



## **ADMIN MODULES FOR VERSION 3.+**

**'Php Web Based Timesheet And Project Tracking Software'**


**By: Creative-Dr Sdn. Bhd.**

<b>1. ACCESSING ADMINISTRATION FEATURES.....</b>	<b>3</b>
1.1 ADMIN MODULES MENU .....	3
1.1.1 Add and Update User.....	4
1.1.1.1 Add and Update User's Permission Rules .....	5
1.1.1.2 Add and Update User's Timesheet Rules.....	5
1.1.1.3 Add and Update User's Timesheet Approval Rules .....	6
1.1.1.4 Add and Update User's Timeoff Rules.....	7
1.1.2 Add Multiple Users .....	8
1.1.2.1 Add and Update User's Permission Rules .....	9
1.1.2.2 Add and Update User's Timesheet Rules.....	9
1.1.2.3 Add and Update User's Timesheet Approval Rules .....	10
1.1.2.2 Add and Update User's Timeoff Rules.....	11
1.1.3 Email Admin and Template.....	12
1.1.3.1 Update Email Templates.....	13
1.1.4 Broadcast Email.....	14
1.1.5 List Clients .....	15
1.1.5.1 Add and Update Clients .....	16
1.1.6 List Currencies.....	17
1.1.6.1 Add and Update Currencies.....	18
1.1.7 List Departments.....	19
1.1.7.1 Add and Update Departments.....	20
1.1.8 List Employee Types .....	21
1.1.8.1 Add and Update Employee Type.....	22
1.1.9 List Expenses Types .....	23
1.1.9.1 Add and Update Expenses Type.....	24
1.1.10 List Phases .....	25
1.1.10.1 Add and Update Phases .....	26
1.1.11 List Roles.....	27
1.1.11.1 Add and Update Roles.....	28
1.1.12 List Submitted Timesheets .....	29
1.1.13 List Due Timesheets .....	30
1.1.14 List Overdue Timesheets .....	31
1.1.15 Timesheet Due and Overdue Email Reminder .....	32
1.1.16 List Timeoffs.....	33
1.1.16.1 Add and Update Timeoffs.....	34
1.1.17 List Users .....	35
1.1.17.1 Add and Update User's Personal Information.....	36
1.1.17.2 Add and Update User's Permissions .....	37
1.1.17.3 Add and Update User's Timesheet Settings.....	38
1.1.17.4 Add and Update User's Timesheet Approval Rules .....	39
1.1.17.5 Add and Update User's Timeoff Rules.....	40
1.1.18 Multiple Users Settings .....	41
1.1.19 Project Settings.....	42
1.1.20 Timesheet Settings.....	43

# 1. ACCESSING ADMINISTRATION FEATURES



Figure 1: Accessing Administrative Feature

Click “” tab at the top of the web page to access the Admin Module.

## 1.1 Admin Modules Menu

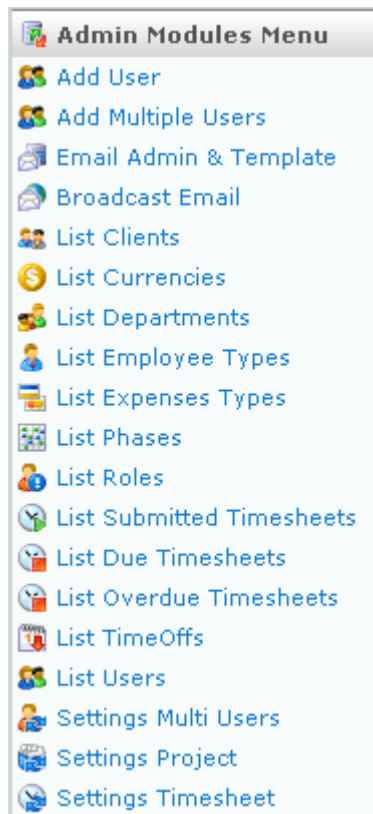
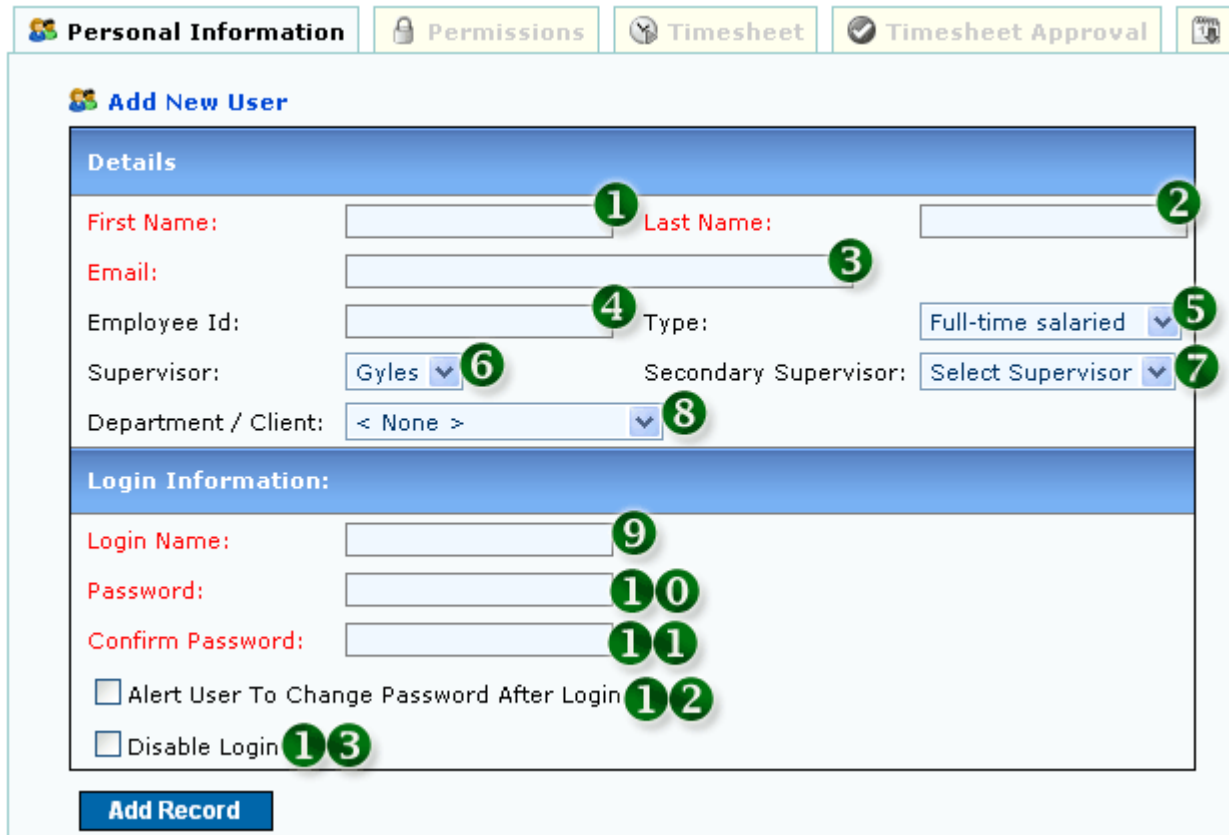


Figure 2: Admin Modules Menu

## 1.1.1 Add and Update User

 Add User

Click the " Personal Information" Tab to update User's Personal Information



The screenshot shows the 'Add New User' form with the following fields and callouts:


- Details Section:**
  - First Name:** (1)
  - Last Name:** (2)
  - Email:** (3)
  - Employee Id:** (4)
  - Type:** (5) - Dropdown menu with 'Full-time salaried' selected.
  - Supervisor:** (6) - Dropdown menu with 'Gyles' selected.
  - Secondary Supervisor:** (7) - Dropdown menu with 'Select Supervisor' selected.
  - Department / Client:** (8) - Dropdown menu with '< None >' selected.
- Login Information Section:**
  - Login Name:** (9)
  - Password:** (10)
  - Confirm Password:** (11)
  - ☐ **Alert User To Change Password After Login** (12)
  - ☐ **Disable Login** (13)

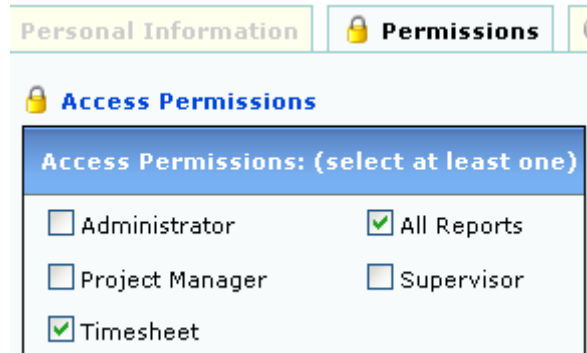
At the bottom of the form is a blue button labeled 'Add Record'.

Figure 3: Add New User

1. **FIRST NAME (MANDATORY)**
2. **LAST NAME (MANDATORY)**
3. **EMAIL ADDRESS (MANDATORY)**
4. **EMPLOYEE ID**
5. **EMPLOYEE TYPE**
6. **SUPERVISOR:** Listed for Users with Supervisor Permission only
7. **SECONDARY SUPERVISOR:** Listed for Users with Supervisor Permission only
8. **DEPARTMENT OR CLIENT**
9. **USER LOGIN (MANDATORY)**
10. **USER PASSWORD (MANDATORY)**
11. **PASSWORD CONFIRMATION (MANDATORY)**
12. **PASSWORD ALERT:** When checked, User will be prompted to Change Password after Login
13. **DISABLE LOGIN:** When checked, User cannot Login to System

### 1.1.1.1 Add and Update User's Permission Rules

Click the "  **Permissions** " Tab to update User's Permission




The screenshot shows the 'Permissions' tab selected in a user profile interface. Below the tab, there is a section titled 'Access Permissions: (select at least one)'. It contains five checkboxes arranged in two columns: 'Administrator', 'Project Manager', and 'Timesheet' on the left; 'All Reports' and 'Supervisor' on the right. The 'All Reports' and 'Timesheet' checkboxes are checked, while the others are unchecked.

Figure 4: User Permission

1. **ADMINISTRATOR:** Full Access and Permission to All Areas
2. **PROJECT MANAGER:** Permission to Create, Edit and Delete Projects and Tasks
3. **TIMESHEET:** Permission to Add and Update Timesheets (DEFAULT)
4. **ALL REPORTS:** Permission to Access All Reports (DEFAULT)
5. **SUPERVISOR:** Permission to become Supervisor to Users

### 1.1.1.2 Add and Update User's Timesheet Rules

Click the "  **Timesheet** " Tab to update User's Timesheet Settings




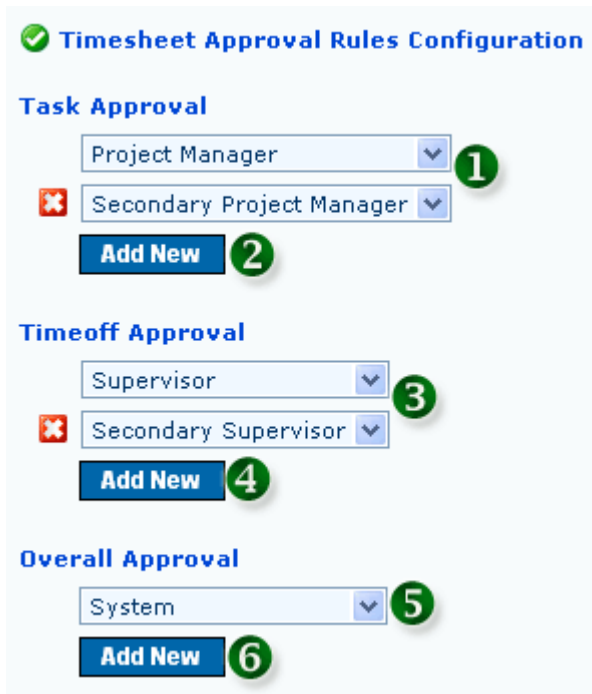
The screenshot shows the 'Timesheet' tab selected in a user profile interface. Below the tab, there is a section titled 'Timesheet Information:'. It contains several settings with numbered callouts (1-7):  
1. 'Hourly Cost:' with a dropdown set to 'USD' and a text box with '0.00'.  
2. 'Hours Per Day:' with a text box containing '8.00'.  
3. 'Hours Per Week:' with a text box containing '40.00'.  
4. 'Force Hours / Day?' with radio buttons for 'Yes' (selected) and 'No'.  
5. 'Force Hours / Week?' with radio buttons for 'Yes' (selected) and 'No'.  
6. 'Mandatory Timesheet?' with radio buttons for 'Yes' (selected) and 'No'.  
7. 'Activation Date:' with a date picker showing 'Dec 10 2006'.

Figure 5: User Timesheet Settings

1. **HOURLY COST:** Hourly Cost per Hour
2. **HOURS PER DAY:** Minimum Hours of Timesheet submission for one Working Day
3. **HOURS PER WEEK:** Minimum Hours of Timesheet submission for one week
4. **FORCE HOURS / DAY:** Mandatory for User to meet hours / day rule
5. **FORCE HOURS / WEEK:** Mandatory for User to meet hours / week rule
6. **MANDATORY TIMESHEET:** Mandatory for User to enter weekly Timesheet
7. **ACTIVATION DATE:** User needs to enter Timesheet starting this Date


### 1.1.1.3 Add and Update User's Timesheet Approval Rules



Click the "  **Timesheet Approval** " Tab to update User's Timesheet Approval Rules



**Timesheet Approval Rules Configuration**


**Task Approval**



Project Manager  **1**

 Secondary Project Manager 

**Add New** **2**


**Timeoff Approval**

Supervisor  **3**

 Secondary Supervisor 

**Add New** **4**

**Overall Approval**


System  **5**

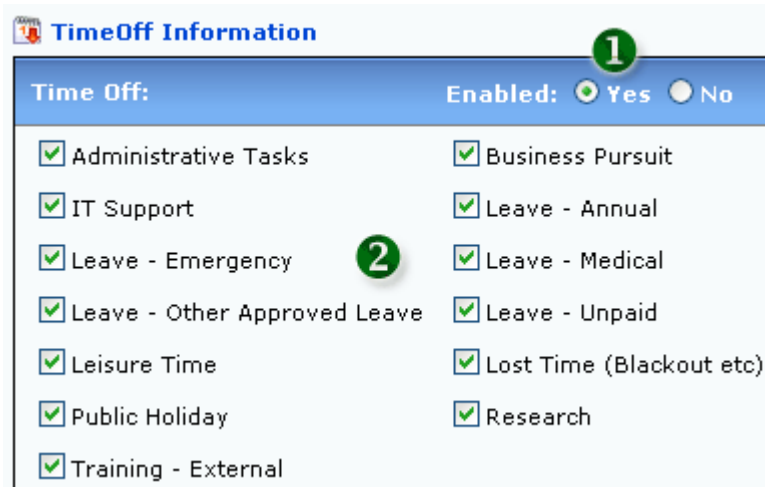
**Add New** **6**

Figure 6: Timesheet Approval Rules

1. **TASK APPROVAL DEFAULT RULES**
2. **ADD TASK APPROVAL RULE**
3. **TIMEOFF APPROVAL DEFAULT RULES**
4. **ADD TIMEOFF APPROVAL RULE**
5. **OVERALL APPROVAL DEFAULT RULE:** System Overall Approval will trigger after the Task and Timeoff approvals have been satisfied first
6. **ADD OVERALL APPROVAL RULE**

#### 1.1.1.4 Add and Update User's Timeoff Rules

Click the "  TimeOff " Tab to update User's Timeoff Rules




Time Off:	Enabled: <input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="checkbox"/> Administrative Tasks	<input checked="" type="checkbox"/> Business Pursuit
<input checked="" type="checkbox"/> IT Support	<input checked="" type="checkbox"/> Leave - Annual
<input checked="" type="checkbox"/> Leave - Emergency	<input checked="" type="checkbox"/> Leave - Medical
<input checked="" type="checkbox"/> Leave - Other Approved Leave	<input checked="" type="checkbox"/> Leave - Unpaid
<input checked="" type="checkbox"/> Leisure Time	<input checked="" type="checkbox"/> Lost Time (Blackout etc)
<input checked="" type="checkbox"/> Public Holiday	<input checked="" type="checkbox"/> Research
<input checked="" type="checkbox"/> Training - External	

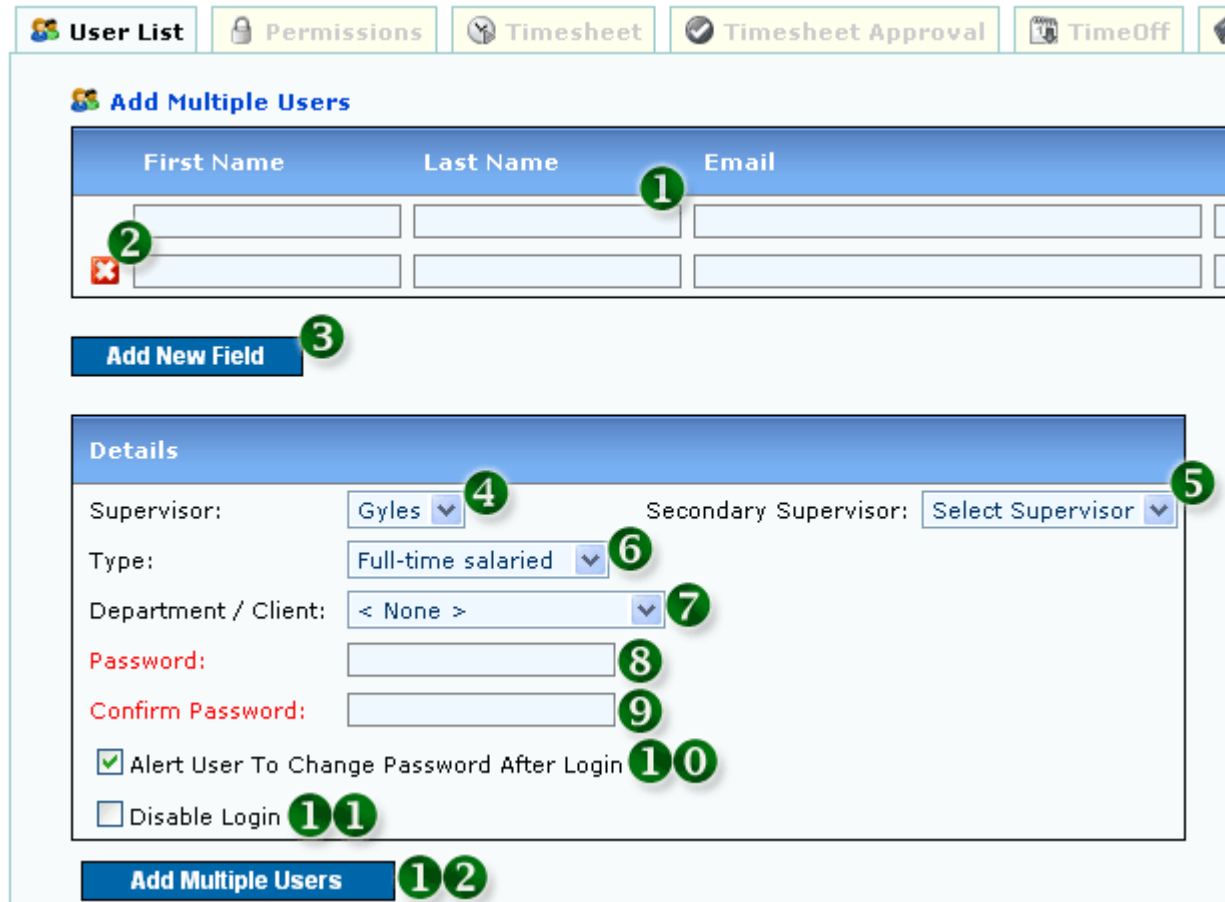
Figure 7: Timeoff Display Settings

1. ENABLE / DISABLE TIMEOFF OPTION IN TIMESHEET
2. SELECT TIMEOFF OPTIONS IN TIMESHEET

## 1.1.2 Add Multiple Users

 [Add Multiple Users](#)

Click the " User List" Tab to update User's Personal Information



The screenshot shows the 'Add Multiple Users' form. At the top, there are tabs: 'User List', 'Permissions', 'Timesheet', 'Timesheet Approval', and 'TimeOff'. The 'User List' tab is selected. Below the tabs, the form is titled 'Add Multiple Users'. It contains a table with columns 'First Name', 'Last Name', and 'Email'. Below the table is a button 'Add New Field'. Below that is a 'Details' section with fields for 'Supervisor', 'Secondary Supervisor', 'Type', 'Department / Client', 'Password', 'Confirm Password', 'Alert User To Change Password After Login', and 'Disable Login'. At the bottom is a button 'Add Multiple Users'. Numbered callouts (1-12) highlight the following elements:

- 1. First Name, Last Name, Email, and Login fields
- 2. Delete User button
- 3. Add New User button
- 4. Supervisor dropdown
- 5. Secondary Supervisor dropdown
- 6. Employee Type dropdown
- 7. Department or Client dropdown
- 8. User Password (Mandatory) field
- 9. Password Confirmation (Mandatory) field
- 10. Password Alert checkbox
- 11. Disable Login checkbox
- 12. Add Multiple Users button

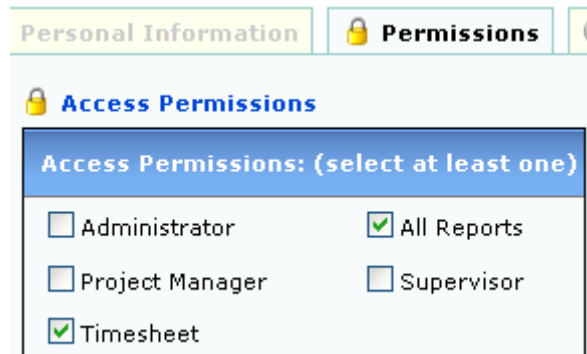
Figure 8: Add Multiple Users

1. **MANDATORY FIELDS:** First Name, Last Name, Email and Login
2. **DELETE USER**
3. **ADD NEW USER**
4. **SUPERVISOR:** Listed for Users with Supervisor Permission only
5. **SECONDARY SUPERVISOR:** Listed for Users with Supervisor Permission only
6. **EMPLOYEE TYPE**
7. **DEPARTMENT OR CLIENT**
8. **USER PASSWORD (MANDATORY)**
9. **PASSWORD CONFIRMATION (MANDATORY)**
10. **PASSWORD ALERT:** When checked, User will be prompted to Change Password after Login
11. **DISABLE LOGIN:** When checked, User cannot Login to System
12. **ADD MULTIPLE USERS**



### 1.1.2.1 Add and Update User's Permission Rules

Click the “ **Permissions**” Tab to update User's Permission




The screenshot shows the 'Permissions' tab selected in a user profile interface. Below the tab, there is a section titled 'Access Permissions' with a sub-header 'Access Permissions: (select at least one)'. This section contains five checkboxes arranged in two columns: 'Administrator', 'Project Manager', and 'Timesheet' on the left; 'All Reports' and 'Supervisor' on the right. The 'All Reports' and 'Timesheet' checkboxes are checked, while the others are unchecked.

Figure 9: User Permission

1. **ADMINISTRATOR:** Full Access and Permission to All Areas
2. **PROJECT MANAGER:** Permission to Create, Edit and Delete Projects and Tasks
3. **TIMESHEET:** Permission to Add and Update Timesheets (DEFAULT)
4. **ALL REPORTS:** Permission to Access All Reports (DEFAULT)
5. **SUPERVISOR:** Permission to become Supervisor to Users

### 1.1.2.2 Add and Update User's Timesheet Rules

Click the “ **Timesheet**” Tab to update User's Timesheet Settings




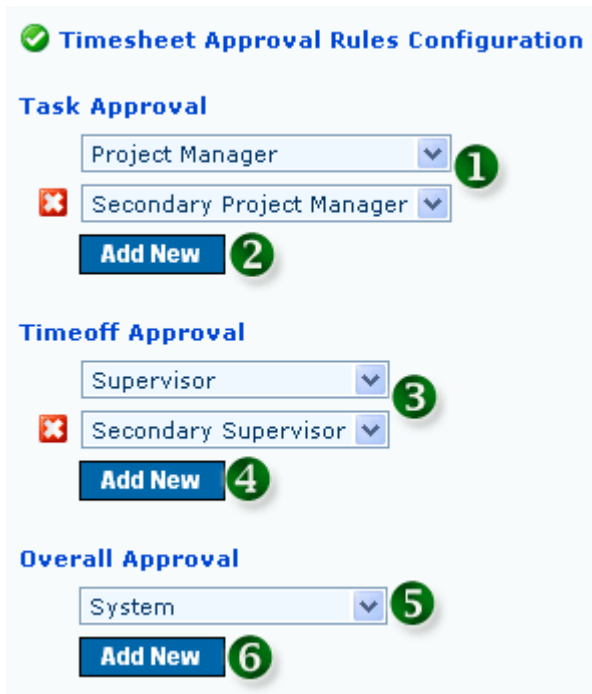
The screenshot shows the 'Timesheet' tab selected in a user profile interface. Below the tab, there is a section titled 'Timesheet Information'. This section contains several fields and options, each numbered 1 through 7 for reference: 1. 'Hourly Cost' with a dropdown set to 'USD' and a text box with '0.00'. 2. 'Hours Per Day' with a text box containing '8.00'. 3. 'Hours Per Week' with a text box containing '40.00'. 4. 'Force Hours / Day?' with radio buttons for 'Yes' (selected) and 'No'. 5. 'Force Hours / Week?' with radio buttons for 'Yes' (selected) and 'No'. 6. 'Mandatory Timesheet?' with radio buttons for 'Yes' (selected) and 'No'. 7. 'Activation Date' with a date picker showing 'Dec 10 2006'.

Figure 10: User Timesheet Settings

1. **HOURLY COST:** Hourly Cost per Hour
2. **HOURS PER DAY:** Minimum Hours of Timesheet submission for one Working Day
3. **HOURS PER WEEK:** Minimum Hours of Timesheet submission for one week
4. **FORCE HOURS / DAY:** Mandatory for User to meet hours / day rule
5. **FORCE HOURS / WEEK:** Mandatory for User to meet hours / week rule
6. **MANDATORY TIMESHEET:** Mandatory for User to enter weekly Timesheet
7. **ACTIVATION DATE:** User needs to enter Timesheet starting this Date


### 1.1.2.3 Add and Update User's Timesheet Approval Rules



Click the "  **Timesheet Approval** " Tab to update User's Timesheet Approval Rules



**Timesheet Approval Rules Configuration**


**Task Approval**



Project Manager  **1**

 Secondary Project Manager 

**Add New** **2**


**Timeoff Approval**

Supervisor  **3**

 Secondary Supervisor 

**Add New** **4**

**Overall Approval**


System  **5**

**Add New** **6**

Figure 11: Timesheet Approval Rules

1. **TASK APPROVAL DEFAULT RULES**
2. **ADD TASK APPROVAL RULE**
3. **TIMEOFF APPROVAL DEFAULT RULES**
4. **ADD TIMEOFF APPROVAL RULE**
5. **OVERALL APPROVAL DEFAULT RULE:** System Overall Approval will trigger after the Task and Timeoff approvals have been satisfied first
6. **ADD OVERALL APPROVAL RULE**

### 1.1.2.2 Add and Update User's Timeoff Rules

Click the "  TimeOff " Tab to update User's Timeoff Rules



Time Off:	Enabled: <input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="checkbox"/> Administrative Tasks	<input checked="" type="checkbox"/> Business Pursuit
<input checked="" type="checkbox"/> IT Support	<input checked="" type="checkbox"/> Leave - Annual
<input checked="" type="checkbox"/> Leave - Emergency	<input checked="" type="checkbox"/> Leave - Medical
<input checked="" type="checkbox"/> Leave - Other Approved Leave	<input checked="" type="checkbox"/> Leave - Unpaid
<input checked="" type="checkbox"/> Leisure Time	<input checked="" type="checkbox"/> Lost Time (Blackout etc)
<input checked="" type="checkbox"/> Public Holiday	<input checked="" type="checkbox"/> Research
<input checked="" type="checkbox"/> Training - External	

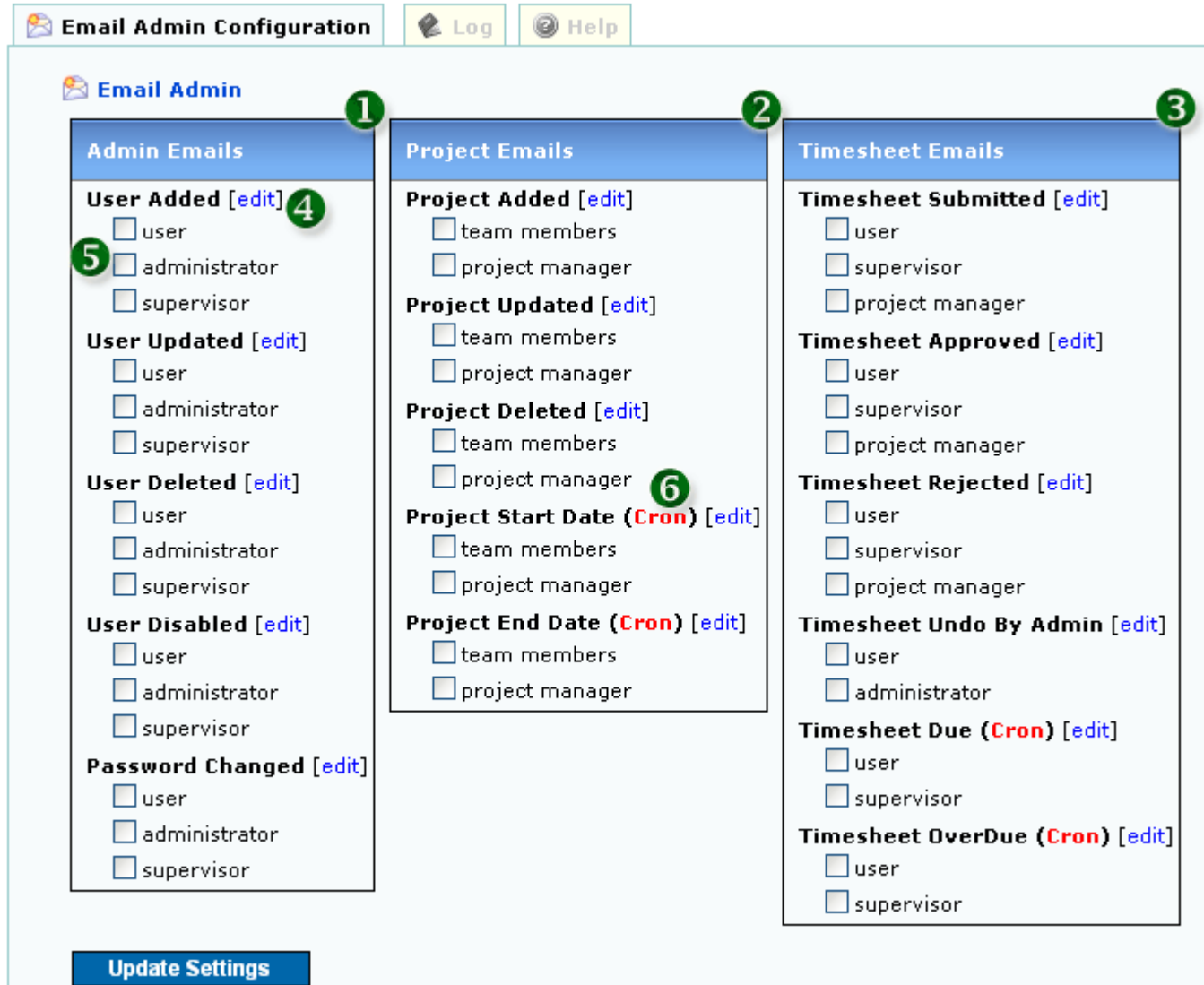
Figure 12: Timeoff Display Settings

1. ENABLE / DISABLE TIMEOFF OPTION IN TIMESHEET
2. SELECT TIMEOFF OPTIONS IN TIMESHEET

### 1.1.3 Email Admin and Template

#### Email Admin & Template

Click the “ Email Admin Configuration” Tab to update Templates and Email Admin



**Email Admin Configuration** **Log** **Help**

**Email Admin**

**Admin Emails**

**User Added** [edit]

☐ user

☐ administrator

☐ supervisor

**User Updated** [edit]

☐ user

☐ administrator

☐ supervisor

**User Deleted** [edit]

☐ user

☐ administrator

☐ supervisor

**User Disabled** [edit]

☐ user

☐ administrator

☐ supervisor

**Password Changed** [edit]

☐ user

☐ administrator

☐ supervisor

**Project Emails**

**Project Added** [edit]

☐ team members

☐ project manager

**Project Updated** [edit]

☐ team members

☐ project manager

**Project Deleted** [edit]

☐ team members

☐ project manager

**Project Start Date (Cron)** [edit]

☐ team members

☐ project manager

**Project End Date (Cron)** [edit]

☐ team members

☐ project manager

**Timesheet Emails**

**Timesheet Submitted** [edit]

☐ user

☐ supervisor

☐ project manager

**Timesheet Approved** [edit]

☐ user

☐ supervisor

☐ project manager

**Timesheet Rejected** [edit]

☐ user

☐ supervisor

☐ project manager

**Timesheet Undo By Admin** [edit]

☐ user

☐ administrator

**Timesheet Due (Cron)** [edit]

☐ user

☐ supervisor

**Timesheet OverDue (Cron)** [edit]

☐ user

☐ supervisor

**Update Settings**

Figure 13: Email Admin and Template

1. **ADMIN RELATED EMAILS:** Emails related to Admin Activities listed here
2. **PROJECT RELATED EMAILS:** Emails related to Project Activities listed here
3. **TIMESHEET RELATED EMAILS:** Emails related to Timesheet Activities listed here
4. **EDIT TEMPLATE VIA TEMPLATE EDITOR:** Change the default template to your requirements via Template Editor

5. **CHECK TO ENABLE EMAIL SENDING:** Enable the Email Sending feature for this activity
6. **CRON BASED AUTOMATED EMAIL SENDING:** For Linux/Unix/FreeBSD Cron Based Email. Refer Admin System-Execute Cron Files

### 1.1.3.1 Update Email Templates

Click the "[Edit]" Link to Update Email Templates via Template Editor


The screenshot shows the 'Email Template Configuration' page. The main section is titled 'Current Email Template' and contains a form for editing the 'Add New User Notification' template. The form has four main sections: 'From:' with a text field containing '[Admin Name]' (marked with a green circle 1), 'Sender Address:' with a text field containing '[Admin Email]' (marked with a green circle 2), 'Subject:' with a text field containing '[User Name] has been added to Socket Timesheet' (marked with a green circle 3), and 'Content:' with a text area containing 'Hi [User Name],  
You have been successfully added to the Socket Timesheet system.  
Login: [Login]' (marked with a green circle 4). Below the content field is a 'Parser Description' section (marked with a green circle 5) which lists the following variables: [Admin Name] = Current Administrator's Name, [Admin Email] = Current Administrator's Email, [User Name] = Affected User's Name, [Login] = Login Name, and [Password] = Password. At the bottom of the form is a blue 'Update Template' button.

Figure 14: Email Template Editor

1. **EMAIL FROM**
2. **SENDER EMAIL ADDRESS**
3. **EMAIL SUBJECT**
4. **EMAIL CONTENT**
5. **PARSER DESCRIPTION:** Items inside the tag [xxxxxxx] will be replaced as per the Parser Description

## 1.1.4 Broadcast Email



Click the “ Message Configuration” Tab to Broadcast Email Messages to selected Users

**Message Configuration** **Log** **Help**

**Broadcast Message**

**Details**

**From:** Gyles 1

**Sender Address:** gyles@sockettimesheet.com 2

**Recipients:**

**Selected** **Available**

[All Users] David Gyles 3

**Limit Email Messages:** 5 recipients/message (lower for slower server) 4

**Subject:** Welcome to Socket Timesheet 3.0 5

**Content:** This is a new version of Socket Timesheet. AJAX is the main technology 6

**Send Message**

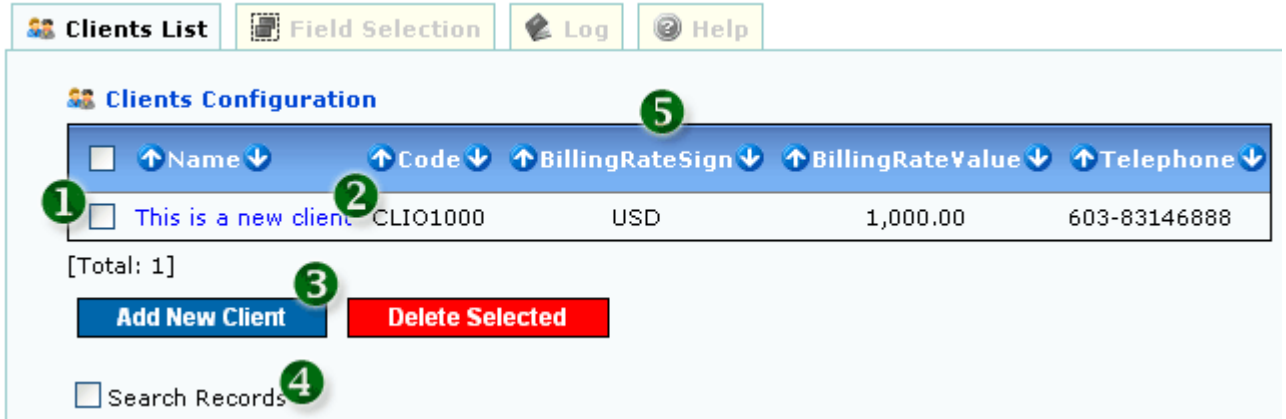
Figure 15: Broadcast Email

1. **EMAIL FROM**
2. **EMAIL SENDER ADDRESS**
3. **EMAIL RECIPIENTS:** Selected Users or All Users
4. **LIMIT MESSAGES:** Some email servers cannot send a large amount of emails in one go. This feature will limit the email sending cycle
5. **EMAIL SUBJECT**
6. **EMAIL CONTENT**

## 1.1.5 List Clients

 List Clients

Click the " Clients List" Tab to List Clients



The screenshot shows the 'List Clients' interface. At the top, there are four tabs: 'Clients List' (selected), 'Field Selection', 'Log', and 'Help'. Below the tabs is the 'Clients Configuration' section. It features a table with columns: Name, Code, BillingRateSign, BillingRateValue, and Telephone. The first row contains a checkbox (labeled 1), the text 'This is a new client' (labeled 2), 'CLIO1000', 'USD', '1,000.00', and '603-83146888'. Below the table, there is a '[Total: 1]' label, two buttons: 'Add New Client' (labeled 3) and 'Delete Selected' (labeled 1), and a checkbox labeled 'Search Records' (labeled 4). The table header is labeled 5.

<input type="checkbox"/>	Name	Code	BillingRateSign	BillingRateValue	Telephone
<input type="checkbox"/>	This is a new client	CLIO1000	USD	1,000.00	603-83146888

[Total: 1]

☐ Search Records

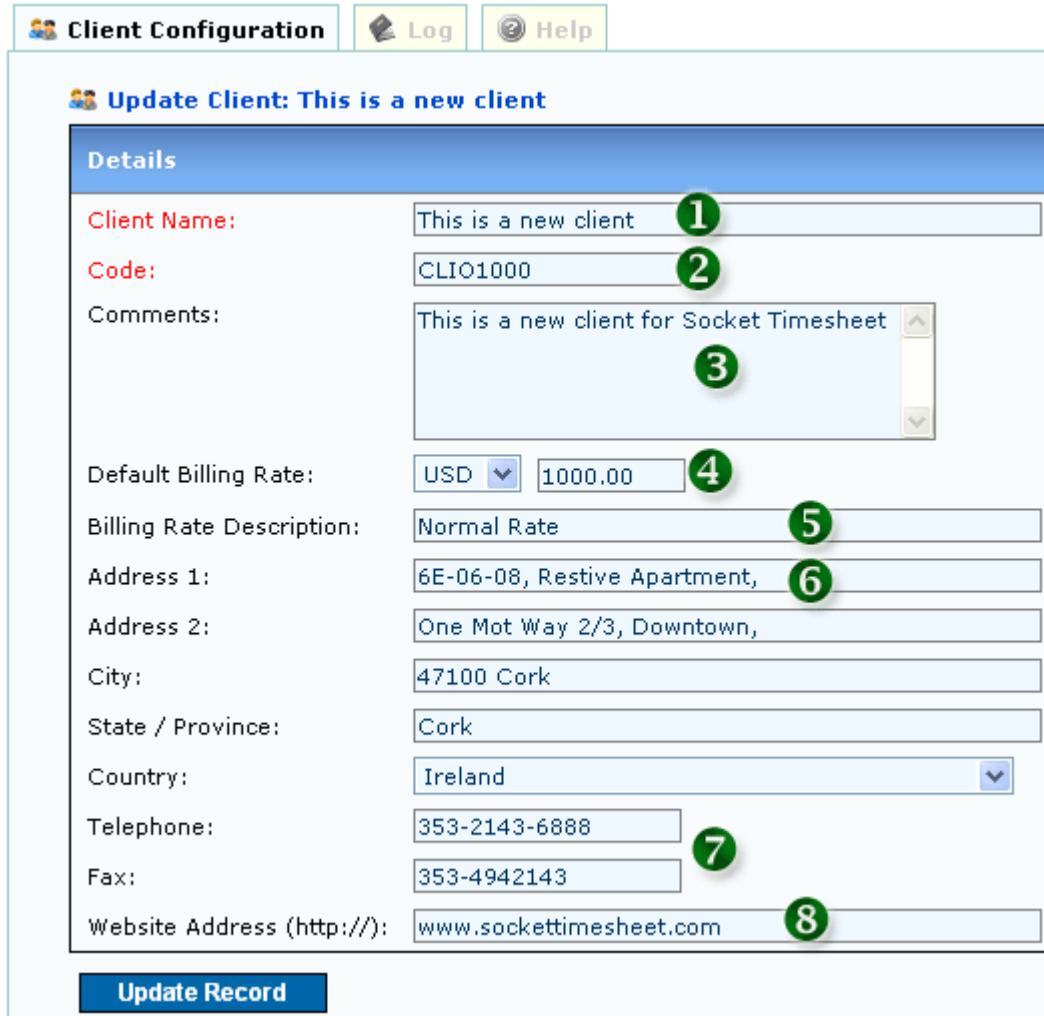
**Add New Client** **Delete Selected**

Figure 16: List Clients

1. CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD
2. CLICK LINK TO GO TO EDIT MODE
3. CLICK TO ADD NEW RECORD
4. CHECK TO SEARCH RECORDS
5. SORTABLE FIELDS

### 1.1.5.1 Add and Update Clients

Click the “ Client Configuration” Tab to List Clients



**Client Configuration** **Log** **Help**

**Update Client: This is a new client**

**Details**

**Client Name:** This is a new client **1**

**Code:** CLIO1000 **2**

**Comments:** This is a new client for Socket Timesheet **3**

**Default Billing Rate:** USD **1000.00** **4**

**Billing Rate Description:** Normal Rate **5**

**Address 1:** 6E-06-08, Restive Apartment, **6**

**Address 2:** One Mot Way 2/3, Downtown,

**City:** 47100 Cork

**State / Province:** Cork

**Country:** Ireland

**Telephone:** 353-2143-6888 **7**

**Fax:** 353-4942143

**Website Address (http://):** www.sockettimesheet.com **8**

**Update Record**

Figure 17: Add and Update Clients

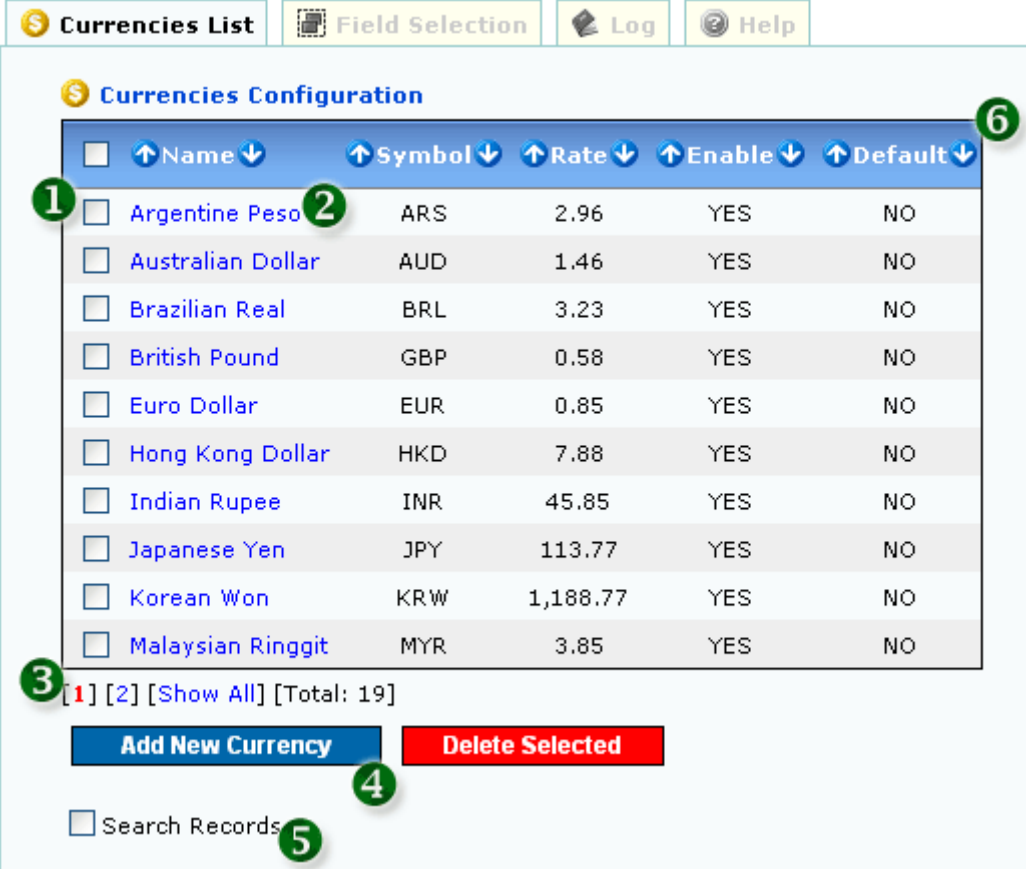
1. CLIENT NAME (MANDATORY)
2. CLIENT CODE (MANDATORY)
3. COMMENTS OR DESCRIPTION
4. CLIENT BILLING RATE PER HOUR
5. BILLING RATE DESCRIPTION
6. CLIENT ADDRESS
7. TELEPHONE AND FAX
8. CLIENT WEBSITE



## 1.1.6 List Currencies

### List Currencies

Click the " Currencies List" Tab to List Currencies



The screenshot shows the "Currencies List" interface. At the top, there are tabs: "Currencies List" (selected), "Field Selection", "Log", and "Help". Below the tabs is the "Currencies Configuration" section. It contains a table with columns: Name, Symbol, Rate, Enable, and Default. The table lists various currencies like Argentine Peso, Australian Dollar, etc. Below the table are buttons for "Add New Currency" and "Delete Selected", and a "Search Records" checkbox. Numbered callouts 1 through 6 point to specific elements: 1 points to the "Delete Selected" button, 2 points to the "Argentine Peso" link, 3 points to the pagination controls, 4 points to the "Add New Currency" button, 5 points to the "Search Records" checkbox, and 6 points to the table headers.

<input type="checkbox"/>	↑ Name ↓	↑ Symbol ↓	↑ Rate ↓	↑ Enable ↓	↑ Default ↓
<input type="checkbox"/>	<a href="#">Argentine Peso</a>	ARS	2.96	YES	NO
<input type="checkbox"/>	<a href="#">Australian Dollar</a>	AUD	1.46	YES	NO
<input type="checkbox"/>	<a href="#">Brazilian Real</a>	BRL	3.23	YES	NO
<input type="checkbox"/>	<a href="#">British Pound</a>	GBP	0.58	YES	NO
<input type="checkbox"/>	<a href="#">Euro Dollar</a>	EUR	0.85	YES	NO
<input type="checkbox"/>	<a href="#">Hong Kong Dollar</a>	HKD	7.88	YES	NO
<input type="checkbox"/>	<a href="#">Indian Rupee</a>	INR	45.85	YES	NO
<input type="checkbox"/>	<a href="#">Japanese Yen</a>	JPY	113.77	YES	NO
<input type="checkbox"/>	<a href="#">Korean Won</a>	KRW	1,188.77	YES	NO
<input type="checkbox"/>	<a href="#">Malaysian Ringgit</a>	MYR	3.85	YES	NO

[1] [2] [Show All] [Total: 19]

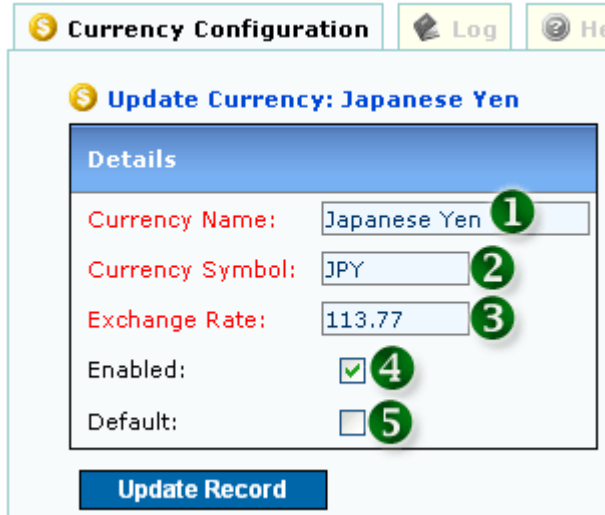
☐ Search Records

Figure 18: Currencies Listing

1. CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD
2. CLICK LINK TO GO TO EDIT MODE
3. LISTING MAX PAGE: Configurable in the User Preference section
4. CLICK TO ADD NEW RECORD
5. CHECK TO SEARCH RECORDS
6. SORTABLE FIELDS

### 1.1.6.1 Add and Update Currencies

Click the “ Currency Configuration” Tab to Edit Currencies



**Currency Configuration** Log Help

**Update Currency: Japanese Yen**

**Details**

Currency Name: Japanese Yen 1

Currency Symbol: JPY 2

Exchange Rate: 113.77 3

Enabled: ☒ 4

Default: ☐ 5

**Update Record**

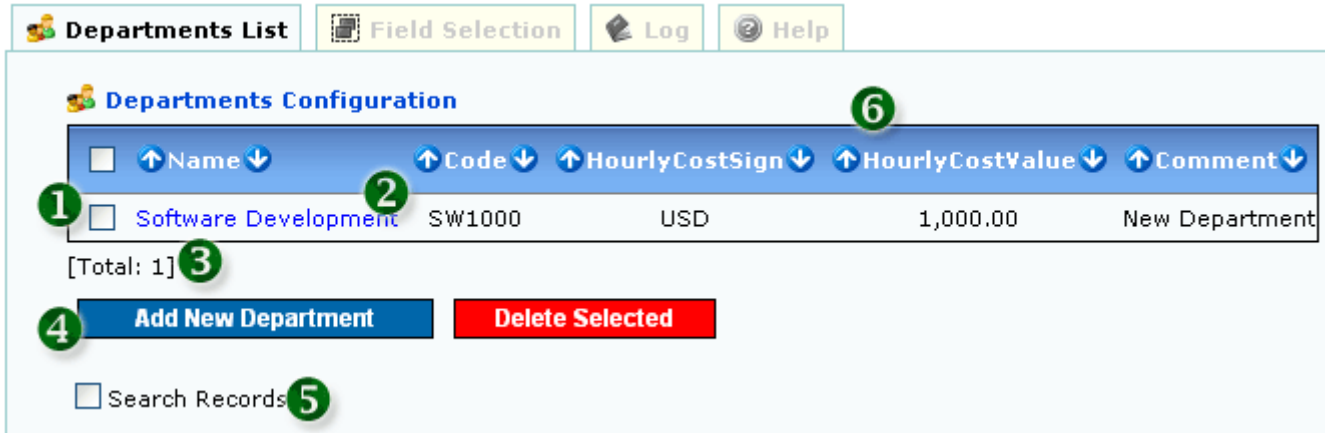
Figure 19: Adding and Updating Currencies

1. **CURRENCY NAME (MANDATORY & UNIQUE)**
2. **CURRENCY SYMBOL (MANDATORY & UNIQUE)**
3. **EXCHANGE RATE (MANDATORY):** The Exchange Rate against Default Currency in System
4. **ENABLE THIS CURRENCY FOR SELECTION IN SYSTEM**
5. **MAKE THIS CURRENCY A DEFAULT CURRENCY:** The other Currencies in the System will change their Exchange Rate against this Currency automatically

## 1.1.7 List Departments

 List Departments

Click the " Departments List" Tab to List Departments



The screenshot shows the 'Departments List' interface. At the top, there are tabs: 'Departments List' (active), 'Field Selection', 'Log', and 'Help'. Below the tabs is the 'Departments Configuration' section. It contains a table with columns: Name, Code, HourlyCostSign, HourlyCostValue, and Comment. The first row is 'Software Development' with code 'SW1000', sign 'USD', value '1,000.00', and comment 'New Department'. Below the table is a summary row '[Total: 1]'. At the bottom, there are two buttons: 'Add New Department' and 'Delete Selected'. There is also a checkbox labeled 'Search Records'.

<input type="checkbox"/>	Name	Code	HourlyCostSign	HourlyCostValue	Comment
<input type="checkbox"/>	Software Development	SW1000	USD	1,000.00	New Department
[Total: 1]					

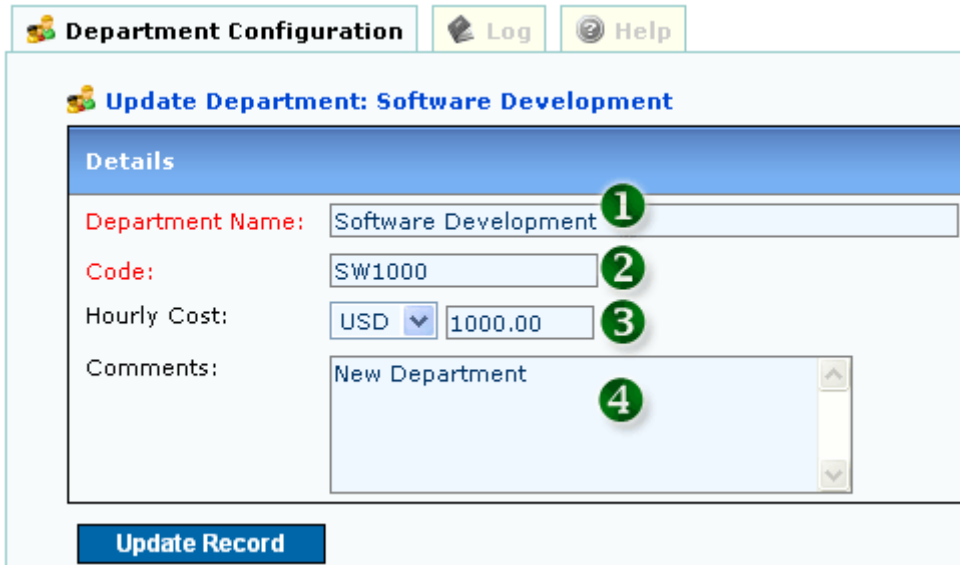
☐ Search Records

Figure 20: List Departments

1. CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD
2. CLICK LINK TO GO TO EDIT MODE
3. LISTING MAX PAGE: Configurable in the User Preference section
4. CLICK TO ADD NEW RECORD
5. CHECK TO SEARCH RECORDS
6. SORTABLE FIELDS

### 1.1.7.1 Add and Update Departments

Click the “ Department Configuration” Tab to Edit Departments



**Department Configuration** **Log** **Help**

**Update Department: Software Development**

**Details**

Department Name: Software Development 1

Code: SW1000 2

Hourly Cost: USD 1000.00 3

Comments: New Department 4

**Update Record**

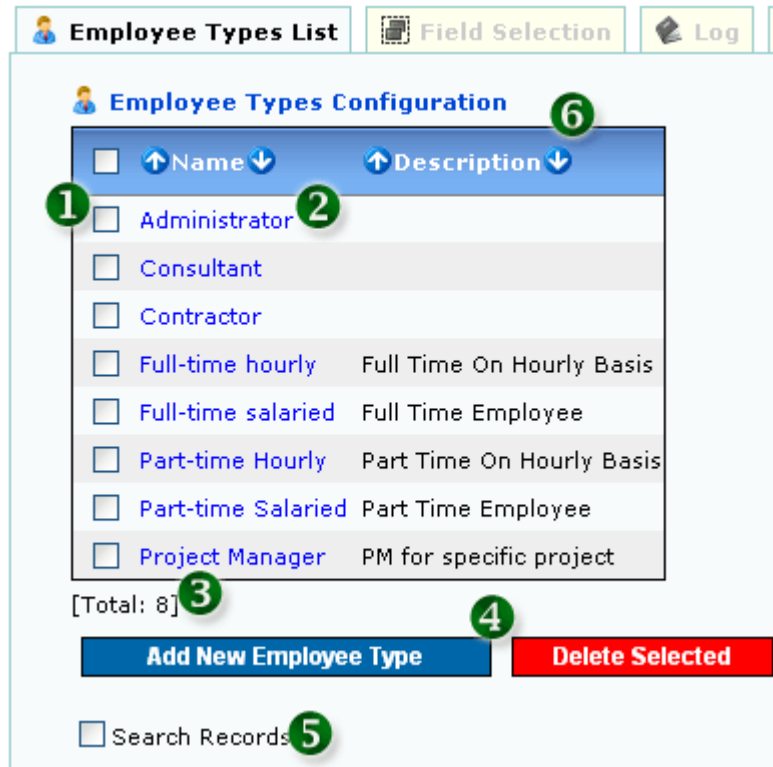
Figure 21: Edit Departments

1. DEPARTMENT NAME (MANDATORY)
2. DEPARTMENT CODE (MANDATORY)
3. COST PER HOUR: Department Cost Per Hour Charged in Timesheet
4. COMMENTS OR DESCRIPTION

## 1.1.8 List Employee Types

 List Employee Types

Click the " Employee Types List" Tab to List Employee Types



The screenshot shows the 'Employee Types List' interface. At the top, there are tabs: 'Employee Types List' (active), 'Field Selection', and 'Log'. Below the tabs is the 'Employee Types Configuration' section. It contains a table with columns 'Name' and 'Description'. The table lists eight employee types: Administrator, Consultant, Contractor, Full-time hourly, Full-time salaried, Part-time Hourly, Part-time Salaried, and Project Manager. Each row has a checkbox on the left. Below the table, there is a '[Total: 8]' label, a 'Search Records' checkbox, and two buttons: 'Add New Employee Type' and 'Delete Selected'. Numbered callouts are placed as follows: 1 points to the checkbox for 'Administrator'; 2 points to the 'Administrator' text; 3 points to the '[Total: 8]' label; 4 points to the 'Add New Employee Type' button; 5 points to the 'Search Records' checkbox; and 6 points to the 'Name' and 'Description' column headers.

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Administrator	
<input type="checkbox"/>	Consultant	
<input type="checkbox"/>	Contractor	
<input type="checkbox"/>	Full-time hourly	Full Time On Hourly Basis
<input type="checkbox"/>	Full-time salaried	Full Time Employee
<input type="checkbox"/>	Part-time Hourly	Part Time On Hourly Basis
<input type="checkbox"/>	Part-time Salaried	Part Time Employee
<input type="checkbox"/>	Project Manager	PM for specific project

[Total: 8]

☐ Search Records

**Add New Employee Type** **Delete Selected**

Figure 22: List Employee Types

1. CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD
2. CLICK LINK TO GO TO EDIT MODE
3. LISTING MAX PAGE: Configurable in the User Preference section
4. CLICK TO ADD NEW RECORD
5. CHECK TO SEARCH RECORDS
6. SORTABLE FIELDS

### 1.1.8.1 Add and Update Employee Type

Click the “ Employee Type Configuration” Tab to Edit Employee Type



The screenshot shows a web application interface for 'Employee Type Configuration'. At the top, there is a navigation bar with a tab labeled 'Employee Type Configuration' (with a person icon), and two buttons: 'Log' and 'Help'. Below the navigation bar, the main content area has a header 'Update Employee Type: Full-time hourly' (with a person icon). The main form is titled 'Details' and contains two fields: 'Employee Type' with the value 'Full-time hourly' (marked with a green circle '1') and 'Description' with the value 'Full Time On Hourly Basis' (marked with a green circle '2'). Below the form is a blue button labeled 'Update Record'.

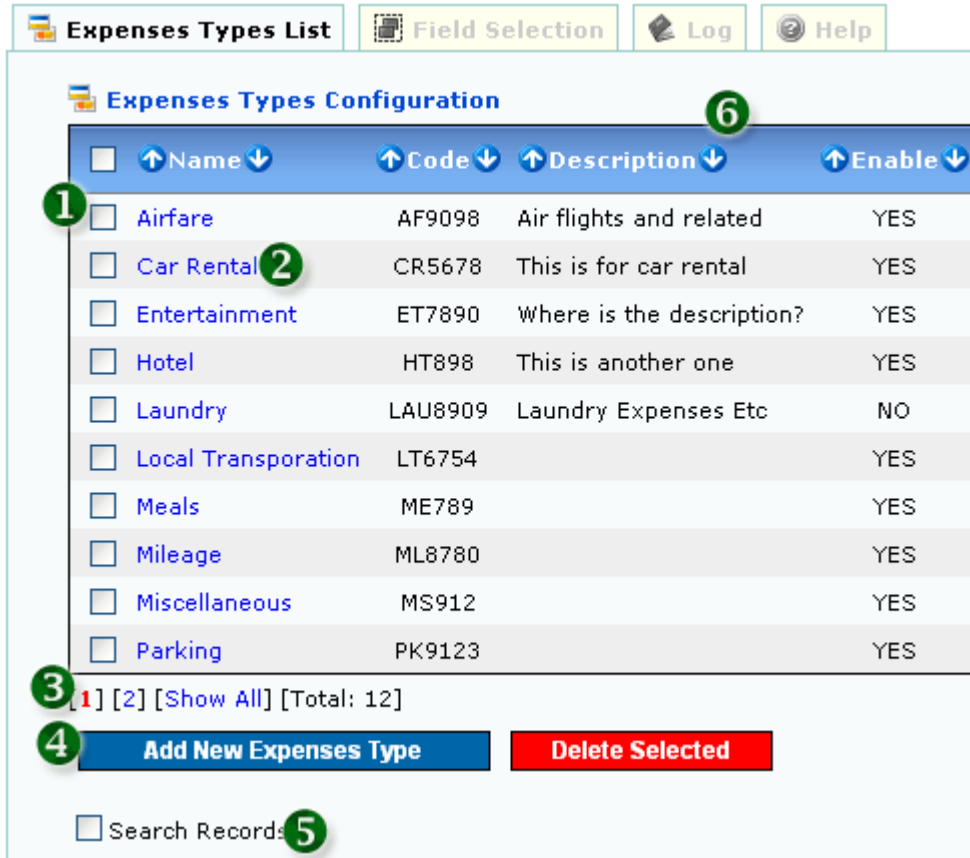
Figure 23: Add Update Employee Type

1. EMPLOYEE-TYPE NAME (MANDATORY)
2. EMPLOYEE-TYPE DESCRIPTION

## 1.1.9 List Expenses Types

 List Expenses Types

Click the " Expenses Types List" Tab to List Expenses Types



<input type="checkbox"/>	Name	Code	Description	Enable
<input type="checkbox"/>	<a href="#">Airfare</a>	AF9098	Air flights and related	YES
<input type="checkbox"/>	<a href="#">Car Rental</a>	CR5678	This is for car rental	YES
<input type="checkbox"/>	<a href="#">Entertainment</a>	ET7890	Where is the description?	YES
<input type="checkbox"/>	<a href="#">Hotel</a>	HT898	This is another one	YES
<input type="checkbox"/>	<a href="#">Laundry</a>	LAU8909	Laundry Expenses Etc	NO
<input type="checkbox"/>	<a href="#">Local Transportation</a>	LT6754		YES
<input type="checkbox"/>	<a href="#">Meals</a>	ME789		YES
<input type="checkbox"/>	<a href="#">Mileage</a>	ML8780		YES
<input type="checkbox"/>	<a href="#">Miscellaneous</a>	MS912		YES
<input type="checkbox"/>	<a href="#">Parking</a>	PK9123		YES

1 2 3 4 5 6

1 2 [Show All] [Total: 12]

[Add New Expenses Type](#) [Delete Selected](#)

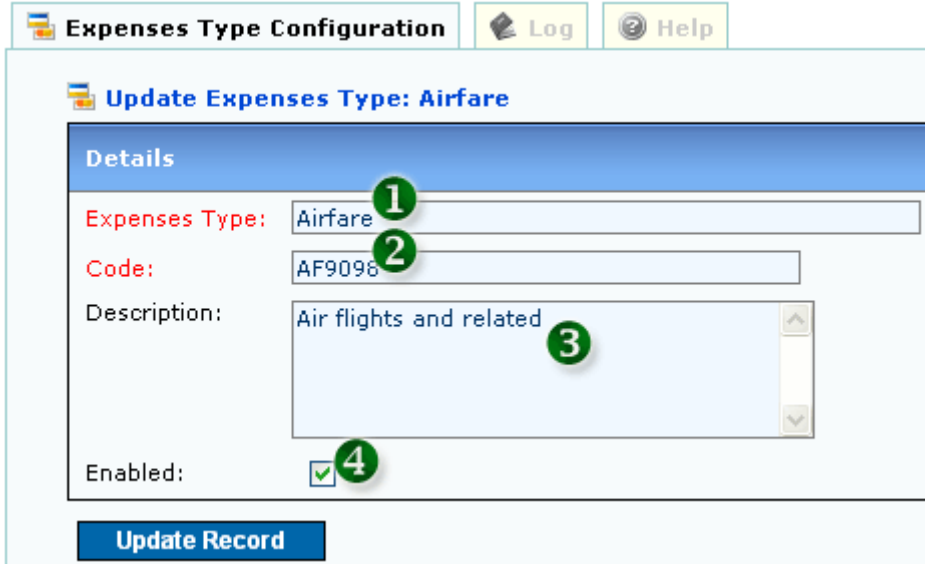
☐ Search Records

Figure 24: List Expenses Types

1. CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD
2. CLICK LINK TO GO TO EDIT MODE
3. LISTING MAX PAGE: Configurable in the User Preference section
4. CLICK TO ADD NEW RECORD
5. CHECK TO SEARCH RECORDS
6. SORTABLE FIELDS

### 1.1.9.1 Add and Update Expenses Type

Click the “ Expenses Type Configuration” Tab to Edit Expenses Type



The screenshot shows a web application interface for configuring expenses. At the top, there is a tab labeled "Expenses Type Configuration" with "Log" and "Help" buttons. Below the tab, the main heading is "Update Expenses Type: Airfare". A "Details" section contains the following fields:

- Expenses Type:** A text field containing "Airfare" (marked with a green circle 1).
- Code:** A text field containing "AF9098" (marked with a green circle 2).
- Description:** A text area containing "Air flights and related" (marked with a green circle 3).
- Enabled:** A checkbox that is checked (marked with a green circle 4).

At the bottom of the form is a blue button labeled "Update Record".

Figure 25: Add and Update Expenses Type

1. EXPENSES TYPE (MANDATORY)
2. EXPENSES CODE (MANDATORY)
3. DESCRIPTION
4. ENABLE EXPENSES-TYPE FOR SELECTION



## 1.1.10 List Phases



Click the " Phases List" Tab to List Phases

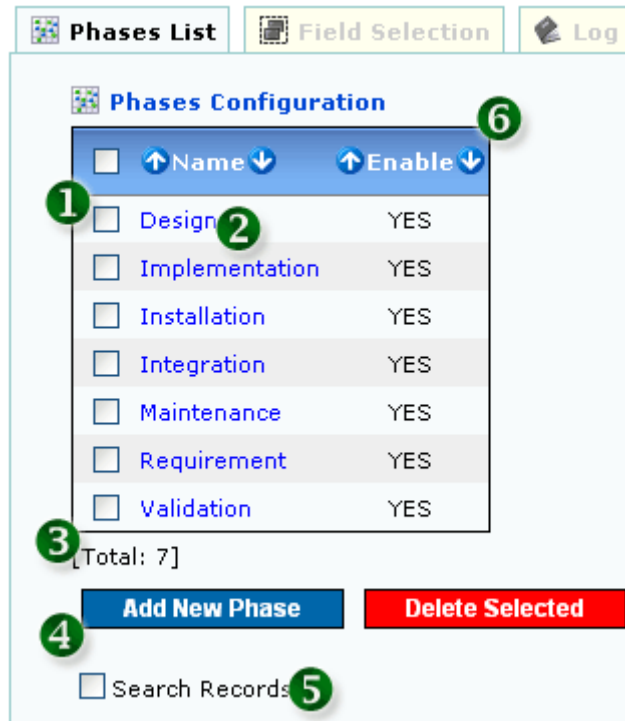
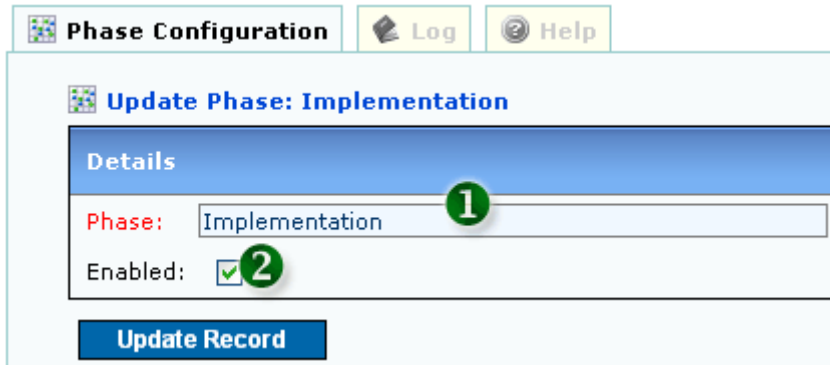


Figure 26: List Phases

1. CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD
2. CLICK LINK TO GO TO EDIT MODE
3. LISTING MAX PAGE: Configurable in the User Preference section
4. CLICK TO ADD NEW RECORD
5. CHECK TO SEARCH RECORDS
6. SORTABLE FIELDS

### 1.1.10.1 Add and Update Phases

Click the “ Phase Configuration” Tab to Edit Phases




The screenshot shows a web application interface for 'Phase Configuration'. At the top, there are three tabs: 'Phase Configuration' (active), 'Log', and 'Help'. Below the tabs, the main content area is titled 'Update Phase: Implementation'. Inside this area, there is a 'Details' section with a blue header. Below the header, there are two fields: 'Phase:' with a text input containing 'Implementation' (marked with a green circle '1'), and 'Enabled:' with a checked checkbox (marked with a green circle '2'). At the bottom of the 'Details' section, there is a blue button labeled 'Update Record'.

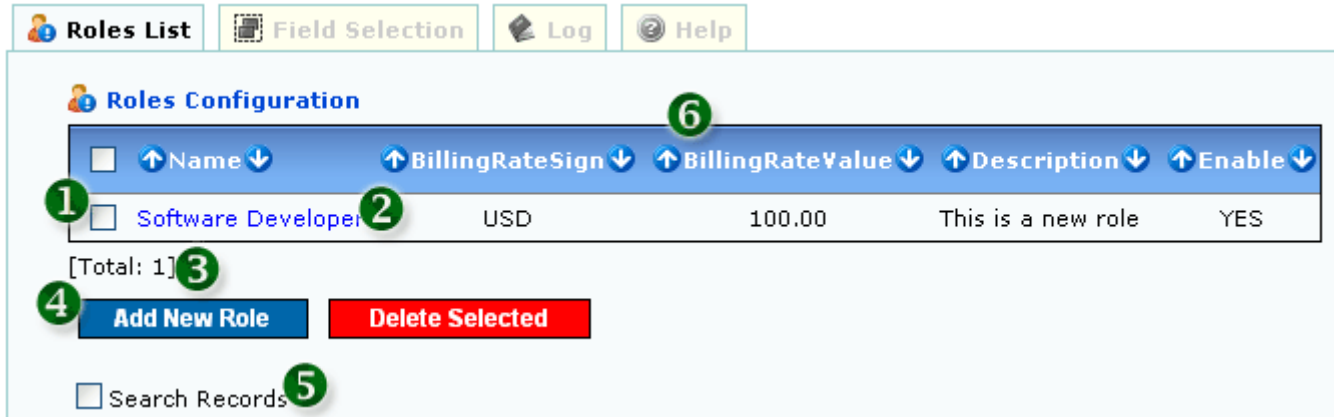
Figure 27: Add and Update Phases

1. PHASE NAME (MANDATORY)
2. ENABLE PHASE TYPE FOR SELECTION

## 1.1.11 List Roles

 List Roles

Click the " Roles List" Tab to List Roles



The screenshot shows the 'Roles Configuration' interface. At the top, there are tabs: 'Roles List' (selected), 'Field Selection', 'Log', and 'Help'. Below the tabs, the 'Roles Configuration' section contains a table with columns: Name, BillingRateSign, BillingRateValue, Description, and Enable. A single record is listed: 'Software Developer' with a billing rate of 'USD' and '100.00', description 'This is a new role', and status 'YES'. Below the table, there is a summary row showing '[Total: 1]'. At the bottom, there are two buttons: 'Add New Role' and 'Delete Selected'. A search bar labeled 'Search Records' is also present. Numbered callouts (1-6) highlight specific features: 1 points to the checkbox for selecting records, 2 points to the 'Software Developer' role name, 3 points to the '[Total: 1]' summary, 4 points to the 'Add New Role' button, 5 points to the 'Search Records' checkbox, and 6 points to the column headers of the table.

<input type="checkbox"/>	↑ Name ↓	↑ BillingRateSign ↓	↑ BillingRateValue ↓	↑ Description ↓	↑ Enable ↓
<input type="checkbox"/>	Software Developer	USD	100.00	This is a new role	YES

[Total: 1]

☐ Search Records

**Add New Role** **Delete Selected**

Figure 28: List Roles

1. CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD
2. CLICK LINK TO GO TO EDIT MODE
3. LISTING MAX PAGE: Configurable in the User Preference section
4. CLICK TO ADD NEW RECORD
5. CHECK TO SEARCH RECORDS
6. SORTABLE FIELDS

### 1.1.11.1 Add and Update Roles

Click the “ Role Configuration” Tab to Edit Roles



**Role Configuration** **Log** **Help**

**Update Role: Software Developer**

**Details**

Role: Software Developer 1

Billing Rate:\* USD 100.00 2

Description: This is a new role 3

Enabled: ☒ 4

**Update Record**

Figure 29: Add and Update Roles

1. ROLE NAME (MANDATORY)
2. BILLING RATE (MANDATORY): Billing Rate per Hour for this Role
3. ROLE DESCRIPTION Billing Rate per Hour for this Role
4. ENABLE THIS ROLE FOR SELECTION


## 1.1.12 List Submitted Timesheets

 List Submitted Timesheets

Click the " Submitted Timesheets List" Tab to List Submitted Timesheets



The screenshot shows the 'Submitted Timesheets List' interface. At the top, there are tabs: 'Submitted Timesheets List' (active), 'Field Selection', 'Log', and 'Help'. Below the tabs is the 'Submitted Timesheets Configuration' section. It features a table with columns: 'Week Start', 'Submitted', 'By', 'Status', and 'Overall'. The table contains three rows of data. Below the table, there is a '[Total: 3]' label, a red 'Undo Timesheet Submission' button, and a 'Search Records' checkbox. Numbered callouts (1-7) point to specific elements: 1 points to the 'Week Start' column header, 2 points to the 'Submitted' column header, 3 points to the 'Status' column header, 4 points to the 'Overall' column header, 5 points to the '[Total: 3]' label, 6 points to the 'Search Records' checkbox, and 7 points to the 'Submitted Timesheets Configuration' title.




<input type="checkbox"/>	↑ Week Start ↓	↑ Submitted ↓	↑ By ↓	Status	↑ Overall ↓
<input type="checkbox"/>	03-December-2006	07-December-2006	David	 (1)  (0)  (0) Pending Supervisor	
<input type="checkbox"/>	03-December-2006	09-December-2006	Gyles	 (0)  (1)  (0) Approved	
<input type="checkbox"/>	26-November-2006	29-November-2006	David	 (1)  (0)  (0) Pending Supervisor	

[Total: 3]

**Undo Timesheet Submission**

☐ Search Records

Figure 30: List Submitted Timesheets

1. CHECK AND CLICK "UNDO TIMESHEET SUBMISSION" TO UNDO TIMESHEET
2. CLICK LINK TO VIEW TIMESHEET
3. DETAILED TIMESHEET STATUS
  - ◆  Pending
  - ◆  Approved
  - ◆  Rejected
4. OVERALL TIMESHEET STATUS
5. LISTING MAX PAGE: Configurable in the User Preference section
6. CHECK TO SEARCH RECORDS
7. SORTABLE FIELDS

### 1.1.13 List Due Timesheets

 List Due Timesheets

Click the " Due Timesheets List" Tab to List Due Timesheets

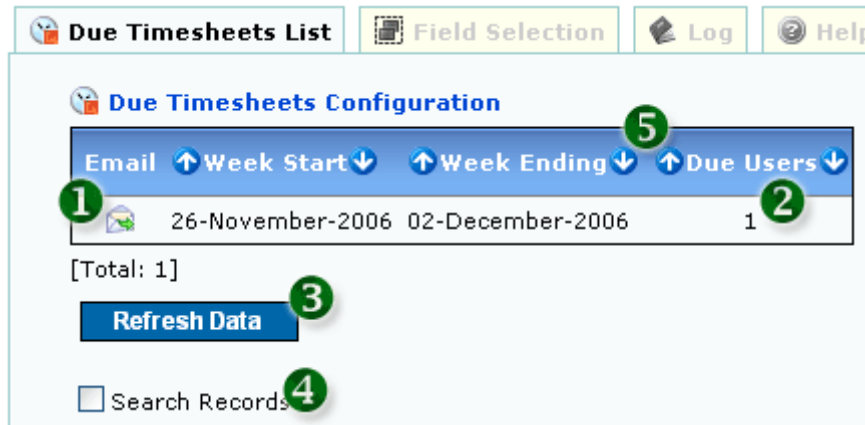



Figure 31: Due Timesheets List

1. CLICK TO SEND EMAIL TO AFFECTED USER(S)
2. NUMBER OF USER(S) AFFECTED FOR THE CURRENT WEEK
3. REFRESH RECORD TO GET THE LATEST DATA
4. CHECK TO SEARCH RECORDS
5. SORTABLE FIELDS

## 1.1.14 List Overdue Timesheets

 List OverDue Timesheets

Click the " OverDue Timesheets List" Tab to List OverDue Timesheets



Figure 32: List Overdue Timesheets

1. CLICK TO SEND EMAIL TO AFFECTED USER(S)
2. NUMBER OF USER(S) AFFECTED FOR THE CURRENT WEEK
3. REFRESH RECORD TO GET THE LATEST DATA
4. CHECK TO SEARCH RECORDS
5. SORTABLE FIELDS

## 1.1.15 Timesheet Due and Overdue Email Reminder

Click the "📧" Icon to Go to Email Reminder Page

**Message Configuration** **Help**

**Overdue Timesheet Reminder For Week Starting 26-November-2006**

**Details**

**From:** [Admin Name] **1**

**Sender Address:** [Admin Email] **2**

**Recipients:**

**Selected** **Available**

Gyles **3**

**CC Supervisor?:** ☐ YES ☒ NO **4**

**Subject:** Timesheet Overdue [Week] **5**

**Content:**

Hi [User Name],

Your current timesheet for the week of [Week] is now overdue. Please take appropriate action ASAP. **6**

**Parser Description**

- [Admin Name] = Current Administrator's Email
- [Admin Email] = Current Administrator's Email
- [User Name] = User Name
- [User Email] = User Email Address
- [Week] = Timesheet's Week Range **7**

**Send Message**

Figure 33: Timesheet Due Overdue Email Reminder

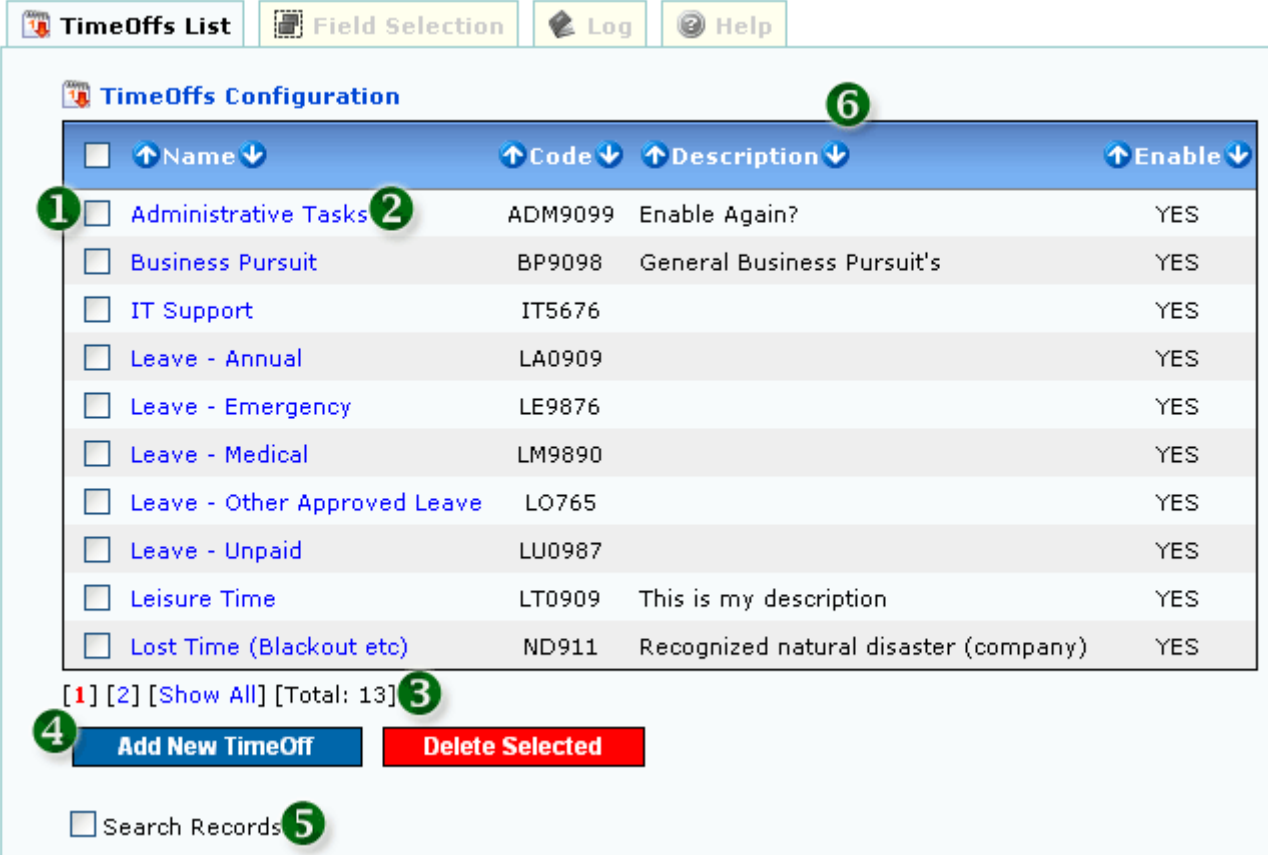
1. SENDER NAME
2. SENDER ADDRESS
3. EMAIL RECIPIENTS
4. CC RECIPIENTS SUPERVISOR
5. EMAIL SUBJECT
6. EMAIL CONTENT
7. **PARSER DESCRIPTION:** All Fields in [XXXXXXX] will be replaced based on the Description



## 1.1.16 List Timeoffs

 List TimeOffs

Click the " TimeOffs List" Tab to List Timeoffs



The screenshot shows the 'TimeOffs List' interface. At the top, there are tabs: 'TimeOffs List' (selected), 'Field Selection', 'Log', and 'Help'. Below the tabs is the 'TimeOffs Configuration' section. It contains a table with columns: Name, Code, Description, and Enable. The table lists various timeoff types such as 'Administrative Tasks', 'Business Pursuit', 'IT Support', 'Leave - Annual', 'Leave - Emergency', 'Leave - Medical', 'Leave - Other Approved Leave', 'Leave - Unpaid', 'Leisure Time', and 'Lost Time (Blackout etc)'. Below the table, there are controls for adding new records, deleting selected records, and searching records. The interface also includes pagination controls and a total count of 13 records.

<input type="checkbox"/>	Name	Code	Description	Enable
<input type="checkbox"/>	Administrative Tasks	ADM9099	Enable Again?	YES
<input type="checkbox"/>	Business Pursuit	BP9098	General Business Pursuit's	YES
<input type="checkbox"/>	IT Support	IT5676		YES
<input type="checkbox"/>	Leave - Annual	LA0909		YES
<input type="checkbox"/>	Leave - Emergency	LE9876		YES
<input type="checkbox"/>	Leave - Medical	LM9890		YES
<input type="checkbox"/>	Leave - Other Approved Leave	LO765		YES
<input type="checkbox"/>	Leave - Unpaid	LU0987		YES
<input type="checkbox"/>	Leisure Time	LT0909	This is my description	YES
<input type="checkbox"/>	Lost Time (Blackout etc)	MD911	Recognized natural disaster (company)	YES

[1] [2] [Show All] [Total: 13]

☐ Search Records

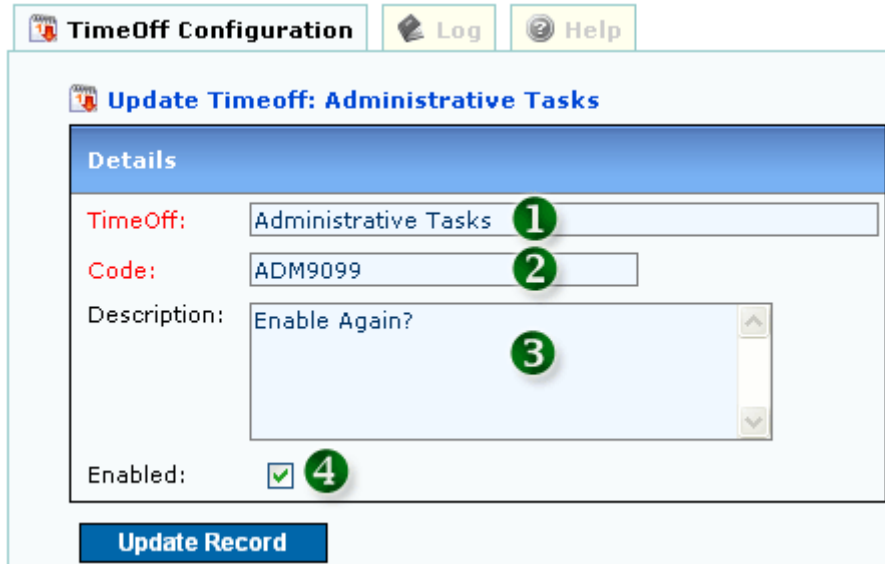
**Add New TimeOff** **Delete Selected**

Figure 34: List Timeoffs

1. CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD
2. CLICK LINK TO GO TO EDIT MODE
3. LISTING MAX PAGE: Configurable in the User Preference section
4. CLICK TO ADD NEW RECORD
5. CHECK TO SEARCH RECORDS
6. SORTABLE FIELDS

### 1.1.16.1 Add and Update Timeoffs

Click the " TimeOff Configuration" Tab to Edit Timeoffs



The screenshot shows a web application interface for "TimeOff Configuration". At the top, there are three tabs: "TimeOff Configuration" (selected), "Log", and "Help". Below the tabs is a section titled "Update Timeoff: Administrative Tasks". Inside this section is a "Details" form with the following fields:


- TimeOff:** A text box containing "Administrative Tasks" (labeled 1).
- Code:** A text box containing "ADM9099" (labeled 2).
- Description:** A text box containing "Enable Again?" (labeled 3).
- Enabled:** A checkbox that is checked (labeled 4).

At the bottom of the form is a blue button labeled "Update Record".

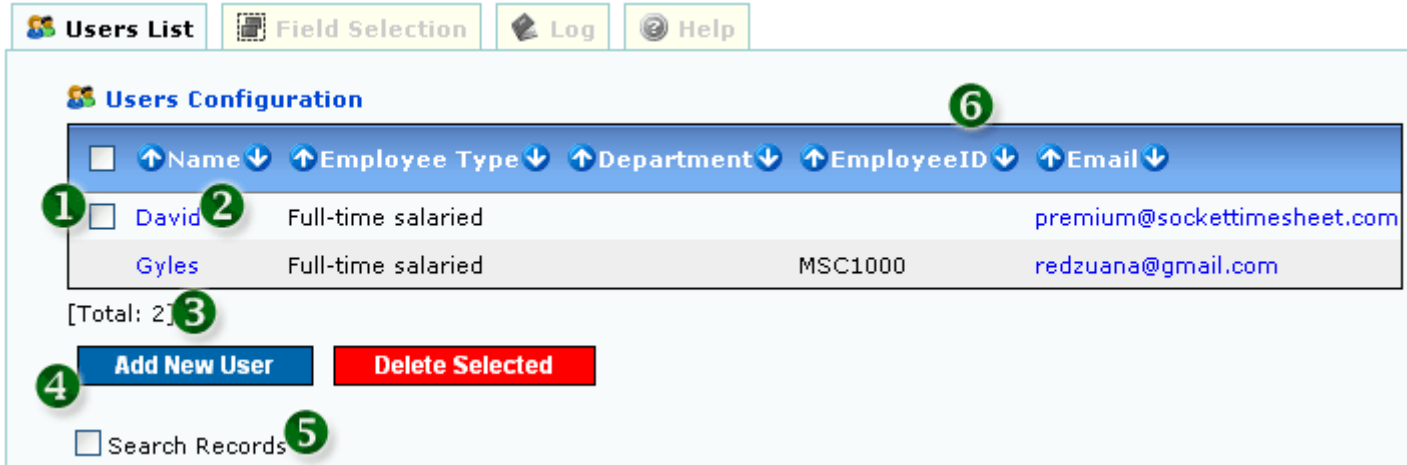
Figure 35: Add and Update Timeoffs

1. TIMEOFF NAME (MANDATORY)
2. TIMEOFF CODE (MANDATORY)
3. TIMEOFF DESCRIPTION
4. ENABLE THIS TIMEOFF FOR SELECTION IN SYSTEM

## 1.1.17 List Users

 List Users

Click the " Users List" Tab to List Users



The screenshot shows the 'Users List' interface. At the top, there are tabs: 'Users List' (selected), 'Field Selection', 'Log', and 'Help'. Below the tabs is the 'Users Configuration' section. It features a table with columns: Name, Employee Type, Department, EmployeeID, and Email. The table contains two rows: 'David' (Full-time salaried, premium@sockettimesheet.com) and 'Gyles' (Full-time salaried, MSC1000, redzuana@gmail.com). Below the table, there is a '[Total: 2]' label, an 'Add New User' button, a 'Delete Selected' button, and a 'Search Records' checkbox. Numbered callouts indicate: 1. Check box for selecting a record; 2. Link to edit a record; 3. Total count; 4. Add New User button; 5. Search Records checkbox; 6. Sortable fields header.

<input type="checkbox"/>	Name	Employee Type	Department	EmployeeID	Email
<input type="checkbox"/>	David	Full-time salaried			premium@sockettimesheet.com
<input type="checkbox"/>	Gyles	Full-time salaried	MSC1000		redzuana@gmail.com


[Total: 2]

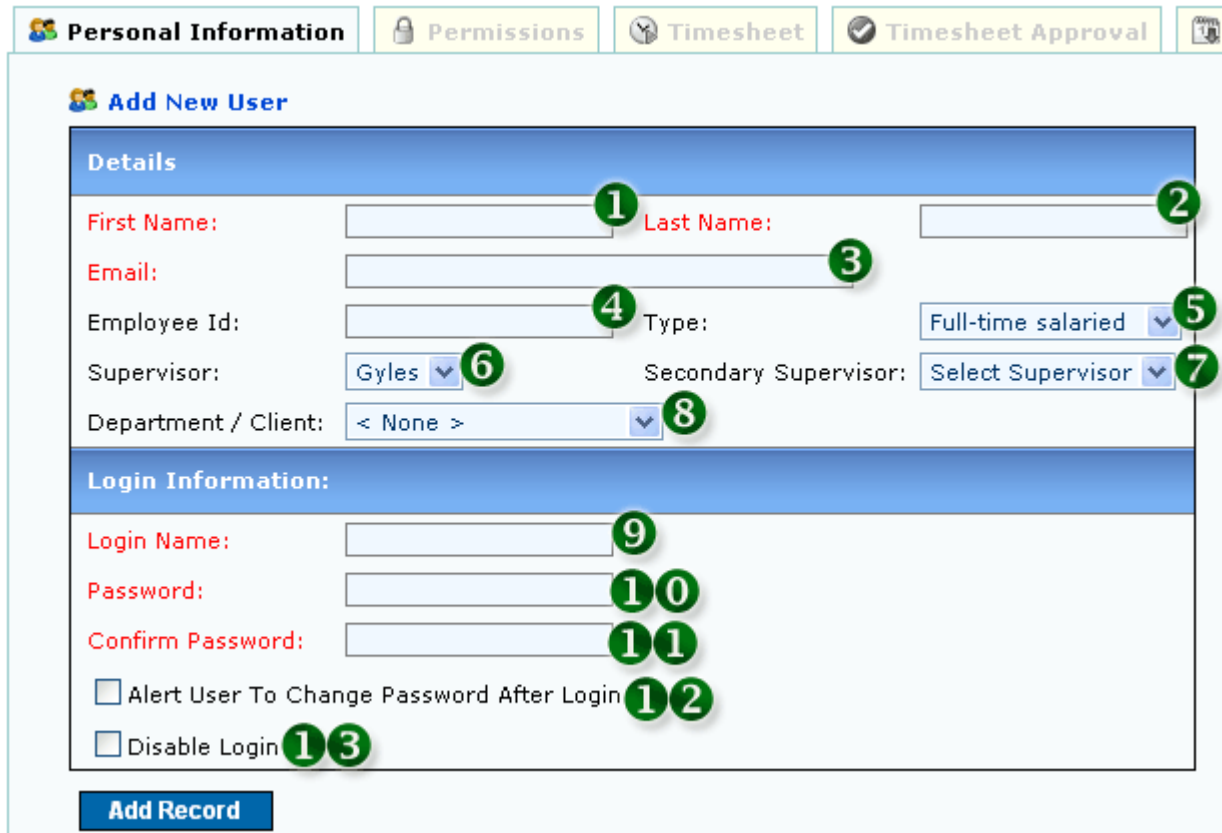
☐ Search Records

Figure 36: List Users

1. CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD
2. CLICK LINK TO GO TO EDIT MODE
3. LISTING MAX PAGE: Configurable in the User Preference section
4. CLICK TO ADD NEW RECORD
5. CHECK TO SEARCH RECORDS
6. SORTABLE FIELDS

### 1.1.17.1 Add and Update User's Personal Information

Click the "  Personal Information" Tab to Update User's Personal Information



**Personal Information** | Permissions | Timesheet | Timesheet Approval

**Add New User**

**Details**

First Name:  1 Last Name:  2

Email:  3

Employee Id:  4 Type: Full-time salaried 5

Supervisor: Gyles 6 Secondary Supervisor: Select Supervisor 7

Department / Client: < None > 8

**Login Information:**

Login Name:  9

Password:  10

Confirm Password:  11

☐ Alert User To Change Password After Login 12


☐ Disable Login 13

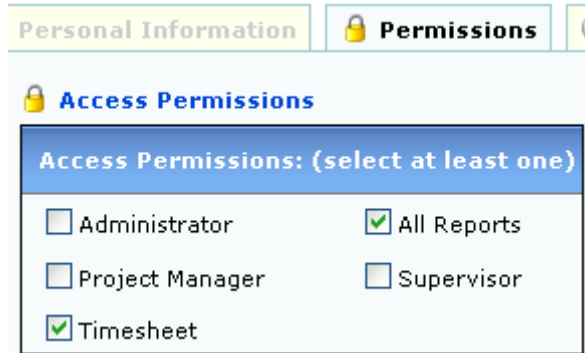
**Add Record**

Figure 37: Add and Update User's Personal Information

1. FIRST NAME (MANDATORY)
2. LAST NAME (MANDATORY)
3. EMAIL ADDRESS (MANDATORY)
4. EMPLOYEE ID
5. EMPLOYEE TYPE
6. SUPERVISOR: Listed for Users with Supervisor Permission only
7. SECONDARY SUPERVISOR: Listed for Users with Supervisor Permission only
8. DEPARTMENT OR CLIENT
9. USER LOGIN (MANDATORY)
10. USER PASSWORD (MANDATORY)
11. PASSWORD CONFIRMATION (MANDATORY)
12. PASSWORD ALERT: When checked, User will be prompted to Change Password after Login
13. DISABLE LOGIN: When checked, User cannot Login to System

### 1.1.17.2 Add and Update User's Permissions

Click the “ **Permissions**” Tab to Update User's Personal Information



Access Permissions: (select at least one)	
<input type="checkbox"/> Administrator	<input checked="" type="checkbox"/> All Reports
<input type="checkbox"/> Project Manager	<input type="checkbox"/> Supervisor
<input checked="" type="checkbox"/> Timesheet	

*Figure 38: Add and Update User's Permission*

**ADMINISTRATOR:** Full Access and Permission to All Areas


**PROJECT MANAGER:** Permission to Create, Edit and Delete Projects and Tasks

**TIMESHEET:** Permission to Add and Update Timesheets (DEFAULT)

**ALL REPORTS:** Permission to Access All Reports (DEFAULT)

**SUPERVISOR:** Permission to become Supervisor to Users

### 1.1.17.3 Add and Update User's Timesheet Settings

Click the "  **Timesheet** " Tab to Update User's Timesheet Settings




The screenshot shows the 'Timesheet' tab selected in a navigation bar. Below it is the 'Timesheet Information' section. The form contains the following fields and options:

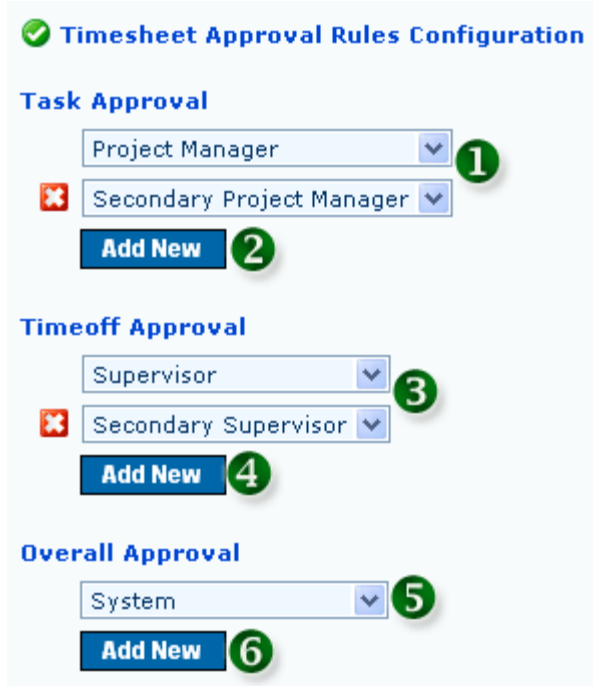
- Hourly Cost:** A dropdown menu set to 'USD' and a text input field with '0.00'. A green circle with the number '1' is next to the input field.
- Hours Per Day:** A text input field with '8.00'. A green circle with the number '2' is next to the input field.
- Hours Per Week:** A text input field with '40.00'. A green circle with the number '3' is next to the input field.
- Force Hours / Day?:** Radio buttons for 'Yes' (selected) and 'No'. A green circle with the number '4' is next to the 'Yes' button.
- Force Hours / Week?:** Radio buttons for 'Yes' (selected) and 'No'. A green circle with the number '5' is next to the 'Yes' button.
- Mandatory Timesheet?:** Radio buttons for 'Yes' (selected) and 'No'. A green circle with the number '6' is next to the 'Yes' button.
- Activation Date:** A date input field with 'Dec 10 2006' and a calendar icon. A green circle with the number '7' is next to the input field.

*Figure 39: Add and Update User's Timesheet Settings*

1. **HOURLY COST:** Hourly Cost per Hour
2. **HOURS PER DAY:** Minimum Hours of Timesheet submission for one Working Day
3. **HOURS PER WEEK:** Minimum Hours of Timesheet submission for one week
4. **FORCE HOURS / DAY:** Mandatory for User to meet hours / day rule
5. **FORCE HOURS / WEEK:** Mandatory for User to meet hours / week rule
6. **MANDATORY TIMESHEET:** Mandatory for User to enter weekly Timesheet
7. **ACTIVATION DATE:** User needs to enter Timesheet starting this Date


## 1.1.17.4 Add and Update User's Timesheet Approval Rules



Click the "  Timesheet Approval " Tab to update User's Timesheet Approval Rules



**Timesheet Approval Rules Configuration**


**Task Approval**



Project Manager  **1**

 Secondary Project Manager 

**Add New** **2**


**Timeoff Approval**

Supervisor  **3**

 Secondary Supervisor 

**Add New** **4**

**Overall Approval**


System  **5**

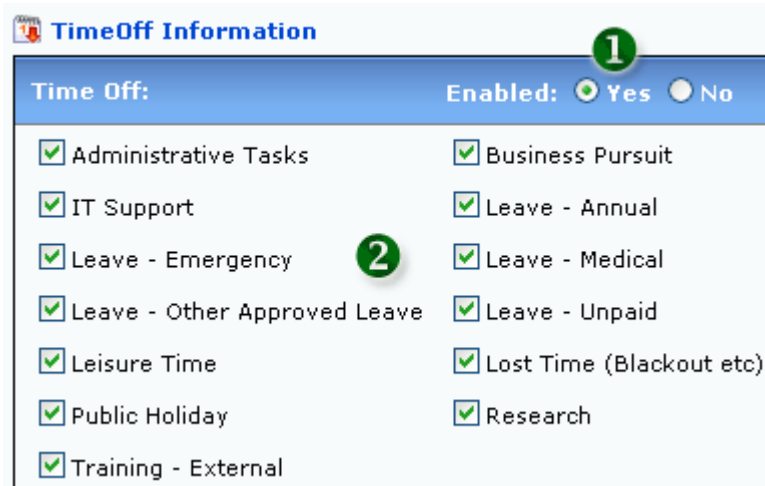
**Add New** **6**

Figure 40: Timesheet Approval Rules

1. TASK APPROVAL DEFAULT RULES
2. ADD TASK APPROVAL RULE
3. TIMEOFF APPROVAL DEFAULT RULES
4. ADD TIMEOFF APPROVAL RULE
5. **OVERALL APPROVAL DEFAULT RULE:** System Overall Approval will trigger after the Task and Timeoff approvals have been satisfied first
6. ADD OVERALL APPROVAL RULE

### 1.1.17.5 Add and Update User's Timeoff Rules

Click the "  TimeOff " Tab to update User's Timeoff Rules



Time Off:		Enabled: <input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="checkbox"/> Administrative Tasks	<input checked="" type="checkbox"/> Business Pursuit	
<input checked="" type="checkbox"/> IT Support	<input checked="" type="checkbox"/> Leave - Annual	
<input checked="" type="checkbox"/> Leave - Emergency	<input checked="" type="checkbox"/> Leave - Medical	
<input checked="" type="checkbox"/> Leave - Other Approved Leave	<input checked="" type="checkbox"/> Leave - Unpaid	
<input checked="" type="checkbox"/> Leisure Time	<input checked="" type="checkbox"/> Lost Time (Blackout etc)	
<input checked="" type="checkbox"/> Public Holiday	<input checked="" type="checkbox"/> Research	
<input checked="" type="checkbox"/> Training - External		


Figure 41: Timeoff Display Settings

1. ENABLE / DISABLE TIMEOFF OPTION IN TIMESHEET
2. SELECT TIMEOFF OPTIONS IN TIMESHEET



## 1.1.18 Multiple Users Settings

 Settings Multi Users

Click the " Multi Users Configuration" Tab to Configure Multiple Users

Multi Users Configuration

Log

Help

Settings Multi Users

Select Users

Selected

David

1

Available

Gyles

General Configuration

☐ Date Format:

DD-MONTH-YYYY

2

☐ Name Format:

FName

3

☐ Currency Preference:

US Dollar

4

☐ List Max Lines Per Page:

10

5

☐ Default Thousand Separator (SPC For Space):

,

6

☐ Default Decimal Separator (SPC For Space):

.

7

☐ Task Wrapping:

Auto Wrap

No Wrap

8

☐ Show Only Open Tasks In Open Projects List?:

Yes

No

9

☐ Expand All Project SubTasks By Default?:

Yes

No

10

☐ Change Password:

12

☐ Alert User To Change Password After Login

Timesheet Configuration

☐ Hourly Cost:

USD

0.00

13

☐ Hours Per Day:

8.00

14

☐ Hours Per Week:

40.00

15

☐ Force Hours / Day?

Yes

No

16

☐ Force Hours / Week?

Yes

No

17

☐ Mandatory Timesheet?

Yes

No

18

Update Record

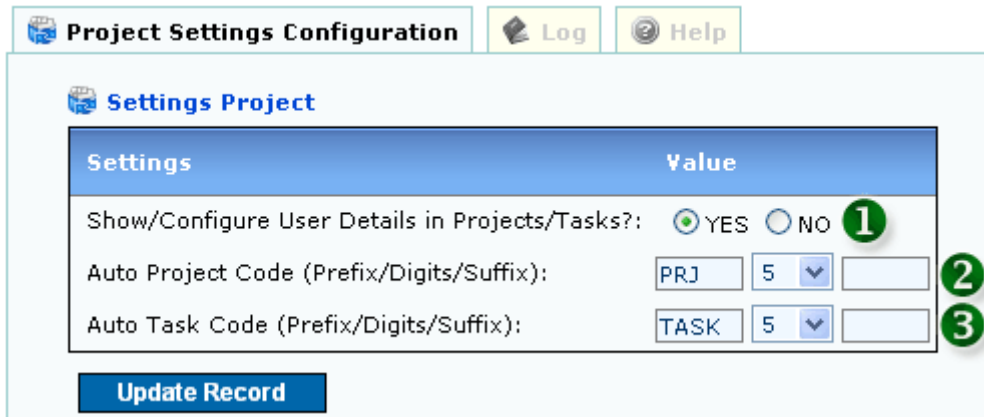
Figure 42: Configure Multiple Users

1. SELECT USER(S)
2. DATE FORMATTING PREFERENCE
3. NAME FORMATTING PREFERENCE
4. CURRENCY PREFERENCE
5. MAXIMUM LINES PER PAGE FOR LISTING
6. THOUSAND SEPARATOR: Enter 'SPC' for Space
7. DECIMAL SEPARATOR: Enter 'SPC' for Space
8. TASK WRAPPING: Automatic Task Wrap during Timesheet
9. ONLY OPEN TASKS SHOWN IN OPEN PROJECTS LIST
10. PROJECT TREE LISTING EXPANDED BY DEFAULT
11. CHANGE PASSWORD
12. ALERT PASSWORD CHANGE
13. HOURLY COST PER USER
14. TIMESHEET DEFAULT HOURS PER DAY
15. TIMESHEET DEFAULT HOURS PER WEEK
16. FORCE HOURS PER WORKING DAY IN TIMESHEET
17. FORCE HOURS PER WEEK IN TIMESHEET
18. MAKE TIMESHEET MANDATORY FOR USER

## 1.1.19 Project Settings

 Settings Project

Click the  "Project Settings Configuration" Tab to Configure Project Default Settings



Settings	Value
Show/Configure User Details in Projects/Tasks?:	<input checked="" type="radio"/> YES <input type="radio"/> NO
Auto Project Code (Prefix/Digits/Suffix):	PRJ 5 <span>▼</span>
Auto Task Code (Prefix/Digits/Suffix):	TASK 5 <span>▼</span>

**Update Record**

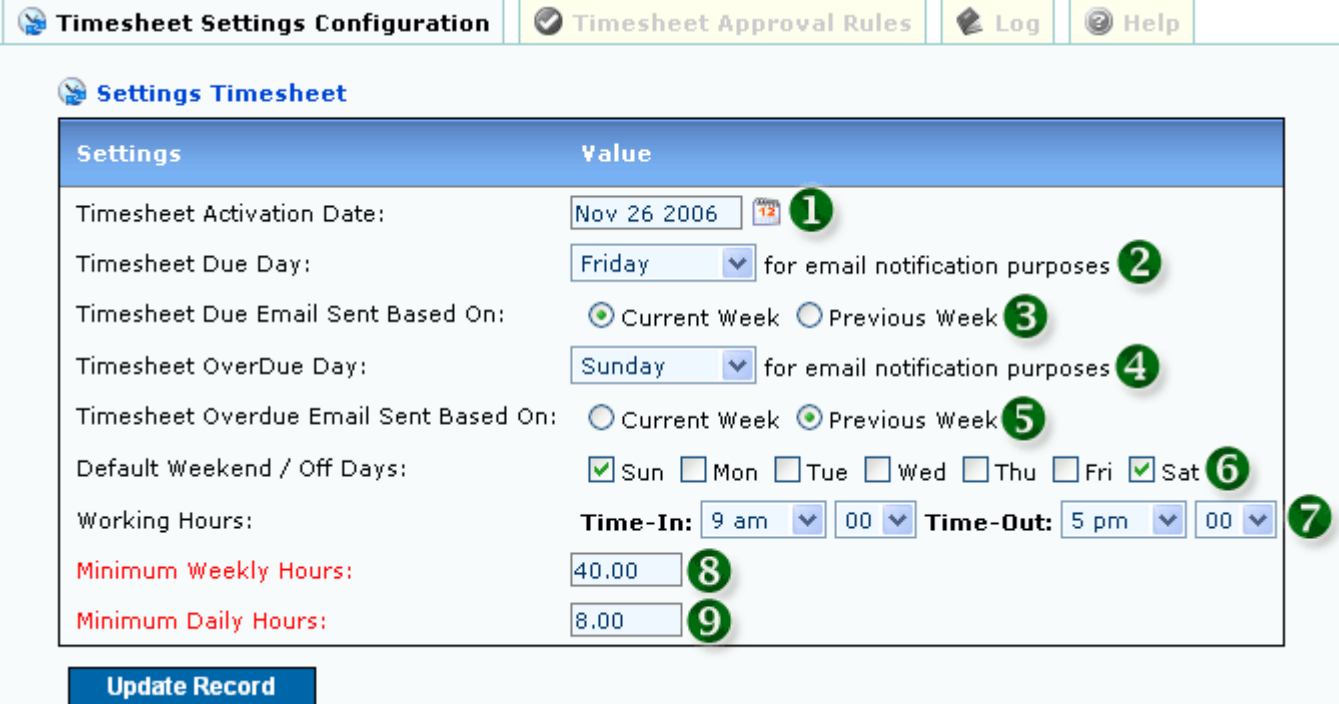
Figure 43: Configure Project Settings








1. CONFIGURE SPECIFIC MEMBERS DETAILS IN PROJECTS AND TASKS
2. PROJECT CODE GENERATION RULES
3. TASK CODE GENERATION RULES

## 1.1.20 Timesheet Settings

 Settings Timesheet

Click the " Timesheet Settings Configuration" Tab to Configure Timesheet Default Settings



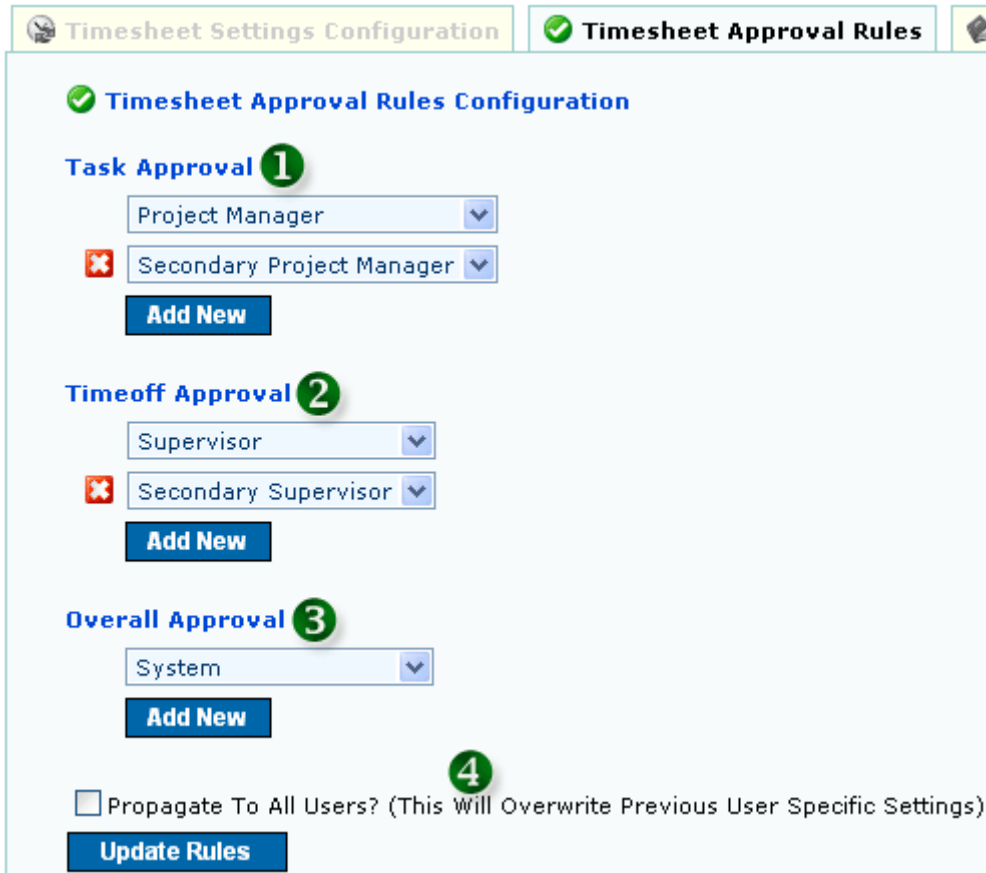
Settings	Value
Timesheet Activation Date:	Nov 26 2006 
Timesheet Due Day:	Friday  for email notification purposes
Timesheet Due Email Sent Based On:	<input checked="" type="radio"/> Current Week <input type="radio"/> Previous Week
Timesheet OverDue Day:	Sunday  for email notification purposes
Timesheet Overdue Email Sent Based On:	<input type="radio"/> Current Week <input checked="" type="radio"/> Previous Week
Default Weekend / Off Days:	<input checked="" type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat
Working Hours:	Time-In: 9 am  00  Time-Out: 5 pm  00 
Minimum Weekly Hours:	40.00
Minimum Daily Hours:	8.00

**Update Record**

Figure 44: Timesheet Settings Configuration

- 1. TIMESHEET ACTIVATION DATE:** System Based Timesheet Activation Date
- 2. TIMESHEET DUE DAY:** Due Day for Reminder Email to be Sent. Refer Email Admin for Further Configuration
- 3. DUE EMAIL SENT BASED ON DATA ON CURRENT OR PREVIOUS WEEK**
- 4. TIMESHEET OVERDUE DAY:** OverDue Day for Reminder Email to be Sent. Refer Email Admin for Further Configuration
- 5. OVERDUE EMAIL SENT BASED ON DATA ON CURRENT OR PREVIOUS WEEK**
- 6. SYSTEM BASED WEEKLY OFF DAYS:** Users can change their own Off Days via User Preference
- 7. DEFAULT WORKING HOURS:** User can change via Timesheet
- 8. DEFAULT MINIMUM WEEKLY HOURS (MANDATORY):** Can be further configured per User via User Update
- 9. DEFAULT MINIMUM DAILY HOURS (MANDATORY):** Can be further configured per User via User Update

Click the "  **Timesheet Approval Rules** " Tab to Configure Timesheet Approval Settings



**Timesheet Approval Rules Configuration**

**Task Approval 1**

Project Manager

Secondary Project Manager

Add New

**Timeoff Approval 2**

Supervisor

Secondary Supervisor

Add New

**Overall Approval 3**

System

Add New

☐ Propagate To All Users? (This Will Overwrite Previous User Specific Settings) 4

Update Rules

Figure 45: Timesheet Approval Settings

1. TIMESHEET TASK APPROVAL CONFIGURATION
2. TIMEOFF TASK APPROVAL CONFIGURATION
3. OVERALL TASK APPROVAL CONFIGURATION
4. PROPAGATE RULES TO ALL USERS