eTrack System

employee timesheet & expense tracking software

Use Cases

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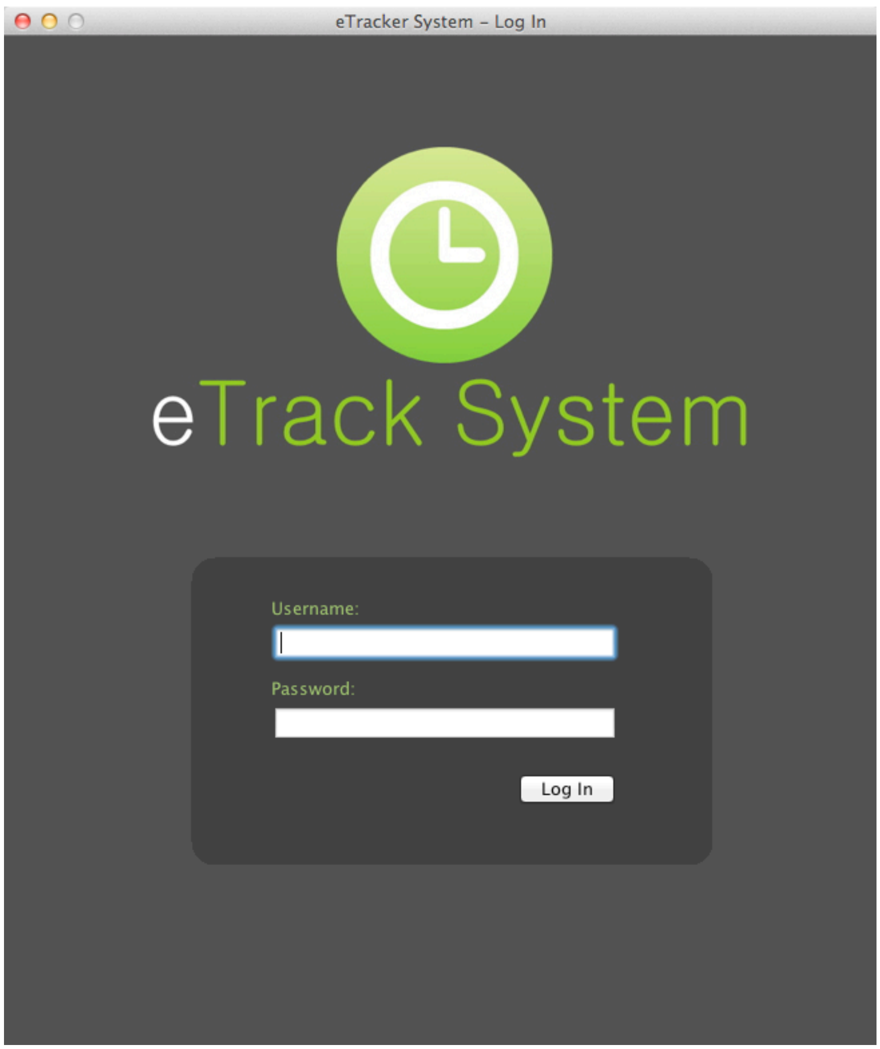
1 Administrative Users – Common Operations

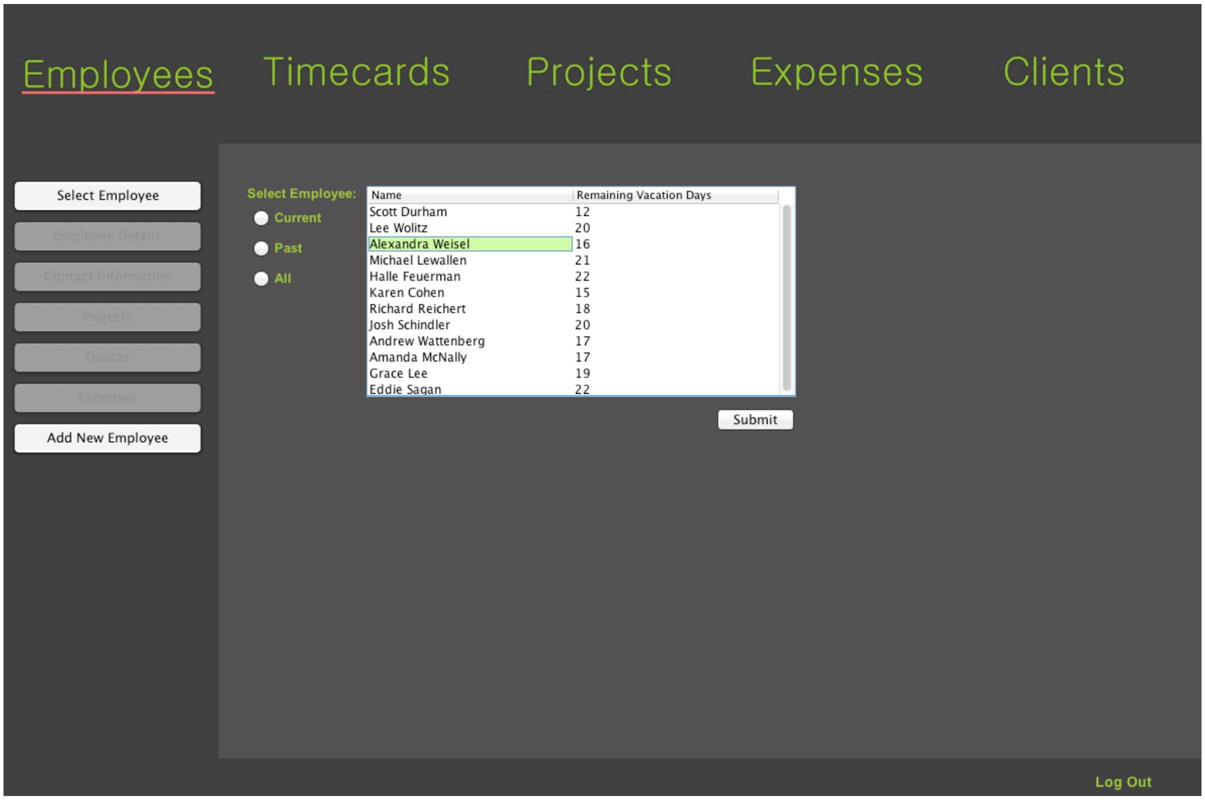
This section is intended to give administrative users detailed step-by-step instructions for how to use the most popular functions of the e-Tracking System.

1.1 Updating a consultant's personal information

1) Log into the eTrack system using your designated username and password.



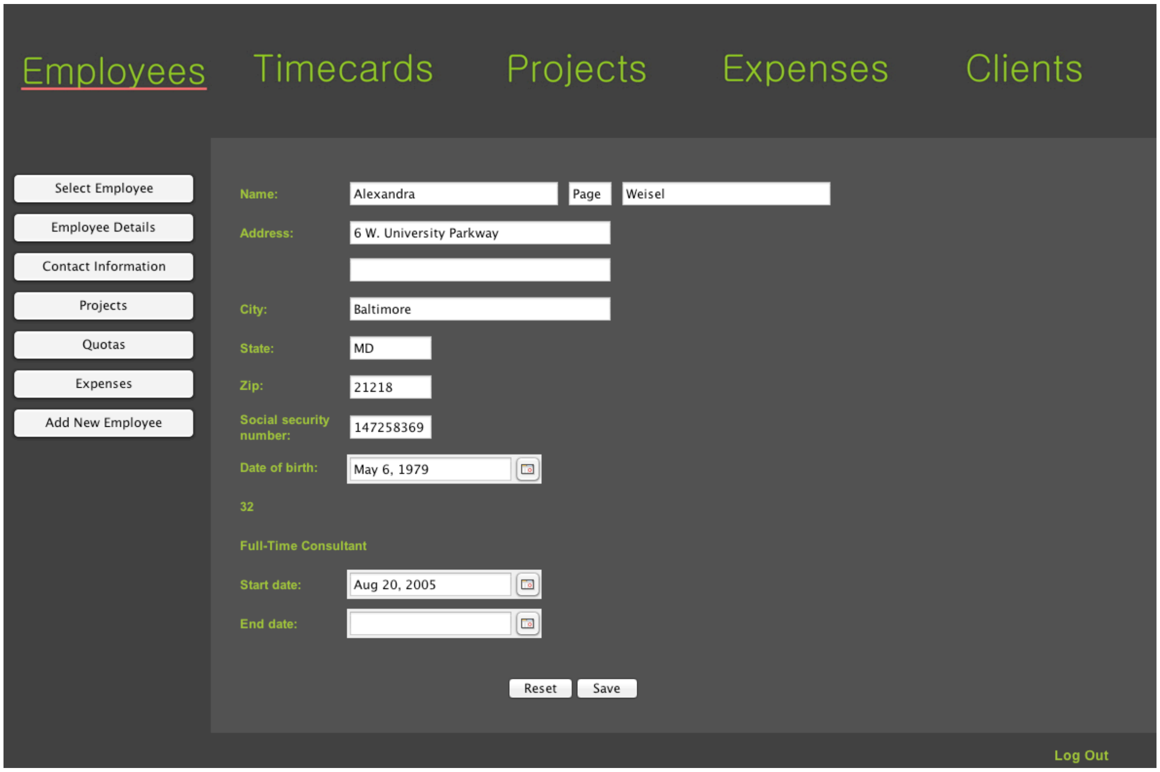
2) In the Select Employees screen, select the employee you wish to edit. You can use the Current or Past filters to narrow down the possibilities.



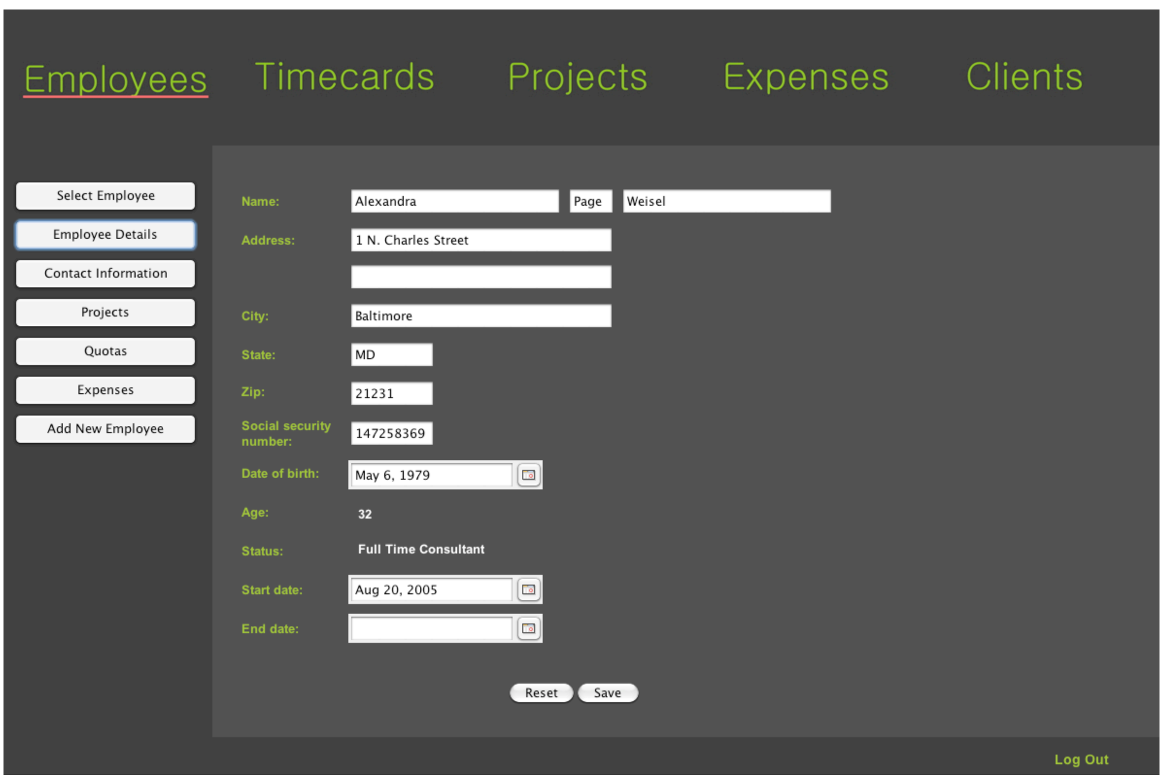
3) Select the desired employee and click Submit.

4) On the resulting screen, change the consultant's address to the following:
    a. Address 1: 1 N. Charles Street
    b. City: Baltimore
    c. State: MD
    d. ZIP: 21231

Before change:

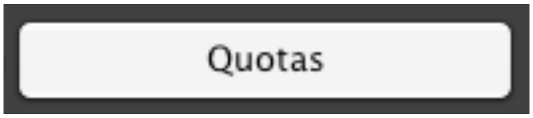


After change:



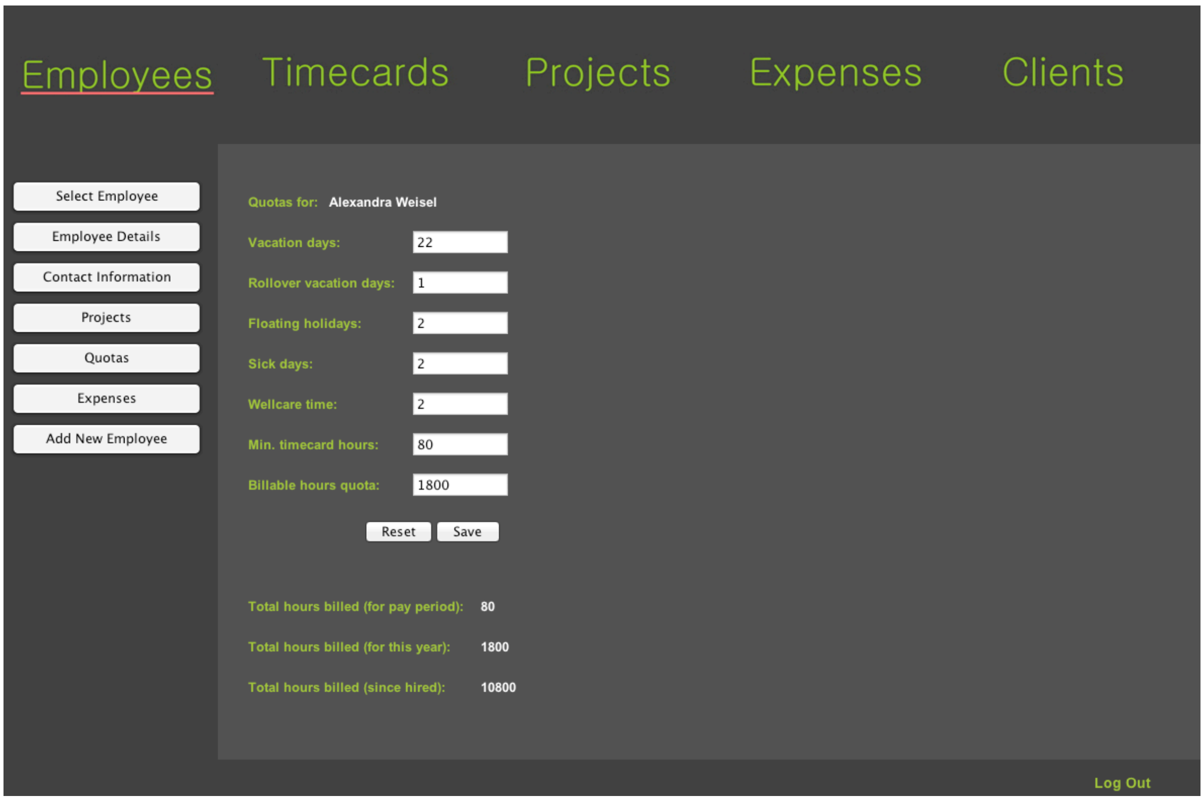
5) Click Save.

6) Select the Quotas button from the left hand navigation

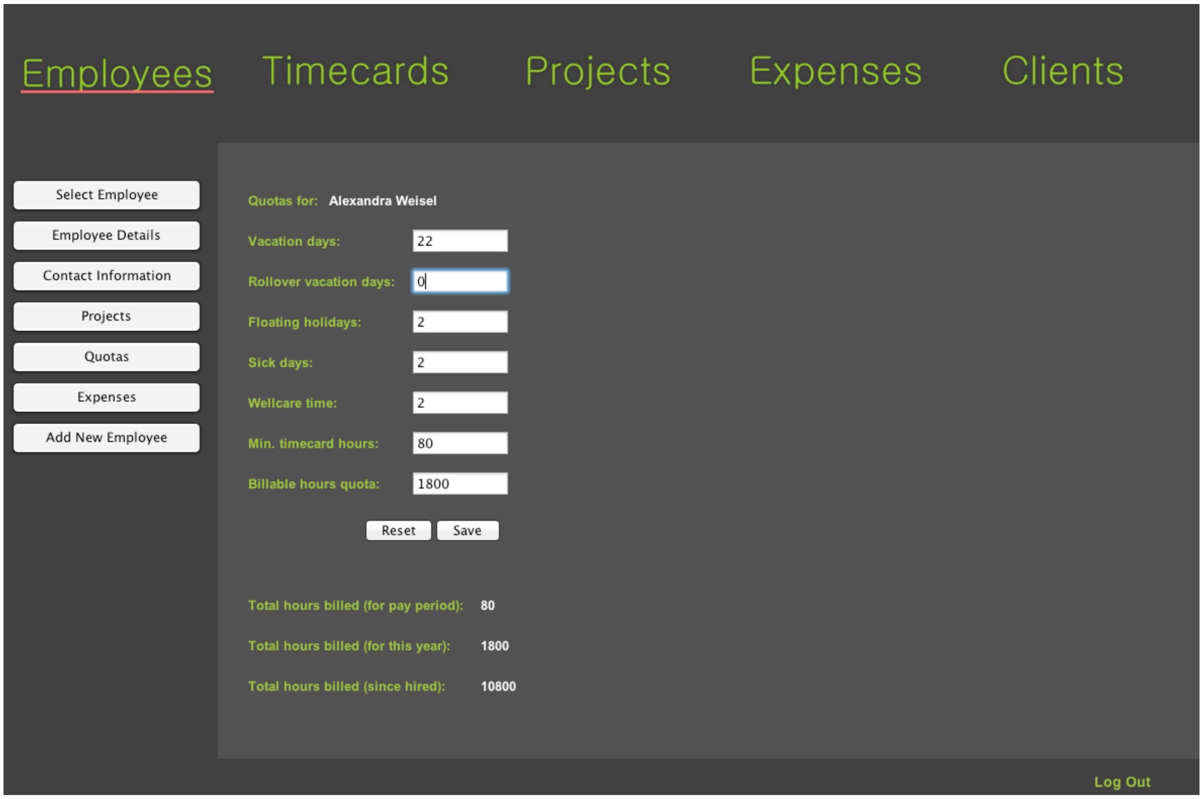


7) Change the user's rollover vacation days to 0

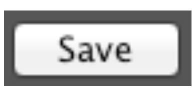
Before change:



After change:

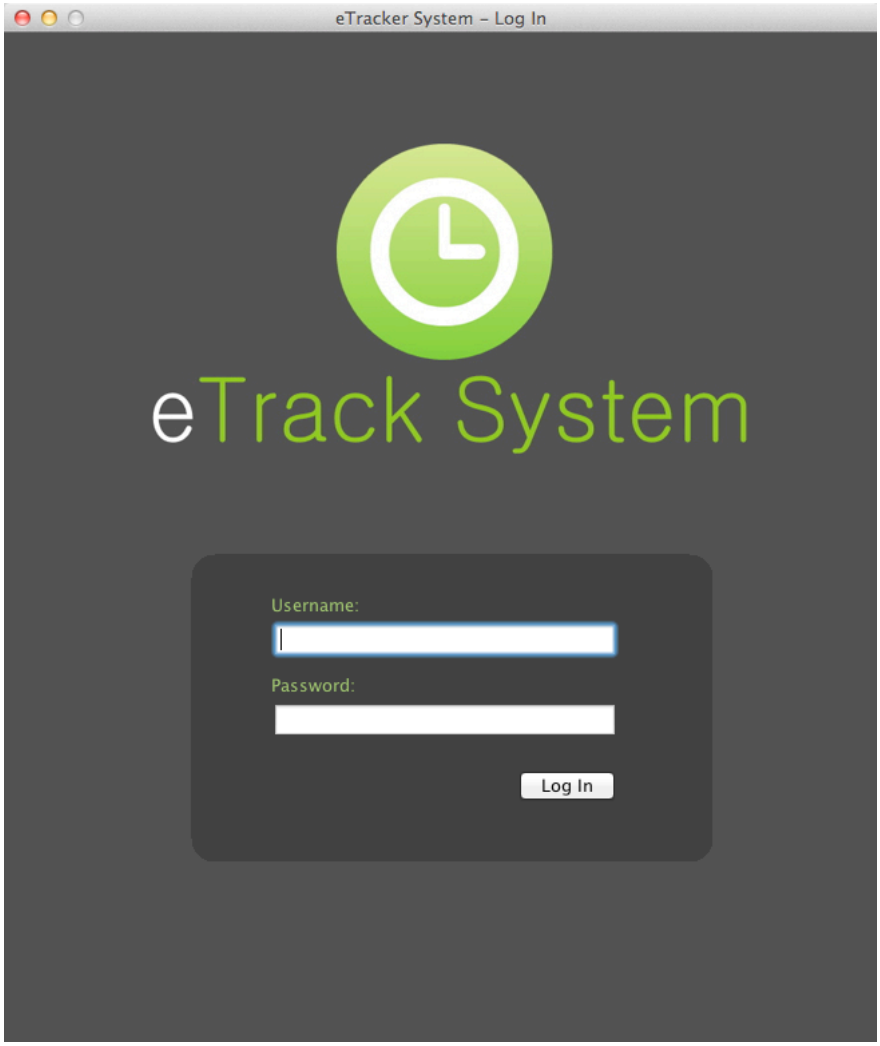


8) After verifying the accuracy of the user's information, click the Save button to save changes.



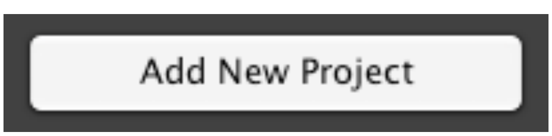
1.2 Adding a Project

1) Log into the eTrack system using your designated username and password.



2) Click on the Projects button at the top of the screen

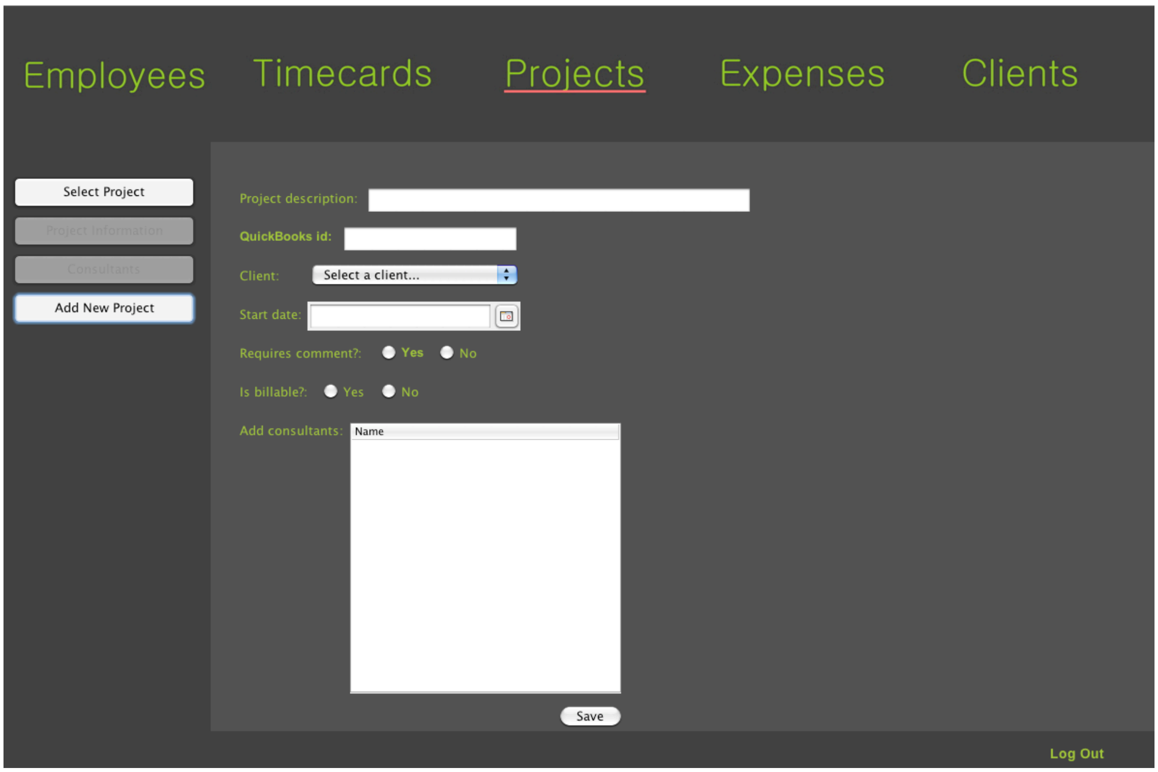
3) Click on the Add New Project button at the left side of the screen



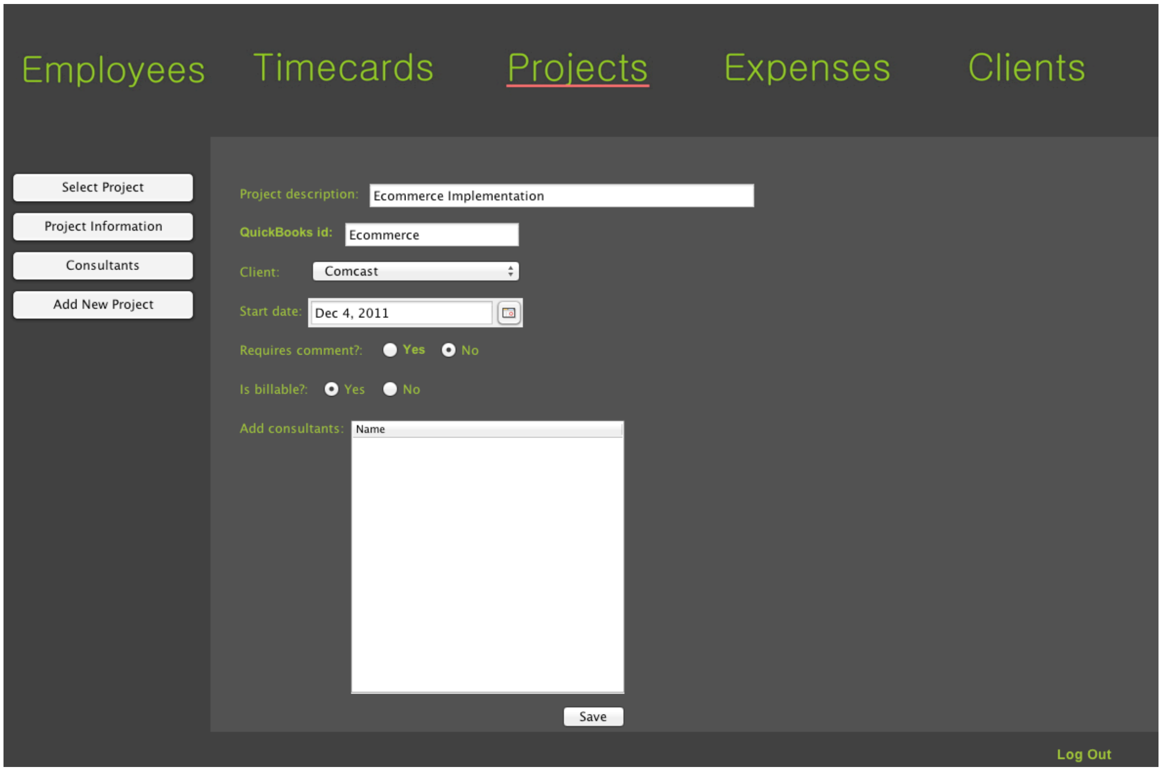
4) Enter in a Project with the following information:

a. Project description: Ecommerce Implementation
b. QuickBooks ID: Ecommerce
c. Client: Comcast
d. Start Date: Today's Date
e. Requires Comment: False
f. Is Billable: True

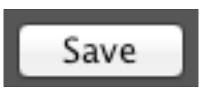
Before changes:



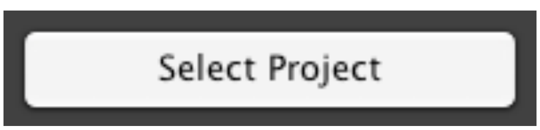
After changes:



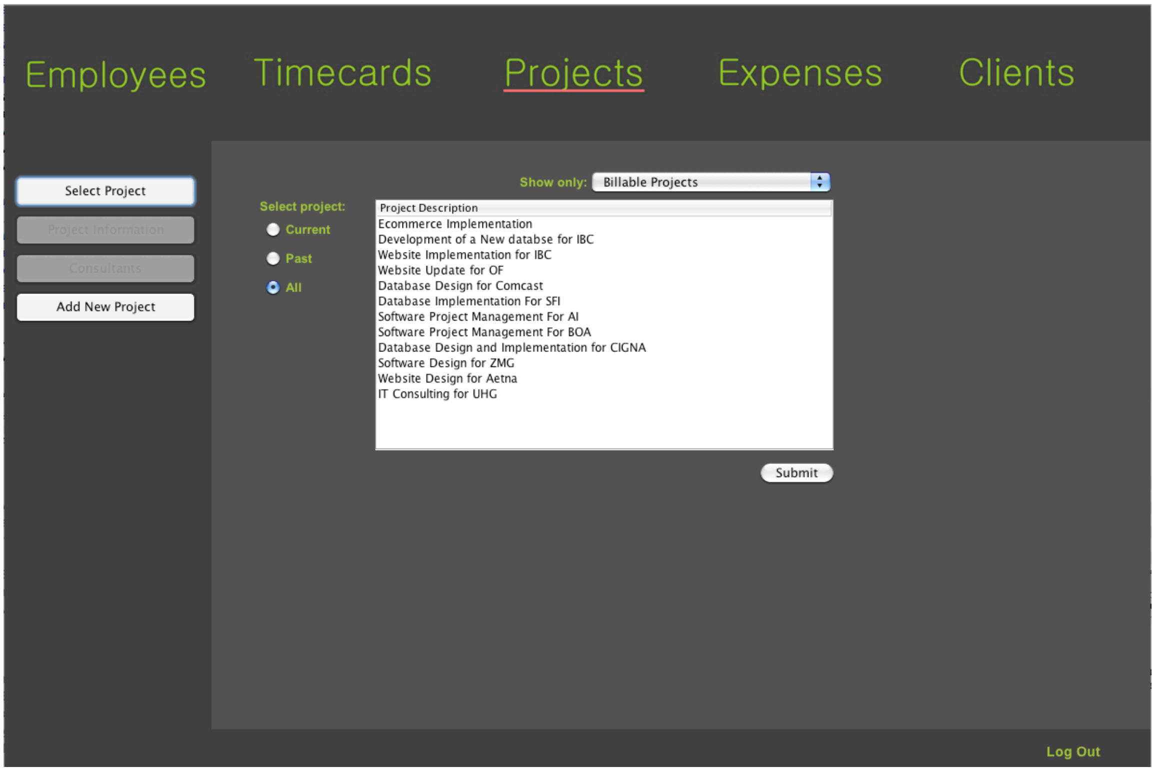
5) Click Save



6) Click on Select Project on the left hand side

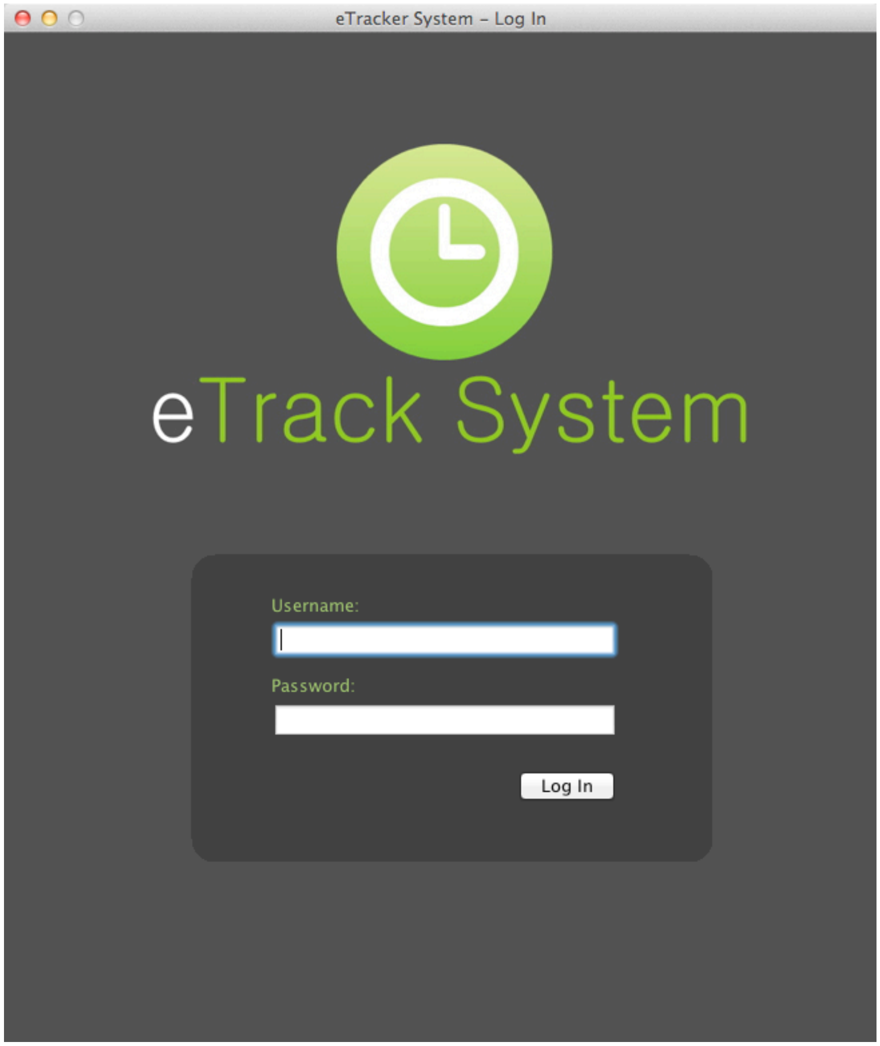


7) Verify that the Project is now available in the Projects table.



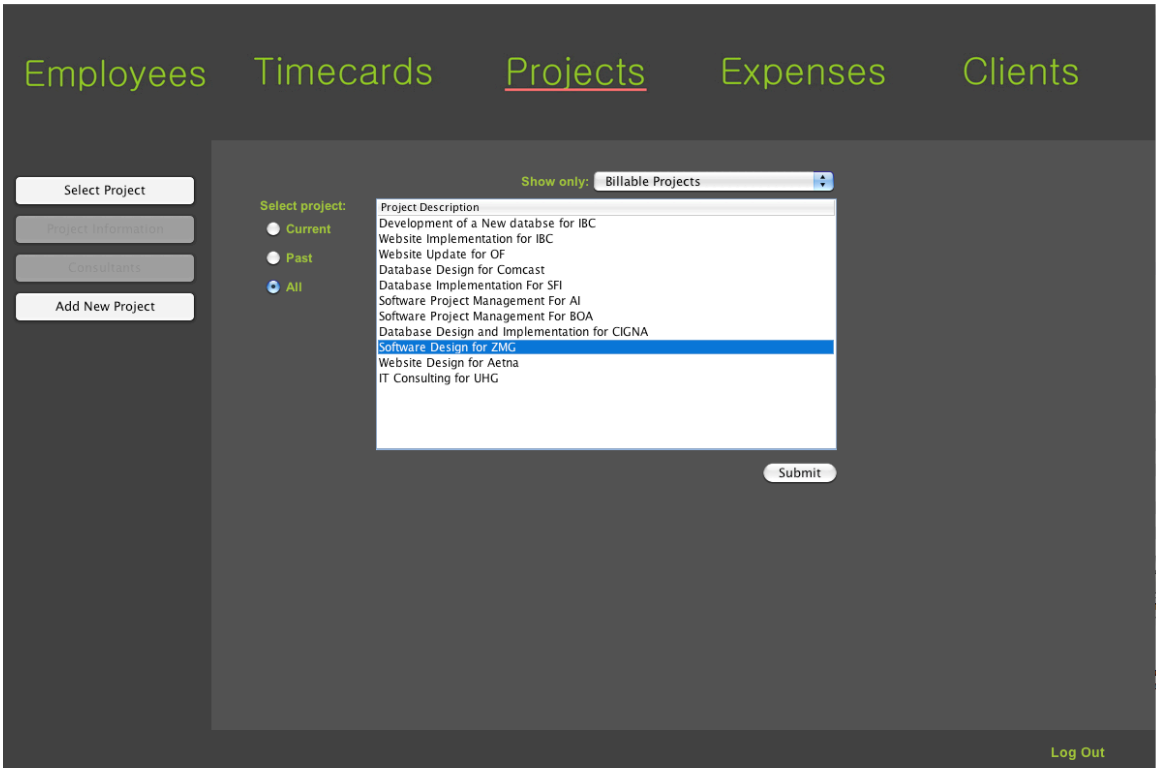
1.3 Adding Consultants to a Project

1) Log into the eTrack system using your designated username and password.

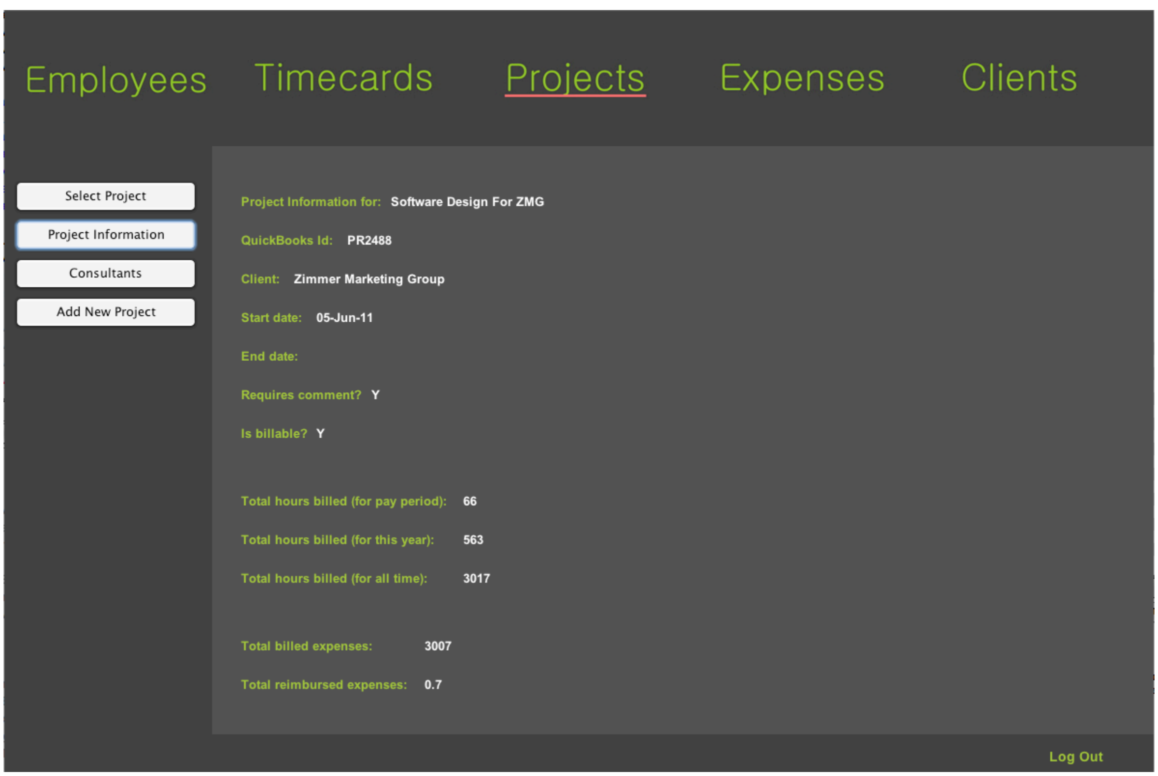


2) Select the Projects button at the top of the screen.

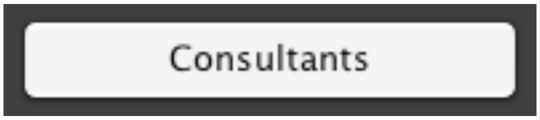
3) In the Project table, select any project and click Submit.



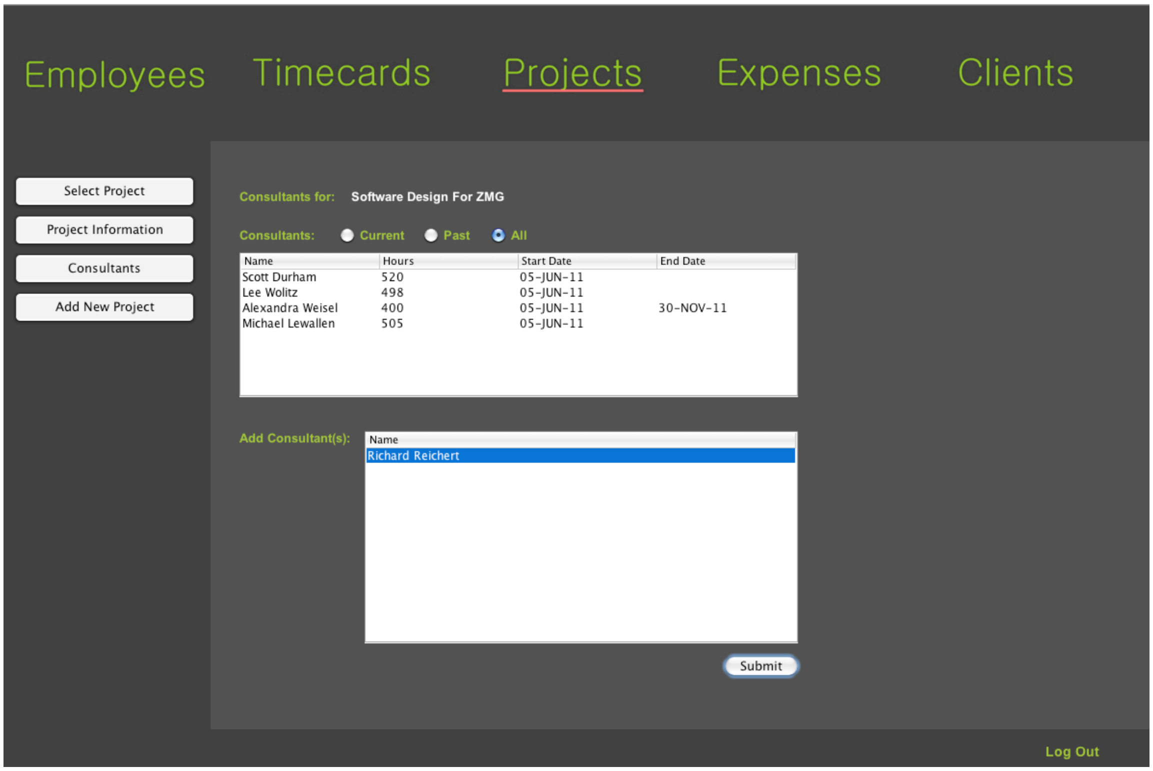
4) On the resulting Project Information screen, verify that the loaded project is the project which was selected.



5) Click on the Consultants button.

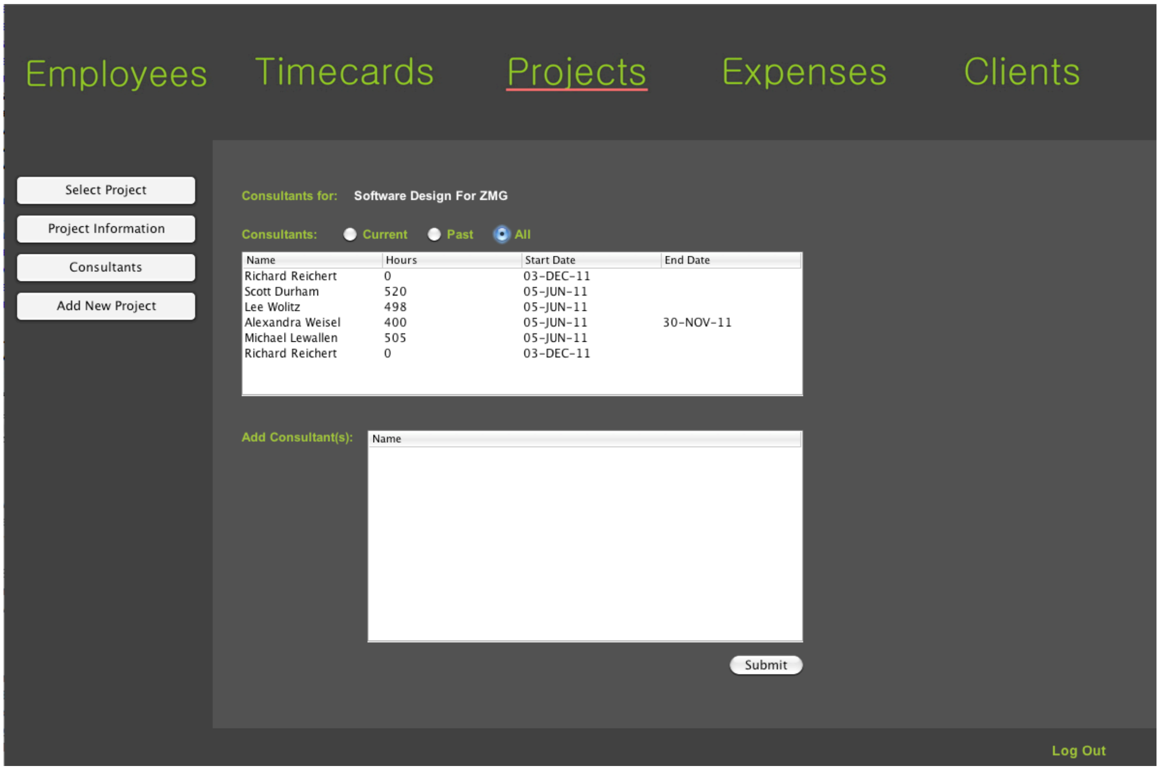


6) In the Add Consultants control, select a consultant.



7) Click Submit.

8) Verify that the Consultant was added to the Consultants table above as an active consultant.



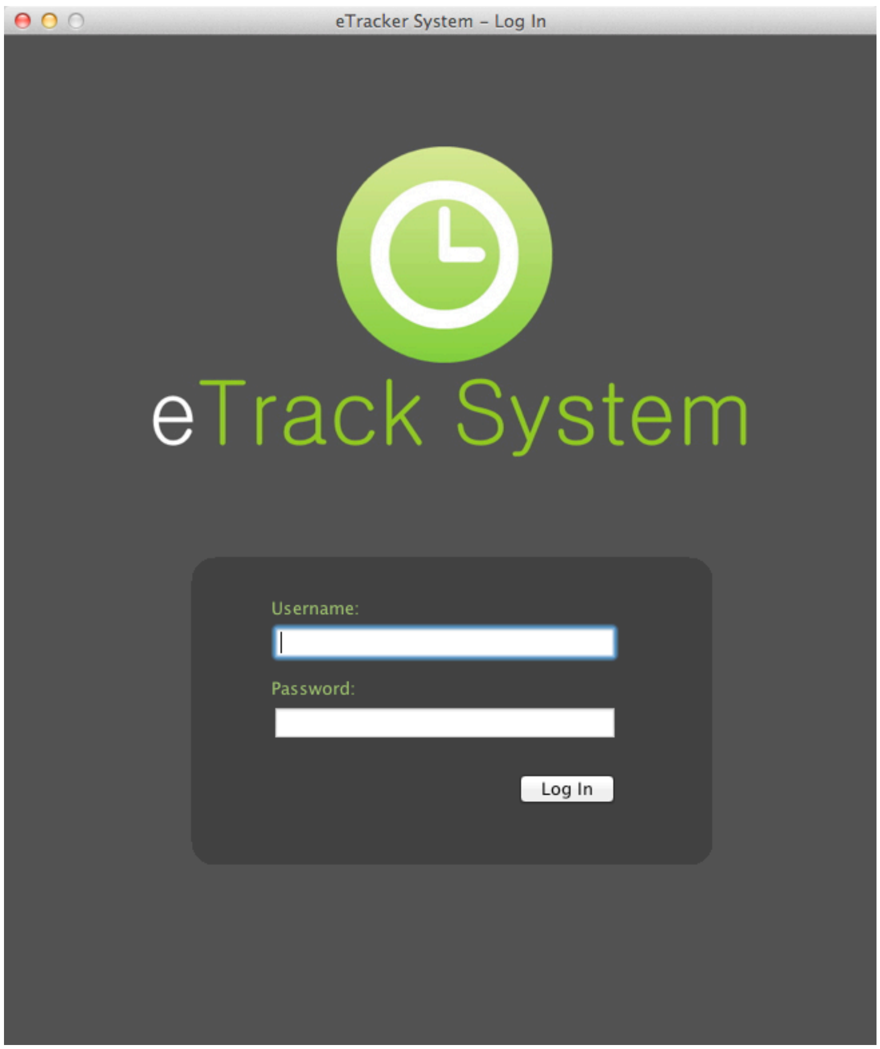
2 Consultant Users – Common Operations

This section is intended to give consultant users detailed step-by-step instructions for how to use the most popular functions of the e-Tracking System.

2.1 Timecards

2.1.1 Log Activity

1) Log into the eTrack system using your designated username and password.



2) Decide on an activity that you would like to log in your timecard.

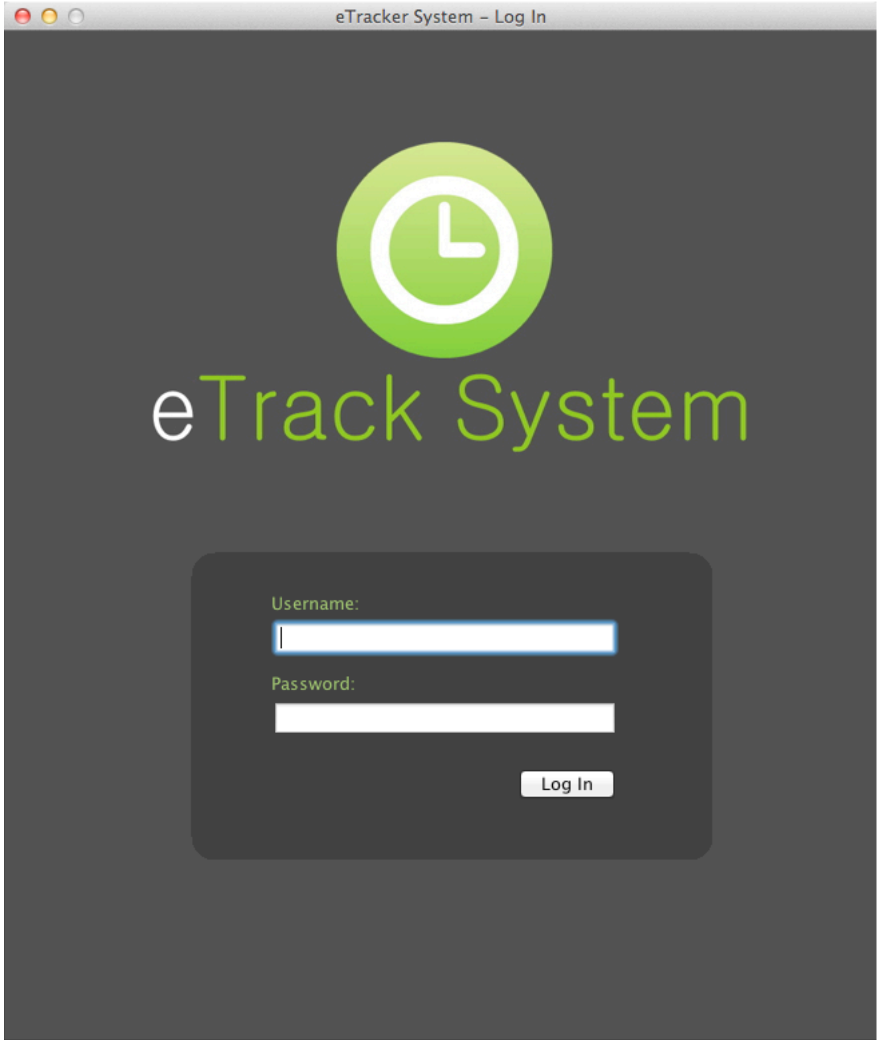
3) Find the first available empty row. If no additional project rows are available, add a new row by clicking the + icon.

4) Select the desired project from the drop down list. If the project to which you must log time is a Client Project and the Client Project is not available in the drop down list, contact an administrator.

5) Click in the text box beneath the date on which the activity occurred.
6) Enter in the length in hours of the activity. Half-hour increments are permitted.
7) Save the timesheet by clicking the Save button at the bottom right.

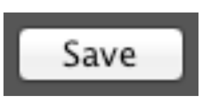
2.1.2 Remove activity

1) Log into the eTrack system using your designated username and password.



2) Click the – icon that is adjacent to the project that is to be deleted.

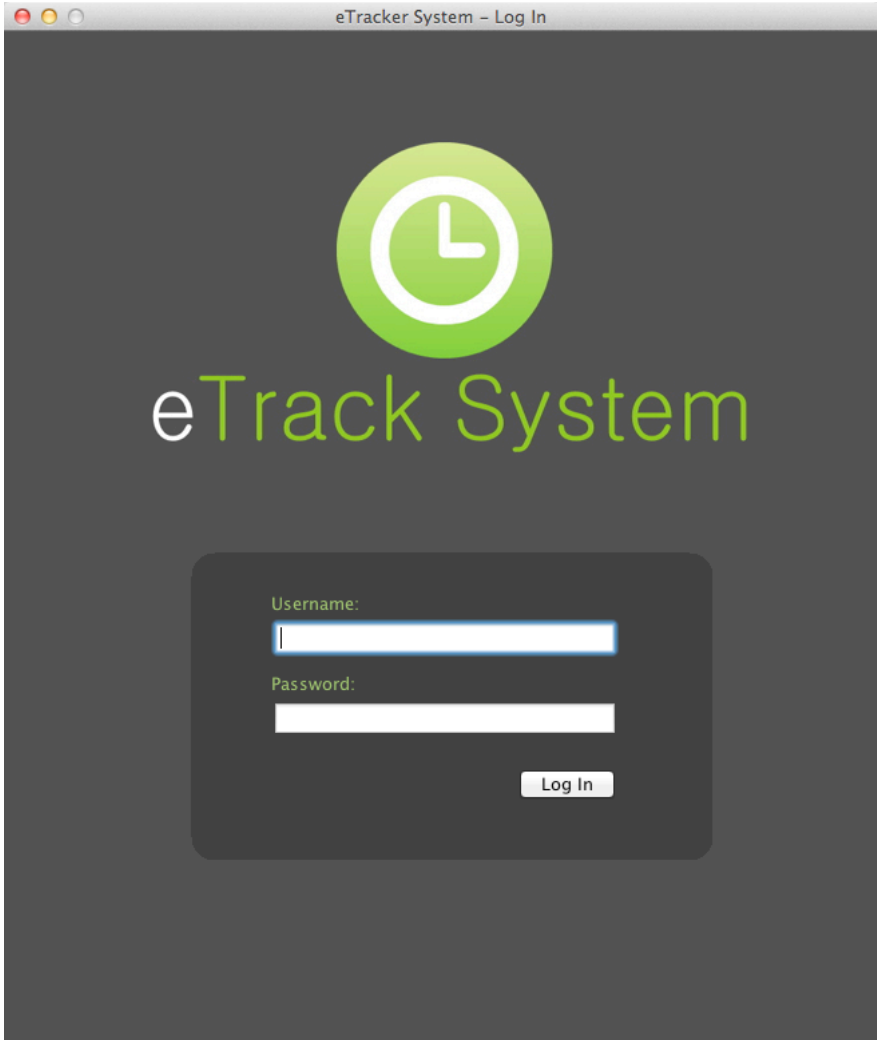
3) After verifying that the project has been removed, save the timesheet using the Save button at the bottom right.



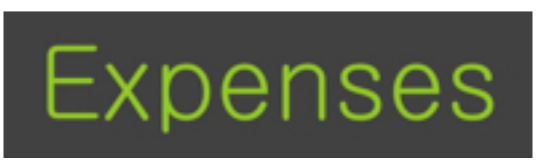
2.2 Expenses

2.2.1 Log Expense

1) Log into the eTrack system using your designated username and password.



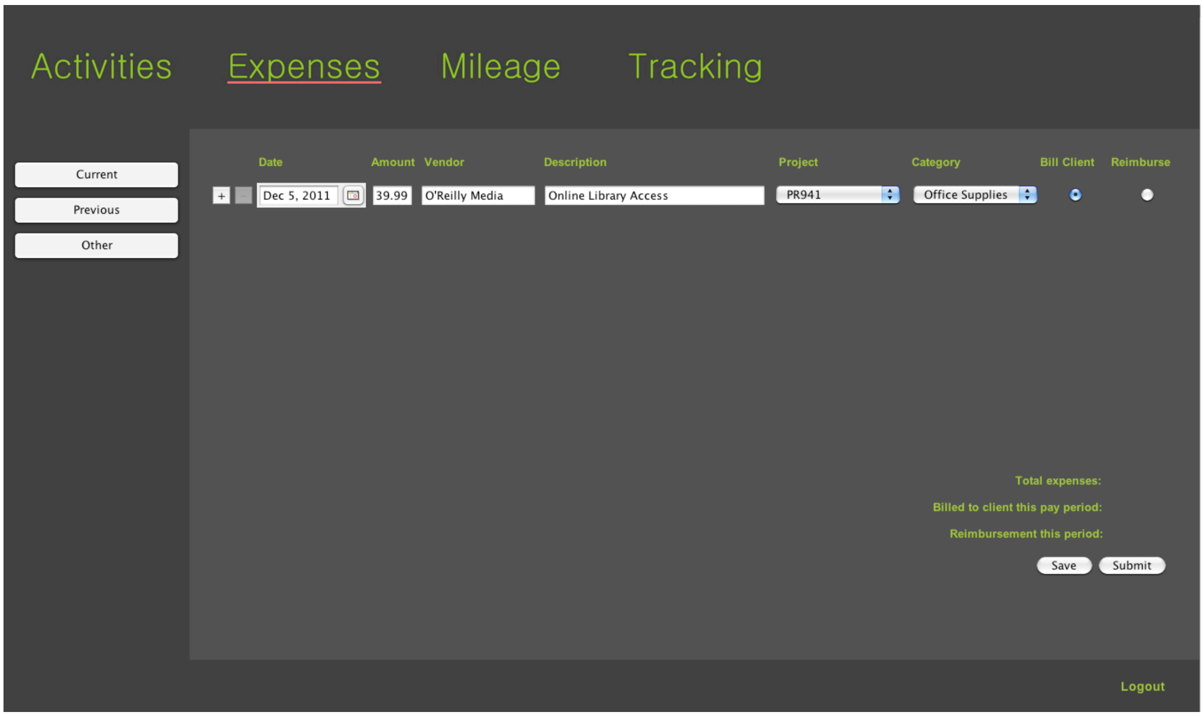
2) Click on the Expenses button at the top of the screen.



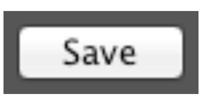
3) Find the first available empty row. If no rows are empty, one can be added via the + icon.

4) Under the Date heading, enter in the date the expense occurred.
5) Under the Amount heading, enter in the dollar amount of the expense (e.g. 39.99).
6) Under the Vendor heading, enter in a description of the vendor. For example, for your O'Reilly Books Online subscription, enter "O'Reilly Media."

7) Under Description, briefly describe the nature of the expense. Reusing the previous example, you would write something along the lines of “Online Library Access.”
8) Within the Project drop down list, choose the project associated with the expense. If the project to which you must log the expense is a Client Project and the Client Project is not available in the drop down list, contact an administrator.
9) Within the Category drop down list, choose the category associated with this expense.
10) Choose one of the two billing options, “Bill Client” or “Reimburse.”
11) Verify all information.

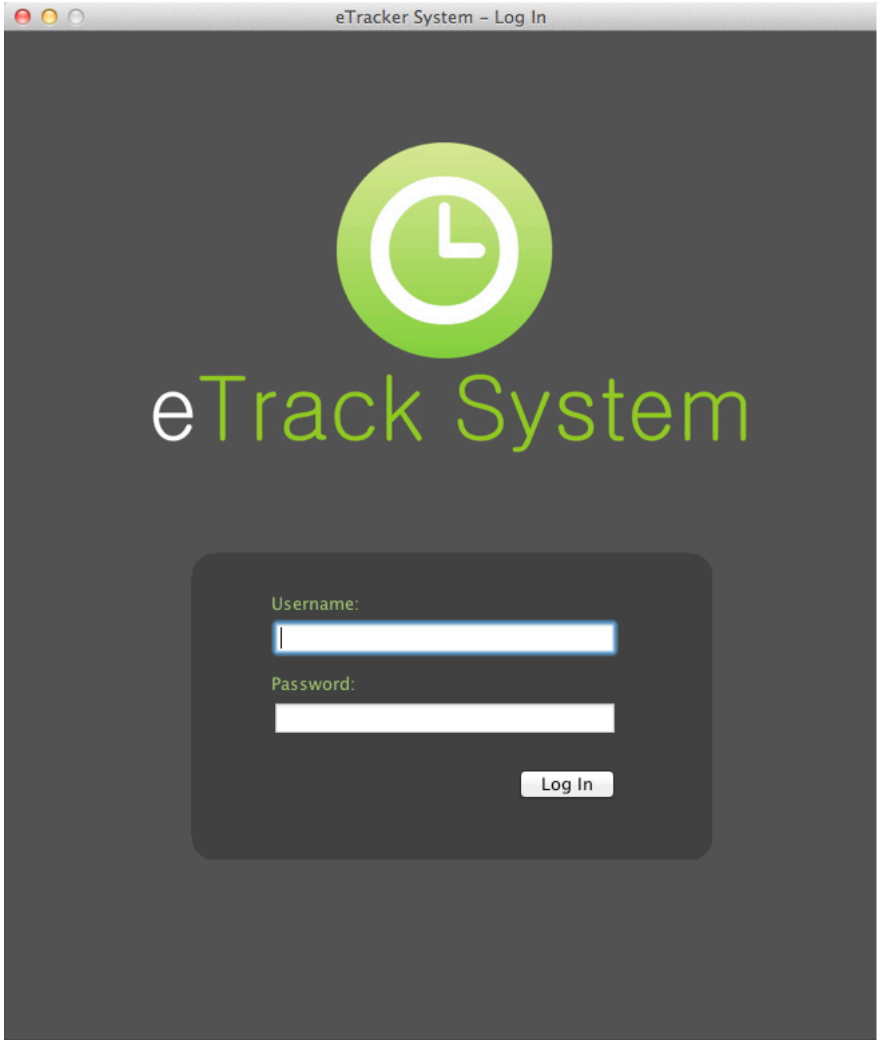


12) Click the Save button at the bottom right.



2.2.2 Remove Logged Expense

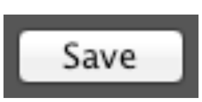
1) Log into the eTrack system using your designated username and password.



2) Click on the Expenses button at the top of the screen.

3) Click the – icon that is adjacent to the expense that is to be deleted.

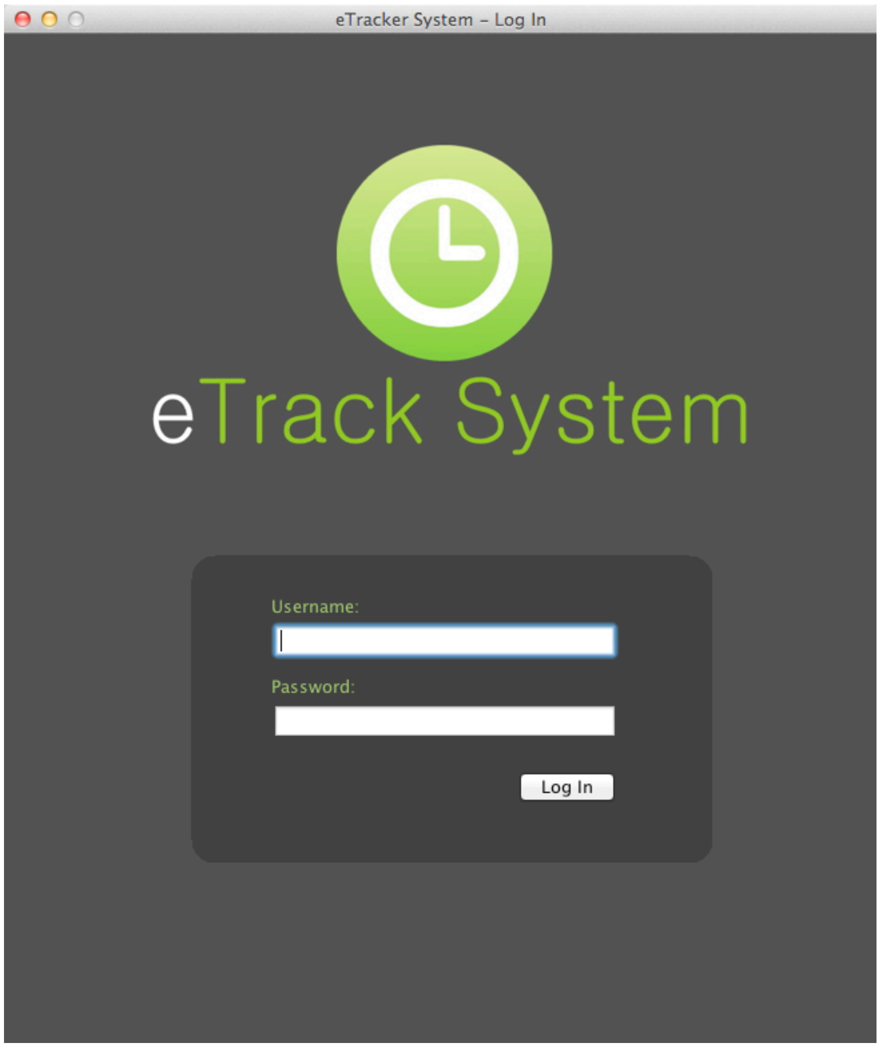
4) After verifying that the project has been removed, save the timesheet using the Save button at the bottom right.



2.3 Mileage

2.3.1 Log Mileage

1) Log into the eTrack system using your designated username and password.

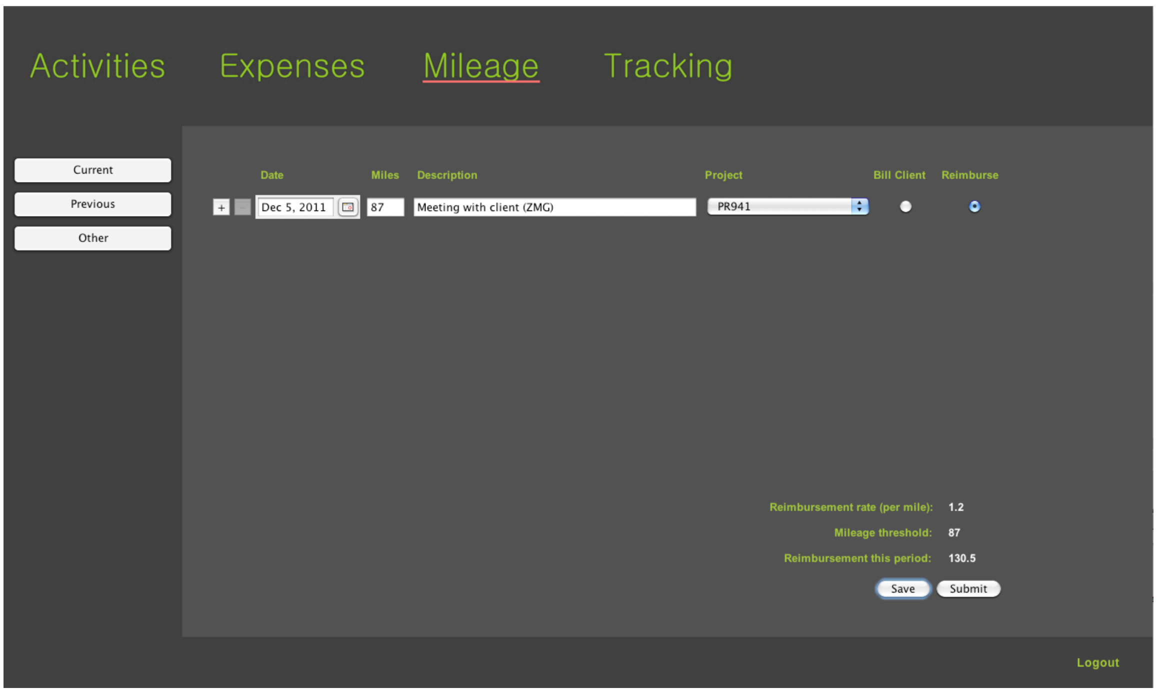


2) Click the Mileage button at the top of the screen.

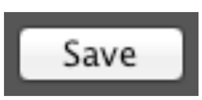
3) Find the first available empty row. If no rows are empty, one can be added via the + icon.

4) Under the Date heading, enter in the date that the travel occurred.

5) Under the Miles heading, enter in the total number of miles incurred that day for the particular project. For example, if it was round trip, add together both legs of the trip and put the total in the same field.
6) Under the Description heading, briefly describe the nature of the trip and its necessity.
7) Within the Project drop down list, choose the project associated with the expense. If the project to which you must log the mileage is a Client Project and the Client Project is not available in the drop down list, contact an administrator.
8) Choose one of the two billing options, "Bill Client" or "Reimburse."
9) Verify the accuracy of the information.

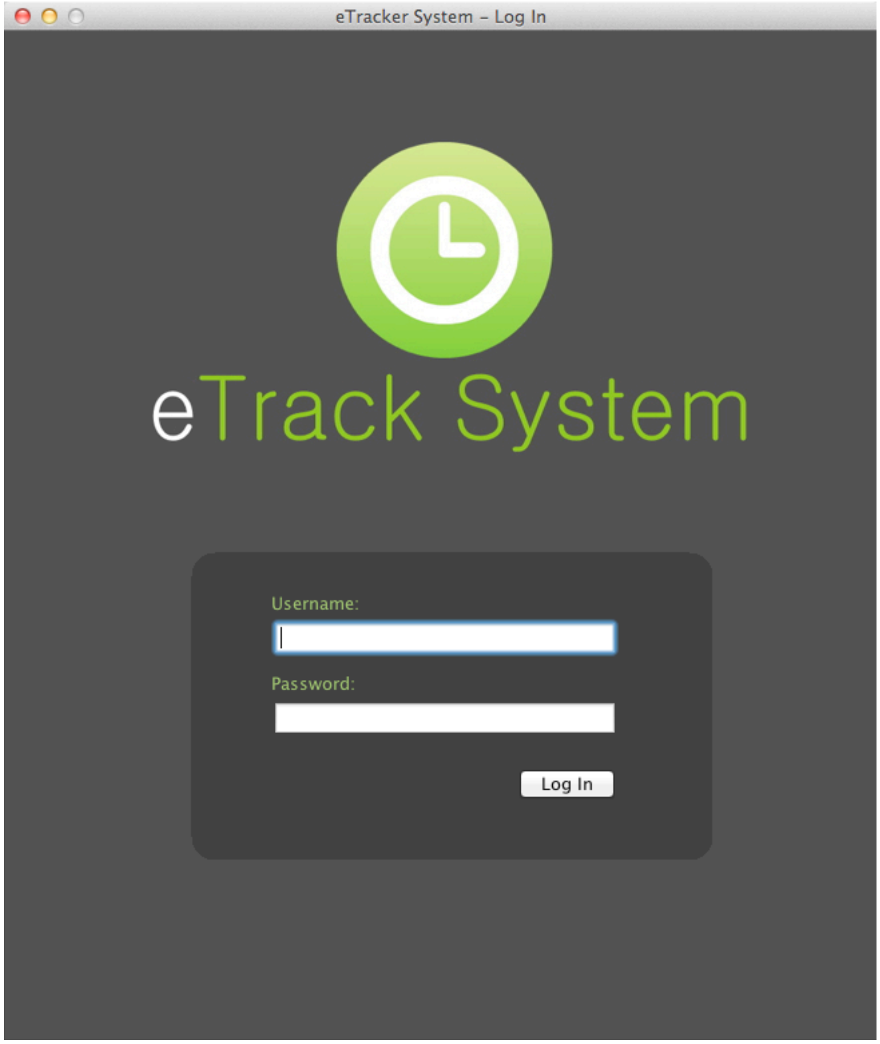


10) Click the Save button at the bottom right.



2.3.2 Remove Mileage Expense

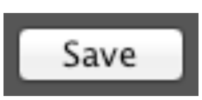
1) Log into the eTrack system using your designated username and password.



2) Click on the Mileage Button at the top of the screen.

3) Click the – icon that is adjacent to the expense that is to be deleted.

4) After verifying that the mileage has been removed, save the timesheet using the Save button at the bottom right.



2.4 Submitting Timecard

Once the timecard is completed and all expenses, activities, and mileage have been recorded, the user may submit it by clicking the Submit button at the bottom right.

Before doing so, the user should ensure that the following conditions are met:

1) That no activity total exceeds 24 hours in a single day
2) That the total duration of all activities on a timecard exceeds the consultants assigned minimum hours
3) That no mileage entry is submitted that is below the mileage threshold (and thus not eligible for reimbursement)
4) That all expense categories and projects have been reported accurately.

Once the consultant submits a timesheet, it can no longer be edited.