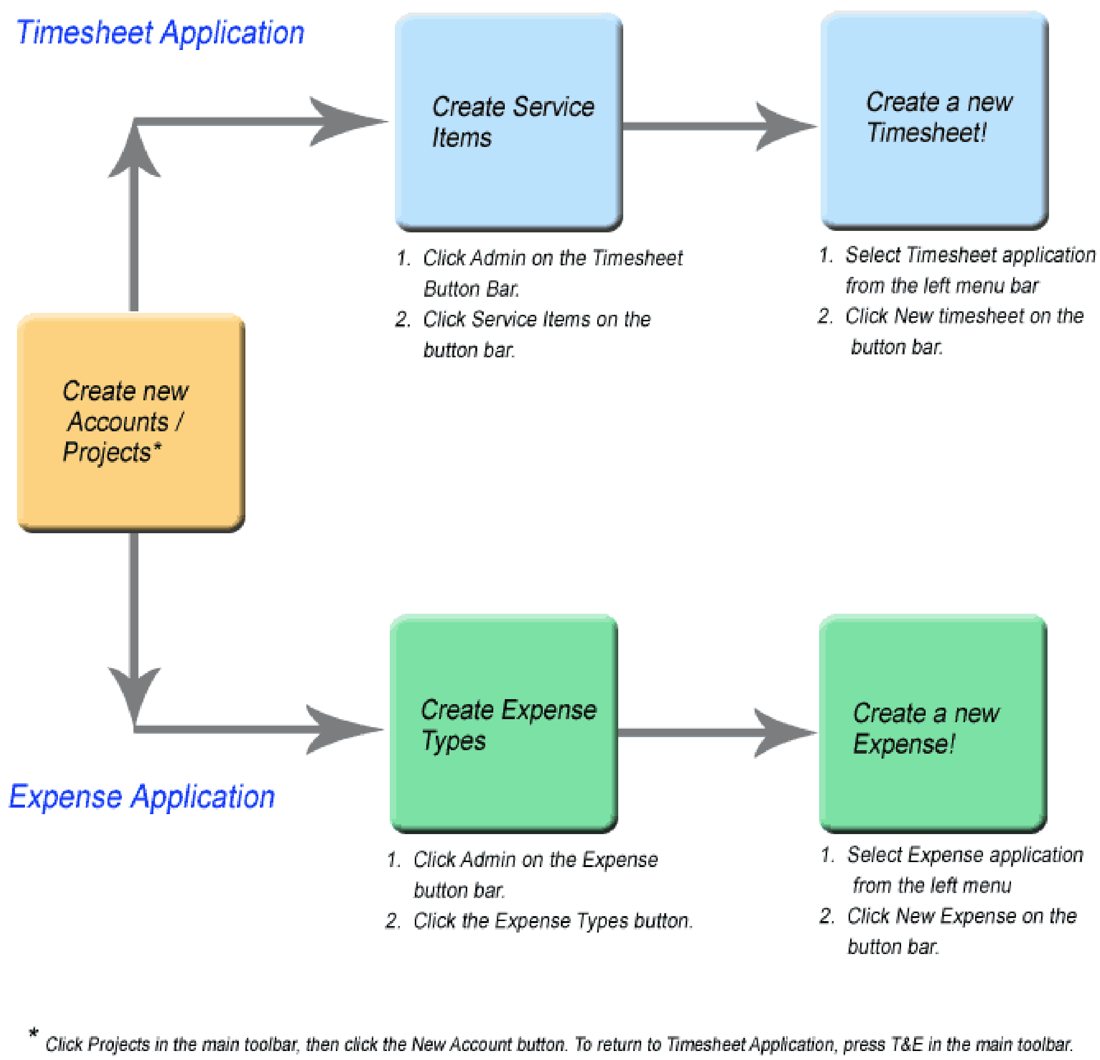
Quick Setup for Administrators

Super Quick Start for Timesheet and Expense



Contents

1. a - Customer/Account Setup

Creating Accounts in the Projects Application provides the ability to organize and group Projects (and subsequently, Member Timesheets) according to specified Customers, Clients or other top-level entities. Additionally, it helps to maintain account details and filtering information when creating reports.

Accounts

1. Click on the Timesheets icon from the left bar (at the bottom)
2. Select the Projects Icon on the left bar.
3. Select New Account from the projects toolbar.
4. Enter required (*) information.
5. Click on the Save button (below form).

1. b - Project Setup

Projects are used to associate Timesheets/Expenses to specified projects. These details can help track budgets and time allocated to certain activities.

Projects

1. Click on the Timesheets icon from the left bar (at the bottom)
2. Select the Projects Icon on the left bar.
3. Click on the Account Name to go to the Project List, then the New Project button from the projects toolbar.
4. Enter required (*) information.
5. Click on the Save button (below form).

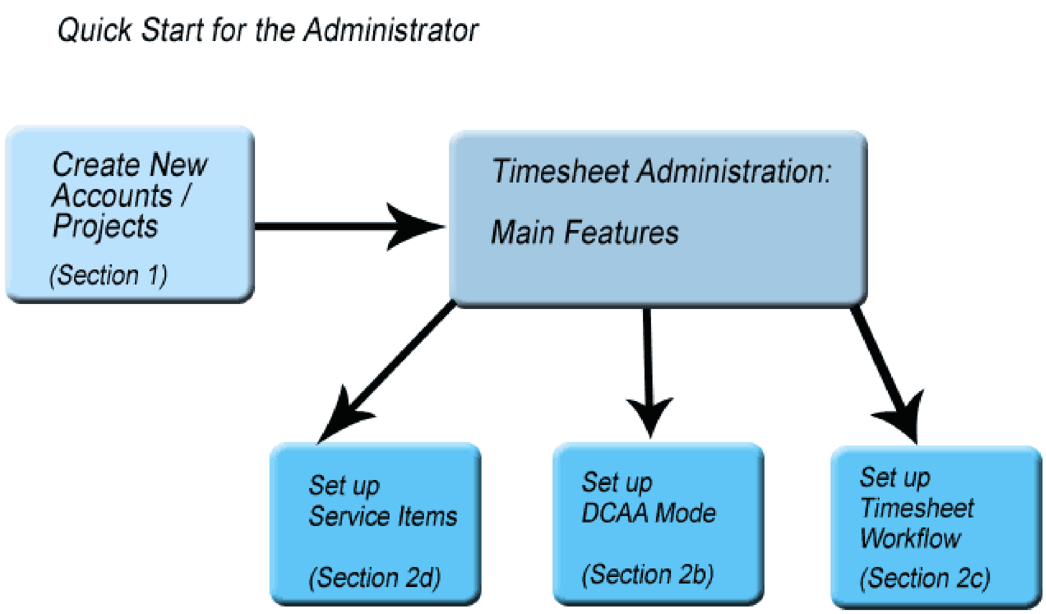
1. c – Allocating Members to Accounts, Projects

Members (users) can be allocated to multiple Accounts, Projects. Therefore, timesheets/expenses can be appropriately configured for the respective members.

1. Click on the Timesheets icon from the left bar (at the bottom)
2. Select the Projects Icon in the left bar.
3. Select Admin in the Projects toolbar.
4. Select Allocate Project or Allocate Member within the Projects toolbar.
5. Select Members/Project from the drop-down menu list. (Accounts and Projects are represented as: “Account: Project”
6. Select boxes for those Members/Projects to be allocated
7. Click Save.

Application Administration (Timesheet & Expenses)

Timesheet



2. a – General Settings/Profiles

The Profiles feature allows customization of the Timesheet Entry Form which Members will input their details.

1. Select the Timesheet Icon from the left toolbar.
2. Select Admin in the Timesheet toolbar.
3. Select Profiles in the Timesheet toolbar.
4. Edit the given options.
5. Click Save. (Save & Next will continue to the next Admin feature)

2. b – DCAA mode

For those organizations which are required to work according to DCAA (Defense Contract Audit Agency) regulations, OfficeClip provides a DCAA mode which can be enabled to format Timesheets for these specific audits.

1. Select the Timesheet Icon in the main OfficeClip toolbar.
2. Select Admin in the Timesheet toolbar.
3. Select Profiles in the Timesheet toolbar.
4. Find the Enable DCAA Mode (end of the form)
5. Change setting to Yes.
6. Click Save. (Save & Next will continue to the next Admin feature)

2. c – Workflow

The Workflow feature provides routing/approval options for timesheets.

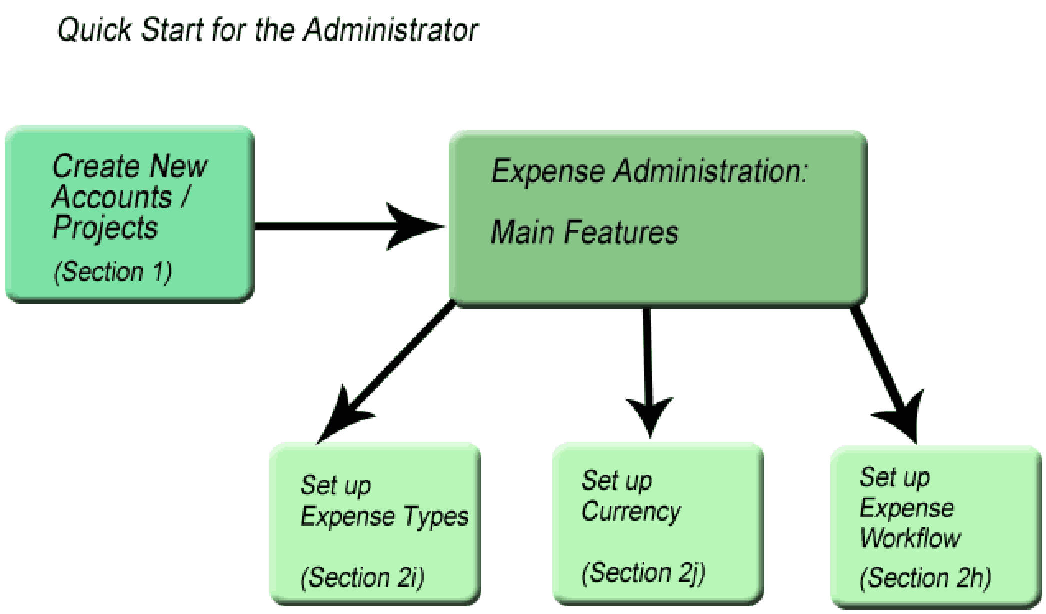
1. Select the Timesheet Icon in the main OfficeClip toolbar.
2. Select Admin in the Timesheet toolbar.
3. Select Workflow in the Timesheet toolbar.
4. Select the Member whose timesheet you wish to configure.
5. Click Setup.
6. Select Type of Routing.
7. Select Notification Options.
8. Click Save.

2. d – Service Items

Service Items (billable entities) can be customized to create timesheet templates that can be used for a specified Account or Project.   This allows administrators/managers to control which Service Items, Members are able to submit time for.

1. Select the Timesheet Icon in the main OfficeClip toolbar.
2. Select Admin in the Timesheet toolbar.
3. Select Service Items in the Timesheet toolbar.
4. Select the Member whose timesheet you wish to configure.
5. Click Setup.
6. Select Type of Routing.
7. Select Notification Options.
8. Click Save.

Expenses



2. g – General Settings/Profiles

The Profiles feature allows customization of the Expenses Entry Form which Members will input their details.

1. Click on the Timesheets icon from the left bar (at the bottom)
2. Select the Expense Icon in the main OfficeClip toolbar.
3. Select Admin in the Expense toolbar.
4. Select Profiles in the Expense toolbar.
5. Edit the given options.
6. Click Save. (Save & Next will continue to the next Admin feature)

2. h – Workflow

The Workflow feature provides routing/approval options for expense reports.

1. Click on the Timesheets icon from the left bar (at the bottom)
2. Select Expense from the left-side menu.
3. Select Admin in the Expense toolbar.
4. Select Workflow in the Expense toolbar.
5. Select the Member whose timesheet you wish to configure.
6. Click Setup.
7. Select Type of Routing.
8. Select Notification Options.
9. Click Save.

2. i – Expense Types

Setting Expense Types provides Members will help organize expense records and provide control over the item type, display name, whether it's billable to a client, and other features.

1. Click on the Timesheets icon from the left bar (at the bottom)
2. Select Expense from the left-side menu.
3. Select Admin in the Expense toolbar.
4. Select Expense Types in the Expense toolbar.
5. Edit the given options.
6. Click Save.

2. j – Currency

For those organizations working with contractors, consultants, or customers internationally, the Currency feature allows expenses to be entered from specified users in various currencies/rates.

1. Click on the Timesheets icon from the left bar (at the bottom)
2. Select Expense from the left-side menu.
3. Select Admin in the Expense toolbar.
4. Select Currency in the Expense toolbar.
5. Select the local currency from the drop-down menu. Click Add.
6. Enter the rate of exchange.

To specify a particular Member:

7. Click Setup User Currency.
8. Set the currency for the user in the respective drop-down menu.
9. Click Save.