

A young woman with dark hair and bangs, wearing a purple t-shirt under a grey and white striped cardigan, is smiling broadly and shaking hands with another person whose arm is visible on the left. The background is a bright, slightly blurred indoor setting.

Setting-up Team Working

A guide to Networking Timesheet Xpress or Timesheet Collect.

Overview Getting Started – Timesheet Xpress

Timesheet Xpress is designed for small and medium sized enterprises (SMEs). The product can be used stand alone or networked, indeed within a team you can have some users networked while other may be running stand alone, most users run networked with shared data. Some elements of data which can be networked and/or shared (via the Networking and Sharing Wizard) are:-

- The users weekly timesheet files (*.tsh)
- The Client, Project and Task List (ClientProjectTasks.cpt)
- The Employee Billing Rates (BillingRates.tbr)

Within the program there is a 'Networking and Sharing Wizard' which will guide you through the process of setting this up! Before you start we would advise you consider the following:-

- Decide how users' names will be input to the program, for example, J Kirk, JT Kirk, James T Kirk, James Kirk, Jim Kirk, J K....
- Decide how the company name should be input, "Self & Co", "Self and Co", "Self & Company", etc. It is better, although not essential, that all users input the same company name.
- You will also need to decide the location of the folder where users' weekly timesheet files and the 'Client, Project and Task List' are to be located, we would suggest that you create (using Windows Explorer) a folder location on a shared server, for example:- \\Server\Company\Shared Data\Timesheet Xpress\ this is where all the shared data will be kept
- NB Timesheet Xpress will create its own subfolders, one of which will be called 'timesheets'. Be careful when you run the wizard on the second and subsequent PCs not to select the folder named 'timesheets' which the program has created, rather remember to select the same folder you originally specified.

\\Server\Company\Shared\timesheets\employee timesheets\ this is where the timesheets will be kept. We recommend that all users save their timesheets in the same shared folder \\Server\Company\Shared\timesheets\task lists\ this is where the Client/Project and Task (CPT) List and Billing Rates will be kept.

Now download the latest release from www.TimesheetXpress.com and save the installer file (TXSetup.exe) on a shared location, you can then use this single installer to install the program on all your colleagues' PC's. When you install the program it will be installed locally on each PC (typically in C:\Program Files\Timesheet Xpress).

Open Timesheet Xpress on the 'Managers' or 'Time Coordinators' PC and run the Networking and Sharing Wizard. This will allow you to move the 'Client, Project and Task List', 'Billing Rates, and your to the shared server location.

Now run Timesheet Xpress on each of your colleagues computer. Now either run the Networking and Sharing Wizard on each users' PC, or use the [Central & Local Configuration Files](#) to allow you to link each installation of Timesheet Xpress to the shared data and define the common location where timesheets are to be saved. We also suggest that you protect the Client, Project and Task List with a password. Setting up is fairly easy, should you encounter any problems [we are here to help!](#)

Notes on Configurations– Timesheet Xpress

Timesheet Xpress is designed for SME's and teams within larger organisations. The product includes features to help your team work more productively and effectively. The program will help you increase productivity and hence profit.

Share your Client, Project & Task (CPT) List

Client, Project and Task names are stored in the program and can be easily shared with colleagues, simply run the 'Networking and Sharing Wizard' in the Tools Menu. This wizard will let you move your 'Client, Project and Task List' to a shared location, or lets you 'point' your program installation to a list already on a shared location. You can also run this Wizard for all your colleagues' installations of the program and 'point' them to this same List; hence all of you will be using the same CPT List. A password can be set for further protecting the CPT List and Billing Rates List. For larger installations, [we recommend you using the Central Configuration File \(See below\)](#)

Save weekly Timesheets to a shared location

Each of your weekly Timesheets is a single data file, typically called:- "Week_39_Sep_20_2006_Your Name.tsh" and is saved (by default) in the local (PC) folder, "My Documents\Timesheets" Using the Networking and Sharing Wizard you can define another location for saving your timesheets, normally on a shared network drive. Running the Networking and Sharing Wizard will allow you to store all employees timesheets on a single networked location and therefore run aggregated reports.

Central & Local Configuration (large roll-outs)

The Configuration Files are a tool to ease the setting up of larger network roll-outs, rather than having to run the Networking and Sharing Wizard on all users' PCs.. The files are used to centrally and remotely define control the locations of the Client, Project and Task List, Default Timesheet Folder, Billing Rates and User List (Timesheet Collect only), as well as the Default Company Name and Web Update Settings.

The Local Configuration File (stored locally on each users PC, in the Program's Folder, defines the position or location of the Central Configuration File, while the Central Configuration File defines the position or location of the various shared files.

Timesheet Xpress lets you create both these files via the Network and Sharing option in the Tools Options Menu. You can then push the files out to the correct locations. See the Help file.

Productivity Analysis

You can 'globally' define whether some Clients, Projects or Tasks are 'Chargeable' or 'Non-Chargeable'. Productivity is defined as the amount of 'chargeable time' as a percentage of the total amount of time charged to a client, project or task. Decide what is chargeable (productive) for your company and what's not. Productive tasks may be different for different employees. Within the Manage Lists option you can set the various tasks as chargeable or non-chargeable; once set-up you can then run the various Productivity Analysis graphs.

Different billing rates for employees, clients or projects.

The Program allows you to run billing reports using different billing rates for each employee and client/project. The billing rates for each employee or client/project are only applied at the time of running the report, the rates applied are taken from the specific 'Billing Rates List' used by the user running the report.

Only the user that actually runs and creates the billing reports (that is, the Manager or Coordinator) need input and maintain these billing rates; this allows confidentiality as other users have no access to this information without the password. The Billing Rate data can be kept locally or saved on a network location.

To input and edit the rates, click on the "Manage Billing Rates" option in the Billing Reports Menu, you can scan for new employees, add employees and client/projects. When you run the reports the program will search all the timesheets in the specified folder. If it finds an employee or client/project (within an employees' timesheet) which you have not defined a billing rate for, then the program will use the 'Default Billing Rate' which you can also define. You may also define a "Cost Rate" for each employee in the Employee Manager, this lets you run Cost reports for individuals.

Mobile Working (Docking & Undocking)

Timesheet Xpress gives you the ability to disconnect from your local network and work remotely. When you leave your office network (or if there is a network problem) your timesheet data will be saved locally on your PC. Upon return to the network you are asked if you wish to upload the timesheet data to your normal network location.

Changing / Adding Licensed Users (8.5.0 or above)

First make sure you have copies of the old PPN (Product Purchase Number) and PK (Purchase Key). Select the Tools Menu and then Options, within the 'General Tab' on the left there is an option to 'Change Name/Company' click this option and then input the new User Name and/or Company, now click the 'Change Name and company' button. The PPN in the Help About window will change and you must request a Replacement Purchase Key from the Support Centre on www.TimesheetXpress.com. To add a new user or change to a new PC if the licence swap (from another user) request a 'Replacement Key' from that option on the Support Section. If this is an increase in licence count then purchase an additional licence from the website.

Manage Holidays, Leave & Vacations.

The Employee Manager allows you to define the annual leave quota for employees. If Leave is normally paid leave, you must also define the various leave tasks as "nonchargeable" (in the Client, Project and Task List) and in the Employee Manager set the relevant Leave tasks as "Treat as paid working time". To book (future) leave, simply create the timesheet in the future for the leave period and enter the time you wish to take as leave. The Human Resource button allows users to see their own present leave balance, and managers to see all employees leave balances. The Information panel on the main screen shows a summary of the hours worked this week.

Managing Flexi-Time.

The Employee Manager allows you to define whether each employee can have Flexi-Time and any relevant information like starting balances and carry over limits. You may also define the nominal Flexi-Time cycle as x weeks or monthly. The Human Resource button allows users to see their own present flexi-time balance and managers to see all employees flexi-time balances.

Managing Expenses.

Use the Personal Expenses button on the tool bar to open your Personal Expenses window. On the left is listed all the employee names for whom expense files were found in the Expense Folder. To add an expense, first create a new expense file, into which expenses can be inserted), click on "Un-submitted Personal Expenses" under your name, then click the New File button. You will then be offered a default file name in the format "Your User Name Today's Date-Number", for example "Fred Jones 2008- 12-14-1", if you (Fred) then create another file that day, the name of the second will be "Fred Jones 2008-12-14-2".

You can then add or edit expenses, preview and print reports, and export reports as .csv format for use with Microsoft Excel, and other programs. To submit your expenses click on the Submit button at the top of the window, and select the file format to email. Your Timesheet Coordinators email address will appear in the Recipient Email Address field, click on continue to send. It is recommended that you present you Timesheet Coordinator with receipts for all your expenses after submitting them. Two reports are available, Expense Summary Report and Expense Detail report. These reports refer only to the selected file.

Managing Overtime.

The program allows users to set periods of work as overtime which means that you can (a) mark them as "overtime" and if you wish apply a different billing rate to these periods when running billing reports. To mark a time cell as overtime, simply right mouse click on the appropriate time cell and select overtime from the menu, you can then select which overtime rate you wish to apply, you can have up to 3 rates defined, for example 130%, 150% and 200%. Overtime rates are defined in the employee manager. In the Employee manager you can also Globally Disable overtime for all employees. Extending (increasing) the Timesheet Visible Time Cells is also possible via the right mouse menu, you can only increase the visible time cell grid, you cannot decrease it. Simply right mouse click on any time cell, then select "Overtime" from the menu, Select "Edit Start/End Time" then select the extended, new times.

Activities (to-dos)

Click on the Activities button on the Tool bar this will open the Manage Activities window. Click on the Add Activity button at the top of the window and input or select the relevant information. You can use the Progress function to indicate how far along an activity is, and assign the activity to a Client/Project or Task.

Overview (Rules Based)

The Overview in the Administration Menu lets users see a list of all the timesheets in the shared folder location. You can then apply a set of rules to quickly see which timesheets do and don't conform to your set rules.

Project Budgeting

Timesheet Xpress allows you to set budget hours for Client Projects, you can then analyse the time spent on any project against the budget time.

Run reports on Client or Project Work.

We recommend that you save all your team's timesheets in a single shared folder. Timesheet Xpress offers many reports. For example you can:-

- Report on all the work done on one or more clients or projects.
- Report on all the work done by a single employee
- Create an Invoice for Client work.

The Client, Project, Employee Matrix report creates a CSV file which can be viewed or manipulated in Excel and allows you to see all the work done on all projects by all employees. To run any report, simply select the report type and date range. The program does all the collation work. Reports can be saved as pdf, xls, csv, rtf, html or in other data formats.

Manage your remote workers.

You can also manage remote staff, which perhaps have no direct access to the corporate network. From within the program you can:-

- Email updated Client/Project and Task Lists remote colleagues.
- You can email a request for a weekly timesheet to be sent to you

Email your Timesheet

When you first use the program, it will copy your email settings from your installed email program, for example from Outlook or Outlook Express. You may also add up to 2 other email accounts. Remote workers (not on the same network) can at the end of each week, simply click the Email button and their Timesheet (*.tsh file and/or *.pdf) is sent to the various email addressees you have specified in Tools/Options.

Give us your Feedback!

