Quick Start Guide

Dovico Timesheet Hosted

1. What is Dovico Timesheet?

In today's highly competitive marketplace, you need **every advantage** to manage your employee time. Dovico Timesheet software eliminates the time wasted, and inaccuracies of, manually recording data. It enables you to keep track of all work-related or billable time and makes it easy to prepare budgets for projects.

This valuable asset to on-the-job productivity is also easy to use. With the click of a mouse, this innovative product eliminates the labor and takes the guesswork out of time keeping.

In a typical multi-user installation, **everyone** uses timesheet entry tools (including mobile apps) on a daily basis for time and expense entry while **managers** or empowered employees use the administrative functions for project monitoring and reporting.

Managers, executives

MANAGE PROJECTS

- Setup projects and tasks quickly
- Approve time and expenses
- Create detailed or simple estimates
- Track project progress
- Build and schedule reports

Projects & Tasks ▶

◀ **Submit Time & Expenses**

Employees

TIMESHEETS & EXPENSES

- Easy time entry
- Easy expense entry
- View and print timesheets
- Improved productivity
- Apps available for mobile devices

Integration

- QuickBooks
- Mobile Apps
- Excel

Dovico Timesheet Components:

Dovico Timesheet includes two major categories of functions; administrative functions used by managers for setup, monitoring and reporting, and time and expense entry views used by everyone to enter time and expenses.

Dovico Timesheet includes other useful tools:

- **Dovico Apps** to extend the functionality of the core software (https://www.dovico.com/tools).

- **Job Scheduler** used to automate some reporting and notification functions.

- **Import/Export App** to import or export employees, projects, tasks, time entries, etc., (https://www.dovico.com/tools).

- QuickBooks® integration via our **QuickLink** app (from https://www.dovico.com/tools).

2. Free Trial

Starting with Dovico Timesheet

Online Free trial:

Simply click on the Login link provided in the e-mail received following your completion of the sign up form and then go to the next page of this guide to get on your way.

A personalized database is created when using the trial. This database is available anytime during your free evaluation.

Important things to note:

- Free technical support is available for your trial period.

- Before using, Dovico Timesheet should be flagged as a safe site for your popup blocker.

- Dovico Timesheet is delivered with a demo database to help you review and familiarize yourself with the software.

3. Administrative Functions

Dovico Timesheet's administrative functions are used to create the projects and tasks all employees track their time against, and to monitor and report on time, costs, progress, etc. for one or more projects.

Administrative functions are only available to those users with suitable software access rights and security levels as defined when each user is added to the software.

Login In

If evaluating Dovico Timesheet using our 14-Day Online trial, click on the Login link provided in the e-mail received following your completion of the sign up form.

Before using, Dovico Timesheet should be flagged as a safe site for your popup blocker.

Navigating Within Dovico Timesheet:

Dovico Timesheet offers access to all views and tools through the **Main Navigation Menu**

To access the time and expense entry views, click the **My Entries** option in the menu.

General Requirements

Before employees can begin tracking their time and expenses, these general requirements must be completed.

Employees

In Dovico Timesheet, anyone who enters time and expenses, or who manages, monitors or reports on project activities is considered an **Employee**.

The Employees list pane (Navigation Bar > Projects & Employees > Employees) is the location where employees using the software are listed and can be added or edited. For each employee, a profile stores their user id, password, security level, their hourly pay/billing out rates and many more useful details.

Tasks

Task Templates are activities or work efforts against which employees track their time. Tasks are mandatory components required for time tracking.

The Tasks list pane is the location where tasks are listed and can be added or edited. (Navigation Bar > Projects & Employees > Task Templates)

Projects

Projects are the combined endeavors undertaken to create a unique product, service or result. A project is a mandatory component required for time tracking. Project information can include details such as a project manager, project start/end dates and project status.

Projects are listed in the Projects view. From there you can add and edit a project and its properties. (Navigation Bar > Projects & Employees > Projects).

Assignments

Project Assignments are the unique links between projects, tasks, and employees that define how a project is organized for time entry. Assignments must be created before employees can begin tracking their time.

A project's Tasks section is where assignments are created and managed. Assignments made in this view appear in Dovico Timesheet's time entry view with each employee only seeing the specific projects and tasks that have been assigned to them.

These four steps (adding employees, tasks, projects, and creating project assignments) are the minimum steps required to be completed before employees can begin tracking time and expenses. The next page outline what is required for more targeted goals such as creating estimates/budgets, etc.

(Optional)

Currencies is an optional feature making currency selection options available to users so that expenses, employee wages, and other data affecting costs can be entered in any of the enabled currencies. This feature also permits costs to be viewed in any currency within the software. (Navigation Bar > Setup > Currencies)

Currencies

Specific Goals

Are projects on time and on budget?

When a project's settings include the 'Budgeted Hours' option, you can to establish detailed company and client cost budgets and for those tracking actual time and costs against estimates.

Project Budgets

The **Reports** view is used to display a wide variety of time and cost reports. For example; locate and run the **Project Time & Costs** report to view one of the many available reports. (Navigation Bar > Reporting > Reports)

Reports

Collect time for payroll purposes, review and approve employee timesheets and expenses?

The **Approval Workspace** area is used to review, approve or reject time and expenses submitted by employees. (Navigation Bar > Approvals > Time & Expenses)

Time & Expense Approvals

Workflow

The **Workflows** tab is used to establish which manager must approve an employee's timesheet and/or expense submissions before those submissions can be processed for project costs, billing, reports, etc. (Navigation Bar > Approvals > Workflow)

Leave/ Absences Rules

The **Leave/Absences** Rules view allows a manager to apply the policies that automatically calculate how much vacation, sick leave, and other leave that an employee accumulates.
(Navigation Bar > Setup > Leave Rules)

Reports

The **Reports** view is used to display a wide variety of time related reports. Locate and run the **Time entries by Employee** report to see actual hours worked for each employee by date, project, and task.
 (Navigation Bar > Reporting > Reports)

Track time and expenses to accurately bill clients?

Clients

Clients are companies, business units, or individuals for whom work is performed. Clients can be linked to specific projects if time or expenses associated with projects are billable.

Clients are added and edited from the Assignment tree in the Project Assignments tab. (Navigation Bar > Projects & Employees > Clients)

Approved Expenses

The **Approved Expenses** view is used to review or edit expense information. (Navigation Bar > Time & Expenses > Approved Expenses)

Reports

The **Reports** view is used to display a wide variety of costing and billing reports. The **Client Time and Costs** report provides a summary of actual hours worked, and the client and company costs.
(Navigation Bar > Reporting > Reports)

4. Time and Expense Entry

Only once projects and tasks have been created and assigned to employees (Section 3) are users able to start tracking time and expenses using Dovico Timesheet. Projects and tasks are used to identify what you are tracking. Projects and tasks are created and assigned by managers or empowered employees using the software's administrative functions and views.

This section introduces you to only the **very basic concepts** and commands required to track time. To fully benefit from all the features, please review the software's help system or the User's Guide.

Time and Expense entry views are available to all employees tracking their time and expenses. To quickly learn how to enter time, access Dovico's free On Demand Training Videos.

How Employees Enter Time and Expenses

Each employee is assigned a unique login ID and Password from the administrative tools. These should be communicated to each employee along with company/database name and the URL required to launch Dovico Timesheet.

To enter time against a task:

The time entry screen is accessed by clicking the My Entries > My Timesheet in the navigation bar at the top of the screen.

1. Check the **task assignments** you wish to track time against (from the assignment tree on the left).

2. Add these to the weekly grid by clicking the **Add to Timesheet** button.

3. In the timesheet grid, click in the **cell intersecting** the appropriate **task** and **day of the week**.

4. Enter the **number of hours** worked against that task.

5. Optionally enter **details** for the time entry using the lower part of the screen.

6. Enter time on other task assignments as required.

7. Click the **Submit** button once all entries have been made for the day, week or as chosen by your company policies.

To enter an expense:

The expense entry screen is accessed by clicking the My Entries > My Expenses in the navigation bar at the top of the screen.

1. Click the **New sheet** button on the toolbar to create the new sheet.

2. Enter a **Sheet name**.

3. Select a **project** for this sheet from the Project drop-down list.

4. Enter **information** in the applicable expense view columns.

5. Click in an empty row to save the entry and create a new row.

6. Click the **Submit** button once you have entered/verified each entry for the expense sheet.

◰ New Sheet	💲 Submit	🖳 🖵 🖨 🗋 📈 ❓					

Active Sheets (1)	Rejected Sheets (0)	Submitted/Approved (Owed: CAD $0.00)					

Active sheets:	Training						
* Sheet name:	Training		Reimbursable total:	CAD $353.63			
* Project:	ACME-Development		Sheet total:	CAD $515.55			

📎	* Date	Expense Category	Quantity	Amount	Converted Amount	Reimbursable	Billable	Description
...	8/27/2017	Administration		USD $121.00	CAD $161.92	No	Yes	
📎	9/8/2017	Meals		GBP £27.20	CAD $45.42	Yes	Yes	
...	9/8/2017	Transportation		EUR €22.00	CAD $31.80	Yes	Yes	Taxi
...	9/10/2017	Accomodations		EUR €10.00	CAD $14.46	Yes	Yes	2 nights
...	9/13/2017	[None]		EUR €123.38	CAD $178.35	Yes	Yes	
📎	9/13/2017	[None]		CAD $0.00	CAD $0.00	Yes	Yes	Personal Vehicle
📎	9/13/2017	Mileage (CAD $0.38 per mile)	220.00	CAD $83.60	CAD $83.60	Yes	Yes	

5. Contact Information

Sales Support

Please contact our helpful sales personnel who will gladly assist you with your order or discuss your corporate requirements:

By Telephone:
Sales - North American toll free number: 1-800-618-8463
Sales - Global toll free number: 00 800 4618 8463

Through the Internet:
https://www.dovico.com or by e-mail at sales@dovico.com

Technical Support

Through the Internet:
Online Support form: https://www.dovico.com/support
Support email: support@dovico.com

By Telephone:
Toll Free North America: 1-800-618-8463
Toll Free Global: 00 800 4618 8463
Direct: 1-506-855-4477
Fax: 1-506-384-0727

Manuals, Instruction Guides, and other information: https://www.dovico.com/resources