

Printed Documentation

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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>

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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, contact us through Live Chat or e-mail us on 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:

Operating System	Web Server
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,

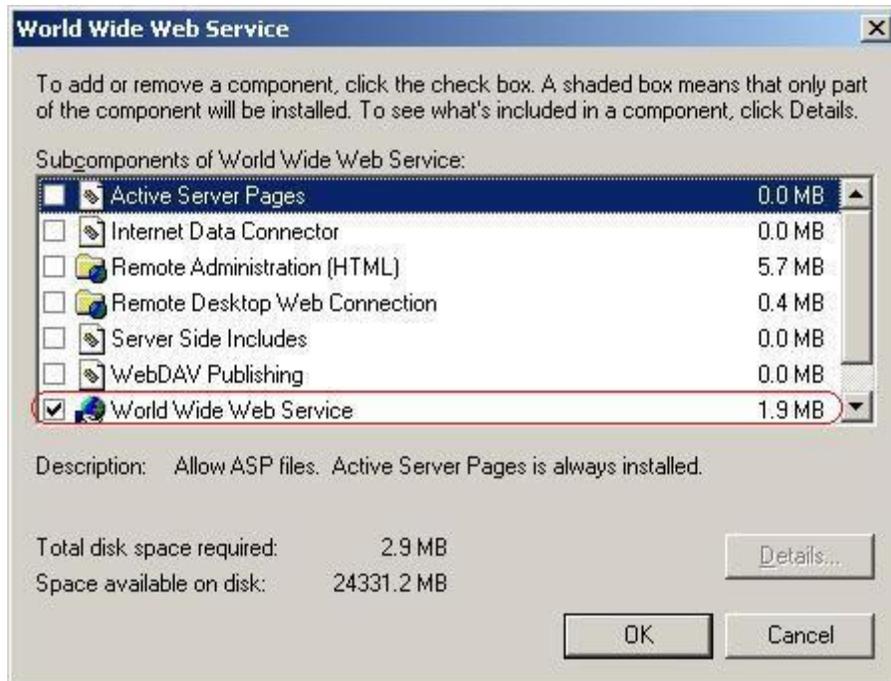
- Microsoft Edge
- Google Chrome (Version 31.0)
- Safari (Version 7.1)
- Microsoft Internet Explorer (Version 7.0)
- Mozilla Firefox (Version 33.0)

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.

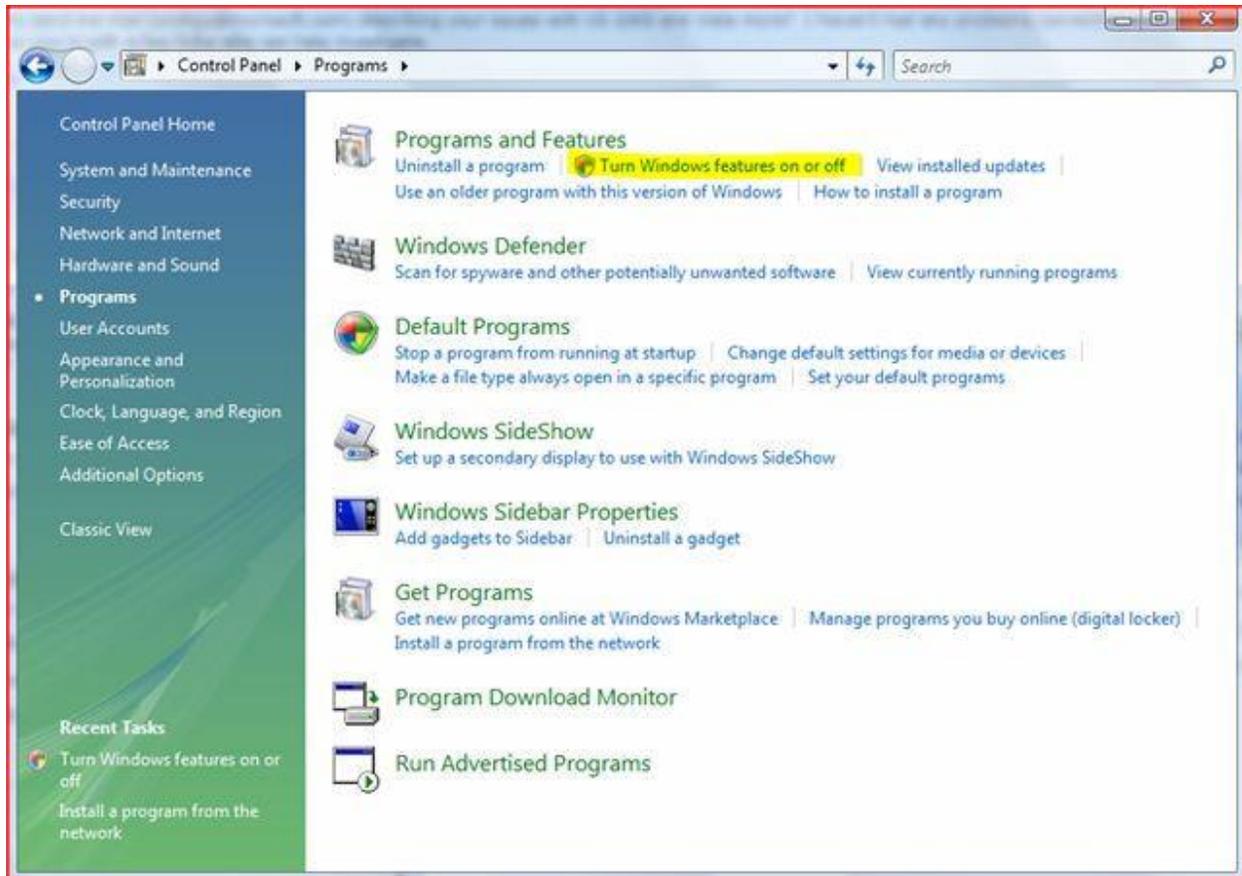


4. Click **OK** to start **IIS** installation.

Installing Web Server (IIS) on Windows Vista:

Installing IIS on Windows Vista:

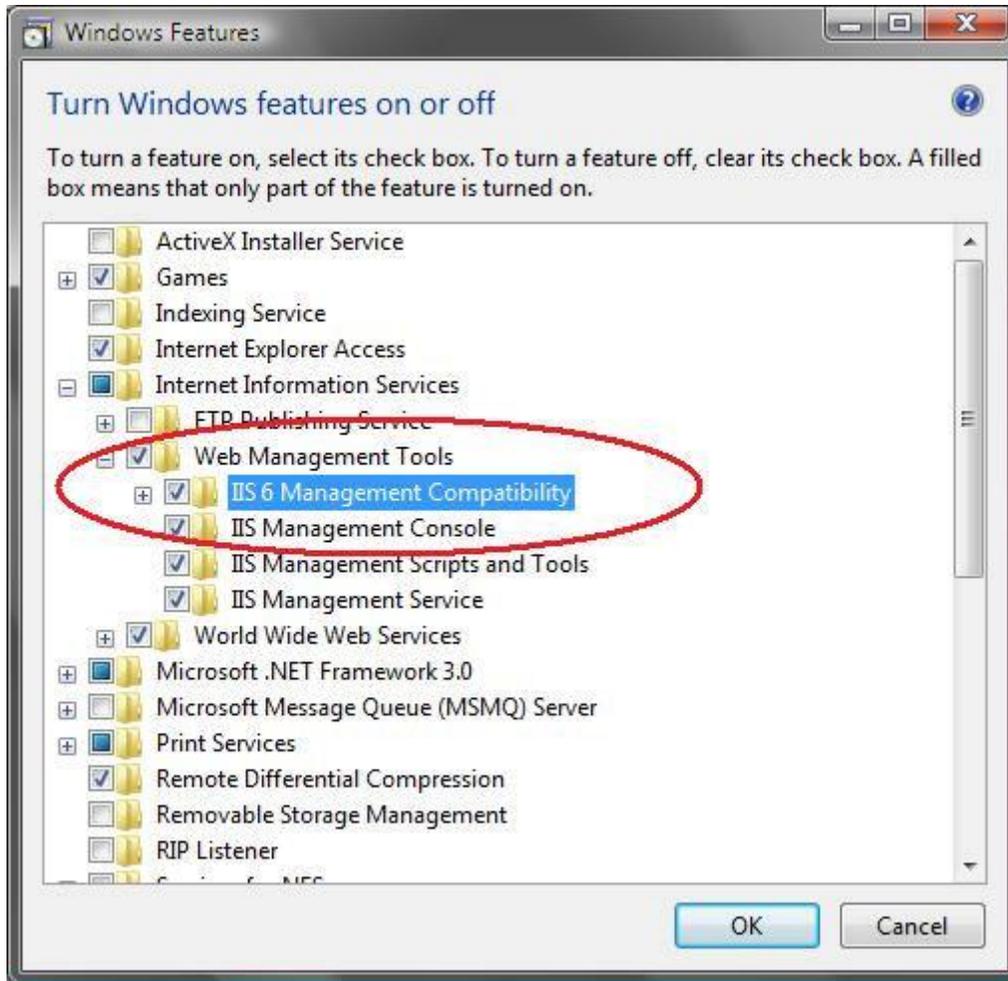
1. In Windows Vista, open **Control Panel** and then click **Programs and Features**.
2. In the right pane, click **Turn Windows features on or off**.



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.

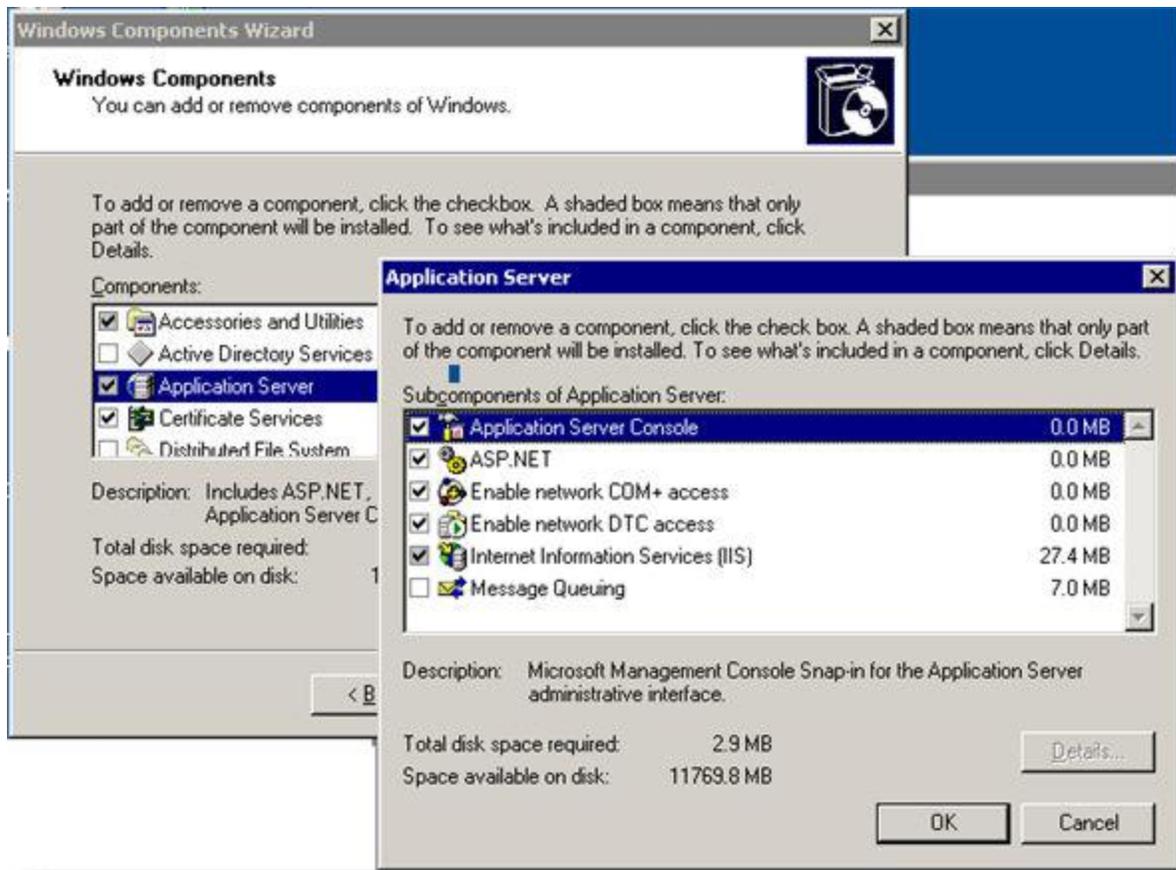
7. Click OK to start the **ASP.NET** installation process.



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

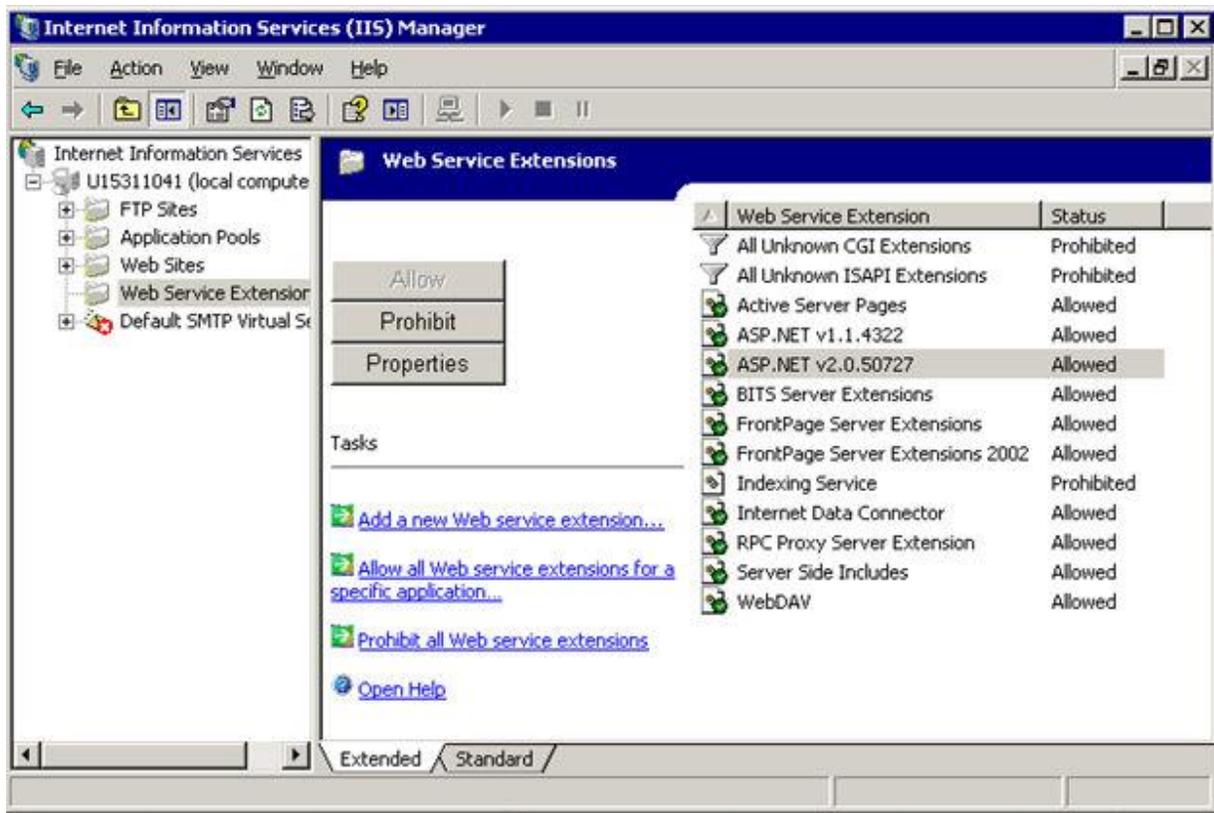
Installing IIS on Windows Server 2003:

- 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.

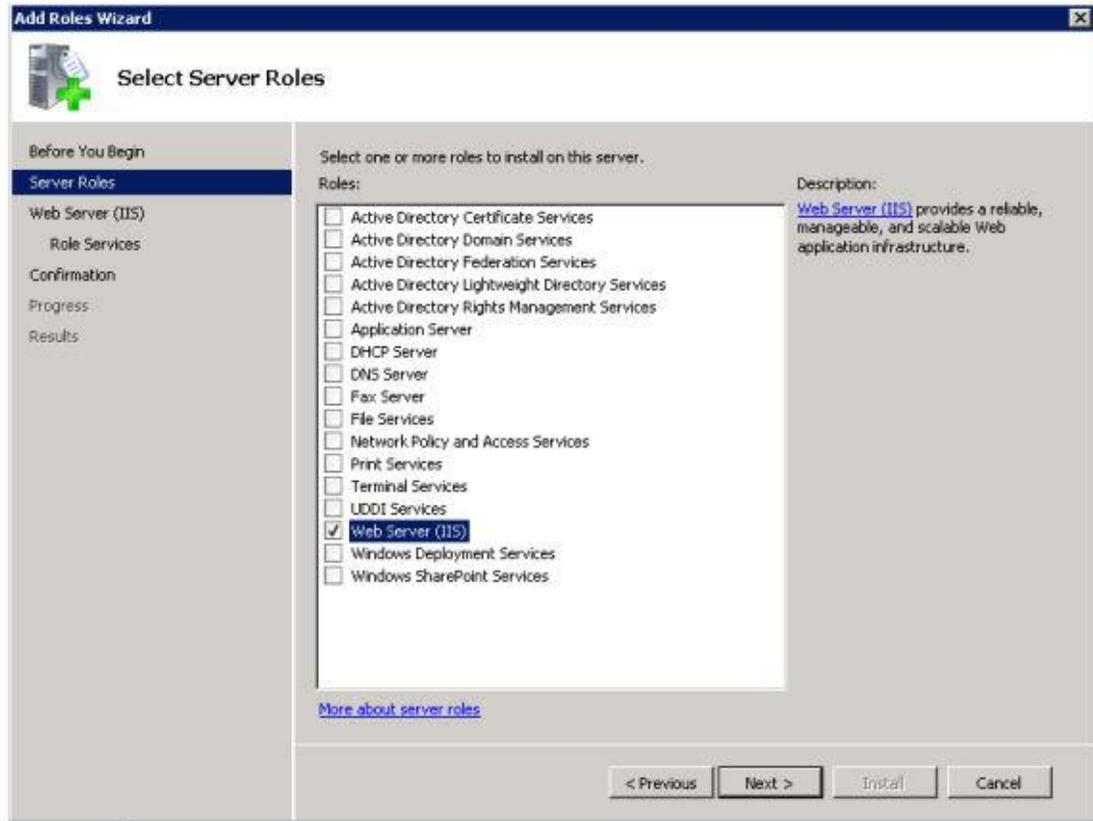
Server Manager provides a single dashboard to install or uninstall Server Roles and Features. It also gives an overview of all currently installed Roles and Features. When IIS 7.0 is chosen from the Server Manager, the basic components and services needed for IIS are automatically selected.

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.

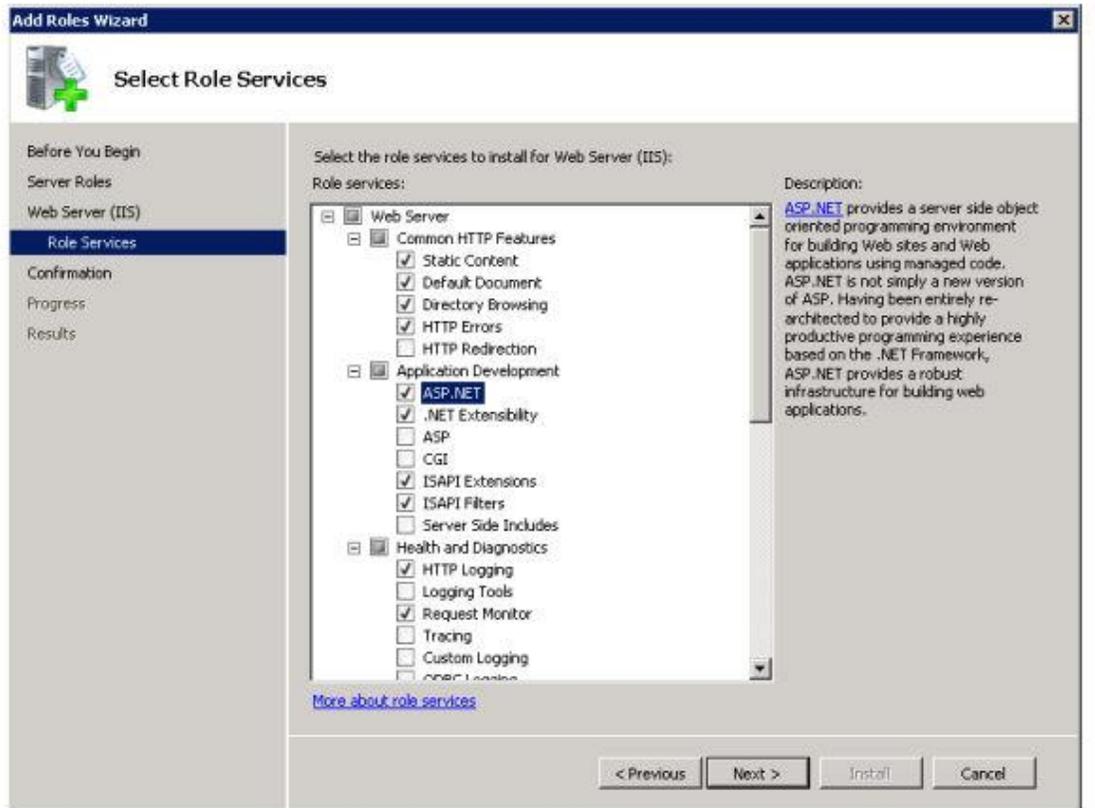
You can install IIS via Server Manager found in:

- 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:



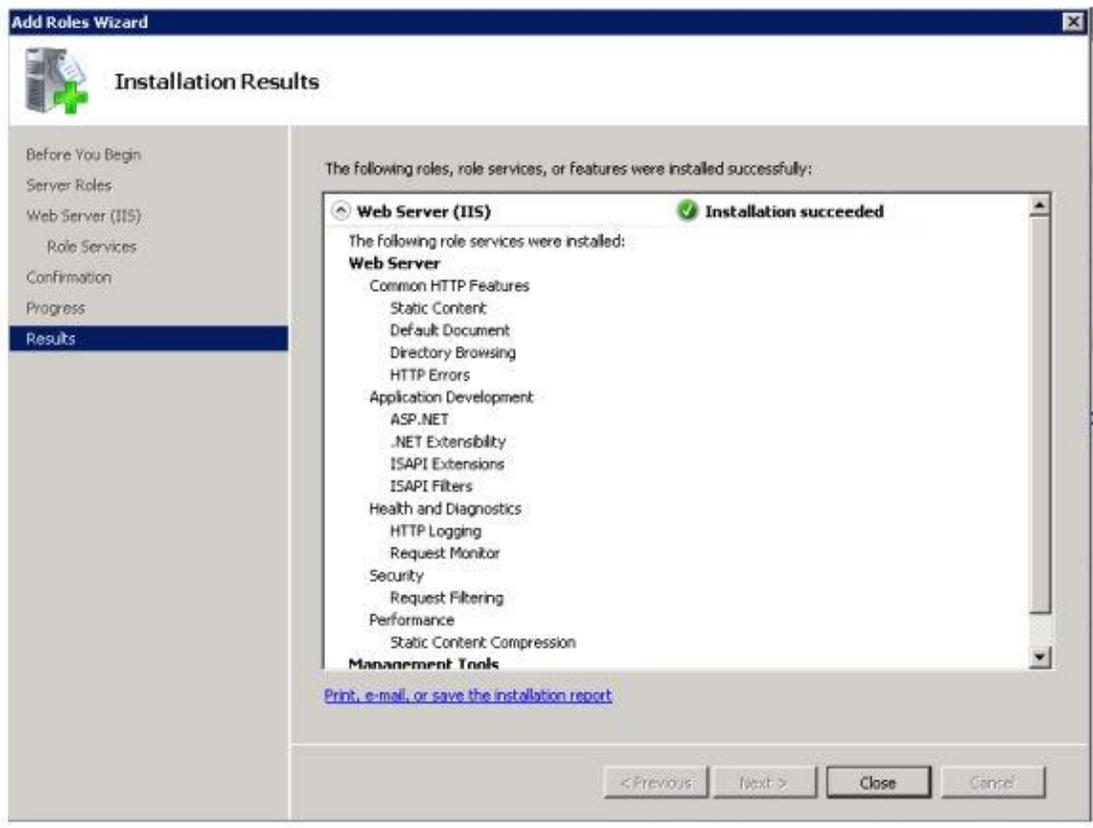
- Choose the IIS Services to be installed. In this case ASP.NET is to be installed. Select the services required by your applications:



- 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:



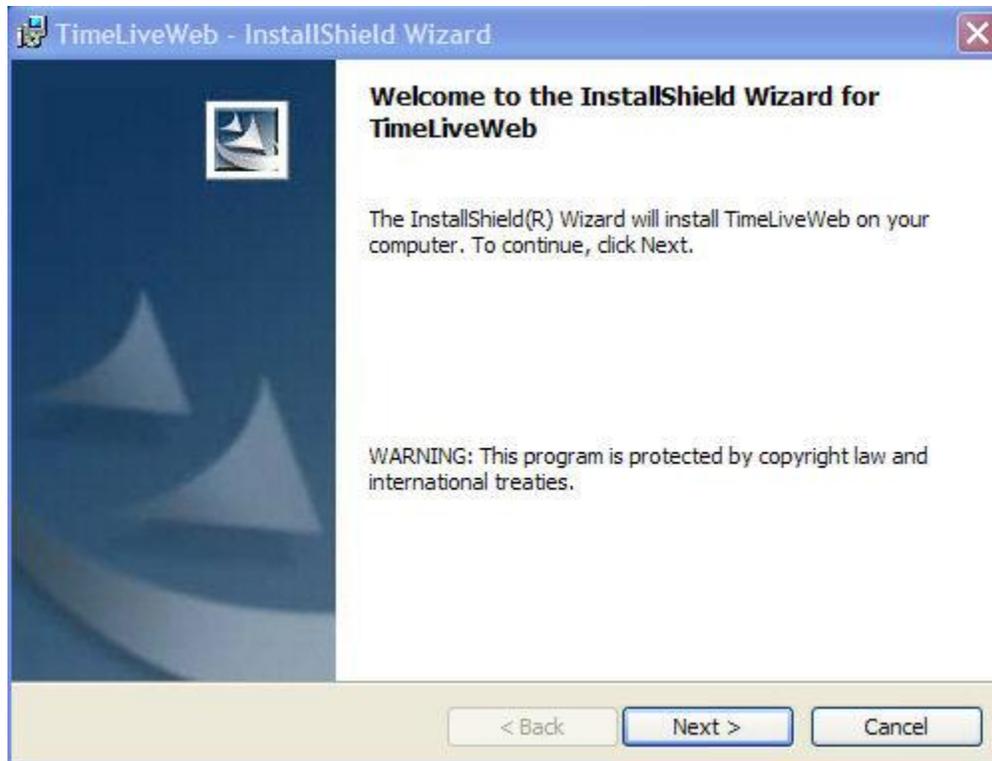
- IIS 7.0 is now installed with a default configuration for hosting ASP.NET on your Windows Server 2008:



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:

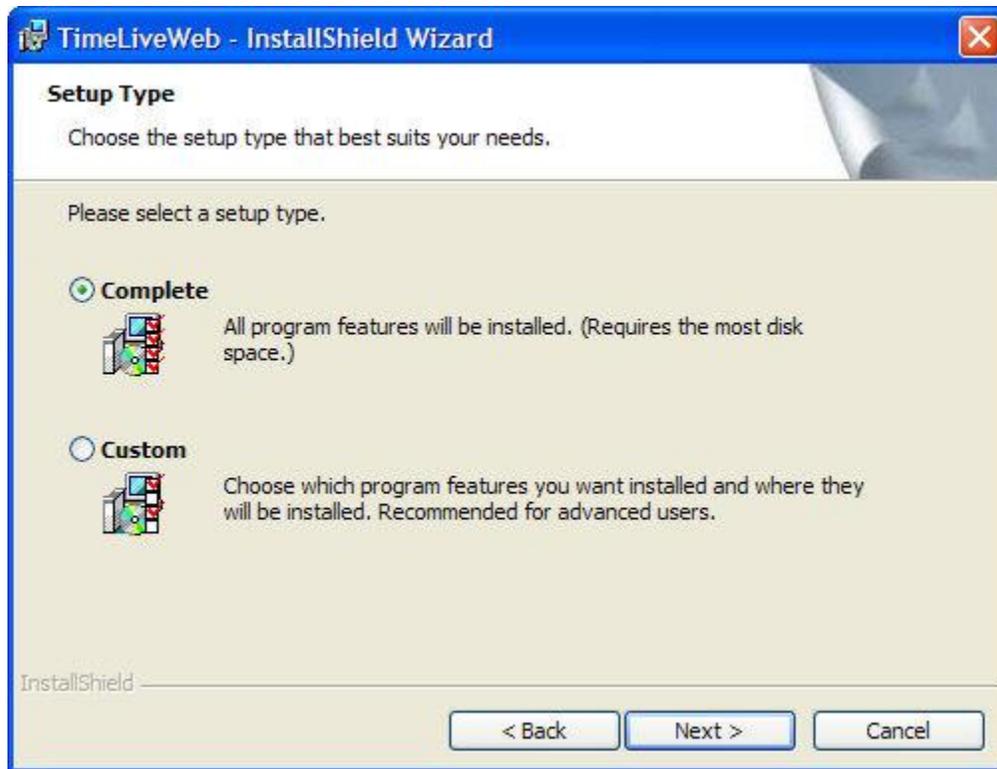
Anyone who uses this computer (all users)

Only for me

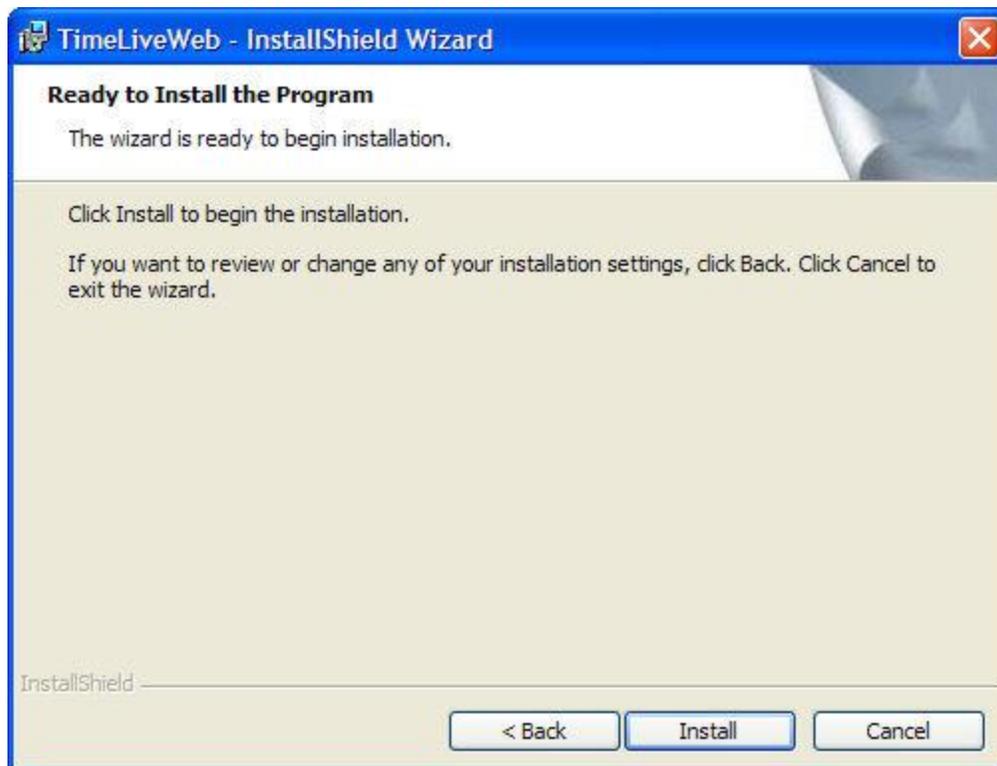
InstallShield

< 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.



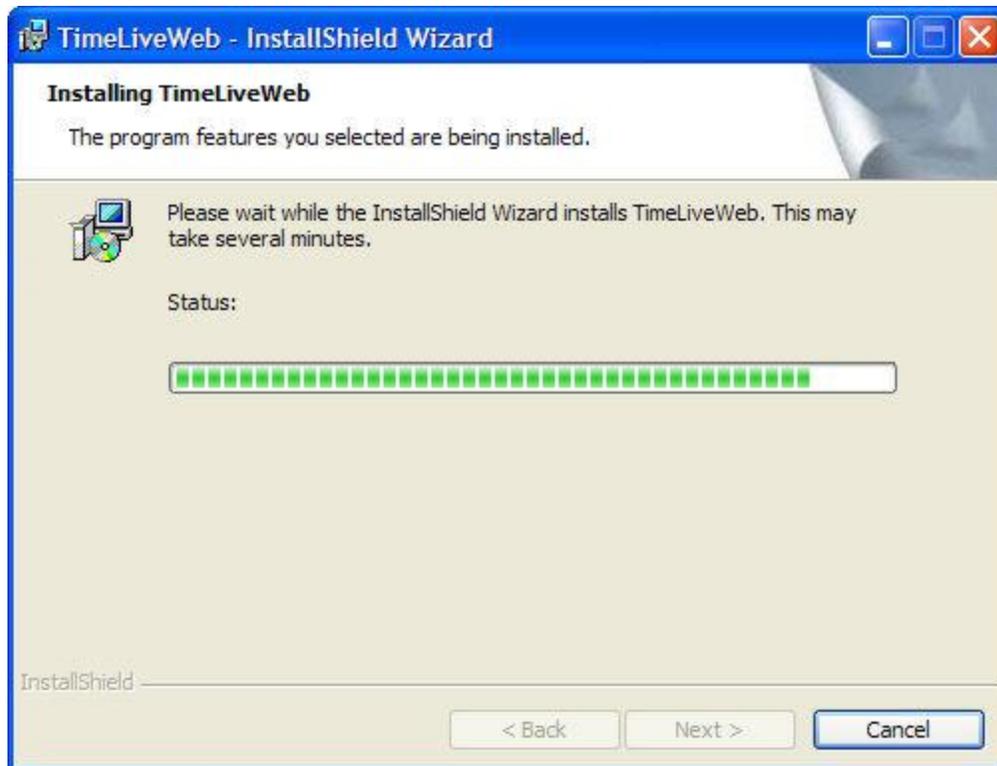
7. Now click on **[Next]** button to start TimeLive installation



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.

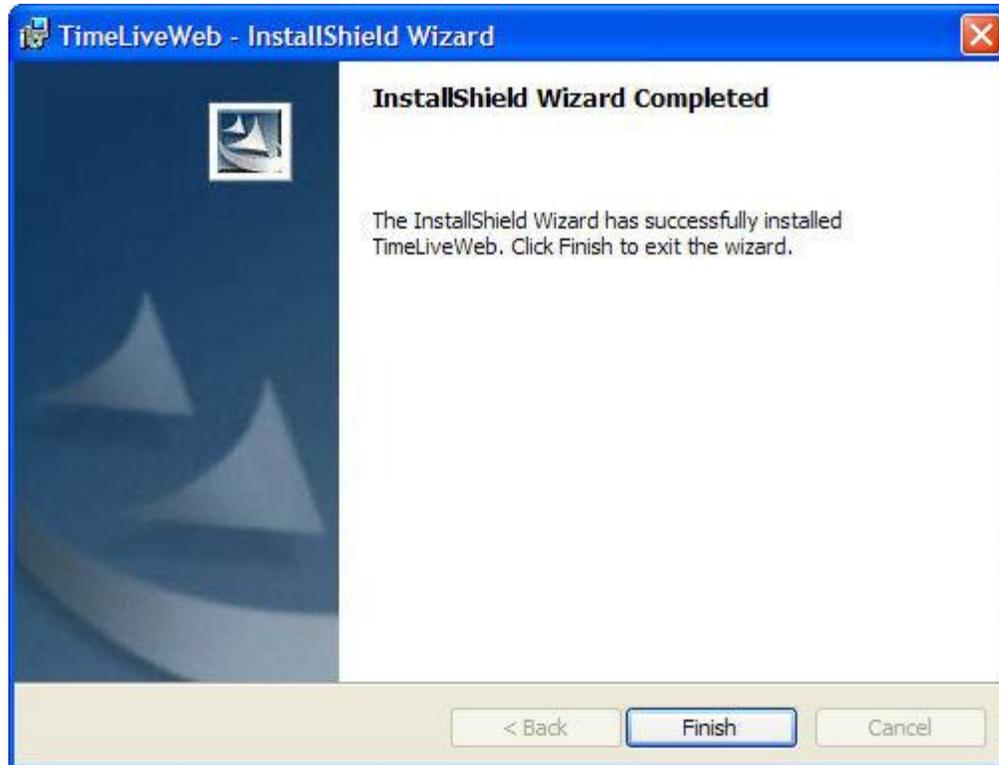


TimeLive requires that Microsoft Data Access Components (MDAC) be installed on your machine. At this point, the installation program will check for the presence of MDAC and

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
Cassini WebServer	http://server_name:15395/ or http://IP_address:15395/
IIS	http://server_name/TimeLive or http://IP_address/TimeLive
ASP (Hosted version)	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.

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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:

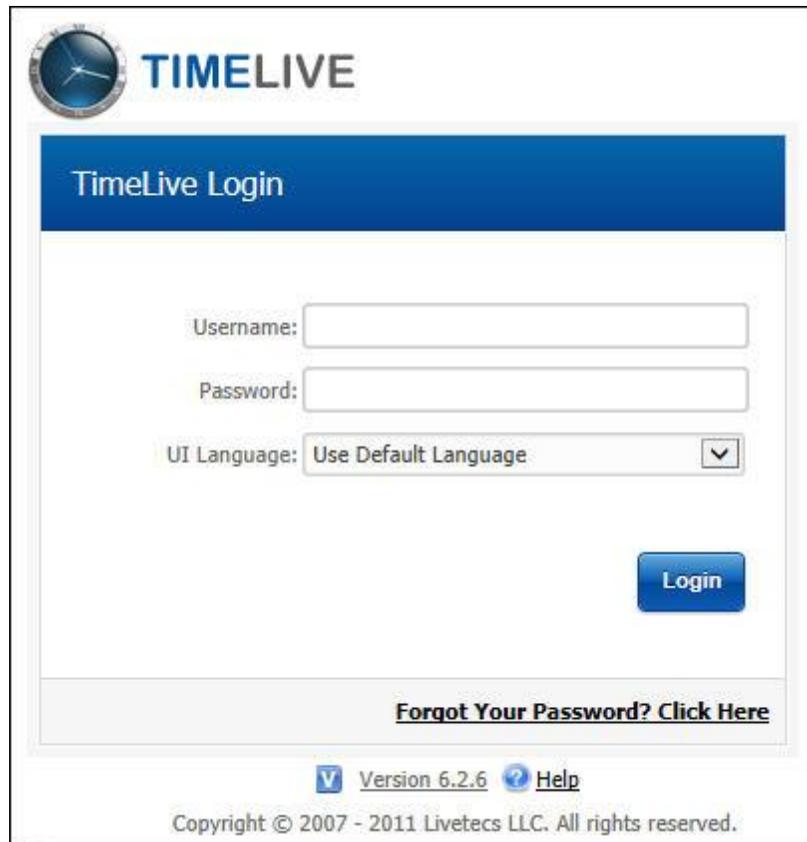
Sign Up

First time login in TimeLive:

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

Steps of login:

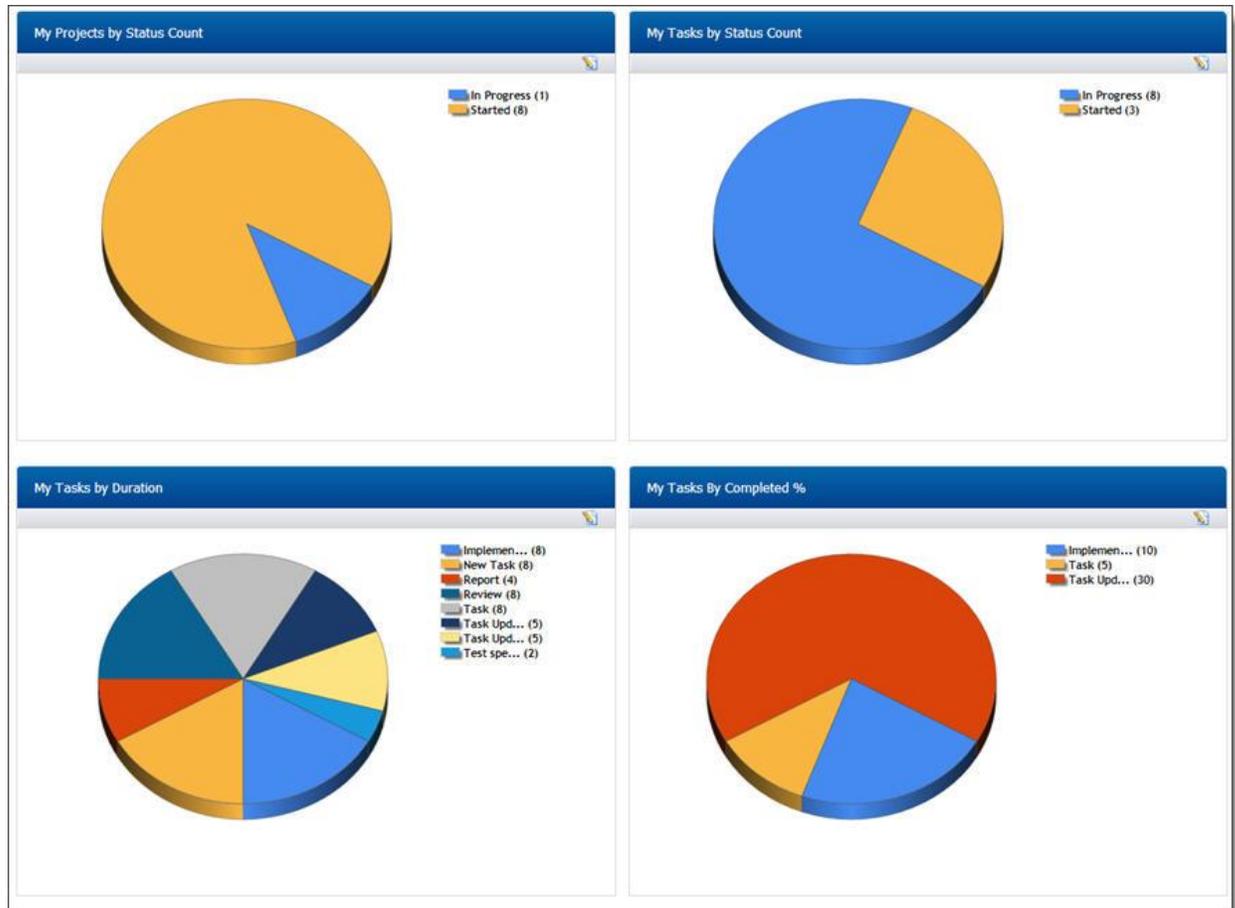
1. Enter your **Login Email address**
2. Enter your **password**
3. Select UI (User Interface) Language according to your preference
4. Click on **Login** button to login in the TimeLive Application



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 text "TIME LIVE" next to it. Below the logo is a blue header bar with the text "TimeLive Login". The main content area 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 set to "Use Default Language". A blue "Login" button is positioned to the right of the input fields. Below the input fields is a link that says "Forgot Your Password? Click Here". At the bottom of the page, there is a version indicator "Version 6.2.6" with a small 'v' icon, a "Help" link with a question mark icon, and a copyright notice: "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)

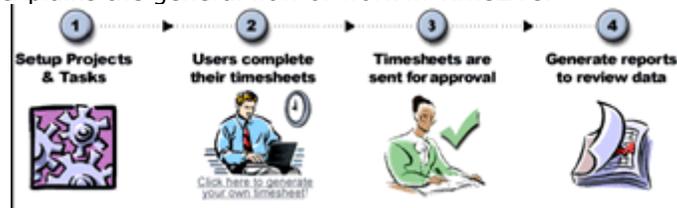
If you have problems accessing Web TimeSheet from outside your network, contact your system administrator.

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.



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@dbsqualitymgmt.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:

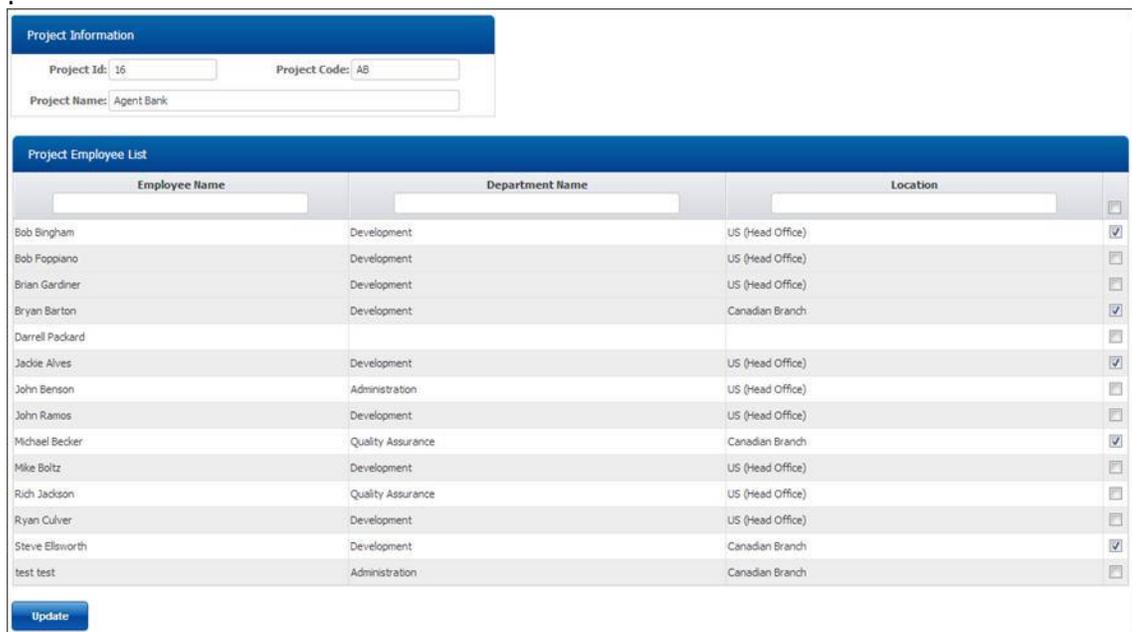
1. In **[Project List]**, click on **[Delete]** link of record which you want to delete.
2. Click on **"Yes"** on delete confirmation dialog

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



The screenshot displays a web interface for managing project employees. 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 "35", "Project Code:" with the value "A8", and "Project Name:" with the value "Agent Bank".

Project Employee List: This section features a table with three columns: "Employee Name", "Department Name", and "Location". Each row represents an employee and includes a checkbox in the rightmost column for selection. The "Update" button is located at the bottom left of the table.

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

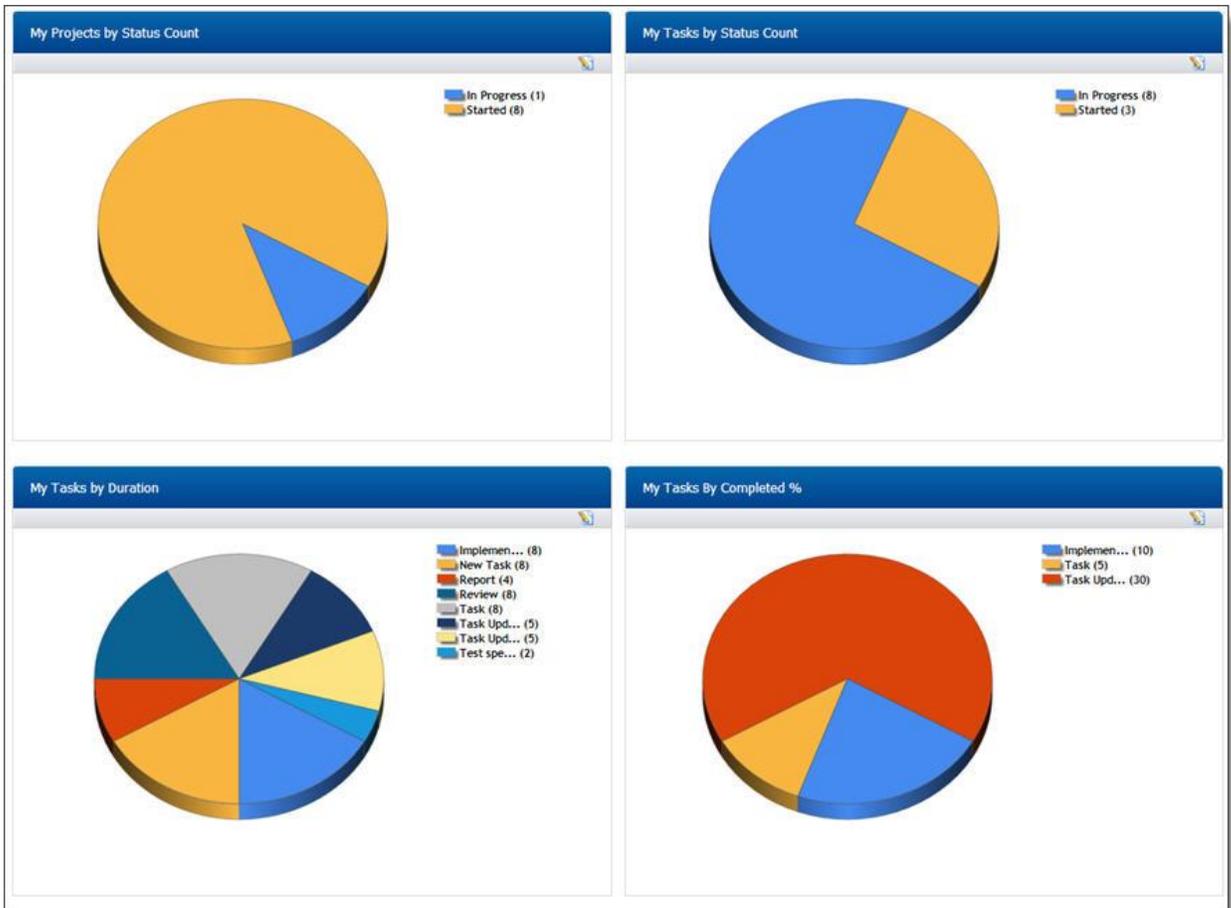
Task Estimates

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, there is an 'Audit Trail' button and a 'Project Task Information' header. Below this is a 'Project Task' section with a 'Task Team' button. 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 of the form, there are 'Update' and 'Cancel' buttons, and 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

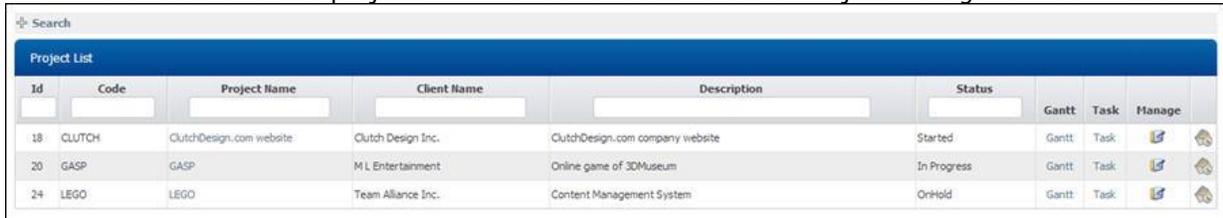
Add Cancel

My Projects

About [My Projects]

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

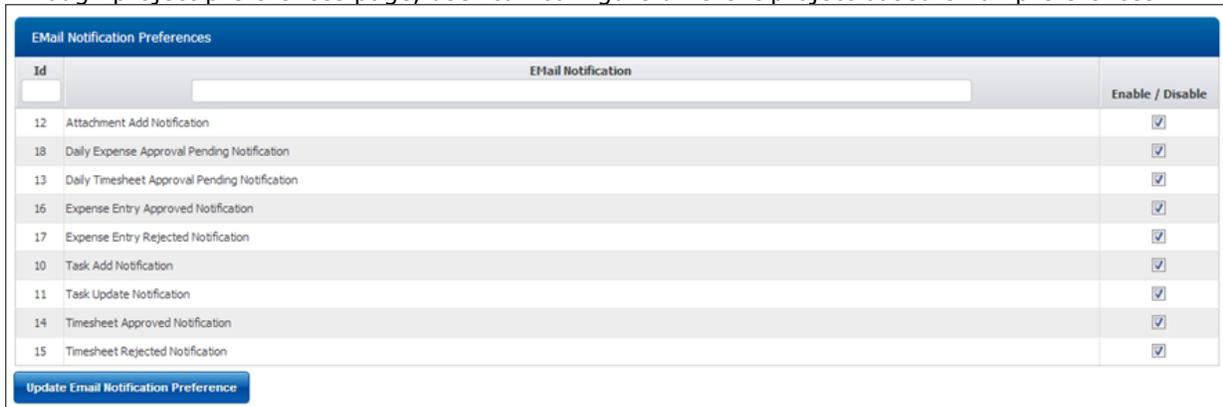
- [My Projects] page will show only those projects in which he is assigned using [Project Team] option in Project.
- User can change his own **email preferences** by clicking on [Preferences] icon.
- User can open [Tasks] page by clicking on task link. Tasks link will only be available available for 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		
Time Off	Holiday			
Time Off	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 5/27	Tue 5/28	Wed 5/29	Thu 5/30	Fri 5/31
LEGO	Implementng Epidemic round 2	Standard	08:00				
Select Project	Select Task	Standard					
Select Project	Select Task	Standard					
Time Off	Holiday						
Time Off	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' interface. At the top, there are navigation buttons: 'Weekly Timesheet', 'Timesheet Periods', 'Audit', 'Save', and 'Start Timer'. Below these, the user information is shown: 'Employees: 001 - John Benson', 'Current Date: 5/30/2013', and 'Time Entry Date: 5/30/2013'. The 'Timesheet Status' is 'Not Submitted'.

The main section is a table for entering time entries:

Project	Project Task	StartTime	EndTime	TotalTime	Description
LEGO	Implementing Epidemic Rounting round 1	08:00	22:00	14:00	
Select Project	Select Task				
Time Off	Holiday				
Time Off	Holiday				
				14:00	

Below the table, there 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: Id, In/Out, Time, 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 5/27	Tue 5/28	Wed 5/29	Thu 5/30	Fri 5/31
LEGO	Robot assembly	12:12 ■				
Select Project	Select Task					
Select Project	Select Task					
Time Off	Holiday					
Time Off	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 5/27	Tue 5/28	Wed 5/29	Thu 5/30	Fri 5/31
<input type="text" value="LEGO"/>	<input type="text" value="Robot assembly"/>	05:00 08:00 03:00 ■				
<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), '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 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.

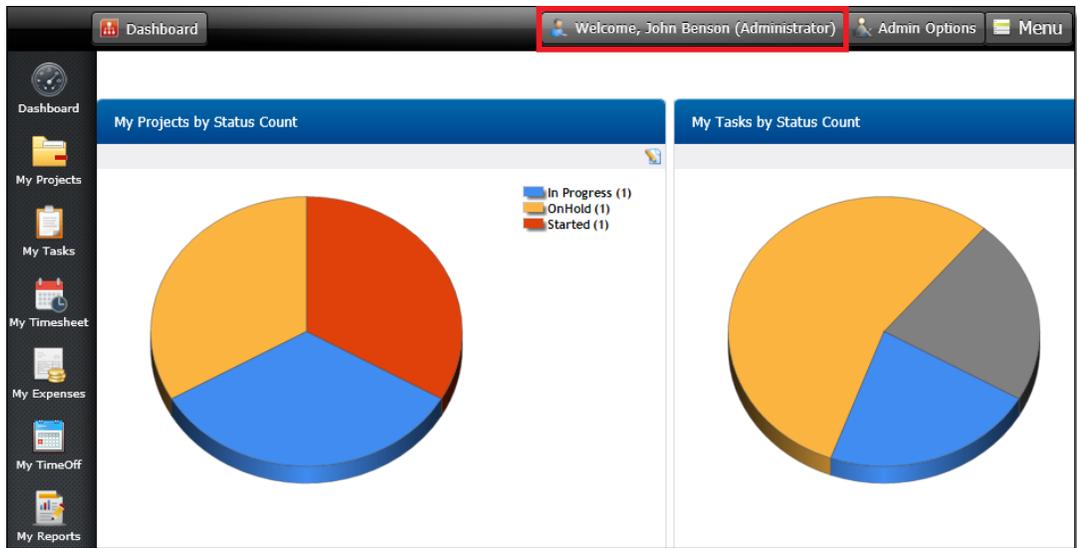
More About Attendance Module:

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.

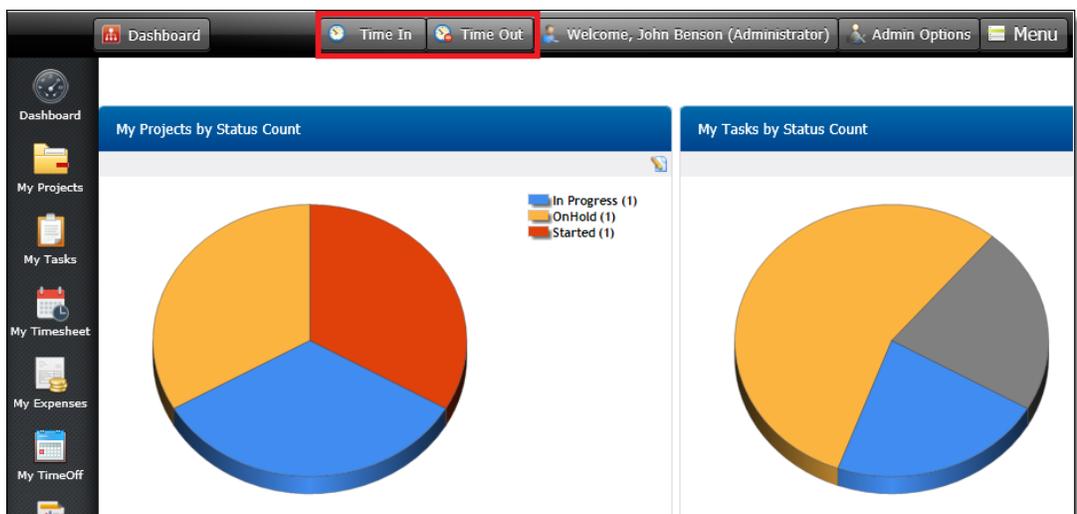
- > **Login** to your **TimeLive Account**.
- > Click on your **Profile**.



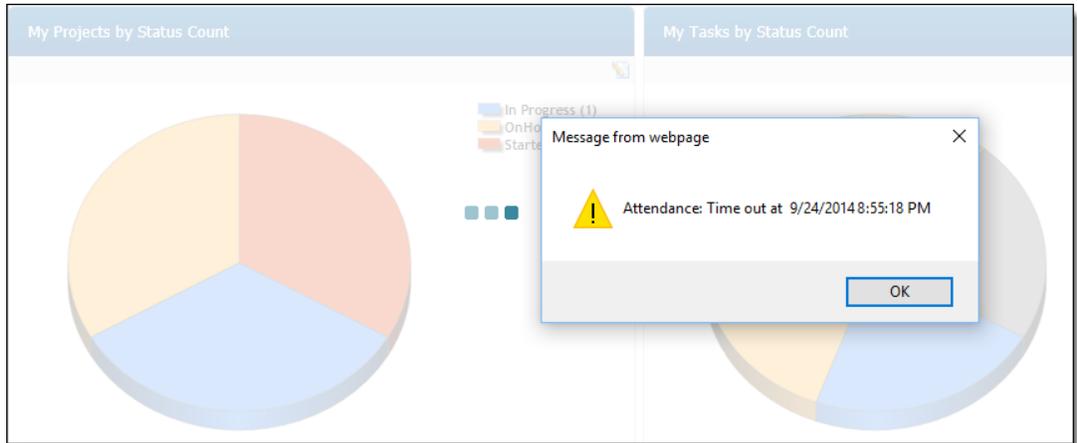
> **Enable** check "**Enable Time In/Out Option**" and click **Update**.

The form is titled 'Enable Time In/Out Option'. It features a dropdown menu for 'Time Zone' set to '(-7.00) Mountain Time (US & Canada)'. Below this, the checkbox 'Enable Time In/Out Option' is checked. There are three input fields: '*Current Password:', '*Password:', and '*Verify Password:'. At the bottom right, there are two buttons: 'Update' and '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="button" value="v"/>	Select Task <input type="button" value="v"/>		
Select Project <input type="button" value="v"/>	Select Task <input type="button" value="v"/>		
Time Off	Holiday <input type="button" value="v"/>		
Time Off	Holiday <input type="button" value="v"/>		
		00:00	

Copy From:

Status Legend
 Not Submitted
 Submitted
 Approved
 Rejected

Employee Attendance List

Id	In/Out	Time	Absent		

- 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 Timsheet:

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 31/10	Tue 01/11	Wed 02/11	Thu 03/11	Fri 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 10 rows of data. Below the table is a form titled 'Expense Type Information' with fields for 'Expense Type', 'Tax Code' (set to '<None>'), 'Show Quantity' (checkbox), and 'Quantity Caption'. An 'Add' button is at the bottom of the form.

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		

Expense Type Information

Expense Type

*Expense Type:

Tax Code: <None>

Show Quantity:

*Quantity Caption:

Add

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 (a dropdown menu), 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:

The screenshot displays the 'Tax Code' management interface. At the top, there is a 'Tax Zone' dropdown menu set to 'Default'. Below this is a table with the following columns: 'Id', 'Tax Code', 'Formula', 'Edit', and 'Delete'. The table contains six rows of data:

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

Below the table is a 'Tax Code Information' form. It includes two input fields: '*Tax Code:' and '*Formula:'. An 'Add' button is located at the bottom of the form.

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

Expense Sheet Status: Not Submitted

Reimbursement Currency: US\$

Expense sheet Description

Date

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

Add/Edit form for Expense

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	🔗
6/22/2013	LEGO	Car Mileage	Rent a car for meeting with client.	Cash	Miles/Kilometer 200	1.5	0.00	0.00	0.00	US\$300.00	🔗
							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 lists several types: Holiday (Request Required: No), Other (Request Required: Yes), Personal Leave (Request Required: Yes), Sick Leave (Request Required: No), Training (Request Required: Yes), and Vacation (Request Required: Yes). Below the table is a "Time Off Types Information" form with a "Time Off Types" input field, a "Time Off Request Required" checkbox, and an "Add" button.

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

Time Off Types Information

Time Off Types:

Time Off Request Required:

Add

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: 001

* First Name: John Middle Name:

* Last Name: Benson Address Line 1:

Address Line 2: State:

City: Zipcode:

Country: Canada Home Phone No:

Work Phone No: Mobile Phone No:

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

Login / Employee Information

* Login Email Address: demoadmin@ivetec.com

* Password: * Verify Password:

Job Title: * Department: Administration

* Role: Administrator Employee Manager: <None>

* Location: US (Head Office) Employee Status: Employed

Employee Type: Full-time Hourly Working Day Type: Standard

Employee Time Off Policy: Standard Time Off Approval Type: Administrator

Holiday Type: None User Interface Language: English (United States)

Hired Date: 7/14/2009 Termination Date:

Disabled: Force Password Change:

Billing Rate

Work Type: Standard Billing Type: Hourly

Employee Rate Currency: US\$ Employee Rate: 65.0000

Billing Rate Currency: US\$ Billing Rate: 95.0000 [Billing Rate History](#)

Billing Rate Start Date: 4/13/2010 Billing Rate End Date: 4/13/2011

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:

- Project Id: 96
- Project Code: RDS
- Project Name: Refined Space Customer Service

Project Employee List:

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

At the bottom left of the 'Project Employee List' section, there 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 checked="" type="checkbox"/>	Clutch Design Inc.	1	11/14/2009		US\$ 535.00	<input type="checkbox"/> Edit Delete Print
<input checked="" type="checkbox"/>	Bahria Society of Professional Communication	2	10/30/2012	Testing	US\$ 177,956.98	<input type="checkbox"/> 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. At the top, there is 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 caCORE 3.1	Invoice No: Invoice Date: 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 (Expense Type)	Description	Invoice Detail	Amount	Billed	Edit
84	John Benson	Template	Food Food		Invoice No: 2 Invoice Date: 10/30/2012 PO Number:	US\$ 10,342.50	<input checked="" type="checkbox"/>	Edit
85	John Benson	Template	Air Travel Air Travel		Invoice No: 2 Invoice Date: 10/30/2012 PO Number:	US\$ 15,210.00	<input checked="" type="checkbox"/>	Edit
86	John Benson	Template	Hotel Stay Hotel		Invoice No: 2 Invoice Date: 10/30/2012 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	Gantt	Tasks	Team	Milestones	Attachment	...	<input type="checkbox"/>							
15	CAC	caCORE 3.1	Barth Gross Electric ..	11/17/2012	Started	Gantt	Tasks	Team	Milestones	Attachment	...	<input type="checkbox"/>							
18	CLUTCH	ClutchDesign.com website	Clutch Design Inc.	11/19/2012	Started	Gantt	Tasks	Team	Milestones	Attachment	...	<input type="checkbox"/>							
22	DMAC	DMAC Reservation System	The PSP Group	11/19/2012	Started	Gantt	Tasks	Team	Milestones	Attachment	...	<input type="checkbox"/>							
20	GASP	GASP	M L Entertainment	11/19/2012	In Progress	Gantt	Tasks	Team	Milestones	Attachment	...	<input type="checkbox"/>							
24	LEGO	LEGO	Team Alliance Inc.	11/19/2012	OnHold	Gantt	Tasks	Team	Milestones	Attachment	...	<input type="checkbox"/>							
21	OASIS V2+	OASIS V2+	The PSP Group	11/19/2012	Started	Gantt	Tasks	Team	Milestones	Attachment	...	<input type="checkbox"/>							
17	OPM	OPMcreator	Crestwood Technology ..	11/19/2012	Completed	Gantt	Tasks	Team	Milestones	Attachment	...	<input type="checkbox"/>							
23	REFINDE	Refined Space Customer Service	Refined Space	11/19/2012	Started	Gantt	Tasks	Team	Milestones	Attachment	...	<input type="checkbox"/>							
19	SHIBV2	Shibboleth V2	Barth Gross Electric ..	11/19/2012	Started	Gantt	Tasks	Team	Milestones	Attachment	...	<input type="checkbox"/>							

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

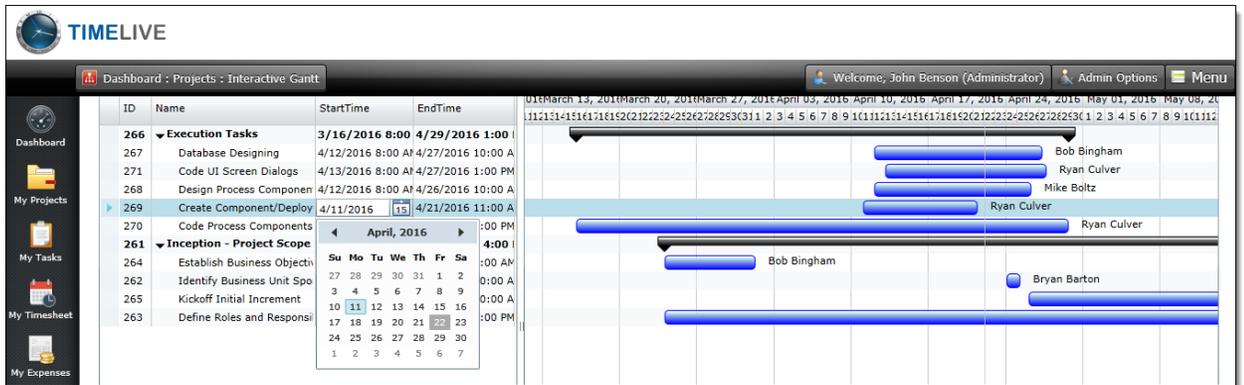
ID	Name	StartTime	EndTime	Duration
266	Execution Tasks	3/22/2016	5/31/2016	565
267	Database Designing	4/20/2016 8:	5/20/2016 1:	178
271	Code UI Screen Dialogs	3/22/2016 8:	3/30/2016 1:	53
268	Design Process Components	4/12/2016 8:	4/28/2016 1:	98
269	Create Component/Deploym	4/1/2016 8:0	4/21/2016 1:	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, 2013December 31, 2013

Ryan Culver Bob Bingham Mike Boltz Bryan Barton

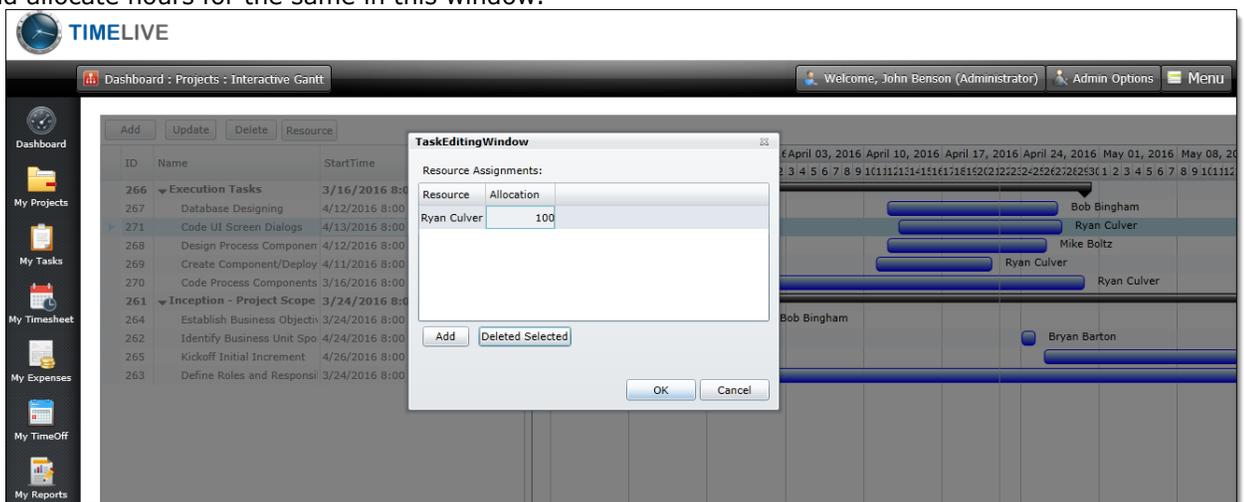
Changing Task Start / End Date:

Click on Start/End Date in the required Task and change it to required date.



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

- 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](#)
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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 with the text "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 section titled "Location Information" with a form. The form has a label "Location:" followed by a text input field and 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:

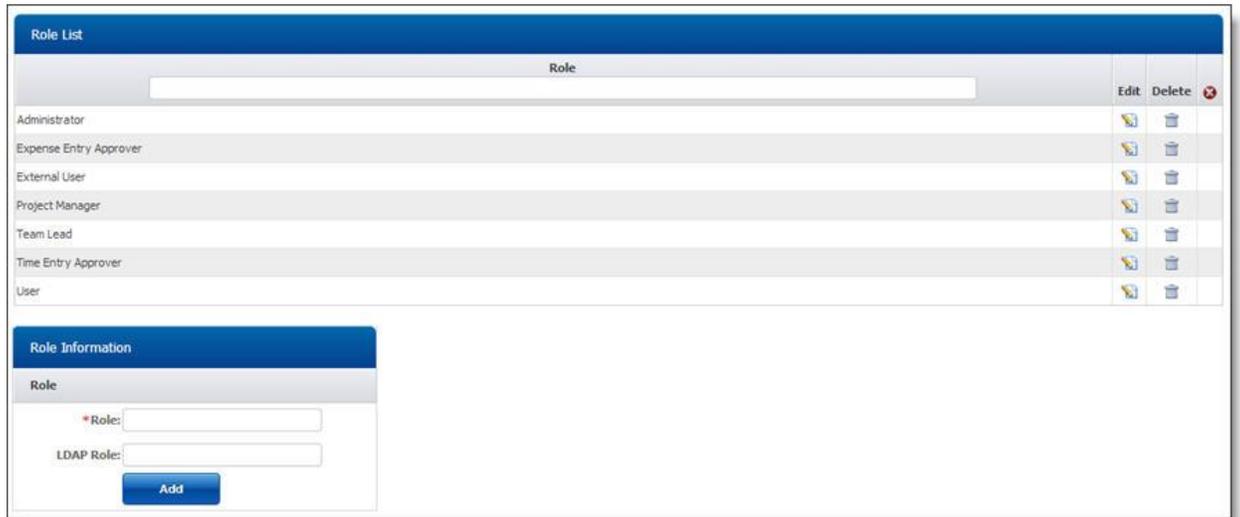
1. In **[Department List]**, click on **[Edit]** link of record which you want to modify.
2. Update your required modification in **[Department Information]** form.
3. Click on **[Update]** button to update this record.

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			
Id	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			
Id	Priority	Edit	Delete
172	Urgent		
173	High		
174	Medium		
175	Low		

Priority Information

Priority

*Priority:

*Priority Order:

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]

Id	Absence Description	Edit	Delete
140	Sick Leave	✎	🗑️
141	Holiday	✎	🗑️
142	Vacation	✎	🗑️

Absence Type Information

Absence Type

*Absence Description:

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:

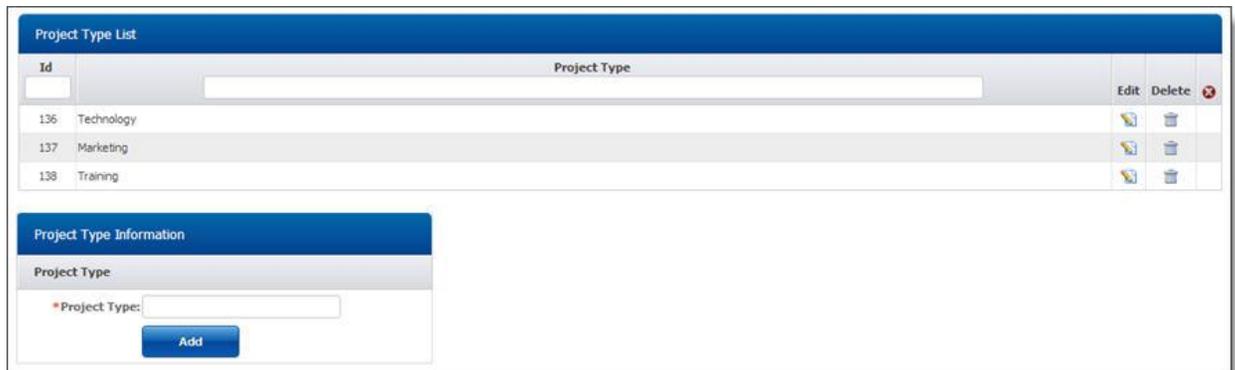
1. In [Absence Type List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

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 table with columns for 'Id', 'Status Type', 'Status', 'Edit', and 'Delete'. Below the table is a 'Status Information' form with a dropdown for 'Status Type' (set to 'Account') and a text input for 'Status'. An 'Add' button is located below the form.

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

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
130	002	Bob	Bingham	Development	US (Head Office)				Time Off	Projects	Cost Center
131	003	Mike	Boltz	Development	US (Head Office)				Time Off	Projects	Cost Center
132	004	Ryan	Culver	Development	US (Head Office)				Time Off	Projects	Cost Center
133	005	Bob	Foppiano	Development	US (Head Office)				Time Off	Projects	Cost Center
134	006	Brian	Gardner	Development	US (Head Office)				Time Off	Projects	Cost Center
148	007	Rich	Jackson	Quality Assurance	US (Head Office)				Time Off	Projects	Cost Center
149	008	John	Ramos	Development	US (Head Office)				Time Off	Projects	Cost Center
150	009	Steve	Elsworth	Development	Canadian Branch				Time Off	Projects	Cost Center
151	010	Jackie	Alves	Development	US (Head Office)				Time Off	Projects	Cost Center

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:

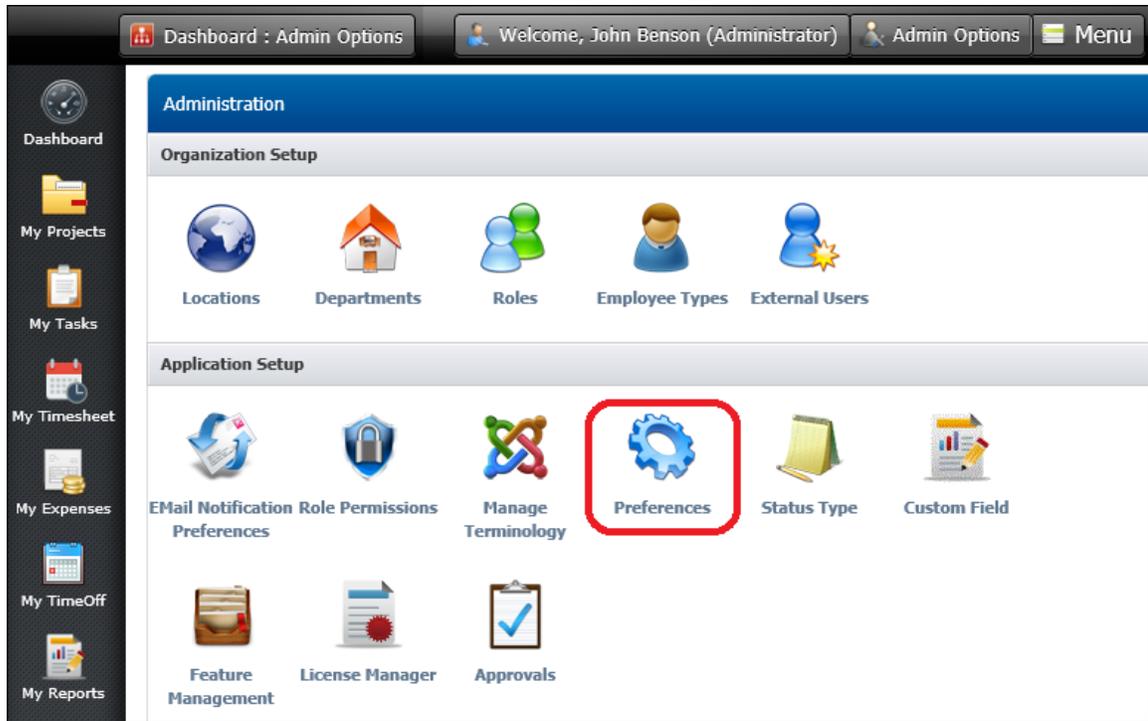
1. In [External User List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

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,

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

Scheduled Email Sent Time	Through this field, Administrator can schedule email sending time. It could be 09:00 or 16:00
Session Out Time	Due to security risk, Administrator can set minutes after TimeLive session may expire due to inactivity
Page Size	This drop-down, allow user to view number of Records in one page. (10,20,30,40,50)
From Email Display Name	This field allow administrator to change Automatic email sender name according to organization need
From Email Address	This field allow administrator to change sender default email address according to its organization
Standard and Formats	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)
Show Employee Name By	This drop-down allow administrator to use either First Name and Last Name or Last Name and First Name in TimeLive
Company Own Logo & Show Company Own Logo	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.

Show Project Name In Invoice Report	Through this check, Project Name will be shown in the generated Invoice
Show Billing Rate In Invoice Report	Through this check, Billing Rate of the Project will be shown

Show Entry Date In Invoice Report	If this check is applied, Entry date will be shown in the Invoice
Show Employee Name In Invoice Report	If this check is applied, Employee name will reflect in the generated Invoice
Show Work Type In Invoice Description	Through this option, Work Type will reflect in Invoice Description
Round-Off Tax Value In Invoice	Through this option, Tax Value will be Round Off in the generated Invoice
Invoice No Prefix	With this option, Administrator can set Invoice No. Prefix
Invoice Billing Type	Through this Drop-Down, Administrator can select between Hours or Days Billing Type
Invoice Footer	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 an unchecked checkbox, 'Show Client Name In Task' with an unchecked checkbox, and 'Sort Task By' with a dropdown menu set to 'Deadline Date'. At the bottom right, there are 'Update' and 'Cancel' buttons.

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

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:

Auto Generate Project Code	Through this check, Project Code will be generated by System
Show Completed Project In Project List	If this check is enabled, Completed projects can be shown in Project Grid
Show Client Department In Project	By enabling this check, Client Department will appear in Project Grid
Include Current Year In Project Code	By enabling this check, TimeLive Application will include current year in Project Code. i.e. 2016 -XXX
Automatically Include Administrator In Project Team	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
Show Disable Project In Report	Through this check, All Disabled Projects will be shown in Reports and its Drop-Down
Project Template Mandatory	If this check is enabled, Administrator/User must select Project Template during Project Creation (See Project Template)
Project Code Prefix	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

Show TimeOff in Timesheet	Through this check, Time Off will be available in My Timesheet for users to input their Time Off
Show Project for TimeOff	Through this check, Project selection will be possible while submitting Time Off Request
Show Time Off in Days	Through this check, Time Off will be calculated in days with reference to hours set in Working Days
TimeOff Status Edit Mode	If this check is enabled, user can edit their submitted TimeOff data from Time Off Request Page
Show Timeoff Types By	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

Show Client In Expense Sheet	If this check is enabled, user can select Client while creating new Expense Sheet
Show Task in Expense Sheet	If this check is enabled, user can select Task for which they want to have Expense Sheet
Expense Sheet Print Footer	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

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

	Time/Total Time
Show Completed Project in Timesheet	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
Show Work Type in Timesheet	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
Show Cost Center in Timesheet	Through this check, Cost Center drop-down will be available for users to select
Show Copy Timesheet Button	This option allow Copy Timesheet Button to be visible in users timesheet (View My Timesheet)
Show Copy Activities Button In Timesheet	This option allow Copy Activities Button to be visible in users timesheet (View My Timesheet)
Enable Offline Timesheet	This option allow Offline Timesheet Button to be visible in users timesheet (View My Timesheet)
Show "Show All" Check in Approval	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
Show Task Percentage in Timesheet	This option allow users to input Percentage along with their time spent in that task. Percentage is linked directly to the task
Calculate Task percentage Automatically	This option automatically calculates task percentage
Auto Adjust Timesheet	This option will automatically adjust My Timesheet Layout according to enable fields and their width
Number of Blank Rows in Timesheet	This option allow administrator to control number of lines for TimeEntry. By default it is 2 . When both lines are filled and records are saved, 2 extra blank lines will appear for TimeEntry
Timesheet Period Overdue	Through this option, Administrator can set number of Overdue period reporting on Overdue email notification (See Email Notifications)
Show Clock Start/End by	This drop-down allow administrator to choose between Account/Employee
TimeEntry Hours Format	This drop-down option allow administrator to select between Time format (HH:MM) or Decimal format (1.5 ie. 1 Hour 30 Mins. or 5.75 ie. 5 Hours 45 Mins.)
TimeEntry Clock Format	This drop-down option allow administrator to select between 24 Hour format (HH:MM) or 12 Hour format (HH:MM AM/PM)
Show additional Task Information Type in Timesheet	This drop-down option allow administrator to select between some additional task information to be reflected in My Timesheet (Parent Task Name, Parent Task Code, Task Code or Task Type) Administrator can select any

	one.
Show additional Project Information Type in Timesheet	This drop-down option allow administrator to select between some additional Project information to be reflected in My Timesheet (Project Code)
Default Time Entry Mode	This drop-down option allows Administrator to select between Day-View or Period View for default My Timesheet View.
Sort Timesheet By	This drop-down option allows administrator to select sorting of My Timesheet according to Client or by Default (Time Entry)
Show Cost Center In Timesheet by	This drop-down option allows administrator to select between Account or Employee to show their Cost Center
Timesheet Print Footer	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, Date, Edit, and Delete. The table contains one row for the year 2013 with the holiday name 'Official Off' and a date of 5/30/2013. Below the table is a 'Holiday Information' form with a 'Holiday' section. This section includes a 'Holiday Date' field with a date picker set to 5/30/2013, a 'Holiday Name' text input field, and an 'Add' button.

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, 'Job' in the 'User Defined Name' column, and a checked checkbox in the 'Selected' column. There are four empty rows below the first one. At the bottom left of the table is an 'Update' button.

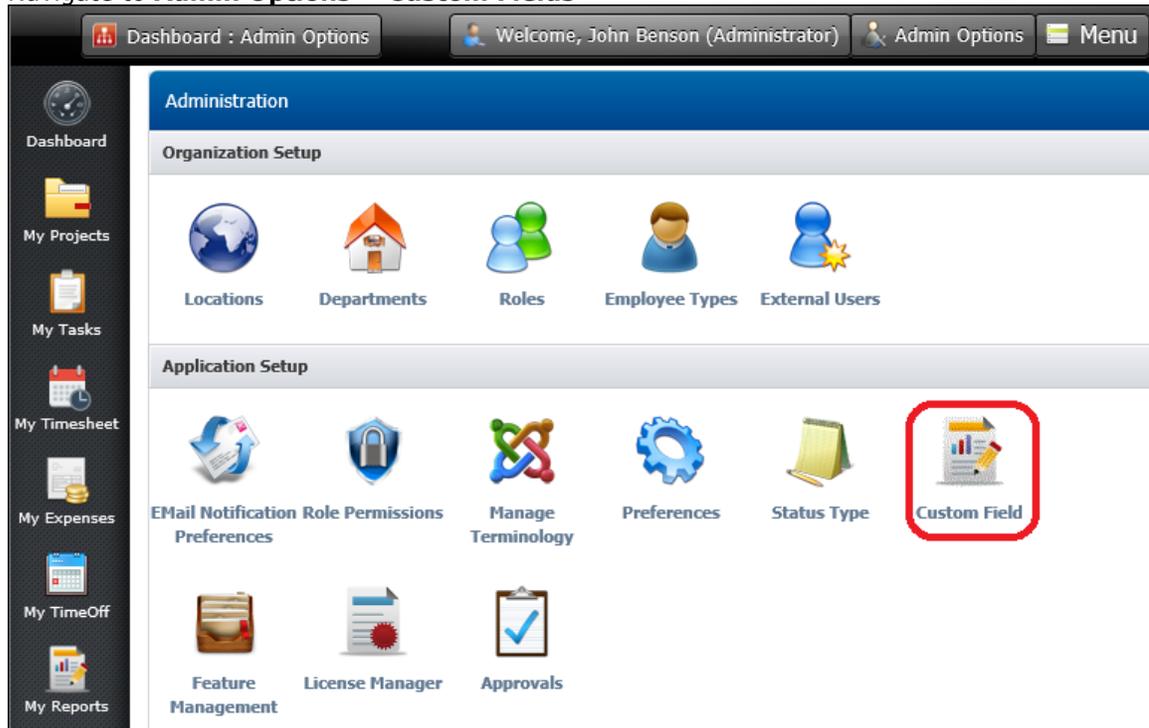
Defining new Manage Terminology:

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:	<div style="border: 2px solid red; padding: 2px;"> Number Text Drop-Down Date </div>
*Custom Field Name:	Contract
*Custom Field Caption:	Contract Type
Default Value:	None <input type="button" value="v"/>
IsRequired:	<input checked="" type="checkbox"/>

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

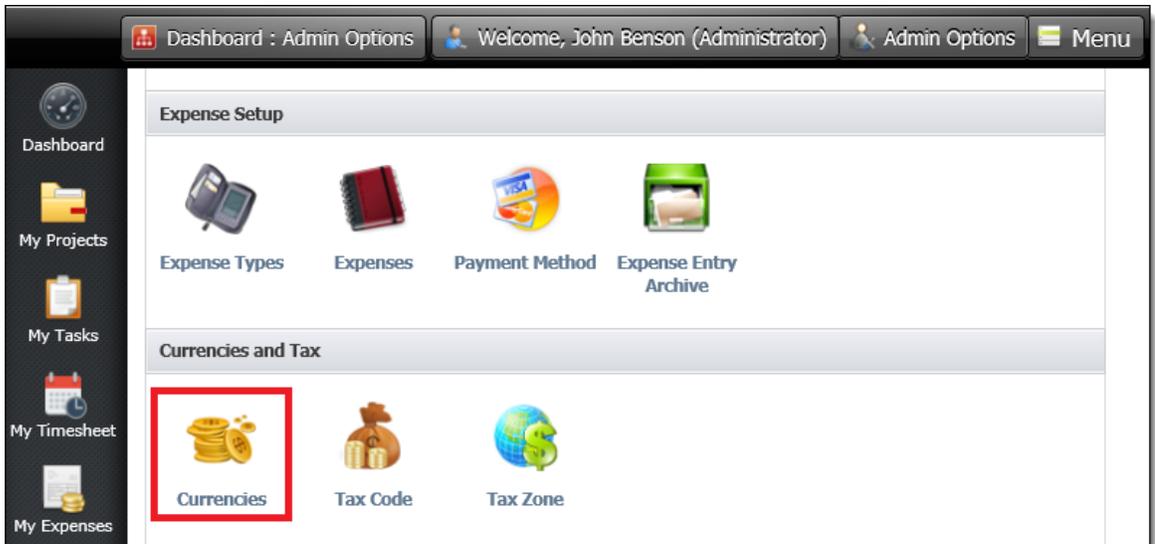
Freelancer

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			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: 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:

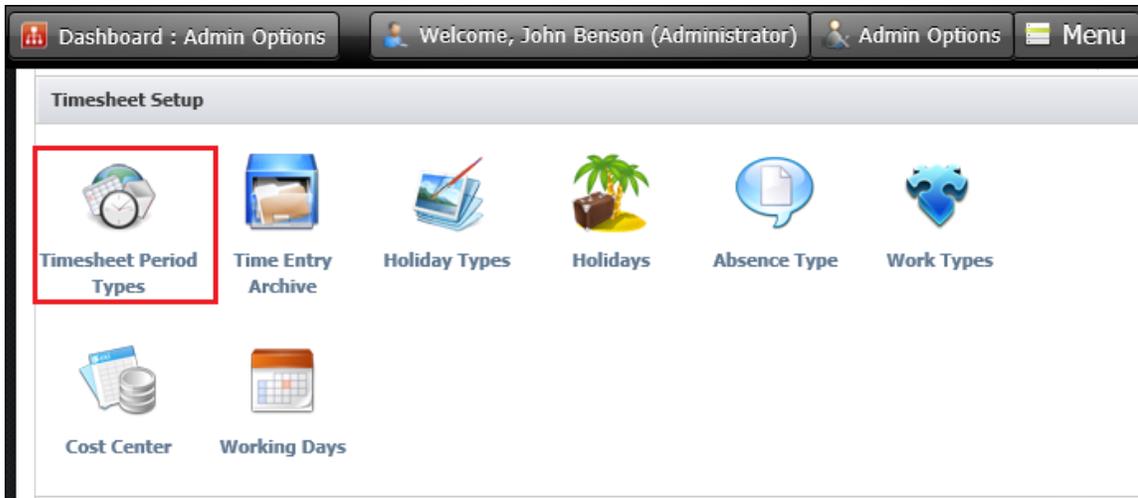
There are two main issues which should always be on the check that

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](#).

The screenshot shows the 'Timesheet Period Types' configuration page. It features a table with the following data:

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

Below the table is a 'Timesheet Period Type Information' form. The form includes a dropdown menu for 'Timesheet Period Type' set to 'Daily' and an 'IsDisabled' checkbox. At the bottom of the form are 'Update' and 'Cancel' buttons.

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
-------------	-----------	-------------	--------	------

User

 Detail Timesheet Report 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
 Attendance Detail Report Generate Attendance detail report for a given user for a given period. User can select different parameters like employee, startdate, enddate.	Customize	Permissions		Copy
 Employee Attendance Summary Report Summary of employee attendance helpful for user and administrator to generate summary of employee attendance for payroll purpose.	Customize	Permissions		Copy
 Employee Absence Detail Report 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
 Absence Summary Report Report for generating summary of employee leave like sick leave, casual leave etc in specified range.	Customize	Permissions		Copy
 Detail Expense Report 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
 Expense Sheet Report Expense Sheet Report	Customize	Permissions		Copy
 Time Entry Period Time Entry Period	Customize	Permissions		Copy
 Employee Time Off Employee Time Off	Customize	Permissions		Copy
 Employee Time Off Detail Employee Time Off Detail	Customize	Permissions		Copy
 Employee Time Off Request Employee Time Off Request	Customize	Permissions		Copy

Project Management

 Timesheet Approval Activity Timesheet Approval Activity	Customize	Permissions		Copy
 Expense Approval Activity Expense Approval Activity	Customize	Permissions		Copy
 Project Cost And Revenue Report Project Cost And Revenue Report	Customize	Permissions		Copy
 Detail Task Report Detail Task Report	Customize	Permissions		Copy
 Task Summary Report Task Summary Report	Customize	Permissions		Copy
 Task Status Summary Report Summary of all project tasks status. Useful for project manager to get a high level view of whole project status.	Customize	Permissions		Copy
 Project Task Employee Report Project Task Employee	Customize	Permissions		Copy
 Project Team Report Project Team Report	Customize	Permissions		Copy
 Timesheet Submission Report Generates an employee-wide summarize report for time entries with missing entries.		Permissions		

Billing

 Billing Report 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
 Expense By Client Report Summary of Expenses incurred on project. Can be generated based on project, client, employee and data range.	Customize	Permissions		Copy
 Department Wise Timesheet Report 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
 Project Expense Detail Report 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
 Invoice Summary Report Summary of Invoice Report.	Customize	Permissions		Copy
 Task Billing By Projects/Clients Customized Generates an employee-wide project summary report with expense detail.	Customize	Permissions		Copy

Audit Trail

 Timesheet Audit Trail Report Generate Timesheet Audit Trail	Customize	Permissions		Copy
 Expense Sheet Audit Trail Report Generate Expense Sheet Audit Trail Report	Customize	Permissions		Copy

Administrator

 All Locations Report				
---	--	--	--	--

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

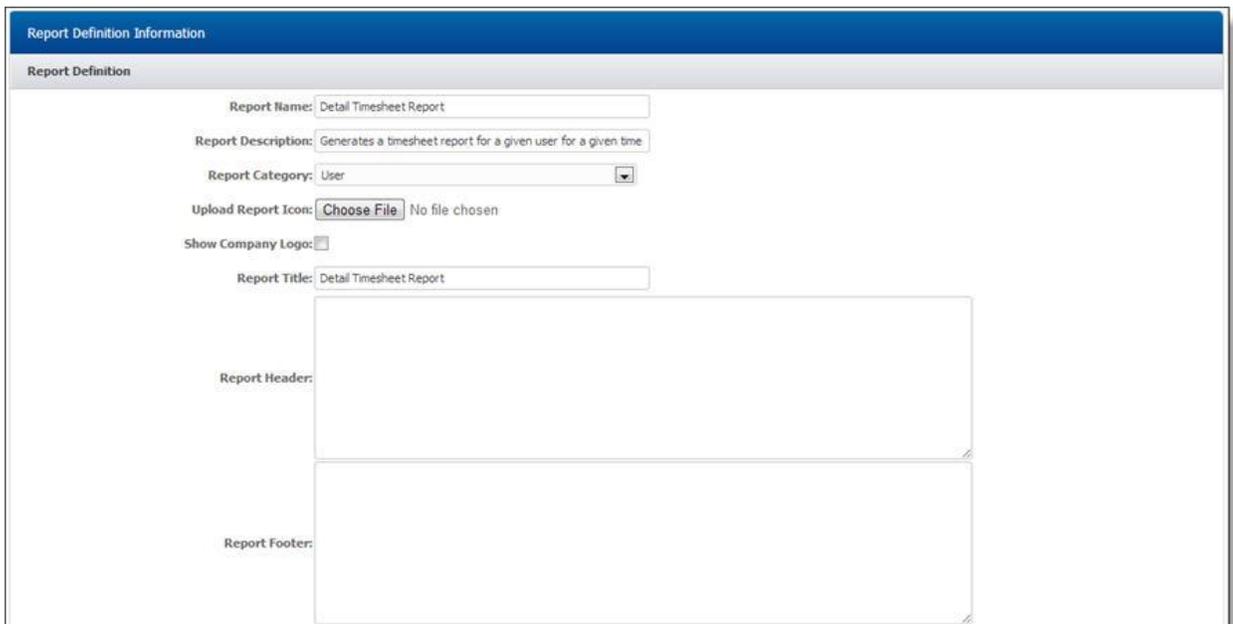
Report Designer Steps:

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 plays 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
		5,795.00	EUR 5,795.00	61.00		
		5,795.00	EUR 5,795.00	61.00		

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 $(2 + 2) / 2 = 2$

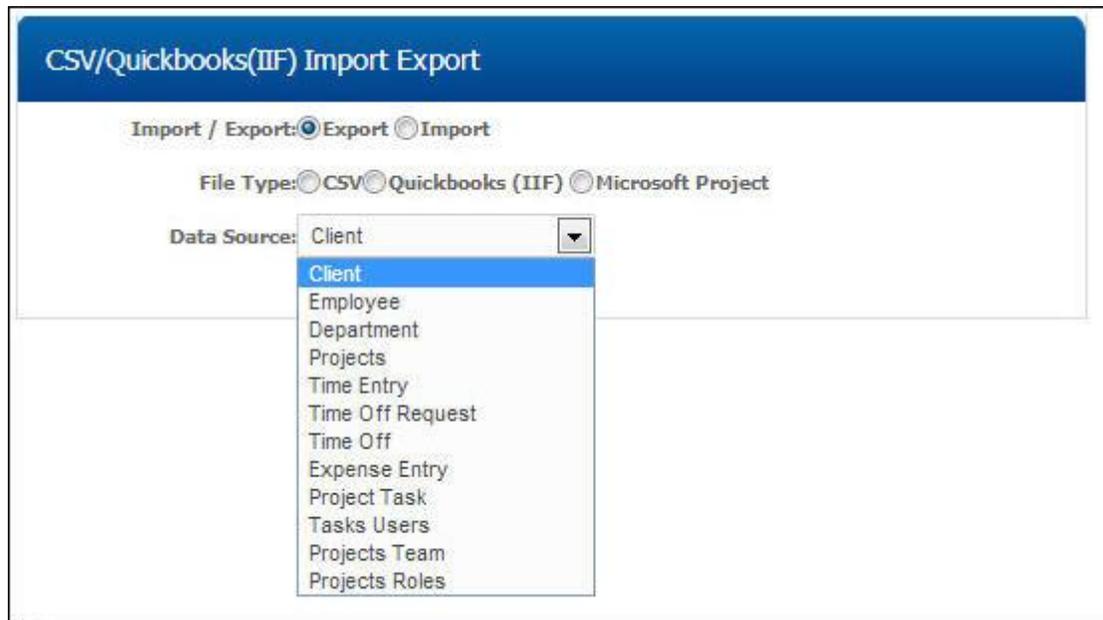
Functions:

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'), 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

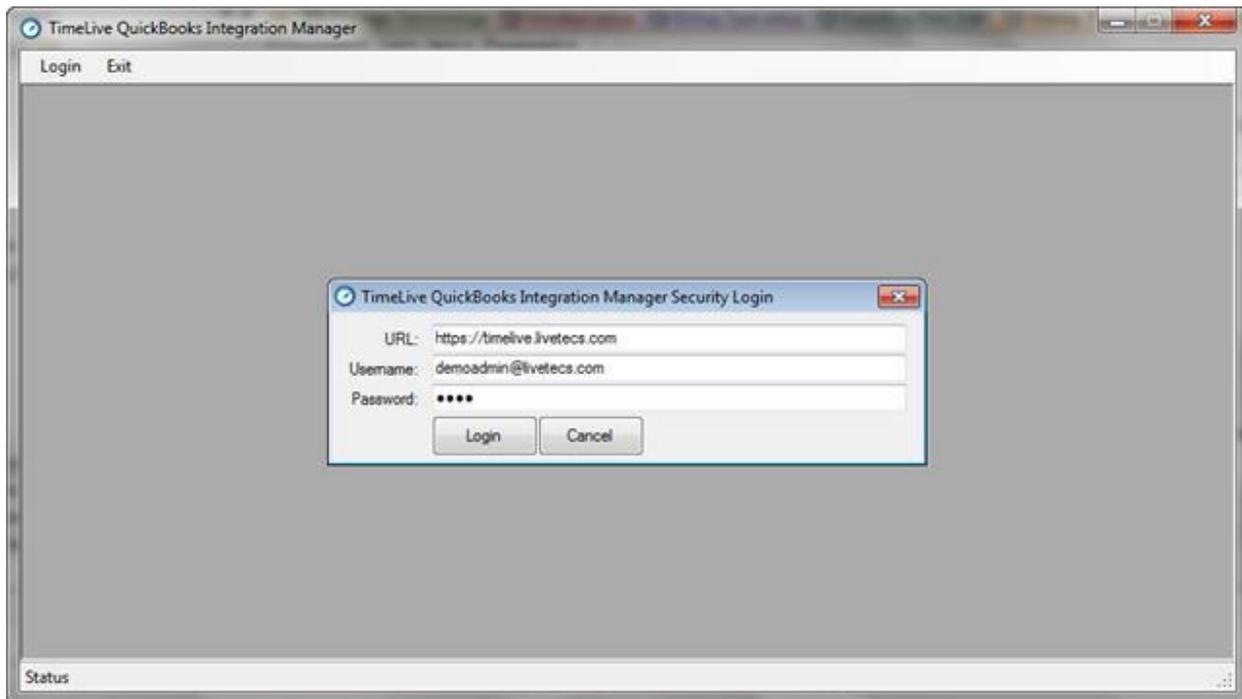
Before attempting to integrate with TimeLive, follow the steps below to ensure QuickBooks is properly configured for integration.

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.

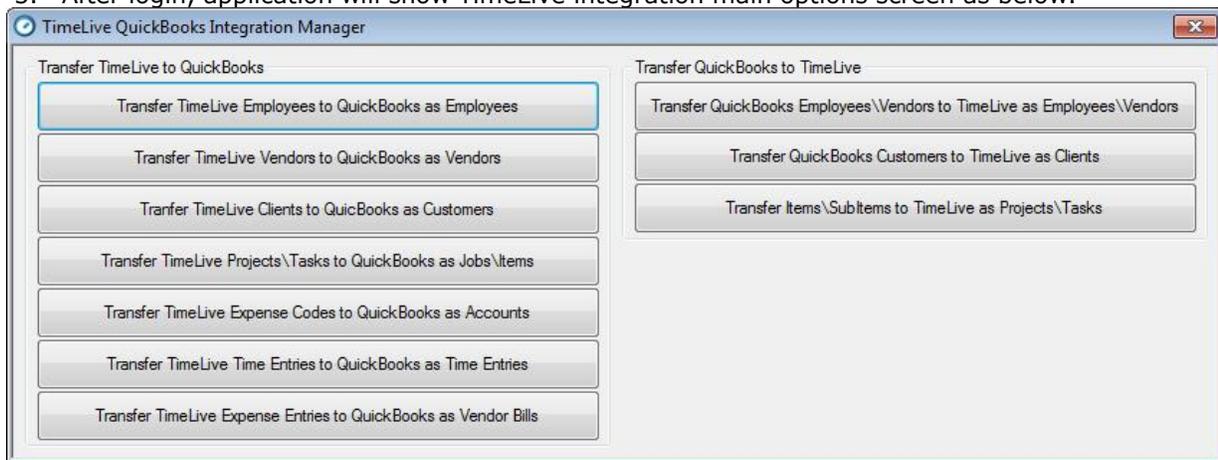
Launching the Module:

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:

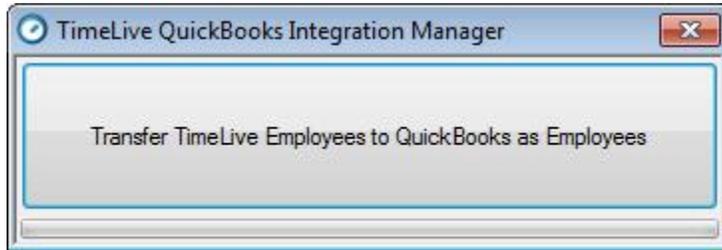
When transferring **[time entries]**, the integration module will use the specified relationship to locate the projects and tasks selected for the time entries in QuickBooks. For example, if a TimeLive **[project]** exists in QuickBooks as a **[job]**, you would typically assign a relationship between **[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.

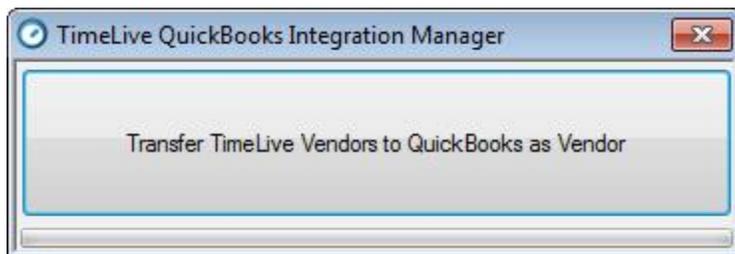
Transferring Vendors"

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



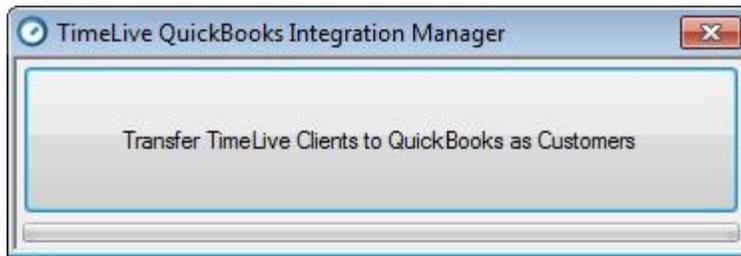
2. After successful, application will show Successful transferred message.

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.



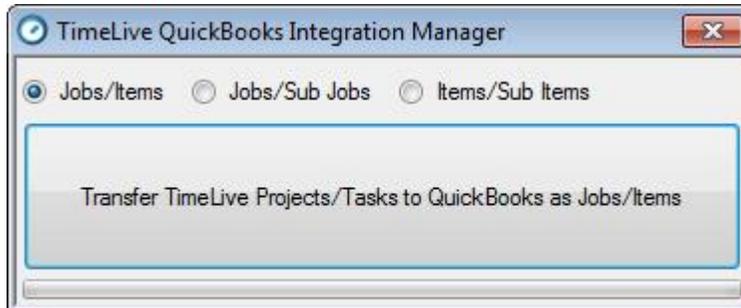
2. After successful, application will show Successful transferred message.

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.



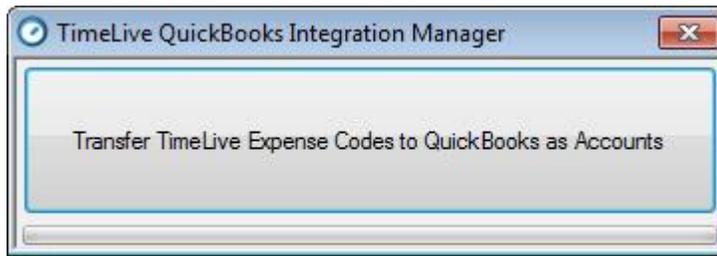
3. After successful, application will show Successful transferred message.

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.



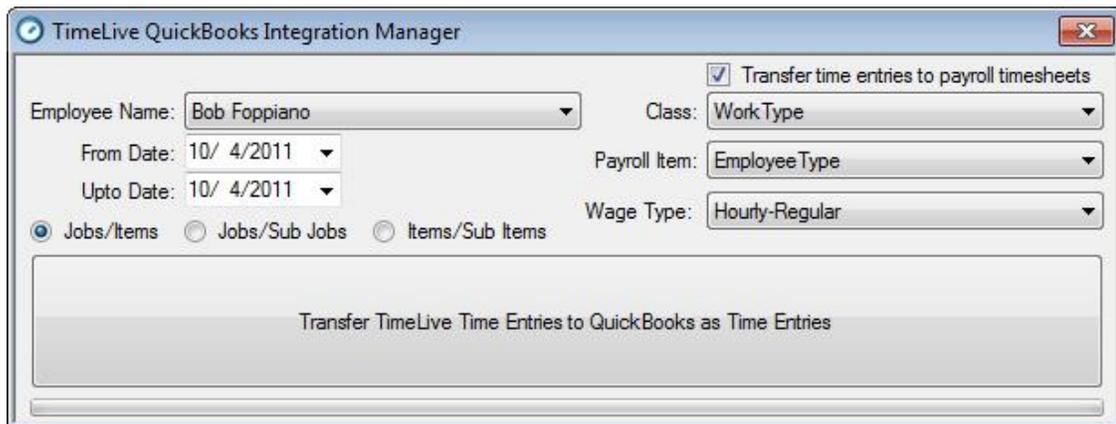
2. After successful, application will show Successful transferred message.

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

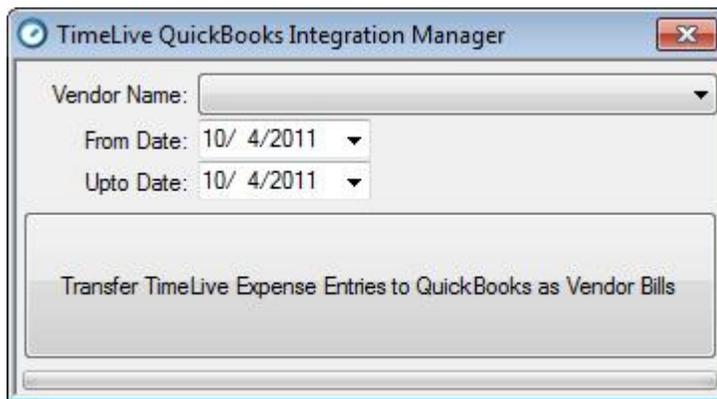
6. Select mapping of QuickBooks [**Payroll Item**] mapping with TimeLive data. You can select either of these option for mapping of Payroll Items data.
 - <None>
 - Cost Center
 - Department
 - Employee Type
 - Milestone
 - Work Type
7. Select [**Wage Type**] which you want to be populated with your 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) :

- TimeLive Project Clients --> Quickbooks Customer
- TimeLive Employee --> Quickbooks Employee
- TimeLive Billable Task Flag --> Quickbooks Billable Flag
- 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

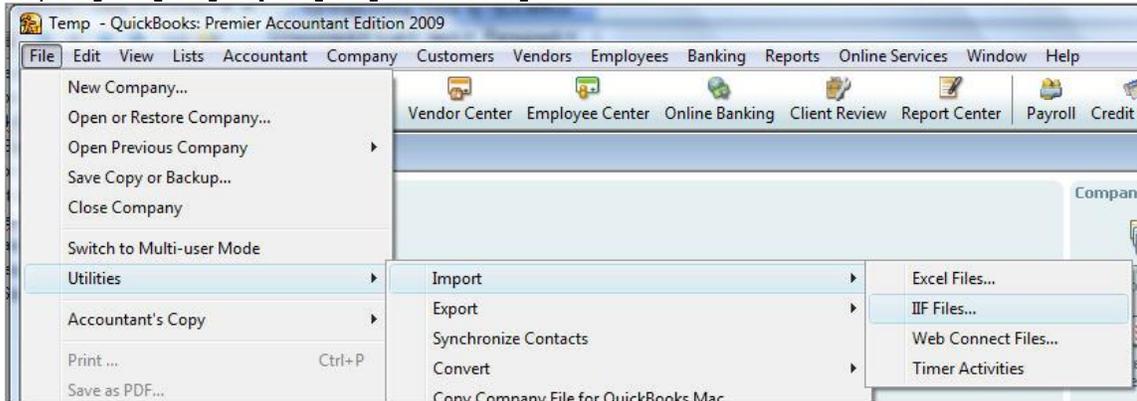
Hide Folders Save Cancel

- This is end of exporting time data to Quickbooks IIF File.

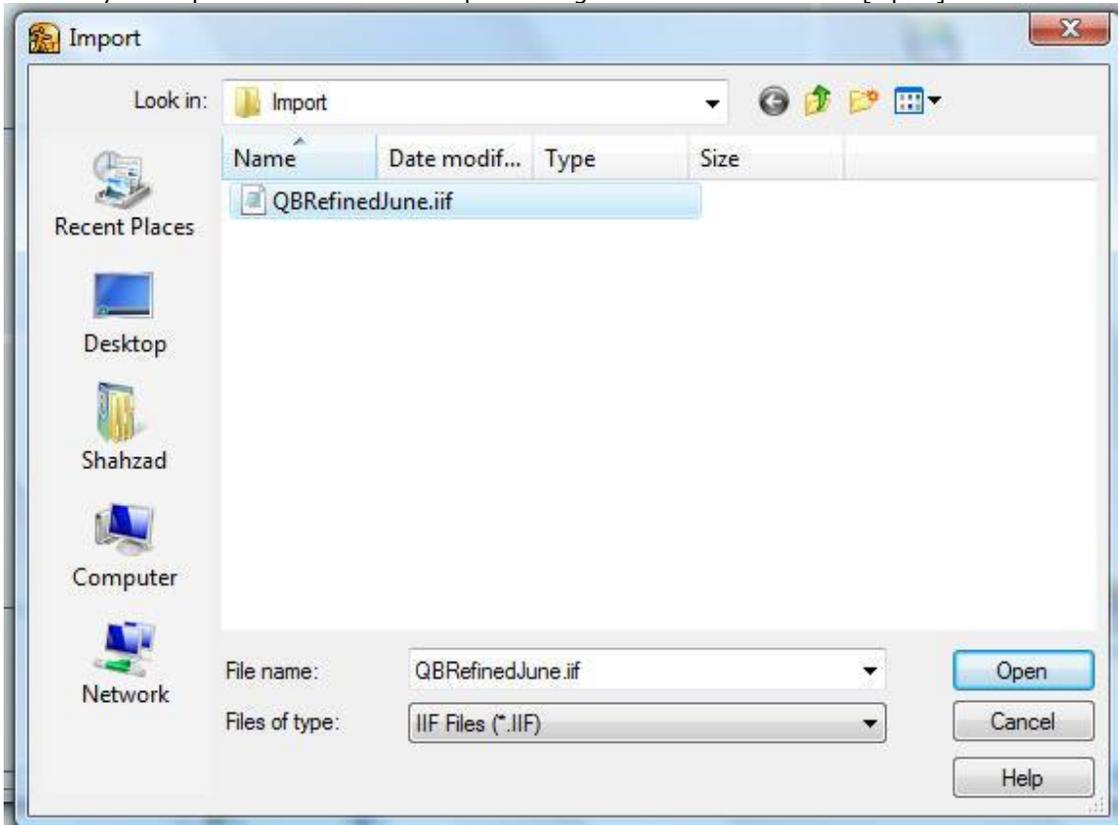
Step 2: Import the exported time data into Quickbooks.

The following steps may be followed to:

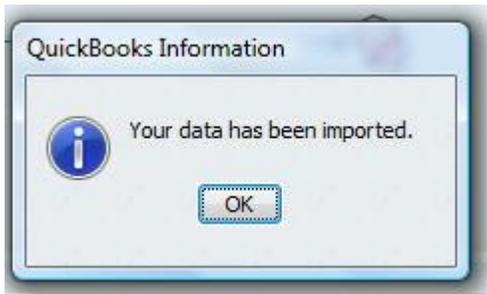
- Launch Quickbooks
- Open **[File]**-->**[Import]**-->**[IIF Files...]**



- Select your exported IIF File in File open dialog box and then click on [Open].

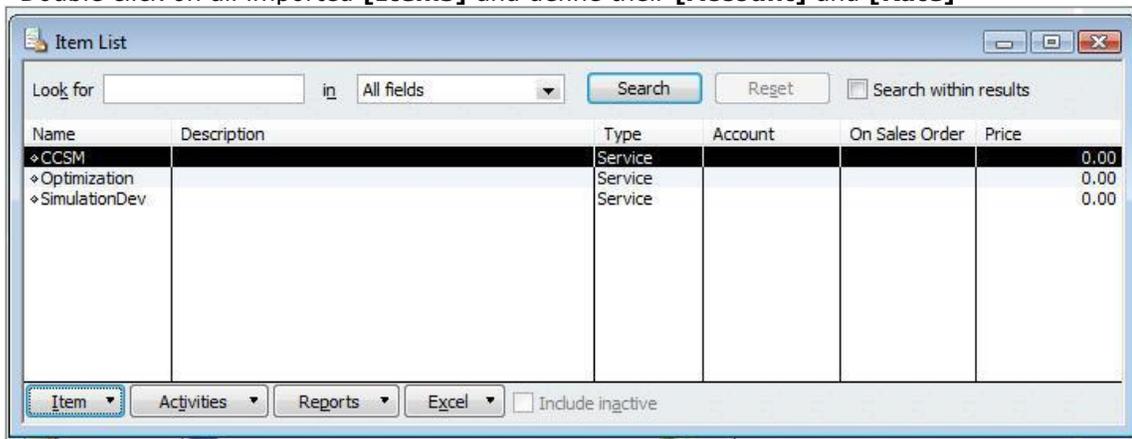


- Quickbooks will show completed message after import.



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...

This service is used in assemblies or is performed by a subcontractor or partner

Description: Rate: 120.00 Account: Consulting Income

[How can I set rates by customers or employees?](#)

Buttons: OK, Cancel, Custom Fields, Spelling, Item is inactive

- Define billing rate and Account of all TimeLive imported items.

Item List

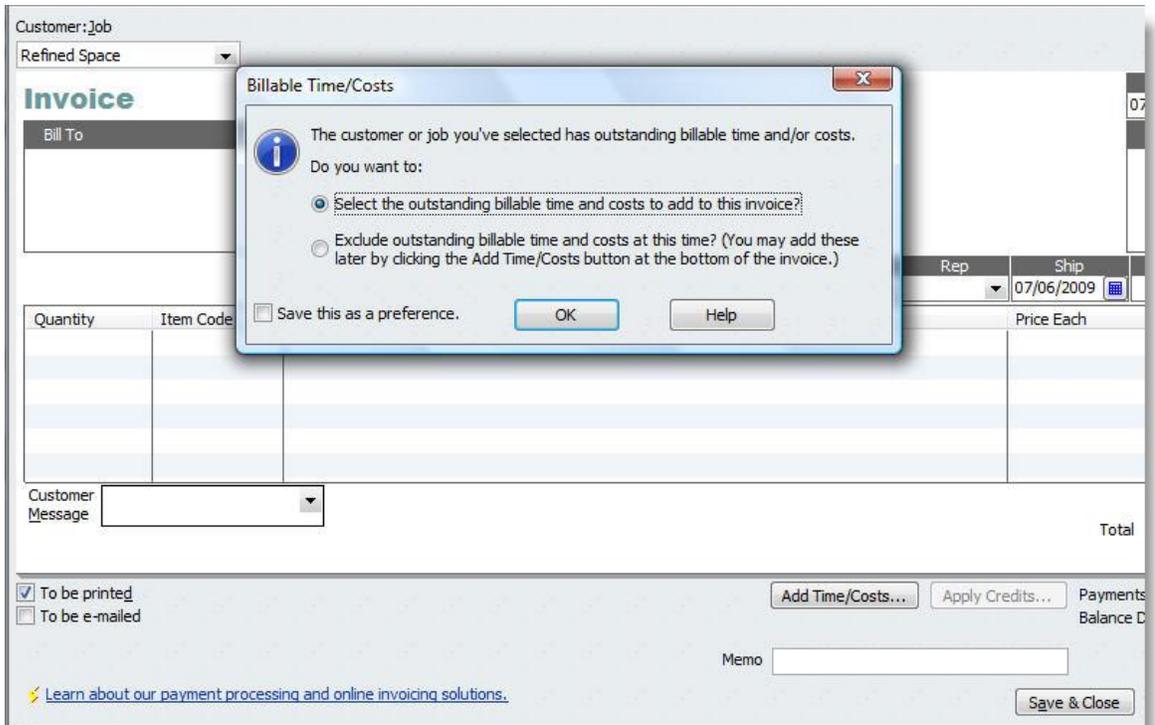
Look for: in: All fields Search within results

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

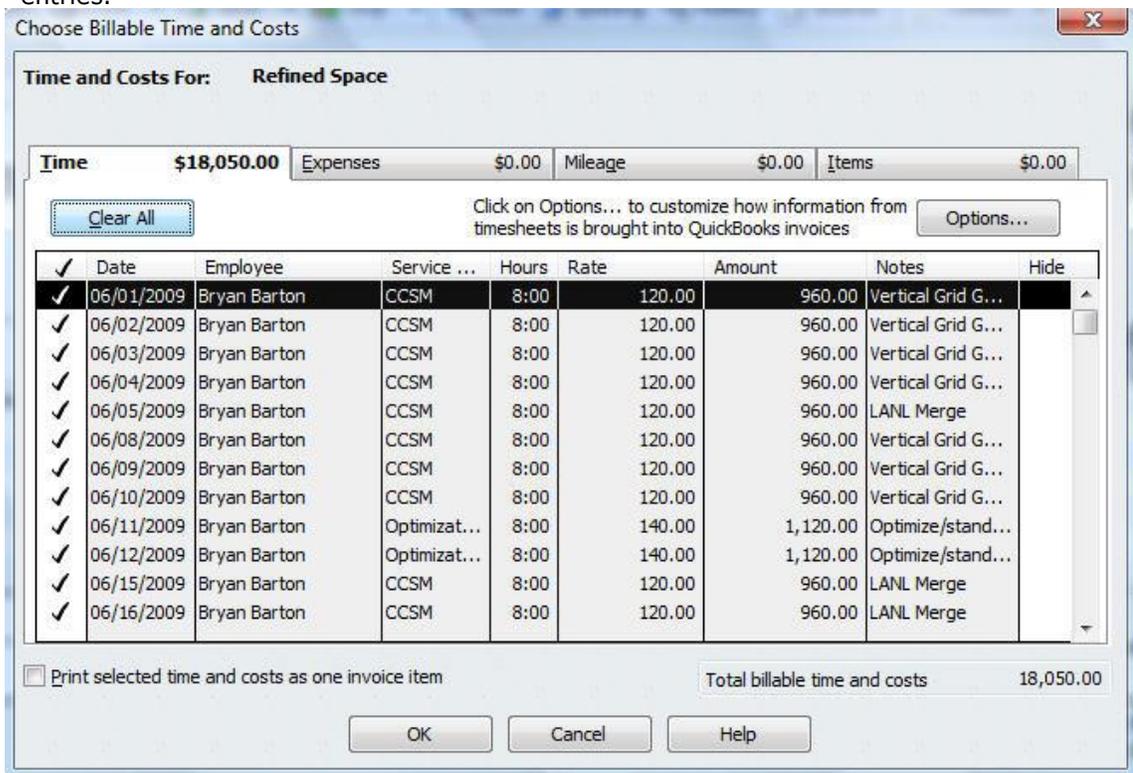
Buttons: Item, Activities, Reports, Excel, Include inactive

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.

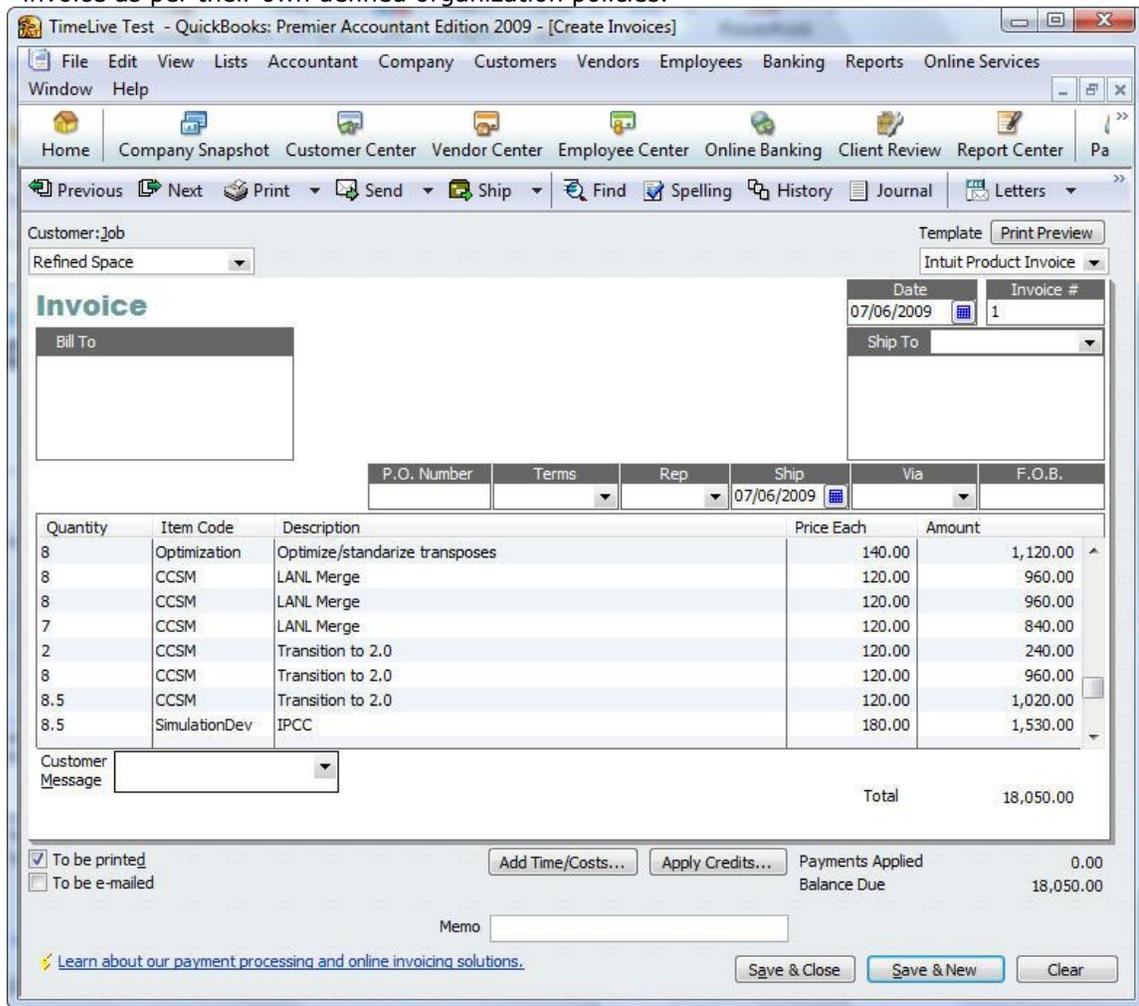


- Click on **[OK]** to import all outstanding billable time and cost in Quickbooks Invoice.
- Quickbooks now show all outstanding billing items. Just click on **[Select All]** to select all time entries.



- 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

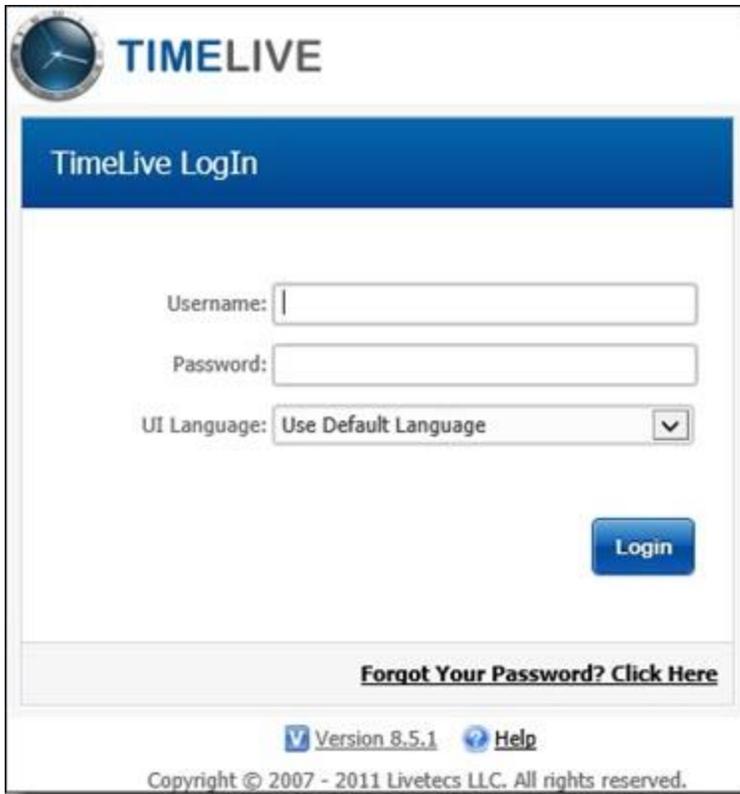
TimeLive Hosted Account can easily be integrated with QuickBooks online.

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**.



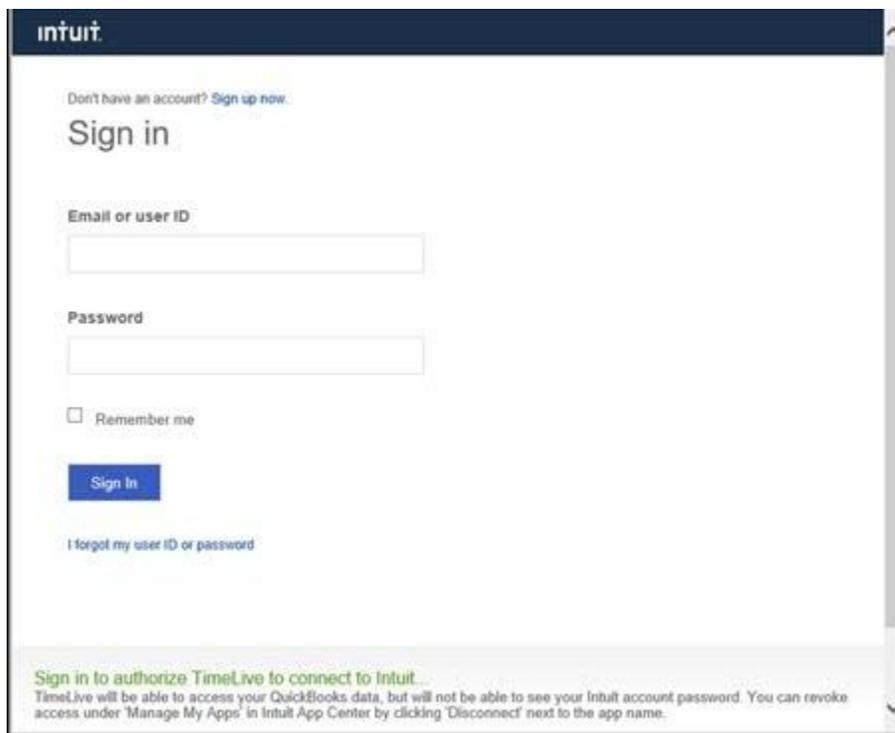
2. Navigate to **Admin Options -- QuickBooks Online Integration**



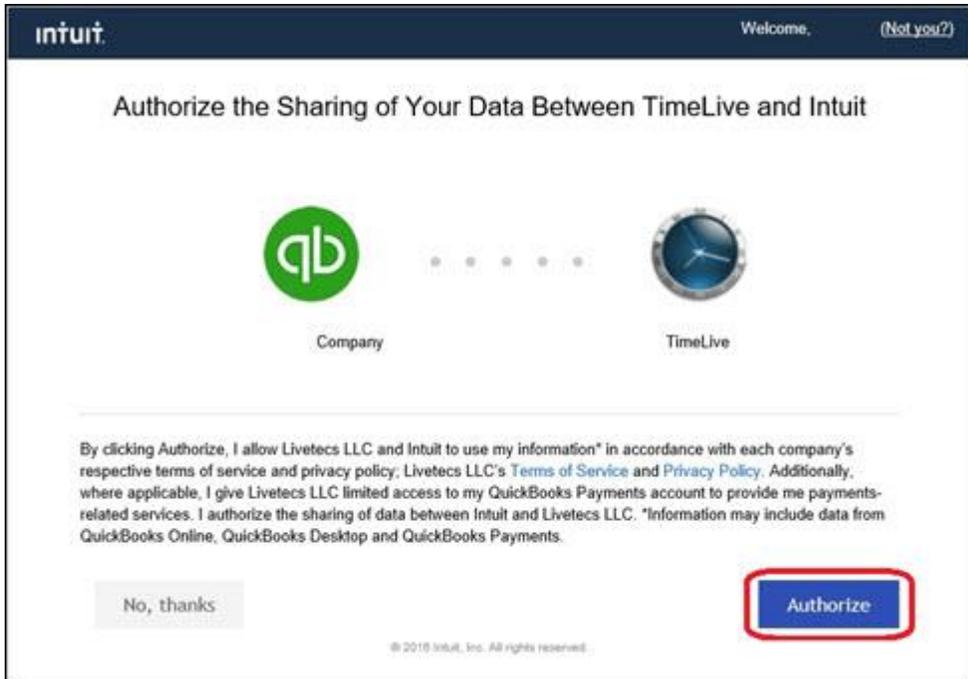
3. Click on **"Connect to QuickBooks"** Button



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
Entitiy	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.

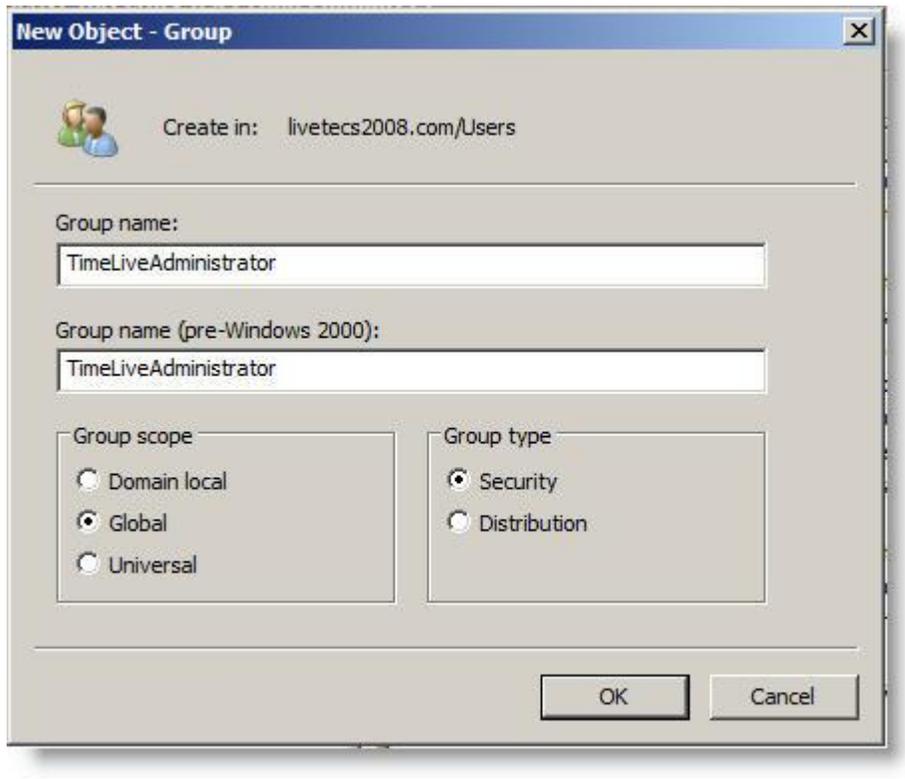
1. IT Administrator should decide first, exactly which Active Directory username will work as TimeLive Administrator. In this help section, we have assume one AD user with username [**LivetecsIT**]
2. Create a new [**TimeLive Service User**]. TimeLive APIs will use this username and password to communicate to Active Directory. Create a service user with name "**timeliveserviceuser**".

The screenshot shows the 'New Object - User' dialog box. At the top, it says 'Create in: livetecs2008.com/Users'. Below this, there are several input fields: 'First name:' with 'TimeLive', 'Initials:' (empty), 'Last name:' with 'ServiceUser', and 'Full name:' with 'TimeLive ServiceUser'. Underneath, 'User logon name:' has 'timeliveserviceuser' and '@livetecs2008.com' selected in a dropdown. 'User logon name (pre-Windows 2000):' has 'LIVETECS2008\'\' and 'timeliveserviceuser'. At the bottom are '< Back', 'Next >', and 'Cancel' buttons.

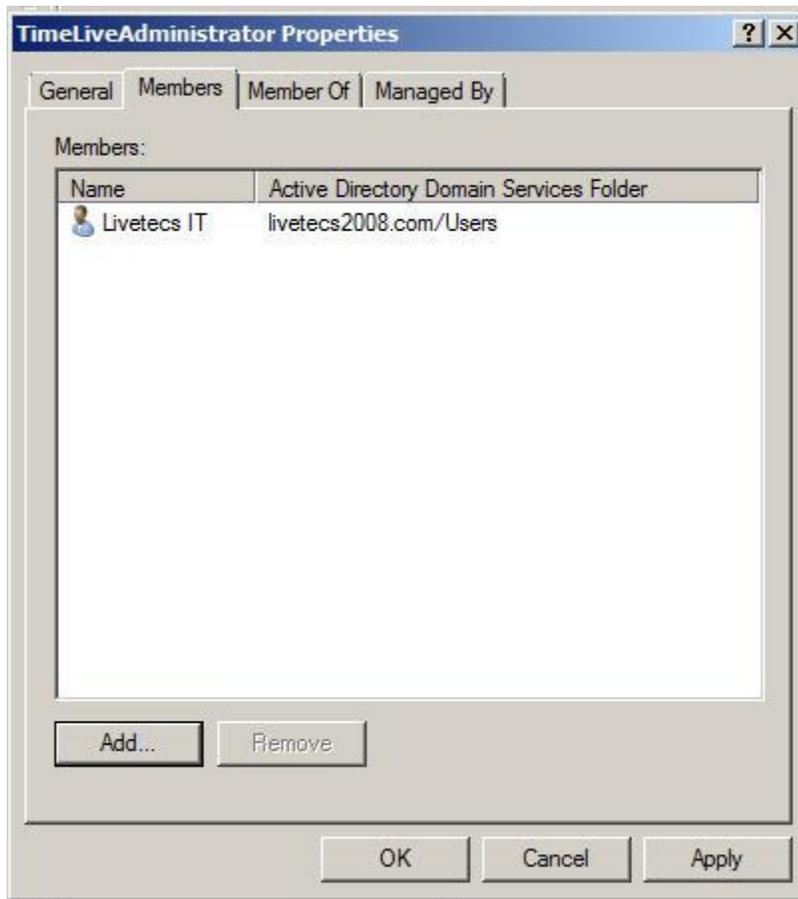
3. Define some password for "TimeLive Service User" and make sure that **[Password never expires]** should be checked and **[User must change password at next logon]** should be unchecked.

The screenshot shows the 'New Object - User' dialog box, now on the password and security options screen. It says 'Create in: livetecs2008.com/Users'. There are two password input fields, both filled with dots. Below them are four checkboxes: 'User must change password at next logon' (unchecked), 'User cannot change password' (unchecked), 'Password never expires' (checked), and 'Account is disabled' (unchecked). At the bottom are '< Back', 'Next >', and 'Cancel' buttons.

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.

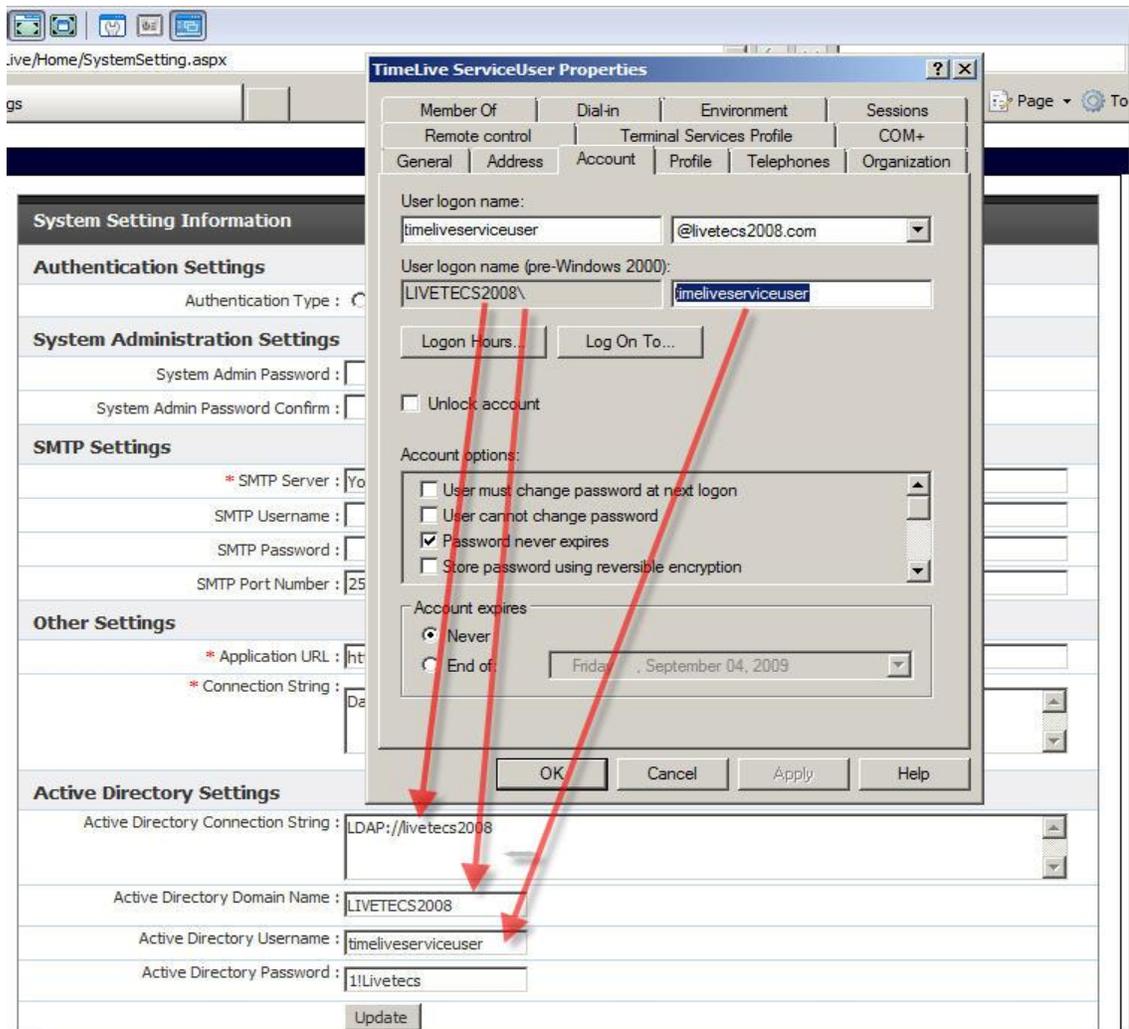


Step 2: Changes required in TimeLive:

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

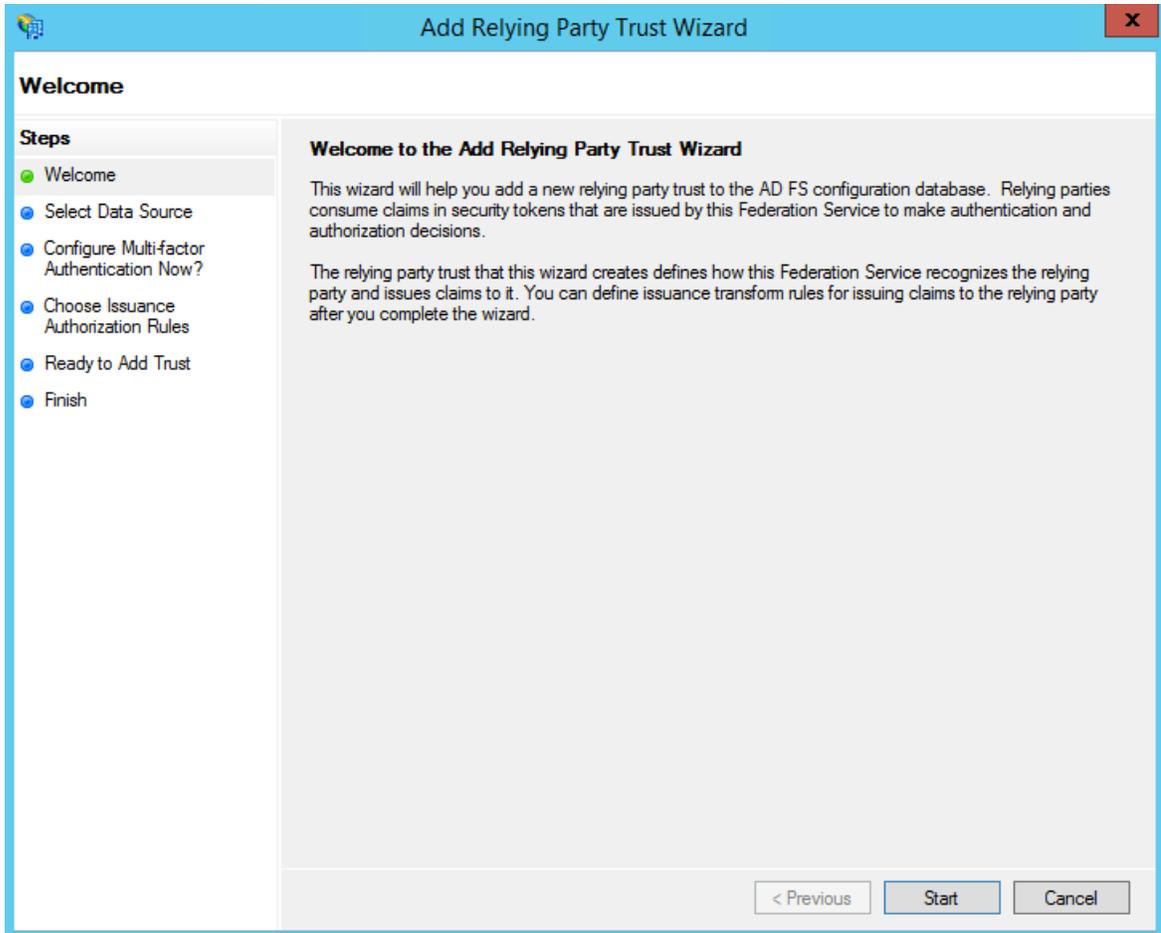
To use ADFS to log in to your TimeLive instance, you need the following components:

- 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**.

Add Relying Party Trust Wizard

Select Data Source

Steps

- Welcome
- Select Data Source
- Specify Display Name
- Choose Profile
- Configure Certificate
- Configure URL
- Configure Identifiers
- Configure Multi-factor Authentication Now?
- Choose Issuance Authorization Rules
- Ready to Add Trust
- Finish

Select an option that this wizard will use to obtain data about this relying party:

Import data about the relying party published online or on a local network
Use this option to import the necessary data and certificates from a relying party organization that publishes its federation metadata online or on a local network.
Federation metadata address (host name or URL):

Example: fs.contoso.com or https://www.contoso.com/app

Import data about the relying party from a file
Use this option to import the necessary data and certificates from a relying party organization that has exported its federation metadata to a file. Ensure that this file is from a trusted source. This wizard will not validate the source of the file.
Federation metadata file location:

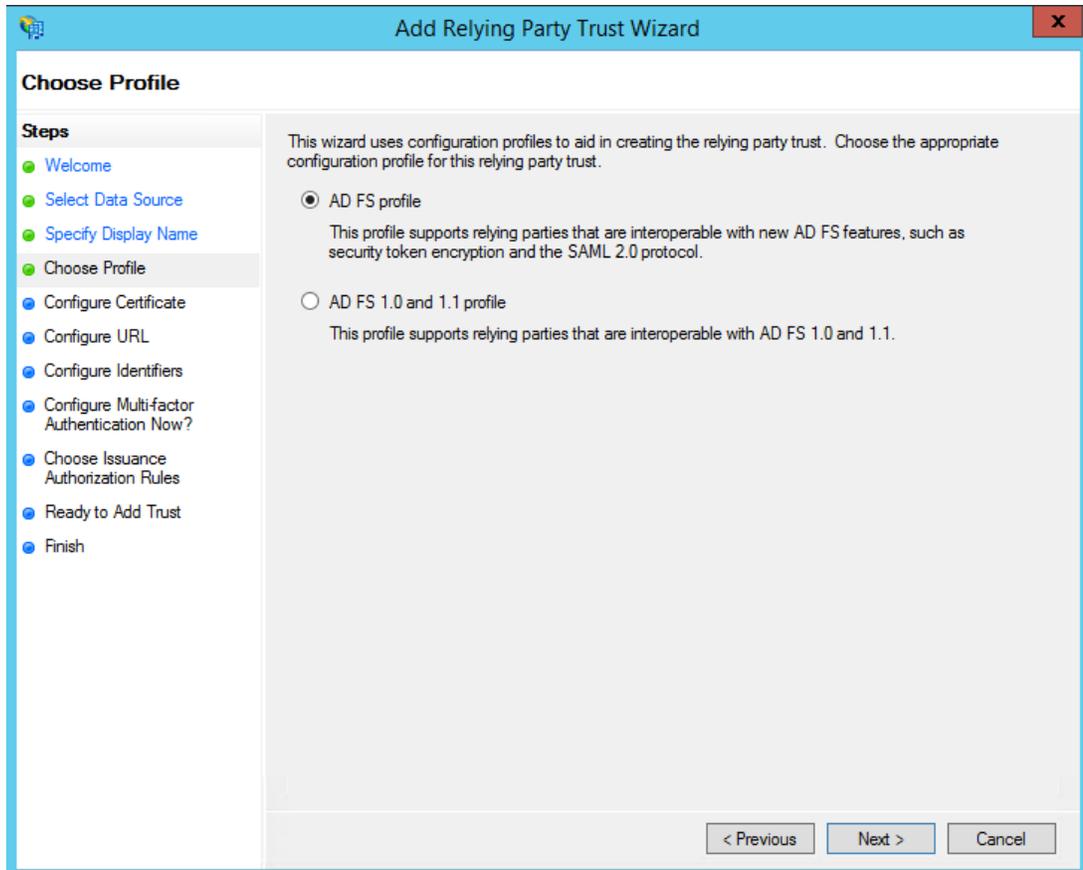
Enter data about the relying party manually
Use this option to manually input the necessary data about this relying party organization.

< Previous Next > Cancel

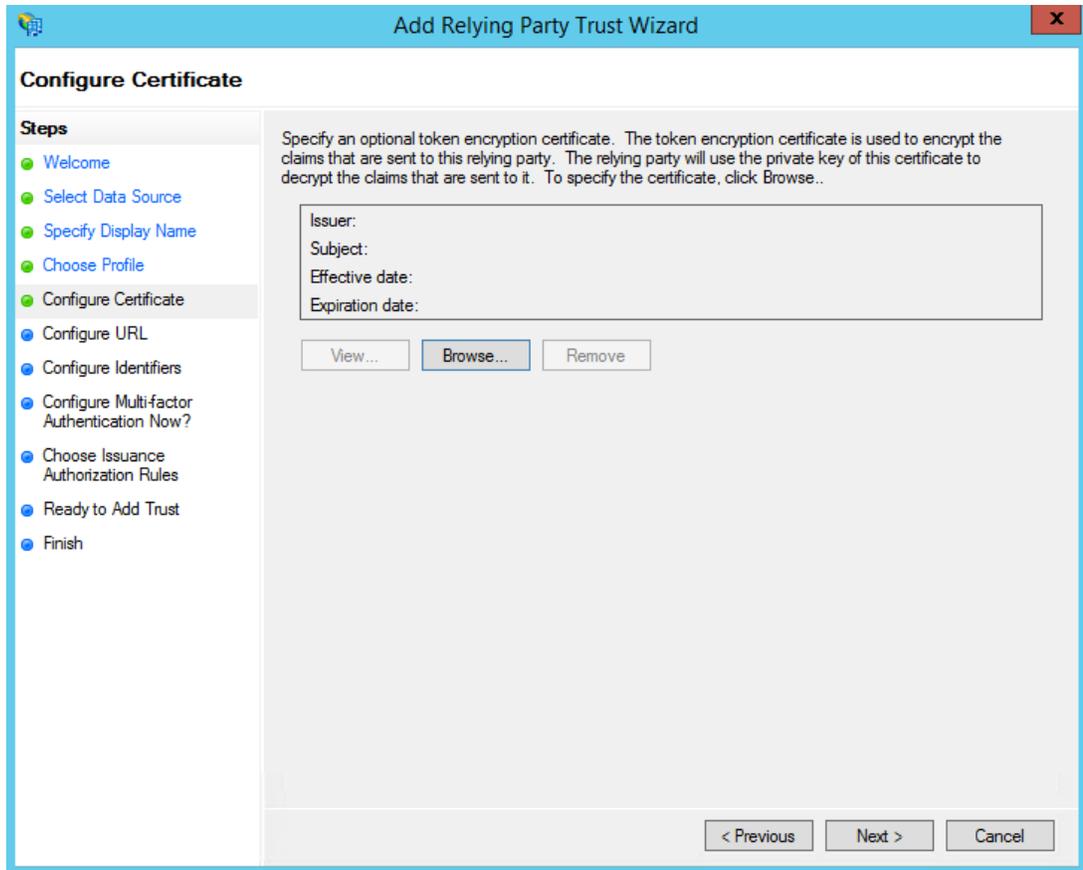
2. On the next screen, enter a **Display name** that you'll recognize in the future, and any notes you want to make.

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".

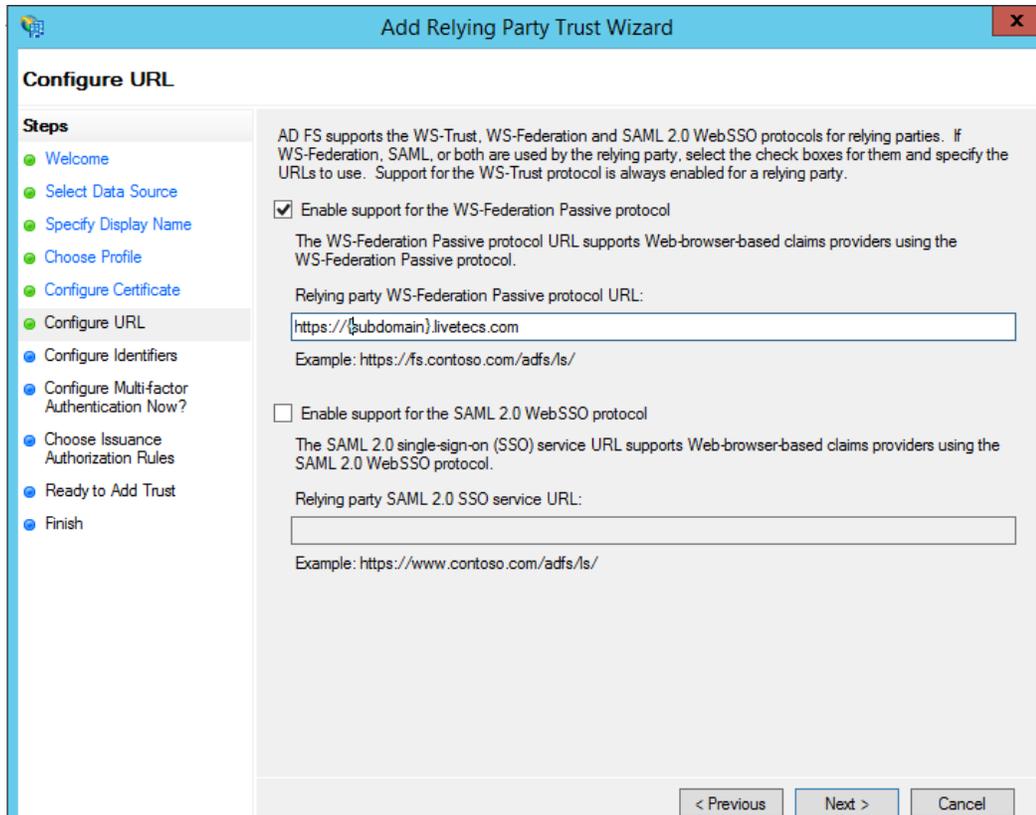
3. On the next screen, select the **ADFS FS profile** radio button.



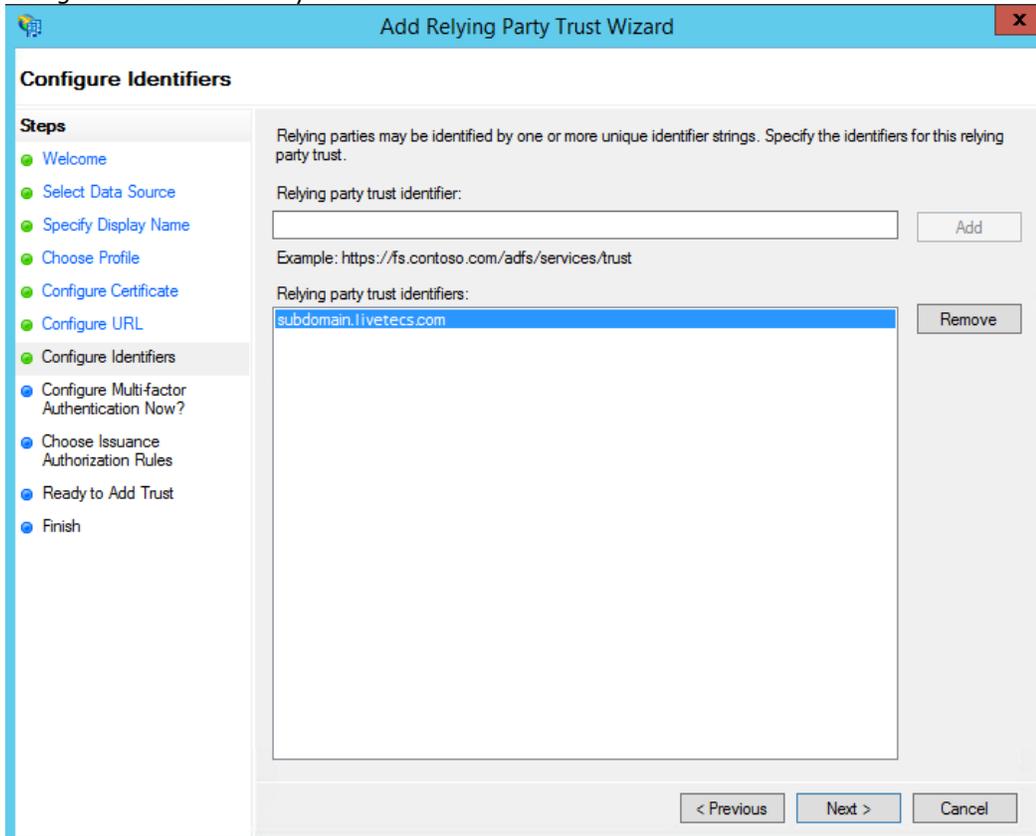
4. On the next screen, leave the certificate settings at their defaults.



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.

Configuring Authentication Policies.' At the bottom right are three buttons: '< Previous', 'Next >', and 'Cancel'."/>

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

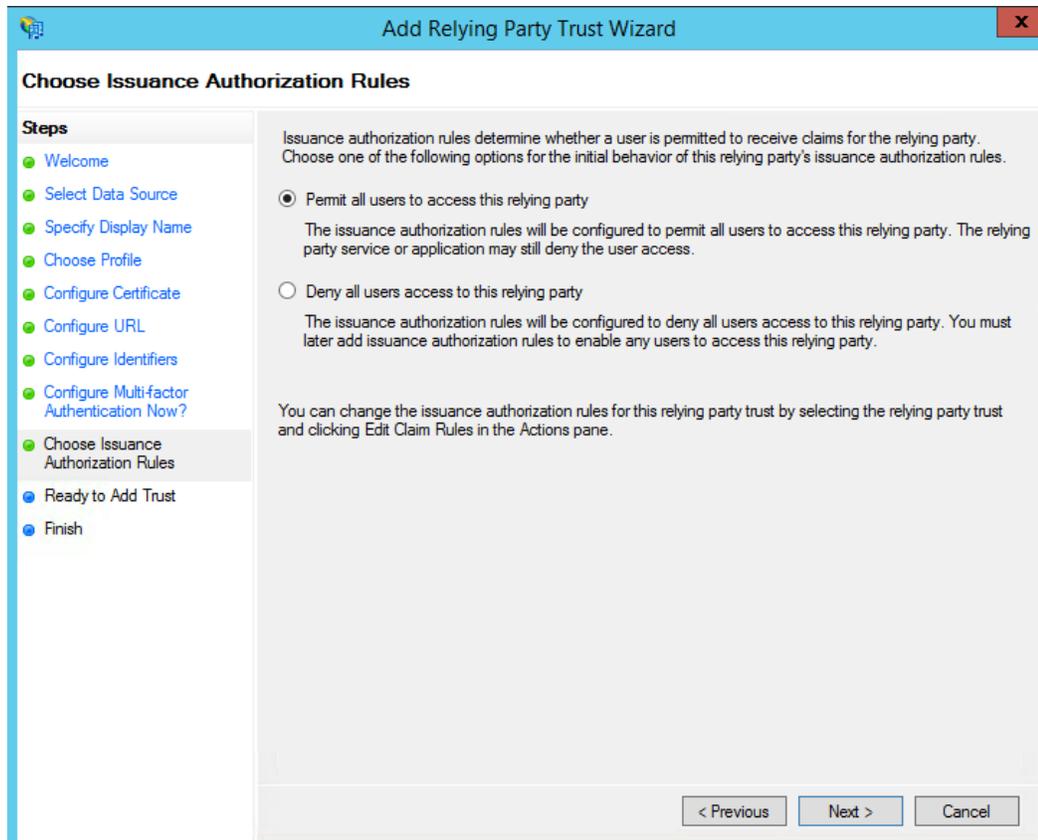
I do not want to configure multi-factor authentication settings for this relying party trust at this time.

Configure multi-factor authentication settings for this relying party trust.

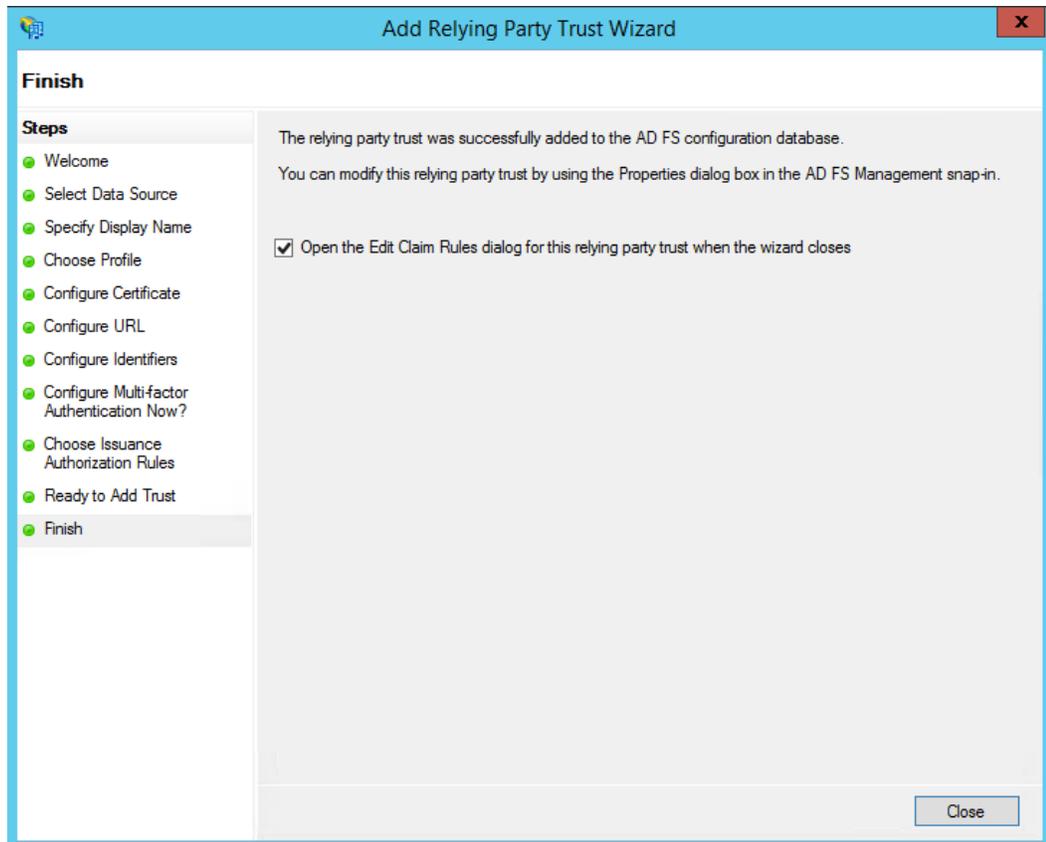
You can also configure multi-factor authentication settings for this relying party trust by navigating to the Authentication Policies node. For more information, see [Configuring Authentication Policies](#).

< Previous Next > Cancel

8. On the next screen, select the **Permit all users to access this relying party** radio button.

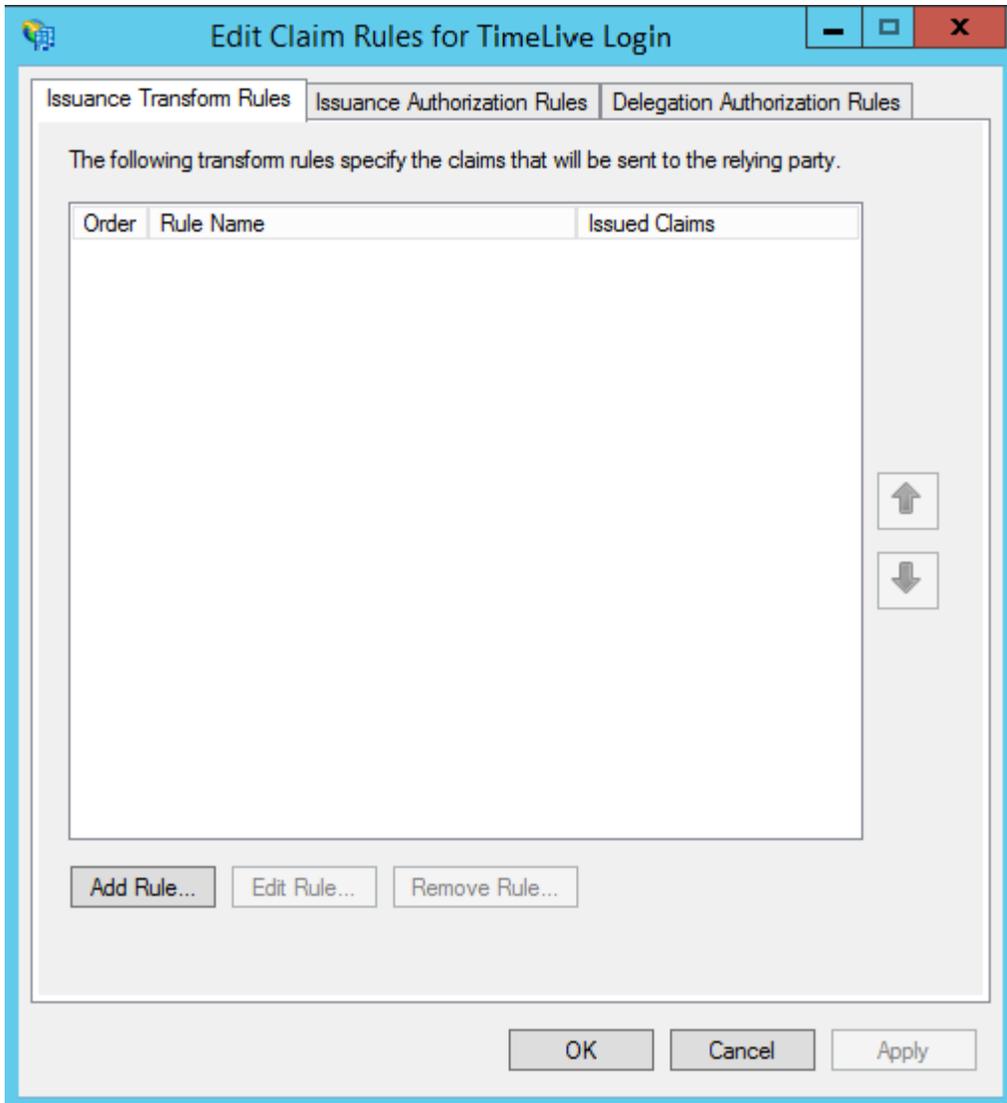


9. On the next two screens, the wizard will display an overview of your settings. On the final screen use the **Close** button to exit and open the Claim Rules editor.

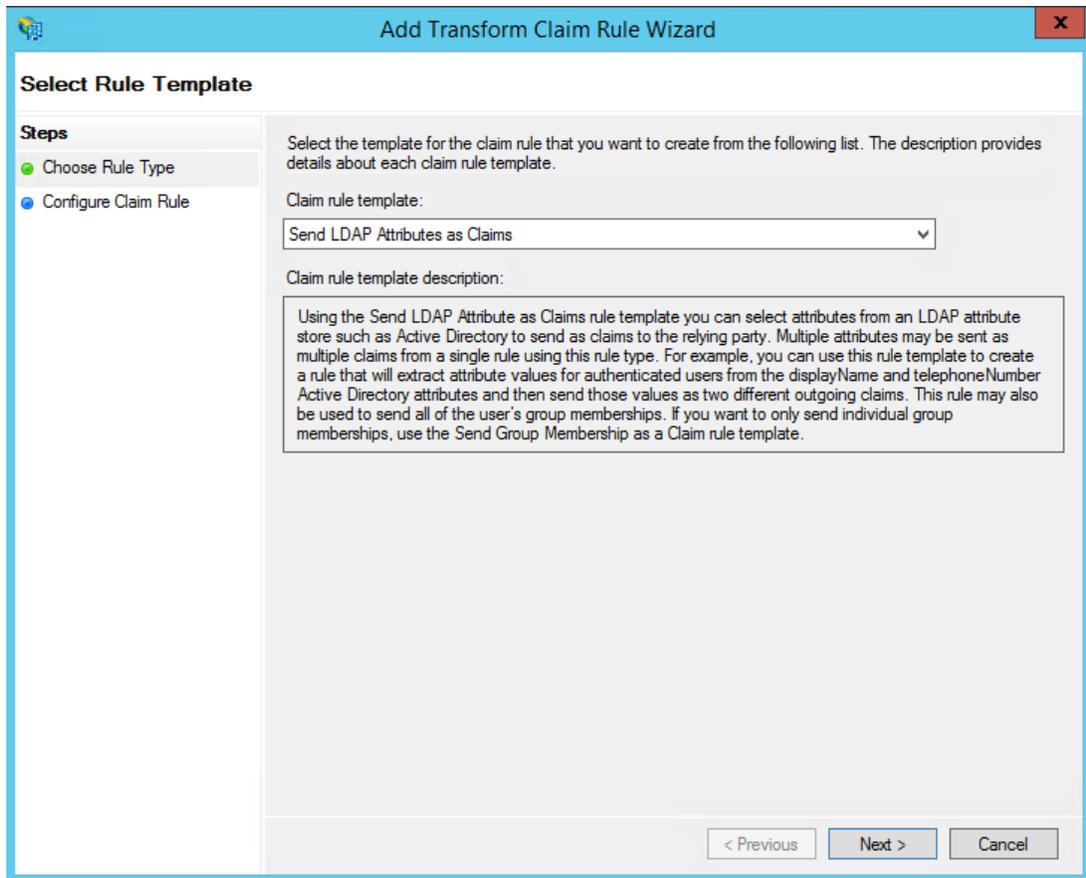


Step 2 - Creating claim rules

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:

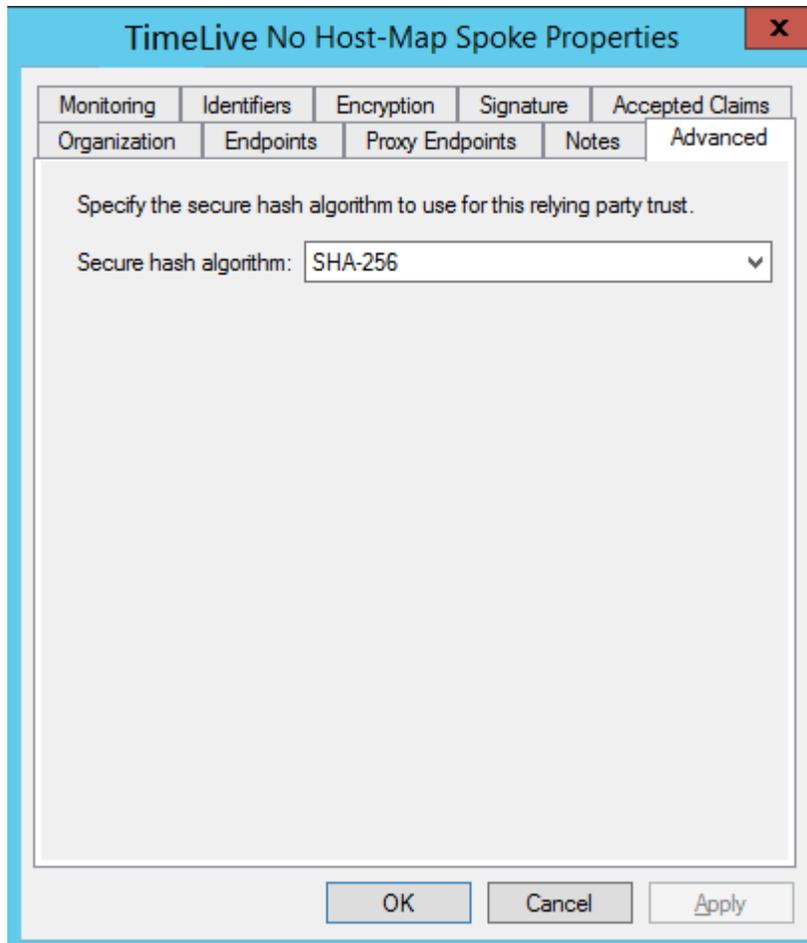
Rule template: Send LDAP Attributes as Claims

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
*		

- 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)

1. Properties

Member Of	Dial-in	Environment	Sessions
Remote control	Remote Desktop Services Profile		COM+
General	Address	Account	Profile
	Telephones	Organization	

1.

First name: Given-Name Initials: 1

Last name: Surname

Display name: Test

Description:

Office:

Telephone number: Other...

E-mail: Email Address

Web page: Other...

OK Cancel Apply Help

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:

Application Preference

Organization	General Preferences	Invoice Setup	Time Off Setup	Expense Setup	Timesheet Setup	Security
--------------	---------------------	---------------	----------------	---------------	-----------------	----------

Authentication Information

Enable Single sign-on (SSO):

SAML SSO URL: {SAML SSO URL}

Update Cancel

You need to provide SAML SSO URL Here. You should now have a working ADFS SSO implementation for your TimeLive.

LDAP Integration with TimeLive

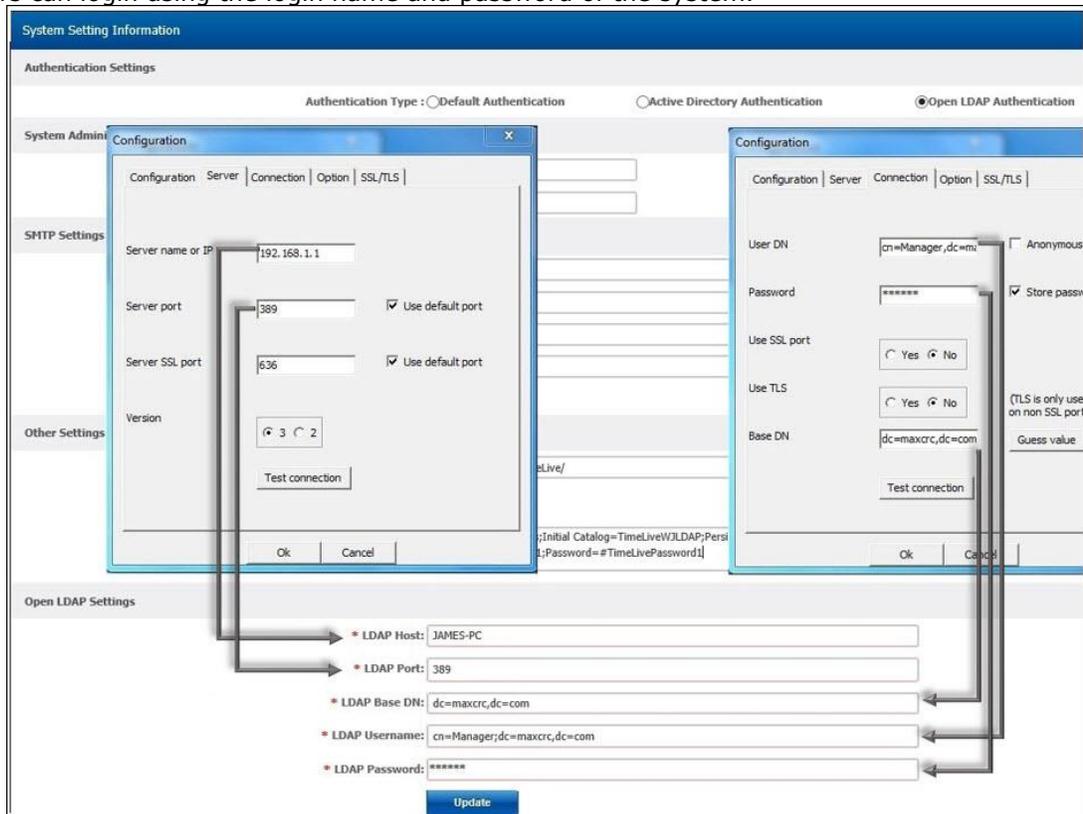
What is LDAP how to use it:

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

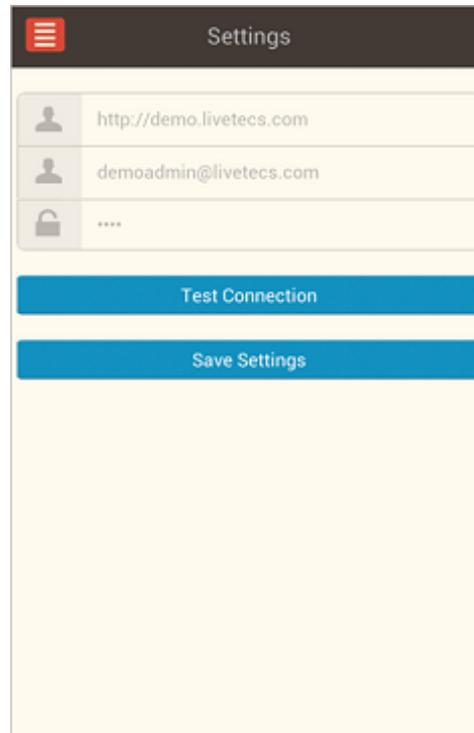
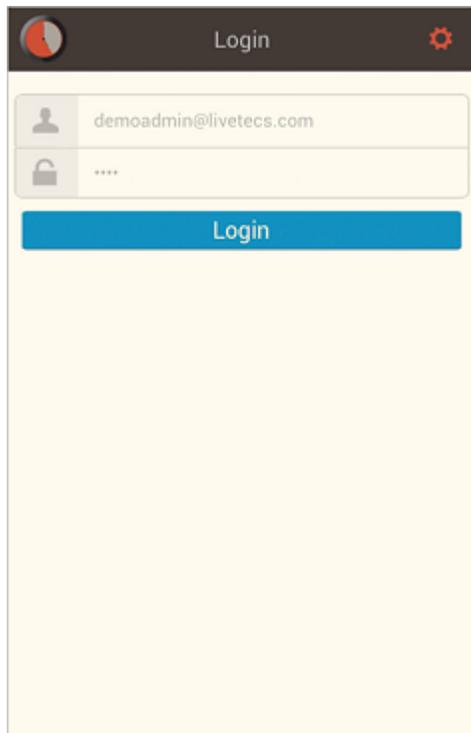
Capture your time against your clients, projects, and tasks while on the go.

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:

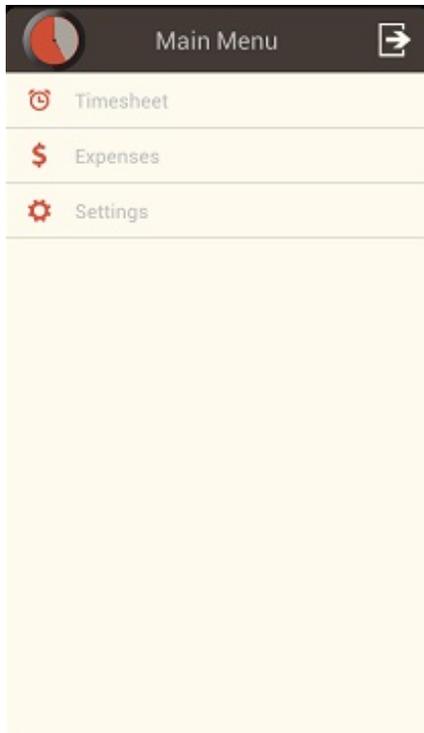
After the installation of TimeLive App on your mobile, please launch Mobile App and go to **Settings (ICON)** before attempting to login.



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.

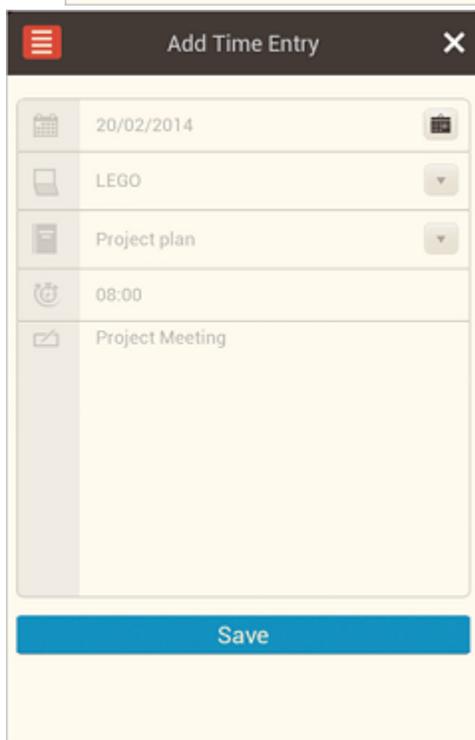
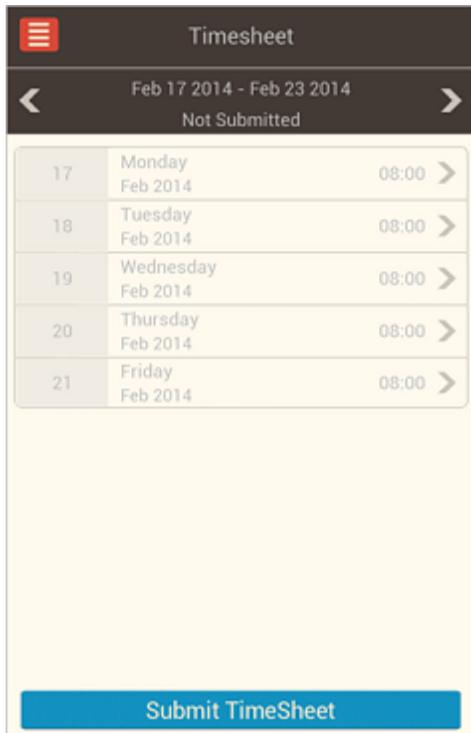
TimeLive Android App Entries:

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:

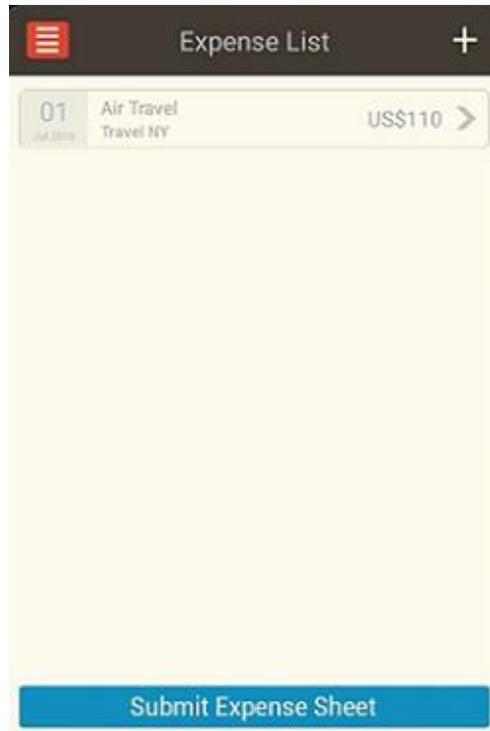
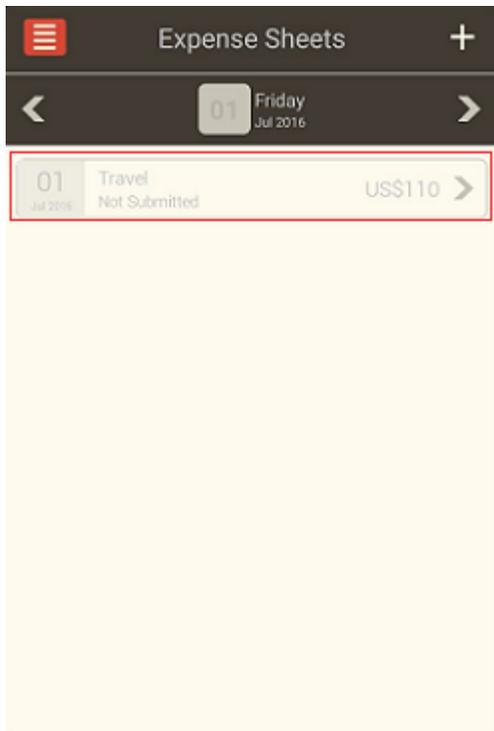
User can easily input & submit Expense entry from their mobiles.

The image displays two screenshots from a mobile application. The left screenshot shows the 'Expense Sheets' screen with 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 "**+**".

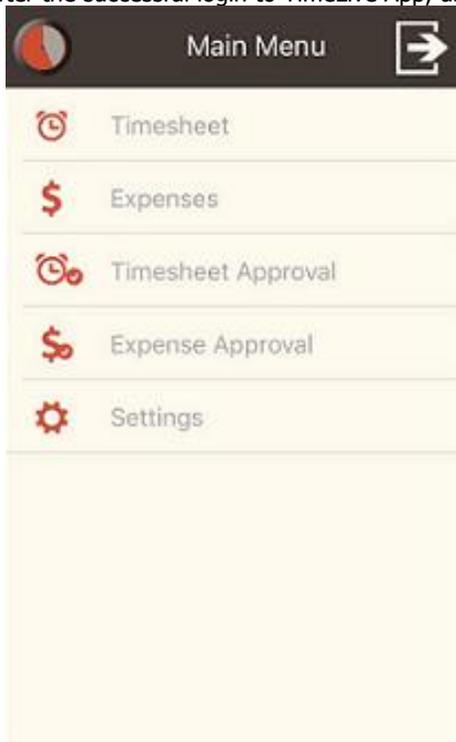
1. Select Project from first Drop-Down
2. Select Expense Type from 2nd Drop-Down
3. Fill the Expense Description
4. Select the Expense Date
5. Select the option of Reimburse and Billable
6. Select Mode of Payment from Drop-Down
7. Select Currency in which payment was made
8. Input Amount spent in the 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**.

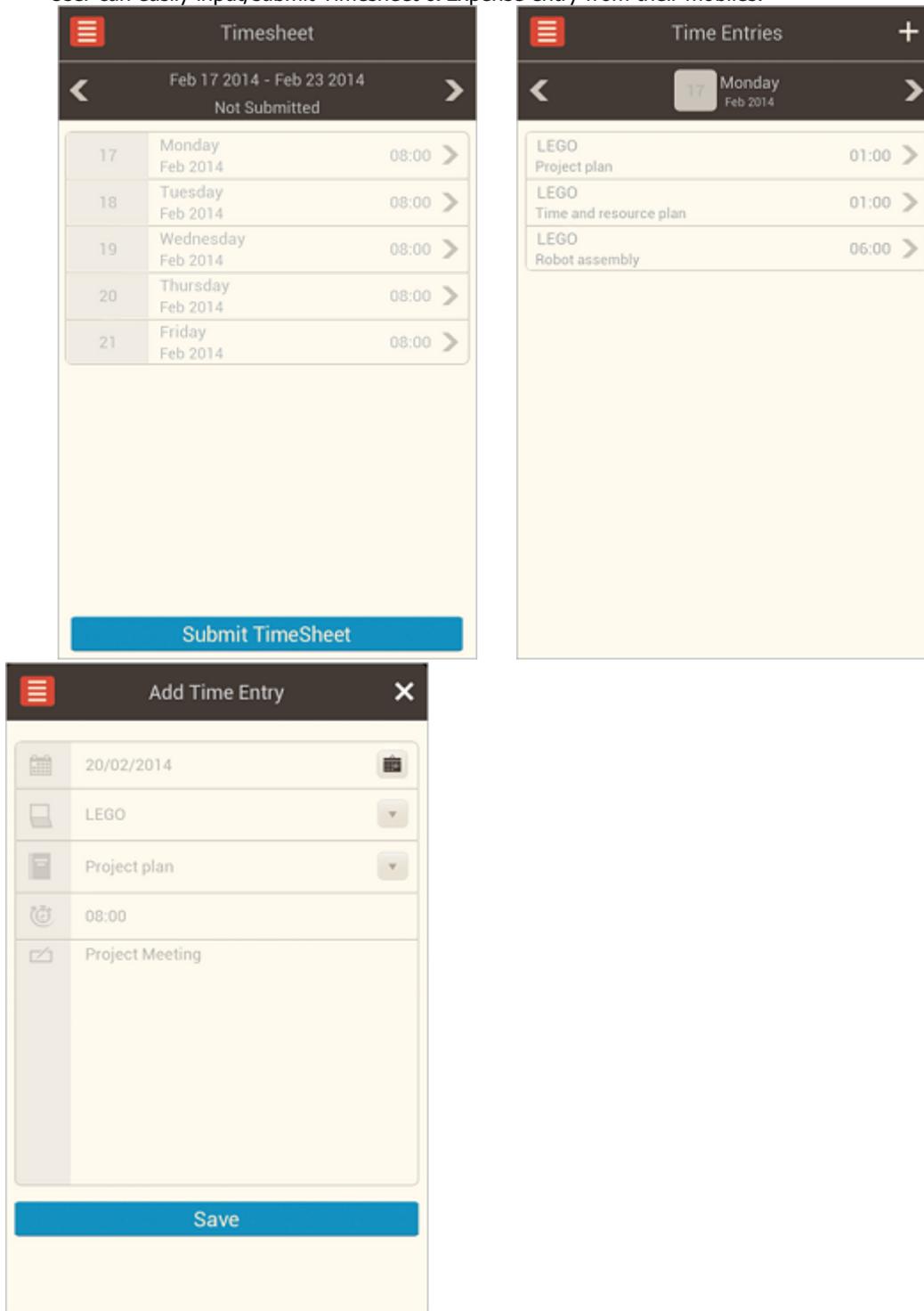


Timesheet Entries:

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:

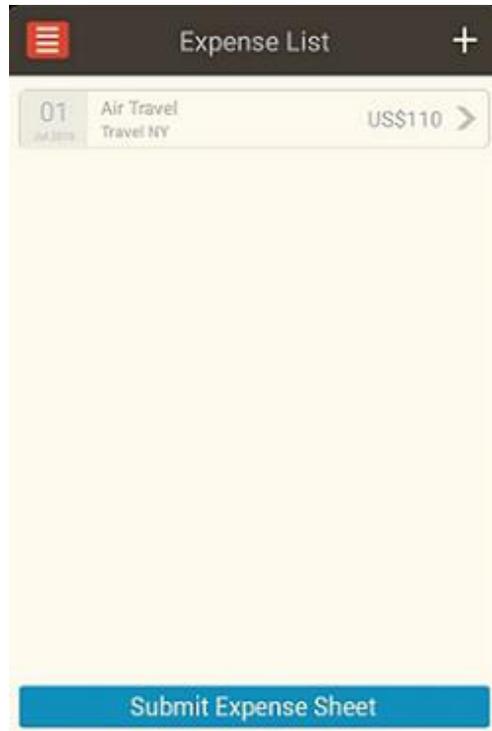
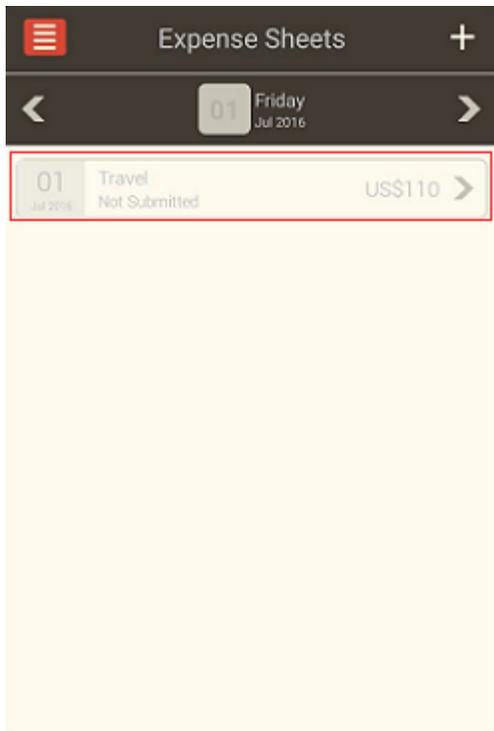
User can easily input & submit Expense entry from their mobiles.

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, Payment Mode (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

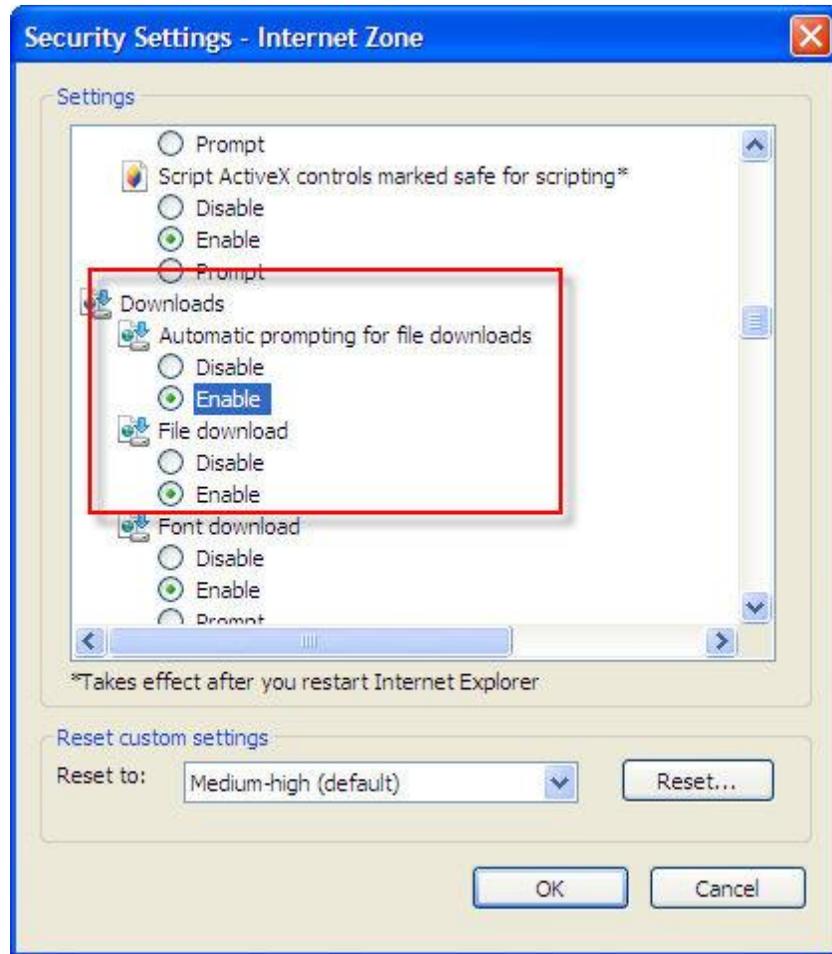
Refer to that application's documentation for information on how to disable pop-up blocking for a specific site.

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>