
timesheet

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CONTENTS

Current version **4.4.9**

Dolibarr minimum version : **3.5.6**

Dolibarr latest version tested : **13.0**

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Note: this module is not able to do any changes to invoices; the only invoice related action possible is the creation of a draft invoice by using the Dolibarr core methods (there is no invoice related database request in the module)

- **Other module**

Project module must be activated (should be automatically activated upon timesheet activation)

- **Project created and validated**

draft project won't be shown by default but they can be shown by changing the module configuration (see setup page part)

- **Project open**

Timespent entry is only possible if date of the entry is between start and end date of the project; no start date mean that the project's task will be shown until the end date; no end date means that the project's task will be always shown after the start date

- **Task created and open**

Timespent entry is only possible if date of the entry is between start and end date for the task. No start date mean that the task will be shown until the end date; no end date means that the task will be always shown after the start date

- **User assigned to the task**

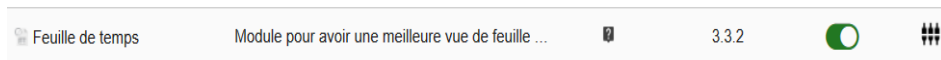
in order to assign a user to a task he must be first assign to the project via Project→contact Project. Then he can be assigned to the task : Task > resource assignation.

MODULE SETUP



How to access the setup page

The module setup can be found in the Home (top menu)>Setup (left Menu)>module then on the timesheet line one must click on the icon at the right



- **Setup page**

The module setup page is made of 4 tabs, the changes are not lost while changing tab so to reset the changes one must reload the page. The “Other” tab won’t be detailed in this manual as it is mostly a feedback email link.

- **Setup page: General Tab**

This tab includes the setup that must be done after the module installation.

General
Advanced
Invoice
Other

Setup of the display of the time spent under the Top menu \'Timesheet\' then Left menu \'Timesheet\'

General options

| Name | Description | Value |
|---------------------------------|---|--|
| Unit of time spent | Show the duration spent on the task per day or per hour | <input type="radio"/> Hours <input checked="" type="radio"/> Days |
| Numbers of hours per day | Number of working hours per day (used when the duration is display per day) | 8 |
| Maximum hours per day | Set the maximum hours to be entered per day and per user via the timesheet | 12 |
| time span | Time span for the timesheet entries. | <input type="radio"/> Week <input checked="" type="radio"/> Spilted week <input type="radio"/> Month |
| Add up holiday time | Include the holiday time in the total line | <input checked="" type="checkbox"/> |
| attached documents | Enable to add documents attached to the timesheets | <input type="checkbox"/> |
| register time spent for others. | enable the time spent entry for subordinates. | <input checked="" type="checkbox"/> |

DisplayOptions

| Name | Description | Value |
|-----------------|---|-------------------------------------|
| Hide draft | Hide the tasks related to draft projects | <input checked="" type="checkbox"/> |
| hide references | hide or not the references of the tasks and projects | <input checked="" type="checkbox"/> |
| Hide Zeros | Hide the duration of the task when it's null (0 or 00:00) | <input checked="" type="checkbox"/> |
| Notes per day | Activate note taking per day and per task | <input checked="" type="checkbox"/> |

Open days

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

Columns to show

| Name | Description | Value |
|-------------|---|-------------------------------------|
| Project | Shows the project's reference and title linked to the task | <input checked="" type="checkbox"/> |
| Parent task | Shows the parent task's reference and the title if there is any parent task. | <input type="checkbox"/> |
| Tasks | Shows the task's reference and title | <input checked="" type="checkbox"/> |
| Start date | Shows the start date of the task | <input type="checkbox"/> |
| End date | Shows the end date of the task | <input type="checkbox"/> |
| Progress | Shows the progress of the task against the estimated time | <input checked="" type="checkbox"/> |
| Company | Shows the name of the company associated with the project | <input checked="" type="checkbox"/> |
| Note | Show an icon that will open a note line below the task's line when clicked on it. | <input type="checkbox"/> |
| Total | Show the total of the ligne displayed (actualised live with time entries) | <input type="checkbox"/> |

SAVE

• Setup Page: Advanced tab

This tab is to setup advanced behaviour of the timesheet such as the favourite task or the approval flows, this one can be left unchanged

General
Advanced
Invoice
Other

Setup of the timesheets' approvals and the favorites' tasks

Approval

| Name | Description | Value |
|--------------------|---|--|
| Approval by weeks. | Approval by weeks instead of approval by users. | <input checked="" type="radio"/> User <input type="radio"/> Week <input type="radio"/> Month |
| Approvals per page | Maximum number of timesheet per approval page | 5 |

Approval process step

| Name | Description | Value |
|---------|--|-------------------------------------|
| Team | The users' hierarchical responsible will have to approve all timesheets | <input checked="" type="checkbox"/> |
| Project | The project manager will have to approve the timesheets concerning his projects. | <input type="checkbox"/> |

Color

| Name | Description | Value |
|-----------|--|--------|
| Draft | Color for the draft holiday & timesheet | FFFFFF |
| Submitted | Color for the holiday & timesheet submitted for approval | F9FFD0 |
| Approved | Color for the holiday & timesheet approved. | DFFFE0 |
| Cancelled | Color for the holiday & timesheet canceled | FFDFDE |
| Rejected | Color for the holiday & timesheet rejected by the approver | FF0000 |

Favourites

| Name | Description | Value |
|----------------------|---|---|
| Favourites | activate the favorites' filtering | <input checked="" type="checkbox"/> |
| favorites' filtering | Chose the default behaviour for favoris filtering | <input type="radio"/> only favorites <input type="radio"/> all but the favorites <input checked="" type="radio"/> shows all tasks |

SAVE

• Setup page: Invoice tab

This tab is to setup the default option in the invoice generation, the invoice generation is accessible from the project menu: either via the project report or via the Invoice Project Time left menu.

General
Advanced
Invoice
Other

Setup of invoicing

Invoice

| Name | Description | Value |
|----------------------|---|---|
| invoice methode | Invoice methode used for grouping time spent on tasks | <input type="radio"/> Task <input type="radio"/> User <input checked="" type="radio"/> Tasks & User |
| invoiceTimeType | invoiceTimeTypeDesc | <input checked="" type="radio"/> Hours <input type="radio"/> Days |
| Default Service | Default service to use to invoice time spent | Don't invoice it. |
| timesheets | invoice all timesheets or only the approved. | <input checked="" type="radio"/> All <input type="radio"/> Approved |
| Show user on invoice | Show the user name on the invoice when the mode of invoicing is 'user' or 'user and task' | <input checked="" type="checkbox"/> |
| Show task name | Show the task name on the invoice | <input checked="" type="checkbox"/> |
| Notes on pdf reports | Display timespent's note instead of task name or in addition to task name on the pdf export | <input type="radio"/> Task <input type="radio"/> Note <input checked="" type="radio"/> Task&Note |

ENTERING TIME SPENT

Timesheet user right is required to have access to timesheet

The default page of the timesheet main menu is the user screen to log the time spent on task (can be change to the chrono page in the setup). The screenshot was taken with the favourite, approval flow & note per day and note activated

- **Blank/draft/saved timesheet:**

This screen is shown when no timesheet was submitted for approval, if there is already time saved, the time will be on a light green background (not configurable) and the day/task that are not eligible for time spend are on a grey background (not configurable) and are not editable

| << Précédent | | | | allez à: <input type="text"/> | | | | Maintenant | | Go | | Suivant >> | | | |
|---------------------------------|---------|--------------|----------------|-------------------------------|------------|----------|-----------------|------------|---------------------|---------------------|------------------------|---------------------|------------------------|----------------------|------------------------|
| Note | Société | Projet | Tâche parente | Tâches | Date début | Date fin | Progression | Total | Lundi 21/01/2019 | Mardi 22/01/2019 | Mercredi 23/01/2019 | Jeudi 24/01/2019 | Vendredi 25/01/2019 | Samedi 26/01/2019 | Dimanche 27/01/2019 |
| Rechercher <input type="text"/> | | | | | | | | | | | | | | | |
| TOTAL | | | | | | | | 2.25 | 0.25 | 1 | 1 | | | | |
| | | pj test 1 | t1 no ddate | | 02/01/2017 | | 126:00/-:--(-%) | 1 | | 1 | | | | | |
| | Other | PJT 2 | 203 | | 28/10/2017 | | 104:38/-:--(-%) | 1.25 | 0.25 | | 1 | | | | |
| TOTAL | | | | | | | | 2.25 | 0.25 | 1 | 1 | | | | |
| Note <div></div> | | | | | | | | | | | | | | | |

ENREGISTRER SOUMETTRE ANNULER Once

filled in the timesheet can be save (the same layout will be used) and modified later or submitted for approval if the approval is set in the module configuration



the start is used to show and (un)set favourite by one click

2.1 Notes:

There is 3 level of notes:

- User timesheet notes are per timesheet pages: might be useful for the team approver, those are the note in the bottom of the timesheet pages
- Task user timesheet note are per task line and per timesheet page: might be useful for the project approver, those are the note at the beginning of a line. Once open a modal box will open.
- Day notes are per day and task, those are saved in the core table: might be useful for the customer because they can be present on the attendance sheet, those are next to the time entry box

- Submitted timesheet

| << Précédent | | | | allez à: _____ | | | | <div><div></div></div> Maintenant | | Go | | Suivant >> | | | |
|---|---------|-----------|---------------|----------------|-----------------|----------|-------------|-----------------------------------|---------------------|---------------------|------------------------|---------------------|------------------------|----------------------|------------------------|
| Note | Société | Projet | Tâche parente | Tâches | Date début | Date fin | Progression | Total | Lundi 21/01/2019 | Mardi 22/01/2019 | Mercredi 23/01/2019 | Jeudi 24/01/2019 | Vendredi 25/01/2019 | Samedi 26/01/2019 | Dimanche 27/01/2019 |
| Rechercher _____ | | | | | | | | | | | | | | | |
| TOTAL | | | | | | | | 2.25 | 0.25 | 1 | 1 | | | | |
|  | | PJ test 1 | t1 no ddate | 02/01/2017 | 126:00/-:--(-%) | 1 | | 1 | 1 | | | | | | |
|  | Other | PJT 2 | 203 | 28/10/2017 | 112:38/-:--(-%) | 1.25 | 0.25 | | | 1 | | | | | |
| TOTAL | | | | | | | | 2.25 | 0.25 | 1 | 1 | | | | |
| <div>RÉOUVRI</div> | | | | | | | | | | | | | | | |

[RÉOUVRI](#)

Once submitted, only the task with time spent entered when it was “submitted” will be shown, the colour of the line background enables to have a quick idea of the timesheet status (colours can be changed in the module config page).

The timesheet will also appear in the “timesheet to approve” of his managers (N+1 & N+2 based on Dolibarr organization chart, the manager should also have the approver right Admin>User>Rights>timesheet>Approver)

The user can recall his timesheet to make change until the timesheet is approved

When the timesheet is under approval (eg. project approval activated), the user can no longer recall it but the layout & colour will remain the same.

- Timesheet approved

| Project | Tasks | Monday 06/12/2017 | Tuesday 06/13/2017 | Wednesday 06/14/2017 | Thursday 06/15/2017 | Friday 06/16/2017 | Saturday 06/17/2017 | Sunday 06/18/2017 |
|---------------------|----------------------------------|----------------------|-----------------------|-------------------------|------------------------|----------------------|------------------------|----------------------|
| TOTAL | | 00:00 | 00:00 | 07:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| PJ1701-0002 - PJT 2 | TK1701-0003 - P2T1 end date only | 00:00 | 00:00 | 07:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| TOTAL | | 00:00 | 00:00 | 07:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| Note | | | | | | | | |
| vcxvcxkjljk | | | | | | | | |

Once the timesheet is approved, the user can't recall it anymore but he can still see what was approved (colours can be changed in the module config page). If for some reason the timesheet should be modified then it should be set back to draft via the timesheet admin view


- Timesheet rejected

| Project | Tasks | Monday 06/05/2017 | Tuesday 06/06/2017 | Wednesday 06/07/2017 | Thursday 06/08/2017 | Friday 06/09/2017 | Saturday 06/10/2017 | Sunday 06/11/2017 |
|---------------------|----------------------------------|----------------------|-----------------------|-------------------------|------------------------|----------------------|------------------------|----------------------|
| TOTAL | | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| PJ1701-0002 - PJT 2 | TK1701-0003 - P2T1 end date only | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| TOTAL | | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 |

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

The timesheet appears redetected (editable) only when the team leader will have rejected the timesheet, when a timesheet is challenged in the approval flow, it is sent back to the previous approval until the team leader rejected it (cf. challenged timesheet)

- Timesheet challenged

| | | | | | | | | |
|---------------------|----------------------------------|-----------------------------|-----------------------|---|------------------------|----------------------|------------------------|----------------------|
| << Previous Week | | Go to: <input type="text"/> | |  Now | Go | | Next week >> | |
| <div>All</div> | Favoris | Others | | | | | | |
| Project | Tasks | Monday 07/10/2017 | Tuesday 07/11/2017 | Wednesday 07/12/2017 | Thursday 07/13/2017 | Friday 07/14/2017 | Saturday 07/15/2017 | Sunday 07/16/2017 |
| | TOTAL | 08:00 | 09:00 | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| PJ1701-0002 - PJT 2 | TK1701.0003 - P2T1 end date only | 08:00 | 01:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| PJ1701-0002 - PJT 2 | TK1705.0005 - tache3 | 00:00 | 08:00 | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| | TOTAL | 08:00 | 09:00 | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 |

During the approval flow a task of a timesheet could be challenged (eg. by the project lead) but the timesheet won't be rejected directly, the decision remains on the team leader hand, the timesheet will appear again in the "timesheet to approved" and he could contact the project leader for more details.

CHRONOS PAGE

This page needs a special right attendance/chrono user right

This page aims to enable user to launch chrono to the task on which they are currently working.

| | |
|-------------|--|
| <div></div> | 00:00:00 Customer: Project: Task: |
|-------------|--|

the chrono could be started by clicking on the arrow next to the task

| | | | | | |
|--|-----------|---------------|------------|-----------------|---|
| | pj test 1 | ☆ t1 no ddate | 01/02/2017 | 126:00/-:--(-%) | ▶ |
|--|-----------|---------------|------------|-----------------|---|

Then the task details will be shown on the chrono

| | |
|---|--|
| <div><div></div><div>This is the note fields, the content is automatically saved every minute</div></div> | 00:01:40 Customer: Project: pj test 1 Task: t1 no ddate |
|---|--|

The chrono can be stop by clicking on the square next to the chrono or next to the task, starting the chrono for another task will automatically stop the running chrono for the user.

Once the chrono is stop the task and the time are added on the timespent for the day and task


Products | Services | Commercial | Billing | Payment | Bank | Cash | Accounting | Leads | Projects | HRM | Tools | Timesheet | FTP

Number of time spend modified :1

| | |
|-------------|--|
| <div></div> | 00:00:00 Customer: Project: Task: |
|-------------|--|

ATTENDANCE SHEETS

From the project report, attendances sheets can be generated (only after the report is launch on a specific project and for a specific month and year.)

**PMPD**
S . P . R . L

PJ1705-0003 - test
Start date : 08/01/2018
End date : 08/31/2018
Third party : Other

Collaborator: admintester admintester

| # | Date | Name | Task | h.m |
|---|------------|-------------------------|------------------------|-------|
| 0 | 08/06/2018 | admintester admintester | TK1709-0007 - task 1.1 | 01:00 |
| 1 | 08/07/2018 | admintester admintester | TK1709-0007 - task 1.1 | 01:00 |
| 2 | | Total | 02:00 | |

employee's signature


Customer's visa









10

TIMESHEET APPROVAL ADMIN ACCESS

To be able to modify the status of the timesheet, an admin page is available (see the users rights screenshots in the Approval section), even if all fields are editable it's not recommended to change anything beside the status and/or note (a task-time need to be in the correct week for the correct user to be taken into account in all the other screens)

- Timesheet approval admin list

 User's timesheet (0)

| User | Reference date | Status | |
|----------------------|-------------------------|----------------------|---|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |  |
| | | |  |
| SuperAdmin | 07/10/2017 (2017W28) | UNDERAPPROVAL |  |
| SuperAdmin | 07/17/2017 (2017W29) | UNDERAPPROVAL |  |
| SuperAdmin | 07/03/2017 (2017W27) | UNDERAPPROVAL |  |
| SuperAdmin | 07/01/2017 (2017W26_H2) | DRAFT |  |
| SuperAdmin | 06/26/2017 (2017W26_H1) | UNDERAPPROVAL |  |
| SuperAdmin | 07/24/2017 (2017W30) | UNDERAPPROVAL |  |

- Timesheet approval admin details

User's timesheet

Card

Linked files

Log

2017W28_1

Back to list

User

SuperAdmin

Reference date

07/10/20172017W28

Status

UNDERAPPROVAL

Note

SuperAdmin - 2017W28

| Project | Tasks | Monday 07/10/2017 | Tuesday 07/11/2017 | Wednesday 07/12/2017 | Thursday 07/13/2017 | Friday 07/14/2017 | Saturday 07/15/2017 | Sunday 07/16/2017 |
|---------------------|----------------------------------|----------------------|-----------------------|-------------------------|------------------------|----------------------|------------------------|----------------------|
| | TOTAL | 08:00 | 09:00 | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| PJ1701-0002 - PJT 2 | TK1701-0003 - P2T1 end date only | 08:00 | 01:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| PJ1701-0002 - PJT 2 | TK1705-0005 - tache3 | 00:00 | 08:00 | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| | TOTAL | 08:00 | 09:00 | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 |

Update

Delete

• approval admin edit

Timesheet

User's timesheet

User

SuperAdmin

Reference date

07/10/2017

Status

UNDERAPPROVAL

Note

Update

Cancel

TIMESHEET ATTENDANCE ADMIN ACCESS

Chrono (58) 1 2 3 >

| Date | Event location | Event type | Note | User | Third Party | Task | Project | Token | Status |
|----------------------|---------------------------------|----------------------|--|-------------------------------|----------------------|-------------------------|-----------------------|---------------------------------|----------------------|
| 01/23/2019 15:01 | Browser:50100646464020100101640 | checkin | This is the note fields, the co | SuperAdmin (All entities) | | TK1701-0001-t1 no ddate | PJ1701-0001-qj test 1 | | add |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | team member 1 (Master entity) | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 01/23/2019 03:17 PM | Browser:50100646464020100101640 | Heartbeat | | team member 1 | | TK1701-0001 | PJ1701-0001 | gAFhgXWfY5h38a4bulxGKG3dghBRhm3 | |
| 01/23/2019 03:01 PM | Browser:50100646464020100101640 | Heartbeat | This is the note fields, the content is automatically saved every minute | SuperAdmin | | TK1701-0001 | PJ1701-0001 | | |

This screen can be used to correct a checkout time or to add a missing start or stop

FAVOURITE

The favourite (white list & black list) enable a filtering the task list on the timesheet page so one can remove project/task from the default list

The behaviour can be set in the setup page: favourite, all but favourite or all by default

Additionally, there is an option for the deactivation of this feature.


- **Favourite list**

 Black / White list (1)

| User | Project | Task | Subtask | Start date | End date | |
|----------------------|-------------------------|----------------------|----------------------|----------------------|----------------------|---|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| SuperAdmin | PJ1701-0001 - pj test 1 | NuLL | 0 | | |  |

This view show the current favourite list, one can remove easily items if not needed anymore.

- **New favourite item**

 Black / White list

| | |
|------------|--|
| User | <input type="text" value="tester"/> |
| Project | <input type="text" value="PJ1701-0001 - pj test 1"/> |
| Task | <input type="text" value="TK1701-0001 - t1 no ddate"/> |
| Subtask | <input type="text"/> |
| Start date | <input type="text"/> |
| End date | <input type="text"/> |

Add one item to the favourite list by setting those parameters:

User: user to whom the item will be applied, Admin can choose it but the normal user can only set favourite list for themselves

Project / Task / subtask: define the target of the favourite list item, only project is mandatory; to apply the item to a specific task and its subtask is optional;

Start Date/ End date: define the timesheet timespan when the item should be taken into account. No date means no time limits






APPROVAL:

There is two types of approvals; the team approval and the “other” approval, the difference is that the team approval shows all the tasks for a week and for one user when the other approval shows only the task that concern the approver (ie. a project leader should only see the time spent on his projects not on the others.)

The timesheet module approval feature takes the assumption that the team leader is the responsible for the team resources management therefore only the team manager can send back the timesheet to the user.

In order to have access to approve his subordinate’s timesheets one should have the timesheet approver rights

- **Timesheets rights**

| | | |
|---|---|-----------------|
|  Timesheet | + | TeamApprover |
|  Timesheet | + | ApprovalAdmin |
|  Timesheet | + | Export read |
|  Timesheet | + | AttendanceUser |
|  Timesheet | + | AttendanceAdmin |

ApprovalAdmin can access approvals and favourites for all.

ExportRead enable the access to all files (pdf) generated by the module

TeamApprover enable the user to approve the timesheet of his subordinates.

AttendanceUser has access to the attendance page

AttendanceAdmin has access to attendance admin page

- **Timesheet approval: team leader**

The team approval screen can show the timesheet grouped per user, per week or per user/month, the maximum number of timesheets shown per page can be set in the module setup page.

Eg: timesheet per month.

Team

Project

<< Previous

Go to: SuperAdmin 07/2017 Go

Next >>

SuperAdmin - Week 27 (07/2017)

| Project | Tasks | Monday 07/03/2017 | Tuesday 07/04/2017 | Wednesday 07/05/2017 | Thursday 07/06/2017 | Friday 07/07/2017 | Saturday 07/08/2017 | Sunday 07/09/2017 |
|---------------------|----------------------------------|----------------------|-----------------------|-------------------------|------------------------|----------------------|------------------------|----------------------|
| PJ1701-0002 - PJT 2 | TK1701-0003 - P2T1 end date only | 08:00 | 08:00 | 00:00 | 08:00 | 08:00 | 00:00 | 00:00 |
| PJ1701-0002 - PJT 2 | TK1705-0005 - tache3 | 00:00 | 00:00 | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| TOTAL | | 08:00 | 08:00 | 08:00 | 08:00 | 08:00 | 00:00 | 00:00 |

APPROVED

REJECTED

SUBMITTED

SuperAdmin - Week 28 (07/2017)

| Project | Tasks | Monday 07/10/2017 | Tuesday 07/11/2017 | Wednesday 07/12/2017 | Thursday 07/13/2017 | Friday 07/14/2017 | Saturday 07/15/2017 | Sunday 07/16/2017 |
|---------------------|----------------------------------|----------------------|-----------------------|-------------------------|------------------------|----------------------|------------------------|----------------------|
| PJ1701-0002 - PJT 2 | TK1701-0003 - P2T1 end date only | 08:00 | 01:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| PJ1701-0002 - PJT 2 | TK1705-0005 - tache3 | 00:00 | 08:00 | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| TOTAL | | 08:00 | 09:00 | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 |

APPROVED

REJECTED

SUBMITTED

SuperAdmin - Week 29 (07/2017)

| Project | Tasks | Monday 07/17/2017 | Tuesday 07/18/2017 | Wednesday 07/19/2017 | Thursday 07/20/2017 | Friday 07/21/2017 | Saturday 07/22/2017 | Sunday 07/23/2017 |
|---------------------|----------------------------------|----------------------|-----------------------|-------------------------|------------------------|----------------------|------------------------|----------------------|
| PJ1701-0002 - PJT 2 | TK1701-0003 - P2T1 end date only | 08:00 | 08:00 | 08:00 | 08:00 | 08:00 | 00:00 | 00:00 |
| TOTAL | | 08:00 | 08:00 | 08:00 | 08:00 | 08:00 | 00:00 | 00:00 |

APPROVED

REJECTED

SUBMITTED

SuperAdmin - Week 30 (07/2017)

| Project | Tasks | Monday 07/24/2017 | Tuesday 07/25/2017 | Wednesday 07/26/2017 | Thursday 07/27/2017 | Friday 07/28/2017 | Saturday 07/29/2017 | Sunday 07/30/2017 |
|---------------------|----------------------------------|----------------------|-----------------------|-------------------------|------------------------|----------------------|------------------------|----------------------|
| PJ1701-0002 - PJT 2 | TK1701-0003 - P2T1 end date only | 00:00 | 00:00 | 08:00 | 08:00 | 08:00 | 00:00 | 00:00 |
| PJ1701-0002 - PJT 2 | TK1705-0005 - tache3 | 08:00 | 08:00 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 |
| TOTAL | | 08:00 | 08:00 | 08:00 | 08:00 | 08:00 | 00:00 | 00:00 |

APPROVED

REJECTED

SUBMITTED

SuperAdmin - Week 31 (07/2017)

| Project | Tasks | Monday 07/31/2017 |
|---------------------|----------------------------------|----------------------|
| PJ1701-0002 - PJT 2 | TK1701-0003 - P2T1 end date only | 08:00 |
| TOTAL | | 08:00 |

APPROVED

REJECTED

SUBMITTED

Next

Timesheet approval: other

Team

Project

<< Previous

Go to: PJT 2- Week 31 (08/2017) #4

Go

Next >>

| Approval | Note | Task | User | Tuesday 08/01/2017 | Wednesday 08/02/2017 | Thursday 08/03/2017 | Friday 08/04/2017 | Saturday 08/05/2017 | Sunday 08/06/2017 |
|----------|------|----------------------------------|------------|-----------------------|-------------------------|------------------------|----------------------|------------------------|----------------------|
| | | TK1705-0005 - tache3 | tester | 00:00 | 08:00 | 08:00 | 00:00 | 00:00 | 00:00 |
| | | TK1701-0003 - P2T1 end date only | tester | 08:00 | 00:00 | 00:00 | 08:00 | 00:00 | 00:00 |
| | | TK1705-0005 - tache3 | SuperAdmin | 00:00 | 08:00 | 08:00 | 00:00 | 00:00 | 00:00 |
| | | TK1701-0003 - P2T1 end date only | tester | 08:00 | 00:00 | 00:00 | 08:00 | 00:00 | 00:00 |

Note

HERE you can put your note

Submit/Next

other approvals are showed by week, the number of item to approve is indicated by the '#' in the drop down list.

The approval is done by line by clicking on the ?

- ? means no change,
- means approved
- and mean rejected.

Note section will appear when the user will click on the icon in the note column, when a note is saved it will appear as an info as shown in the screenshot.

User report

A limited report by user is available by month (in timesheet main tab), several layouts are possible, if both short and export friendly are chosen then the export friendly will be shown.

Note: the search ribbon appears in every layout but only the normal layout screenshot shows it.

• User report: Normal layout:

| | | | | | | |
|---------------|------|--------|---|--|--|------------------------------------|
| Utilisateur | Mois | | | | | |
| team member 1 | Fév. | - 2019 | <input type="checkbox"/> Version courte | <input type="checkbox"/> Compatible export | <input checked="" type="radio"/> Projet / Tâche / Date <input type="radio"/> Projet / Date / Tâche <input type="radio"/> Date / Projet / Tâche | Obtenir le rapport |

team member 1, février

| Projet | Tâches | Jour | Durée:heures | Durée:Jours | Note |
|-----------|-------------|------------|--------------|-------------|------|
| | TOTAL | | 65:36 | 8.2 | |
| pj test 1 | | | 32:00 | 4 | |
| | t1 no ddate | | 32:00 | 4 | |
| | | 05/02/2019 | 8:00 | 1 | |
| | | 13/02/2019 | 8:00 | 1 | |
| | | 19/02/2019 | 8:00 | 1 | |
| | | 26/02/2019 | 8:00 | 1 | |
| PJT 2 | | | 33:36 | 4.2 | |
| | 203 | | 33:36 | 4.2 | |
| | | 06/02/2019 | 8:00 | 1 | |
| | | 07/02/2019 | 8:00 | 1 | |
| | | 12/02/2019 | 8:00 | 1 | |
| | | 18/02/2019 | 1:36 | 0.2 | |
| | | 25/02/2019 | 8:00 | 1 | |

• User report: Export friendly layout

| Nom | Projet | Tâches | Jour | Durée:heures | Durée:Jours |
|---------------|-----------|-------------|------------|--------------|-------------|
| team member 1 | pj test 1 | t1 no ddate | 05/02/2019 | 8:00 | 1 |
| team member 1 | pj test 1 | t1 no ddate | 13/02/2019 | 8:00 | 1 |
| team member 1 | pj test 1 | t1 no ddate | 19/02/2019 | 8:00 | 1 |
| team member 1 | pj test 1 | t1 no ddate | 26/02/2019 | 8:00 | 1 |
| team member 1 | PJT 2 | 203 | 06/02/2019 | 8:00 | 1 |
| team member 1 | PJT 2 | 203 | 07/02/2019 | 8:00 | 1 |
| team member 1 | PJT 2 | 203 | 12/02/2019 | 8:00 | 1 |
| team member 1 | PJT 2 | 203 | 18/02/2019 | 1:36 | 0.2 |
| team member 1 | PJT 2 | 203 | 25/02/2019 | 8:00 | 1 |

• User report: Short layout

team member 1, février

| Projet | Tâches | Durée:heures | Durée:Jours | Note |
|-----------|-------------|--------------|-------------|------|
| TOTAL | | 65:36 | 8.2 | |
| pj test 1 | | 32:00 | 4 | |
| | t1 no ddate | 32:00 | 4 | |
| PJT 2 | | 33:36 | 4.2 | |
| | 203 | 33:36 | 4.2 | |

PROJECT REPORT

A limited report by project is available by month (in project main tab), several layouts are possible like for user reports, once the report is generated,

- A button appears to start the invoice creation based on this report.
- A button appears to generate the attendances sheet related to the report generated.

Note: the search ribbon appears in every layout but only the normal layout screenshot shows it.

The “Only invoiceable task” option will take only the task that are defined as invoiceable in the task card.

• Project report: Normal layout

| Project | Start date | End date | Short version | Only invoiceable tasks | Export friendly | Mode |
|--|-------------------------------|-------------------------------|--------------------------|--------------------------|--------------------------|---|
| PJ1701-0001 - pj test 1 | 12/01/2018 <small>Now</small> | 12/31/2018 <small>Now</small> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="radio"/> User / Task / Date <input type="radio"/> User / Date / Task <input type="radio"/> Date / User / Task |
| <div> <div>GET REPORT</div> <div>INVOICE</div> <div>PROJECT RESOURCES' ATTENDANCE SHEET</div> </div> | | | | | | |
| PJ1701-0001 - pj test 1, 12/01/2018-12/31/2018 | | | | | | |
| User | Tasks | Day | Duration:hours | Duration:Days | Note | |
| TOTAL | | | 25:00 | 3.125 | | |
| team member 1 | | | 25:00 | 3.125 | | |
| | tf no ddate | | 25:00 | 3.125 | | |
| | | 12/03/2018 | 8:00 | 1 | | |
| | | 12/04/2018 | 8:00 | 1 | | |
| | | 12/05/2018 | 1:00 | 0.125 | | |
| | | 12/06/2018 | 8:00 | 1 | | |

• Project report: Export friendly layout

| Name | User | Tasks | Day | Duration:hours | Duration:Days |
|-------------------------|---------------|-------------|------------|----------------|---------------|
| PJ1701-0001 - pj test 1 | team member 1 | tf no ddate | 12/03/2018 | 8:00 | 1 |
| PJ1701-0001 - pj test 1 | team member 1 | tf no ddate | 12/04/2018 | 8:00 | 1 |
| PJ1701-0001 - pj test 1 | team member 1 | tf no ddate | 12/05/2018 | 1:00 | 0.125 |
| PJ1701-0001 - pj test 1 | team member 1 | tf no ddate | 12/06/2018 | 8:00 | 1 |

- **Project report: Short layout**

PJ1701-0001 - pj test 1, 12/01/2018-12/31/2018

| User | Tasks | Duration:hours | Duration:Days | Note |
|---------------|-------------|----------------|---------------|------|
| TOTAL | | 25:00 | 3.125 | |
| team member 1 | | 25:00 | 3.125 | |
| | t1 no ddate | 25:00 | 3.125 | |

PROJECT INVOICE

This module enables the creation of an invoice based on the time spent. The time spent can be grouped by user, by task or by user and task to convert the sum of the time spent in quantity of existing services, or one-time services (only for the invoice, not saved) or to not be invoiced.

Prerequisite: the user making the invoice must be part of the project, have right to make invoice and able to see the customer to bill.

In order to achieve it, there is two steps before the draft invoice creation.

- **First invoice step: the general project's invoice parameters**

| General parameters for the project's invoice | |
|--|--|
| Project | PJ1701-0001 pj test 1 |
| Start date | 12/01/2018 Now |
| End date | 12/31/2018 Now |
| Invoicing method | <input type="radio"/> Tasks <input type="radio"/> User <input checked="" type="radio"/> Tasks & User |
| Customer | ▼ |
| Timesheet to invoice | <input type="radio"/> only approved <input checked="" type="radio"/> All |
| Include only timesheet not invoiced | <input type="checkbox"/> |
| Only invoiceable tasks | <input type="checkbox"/> |
| NEXT | |

in this screen, the project, the dates, the customer, the grouping method, invoiceable task need to be defined, if one comes from the report the same value should be checked.

- **Second Invoice step: assignation of service to each time spent group**

This screen will define what will be shown in the invoice.

The “Existing” field

Services defined in Product/service menu could be used. This field is a search box, just typing text in it will fetch services with a name close to the text entered. the service consumption will be updated correctly as for a normal invoice where an existing service is used. This field can have a default value, this value can come from different places:

- If there is a default service defined on the **task** card, this one will be used
- if not and If there is a default service defined on the **user** card, this one will be used
- if not and If there is a default service defined on the **module setup**, this one will be used

the “New” fields

If something is entered in those fields then an ad-hoc service will be used with the price & VAT specified in the different columns.

| Selection of the services to invoice | | | | | | | |
|--------------------------------------|--------------------------------|-------------------|-----------------|-------------|-----------|--|----------------|
| User | Task | Existing:Service | New:Description | New:PriceHT | Sales tax | Quantity per unit | Saved duration |
| - | TK1701-0003 P2T1 end date only | Don't invoice it. | | | 0% | <div>1</div> <div> <input type="radio"/> Hour <input checked="" type="radio"/> Days </div> | 196:00 |
| - | TK1705-0005 tache3 | Don't invoice it. | | | 0% | <div>1</div> <div> <input type="radio"/> Hour <input checked="" type="radio"/> Days </div> | 57:00 |

Next

The two last columns are used to generate the quantity of the service that will be invoiced. The duration of the time spent on task are shown in the column “Saved duration” and it will be converted based on quantity based on the Quantity per unit column. If day is selected, the calculation will use the hours per day set in the module setup page. The quantity is editable

Example:

196 hours, with 1 day (8 h) as Quantity per unit will make a quantity of $196/(1*8) = 24,5$.

in the Latest Dolibarr, once the invoice is created the time spend will be linked to the invoice and invoice line (information not used today)

PERMISISSONS

there is 10 permisissions grouped by area

11.1 Timesheet

- user :
 - enable time entry on timesheet and subordinate timesheet if “add for other” is activated.
 - enable access to user favourites.
- admin :
 - enable time entry on any user timesheet.
 - enable access to all user favourites.

11.2 Chrono

- user:
 - enable time entry on user chrono.
 - enable access to user favourites.
- admin:
 - enable time entry on any user chrono.
 - enable access to all user favourites.

11.3 Approval

- team:
 - enable the user to acces the approval page for its subordinates
- project:
 - enable the user to access project approaval page fro the project where he has a LEADER role
- admin:
 - access all approval pages for all users

11.4 reports

- user:
 - enable access to user report, the user available are the subordinate or all if admin, chrono admin or timesheet admin rodolphe
- project:
 - enable project report, list of project depend on project where the user is BILLING or LEADER. The admin and users with the right to access and modify all project will have access to all project
- admin:
 - enable reports for all project and users.

HOLIDAY

based on the setup the timesheet page will (there is settings for holiday and public holiday):

- show the paid and public holiday above the timesheet entry boxes
- add day duration (in settings) on the total for a day
- block time entry on full holiday day (am and pm)