



T.Rex Administration Manual

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- Create users
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- Further information and support

T.Rex administration:

T.Rex administration keeps track of your company's different projects. Here you can create new users, roles and customers. Follow this link to enter T.Rex Administration: <http://trexcloud.d60.dk/administration/>.

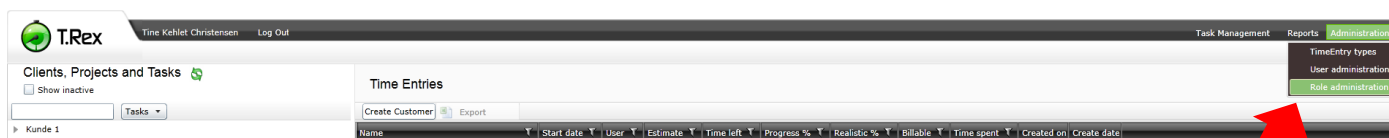
You can use the administration module to get an overview of the different projects in your company, as well as their time consumptions. As you click the different tasks, they will appear with information about calculated time consumption.

The screenshot shows the T.Rex Administration interface. On the left, there is a sidebar with 'Clients, Projects and Tasks' and a tree view showing 'Kunde 1' > 'Projekt 1'. The main area displays a table of 'Time Entries'.

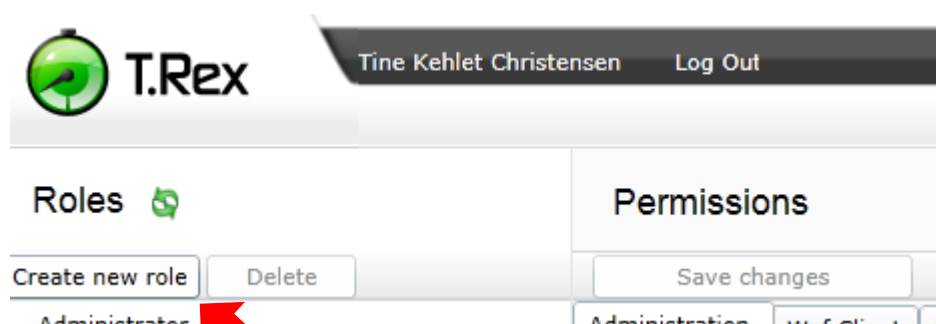
Name	Start date	User	Estimate	Time left	Progress %	Realistic %	Billable	Time spent	Created on	Create date
Kunde 3	07-02-2012 07:47	Tine Kehlet Christensen	0	0	0	0	0,00	0,00		
Kunde 1	06-02-2012 13:06	Lærke Eg Nørmark	0	0	0	0	16,03	0,00		
Projekt 1	06-02-2012 13:33	Lærke Eg Nørmark	0	0	0	0	16,03	0,00		
Opgave x	06-02-2012 13:35	Lærke Eg Nørmark	0	0	0	0	5,00	0,00		
Opgave XX	06-02-2012 13:37	Lærke Eg Nørmark	0	0	0	0	11,03	0,00		

Create roles

In the T.Rex administration module you are able to create roles and assign specific rights to each role, depending on which function the user has in the system. In order to create the roles you need to click: Administration > Role administration at the upper-right corner of the screen.



You create a role by clicking on: "Create new Role".

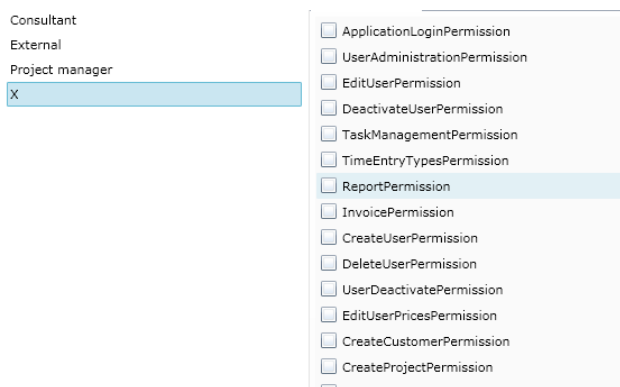


In the pop-up window you type the name of the role.



A dialog box titled "Create new role" with a text input field labeled "Role name" containing the character "x". At the bottom are "Ok" and "Cancel" buttons.

The roles you have created will appear in the left side of the screen. By clicking on each role you will have the opportunity to assign rights. Do not forget to save every time you have made a change. In this way, you will make sure that the changes are registered in the system.



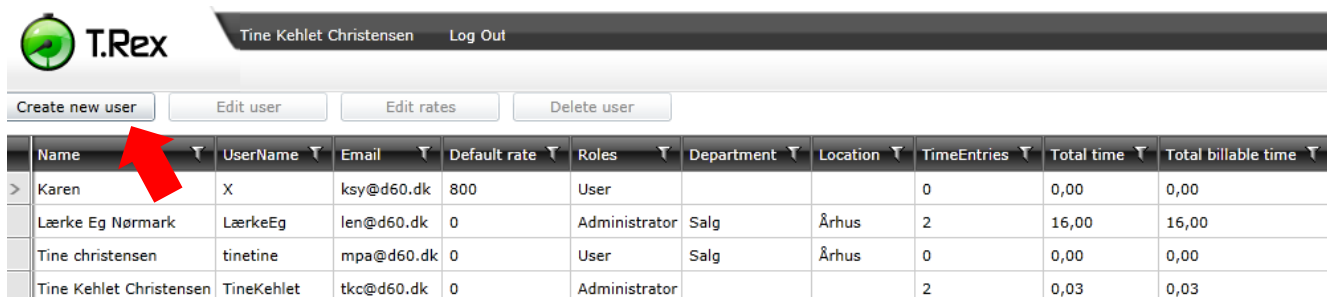
The interface shows a list of roles on the left: Consultant, External, Project manager, and a role with a blue highlight and an "x". To the right is a list of permissions with checkboxes, including ApplicationLoginPermission, UserAdministrationPermission, EditUserPermission, DeactivateUserPermission, TaskManagementPermission, TimeEntryTypesPermission, ReportPermission (highlighted), InvoicePermission, CreateUserPermission, DeleteUserPermission, UserDeactivatePermission, EditUserPricesPermission, CreateCustomerPermission, and CreateProjectPermission.

Create users

Before the users can start registering their time in T.Rex, they have to be created in the system by an administrator through the administration module. This module is found in the right corner at the top navigation under: Administration > User administration.



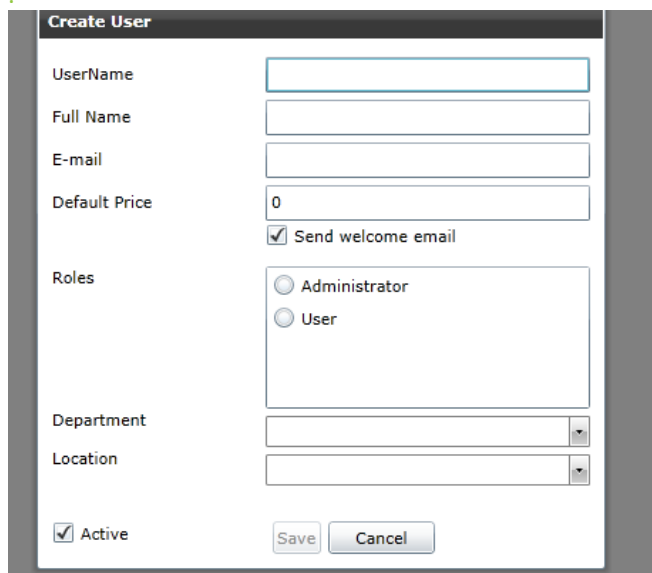
You create users by clicking on: "Create new user".



The screenshot shows the "User administration" interface with buttons for "Create new user", "Edit user", "Edit rates", and "Delete user". A red arrow points to the "Create new user" button. Below the buttons is a table of users.

	Name	UserName	Email	Default rate	Roles	Department	Location	TimeEntries	Total time	Total billable time
>	Karen	X	ksy@d60.dk	800	User			0	0,00	0,00
	Lærke Eg Nørmark	LærkeEg	len@d60.dk	0	Administrator	Salg	Århus	2	16,00	16,00
	Tine christensen	tinetine	mpa@d60.dk	0	User	Salg	Århus	0	0,00	0,00
	Tine Kehlet Christensen	TineKehlet	tkc@d60.dk	0	Administrator			2	0,03	0,03

When you create a new user in the system, you need to assign the user one of the roles you have defined in the system. Furthermore you need to type in the hourly rate of the user and define the apartment he is employed, including the location e.g. Aarhus or Copenhagen.



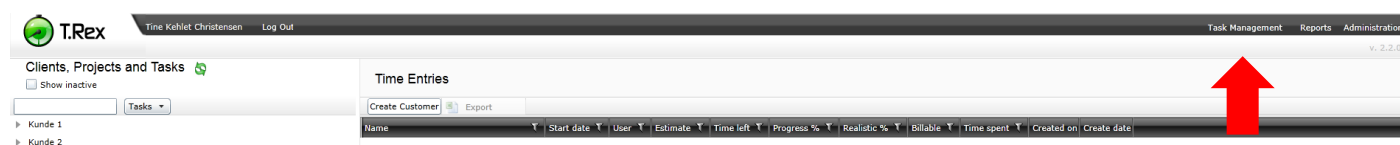
The 'Create User' form contains the following fields and options:

- UserName: Text input field
- Full Name: Text input field
- E-mail: Text input field
- Default Price: Text input field with value '0'
- ☒ Send welcome email
- Roles: Radio button selection with options 'Administrator' and 'User' (selected)
- Department: Dropdown menu
- Location: Dropdown menu
- ☒ Active
- Save and Cancel buttons

The information will be saved in T.Rex administration regarding generation of reports etc. Do not remove the check mark in the box "Send welcome email". The user is dependent on the email to get the typed information and the password to T.Rex.

Create customers

Every customer has to be created before the users can register their time in T.Rex. You create the customer in the administration module by clicking "Task Management" at the upper-right corner of the top navigation.



You create customers by clicking on "Create Customer".



A pop-up window will appear in which you can type the information about your client.

Edit Customer

Name

Streetaddress

Address2

Zipcode/City

Country

Contact name (Invoice reciever)

Contact phone

Contact E-mail

Payment terms days ☐ Include current month

After the customer has been created, tasks can be added to every customer by clicking on “Add project”.

T.Rex Time Kehlet Christensen Log Out

Clients, Projects and Tasks

☐ Show inactive

Tasks

Kunde 1

Kunde 2

kunde 3

Time Entries

Create Customer Edit Customer Add Project Delete Edit Time entry types Export

Name	Start date	User	Estimate	Time left	Progress %	Realistic %	Billable
▲ Kunde 1	06-02-2012 13:06	Lærke Eg Nørmark	0	0	0	0	16,03
▶ Projekt 1	06-02-2012 13:33	Lærke Eg Nørmark	0	0	0	0	16,03
kunde 3	07-02-2012 07:47	Tine Kehlet Christensen	0	0	0	0	0,00

In every project specific tasks can be added by clicking “Add task”. The users are able to register their time here.

T.Rex Time Kehlet Christensen Log Out

Clients, Projects and Tasks

☐ Show inactive

Tasks

Kunde 1

Kunde 2

kunde 3

Time Entries

Create Customer Edit project Add task Delete Export

Name	Start date	User	Estimate	Time left	Progress %
▲ Kunde 1	06-02-2012 13:06	Lærke Eg Nørmark	0	0	0
▶ Projekt 1	06-02-2012 13:33	Lærke Eg Nørmark	0	0	0
▲ kunde 3	07-02-2012 07:47	Tine Kehlet Christensen	0	0	0
project 1	07-02-2012 07:48	Tine Kehlet Christensen	0	0	0

Reports

You constantly have the possibility to withdraw reports in T.Rex. The reports are available in the upper-right corner of the screen: Reports > Interactive report

T.Rex Time Kehlet Christensen Log Out

Task Management **Reports** Administration

Clients, Projects and Tasks

☐ Show inactive

Tasks

Kunde 1

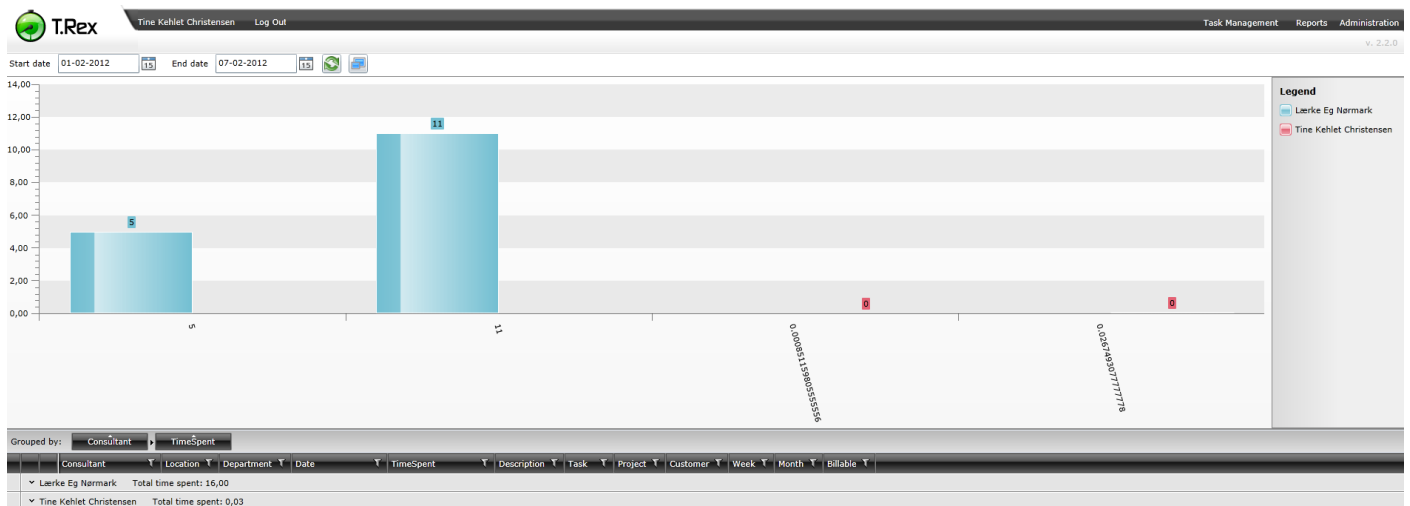
Kunde 2

Time Entries

Create Customer Edit project Add task Delete Export

Name	Start date	User	Estimate	Time left	Progress %	Realistic %	Billable	Time spent	Created on	Create date
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The report module is interactive. According to which reading you need, you can click on the relevant columns below the table and draw the information needed.



For further Information and Support

You will find more information and support on T.Rex's support site: <http://trexsales.d60.dk/home.aspx>

If you need any help concerning the use of T.Rex Administration, you are very welcome to contact:

d60, support@d60.dk