SocketTimesheet™

USER MANUAL FOR VERSION 3.+

'Php Web Based Timesheet, And Project Tracking Software'
By: Creative-Dr Sdn. Bhd.

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1. Top Menu

1.1 Top Menu

The TOP Menu is the selection menu for all major features in Socket Timesheet.

Figure 1: Top Menu

1. **HOME:** Default Page After Login
2. **PROJECTS:** Projects Related Page
3. **TIMESHEET:** Timesheet Related Page
4. **APPROVALS:** Timesheet Approvals Page
5. **REPORTS:** Reports Page
6. **PREFERENCE:** User Specific Preference Page

2. Projects

Click the PROJECTS icon at the top menu to access the Project Module.

Figure 2: Projects Top Menu

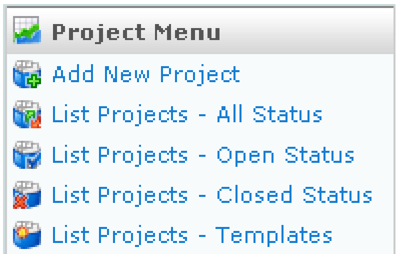


Figure 3: Projects Left Side Menu

2.1 Add New Project

Click the " **New Project Configuration**" Tab to Add New Project

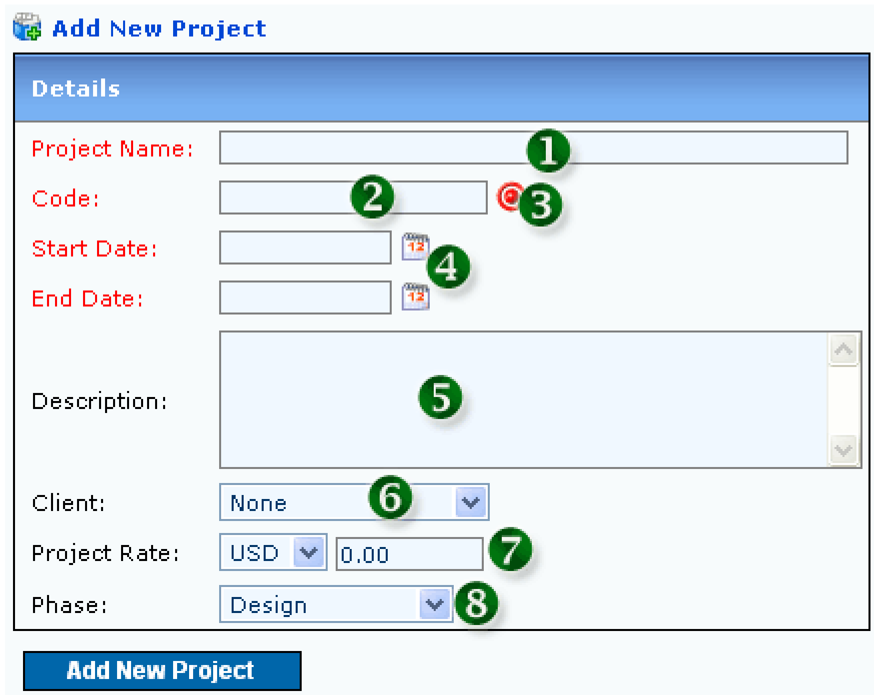


Figure 4: Add New Project

1. **PROJECT NAME (MANDATORY):** Only one unique Project Name can exist within the system
2. **PROJECT CODE (MANDATORY):** Only one unique Project Code can exist within the system
3. **CLICK TO AUTOMATE PROJECT CODE GENERATION:** The rules of Project Code auto-generation naming convention can be changed by Admin
4. **START DATE AND END DATE (MANDATORY)**
5. **PROJECT DESCRIPTION**
6. **PROJECT CLIENT**
7. **PROJECT RATE:** Rate per hour charged in timesheet
8. **CURRENT PROJECT PHASE:** Phase value editable by Admin

2.1.1 Add New Project Team Members

Click the " **Project Members** " Tab to Add New Team Members

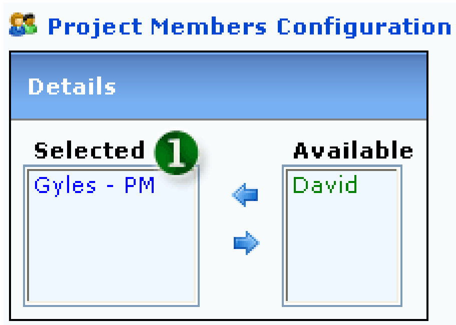


Figure 5: Project Team Members

1. PROJECT CREATOR WILL BE AUTOMATICALLY DEFAULT AS PM:

- New Team Members or Departments can be selected from the “Available” Box
- Tasks will refer to Team Members in its Projects as reference for its own Team Members. However, if mistakes are made, they can be rectified in the “Update Project” later.
- Normal Team Members can View Projects, Add Notes, Upload Documents and enter hours in Timesheet to the tasks in Projects. However, they cannot edit projects.
- PM or Secondary PM are Administrators or Owners of the Projects and have Full Rights to the Projects

2.2 Updating Projects

System will automatically move to Update Project Mode after successful Project Addition. Projects can also be Updated via links in the List Project section (**refer Listing Projects at 2.6**)

2.2.1 Project Configuration

Click the “ **Configuration**” Tab to Update Project Configuration

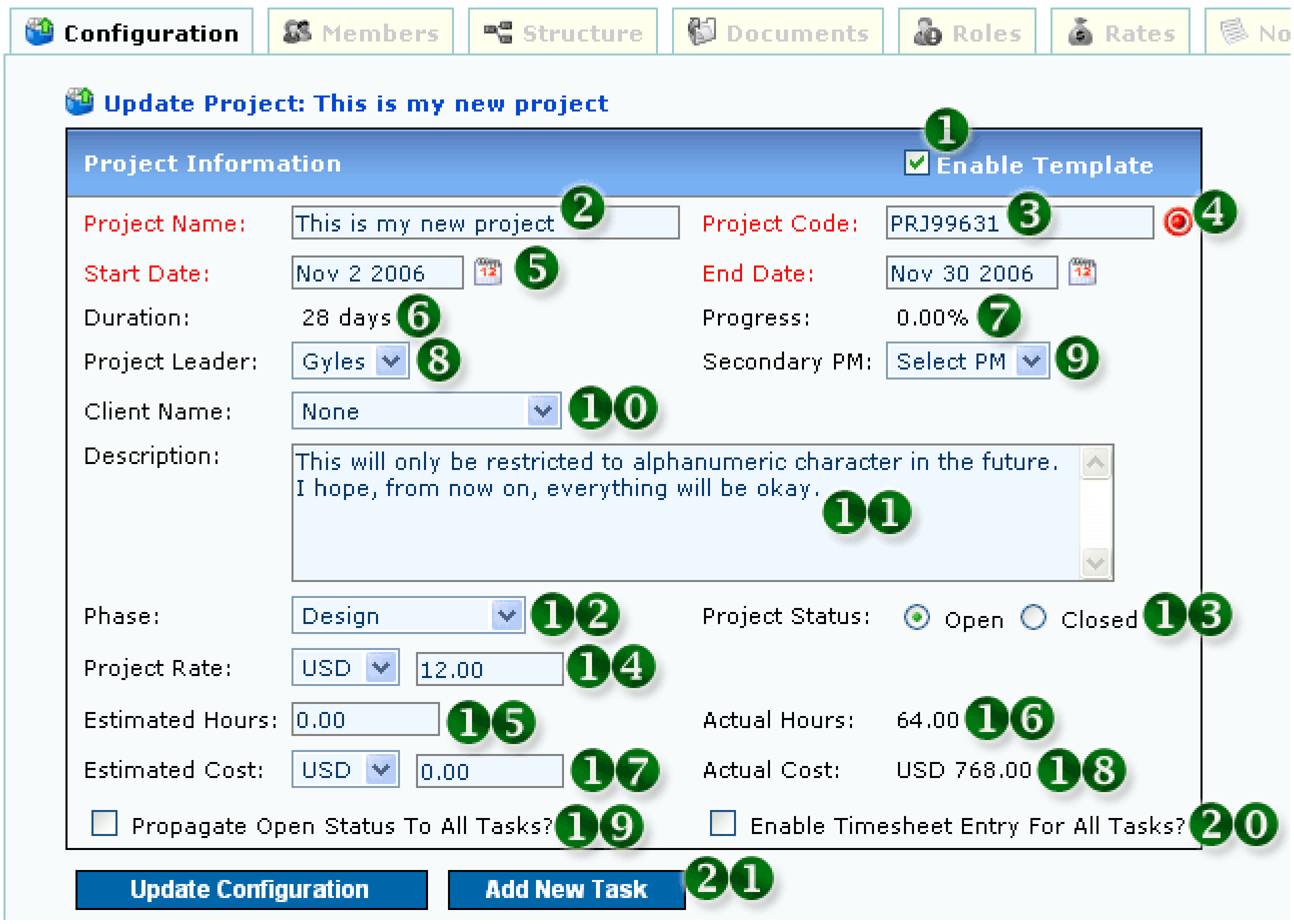


Figure 6: Project Update Configuration Page

1. **ENABLE PROJECT AS TEMPLATE:** This template will appear in the "List Projects - Templates" menu
2. **PROJECT NAME:** Only one unique Project Name can exist within the system
3. **PROJECT CODE:** Only one unique Project Code can exist within the system
4. **GENERATE PROJECT CODE AUTOMATICALLY:** The rules of Project Code auto-generation naming convention can be changed by Admin
5. **START AND END DATE**

6. PROJECT DURATION: Days from Start Date and End Date

7. PROGRESS PERCENTAGE: Calculated Automatically via average percentage from Tasks in project

8. PROJECT MANAGER / LEADER SELECTION: Current PM can be changed with a New PM. Only Users with “Project Manager” Permission will appear in the Selection. This Permission can be set by the Administrator

9. SECONDARY PROJECT MANAGER / LEADER SELECTION: Current Secondary PM can be changed or added with a New Secondary PM. Only Users with “Project Manager” Permission will appear in the Selection. This Permission can be set by the Administrator.

10. PROJECT CLIENT SELECTION: Client can be added/updated by Administrator

11. PROJECT DESCRIPTION

12. PROJECT PHASES SELECTION: Phase can be added/updated by Administrator

13. PROJECT STATUS: Open or Closed

14. PROJECT RATE: Default Project Rate per hour charged in Timesheet.

15. ESTIMATED TOTAL PROJECT HOURS

16. ACTUAL HOURS CHARGED IN TIMESHEET: Actual Hours charged for Tasks in this Project

17. ESTIMATED TOTAL PROJECT COST

18. ACTUAL COST BASED ON HOURS CHARGED IN TIMESHEET: Actual Cost charged for Tasks in this Project

19. CHECK TO PROPAGATE OPEN STATUS TO ALL TASKS: Only for Projects with “Open” Status. This will change all Tasks Status to “Open”. Closed Projects will automatically trigger a “Closed” status in all Tasks

20. ENABLE TIMESHEET ENTRY FOR THIS PROJECT

21. CLICK TO ADD NEW TASK FOR THIS PROJECT

2.2.2 Project Team Members

Click the " Members " Tab to Update Project Team Members

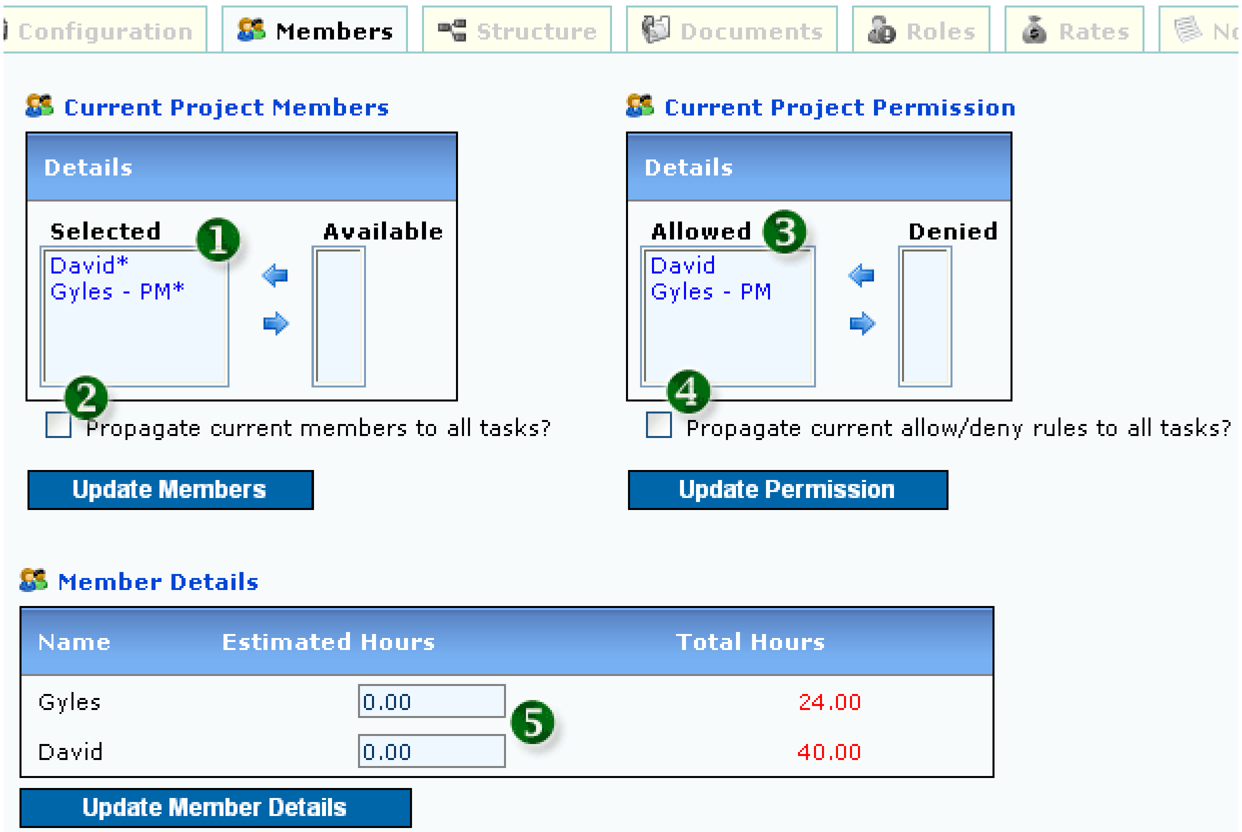


Figure 7: Project Update Team Members Page

1. CURRENT PROJECT MEMBERS: Members with '*' cannot be removed as they have timesheet hours already charged to the project. Members removed from project members will be automatically removed in Tasks as well. Members added to Projects will NOT be automatically added in Tasks but needs to be Propagated Manually

2. PROPAGATE MEMBERS TO TASKS AS WELL: Members added in project can be automatically added to Tasks by checking this box and clicking "Update Members".

3. ALLOW / DENY CURRENT TEAM TO ACCESS PROJECT: Any Current Team Members can be denied access to the Project and its Tasks.

4. PROPAGATE ALLOW / DENY CURRENT TEAM TO TASKS AS WELL: Propagate the current Allow / Deny Rules to Tasks as well

5. PROJECT MEMBERS' ESTIMATED VS ACTUAL HOURS: This is a Comparison Table for every Team Members in the Project versus their Hours charged in Timesheet

2.2.3 Project Structure

Click the “ **Structure** ” Tab to View the Current Project Structure

Figure 8: Project Structure Page

1. CLICK LINK TO GO TO DIFFERENT TASKS: The link in red is the current Project / Task selection

2.2.4 Project Documents

Click the “ **Documents** ” Tab to View the Currently Shared Project Documents

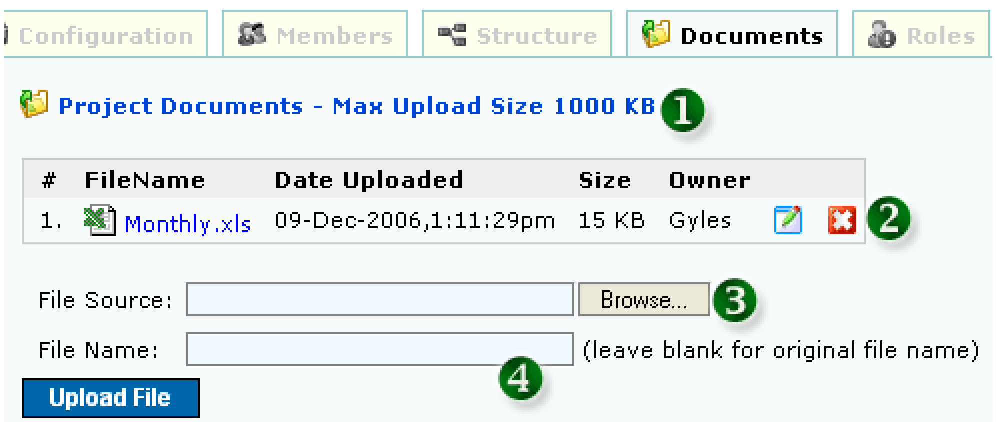


Figure 9: Project Documents

1. CURRENT ALLOWABLE UPLOAD SIZE: Changeable by Admin

2. UPLOADED FILES INFORMATION: Download, Rename and Delete Files. All Project Team Members can upload files to Project. Only the documents owner can update or delete documents.

3. SELECT FILE TO UPLOAD: Files with size that is more than allowable will be ignored during upload

4. RENAME UPLOADED FILE: File will assume the original name if there is no value in this field

2.2.5 Project Roles

Click the " Roles " Tab to Select Available Roles

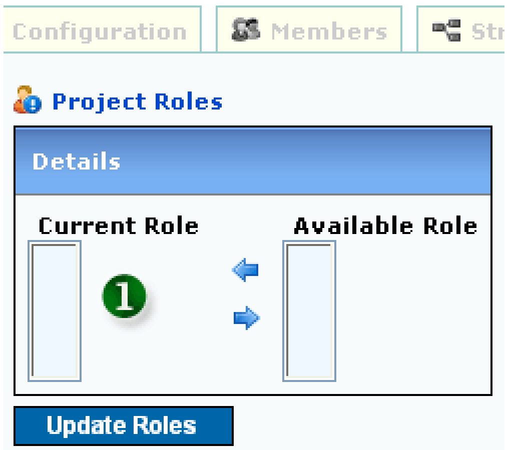


Figure 10: Project Roles

1. **AVAILABLE PROJECT ROLES:**
   - New Project Roles can be added by Admin. Project Roles serve as an addition to the Default Rate for Users, Projects and Departments in the Project Rates selection.

2.2.6 Project Rates

Click the " Rates " Tab to Assign Rates to Project Members

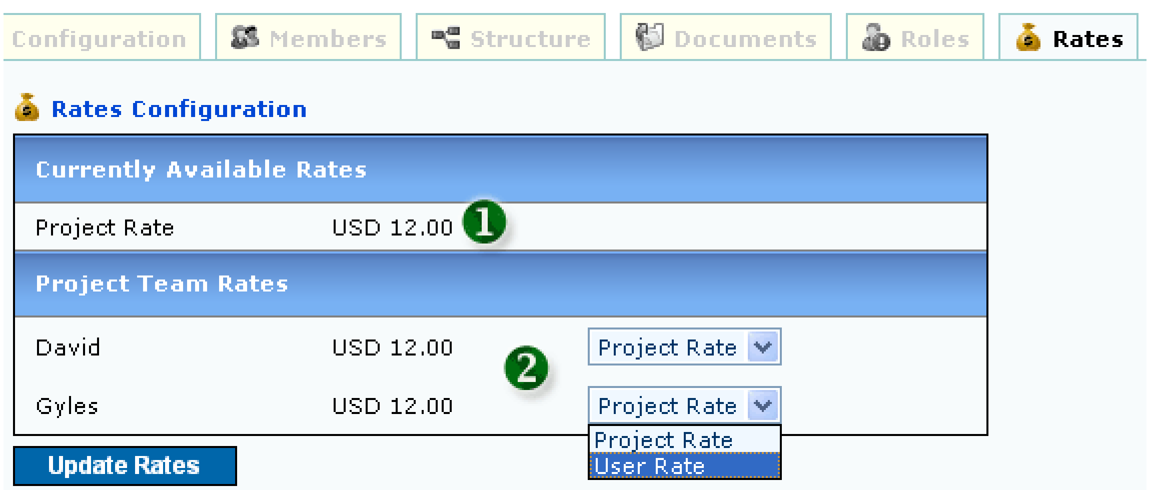


Figure 11: Project Rates

1. **DEFAULT PROJECT RATE:** Changeable in Project Configuration
2. **AVAILABLE RATES:** More rates can be added via Project Roles

2.2.6 Project Notes

Click the " **Notes** " Tab to Share Notes regarding the Project

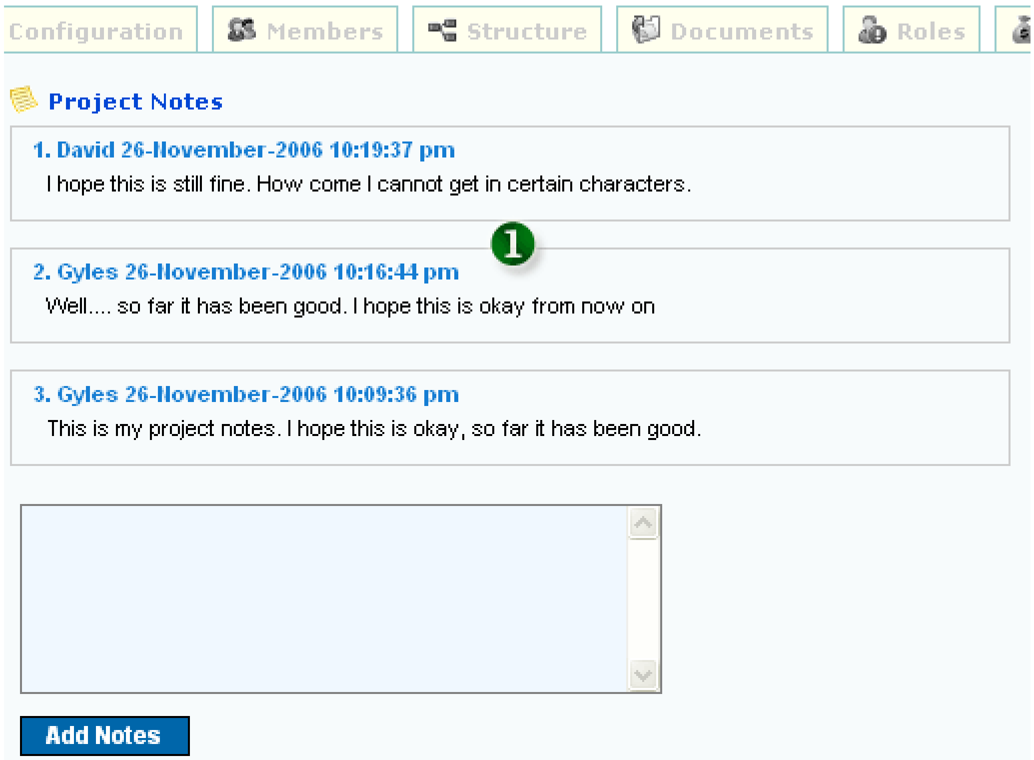


Figure 12: Project Notes

1. CURRENT PROJECT NOTES

- Project Notes cannot be deleted or updated as it serves as a 'Log' for every Project Team Members
- All Team Members who have access to the Project can add Notes

2.3 Adding New Task for Project

Click the "Add New Task" Button in the Project Update page to add New Task

2.3.1 Task Configuration

Click the " **New Task Configuration**" Tab to Update Task Configuration

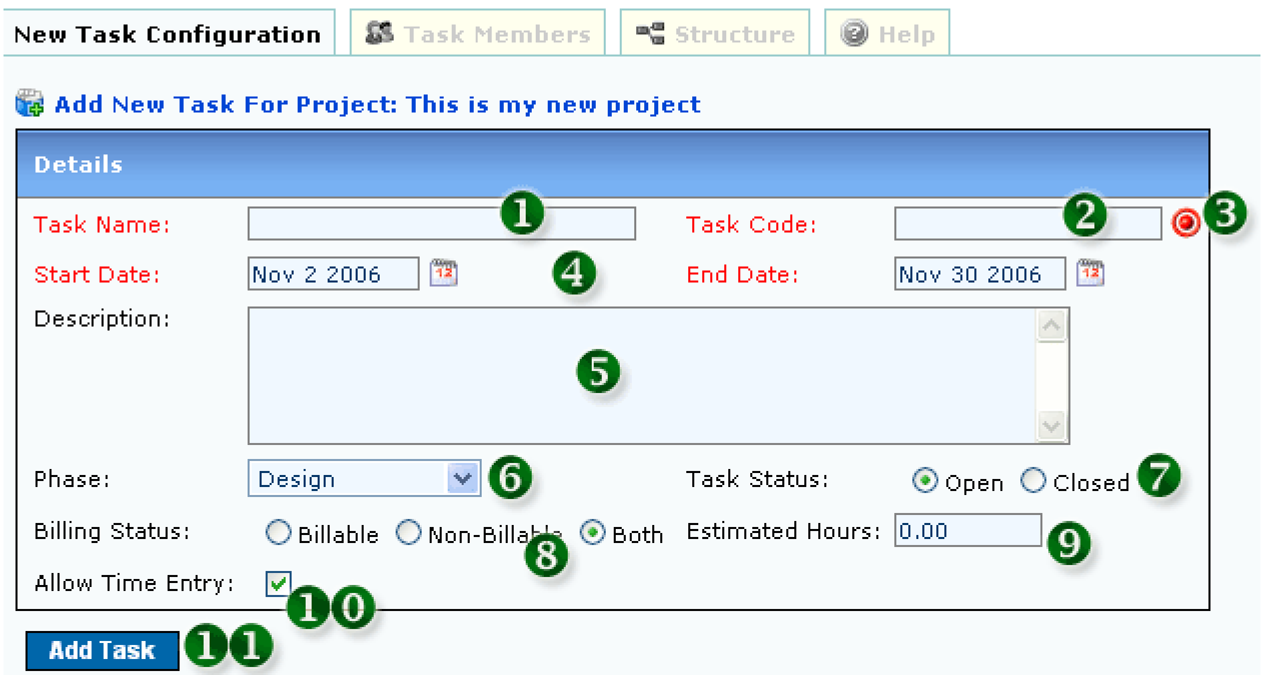


Figure 13: Adding New Task for Project

1. TASK NAME: Only one unique Task Name can exist within the Project

2. TASK CODE: Only one unique Task Code can exist within the Project

3. GENERATE TASK CODE: Task Code will be generated automatically. The rules of Task Code auto-generation naming convention can be changed by Admin

4. START AND END DATE

5. TASK DESCRIPTION

6. TASK PHASES: Phase can be added/updated by Administrator

7. TASK STATUS: Open or Closed

8. BILLING STATUS: Enable Billable or Non-Billable Options in Timesheet

9. ESTIMATED TOTAL TASK HOURS

10. ALLOW TIMESHEET ENTRY FOR THIS TASK

11. PROCEED WITH ADDING THIS TASK

2.3.2 Task Members

Click the “ **Task Members** ” Tab to Update Task Team Members

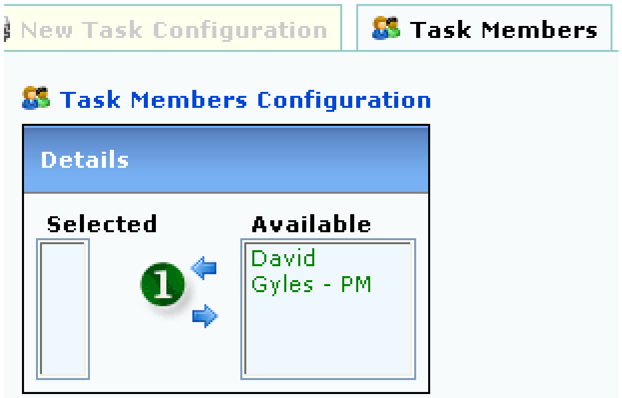


Figure 14: Task Members

1. ADD TASK MEMBERS:

- List of Available Task Members will be derived automatically from the Project’s Team Members
- Task Members assignments work independently from Project. For example: if a new Team Member is added in the Project, it will not automatically added to its Tasks unless Propagated. This is to maintain Team Members independence so that Project Managers can assign certain Tasks to certain Team Members in the Project only without affecting others.

2.3.3 Task Structure

Click the “ **Structure** ” Tab to View the Current Project and Task Structure

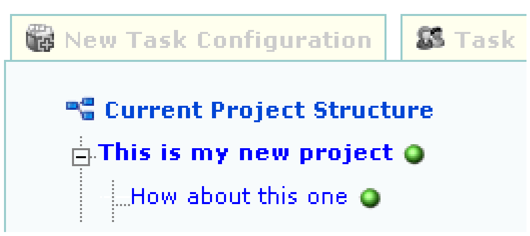


Figure 15: Current Project and Task Structure

2.4 Updating Tasks

System will automatically move to Update Task Mode after successful Task Addition. Tasks can also be Updated via links in the List Project section (**refer Listing Projects at 2.6**)

2.4.1 Task Configuration

Click the " **Configuration**" Tab to Update Task Configuration

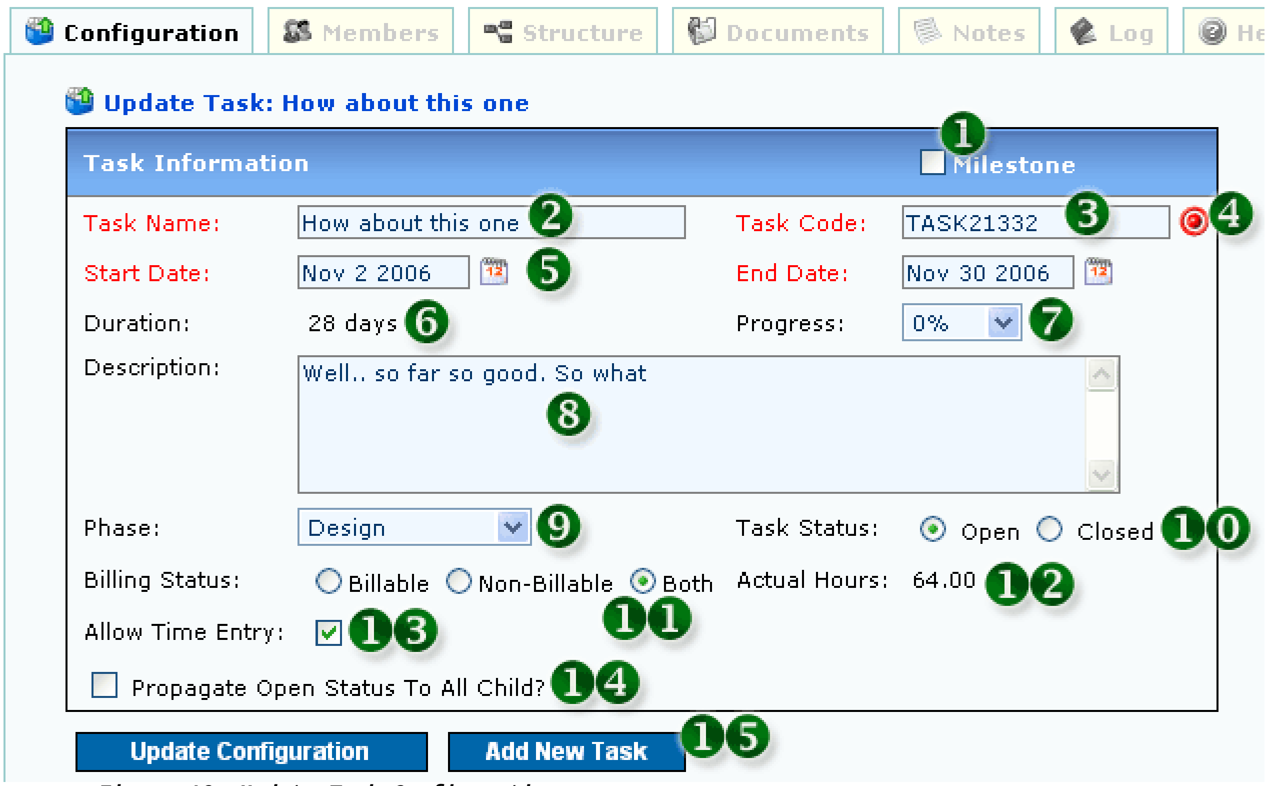


Figure 16: Update Task Configuration

1. **MARK TASK AS MILESTONE**
2. **TASK NAME:** Only one unique Task Name can exist within the Project
3. **TASK CODE:** Only one unique Task Code can exist within the Project
4. **GENERATE TASK CODE:** Task Code will be generated automatically. The rules of Task Code auto-generation naming convention can be changed by Admin
5. **START AND END DATE**
6. **TASK DURATION:** Days from Start Date and End Date
7. **PROGRESS PERCENTAGE**
8. **TASK DESCRIPTION**

9. TASK PHASES SELECTION: Phase can be added/updated by Administrator

10. TASK STATUS: Open or Closed

11. TASK BILLING: Billable or Non-Billable Options in Timesheet

12. ACTUAL HOURS AS CALCULATED FROM TIMESHEET

13. ALLOW OR DENY TIMESHEET ENTRY FOR THIS TASK

14. CHECK TO PROPAGATE OPEN STATUS TO ALL SUBTASKS: Only for Tasks with "Open" Status. This will change all Tasks Status to "Open". Closed Tasks will automatically trigger a "Closed" status in all SubTasks

15. CLICK TO ADD NEW SUBTASK WITH THIS TASK AS PARENT

2.4.2 Task Members

Click the " **Members** " Tab to Update Task Members

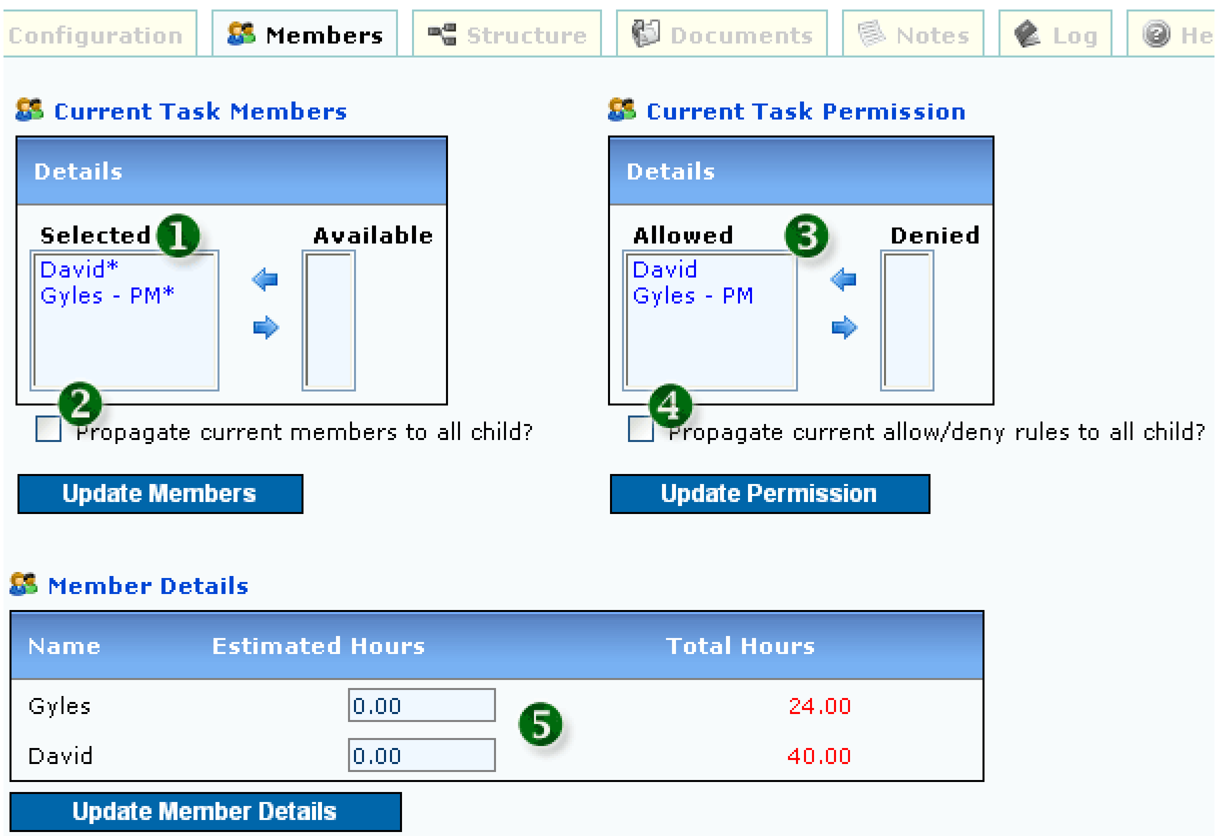


Figure 17: Updating Task Members

1. CURRENT TASK MEMBERS: Members with '*' cannot be removed as they have timesheet hours already charged to task. Members removed from task members will be automatically removed in

SubTasks as well. Members added will NOT be automatically added in SubTasks but need to be Propagated

2. PROPAGATE MEMBERS TO SUBTASKS AS WELL: Members added in tasks can be automatically added to SubTasks by checking this box and clicking “Update Members”

3. ALLOW / DENY CURRENT TEAM FROM ACCESSING TASK

4. PROPAGATE ALLOW / DENY CURRENT TEAM PERMISSION TO SUBTASKS AS WELL

5. TASK MEMBERS' ESTIMATED VS ACTUAL HOURS

2.4.3 Task Structure

Click the “ **Structure** ” Tab to Update Task Members

Figure 18: Task Structure

1. CLICK LINK TO GO TO DIFFERENT TASKS: The link in red is the current Task selection

2.4.4 Task Documents

Click the “ **Documents** ” Tab to View Task Documents

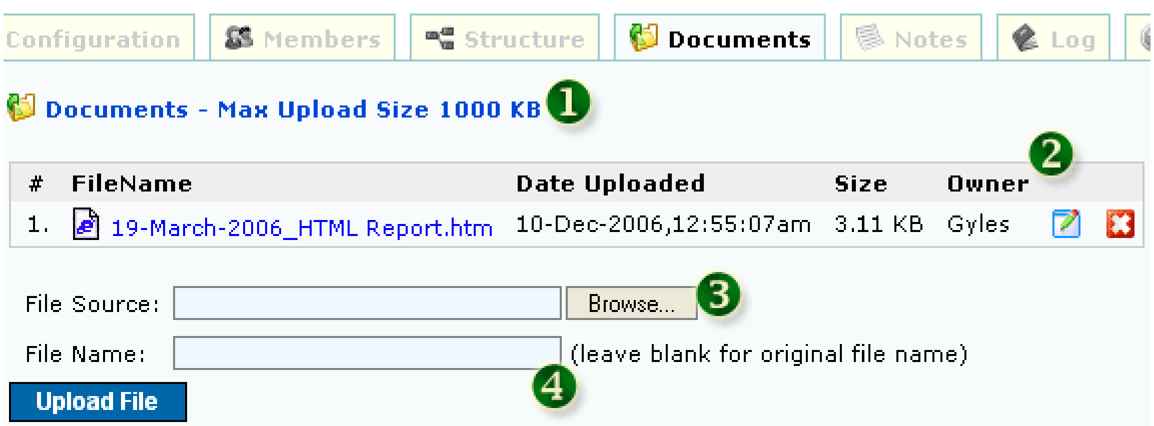


Figure 19: Task Attachments

1. CURRENT ALLOWABLE UPLOAD SIZE: Changeable by Admin

2. UPLOADED FILES INFORMATION: Download, Rename and Delete Files. All Task Team Members can upload files to Task. Only the documents owner can update or delete documents.

3. SELECT FILE TO UPLOAD: Files with size that is more than allowable will be ignored during upload

4. RENAME UPLOADED FILE: File will assume the original name if there is no value in this field

2.4.5 Task Notes

Click the “ **Notes** ” Tab to View Task Notes

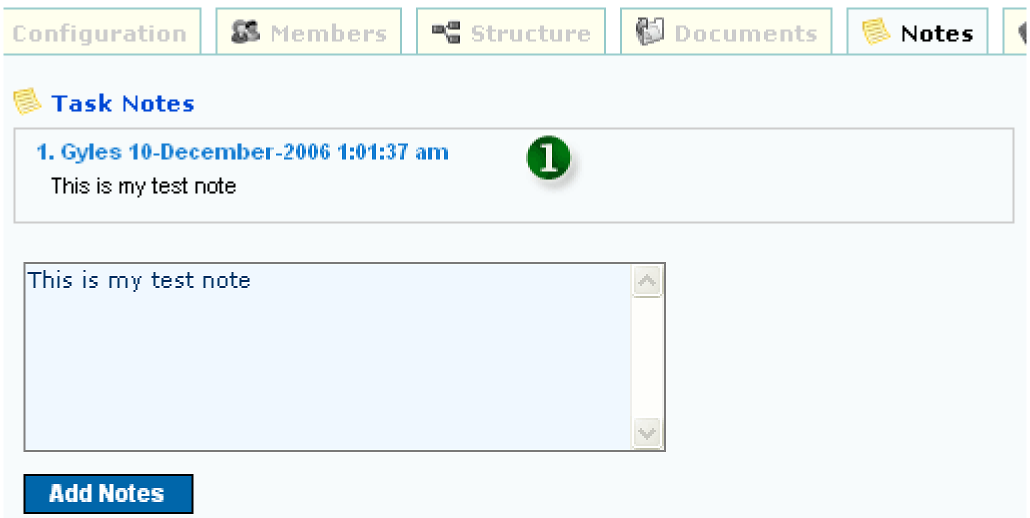


Figure 20: Task Notes

1. CURRENT TASK NOTES

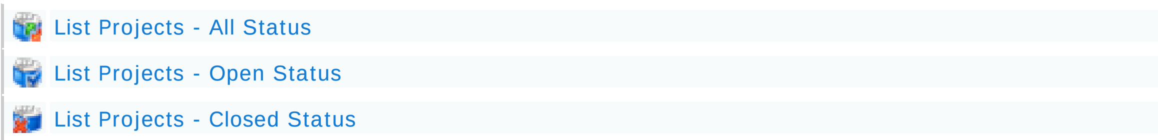
- Task Notes cannot be deleted or updated as it serves as a ‘Log’ for every Task Team Members
- All Team Members who have access to the Task can add Notes

2.5 Adding New SubTask for Task

Click the “ **Add New Task** ” Button in the Task Update page to add New SubTask

- Adding new Subtask procedure is Similar to Adding New Task For Projects

2.6 Listing Projects



Click the " **Projects List**" Tab to List Projects

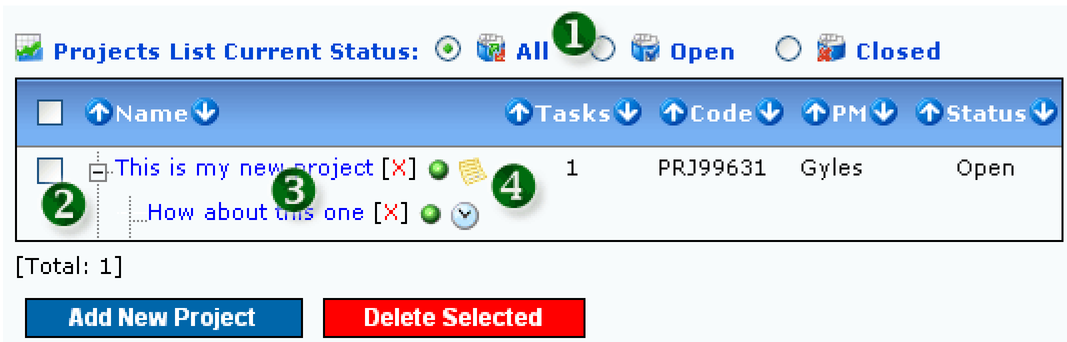
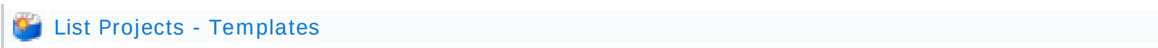


Figure 21: List Projects Page

1. **SELECT PROJECT STATUS: All / Open / Closed /**
2. **CHECK AND CLICK "DELETE SELECTED" TO DELETE PROJECT**
3. **LINK TO PROJECT EDIT / VIEW:** Depending on Project Permission
4. **PROJECT STATUS ICONS**
   - [X] Delete Project / Task
   - Open Projects
   - Closed Projects
   - Timesheet Entry Permitted
   - Timesheet Entry Denied
   - Projects With Attachment
   - Projects With Notes

2.7 Listing Templates



Click the “ **Project Templates List**” Tab to List Templates. Any Project can be made a Template by checking the “Enable Template” checkbox at the Project Edit page.

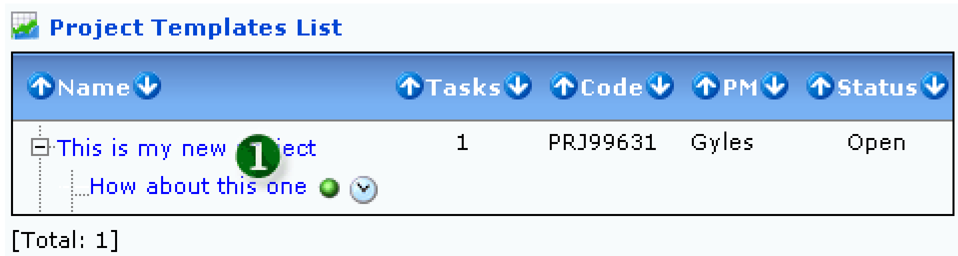


Figure 22: Project Templates List

1. CLICK LINK TO EDIT TEMPLATE

2.7.1 Template Editor

Click the “ **Project Template Editor** ” Tab to Update Templates. By clicking the Link at the Templates Listing, the Project Template Editor will be loaded automatically

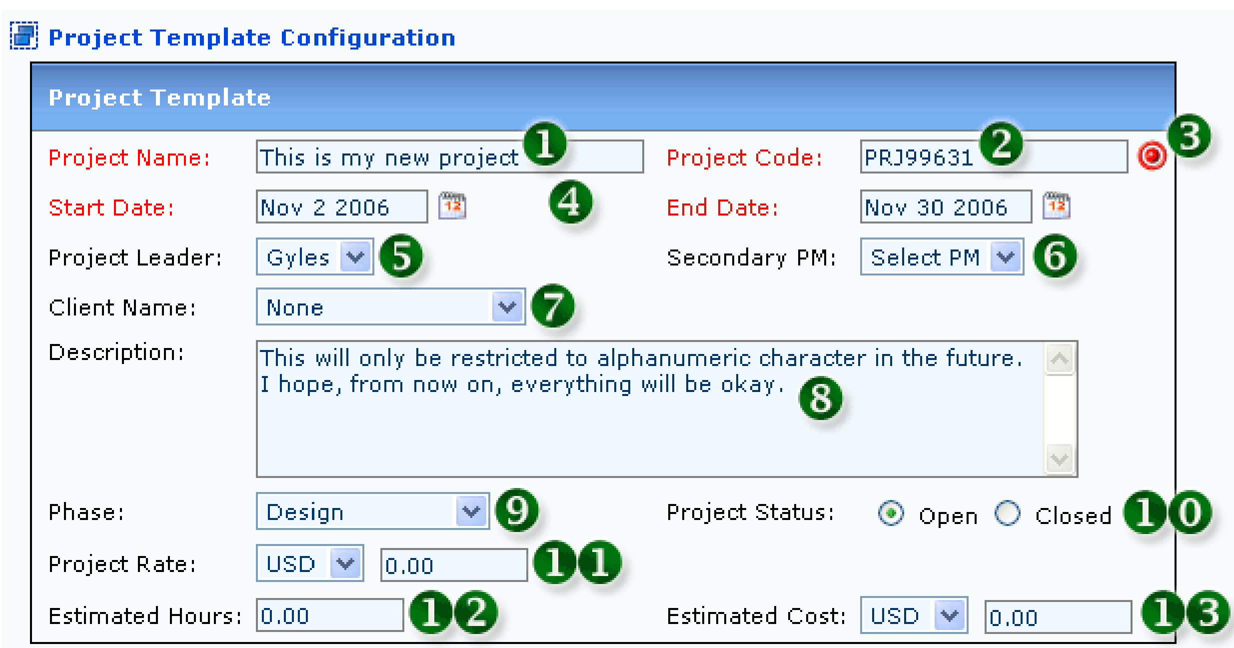


Figure 23: Project Template Editor

1. PROJECT NAME: Only one unique Project Name can exist within the system

2. PROJECT CODE: Only one unique Project Code can exist within the system

3. PROJECT CODE GENERATOR: Click to automatically generate Project Code. The rules of Project Code auto-generation naming convention can be changed by Admin

4. START AND END DATE

5. PROJECT MANAGER SELECTION: Listed Users with Project Manager permission only

6. SECONDARY PROJECT MANAGER SELECTION: Listed Users with Project Manager permission only

7. PROJECT CLIENT

8. PROJECT DESCRIPTION

9. PROJECT PHASES

10. PROJECT STATUS: Open or Closed

11. PROJECT RATE: Default Project Rate per hour charged in Timesheet.

12. ESTIMATED TOTAL PROJECT HOURS

13. ESTIMATED TOTAL PROJECT COSTS

3. Timesheet

Click the “TIMESHEET” icon at the top menu to access the Timesheet Module.

Figure 24: Timesheet Top Menu

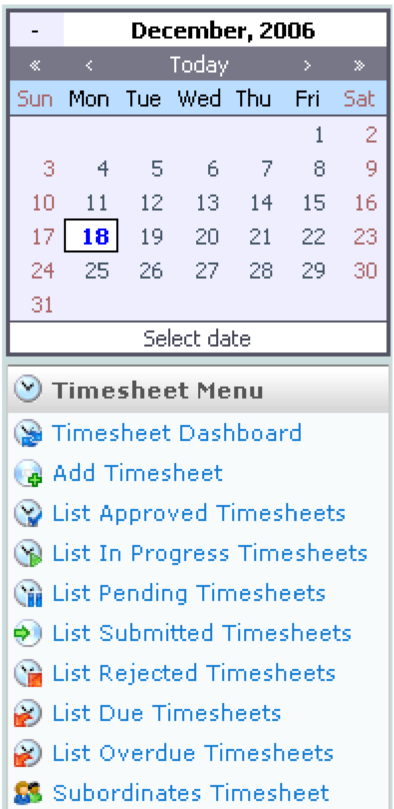


Figure 25: Timesheet Left Side Menu

3.1 Timesheet Dashboard

Timesheet Dashboard

Click the " **Dashboard**" Tab to View Timesheet Dashboard. Click on the [List All] link to go to its the specific page

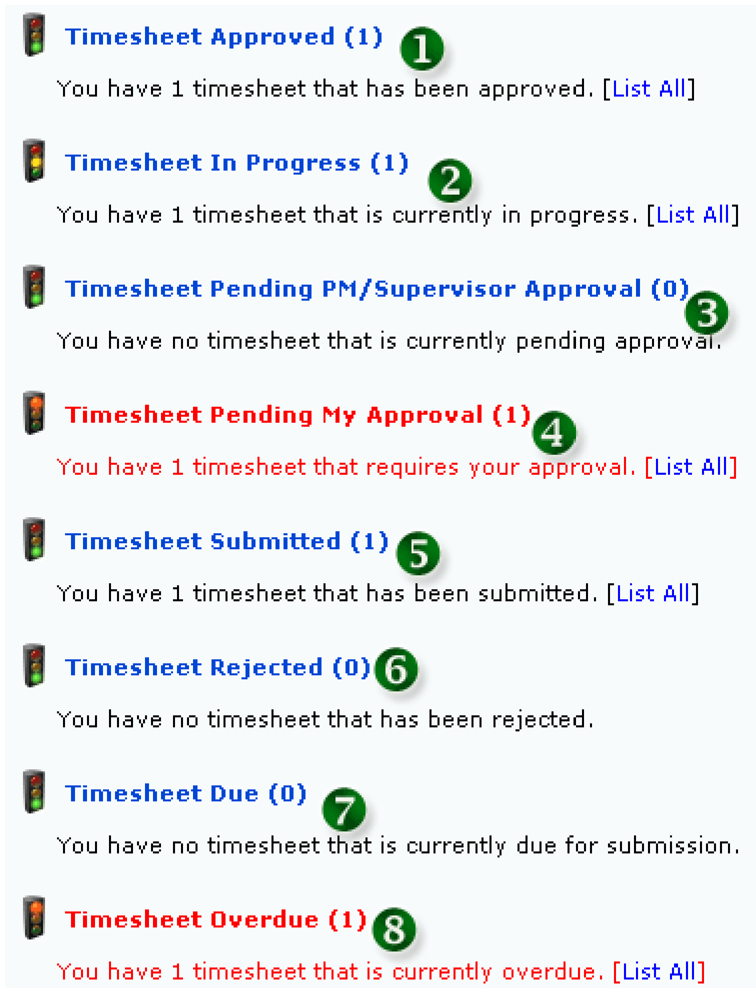
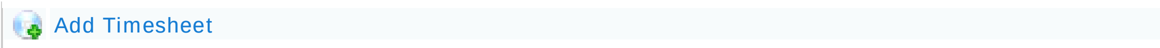


Figure 26: Timesheet Dashboard Page

1. **ALL APPROVED TIMESHEETS ARE LISTED HERE**
2. **ALL IN-PROGRESS TIMESHEETS ARE LISTED HERE**
3. **ALL SUBMITTED TIMESHEETS ARE LISTED HERE**
4. **ALL SUBMITTED TIMESHEETS PENDING MY APPROVAL ARE LISTED HERE**
5. **ALL PENDING APPROVAL TIMESHEETS ARE LISTED HERE**
6. **ALL REJECTED TIMESHEETS ARE LISTED HERE**
7. **ALL DUE TIMESHEETS ARE LISTED HERE**
8. **ALL OVERDUE TIMESHEETS ARE LISTED HERE**

3.2 Adding Timesheet



Click the “ **Add / Update Hours**” Tab to start Adding Timesheet.

Figure 27: Empty Timesheet Page

1. **CURRENT TIMESHEET WEEK**
2. **CLICK TO ADD TIMEOFF**
3. **CLICK TO IMPORT TASKS FROM PREVIOUS WEEK:** Only Tasks and Timeoff titles will be imported. Hours will not be imported. This button will only appear if there are values in previous week’s timesheet.

3.2.1 Adding Timeoff Tasks

Click the “Add TimeOff” Button to add Timeoff Tasks.

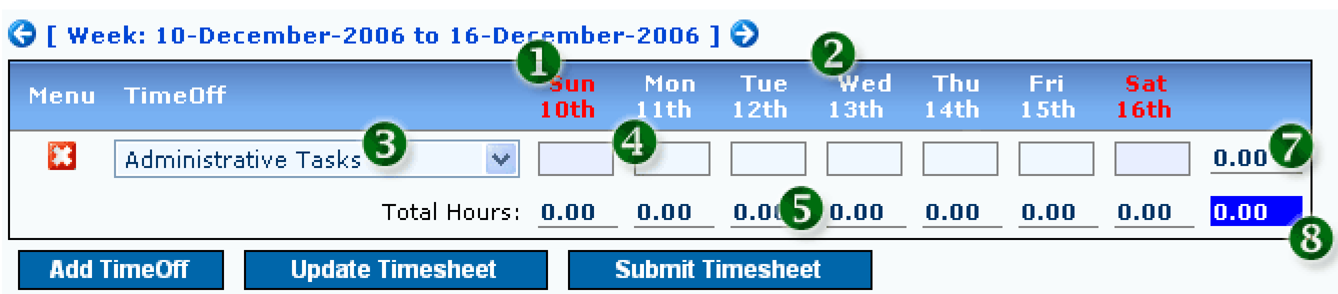


Figure 28: Timeoff Tasks Added

1. **OFF DAY:** Off Day as defined in the system (can be changed in User Preference)
2. **WORKING DAY**
3. **TIMEOFF TYPE**
4. **TOTAL HOURS:** Total hours for specific day and task
5. **TOTAL DAILY HOURS:** Total hours for specific day
7. **TOTAL TASK HOURS:** Total hours for specific task
8. **GRAND TOTAL HOURS:** Total hours for the whole week

3.2.2 Adding New Tasks

Click the “ **Add / Update Tasks**” Tab to add new Tasks.

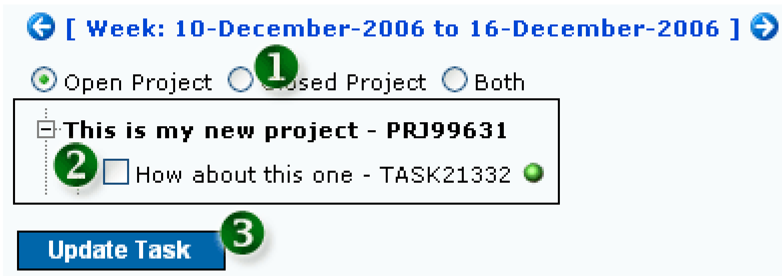


Figure 29: Adding New Task

1. **PROJECT STATUS:** Open / Closed / Both
2. **TASK SELECTION:** Check to select Task
3. **UPDATE TASK:** Click to Update Task in Timesheet

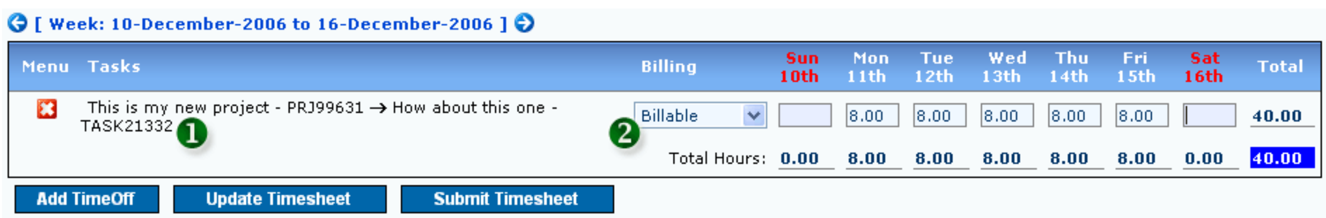


Figure 30: Adding New Task

1. **SELECTED TASK:** Current task selection
2. **BILLABLE / NON BILLABLE SELECTION**

3.2.3 Time-In, Time-Out and Comments

Click on the hours box to enable the "Time-In, Time-Out and Comments" feature for the particular Task and it's related day. For changes in the "Time-In and Time-Out", the hours in the Hours box will change accordingly.

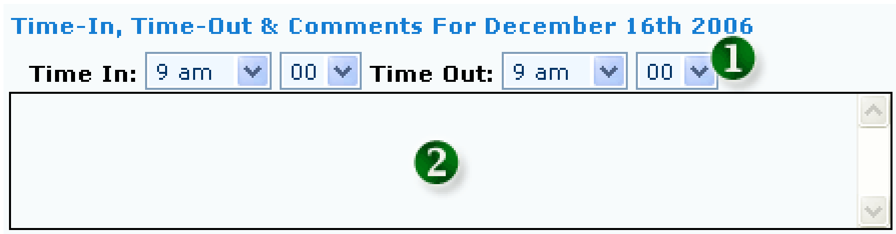


Figure 31: Time-In, Time-Out and Comments

1. **TIME-IN / TIME-OUT:** Select daily time-in / time-out updates
2. **ADD COMMENTS**

3.2.4 Updating Timesheet

Timesheet can be updated by clicking the "Update Timesheet" button anytime.

3.2.5 Submitting Timesheet

Timesheet can be submitted by clicking the "Submit Timesheet" button. These rules have to be adhered before Submission is accepted:

- Number of Minimum Hours Per Working Day (as defined by the Administrator)
- Number of Minimum Hours Per Week (as defined by the Administrator)
- No Tasks / Timeoffs with Zero Hours

These rules can be configured per user by the Administrator

3.2.6 Traversing The Timesheet

Timesheet week can be changed by clicking the Arrow Button at the Week Display or by Clicking Directly at the Calendar

Figure 32: Timesheet Traversing

3.2.7 Approval Rules

Click the " My Approval Rules " Tab to View My Timesheet Approval Rules.

Figure 33: My Timesheet Current Approval Rules

Task Approval: Approval rules for Task Specific submission.
Options (Configurable per User by Administrator):

1. Project Manager (default)
2. Secondary Project Manager (default)
3. Supervisor
4. Secondary Supervisor
5. Administrator
6. System

Timeoff Approval: Approval rules for Timeoff Specific submission.
Options (Configurable per User by Administrator):

1. Supervisor (default)
2. Secondary Supervisor (default)
3. Administrator
4. System

Overall Approval: Approval rules for Overall Weekly submission.
Options (Configurable per User by Administrator):

1. Supervisor
2. Secondary Supervisor
3. Administrator
4. System (default)

3.2.8 Approval Rules Definition

When a Timesheet is Submitted:

- System will verify for Tasks (refer **Task Approval at 3.2.7**):
    1. If User is the Same as Task's Project Manager, Auto Approve. If not, Pending
    2. If User is the Same as Task's Secondary PM, Auto Approve. If not, Pending
    3. If User is his/her own Supervisor, Auto Approve. If not, Pending
    4. If User is his/her own Secondary Supervisor, Auto Approve. If not, Pending
    5. If User is the Administrator, Auto Approve. If not, Pending
    6. System Auto Approve.

- System will verify for Timeoff (**refer Timeoff Approval at 3.2.7**):
    1. If User is his/her own Supervisor, Auto Approve. If not, Pending
    2. If User is his/her own Secondary Supervisor, Auto Approve. If not, Pending
    3. If User is the Administrator, Auto Approve. If not, Pending
    4. System Auto Approve.

- System will verify for Overall (**refer Overall Approval at 3.2.7**):
    1. If User is his/her own Supervisor, Auto Approve. If not, Pending
    2. If User is his/her own Secondary Supervisor, Auto Approve. If not, Pending
    3. If User is the Administrator, Auto Approve. If not, Pending
    4. System Auto Approve.
    - **Please take note that Auto-Approval for Overall will ONLY HAPPEN after Tasks and Timeoff have been Approved earlier.**

3.3 Listing Approved Timesheets

List Approved Timesheets

Click the " **Approved Timesheets List**" Tab to List Approved Timesheets.

Week Start	Projects	TimeOff	Total Hours	Status
10-December-2006	1	0	0.00	(0) (0) (0)
03-December-2006	0	1	0.00	(0) (0) (0)
26-November-2006	1	1	40.00	(0) (0) (0)

[Total: 3]

☐ Search Records

Figure 34: Approved Timesheets Listing

1. **CLICK LINK TO GO TO TIMESHEET**
2. **CURRENT STATUS:** Number of Pending / Approve / Reject Tasks

3.4 Listing In-Progress Timesheets

List In Progress Timesheets

Click the " **In Progress Timesheets List**" Tab to List In-Progress Timesheets.

Week Start	Projects	TimeOff	Total Hours	Status
10-December-2006	1	0	0.00	(0) (0) (0)
03-December-2006	0	1	0.00	(0) (0) (0)
26-November-2006	1	1	40.00	(0) (0) (0)

[Total: 3]

☐ Search Records

Figure 35: In-Progress Timesheets Listing

1. **CLICK LINK TO GO TO TIMESHEET**
2. **CURRENT STATUS:** Number of Pending / Approve / Reject Tasks

3.5 Listing Pending Timesheets

List Pending Timesheets

Click the " **Pending Timesheets List**" Tab to List Pending Timesheets.

Week Start	Projects	TimeOff	Total Hours	Status
10-December-2006	1	0	0.00	(0) (0) (0)
03-December-2006	0	1	0.00	(0) (0) (0)
26-November-2006	1	1	40.00	(0) (0) (0)

[Total: 3]

Search Records

Figure 36: Pending Timesheets Listing

1. **CLICK LINK TO GO TO TIMESHEET**
2. **CURRENT STATUS:** Number of Pending / Approve / Reject Tasks

3.6 Listing Submitted Timesheets

List Pending Timesheets

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

Week Start	Projects	TimeOff	Total Hours	Status
10-December-2006	1	0	0.00	(0) (0) (0)
03-December-2006	0	1	0.00	(0) (0) (0)
26-November-2006	1	1	40.00	(0) (0) (0)

[Total: 3]

Search Records

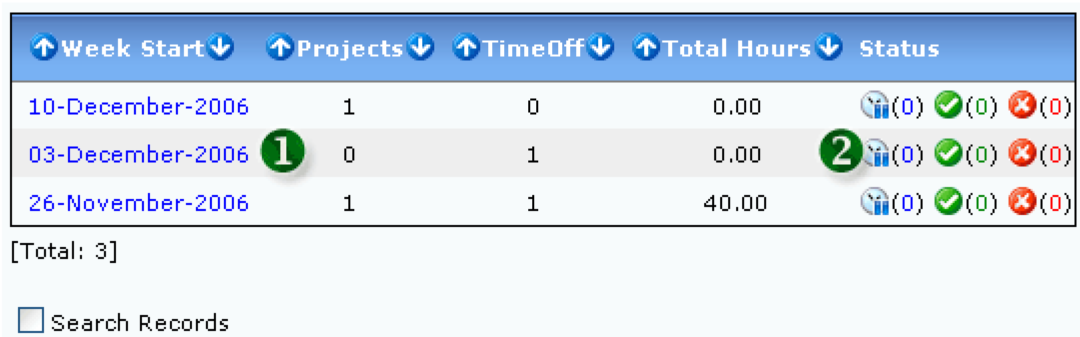
Figure 37: Submitted Timesheets Listing

1. **CLICK LINK TO GO TO TIMESHEET**
2. **CURRENT STATUS:** Number of Pending / Approve / Reject Tasks

3.7 Listing Rejected Timesheets

List Rejected Timesheets

Click the “ **Rejected Timesheets List**” Tab to List Rejected Timesheets.



Week Start	Projects	TimeOff	Total Hours	Status
10-December-2006	1	0	0.00	(0) (0) (0)
03-December-2006	0	1	0.00	(0) (0) (0)
26-November-2006	1	1	40.00	(0) (0) (0)

[Total: 3]

Search Records

Figure 38: Rejected Timesheets Listing

1. **CLICK LINK TO GO TO TIMESHEET**
2. **CURRENT STATUS:** Number of Pending / Approve / Reject Tasks

3.8 Listing Due Timesheets

List Due Timesheets

Click the “ **Due Timesheets List**” Tab to List Due Timesheets.

Overdue Timesheets List

Overdue Timesheets List

Week Start
10-December-2006
03-December-2006
26-November-2006

[Total: 3]

Search Records

Figure 39: Due/Overdue Timesheets Listing

1. **CLICK LINK TO GO TO TIMESHEET**

3.9 Listing OverDue Timesheets

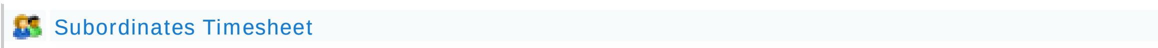
List Overdue Timesheets

Click the “ **Overdue Timesheets List**” Tab to List Overdue Timesheets.

Figure 40: Due/Overdue Timesheets Listing

1. CLICK LINK TO GO TO TIMESHEET

3.10 Submitting Subordinates Timesheets



Supervisor can submit timesheets on behalf of their subordinates via this feature.

3.10.1 Listing Subordinates Timesheets

Click the "**Subordinates Timesheets List**" Tab to List Subordinates' Timesheets.

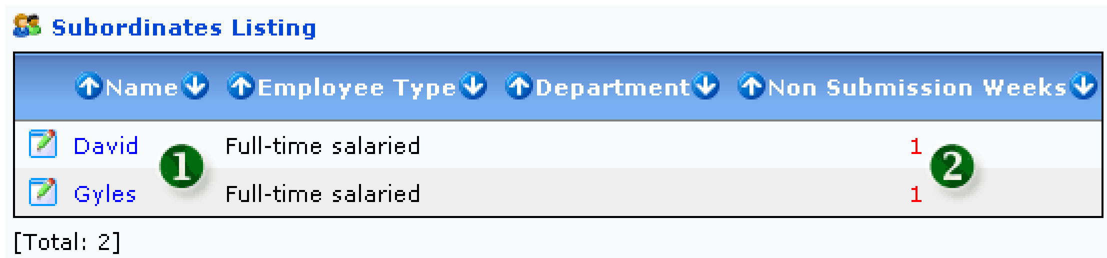


Figure 41: Subordinates Timesheet Status Listing

1. **CLICK LINK TO EDIT SUBORDINATE'S TIMESHEET:** Click the link to go directly to subordinates' timesheet edit mode. **Refer Editing Subordinate's Timesheet at 3.10.2** for more information
2. **OVERDUE WEEK(S):** The number of weeks subordinates' timesheet is overdue

3.10.2 Editing Subordinate's Timesheets

Click the Name Link in Figure 41 Edit Subordinates' Timesheets. **Refer to Add Timesheet Page at 3.2** for more detailed Timesheet Operation

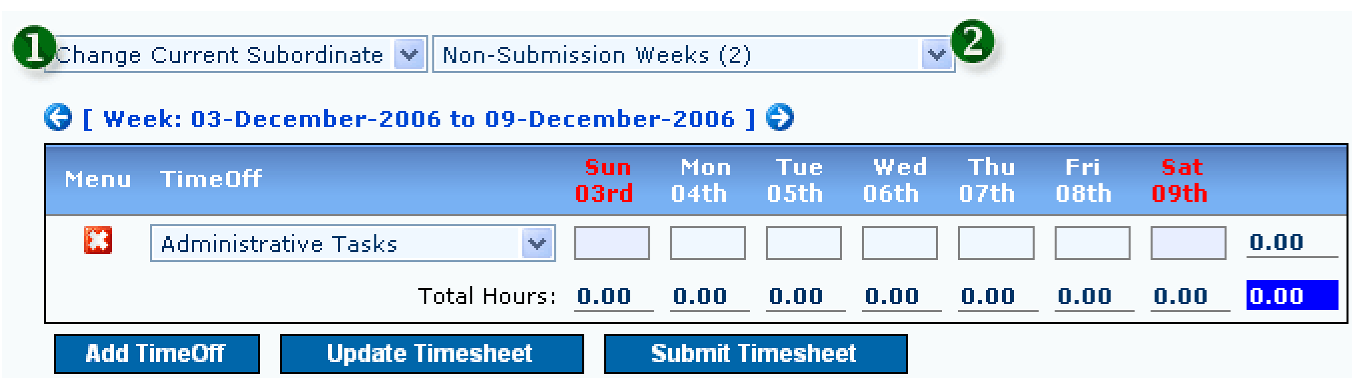


Figure 42: Subordinate's Timesheet Edit Page

1. **CHANGE TO DIFFERENT SUBORDINATE**
2. **CHANGE TO DIFFERENT WEEK**

3.11 Submitted Timesheet Mode

Whenever a Timesheet is submitted successfully, User will enter the Timesheet Submitted Mode automatically. Most of the Submitted Mode Features are similar to the **Add Timesheet Mode at 3.2**.

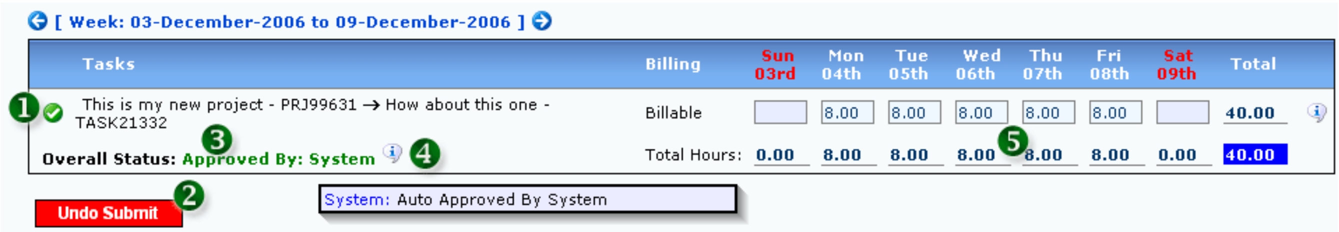


Figure 43: Timesheet Submitted Page

1. CURRENT STATUS: The current status of the Task / Timeoff (Approved / Pending / Rejected)

- Approve
- Pending
- Rejected

2. UNDO SUBMISSION: Click "Undo Submit" to Undo the timesheet submission. Page will be redirected to Update Timesheet Mode

3. OVERALL STATUS: The overall status of the Task / Timeoff (Approved / Pending / Rejected)

- Approve
- Pending
- Rejected

4. COMMENT BOX:

- Mouseover the Comment Box icon to show the comment

5. DAILY HOURS: Total daily hours

4. Approvals

Click the APPROVALS icon at the top menu to access the Approvals Module.

Figure 44: Approvals Top Menu

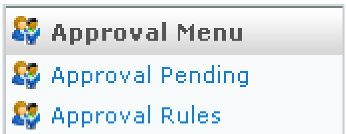


Figure 45: Approvals Left Side Menu

4.1 Approval Pending

Approval Pending

Click the " **Task Approval**" Tab to List Approvals for Timesheets Tasks.

Click the " **Timeoff Approval** " Tab to List Approvals for Timesheets Timeoff.

Click the " **Overall Approval** " Tab to List Approvals for Overall Timesheets.

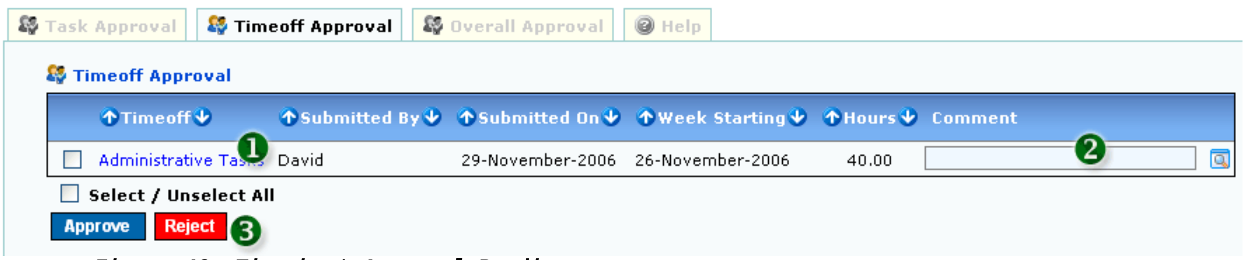


Figure 46: Timesheet Approval Pending

1. CLICK TO VIEW DETAILED TIMESHEET
2. ADD COMMENTS FOR APPROVAL / REJECTION
3. APPROVE OR REJECT BUTTON

1. **Task Approval:** Approval for Task Specific submission.
    1. Select specific checkbox to select related Task
    2. Click on link to view detailed information
    3. Enter necessary comments (Not Mandatory)
    4. Click Approve or Reject button to proceed

2. **Timeoff Approval:** Approval for Timeoff Specific submission.
    1. Select specific checkbox to select related Timeoff
    2. Click on link to view detailed information
    3. Enter necessary comments (Not Mandatory)
    4. Click Approve or Reject button to proceed

3. **Overall Approval:** Approval for Overall Weekly submission.
    1. Select specific checkbox to select related Timesheet
    2. Click on link to view detailed information
    3. Enter necessary comments (Not Mandatory)
    4. Click Approve or Reject button to proceed

Refer 3.2.8 Approval Rules Definition for more information on Approval Rules

4.2 Approval Rules

Approval Rules

Click the “ **Current Settings**” Tab to see your Current Approval Rules.

Figure 47: My Current Approval Rules

1. **Task Approval:** Approval rules for Task Specific submission. Available Options:
    1. Project Manager (default)
    2. Secondary Project Manager (default)
    3. Supervisor
    4. Secondary Supervisor
    5. Administrator
    6. System

2. **Timeoff Approval:** Approval rules for Timeoff Specific submission. Available Options:
    1. Supervisor (default)
    2. Secondary Supervisor (default)
    3. Administrator
    4. System

3. **Overall Approval:** Approval rules for Overall Weekly submission. Available Options:
    1. Supervisor
    2. Secondary Supervisor
    3. Administrator
    4. System (default)

5. Reports

Click the "REPORT" icon at the top menu to access the REPORT Module.

Figure 48: Report Top Menu

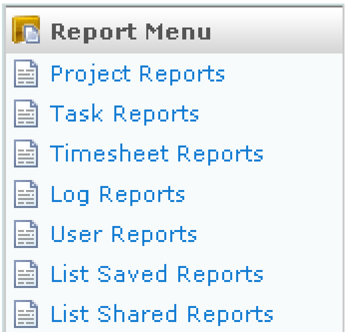
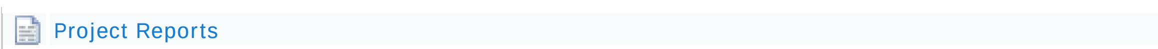


Figure 49: Report Left Side Menu

5.1 Listing Project Reports



Click the " **Available Reports**" Tab to list all available Project Reports.

Figure 50: List Project Reports

All available Project Reports will be listed in this page. Just Click on the Report Name Link to access the report

5.2 Standard Report Configuration

Click the " **Configuration**" Tab to access Standard Report Configuration.

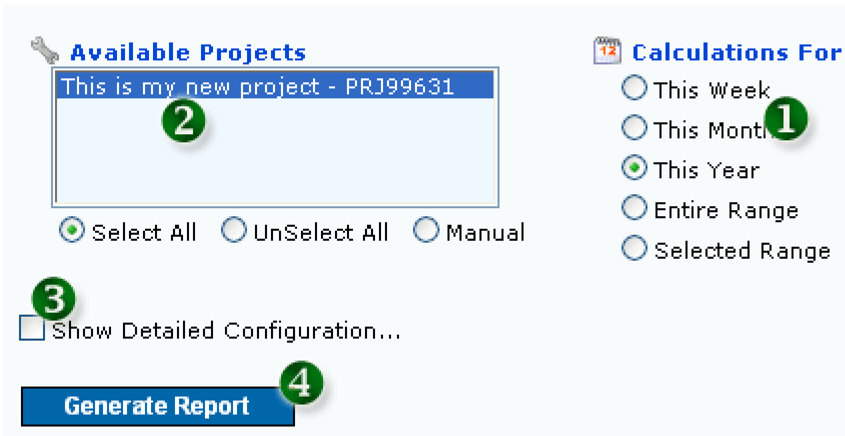


Figure 51: Standard Report Configuration

1. **SELECT DATE RANGE FOR HOURS CHARGED**
2. **SELECT PROJECT(S):** Press CTRL and select Projects for Multiple selection
3. **SHOW MORE CONFIGURATION OPTIONS:** Check the box for Detailed Report Configuration
4. **CLICK BUTTON TO GENERATE REPORT:** Generate Report based on Standard Configuration

5.3 Detailed Report Configuration

Check the "Show Detailed Configuration" (**Refer Figure 51**) to access Detailed Report Configuration.

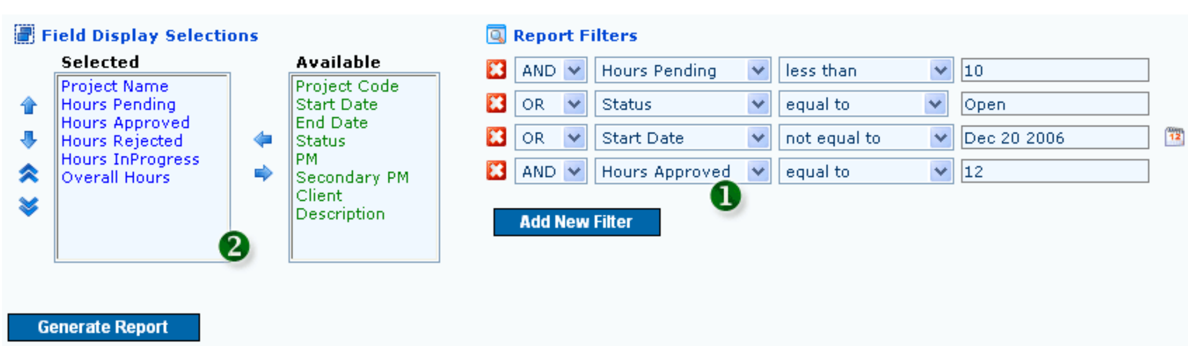


Figure 52: Detailed Report Configuration

1. **REPORT FILTERS:** Select unlimited filters for the report
2. **FIELD DISPLAY SELECTIONS:** Select relevant fields for the report output and arrange the order of appearance. At least one field must be selected (Mandatory)

5.4 Report Result

Click the "Generate Report" Button to Generate Report and Display Report Result.

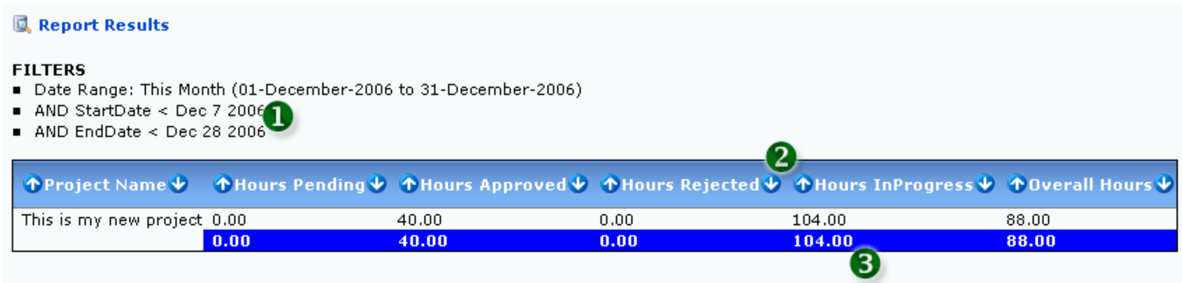


Figure 53: Report Result

1. **FILTERS SELECTED DURING CONFIGURATION**
2. **SORTABLE FIELDS**
3. **GRAND TOTAL**

5.5 Exporting Report Result

Click the "**Export**" Tab to Access Export Options.

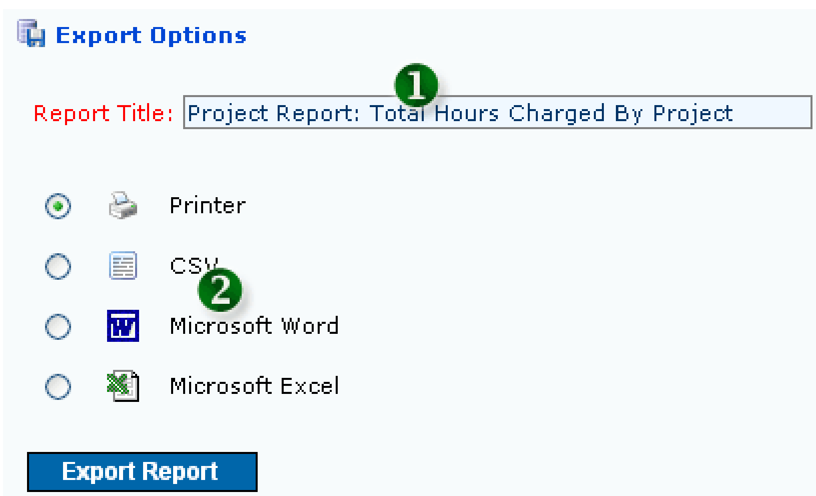


Figure 54: Report Result Export Options

1. **TITLE FOR THE EXPORT:** Report Title that will be displayed in the Exportted Result
2. **EXPORTING FILE FORMAT**

5.6 Emailing Report Result

Click the " Email " Tab to Email Report Result.

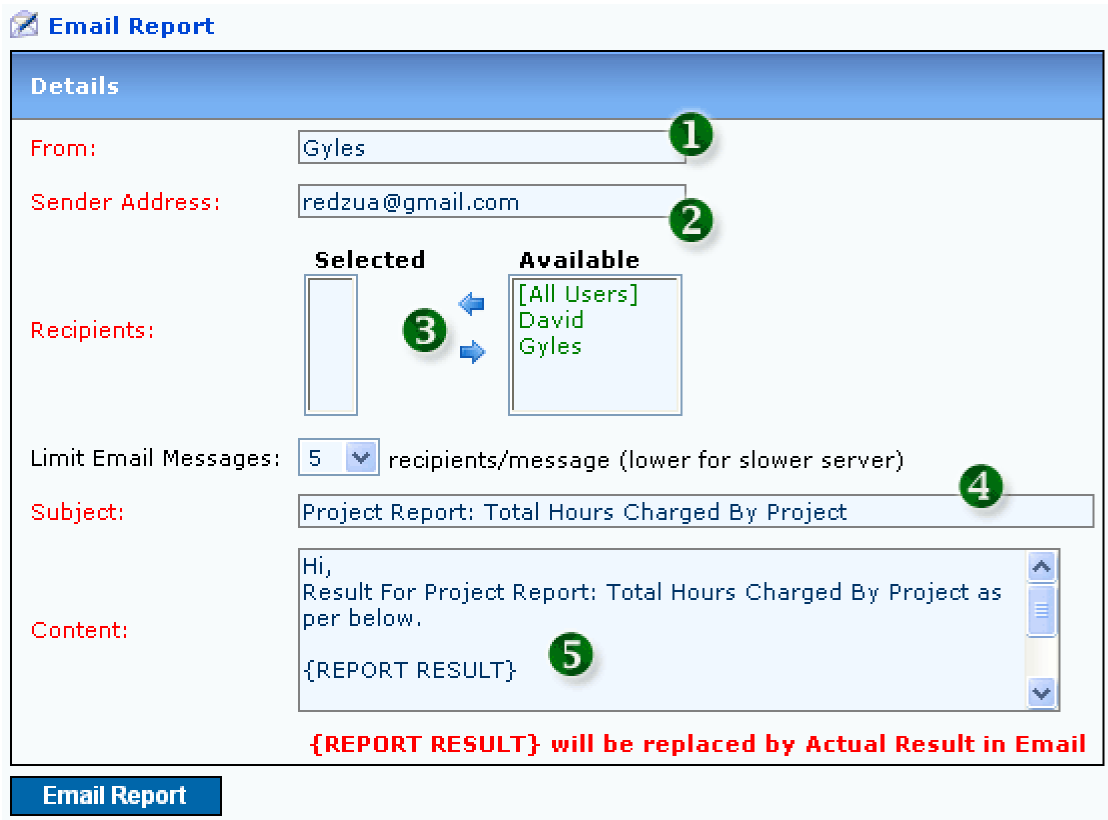


Figure 55: Emailing Report Result

1. **FROM:** Email From (Mandatory)
2. **SENDER ADDRESS:** Email Address of Sender (Mandatory)
3. **RECIPIENTS:** Recipients of the email (Mandatory)
4. **SUBJECT:** Email Subject (Mandatory)
5. **CONTENT:** Email Content (Mandatory). DO NOT REMOVE **{REPORT RESULT}** AS THIS VALUE WILL BE REPLACED WITH ACTUAL REPORT RESULT DURING EMAIL SENDING

5.7 Saving Report Configuration

Click the " **Options** " Tab to access Report Configuration Options. All current report configuration can be saved for later use. This saved configuration will appear in your "List Saved Reports" menu.

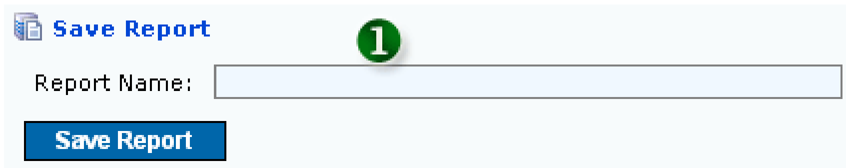


Figure 56: Saving Report Configuration

1. **SAVED REPORT NAME**

5.8 Sharing Report Configuration

Click the " **Options** " Tab to access Report Configuration Options. All current report configuration can be shared with other users. This shared configuration will appear in the user's "List Shared Reports" menu.

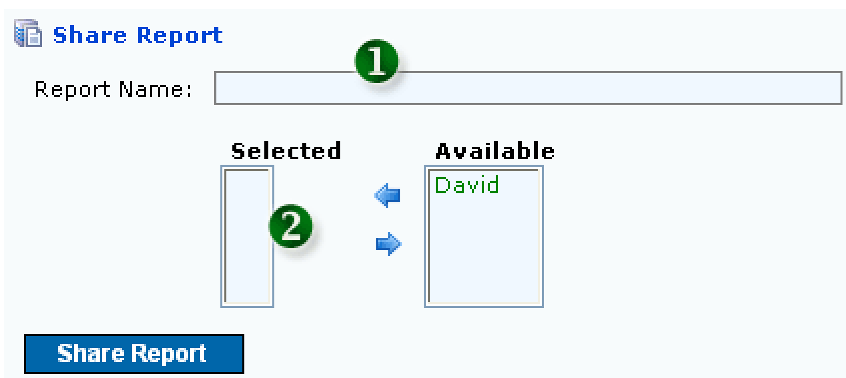


Figure 57: Sharing Report Configuration

1. **SHARED REPORT NAME**
2. **USERS TO SHARE REPORT TO**

5.9 Listing Saved Reports

List Saved Reports

Click the “ **Saved Reports List**” Tab to access Saved Reports.

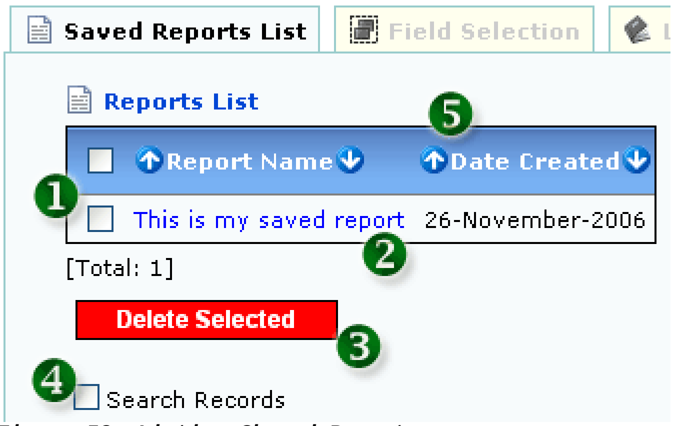


Figure 58: Listing Shared Reports

1. **CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD**
2. **CLICK LINK TO GO TO SAVED REPORT**
3. **DELETE RECORD**
4. **CHECK TO SEARCH RECORDS**
5. **SORTABLE FIELDS**

5.10 Listing Shared Reports

List Shared Reports

Click the “ **Shared Reports List**” Tab to access Shared Reports.

Figure 59: Listing Shared Reports

1. **CHECK AND CLICK "DELETE SELECTED" TO DELETE RECORD**
2. **CLICK LINK TO GO TO SHARED REPORT**
3. **DELETE RECORD**
4. **CHECK TO SEARCH RECORDS**
5. **SORTABLE FIELDS**

5.11 Report Updates

Reports are constantly being added and updated from time to time. Refer to the Help Tab for the most recent information on other reports not mentioned in this Manual.

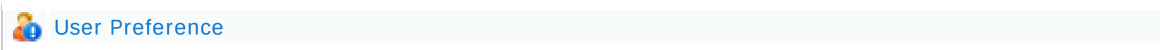
6. Preference

Click the “PREFERENCE” icon at the top menu to access the PREFERENCE Module.

Figure 60: Preference Top Menu

Figure 61: Preference Left Menu

6.1 User Preference



Click the “ **General Preference**” Tab to update your General Preference.

Figure 62: User General Preference

- **Date Format:** Date display preference. All your dates in system will follow this format
- **Name Format:** Name display preference. All your names in system will follow this format
- **Currency Preference:** Default currency. Any currency selection will default to this selected currency symbol
- **List Max Lines Per Page:** All listings in page will have the total list as shown. Listings that exceed the number will overflow to the next page
- **Default Thousand Separator (SPC For Space):** Default separator for thousands
- **Default Decimal Separator (SPC For Space):** Default separator for decimal numbers
- **Task Wrapping:** Tasks will wrap automatically to a new line during Timesheet activities
- **Show Only Open Tasks In Open Projects List?:** Only Tasks with Open status will be shown during Project Selections
- **Expand All Project Tasks By Default?:** Project Treeview to expand or collapse by default

6.1.1 Timesheet Display Preference

Click the “ **Timesheet Display** ” Tab to update your Timesheet Display Preference.

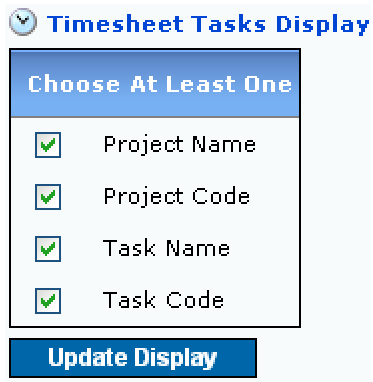


Figure 63: Timesheet Display Preference

- **Project Name:** Display Project Name is Timesheet Window
- **Project Code:** Display Project Code is Timesheet Window
- **Task Name:** Display Task Name is Timesheet Window
- **Task Code:** Display Task Code is Timesheet Window

6.1.2 Off Days Preference

Click the " **Off Days** " Tab to update your Off Days Preference.

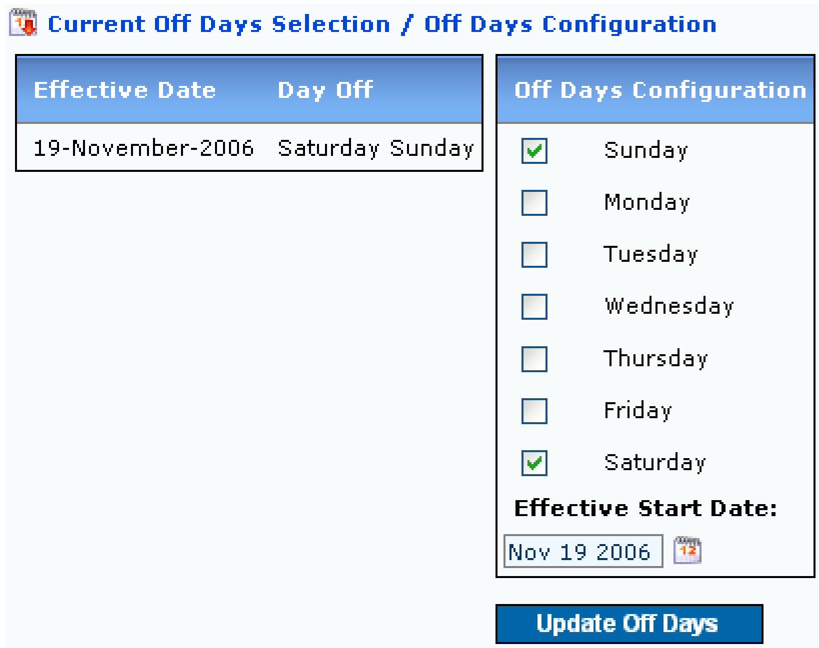


Figure 64: Off Days Preference

- **Off Days Configuration:** Define Your Specific Off Day
- **Effective Start Date:** Effetive Start Date of your Off Day

6.1.3 Changing Your Password

Click the " Password " Tab to Change Your Password.

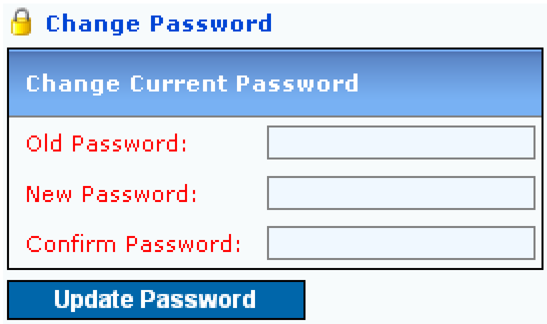


Figure 65: Change Password

- **Old Password:** Your Old Password
- **New Password:** Your New Password
- **Confirm Password:** Confirm Your New Password

6.2 Quicklinks

Click the “ **QuickLinks List**” Tab to Configure your Quicklinks settings.

6.2.1 Adding Quicklinks

Quicklinks will 'remember' your favourite pages in the system by adding it to the Quicklinks Menu on your left. Quiclinks feature is activated by default. For every page that supports Quicklinks, click the “Add Quicklinks” button as per the figure below and the menu on your left will be automatically updated.

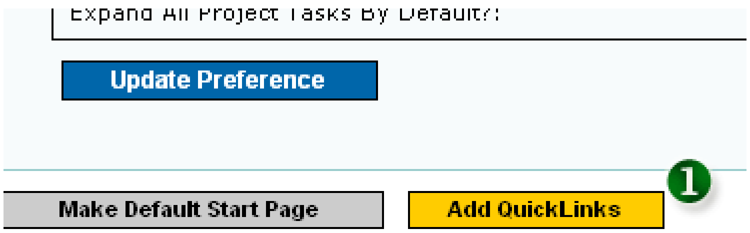


Figure 66: Adding Quicklinks

1. CLICK TO ADD QUICKLINKS

6.2.2 Verifying Quicklinks

After the button is clicked, you can Verify the availability of the page on the Left Hand Quicklinks Menu.

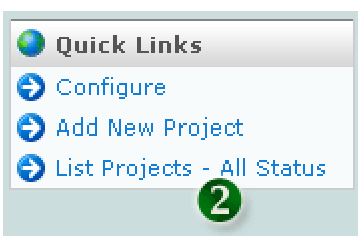


Figure 67: Verifying Quicklinks

2. VERIFY QUICKLINKS ADDED IN THE QUICKLINKS MENU

6.2.3 Removing Quicklinks

To remove the Quicklinks selection, simple click the same button again or remove it from the "Quicklinks List" tab in this page.

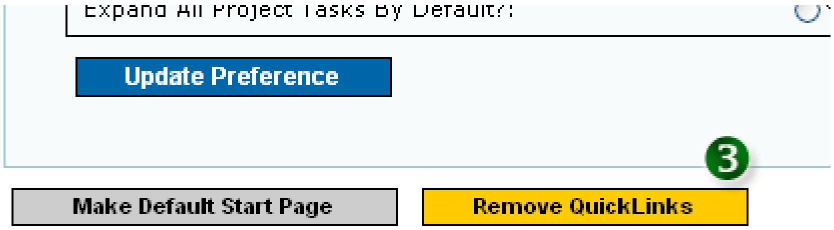


Figure 68: Removing Quicklinks

3. CLICK TO REMOVE QUICKLINKS

7. Value Added Features

7.1 Quicklinks

Refer section 6.2 – “Quicklinks”

7.2 Dynamic Startup Page

You can select any page you prefer as a New Startup Page after Login. At the bottom of participating pages, click the “Make Default Start Page” button.

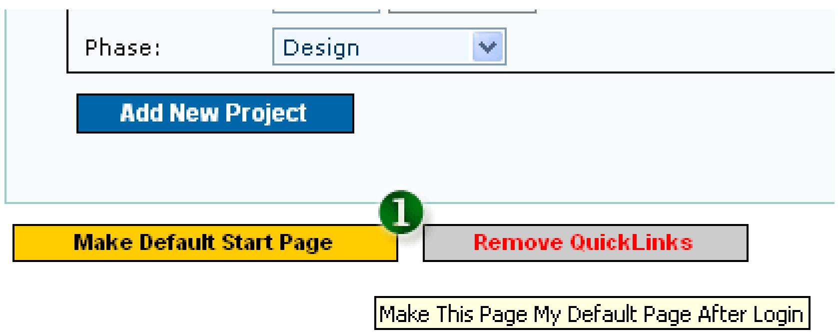


Figure 69: Dynamic Startup Page

1. CLICK BUTTON TO SET DEFAULT STARTUP PAGE

7.3 Help Tab

Help is just around the corner. Just click the " Help " tab to access the Context Help relevant to the page Automatically. Since the Help Tab imports its information via External HTML file, you can also customize and localize this information according to your preference by editing the HTML file.

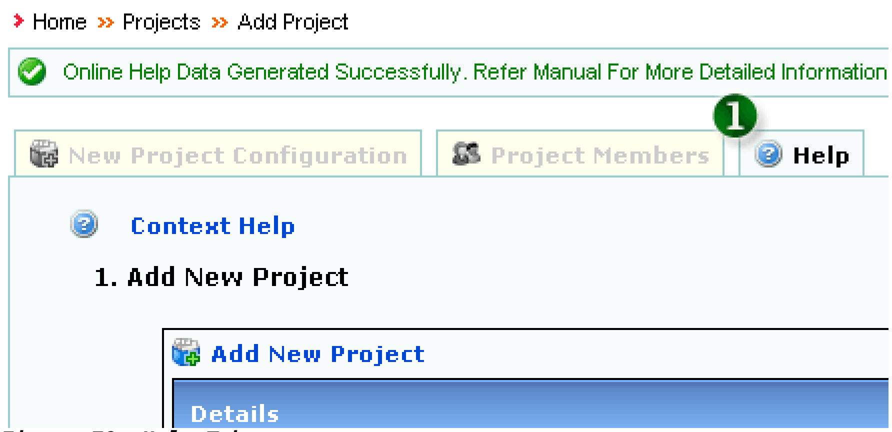


Figure 70: Help Tab

1. CLICK HELP TAB FOR QUICK HELP

7.4 Search Listing

Search your Listing for the most appropriate data. Search is simple. Just check the "SEARCH RECORDS" checkbox and the search fields relevant to the page will be automatically generated.

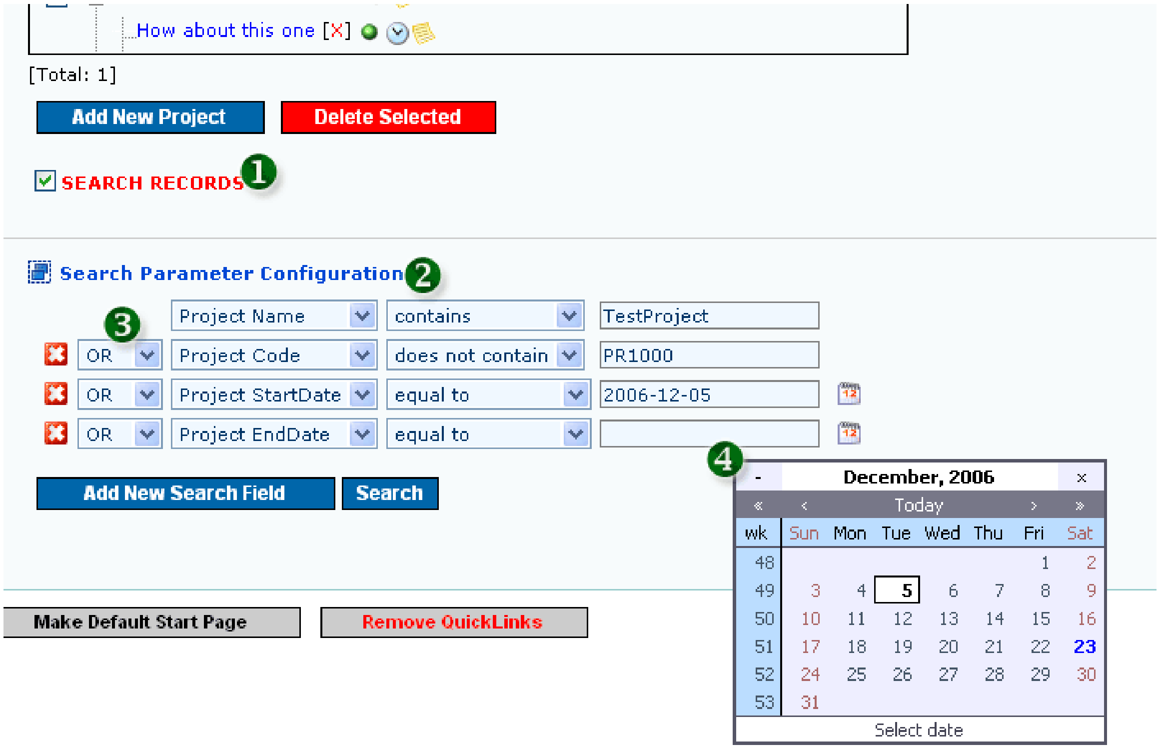


Figure 71: Search Records in Listings

1. **CLICK SEARCH RECORDS TAB TO SEARCH RECORDS IN LISTING**
2. **SEARCH PARAMATERS RELEVANT TO THE PAGE ARE DISPLAYED**
3. **QUERY THE SEARCH APPROPRIATELY**
4. **SEARCH IS BASED ON DATA TYPE (EX: DATE)**

Uncheck the "SEARCH RECORDS" checkbox to return back to non-search mode.

7.5 Sort Listing

For almost all listings, you can Sort all the Relevant Fields Ascending or Descending. Just click the Up or Down arrow at the Field Title.

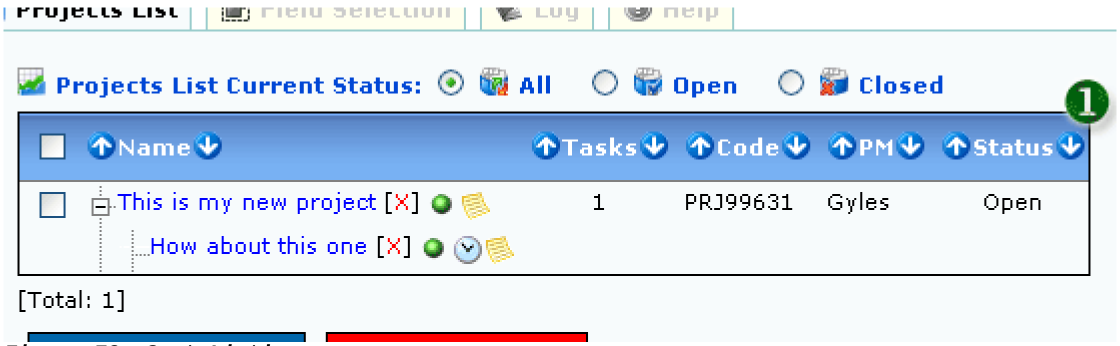


Figure 72: Sort Listing

1. CLICK UP SIGN FOR ASCENDING OR DOWN SIGN FOR DESCENDING ORDER

7.6 AJAX Heavy

To reduce time and enhance Usability, we have made the pages to be heavily AJAXed. Whenever AJAX is in action you can refer to the "EXECUTING..." text at the top of the page with the Network Icon .

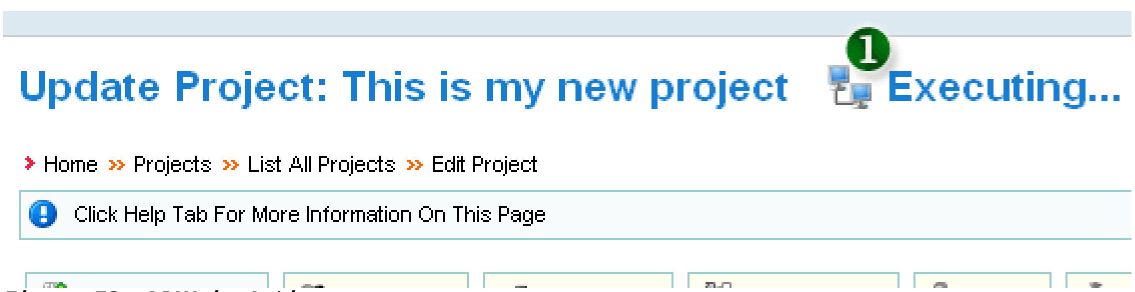


Figure 73: AJAX in Action

1. AJAX IN ACTION INDICATOR

7.7 Tabbed Browsing

To reduce time and enhance Usability, we have made the relevant pages in Tabs. Means, less traversing through the web pages to get your job done.

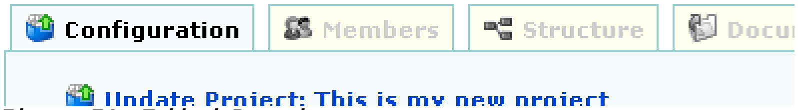


Figure 74: Tabbed Browsing

7.9 Comprehensive Logging

Logging is enabled for most pages and features. Logging feature can be turned on by the Administrator (Default is Off). Go to Admin System -> System Configuration to configure Logging Feature

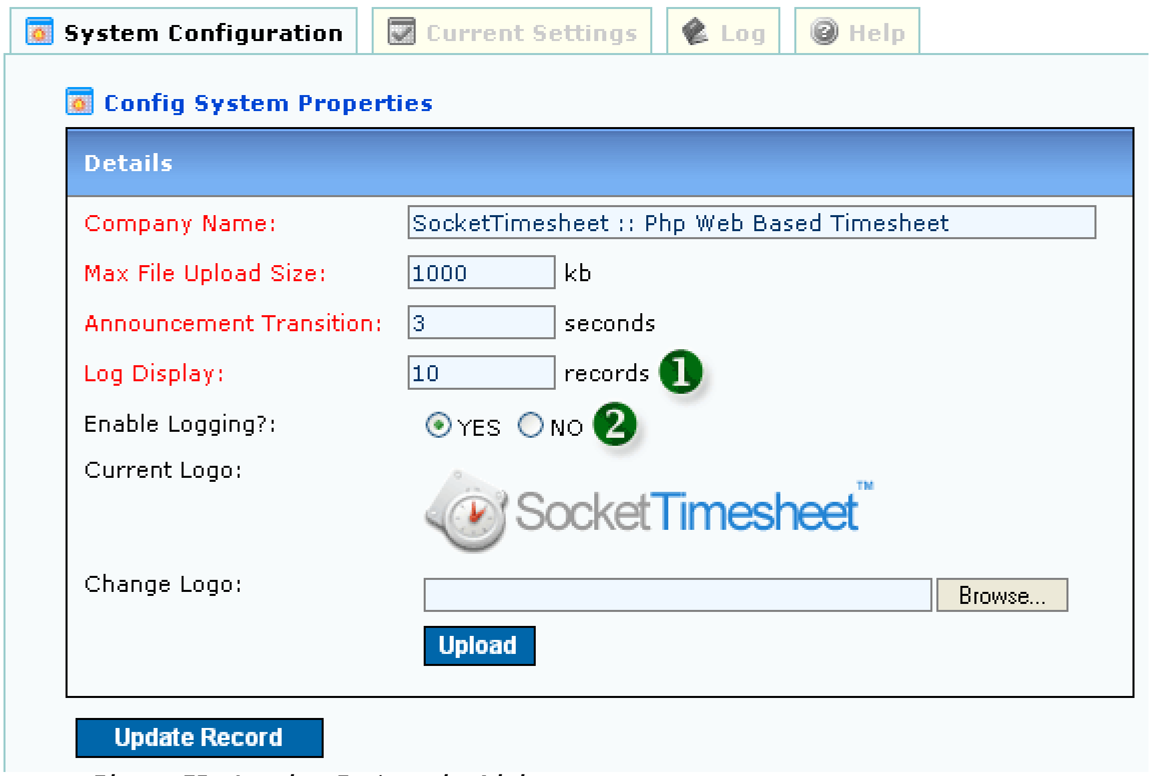


Figure 75: Logging Feature in Admin

1. LOGIN RECORDS PER DISPLAY (ORDERED BY DATE DESCENDING)
2. TURN LOGGING FEATURE ON OR OFF

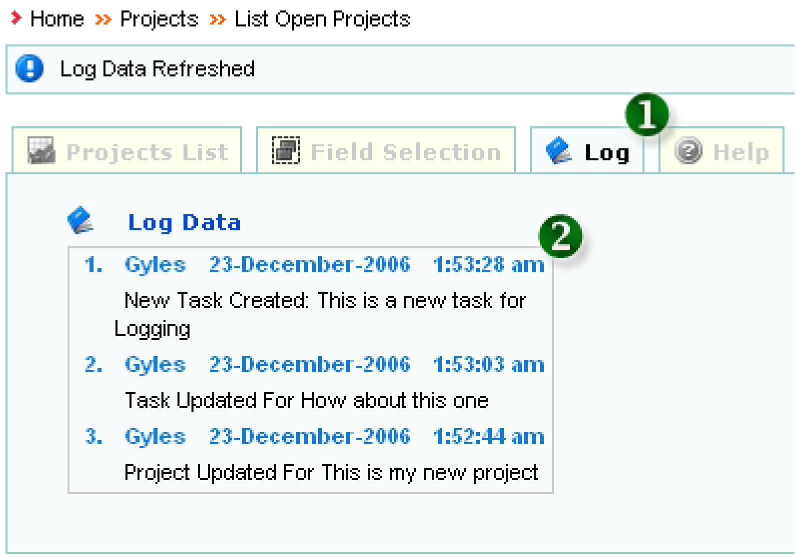


Figure 76: Sample Log Data

1. **LOG TAB**
2. **SAMPLE LOG DATA**

7.10 Listing Field Selections

For every Listing, you can select Any Relevant Fields that are appropriate according to your Preference. Whenever Fields are changed, System will automatically 'Remember' your last changes and will maintain it until you change it back Reset Selection is pressed.

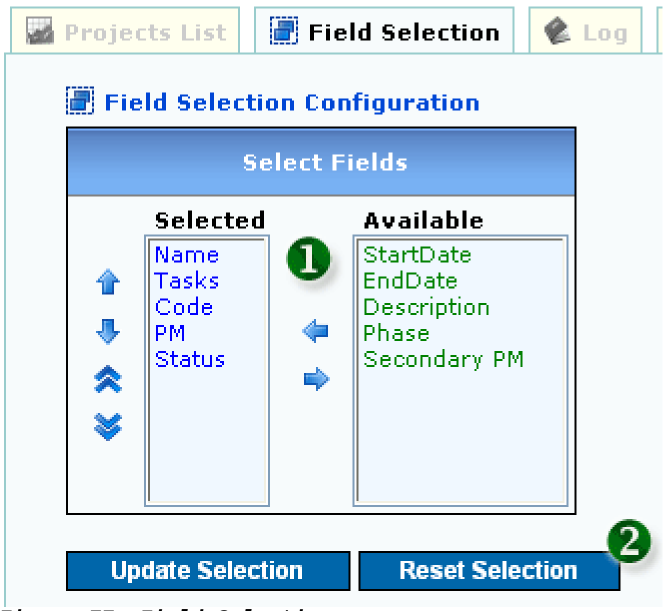


Figure 77: Field Selection

1. SELECT RELEVANT FIELDS IN LISTING AND PRESS UPDATE SELECTION BUTTON
2. CLICK RESET SELECTION TO RETURN FIELDS TO ITS ORIGINAL DEFAULT SELECTION

7.11 Premium Services

Whenever there's a need for Customization, please contact our Premium Services Personnel at premium@sockettimesheet.com to discuss on it further