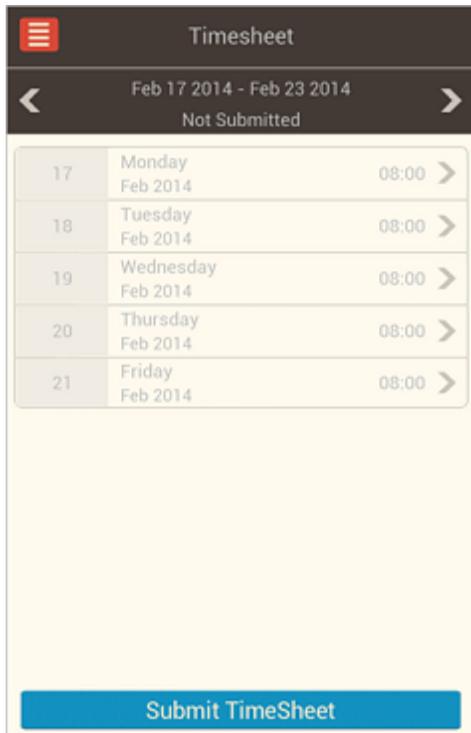
### **TimeLive Android App Entries:**

After the successful login to TimeLive App, user will be prompt with 3 options, as shown below.



## **Timesheet Entries:**

User can easily make time entries and submit Timesheets from mobile.



To make new TimeEntry, user need to click **Timesheet** from **Menu** and **click** on "+" Sign.

1. Select Date on first row
2. Select Project from 2nd row Drop-Down
3. Select Task From 3rd row Drop-Down
4. Select Time from analog screen clock

5. After filling the last description field, click "Save" button

## Expense Entries:

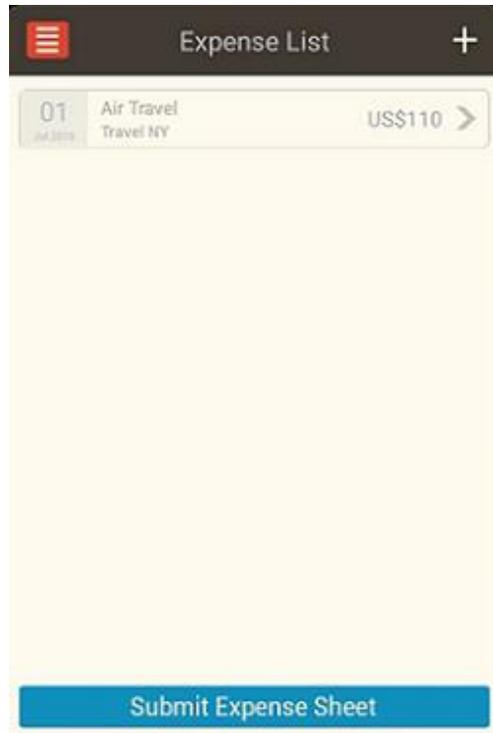
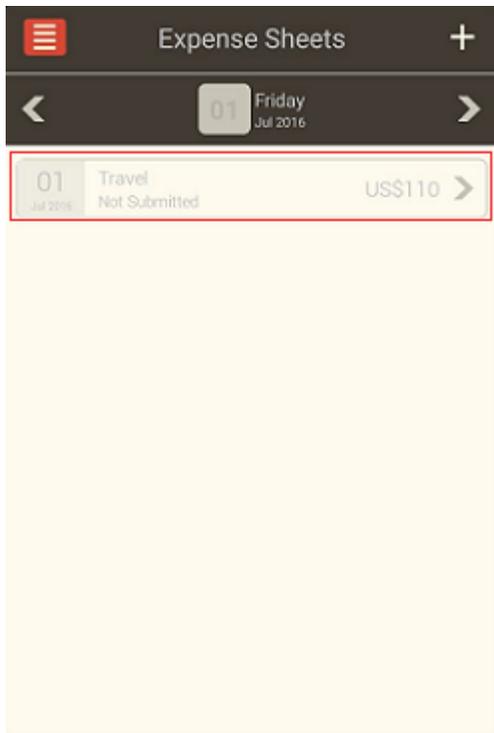
User can easily input & submit Expense entry from their mobiles.

The image displays two screenshots from a mobile application. The left screenshot shows the 'Expense Sheets' screen, which includes a date selector for '01 Friday Jul 2016'. The right screenshot shows the 'Expense Entry Form' with the following fields: Project (LEGO), Expense Type (Air Travel), Description (Travel NY to FL), Date (1/7/2016), Reimburse (checkbox), Billable (checkbox), Mode of Payment (Visa), Currency (US\$), and Amount (100). A 'Save' button is located at the bottom of the form.

To make new Expense Entry, user need to click **Expenses** from **Menu** and **click** on "**+**".

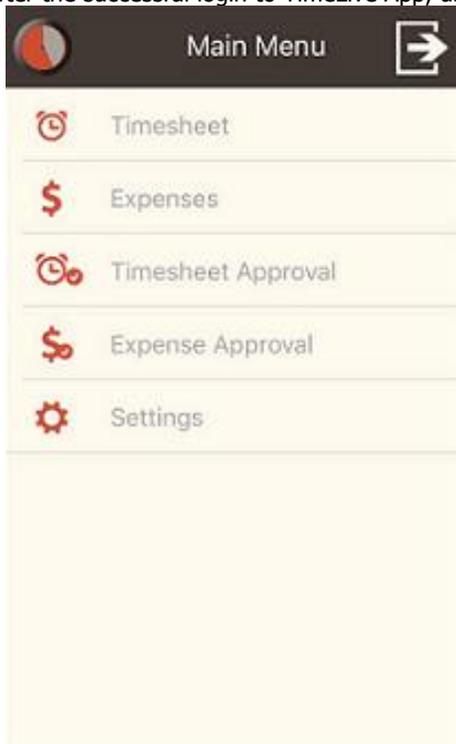
1. Select Project from first Drop-Down
2. Select Expense Type from 2nd Drop-Down
3. Fill the Expense Description
4. Select the Expense Date
5. Select the option of Reimburse and Billable
6. Select Mode of Payment from Drop-Down
7. Select Currency in which payment was made
8. Input Amount spent in the next row
9. Extra charges/taxes will be calculated automatically according to expense se parameters
10. After filling the last field, click "Save" Button

To **submit** saved **Expense Entry**, user need to **click** on **Expense sheet** and **click Submit Expense Sheet**.

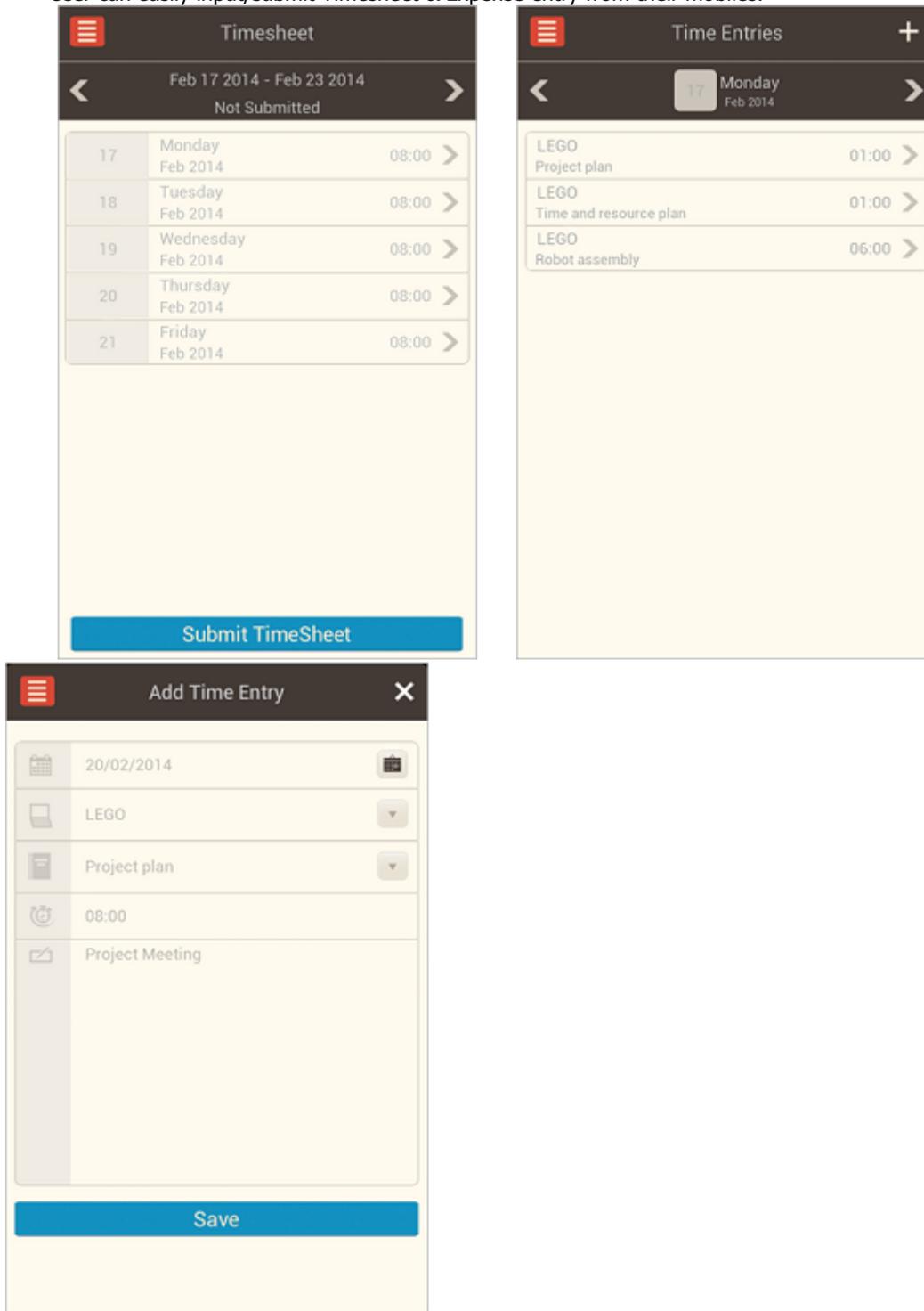


## Timesheet Entries:

After the successful login to TimeLive App, user will be prompt with 5 options, as shown below.



User can easily input/submit Timesheet & Expense entry from their mobiles.



To make new TimeEntry user need to click on "+" Sign under Timesheet.

1. Select Date on first row
2. Select Project from 2nd row Drop-Down
3. Select Task From 3rd row Drop-Down

4. Select Time from analog screen clock
5. After filling the last description field, click "Save" button

## Expense Entries:

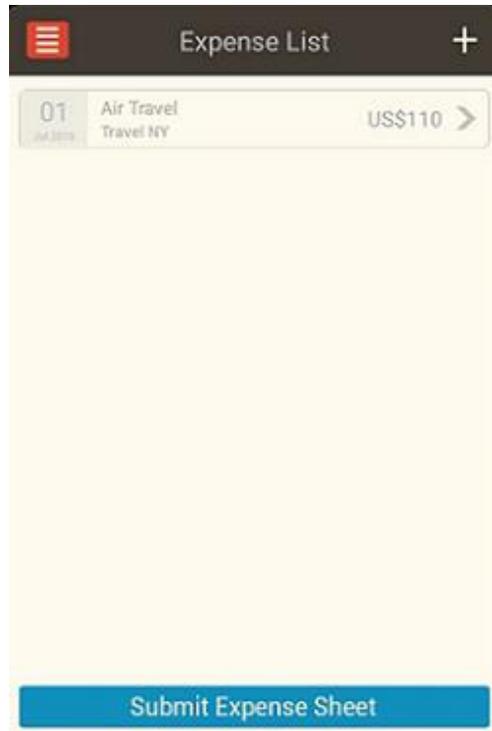
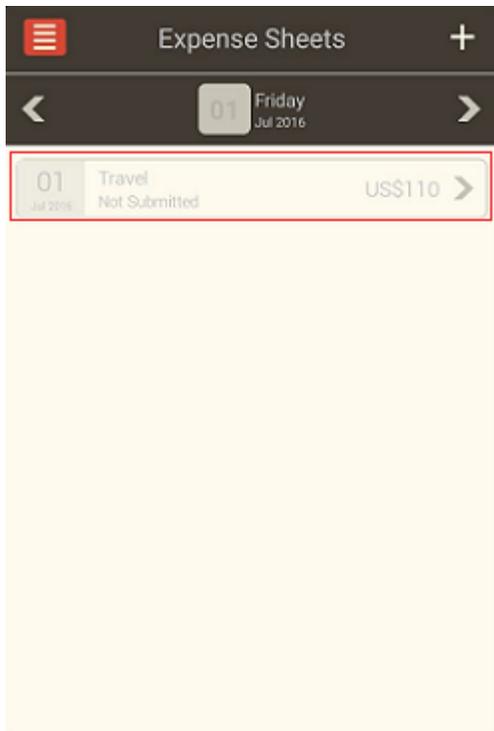
User can easily input & submit Expense entry from their mobiles.

The image displays two screenshots from a mobile application. The left screenshot shows the 'Expense Sheets' screen, which includes a menu icon, a title bar with 'Expense Sheets' and a plus sign, and a date selector showing '01 Friday Jul 2016'. The right screenshot shows the 'Expense Entry Form' screen, which includes a menu icon, a title bar with 'Expense Entry Form' and a close icon, and several input fields: Project (LEGO), Expense Type (Air Travel), Description (Travel NY to FL), Date (1/7/2016), Reimburse and Billable checkboxes, Mode of Payment (Visa), Currency (US\$), and Amount (100). A 'Save' button is located at the bottom of the form.

To make new Expense Entry, user need to click **Expenses** from **Menu** and **click** on "**+**".

1. Select Project from first Drop-Down
2. Select Expense Type from 2nd Drop-Down
3. Fill the Expense Description
4. Select the Expense Date
5. Select the option of Reimburse and Billable
6. Select Mode of Payment from Drop-Down
7. Select Currency in which payment was made
8. Input Amount spent in the next row
9. Extra charges/taxes will be calculated automatically according to expense se parameters
10. After filling the last field, click "Save" Button

To **submit** saved **Expense Entry**, user need to **click** on **Expense sheet** and **click Submit Expense Sheet**.



## Timesheet & Expense Approval:

User can Approve / Reject Timesheet / Expense of his subordinates from mobile.

To do that user needs to click Timesheet / Expense Approval from Main Menu, and click on Approve / Reject after check box selection.

Approver can select multiple Timesheets / Expense at a time for Approval / Rejection.





# F.A.Q.

## Disabling Pop-Up Blockers

To ensure full functionality of the application, you should disable pop-up blockers for the TimeLive website. To allow pop-ups for TimeLive website:

- Microsoft Internet Explorer:
  - a. Select Tools > Pop-up Blocker > Pop-up Blocker Settings.
  - b. Enter the TimeLive URL in the field provided.
  - c. Select the Add button, and then the Close button, and then the OK button.
- Mozilla Firefox:
  - a. Select Tools > Options.
  - b. Select the Content icon.
  - c. Select the Exceptions button next to the Block pop-up windows check box.
  - d. Enter the TimeLive URL in the field provided.
  - e. Select the Allow button, and then the Close button, and then the OK button
- Other pop-up blocking application

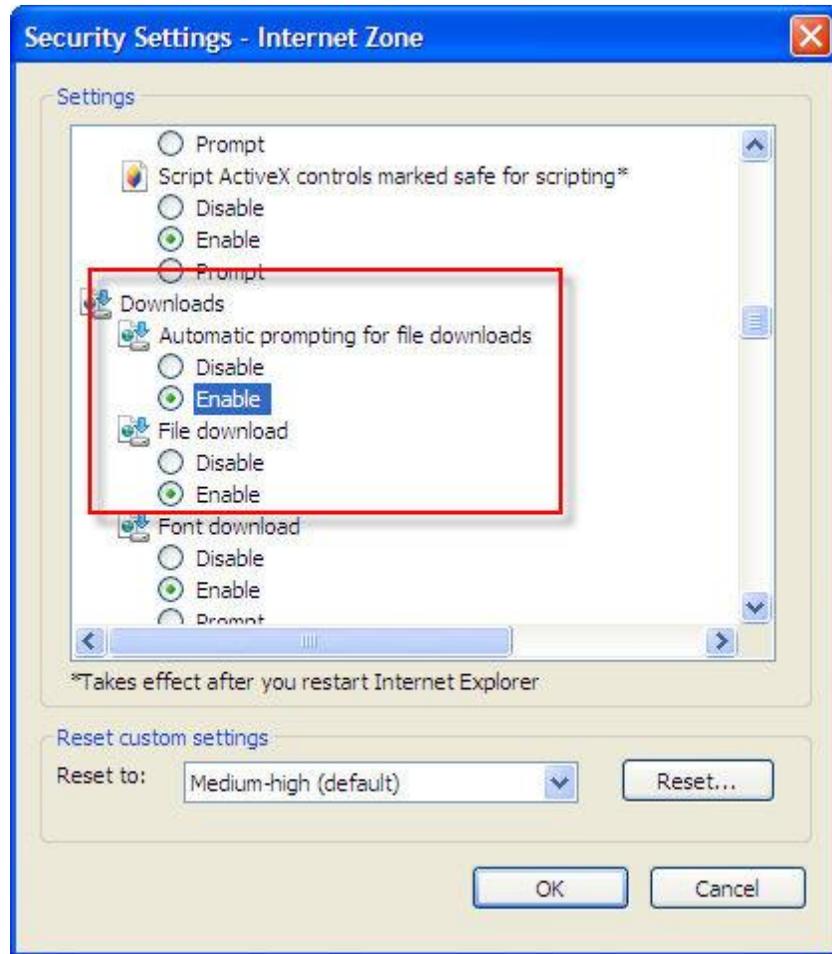
Refer to that application's documentation for information on how to disable pop-up blocking for a specific site.

## Settings required on Internet Explorer 7

Because of recent security changes in Internet Explorer 7, these settings are required for exporting reports in IE7.

## Instructions required to be done in IE7:

- From the [Tools] menu - top right on IE7 - select [Internet Options].
- Select the [Security] Tab.
- Select the [Internet Zone] (click the globe on the left).
- Hit [Custom Level] button (bottom of dialogue box)
- Scroll down to the [Downloads] section and find the [Automatic prompting -for file downloads] setting and set it to [Enable], then click on [OK].



## Frequently Logout Issue By Users

**SYMPTOMS:** TimeLive user's can experience frequently logout.

**CAUSE:** There are many possible causes for this problem. This article addresses one possible cause: session data that is lost because of antivirus software activity.

This problem can occur when antivirus software scans the Web application files. During the scanning process, the antivirus software may mark the Global.asax, the Web.config, and/or the Machine.config files as modified. This modification prompts the Microsoft .NET Framework restart the Web application. If the session data is stored in-process, all session data is lost whenever a Web application is restarted.

### **RESOLUTION:**

To resolve this problem, use following method:

- Configure your antivirus software so that it does not scan .asax and .config files.  
<http://kbalertz.com/316148/Session-Variables-Intermittently-Applications.aspx>