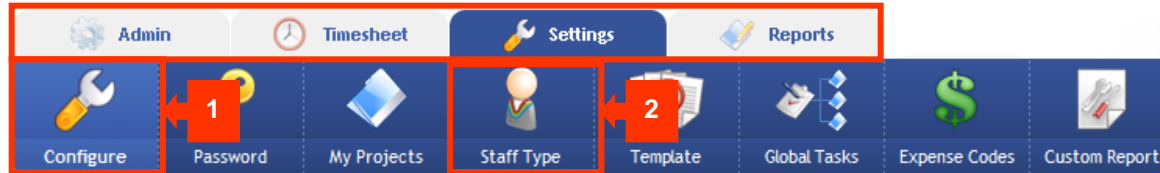# Quick Guide to Getting Started

*i-Timesheets*

Before your Staff can start using your i-Timesheets system, you (as the Administrator) need to complete the following simple steps. Log on to your i-Timesheets system with the initial Admin Logon that has been provided.

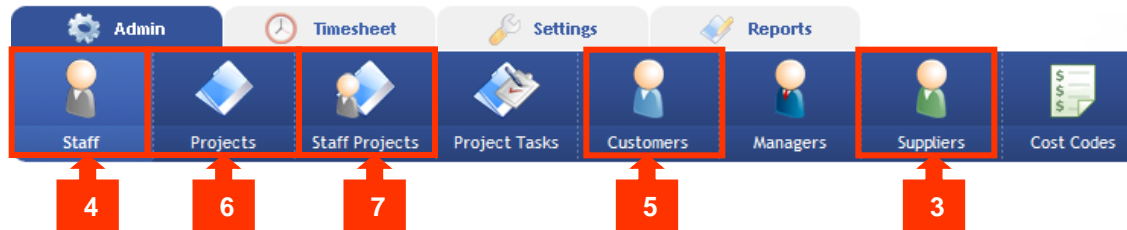## *Click on any of the four tabs to navigate your way around i-Timesheets*

Admin | Timesheet | **Settings** | Reports

Configure **[1]** | Password | My Projects | Staff Type **[2]** | Template | Global Tasks | Expense Codes | Custom Report

### Step 1: Configure the Settings

Review **configuration options** in all categories as shown on the screen. Alternatively, keep the default settings (which is suitable for most organisations).

### Step 2: Define Staff Types - Admin, Contractor, Salary …

Review the default **Staff Type listings** and add new types if necessary.

**Admin** | Timesheet | Settings | Reports

Staff **[4]** | Projects **[6]** | Staff Projects **[7]** | Project Tasks | Customers **[5]** | Managers | Suppliers **[3]** | Cost Codes

### Step 3: Add Suppliers ie. Contractor type staff

If you have any Contractor-type Staff then you should add your **Suppliers** next.

### Step 4: Add Staff

Add your **Staff.** *HINT - Make use of **Global Projects** and/or copy features to save time when setting up your Staff and Projects.*

### Step 5: Add Customers
Add your **Customers**.

### Step 6: Add Projects
Add your **Projects**.

### Step 7: Allocate your Staff to Projects

Allocate staff to your **Projects**. *HINT - If you have used the Global Projects function when setting up your Staff and Project records, then this function would have already allocated Staff to your Global Projects.*

### Basic Setup is Now Complete!

You can now inform your Staff that they can start using the system. If you have entered email addresses for all your Staff, then you can use the Email notification facility in i-Timesheets to send out a **customised welcome message**.

**Additional set up steps may be required depending on what features you've activated.  These are shown overleaf.**

# Additional Setup Steps

i-Timesheets

These steps can be undertaken in any order.
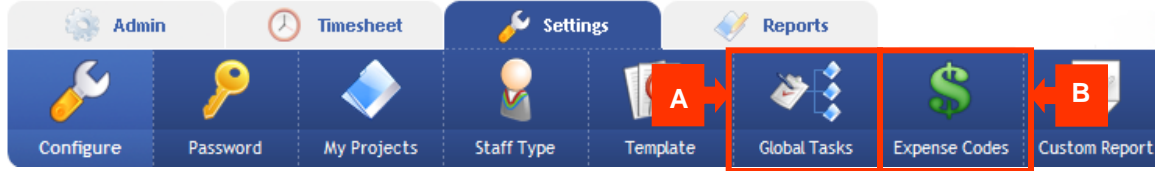


## A. Add Global Tasks

If you chose to use "global" Tasks in the "Time Entry Text Option" when configuring i-Timesheets, then you can add your **Global Tasks** now.

## B. Add Expense Codes

If you turned on "Track Expenses" and if you wish to categorise/code your expenses, then you can add your **Expense Codes** now. Review the **Expense Tracking** Setup guide to find out more.
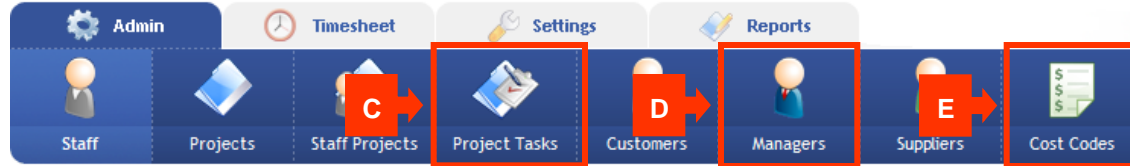


## C. Add Project-specific Tasks

If you turned on "Use Project-Specific Tasks" when configuring i-Timesheets, then you can add your **Project-Specific Tasks** now. Review the **Project Tasks Setup** guide to find out more.

## D. Add Managers

If you turned on "Use Authorisation" when configuring i-Timesheets, then you can add your **Managers** now. *Note: once you have defined your Managers you should assign them to the **Projects** they are responsible for.*

## E. Add Cost Codes

If you turned on "Apply Cost Tracking to Staff Projects" when configuring i-Timesheets, then you can add your Cost Codes now *Note: once you have defined your Cost Codes you should apply them to the Projects your **Staff work on**.*
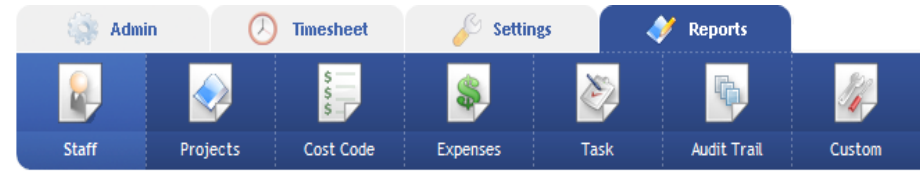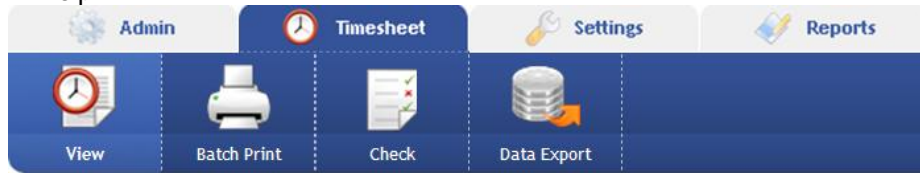
**Hints & Tips**

*If you have a significant volume of data to set up in the system, such as 50, 100 or even 200 or more staff, projects or customers, then it may be more economical to have your staff imported directly into the system for you by a i-Timesheets consultant. The data to be imported should be provided to i-Timesheets in a CSV or TAB delimited format. Note: There is usually a charge for this service.*

*Check out the **i-Timesheets Logon Anywhere Feature** if you would like flexibility in how you log on to your i-Timesheets system. This allows you to log on to i-Timesheets directly from your existing web site or Intranet.*

# Further Information for Administrators

**i-Timesheets**

Now that you've got your i-Timesheets system up and running what should you do next? You will be using the following key areas of i-Timesheets on a regular basis to help ensure that your timesheet system is running efficiently with as little effort as possible.  Follow the links to take you to our online help.

| Admin | Timesheet | Settings | Reports |
|---|---|---|---|
| View | Batch Print | Check | Data Export |

| Admin | Timesheet | Settings | Reports |
|---|---|---|---|
| Staff | Projects | Cost Code | Expenses | Task | Audit Trail | Custom |

### Monitoring your i-Timesheets system

Use the **Check Timesheets** screen to keep an eye on who has entered and completed their timesheets and more importantly, you can also send reminder emails to Staff who have not.

On the **View Timesheet** screen you can select any of your Staff members and enter or make adjustments to their time entries.

### Retrieving information from the system: Batch Print

Use the **Timesheets Batch Print** facility to print out timesheets for your Staff to send out with your invoices. Timesheets can be printed for Staff on a project-by-project basis (ideal for invoicing) or on a consolidated Staff timesheet. You can also control the information that is displayed on the timesheet by choosing between the various Print templates. *Note: The View Timesheet screen can only print a timesheet for a single Project and a single Staff member at a time.*

### Retrieving information from the system: Exports

Depending on your requirements you may find the **Data Export** useful if you need to export your timesheet  or expenses information to another system or to analyse the data in a spreadsheet program such as MS Excel.

### i-Timesheets Drill Down Data Viewer

Use the **Drill Down Data Viewer** found on many of the screens and reports within i-Timesheets for a quick check of the underlying data records behind any of the figures you see.

### i-Timesheets Reports

Review the numerous reports available in the i-Timesheets system to determine which ones best match your requirements.

- Staff Reports
- Project Reports
- Cost Code Reports
- Task Reports
- Audit Trail Report

Note : If you have a very specific reporting requirement that is not covered by the standard i-Timesheets Reports, then you can contact the i-Timesheets Support to have a custom report developed for your business.

### Giving non-Admin Staff Access to Certain Administrator Functions

If you wish to release some of the i-Timesheets reports and or i-Timesheets Admin screens to non-Admin users then you can do so on the **Custom Reports Setup** screen. This allows you to setup a pseudo "third" level of access to the i-Timesheets system by giving certain users access to Administrator features of your choosing.

### i-Timesheets Compact Interface

This Compact Interface makes i-Timesheets accessible to users of mobile PDA devices. It has a neat and reduced entry interface with all the core time entry functionality on the desktop. It operates on a Weekly timesheet view, with time entered on a daily basis and in worked hours format. *Note: There is no facility for submitting a timesheet via the Compact Interface. You will still need to log in to i-Timesheets to submit a timesheet.*