# **Biz Timesheet Manager**

User's manual

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### **Biz Timesheet Manager**

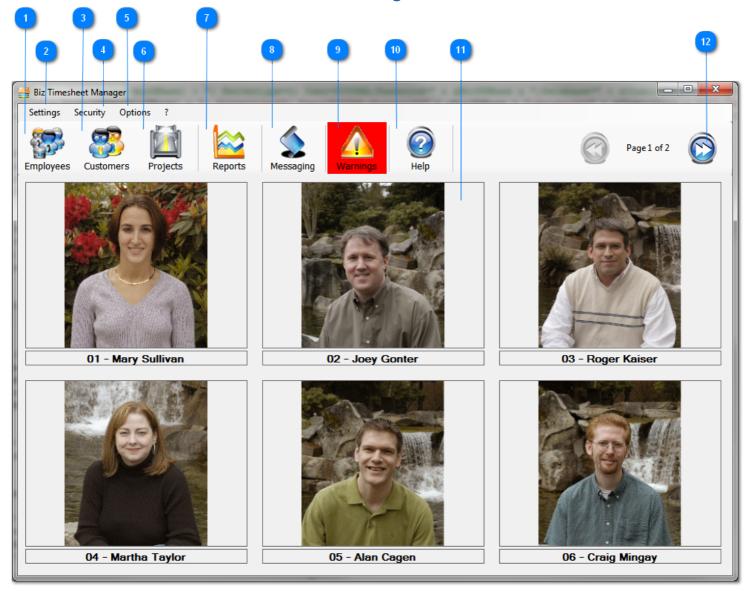
**Biz Timesheet Manager** is a time tracking software for enterprises. It allows employees to enter their time by themselves, easily and efficiently, no matter what their level of knowledge with computer is.

**Biz Timesheet Manager** will allow you to sea in real-time the time performed by your employees on all your projects, assignements, contracts, service calls, etc.

This software is provided for manufacturing companies, machine shops, production lines, as well as service companies such offices of lawyers, architects, accountants, etc.

All editions of **Biz Timesheet Manager** can be shared over a local network. This allows your employees to enter their time directly from their desktop.

### **Biz Timesheet Manager main window**



The welcome screen of Biz Timesheet Manager. It displays images of employees to quickly access their timesheets. To access the timesheet of an employee, simply click on his photo.

Note that it is possible to **reduce the image size** to allow the display of more employees on the same page. To do this, just right click the mouse button between the images. A menu will appear allowing you to change these parameters.





To access the employees management window.

2

Settings

Access to "Settings" menu

The "Settings" menu holds the following sub menus:

- 1. Employees This menu allows access to the employees management window
- 2. Customers This menu allows access to the customers management window
- 3. Professions This menu allows access to the professions management window
- 4. Departments This menu allows access to the departments management window
- 5. Working schedules This menu allows access to the working schedules management window
- 6. Project groups This menu allows access to the project groups management window
- 7. Projects This menu allows access to the projects management window





To access the <u>customers management window</u>

4

### Security

Access to "Security" menu

The "Security" menu holds the following sub menus:

- 1. <u>Security Options</u> This menu allows configuration of security options such as the administrator password and enabling or disabling the user management
- 2. Access Levels This menu allows access to the access levels management window
- 3. Users This menu allows access to the users management window
- 4. Lock Allows you to lock the software and thus force the next user to identify

5

### Options

Access to the "Options" menu

The "Options" menu contains the following elements:

- 1. Language Allows you to change the language of the software.
- 2. Parameters Allows access to the parameters window
- 3. Database connection settings Allows you to specify the server host name and the location of the database on it.
- 4. Messaging Allows access to the messaging features
- 5. Warnings Allows access to the warnings
- 6. Backup Database To make a backup of the database
- 7. Restoring database Shows how to restore a database file

6



To access the <u>projects management window</u>

7



To access the reporting window





To access the messaging window





To access the warnings window





Access to help files





To access the timesheet of an employee, click on his picture

Note that it is possible to **reduce the image size** to allow the display of more employees on the same page. To do this, just right click the mouse button between the images. A menu will appear allowing you to change these parameters.





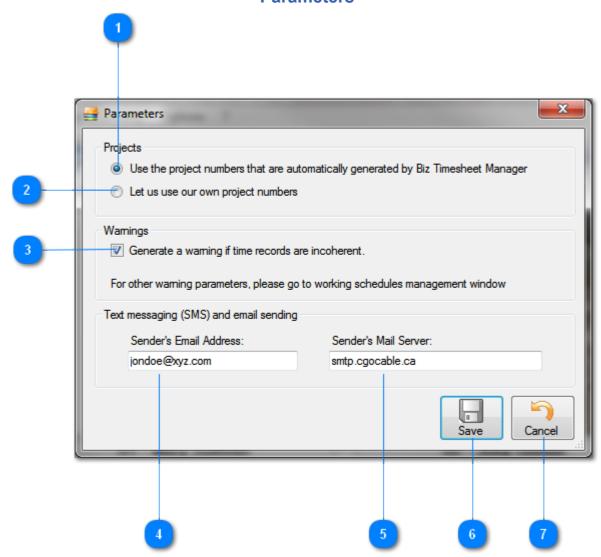
Page 1 of 2



Allows to navigate among the employees pages to show the desired one

Note that it is possible to **reduce the image size** to allow the display of more employees on the same page. To do this, just right click the mouse button between the images. A menu will appear allowing you to change these parameters.

### **Parameters**



### Setting of software parameters

- Use the project numbers that are automatically generated by Biz Timesheet Manager
  - If this option is selected, the project numbers generated by Biz Timesheet Manager will be used.
- Let us use our own project numbers
  - If this option is selected, the project numbers will be will be determined by you.
- ☑ Generate a warning if time records are incoherent.

If this option is selected, <u>warnings</u> will be generated if time records are incoherent in employee's time sheets.

4



### Sender's email address

This allows the sending of messages using email and SMS. View the <u>message</u> window for more details.



### **Outgoing Mail Server**

It allows sending messages using SMS and email. View the <u>message</u> window for more details.

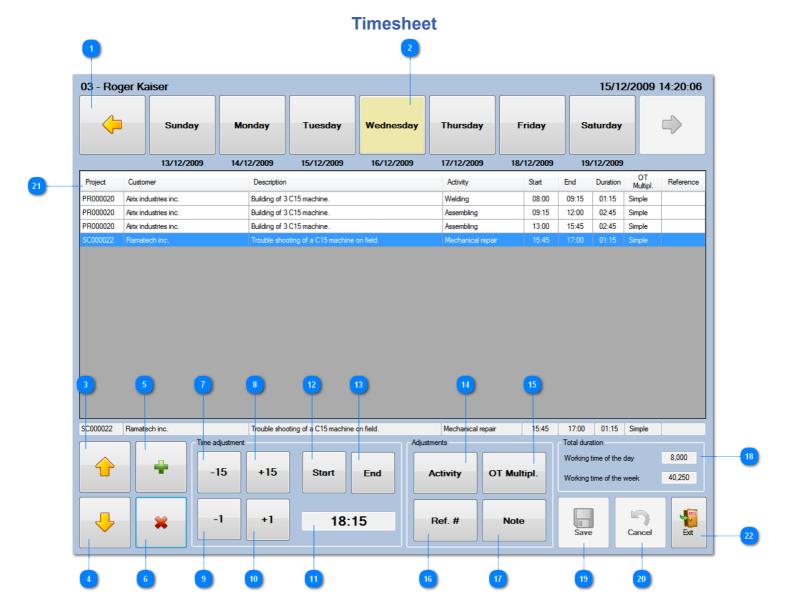


Save the current changes





Cancel the current changes



This is the timesheet that employees use to enter their time.

The grid displays the time of the current day. The current day is the one represented by the yellow button at the top of the grid.

You can switch from one day to another by simply clicking on the button representing the desired day. You can change week by using the buttons with arrows at the left and right sides.



This button allows navigation from one week to another and thus show the data of the day desired



The week days buttons allow you to select the day to display in the grid. The yellow button is the current day. To move from one week to another, use the <u>navigation buttons</u> at the left and right





Button "Up". This button skips to the upper record in the grid. You can also manually click on the grid to change the selection.





Button "Up". This button skips to the lower record in the grid. You can also manually click on the grid to change the selection.





Adds a time record in the grid using the project selection window.



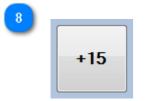


Allows to delete the selected time record.

7



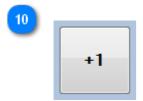
Removes 15 minutes to the current time selection



Add 15 minutes to the current time selection



Removes 1 minute to the <u>current time selection</u>



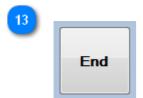
Add 1 minutes to the current time selection



Current time selection. This is the time that will go down in time record if you click "Start" or "End".



Clicking on "Start" will replace the start time of the current record with the <u>current time selection</u>.



Clicking on "End" will replace the end time of the current record with the <u>current time selection</u>.



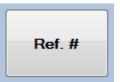
Allows you to change the activity of the current time record using the activities selection window.



OT Multipl.

Allows you to change the multiplier for overtime. You can include "Simple", "And a half" "Double" or "Triple". The time for the record will then be calculated according to this multiplier.





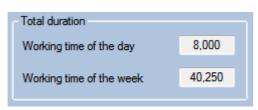
Allows you to change the reference number of the current time record using this window.





Allows you to change the note of the current time record using this window.





Displays the total time of the current day and week.





Save the current changes





Cancel the current changes

| Project  | Customer              | Description                                 | Activity          | Start | End   | Duration | OT<br>Multipl. | Referen |
|----------|-----------------------|---|-------------------|-------|-------|----------|----------------|---------|
| PR000020 | Airix industries inc. | Building of 3 C15 machine.                  | Welding           | 08:00 | 09:15 | 01:15    | Simple         |         |
| PR000020 | Airix industries inc. | Building of 3 C15 machine.                  | Assembling        | 09:15 | 12:00 | 02:45    | Simple         |         |
| PR000020 | Airix industries inc. | Building of 3 C15 machine.                  | Assembling        | 13:00 | 15:45 | 02:45    | Simple         |         |
| SC000022 | Ramatech inc.         | Trouble shooting of a C15 machine on field. | Mechanical repair | 15:45 | 17:00 |          | Simple         |         |
|          |                       |   |                   |       |       |          |                |         |

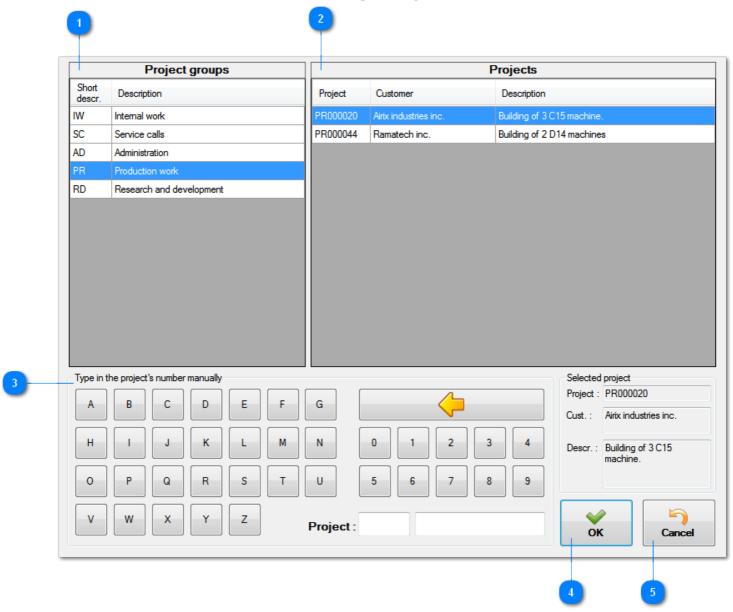
The list of time of the selected day. To change the day, use the <u>week days buttons</u>.





To close the timesheet

## Selecting a project

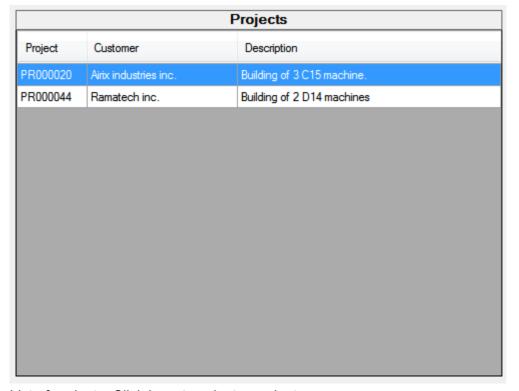


This window allows the selection of a project to add to the time sheet.



| Project groups |                          |  |  |
|----------------|--------------------------|--|--|
| Short descr.   | Description              |  |  |
| IW             | Internal work            |  |  |
| SC             | Service calls            |  |  |
| AD             | Administration           |  |  |
| PR             | Production work          |  |  |
| RD             | Research and development |  |  |
|                |                          |  |  |

List of <u>project groups</u>. Click on the project group to display the projects included in this group in the right list.



List of projects. Click here to select a project.



This area allows you to type the project number on screen (in the case of using a touch screen).





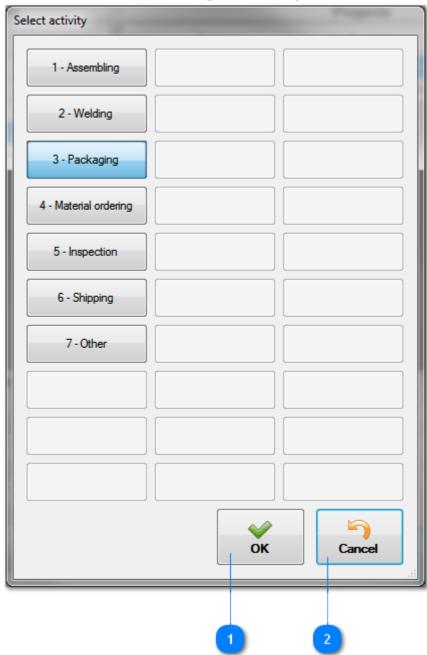
Validate the project selection





Cancel the project selection

## **Selecting an activity**



This window allows the selection of an activity for the current time record of the time sheet.

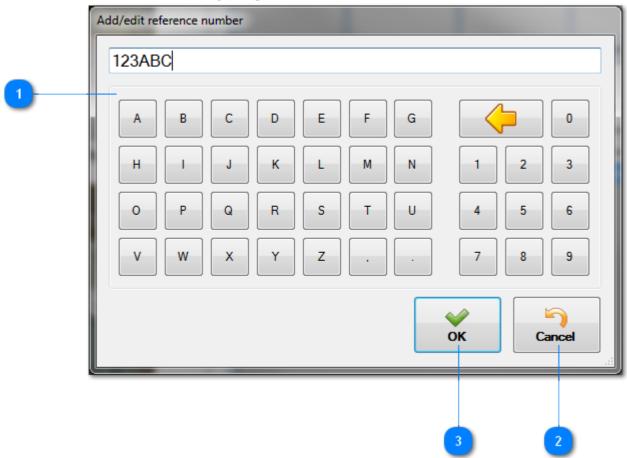


Validate the activity selection



Cancel the activity selection

## Typing a reference number



This window allows you to enter a reference number.



This area allows you to type the reference number on screen (in the case of using a touch screen).

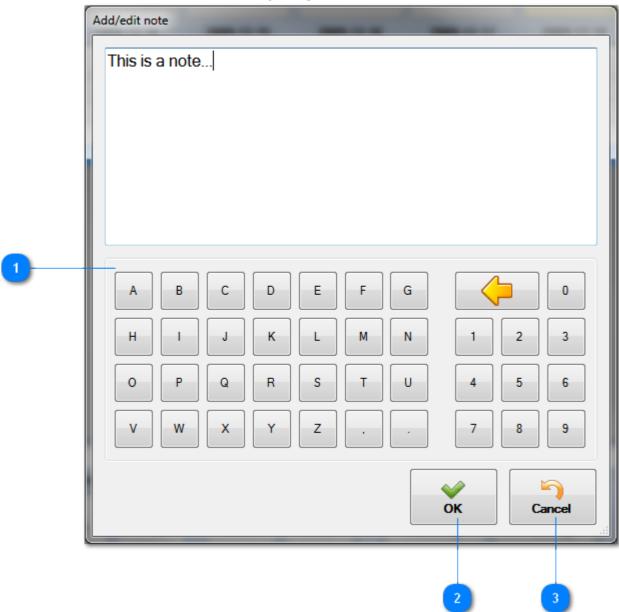


Cancel the reference number selection



Validate the reference number selection

Typing a note



This window allows you to enter a note



This area allows you to type the note on screen (in the case of using a touch screen).





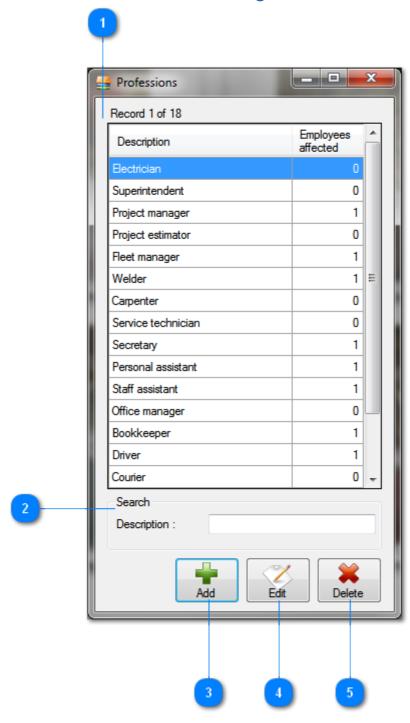
Validate the note selection

3

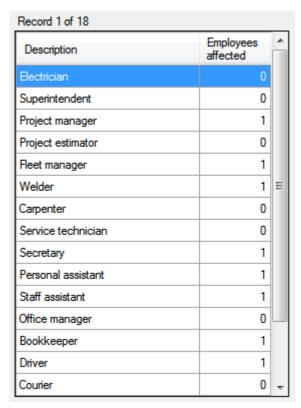


Cancel the note selection

## **Professions management**



This is the professions management window. The records are displayed according to the <u>search box</u> located below the list.



This is the list of professions. The records are displayed according to the <u>search box</u> located below the list.

To edit a record, you can double-click on it or use the "Edit" button to access the <u>Add/edit professions</u> window.





You can search for a record using the various settings available in this box. The wildcard character "\*" is allowed in research.





Adds a new profession using the Add/edit professions





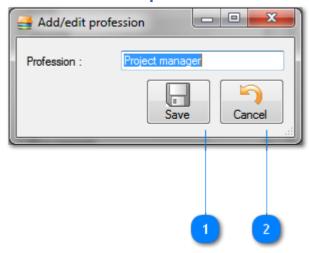
Edit the current profession using the Add/edit professions window





Allows you to delete selected records

## Add/edit professions



This window lets you modify or create a new profession. A profession can be assigned to each employee at its creation. See this section for details on creating employees.

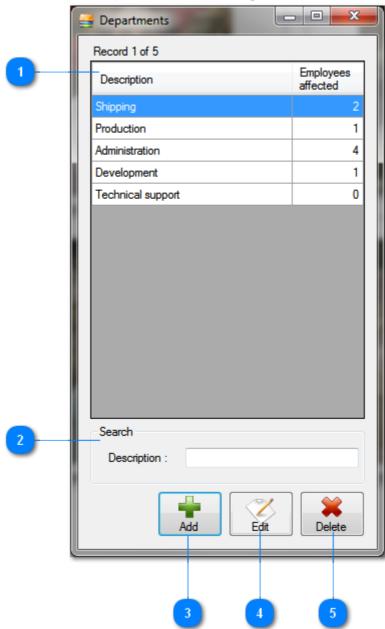


Save the current changes



Cancel the current changes

## **Departments management**



This is the departments management window. The records are displayed according to the <u>search box</u> located below the list.

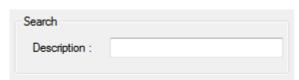


| Record 1 of 5     |                    |
|-------------------|--------------------|
| Description       | Employees affected |
| Shipping          | 2                  |
| Production        | 1                  |
| Administration    | 4                  |
| Development       | 1                  |
| Technical support | 0                  |
|                   |                    |

This is the list of departments. The records are displayed according to the <u>search box</u> located below the list.

To edit a record, you can double-click on it or use the "Edit" button to access the <u>Add/edit department</u> window.





You can search for a record using the various settings available in this box. The wildcard character "\*" is allowed in research.





Adds a new department using the Add/edit department window.





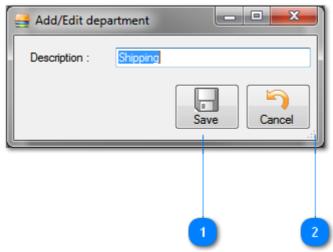
Edit the current department using the Add/edit department window





Allows you to delete selected records

## Add/edit department



This window lets you modify or create a new department. A department can be assigned to each employee at its creation. See this section for details on creating employees.

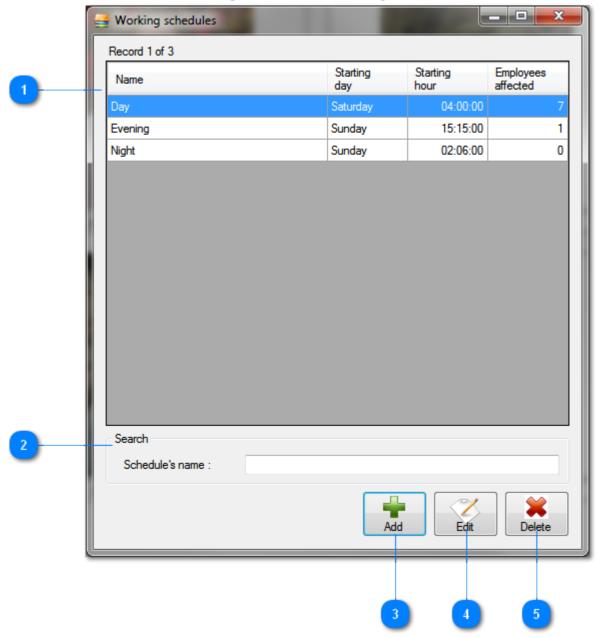


Save the current changes



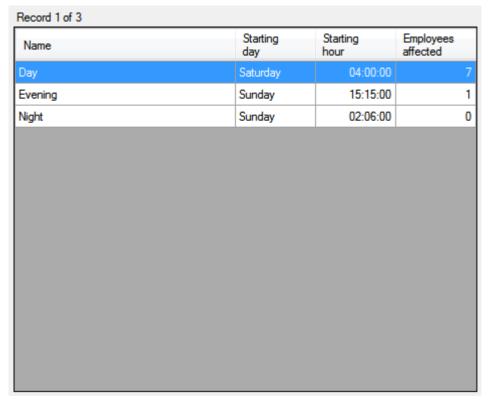
Cancel the current changes

## Working schedules management



This is the working schedules management window. The records are displayed according to the <u>search box</u> located below the list.

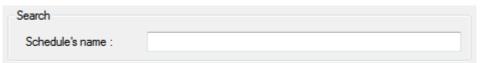




This is the list of working schedules. The records are displayed according to the <u>search box</u> located below the list.

To edit a record, you can double-click on it or use the "Edit" button to access the <u>Add/edit working</u> schedule window.





You can search for a record using the various settings available in this box. The wildcard character "\*" is allowed in research.





Adds a new working schedule using the Add/edit work schedules window.





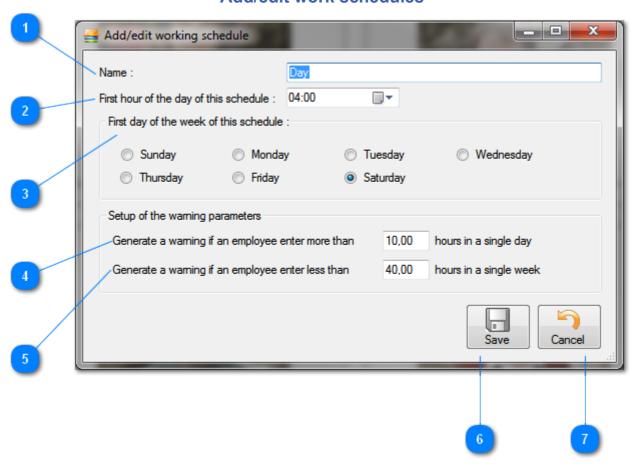
Edit the current workin schedule using the Add/edit work schedules window





Allows you to delete selected records

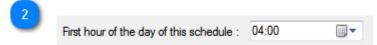
### Add/edit work schedules



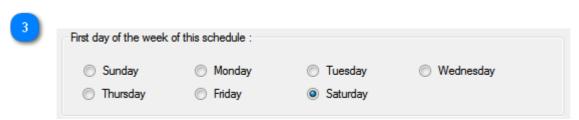
This window lets you modify or create a new working schedule. A working schedule must be assigned to each employee at its creation. See this section for details on creating employees.



The name of the working schedule. For example: Day, Evening, Night...



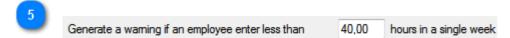
The start time of shift. If the start time of the shift is 3:00 AM, then the total time of the day will be calculated from recorded times between 3:00 AM and 2:59 AM the next day, and not between midnight and 11:59 PM.



First day of the week of this schedule. If the first day of the shift is Monday, for example, the total time of the week will be calculated as of Monday, at the first hour of the shift until the following Monday at the same time.



Generate a warning if an employee enter more than a certain number of hours in a day.



Generate a warning if an employee enter less than a certain number of hours in a week.

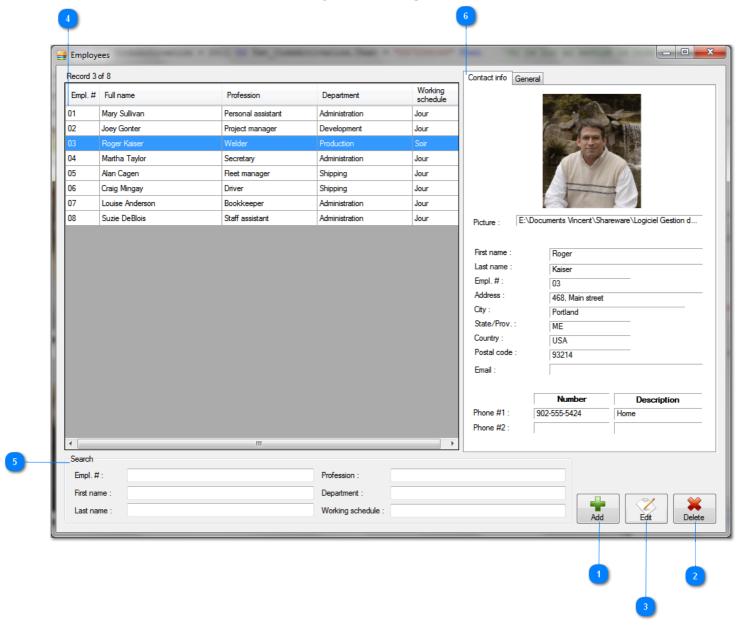


Save the current changes



Cancel the current changes

## **Employees management**



This is the employees management window. The records are displayed according to the <u>search box</u> located below the list.

Information regarding the selected employee is displayed to the right of the screen.



Adds a new employee using the Add/edit employees window.



Allows you to delete selected records

3



Edit the current employee using the Add/edit employees window

4

| Empl. # | Full name       | Profession         | Department     | Working schedule |
|---------|-----------------|--------------------|----------------|------------------|
| 01      | Mary Sullivan   | Personal assistant | Administration | Jour             |
| 02      | Joey Gonter     | Project manager    | Development    | Jour             |
| 03      | Roger Kaiser    | Welder             | Production     | Soir             |
| 04      | Martha Taylor   | Secretary          | Administration | Jour             |
| 05      | Alan Cagen      | Fleet manager      | Shipping       | Jour             |
| 06      | Craig Mingay    | Driver             | Shipping       | Jour             |
| 07      | Louise Anderson | Bookkeeper         | Administration | Jour             |
| 08      | Suzie DeBlois   | Staff assistant    | Administration | Jour             |

This is the list of employees. Those employees will appear in the main window. The records are displayed according to the <u>search box</u> located below the list.

To edit a record, you can double-click on it or use the "Edit" button.

5

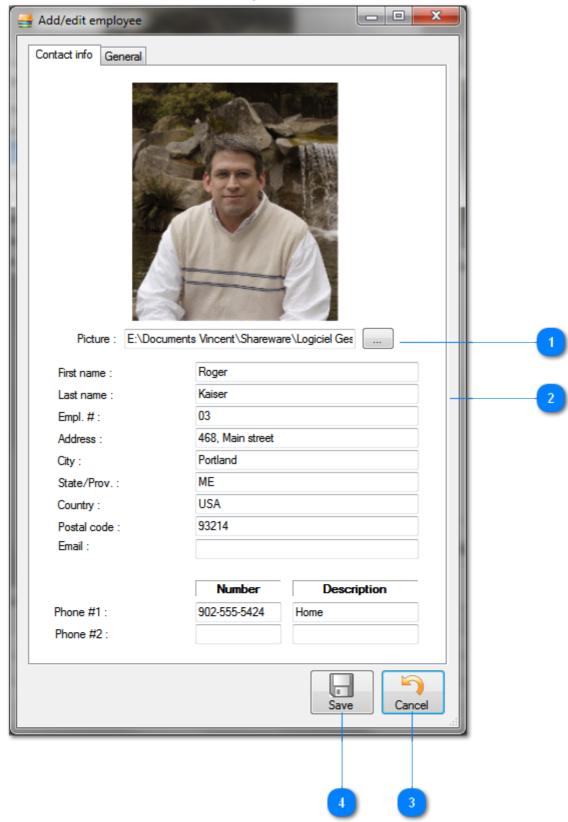
| Search       |                    |  |
|--------------|--------------------|--|
| Empl.#:      | Profession :       |  |
| First name : | Department :       |  |
| Last name :  | Working schedule : |  |

You can search for a record using the various settings available in this box. The wildcard character "\*" is allowed in research.



Show information about the selected employee.

# Add/edit employees - "Contact info" tab



This window lets you edit or create employees.

Picture : E:\Documents Vincent\Shareware\Logiciel Ges ...





Enter here the contact information of the employee.





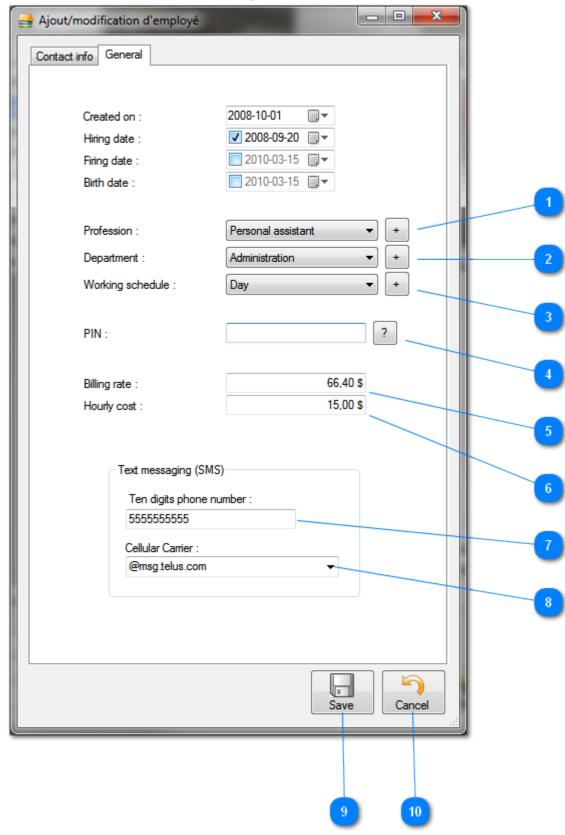
Cancel the current changes





Save the current changes

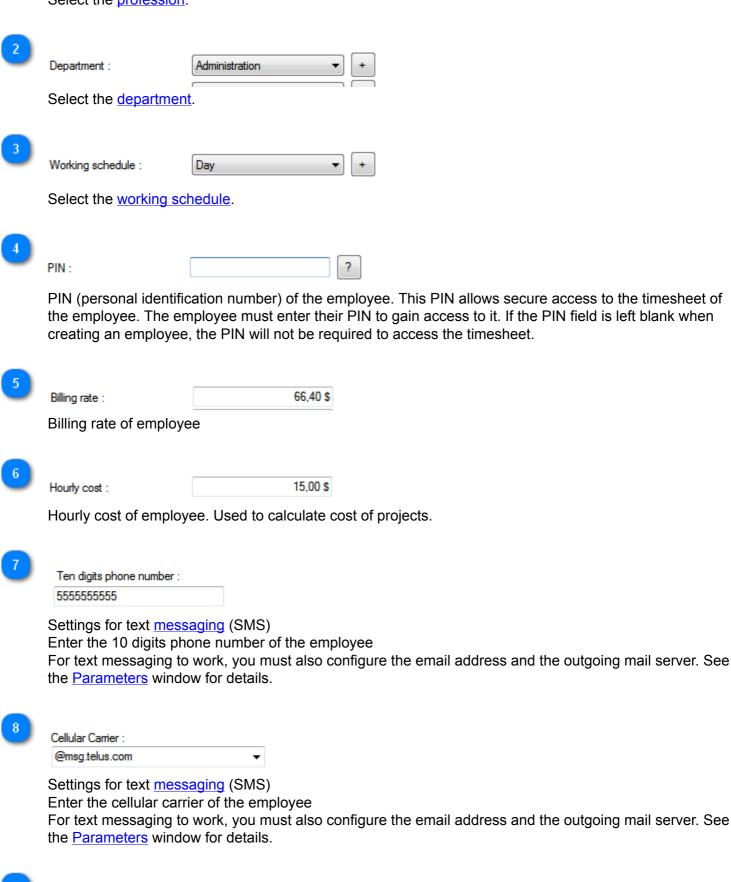
# Add/edit employees - "General info" tab



This window lets you edit or create employees.



Select the profession.



9

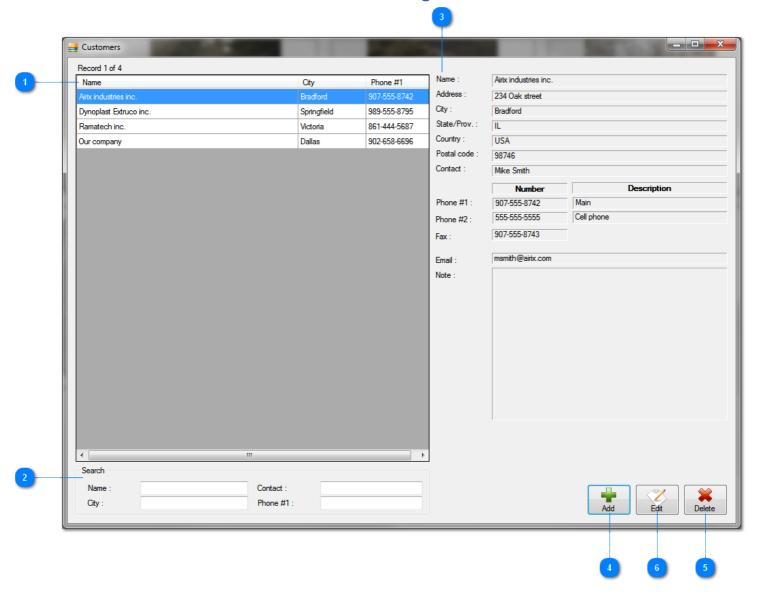


Save the current changes



Cancel the current changes

## **Customers management**



This is the customers management window. The records are displayed according to the <u>search box</u> located below the list.

Information regarding the selected customer is displayed to the right of the screen.

You must assign a client to each project you create. For non billable projects or administrative tasks, you can create your own company as a customer and use it to create such projects.



| Name                   | City        | Phone #1     |
|------------------------|-------------|--------------|
| Airix industries inc.  | Bradford    | 907-555-8742 |
| Dynoplast Extruco inc. | Springfield | 989-555-8795 |
| Ramatech inc.          | Victoria    | 861-444-5687 |
| Our company            | Dallas      | 902-658-6696 |

This is the list of customers. The records are displayed according to the <u>search box</u> located below the list.

To edit a record, you can double-click on it or use the "Edit" button to access the Add/edit working schedule window.

2

| Search |           |  |
|--------|-----------|--|
| Name : | Contact : |  |
| City:  | Phone #1: |  |

You can search for a record using the various settings available in this box. The wildcard character "\*" is allowed in research.

3

| Name :                   | Airix industries inc.         |                         |  |
|--------------------------|-------------------------------|-------------------------|--|
| Address :                | 234 Oak street                |                         |  |
| City:                    | Bradford                      |                         |  |
| State/Prov.:             | IL                            |                         |  |
| Country:                 | USA                           |                         |  |
| Postal code :            | 98746                         |                         |  |
| Contact :                | Mike Smith                    |                         |  |
|                          |                               |                         |  |
|                          | Number                        | Description             |  |
| Phone #1 :               | <b>Number</b><br>907-555-8742 | <b>Description</b> Main |  |
| Phone #1 :<br>Phone #2 : |                               |                         |  |
|                          | 907-555-8742                  | Main                    |  |
| Phone #2:                | 907-555-8742<br>555-555-5555  | Main                    |  |

Show information about the selected customer.

4



Adds a new customer using the Add/edit customers window.

5



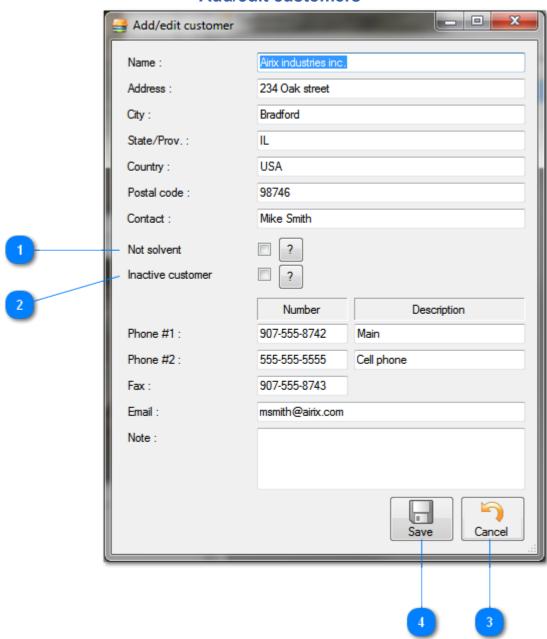
Allows you to delete selected records

6



Edit the current customer using the Add/edit customers window

#### Add/edit customers



This window lets you edit or create customers.



Not solvent. Indicates whether the customer is a deadbeat. When you create a project with this client, a warning will indicate that it is not solvent.



Inactive customer. An inactive customer cannot be used to create new projects. Customers no longer used, rather than being suppressed, are setted inactive because data from previous projects can always be related thereto.





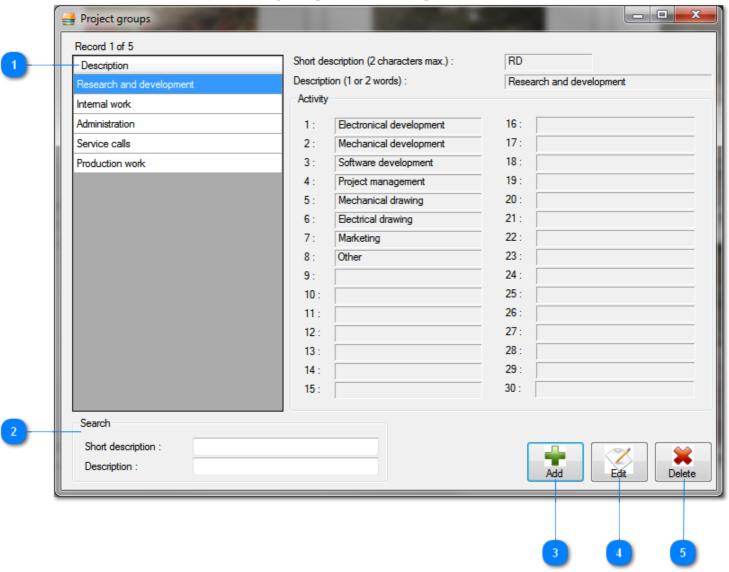
Cancel the current changes





Save the current changes

### **Project groups management**

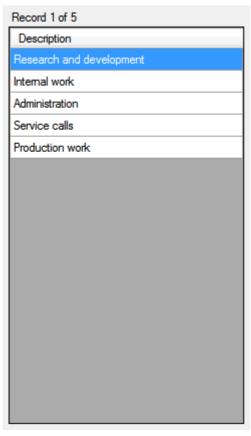


This is the project groups management window. The records are displayed according to the search box located below it.

Project groups are used for classifying the projects into categories to let your employees easily create their timesheets and for you to have clear reports. See this section for details on entering projects in the timesheet. You could, for example, create a project group "SC" for "Service Calls". The short description in this case would be "SC" and the description would be "Service Calls". When you will create a project in this group, the project number will begins with the letters "SC". Example: "SC000001".

You can create as many project groups you want.

You can configure up to 30 different activities for each project group. Activities could include, for example, "Carriage" "Design", "Drawings," "Project Management", "Collage," "Assembly", "Packaging", "Administration", etc. ... If you choose to set up activities for a project group, when employees will enter time in this project group, they will have to select which activity they performed. See this window for details about selecting an activity in the timesheet.



This is the list of project groups. The records are displayed according to the <u>search box</u> located below the list.

To edit a record, you can double-click on it or use the "Edit" button to access the <u>Add/edit working schedule</u> window.

2



You can search for a record using the various settings available in this box. The wildcard character "\*" is allowed in research.

3



Adds a new customer using the Add/edit project groups window.

4

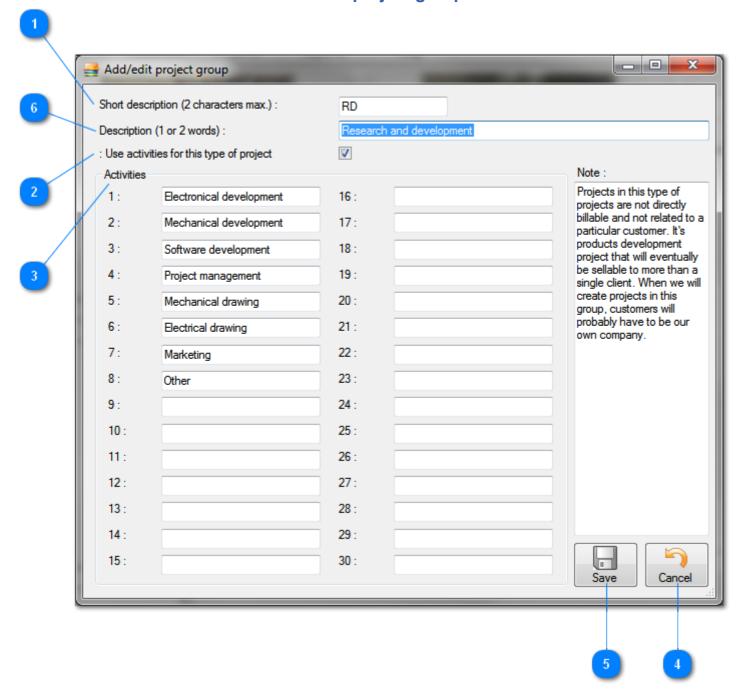


Edit the current project group using the Add/edit project groups window

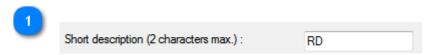


Allows you to delete selected records

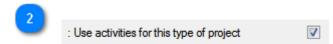
### Add/edit project groups



This window lets you edit or create project groups.

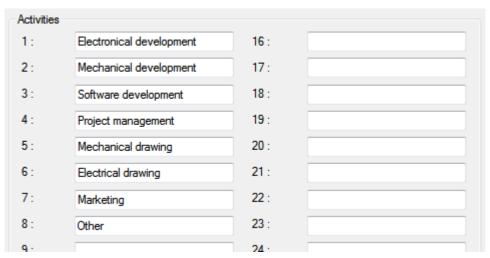


Entering the abbreviated description. It will appear at the beginning of the project number. Example: "RD000001"



Check this box if you wish to activate activities for this project group.

You can configure up to 30 different activities for each project group. Activities could include, for example, "Carriage" "Design", "Drawings," "Project Management", "Collage," "Assembly", "Packaging", "Administration", etc. ... If you choose to set up activities for a project group, when employees will enter time in this project group, they will have to select which activity they performed. See this window for details about selecting an activity in the timesheet.



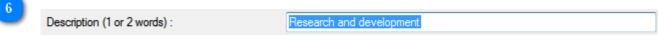
Enter here the activities of this project group. You can register up to 30 activities.



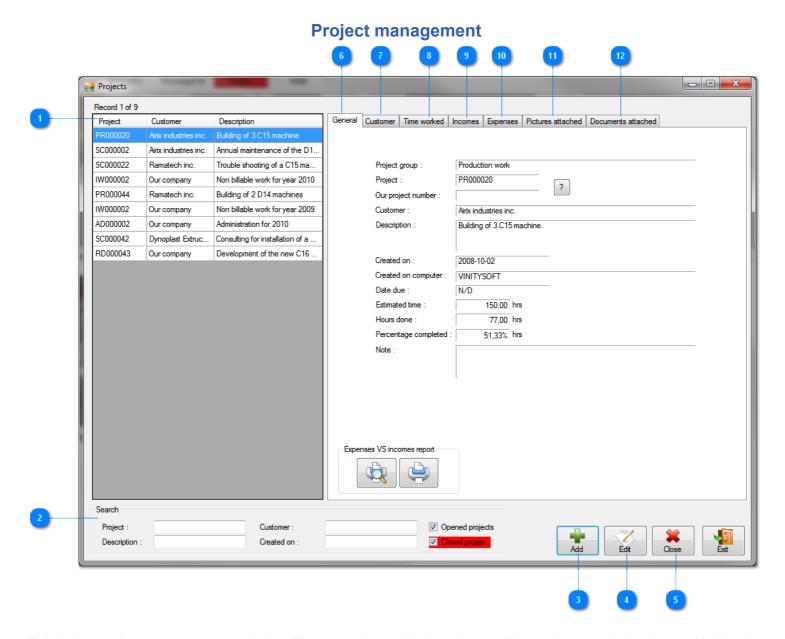
Cancel the current changes



Save the current changes

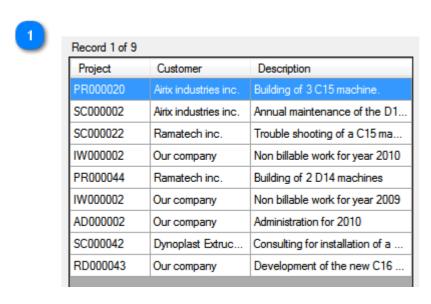


The description of the project group



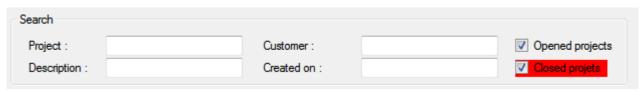
This is the project management window. The records are displayed according to the <u>search box</u> located below it.

When entering their timesheet, your employees will have to select a project using the <u>Selecting a project</u> window.



This is the list of projects. The records are displayed according to the search box located below the list. To edit a record, you can double-click on it or use the "Edit" button to access the <a href="Add/edit projects">Add/edit projects</a> window.

2



You can search for a record using the various settings available in this box. The wildcard character "\*" is allowed in research.

3



Adds a new project using the Add/edit project groups window.

4



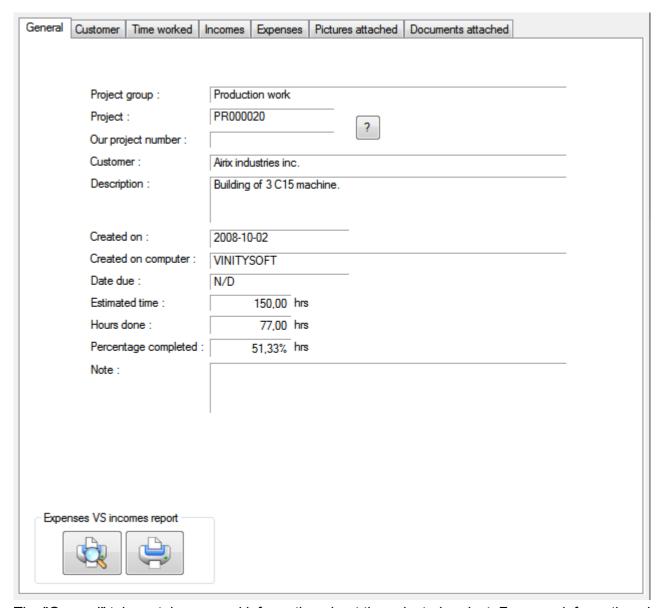
Edit the current project using the Add/edit projects window

5



Allows you to delete selected records

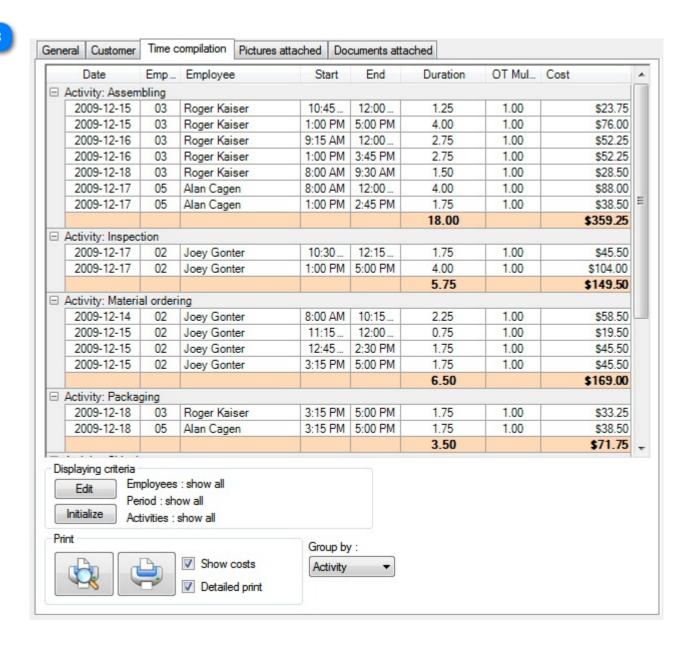
6



The "General" tab contains general information about the selected project. For more information about the data of this tab, see the <a href="Add/edit projects">Add/edit projects</a> window.

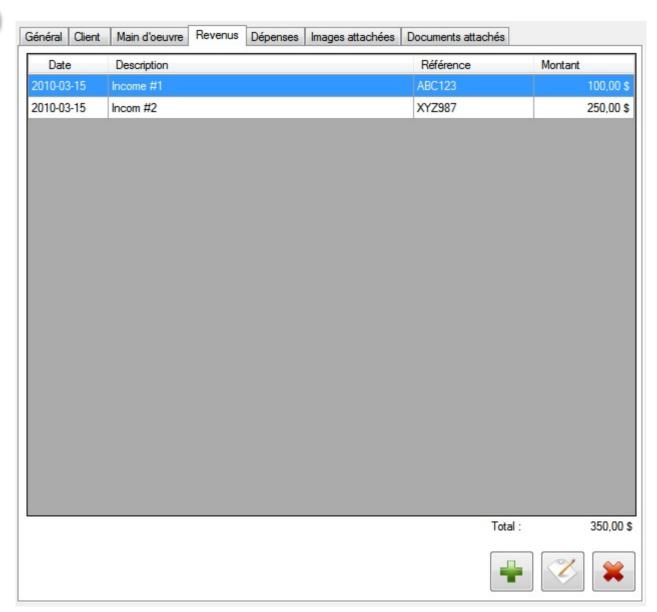
| ieneral | Customer | Time compilation | Pictures attached  | Documents attached |     |
|---------|----------|------------------|--------------------|--------------------|-----|
|         |          |                  |                    |                    |     |
|         | Name     | · Air            | ix industries inc. |                    |     |
|         | Ivaille  | .   [71          | ix industries inc. |                    |     |
|         | Addre    | ss: 23           | 4 Oak street       |                    |     |
|         | City:    | Bro              | adford             |                    | 228 |
|         | State    | /Prov.: IL       |                    |                    | 70  |
|         | Count    | ry: US           | SA                 |                    | 72  |
|         | Posta    | code: 98         | 746                | 6                  |     |
|         | Phone    | e #1 : 90        | 7-555-8742         | O .                |     |
|         | Conta    |                  | ke Smith           |                    |     |

The "Customer" tab contains information regarding the customer of the project.

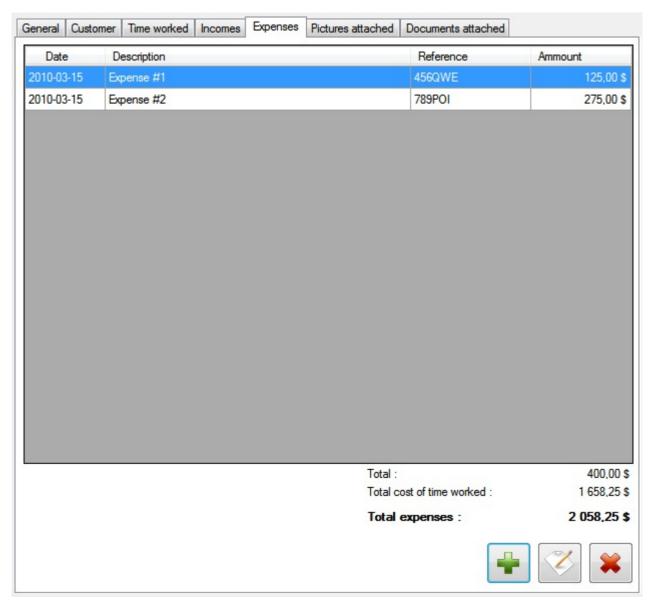


The "Time worked" tab includes time data recorded so far in the selected project. It can display and print project reports according to several criteria.

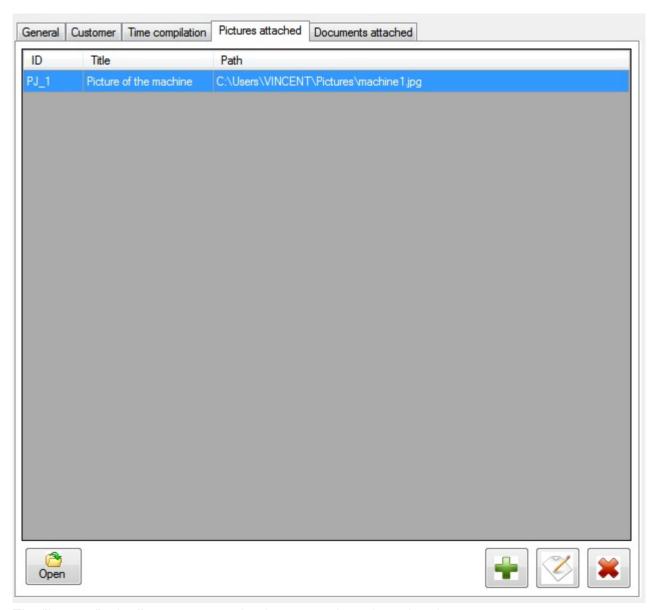
9



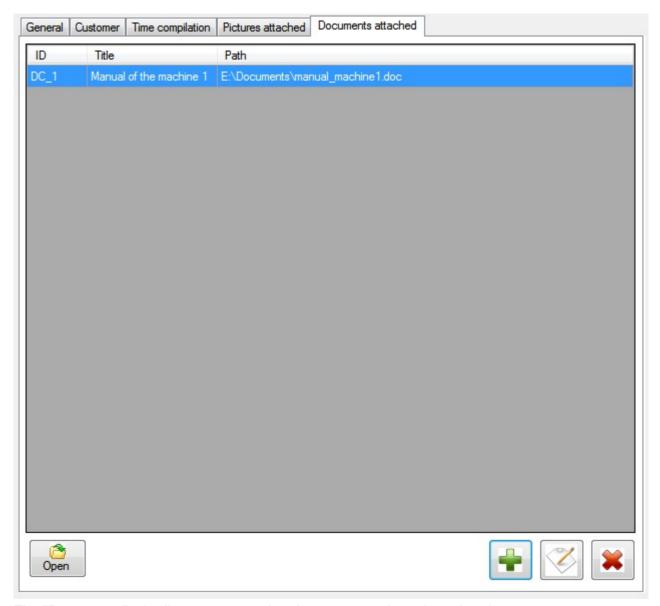
The "income" tab allows to assign incomes to the selected project. You can then generate a comparison report between incomes and expenses regarding the project.



The "Expenses" tab allows to assign expenses to the selected project. You can then generate a comparison report between incomes and expenses regarding the project.

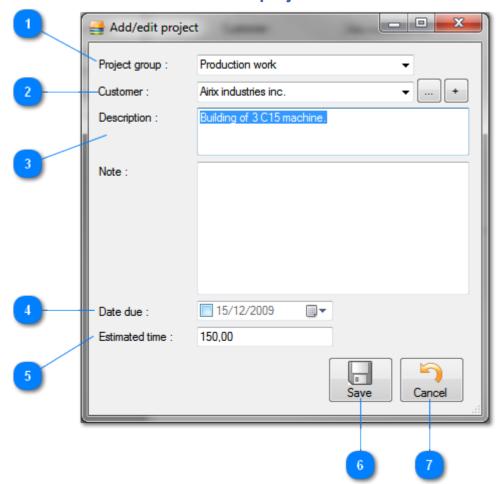


The "Images" tab allows you to assign images to the selected project.

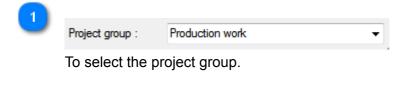


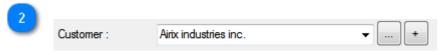
The "Documents" tab allows you to assign documents to the selected project.

# Add/edit projects



This window lets you edit or create projects.

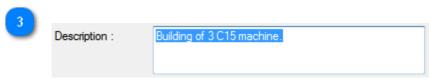




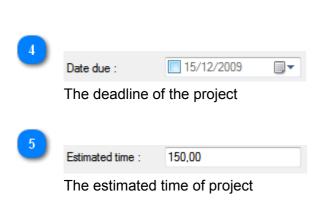
To select the customer

The " ... " button allows to select the customer from a list.

You can create a new <u>customer</u> using the " + " button.



The project's description



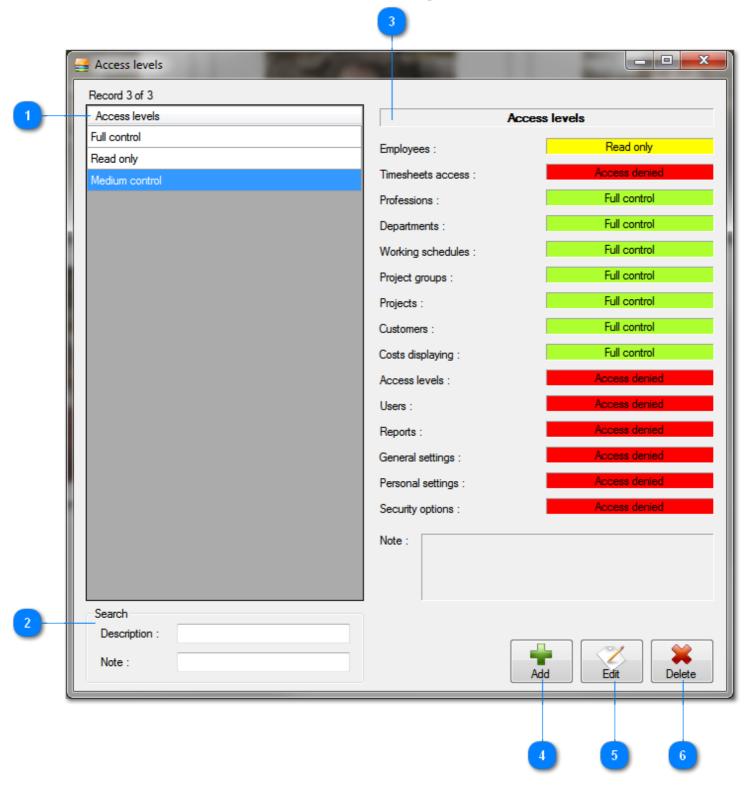


Save the current changes



Cancel the current changes

## **Access level management**



This is the access levels management window. The records are displayed according to the <u>search box</u> located below it.

| Record 3 of 3  |  |
|----------------|--|
| Access levels  |  |
| Full control   |  |
| Read only      |  |
| Medium control |  |

This is the list of access levels. The records are displayed according to the search box located below the list

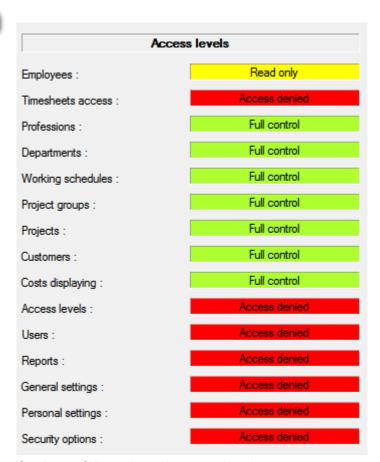
To edit a record, you can double-click on it or use the "Edit" button to access the <u>Add/edit access levels</u> window.

2

| Search       |  |
|--------------|--|
| Description: |  |
| Note :       |  |

You can search for a record using the various settings available in this box. The wildcard character "\*" is allowed in research.

3



Settings of the selected access level.





Adds a new access level using the Add/edit access levels window.





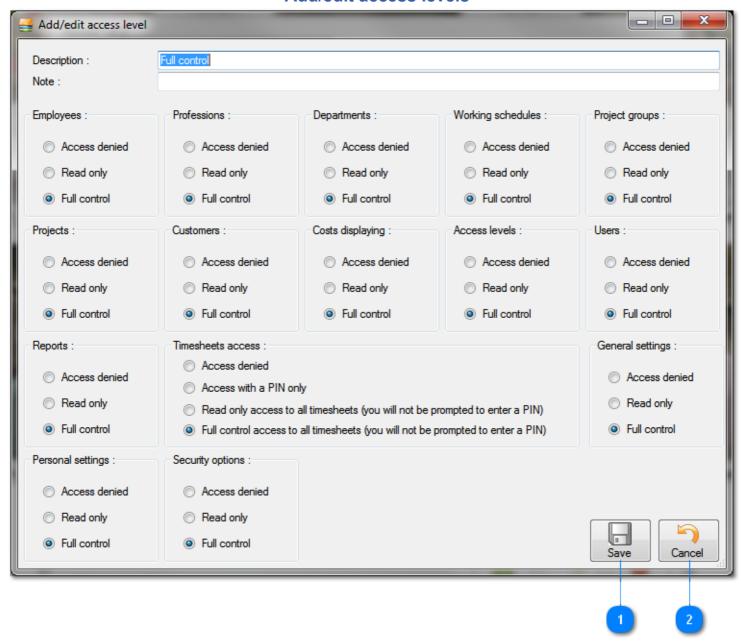
Edit the current access level using the Add/edit access levels window





Allows you to delete selected records

#### Add/edit access levels



This window lets you edit or create access level.

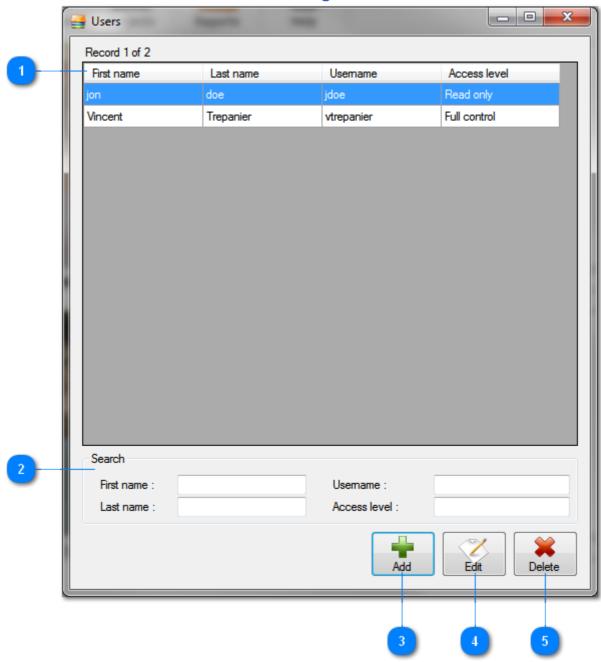


Save the current changes

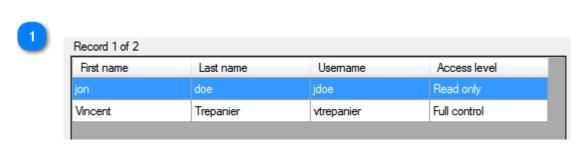


Cancel the current changes

## **User management**



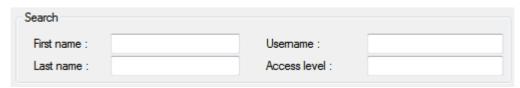
This is the users management window. The records are displayed according to the <u>search box</u> located below it. You can set <u>access levels</u> and <u>users</u>. This let you limit access to various features of the software for some users. To enable the management of users, you must check the "Activate security login" of the <u>Security options</u> window. When launching the software, a window will ask the user to identify himself using his username and its password. The username "admin" is configured by default with a blank password. This username can access all the features of the software and can not be deleted. However, you can change the "admin" password using the button provided therefor in the <u>Security Options</u> window.



This is the list of users. The records are displayed according to the <u>search box</u> located below the list.

To edit a record, you can double-click on it or use the "Edit" button to access the Add/edit users window.

2



You can search for a record using the various settings available in this box. The wildcard character "\*" is allowed in research.





Adds a new user using the Add/edit users window.

4



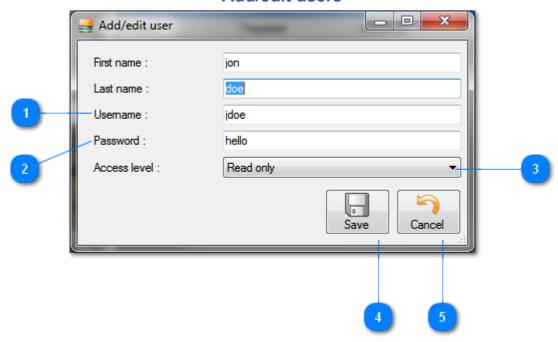
Edit the current user using the Add/edit users window

5

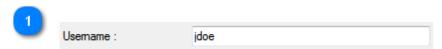


Allows you to delete selected records

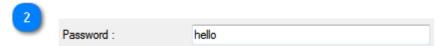
#### Add/edit users



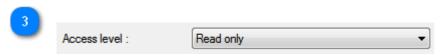
This window lets you edit or create users.



The username. It will be asked when the software is launched (if security logins are enabled). See the <u>Security Options</u> window for details.



The password. It will be asked when the software is launched (if security logins are enabled). See the <u>Security Options</u> window for details.



Let you select the access level of the user.



Save the current changes



Cancel the current changes

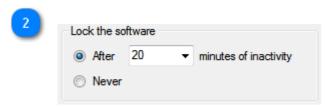
### **Security options**



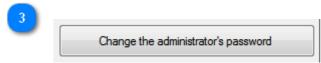
This window allows the management of security options related to user logins used to access the software. You can set <u>access levels</u> and <u>users</u>. This let you limit access to various features of the software for some users. To enable the management of users, you must check the "Activate security login" of the <u>Security options</u> window. When launching the software, a window will ask the user to identify himself using his username and its password. The username "admin" is configured by default with a blank password. This username can access all the features of the software and can not be deleted. However, you can change the "admin" password using the button provided therefor in the <u>Security Options</u> window.



To enable the users management functionalities. When opening the software, a window will ask the user to identify himself with his username and its password.



Sets the locking parameters. You can choose to lock the program after a certain time or you can choose to never lock. Once the software is locked, a user must enter their username and password in order to unlock.



The username "admin" is configured by default with a blank password. This username can access all the features of the software and can not be deleted. However, you can change the "admin" password using this button.





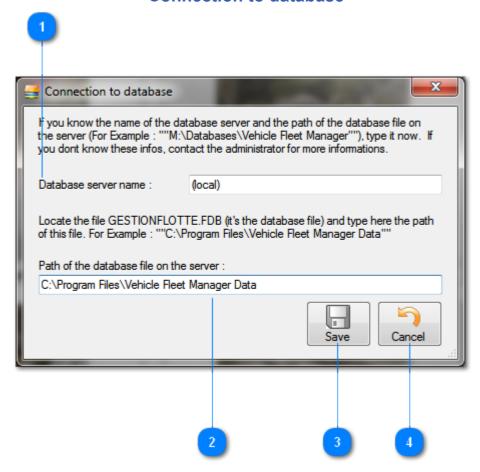
Save the current changes





Cancel the current changes

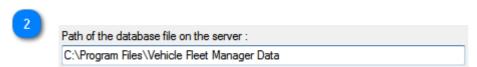
#### **Connection to database**



This window allows configuration of database connection settings. For more details on how to setup the program on a local network, see topic How to setup Biz Timesheet Manager on a network



The Database server name. This is the name of the computer on which resides the database. If Biz Timesheet Manager is used in local mode only, you must enter "(local)" in this field, as shown in the picture. Otherwise, you must enter the computer name. See topic <a href="How to setup Biz Timesheet Manager">How to setup Biz Timesheet Manager</a> on a network for more details.



The path of the database file on the server. This is the database location on the server computer. See topic <u>How to setup Biz Timesheet Manager on a network</u> for more details.

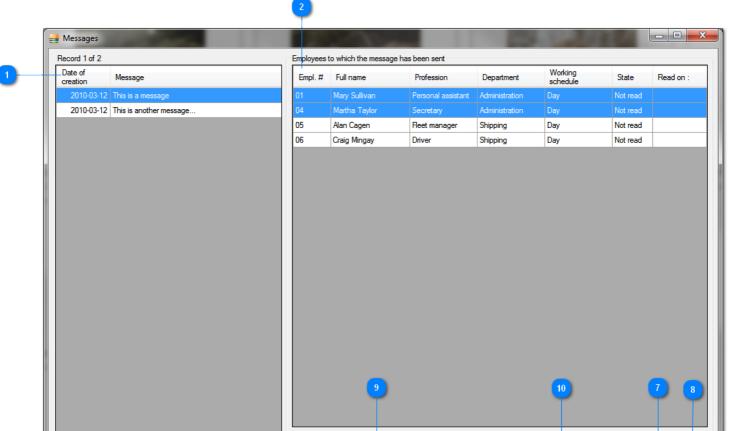


Save the current changes



Cancel the current changes

### Messaging

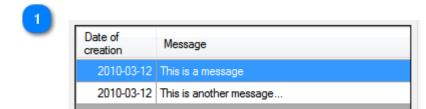


Send as an email to the selected employees

Send as a SMS to the sele

This window allows you to create and send messages to employees. You first have to create your message in the left list and then assign employees to them using the right list. Messages will be displayed to employees at the opening of their time sheet.

If you wish, you can also send messages via email or text message (SMS). To do this you need to configure email, cell phone number and cellular carrier of your employees in <a href="Employees management">Employees management</a> window. You must also configure the <a href="Sender's email address">sender's email address</a> and the <a href="Outgoing SMTP">outgoing SMTP</a> email server in the <a href="Parameters">Parameters</a>.



This is the list of messages.

To edit a record, you can double-click on it or use the "Edit" button to access the <u>Add/edit messages</u> window.



| Employees to which the message has been sent |   |   |   |  |   |  |  |
|--|---|---|---|--|---|--|--|
| Full name                                    | Profession  | Department  | Working schedule  | State  | Read on :   |  |  |
| Mary Sullivan                                | Personal assistant                                  | Administration  | Day   | Not read   |   |  |  |
| Martha Taylor                                | Secretary   | Administration  | Day   | Not read   |   |  |  |
| Alan Cagen                                   | Fleet manager                                       | Shipping  | Day   | Not read   |   |  |  |
| Craig Mingay                                 | Driver  | Shipping  | Day   | Not read   |   |  |  |
|  |   |   | ,   | 1.541000   |   |  |  |
|  | Full name  Mary Sullivan  Martha Taylor  Alan Cagen | Full name Profession  Mary Sullivan Personal assistant  Martha Taylor Secretary  Alan Cagen Fleet manager | Full name Profession Department  Mary Sullivan Personal assistant Administration  Martha Taylor Secretary Administration  Alan Cagen Fleet manager Shipping | Full name Profession Department Working schedule  Mary Sullivan Personal assistant Administration Day  Martha Taylor Secretary Administration Day  Alan Cagen Fleet manager Shipping Day | Full name Profession Department Working schedule State  Mary Sullivan Personal assistant Administration Day Not read  Martha Taylor Secretary Administration Day Not read  Alan Cagen Fleet manager Shipping Day Not read |  |  |

This is the list of employees who are assigned to the selected message in the left list.





Adds a new message using the Add/edit messages window.

4



Edit the current message using the Add/edit messages window

5



Allows you to delete selected records

6



Exit this window

7

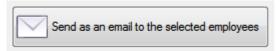


Allows you to assign employees to the selected message using the <u>Selecting employee(s)</u> window.

8



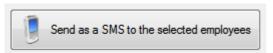
Allows you to remove the selected employees from the list.



This button allows you to send the selected message to selected employees as an email.

To use this feature you need to configure email of your employees in <u>Employees management</u> window. You must also configure the <u>sender's email address</u> and the <u>outgoing SMTP email server</u> in the <u>Parameters</u>.

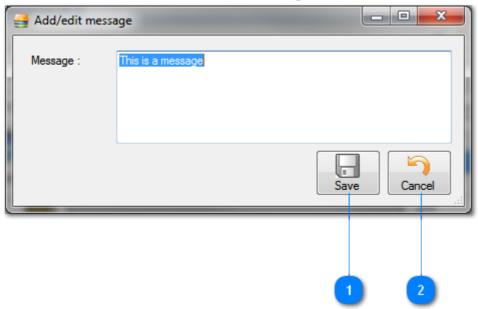




This button allows you to send the selected message to selected employees as an SMS (text message).

To use this feature you need to configure cell phone number and cellular carrier of your employees in <a href="Employees management"><u>Employees management</u></a> window. You must also configure the <a href="Sender's email address"><u>sender's email address</u></a> and the <a href="Outgoing SMTP email server"><u>outgoing SMTP email server</u></a> in the <a href="Parameters"><u>Parameters</u></a>.

## Add/edit messages



This window lets you edit or create messages.

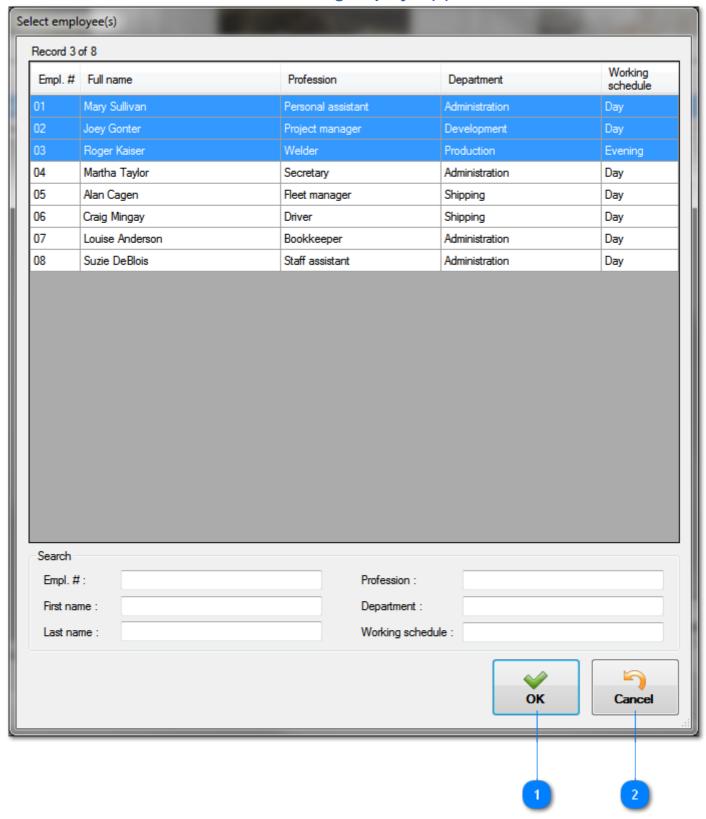


Save the current changes



Cancel the current changes

## Selecting employee(s)



This window allows you to select one or more employees



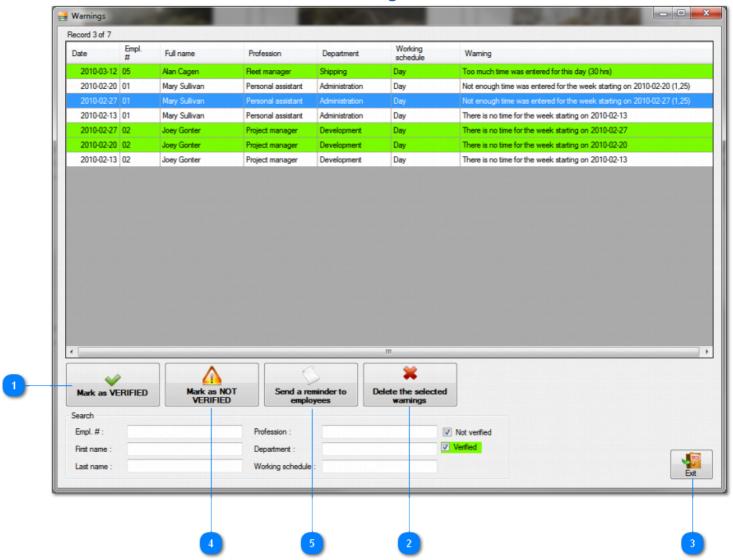
Validate the selection

2



Cancel the selection

## **Warnings**



This window allows the management of warnings related to erroneous entries in the time sheets of employees. Several types of warnings can be generated:

- 1. Too much time was entered for a day
- 2. Not enough time was entered for one week
- 3. Time overlap





Mark as VERIFIED

Allows you to mark the selected messages as verified. They then appear in green.





#### Delete the selected warnings





Exit this window

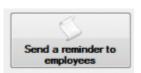




Mark as NOT VERIFIED

If one or more messages are marked as VERIFIED, this button allows to mark the selected messages as NOT VERIFIED. They then appear in white.

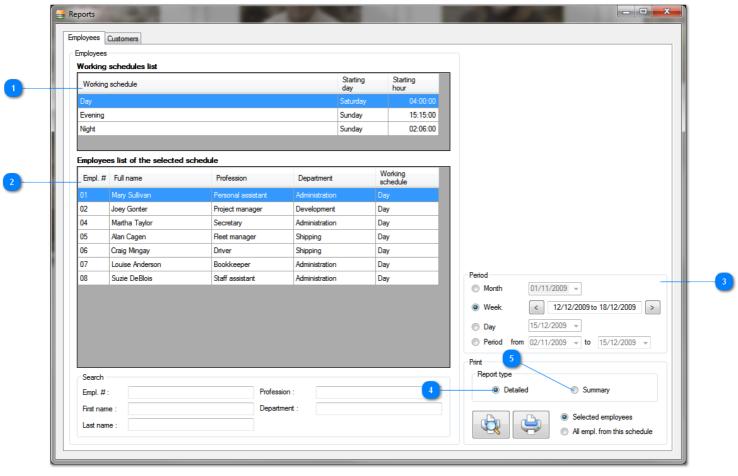




Send a reminder to employees

This button will send a reminder to employees of selected warnings. This message will appear to them at the next opening of their timesheet.

## **Reports**



This window allows you to generate reports regarding employees and customers. For project reports, please consult the <u>"Time worked" tab</u> of the <u>Project management</u> window.

Working schedules list

| Working schedule | Starting day | Starting<br>hour |
|------------------|--------------|------------------|
| Day              | Saturday     | 04:00:00         |
| Evening          | Sunday       | 15:15:00         |
| Night            | Sunday       | 02:06:00         |

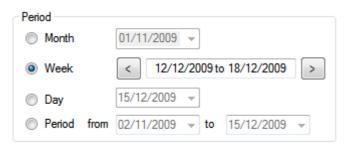
List of <u>work schedules</u>. You must first select a work schedule before you can select one or more employees for printing.

#### Employees list of the selected schedule

| Empl. # | Full name       | Profession         | Department     | Working schedule |
|---------|-----------------|--------------------|----------------|------------------|
| 01      | Mary Sullivan   | Personal assistant | Administration | Day              |
| 02      | Joey Gonter     | Project manager    | Development    | Day              |
| 04      | Martha Taylor   | Secretary          | Administration | Day              |
| 05      | Alan Cagen      | Fleet manager      | Shipping       | Day              |
| 06      | Craig Mingay    | Driver             | Shipping       | Day              |
| 07      | Louise Anderson | Bookkeeper         | Administration | Day              |
| 08      | Suzie DeBlois   | Staff assistant    | Administration | Day              |

List of employees. Select the employees you want to include in reports.

3



The "Period" frame allows you to select the period to show in the report.

4

Detailed

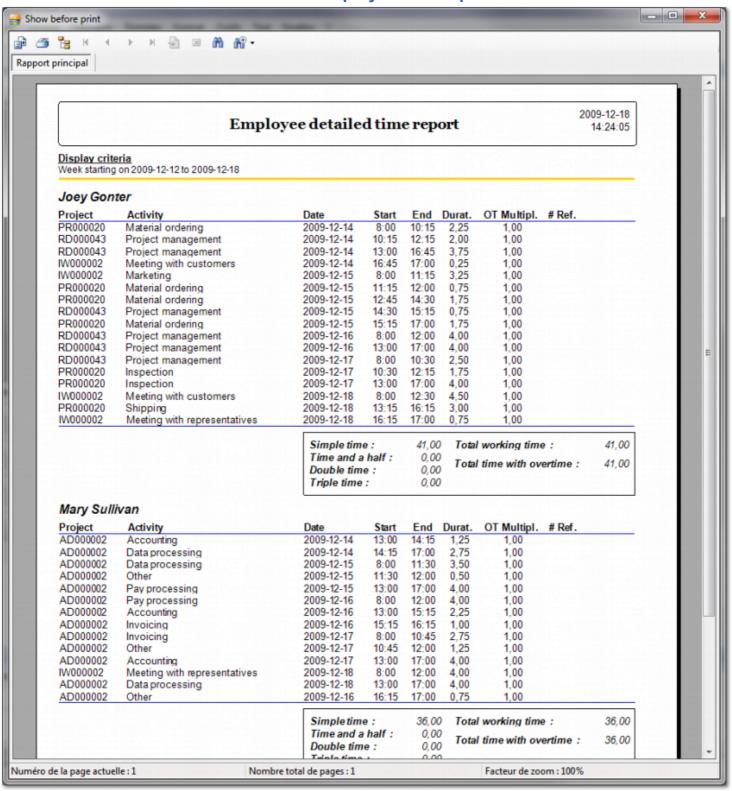
Show a <u>detailed report</u> including all time records.

5

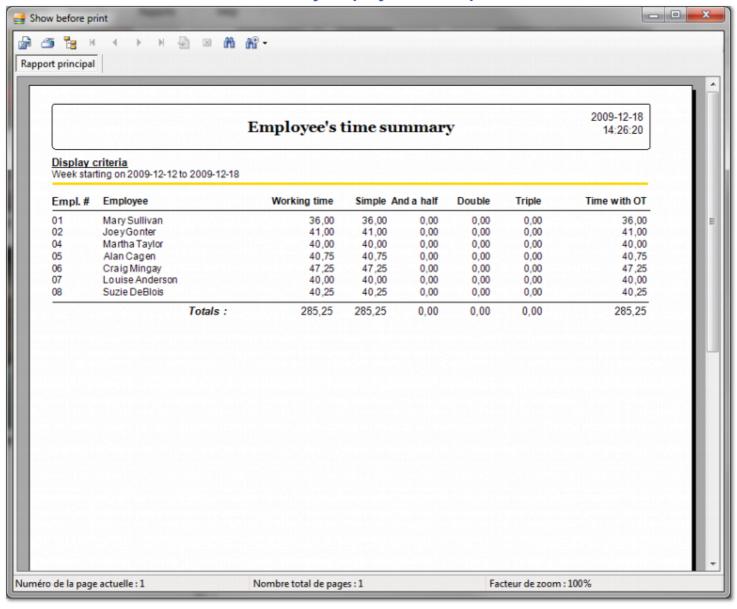
Summary

Show a summary time report.

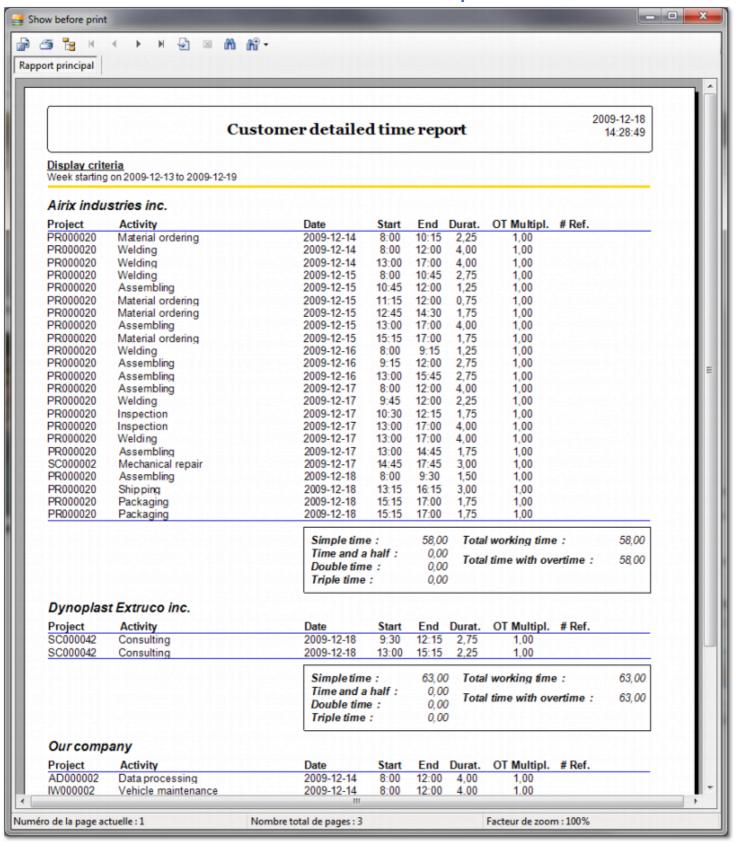
#### **Detailed employee time report**



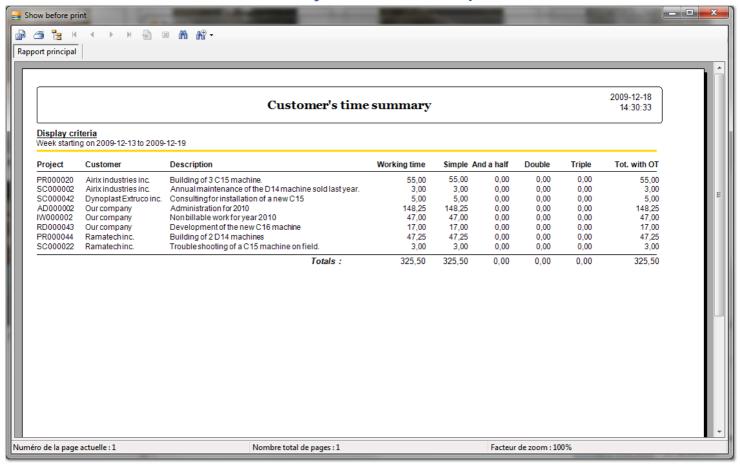
## Summary employee time report



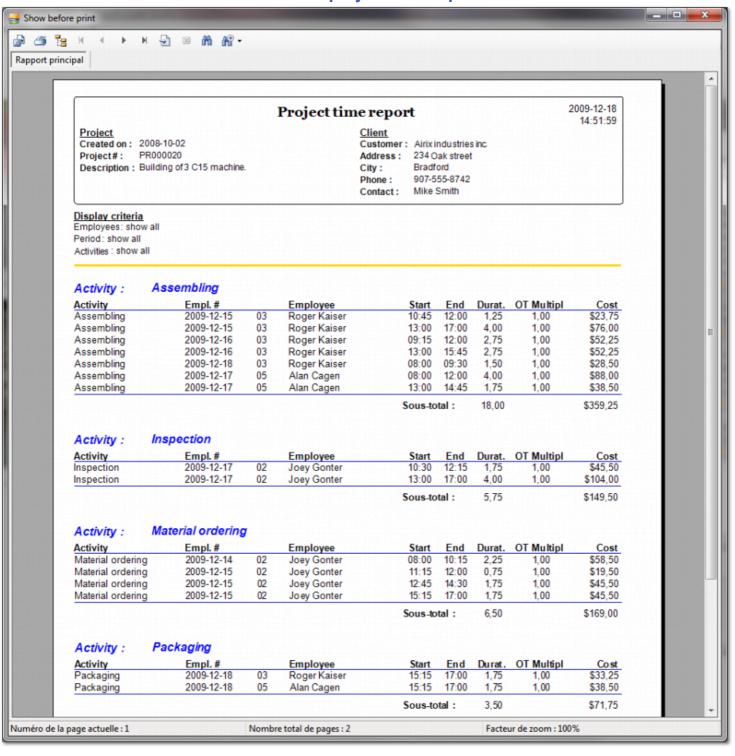
#### **Detailed customer time report**



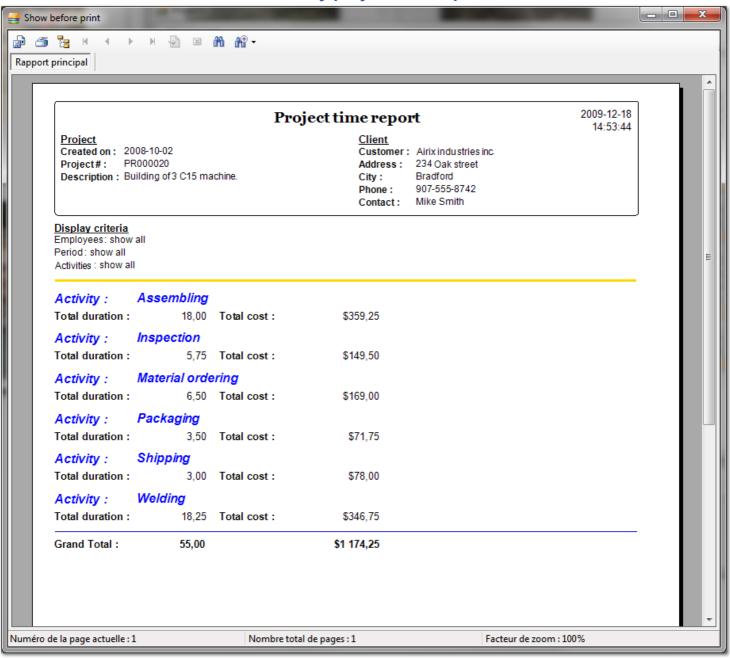
# **Summary customer time report**



#### **Detailed project time report**



## **Summary project time report**



#### How to setup Biz Timesheet Manager on a network

#### How can I set up Biz Timesheet Manager on my local network?

- 1. Install the Biz Timesheet Manager programme (<a href="www.biztimesheetmanager.com/download/BizTimesheetSetup30.exe">www.biztimesheetmanager.com/download/BizTimesheetSetup30.exe</a>) on your data server. The data server can be any computer on your local network.
- 2. Install the Firebird component on your database server (<a href="www.biztimesheetmanager.com/download/fbnetwork.exe">www.biztimesheetmanager.com/download/fbnetwork.exe</a>). IMPORTANT!: the installer programme will ask you where you want to install the Firebird programme and will then ask you where you want to install the database. The Firebird programme needs to be installed on the same drive as the database itself.
- 3. Activate your server. To do this send us your server identification code and we will send you the corresponding activation code. To obtain your identification code you need to click on "Activate now" in the Biz Timesheet Manager (trial version) start up window.
- 4. Make sure that the TS\_DBase.FDB database file is in your server's "C:\Program Files\Biz Timesheet Manager Data" folder (or the folder specified during database installation). If the "Program Files" folder on your server is not on the C drive then search for it on the appropriate drive (for example: "M:\Program Files\Biz Timesheet Manager Data"). This path will be the one that you will need to set up on your client workstation at the next stage.
- 5. Open Biz Timesheet Manager on your server and go to menu "Options Personnalize". Replace the name of the database server for the server name. If you do not know the name of the database server then, right-click on "Workstation", choose "Properties" and select the "Computer name" tab.
- 6. Go to a client workstation. Install Biz Timesheet Manager (<a href="www.biztimesheetmanager.com/download/BizTimesheetSetup30.exe">www.biztimesheetmanager.com/download/BizTimesheetSetup30.exe</a>), launch the application and click on the "Options Database connection information" menu and enter your server name in the appropriate box. If you do not know the name of the database server then go to your server, right-click on "Workstation", choose "Properties" and select the "Computer name" tab.
- 7. On the workstation enter the server database path at the appropriate place (for example: "C: \Program Files\Vehicle Fleet Manager Data").
- 8. Close the Biz Timesheet Manager application on your client workstation and restart it. The programme should automatically connect to the database. If it doesn't work it is probably because the database path is incorrect. If these parameters are correct your server probably has a firewall. Most computers have a firewall. If so, you need to deactivate it or set up a firewall exception. You need to set up a firewall exception for the following programme file: "C:\Program Files\Firebird\Firebird\Firebird\Firebird\Control Panel Firewall". Click on add programme in the "Exceptions" tab, click on browse and choose the following file: "C:\Program Files\Firebird\Fi