

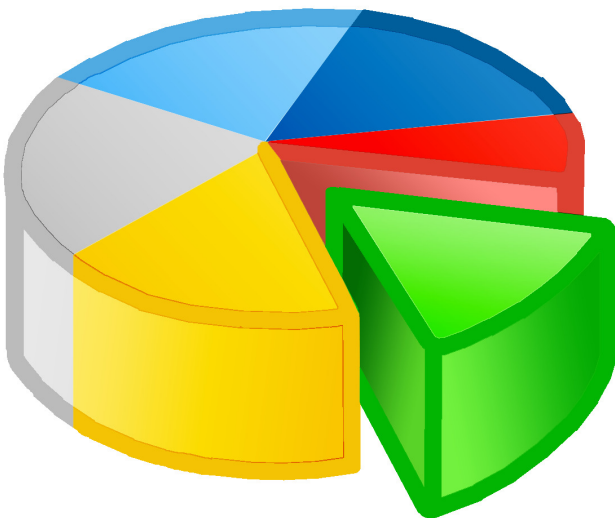


worktimer

Getting started

Setup WorkTimer

(for the manager)



About this document

As a manager/administrator you are responsible for setting up WorkTimer. This manual describes the actions required to get you and your organization started.

WorkTimer suits your organization

To start using WorkTimer, all you have to do is create *users* (employees) and *projects*. If you wish you can also add *activities*, *departments* and *customers*. But this is not obligatory.

WorkTimer can be used for both global and very precise time registration. Basic idea while setting up WorkTimer is: If you don't want to know something, don't measure it. This way you keep WorkTimer simple for both you and the end-users.

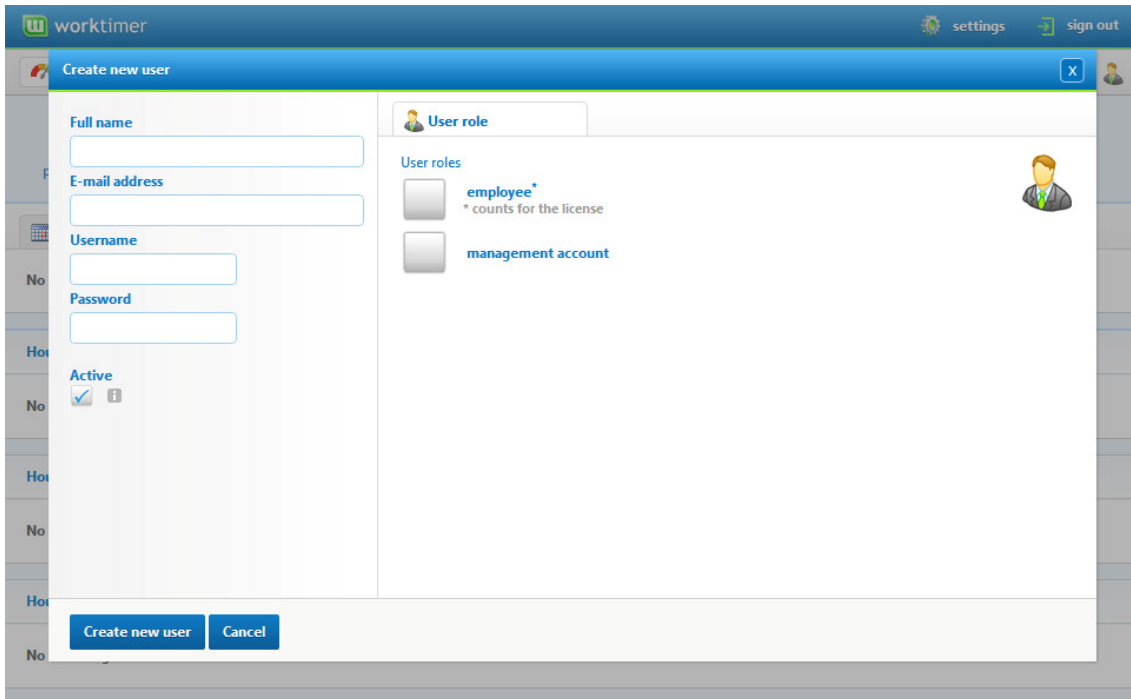
Login

You can login via www.worktimer.com or using the direct address www.worktimer.com/login. Choose to login as 'manager' to get access to the management module.

Creating users

Create an account for every employee or manager who is going to use WorkTimer. You can add a few details about the user in this stage. This information will be available for reporting purposes later on.

Select in menu 'Management tasks' the item 'Create new user'. The following dialog appears:



Enter the name, email address and login credentials for the user. The user/employee will login using the account information you supply here.

TIP

On departure of a user you can disable the user by un-checking 'Active'. The already recorded work time and data will remain available for reporting purposes. This is not the case when an employee is completely removed from the system, which is therefore discouraged.

Roles

One user can have one or more roles. The following roles are available:

Employee

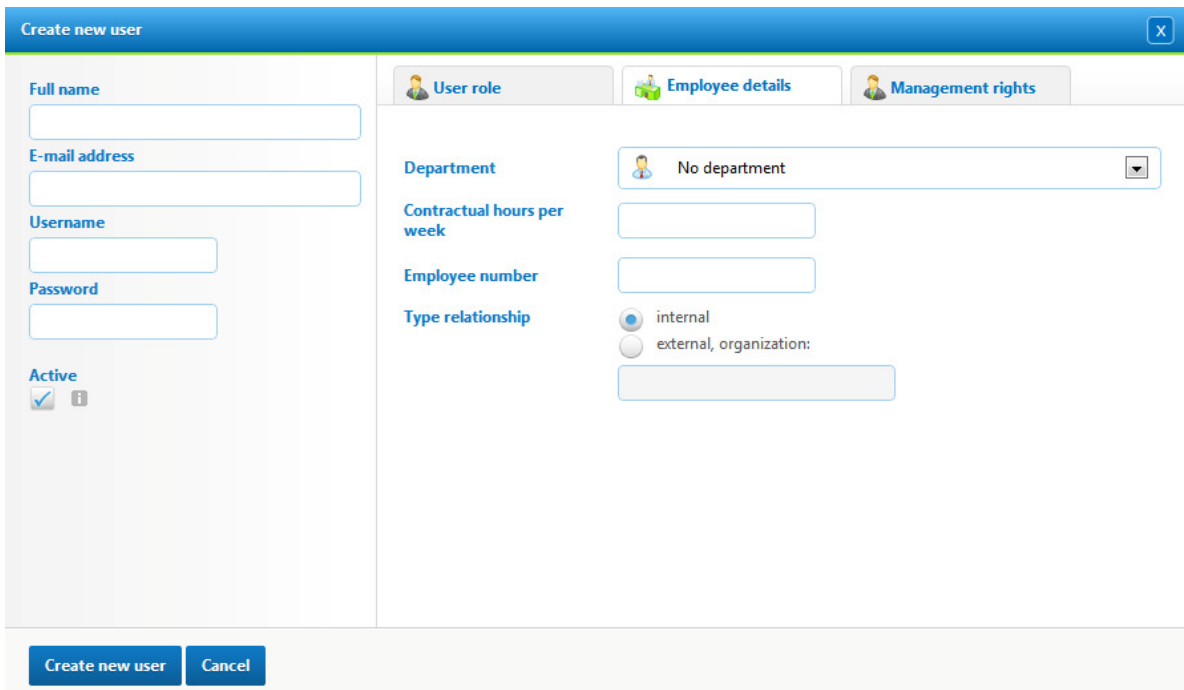
Can register hours via WorkTimer. An employee can be either internal or external. Active employees count for your license.

Management account

A management user can (if he is entitled to do so) create projects, employees and reports.

Select the appropriate roles for the new user. Everytime you select one of the roles a new settings tab will appear.

Employee details



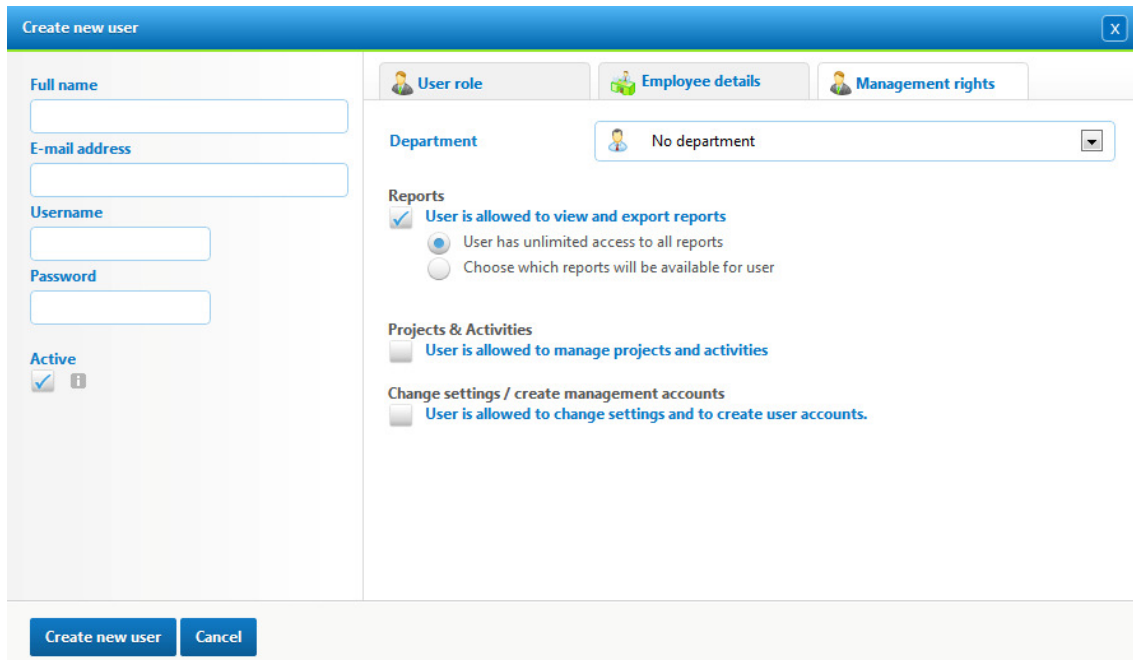
The screenshot shows a 'Create new user' dialog box with three tabs: 'User role', 'Employee details', and 'Management rights'. The 'Employee details' tab is active. On the left, there are input fields for 'Full name', 'E-mail address', 'Username', and 'Password', along with an 'Active' checkbox. The right side of the dialog contains the following fields:

- Department:** A dropdown menu currently showing 'No department'.
- Contractual hours per week:** An empty input field.
- Employee number:** An empty input field.
- Type relationship:** Radio buttons for 'internal' (selected) and 'external, organization:'. Below this is an empty input field.

At the bottom of the dialog are two buttons: 'Create new user' and 'Cancel'.

Select the department where the employee works. Then add the Contractual Hours per week and employee number if available. You can use this number in a later stage when linking to your financial system.

Management rights



The screenshot shows the 'Create new user' form with three tabs: 'User role', 'Employee details', and 'Management rights'. The 'Management rights' tab is active. On the left, there are input fields for 'Full name', 'E-mail address', 'Username', and 'Password', along with an 'Active' checkbox. The right side of the form contains the following settings:

- Department:** A dropdown menu currently set to 'No department'.
- Reports:** A checked checkbox 'User is allowed to view and export reports' with two radio button options: 'User has unlimited access to all reports' (selected) and 'Choose which reports will be available for user'.
- Projects & Activities:** An unchecked checkbox 'User is allowed to manage projects and activities'.
- Change settings / create management accounts:** An unchecked checkbox 'User is allowed to change settings and to create user accounts'.

At the bottom of the form are two buttons: 'Create new user' and 'Cancel'.

Select the department the new management user is responsible for. The manager will only see projects, users and results for his own department; not for the entire organization. Select 'No department' to grant the new management account access to reports for the entire organization.

You can check what features the management account will have:

Reports

User is allowed to generate reports. You can specify whether the user has access to all or just a limited number of reports.

Projects & activities

User is allowed to create/manage projects and activities.

Change settings/create management accounts

The user is allowed to create new (management) users and to alter business settings.

Creating projects and activities

Now you have added your employees, you can create projects. Projects form the base of the WorkTimer time registration and reports.

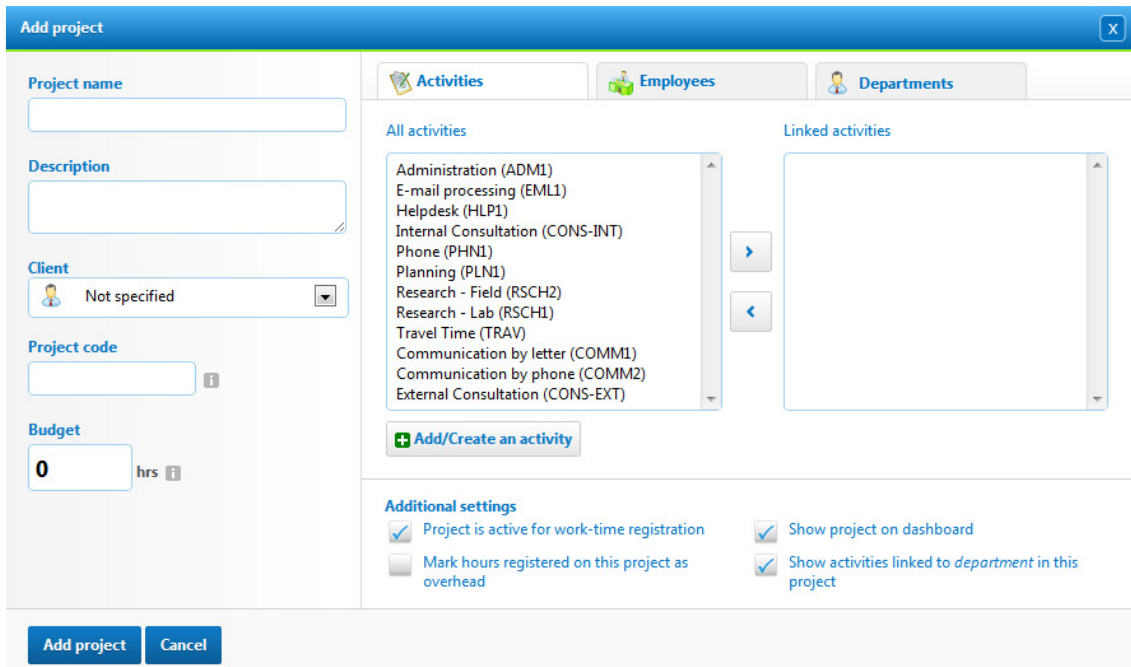
Activities

You can directly create activities while adding a new project. Activities can be best seen as tasks; things you do; or cost centers. Linking activities is not mandatory for the creation of a project. Without you can still record the general duration of the project.

Activities are being reused between the different projects. Because of this it is possible to compare recorded hours regardless the project. It is good practice to think well about how and if your organization needs activities or not, and if so which activities should be available.

Add project

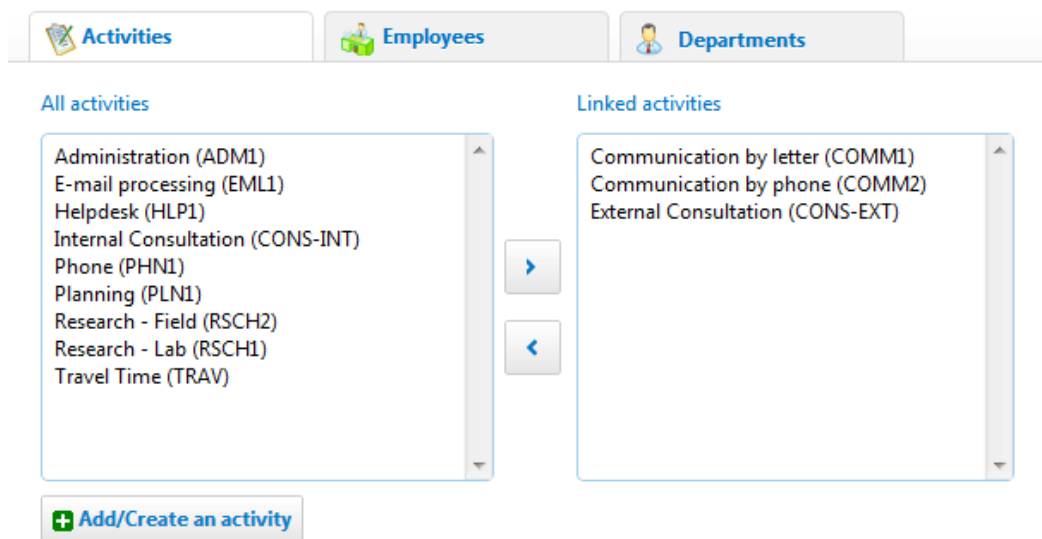
Select in menu 'Management tasks' the item 'Create project'. The following dialog appears:





Linking the project

On the right of the dialog you see the tabs *activities* and *employees*. The Business Edition contains an additional tab, *departments*.

Pressing one of these tabs gives you the ability to link the new project to one of the before mentioned items. The operation of all tabs is the same, so let's take the *Activities* tab as an example:



The field 'All activities' will be empty if this is the first time you enter this screen; create new activities first. Click the 'Add/Create activity' button to do so.

To link an activity to the new project, select the activity in the leftpanel and press  to link the activity. To unlink the activity from the project select the activity in the right panel and press the  button to unlink the activity from the list 'Linked activities'. You can also double click activities to (un)link.

Additional settings

Project is active for work-time registration

You can remove this checkmark when the project is completed. The project is no longer available for time tracking: your employees cannot register new hours on this project. The hours are still available in your reports.

Mark hours registered on this project as overhead

Allows you to define projects as overhead. For example, you can create an illness and leave, or other non-billable project. The reporting modules allow you to create a breakdown between overhead and actual (billable) project hours.

Show activities linked to department in this project

Users of the Business edition of WorkTimer can connect activities directly to a department. All projects belonging under a certain department will get the same set of activities. This functionality is especially useful when you have a large number of projects. It won't be necessary to link the activities to each separate project.

TIP

Deleting a project will automatically remove all data associated with it, even from your dashboards and totals. It is therefore usually better to deactivate projects or employees instead of removing them.