krooe

Tutorial

Time, Tasks and Milestones

Krooe.com/Home/Signup.aspx

1. Enter your organization information in top portion.
2. Enter [Krooe Administrator username] which you earlier assigned in [KrooeAdministrator] group in Active Directory. Krooe will automatically populate FirstName, LastName and email address from Active Directory.
3. Enter Active Directory password and verify password of [Krooe Administrator user]. This should be active directory password of Krooe administrator user.
4. Enter First Name, Middle Name and Last Name.
5. Click on [Signup] to complete Active directory integration steps.
6. This administrator can now sign-in in Krooe using his [Krooe Admin] (Chibuk Productions Inc. in above case) active directory username and password.
7. Now administrator can add other employees using [Administration]-->[Employees] option by specifying AD user name in [User name] field.
8. New employee will be automatically add if they are member AD Group whose mapping is defined with Krooe roles.

Krooe tools:

These are the top level tools of Krooe timesheet suite:

1. Employee Timesheet Management
    1. Time entry using two format: Daily and weekly
    2. Timesheet and expense approval (customizable timesheet approval path by defining work-flow path)
    3. Allow external users (client) to approve their own project timesheet entered by employees.
2. Billing management

    Three different types of billing rate types configurable at project level. Billing rate can be define with its applicable date range with complete history. Timesheet then pick billing rate based on timeentry date from billing rate history defined at employee level, project role level or project employee level.

    Different billing rate options:
    - Employee own billing rate (System should pick employee own billing rate)
    - Project based employee billing rate (System pick employee billing rate defined for each project separately)
    - Role based billing rate (System pick billing rate of employee based on role wise billing rate defined for each project separately)
    - Task based billing rate (System pick billing rate of time entry which is defined in task's billing rate)
3. Employee Attendance
    1. Punch in / punch out
    2. Leave records (sick leave, casual leave etc)
4. Expense entry
    - Multi currency expense entry tracking with currency conversion.
    - Defining of exchange rate history for each currency.
    - Tax calculation with customizable formulas.
    - Expense reimbursement management and tracking.
5. Task Management
    0. Project manager, team leads, employee can create tasks for their project and can assign those tasks to multiple users. And then whole team which is assigned in that particular task can do these task management activities.
        - Can add their own comments.
        - Can attach files at task level
        - Can change status

Using Menus:

You can use the Krooe left side menu bar at the left of the page and top menus to navigate through the application based on the type of work you are doing. Each item is only available to a user if they have been given access to the features within that menu, based on their role based permissions.

Contact your system administrator if you do not know your organization's Krooe URL. This URL is dependent upon your server type and name, and the server's port number.

To ensure full functionality of the application, you should allow pop-ups for the Krooe website.

Types of Menus:

There are three types of menus and options available in Krooe:

1. Top navigation menu:
    - My Area
    - Tasks
    - Projects
    - Timesheet
    - Expenses
    - Reports
2. Left hand side navigation menus (hierarchy)
    - Home
        - My Area (My area options include all employees own daily routine options like adding tasks, timesheet entry, expense entry, profile, personal reports etc)
            - My Tasks (To add and list of employee own task. Employee can then search other employee task also using this page)
            - My Profile (To change profile, password and other personal information)
            - My Projects (Show only those projects in which you are assigned)
            - My Timesheet (Show daily timesheet of a employee. You can switch week view of timesheet by clicking on WeekView of timesheet)
            - My Expense Entries (Show daily expense entries. It allow allow to add new expense entry records)
            - My Reports (Show main reporting page)

- Project Management (Project management area includes different project management pages like approval of timesheet and expenses)
    - Timesheet Approval (Timesheet approval page)
    - Expense Approval (expense approval page)
- Administration (All system administration options)
    - Admin options (This page will launch main administration page). Admin options further have these sub options to manage and configure TimeSheet solution.
        - Organization Setup
            - Locations (To manage locations (branches) of your organization.
            - Departments (To manage departments of your organization)
            - Roles (To manage organization roles of your organization)
            - Working Days (Setting up working days in your organization)
            - Task Type (Setting and customizing task types)
            - Priorities (setting and customizing priorities of tasks)
            - Role based permission (setting of access rules of application features on application roles)
        - Timesheet / Project / Billing Setup
            - Billing types (billing types setup)
            - Absence types (configure types of absence in your organization)
            - Project types (configure types of project in your organization)
            - Preferences (Timesheet, organization, billing, internationalization preferences)
            - External Users (Configuring external users through which you can allow client to approve their own project timesheet using Krooe system).
            - External Users (Configuring external users through which you can allow client to approve their own project timesheet using Krooe system)
        - Expenses Setup
            - Expense Types (configure types of expenses)

        - Expenses (configure expense code as per your organization needs)
        - Currencies (configure currencies and exchange rates)
        - Tax Code (configure tax code and their calculation formulas)
        - Payment Method (configure payment method and define your own custom payment method)
    - Archive
        - Time Entry Archive (Archive of all timesheet records)
        - Expense Entry Archive (Archive of all expense entry records)
    - Import / Export
        - Import / Export (CSV) (Importing and exporting of all types of Krooe data to CSV files)
- Clients (To manage clients of your organization)
- Employees (To manage employees of your organization)
- Projects (To manage projects of your organization)

Understanding the Workflow:

The following diagram explains the general flow of work in Krooe.

1. Create projects and tasks and assign project teams, rates and billing options to allow users to enter billable and non-billable time and expenses. You will be able to track all time and expenses to calculate project costs and ensure accurate client billing.
2. Create generalized tasks with [All Employee Task] and [All Project Task] checked. Generalized tasks doesn't require any assignment. Generalized tasks appear for all projects in time entry.
3. Employee complete their timesheets by entering time against projects or time off codes. Users can enter time only for those tasks for which they are part of the task team. All time is either billable or non-billable. Once completed, users submit their timesheets for approval.
4. Once submitted, users' timesheets are sent to the appropriate project leaders, clients, and supervisors for approval. Approvers can approve or reject the timesheets. Approved timesheets are closed so the data can be processed.

5. Any user with report access can generate reports to review data in the system including project status, timesheet status, billing, time off, and utilization.

How to perform quick setup steps:

Following are 4 steps process which will allow you to get started using Krooe. For more detail information for each of the setup, click on their corresponding link to open its detail help.

1. Creating employees:
    - After creating of employee record by administrator, employees can login in Krooe and can do their activities
2. Creating of Projects:
    - Time entry and expense entry can only be entered for a project tasks.
    - So you must have project setup before adding any task for your projects.
    - You should also assign your project team in order to allow your team to enter time entry record of a particular project.
3. Creating of Tasks:
    - You can add tasks in your project and you can assign those tasks to employee.
    - Only tasks which are assigned to an employee will be appear in time entry page for entering time entry record

Project Setup:

A project is a framework (structure) used to organize work-group tasks. Projects identify the body of work to be completed by a team within your organization. Projects can have multiple levels and complexities, depending on the needs of your organization.

How Project Work:

The Krooe allows you to define projects to enter time and expenses against, as follows:

1. A project manager adds a project to Krooe, specifying the client the project is being completed for, if applicable.
2. The project manager specifies who will be working on the project.
3. If the project is being billed to a client, the project manager sets the billing rates for the project.
4. The project manager creates tasks within the project and enters estimates.

5. The project manager specifies which expenses can be claimed under the project.
6. When entering time on their timesheet, users working on the project allocate their time against the project and task. Users also select the project when entering expenses.
7. The costs and billing charges associated with the time and expenses are automatically calculated by the system.
8. Time and expenses can be exported for client billing. Additionally, the project manager can periodically review the actual costs against the estimates, to ensure the project is on track.

Management of Projects is located under (<Left Navigation Menu>--><Administration>--><Projects>).

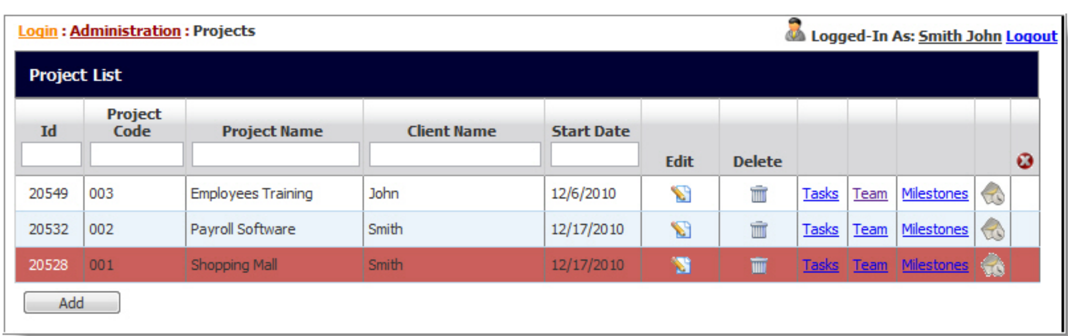
The system allows you to create an unlimited number of projects for users to log their time, expenses, and mileage against. The system uses a hierarchical tasks structure and allows unlimited levels of tasks under any parent project. The main Project screen serves as the master control panel for all project creation, modification, and deletion.

Working with Projects List Page

The Projects page provides a list of projects defined within Krooe. Projects can be added, edited, or deleted from this page.

The Project setup is divided into the following sections:

- Project Information
- Team Lead / project manager information
- Billing type / billing rates
- Project Team



Id	Project Code	Project Name	Client Name	Start Date	Edit	Delete					
20549	003	Employees Training	John	12/6/2010			Tasks	Team	Milestones		
20532	002	Payroll Software	Smith	12/17/2010			Tasks	Team	Milestones		
20528	001	Shopping Mall	Smith	12/17/2010			Tasks	Team	Milestones		

Project Fields:

- Project Type (you can add / remove project types from admin options --> Project Types)
- Client
- Project Billing Type (Per hour / fixed bid etc). You can add / remove new billing type from admin options --> billing types.)
- Project Code (short project code)
- Project Name
- Project Description
- Start Date
- Deadline
- Project "Team Lead"
- Project "Project Manager"
- Timesheet Approval Path (Approval path of timesheet and expense entries)
- Expense Approval Path (Approval path of expense entry)
- Default billing rate / per hour of employees
- Project billing rate type (Four types of billing rate options)
    1. (Use employee own billing rate) Billing rate should be picked from employee own billing rate
    2. (Use project roles billing rate) Billing rate should be picked from role wise billing rate of that project.
    3. (Use project based employee billing rate) Billing rate should be picked from project based employee's billing rate)
    4. (Use task based employee billing rate) Billing rate should be picked from billing rate defined for every separate task)

Adding new Project:

One of the first actions that should be performed on any new installation of Krooe is the creation of the various projects that your organization will be using for time, expense and task management.

To add new project, follow these instructions.

1. Enter project information in client project form.
2. Click on [Add] to add this project.

Deleting Project:

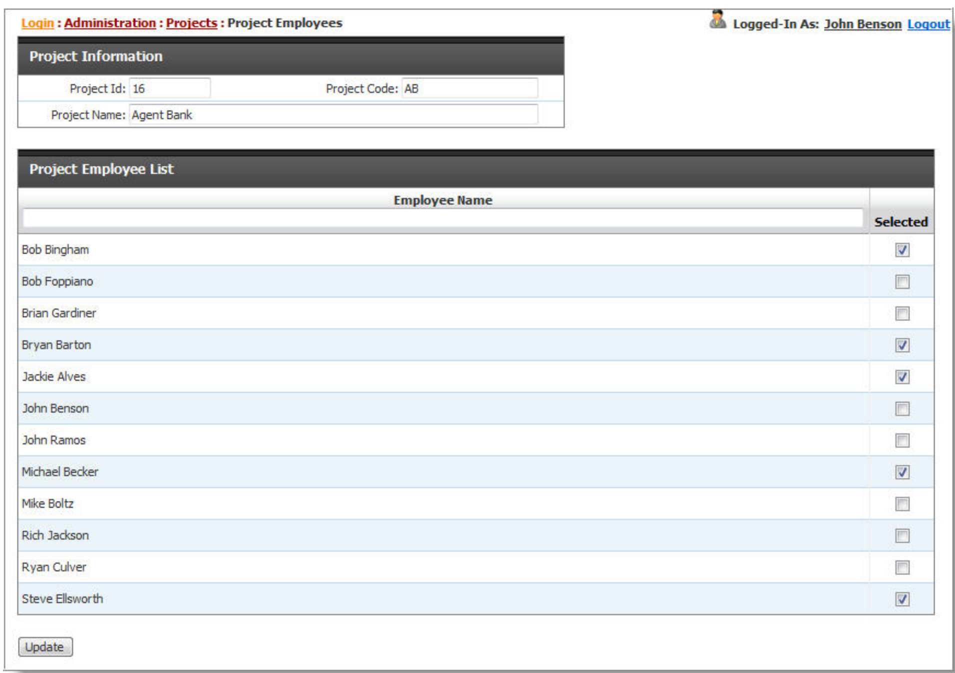
1. In [Project List], click on [Delete] link of record which you want to delete.
2. Click on "Yes" on delete confirmation dialog

Editing Project:

1. In [Project List], click on [Edit] link of record which you want to modify.
2. Update your required modification in [Client Information] form.
3. Click on [Update] button to update this record.

Editing Project Team

- On project add, Krooe automatically redirect to project team page where administrator can select employees which he wants to be in this particular project team.
- To edit project team, click on edit project link of project whose team you want to modify and then click on "Project Employees" button to open project team page



Task Setup

Projects can contain many tasks and up to ten hierarchical levels. Every employee who is assigned to a project can create task of that particular project. Administrator can customize task add permission using [Role Permission] option available in admin options.

More about task:

1. Task is the main source of project time sheet. Time entry can only be entered for a task of any project. [Administrator] should create projects and define project manager and team lead of projects.
2. [Administrator] or [Project Manager] or [Team Lead] can then define "Project Team".
3. [Project Manager] and [Team Lead] then can create project tasks and assign them to project team in order to allow employees to enter time entry for that task.
4. Only user who is part of project team can add new task in a project.
5. A task can be created using [All Employee Task] checked. All employee tasks appear in time entry of all team members of project.
6. A task can be created using [All Project Task] checked. All project task appear in time entry of all projects.
7. A task can be created using both [All Employee Task] and [All Project Task] checked. Those task then will be appeared for all projects and in all employees time entry.
8. Every task has their own status, priority, completed %, completed fields to monitor task progress for team collaboration purpose.
9. Every task has two fields Estimated Cost and Estimated Time spent for budgeting purpose.
10. Project manager can categorize their project tasks in different milestones (phases) for easier monitoring of individual milestones (phases) and then at project at root level.

Task Fields:

Tasks are divided into three sections

1. Task Information
    - Project
    - Parent task (parent task if you want add this task under a parent task)
    - Milestone
    - Task Name
    - Task Description
    - Task Type (category of task. It depends upon usage to usage of Krooe in different environments. Administrator can create new task types as per their organization needs from Admin options --> task types).
    - Duration
    - Completed %
    - Deadline
    - Task Status
    - Priority

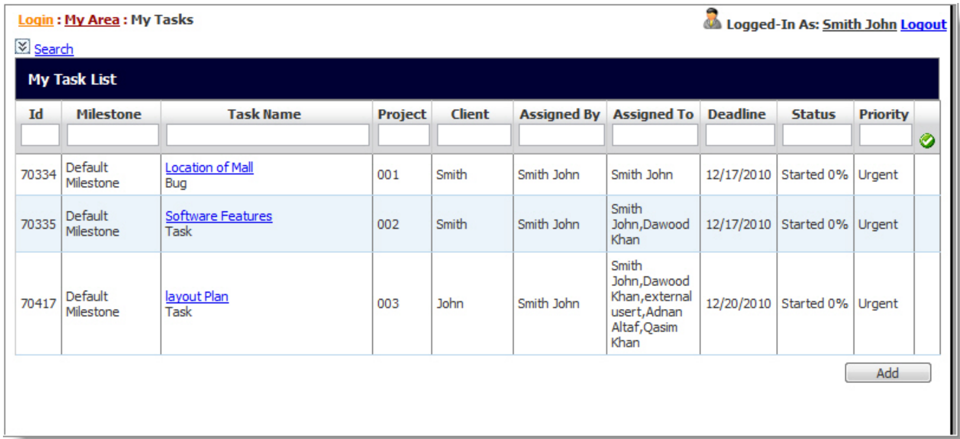
- All Employee task (Check this field, if you want this task to be appeared in time entry of all employee. General routine tasks for which you don't want to add in all projects.)
- All Project Task (Check this field, if you want this task to be appeared in time entry of all projects. General routine tasks for which you don't want to add in all project).
- Parent task (check this field, if you want this field to be add as parent field. This field will then come in parent task dropdown during task add)

2. Assign To
    - Select employees which you want to be assigned in this task. Employee assigned in task will only enter time entry of a task. Assign to is not require if a task is defined as [All Employee Task].
3. Estimates
    - Estimated Cost
    - Estimated Time spent

List of Task (two options)

Task can be viewed these four different option.

1. My Task (Only task which are assigned to logged in employee)


Login : My Area : My Tasks

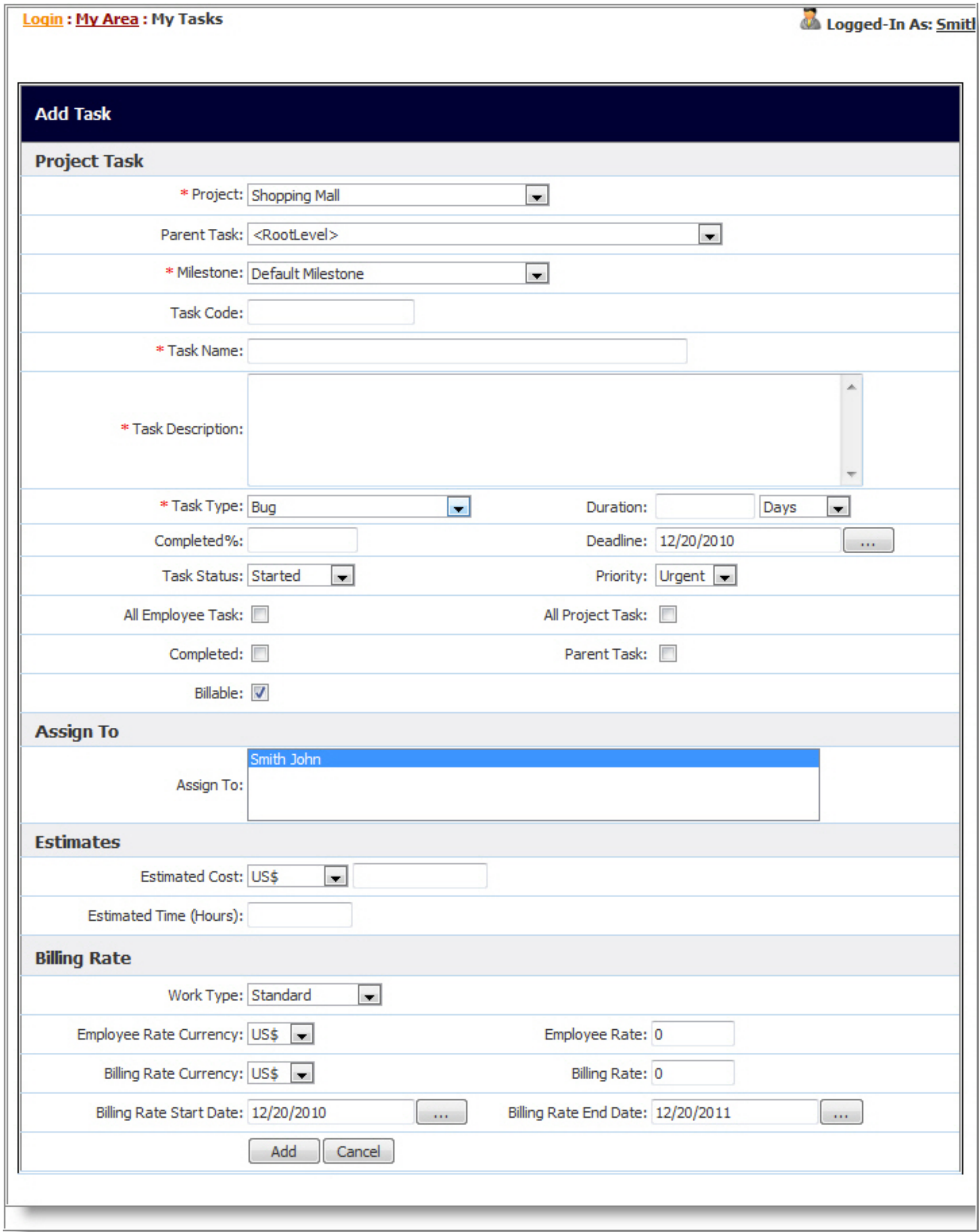
Logged-In As: Smith John Logout

Search

My Task List

Id	Milestone	Task Name	Project	Client	Assigned By	Assigned To	Deadline	Status	Priority	
70334	Default Milestone	Location of Mall Bug	001	Smith	Smith John	Smith John	12/17/2010	Started 0%	Urgent	
70335	Default Milestone	Software Features Task	002	Smith	Smith John	Smith John,Dawood Khan	12/17/2010	Started 0%	Urgent	
70417	Default Milestone	layout Plan Task	003	John	Smith John	Smith John,Dawood Khan,external usert,Adnan Altaf,Qasim Khan	12/20/2010	Started 0%	Urgent	

Add



2. My Area (Task that are either assigned to logged in employee or task which are reported by logged in employee)

1. My Projects --> Tasks (Hierarchical view of all task for administration purpose)

Adding New task [Standard Employee]

Logged-in employee can add new task in Krooe and can assign this task to any other employee. To add task:

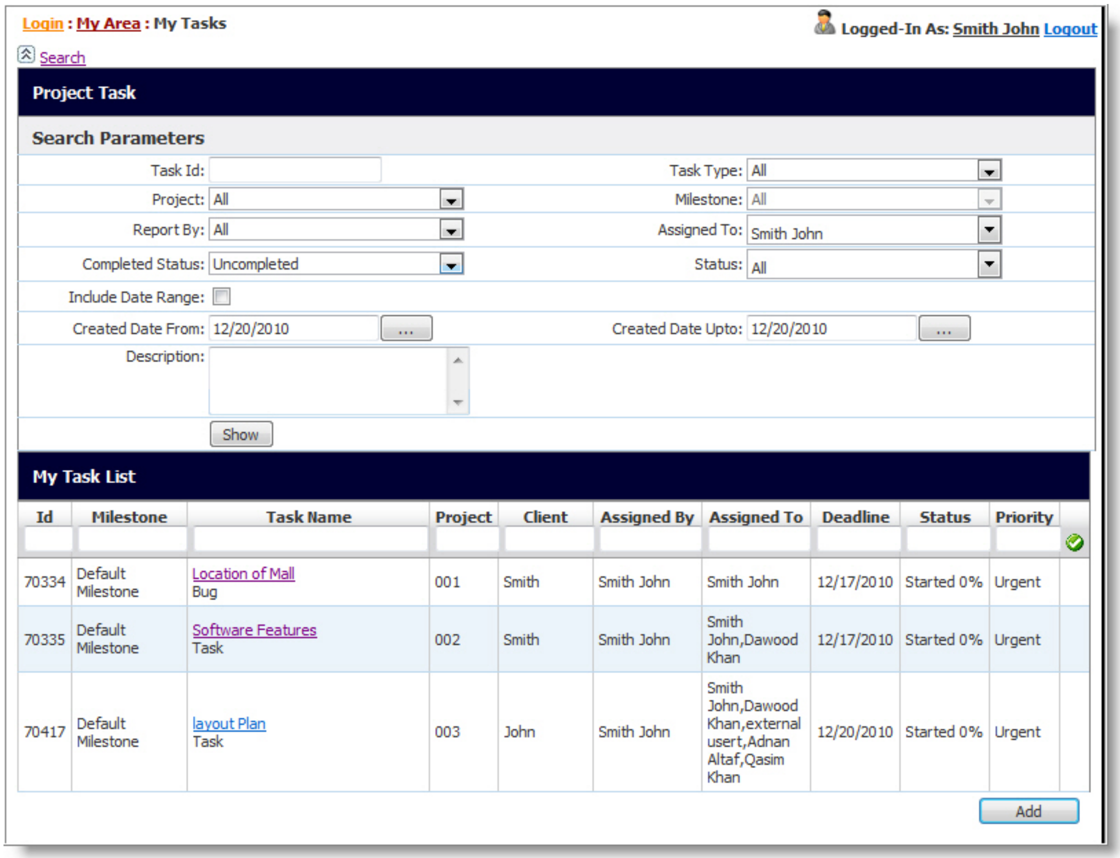
- Click on [My Task].
- Fill all task information in [Task information Form].
- Click on add to add this task.
- Task will be then appear in [My task] of employee who is assigned to any task.
- Employee can see their own reported task from [My Area]

My Tasks

About My Tasks

[My Tasks] page provides list of all tasks assigned to logged in user. User can then change it search critera to see other tasks also assigned to other employees. User can also add new task for assigned project and he can assign those task to my self as well as other team members of project.

- By default, [My Tasks] page only show uncompleted tasks which are assigned to currently logged in user.
- User can do search on other tasks also from here by clicking on [Search] link.
- In [Search] parameters, user can enter search parameters and can see other tasks also other then assigned to current user
- Clicking will launch [Task information] page where user can modify different task status, title, body.
- In task information page, user can also add "Task comments" for this task.
- In task information page, user can also attach different relevant documents which they want to share between project team for this task.
- User can also add new task by filling [Add Task] form on [My Tasks] page.

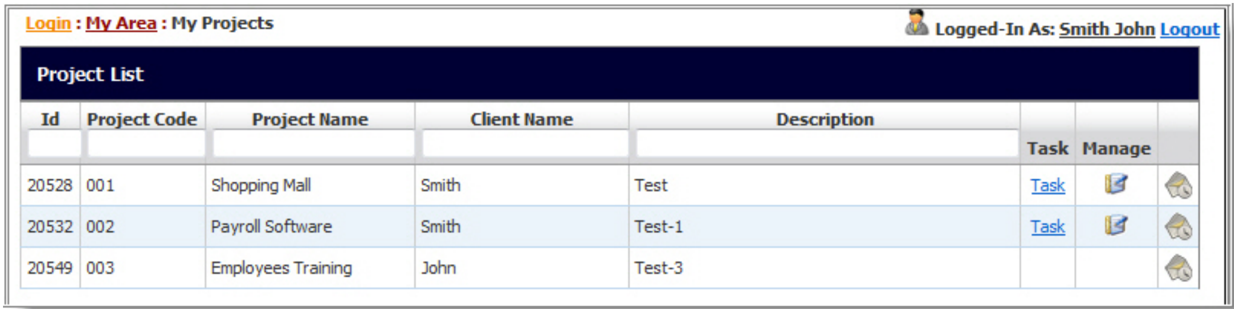


My Projects

About [My Projects]

[My Projects] page show all projects in which current logged in user is assigned.

- [My Projects] page will show only those projects in which he is assigned using [Project Team] option in Project.
- User can change his own email preferences by clicking on [Preferences] icon.
- User can open [Tasks] page by clicking on task link. Tasks link will only be available available for projects in which current employee is either Team Lead or Project Manager.
- User can click on [Manage] icon to open [Edit Project] page. [Manage] icon will only be available for those projects in which current user is either Project Manager or Team Lead.



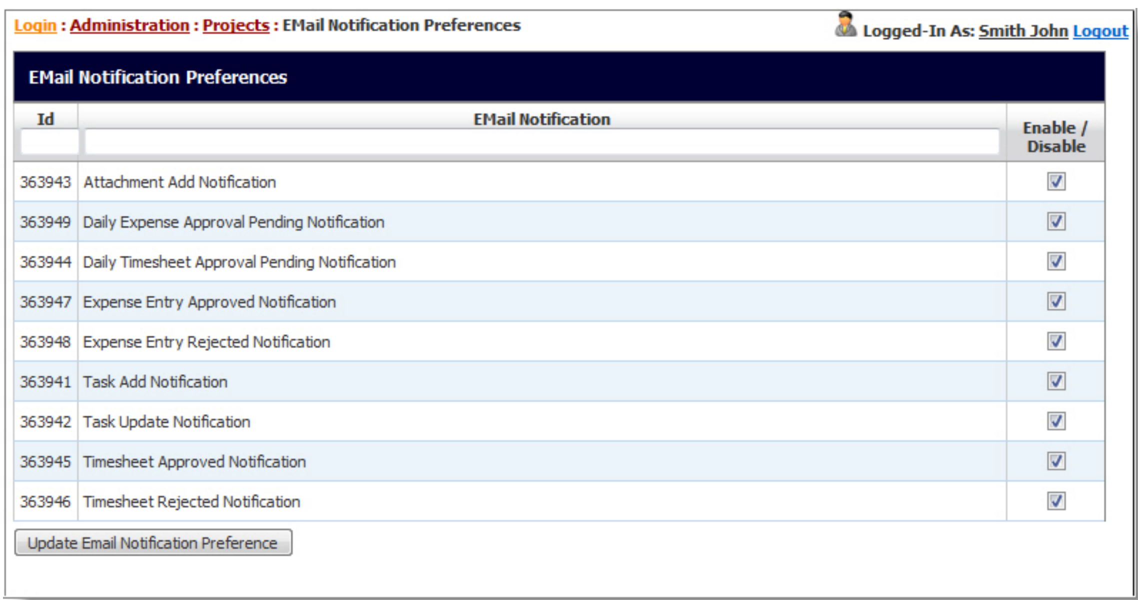
Login : My Area : My Projects   Logged-In As: Smith John Logout

Project List

Id	Project Code	Project Name	Client Name	Description	Task	Manage	
20528	001	Shopping Mall	Smith	Test	Task		
20532	002	Payroll Software	Smith	Test-1	Task		
20549	003	Employees Training	John	Test-3			

Project Preferences :

Through project preferences page, user can configure different project based email preferences.



Login : Administration : Projects : EMail Notification Preferences   Logged-In As: Smith John Logout

EMail Notification Preferences

Id	EMail Notification	Enable / Disable
363943	Attachment Add Notification	☑
363949	Daily Expense Approval Pending Notification	☑
363944	Daily Timesheet Approval Pending Notification	☑
363947	Expense Entry Approved Notification	☑
363948	Expense Entry Rejected Notification	☑
363941	Task Add Notification	☑
363942	Task Update Notification	☑
363945	Timesheet Approved Notification	☑
363946	Timesheet Rejected Notification	☑

Update Email Notification Preference