

TimeTiger

Reference Guide

TimeTiger: Reference Guide

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Time tracking software your people will actually use

TimeTiger is a time and project tracking system that accurately predicts project outcome, simplifies project monitoring and removes the pain of submitting time spent. With TimeTiger you get three key benefits. It is these core values alongside powerful features such as Time Approval, Microsoft Project integration and easy export to Microsoft Excel that make TimeTiger a key contributor to the success of your projects.

- *Quick, painless time tracking* - The only way to ensure complete, accurate entry of time information is to make the process painless for the user. TimeTiger displays an always-available palette of individual tasks and responsibilities on each user's desktop. All they need to do to track time is click on the activity they are currently working on. It sounds simple because it is, and you owe it to your people to keep their project tracking duties as painless as possible.
- *Powerful, customizable reporting* - In addition to the pre-formatted reports you would expect from any time tracking system, TimeTiger includes a simple and powerful custom report designer that allows you to slice and dice your time data to answer almost any real-world question you can come up with. Find out what percentage of a project's time was spent in each phase, or whether a greater time spent on planning translates to less time on implementation and support.
- *The tools to learn from your projects* - As you complete one project and move to the next, TimeTiger will give you the information you need to plan better, implement better, and learn about how your organization does work. The combination of accurate time entry (accurate because it is easy), and targeted, powerful reporting allows you to feed what you've learned from one project cycle into the next, constantly improving your process with each project you do.

How this guide is organized

You can choose to consult this guide as needed or read it through from beginning to end. We have ordered the chapters in a logical fashion for a new TimeTiger system administrator who wants to learn the system in detail. The guide begins with important conceptual information about the TimeTiger System and goes into the installation and configuration processes required to get your system up and running. A discussion of the important user pages and processes follows. Finally, several important administrative features and options are detailed.

This guide is available as part of the TimeTiger Online Help system (accessible through the TimeTiger Explorer, To Do page, or any one of many Help buttons throughout the application) as well as a full, standalone book (or electronic book). To download this guide in electronic form, please visit <https://www.timetiger.com/docs>.

Getting help

Indigo Technologies offers no-charge telephone and email support to prospective customers and customers with existing support contracts. If you are unable to obtain a satisfactory answer to your question online at <https://www.timetiger.com/technical-support> please contact us.

- *Email* - <support@indigo1.com>
- *Telephone* +1-416-815-0759

Chapter 1. Basics

Picking Items from Lists


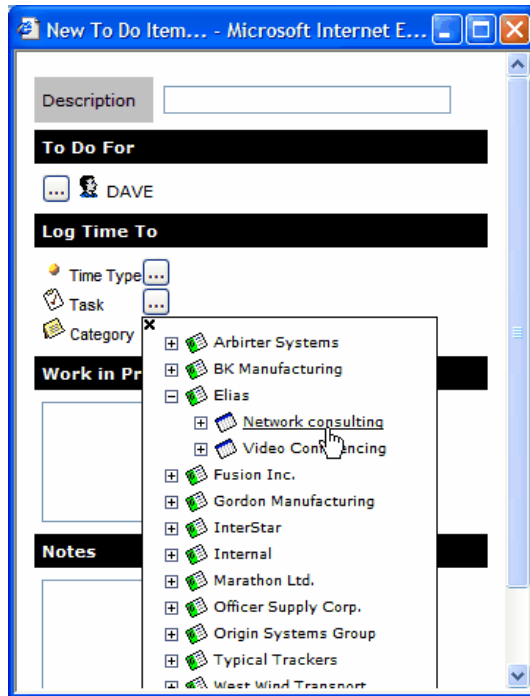




Throughout your use of the TimeTiger system you will be asked to pick items from dropdown lists. These lists are identified with a  button and clicking this button will cause the list to drop down. To pick an item from the list, simply click on it.

Figure 1.1. Picking items from lists



To dismiss the list without making a selection click the small  button at the top-left corner of the list if it appears. If you do not see the  button, you can simply move your mouse pointer outside of the list to cause the list to disappear. Your system administrator controls whether the  button is visible through the Options page.

Some lists are arranged in a "tree" form. For example, when you are asked to pick a Task from the master list your project manager has created, you will need to first choose a Client, then a Project, and finally a Task. To navigate through the list click the  button to the left of each item to expand it. Then click directly on the name of the item you wish to choose.

If you click on an item that you cannot choose (if the item you are asked to choose has to be of a particular type, for example), it will expand instead, and you can try choosing one of the items underneath it.

You will only see items in each list that you have permissions to see and choose. Also, an administrator may have marked an item with a status code that hides it from lists. If an item you expect to see in this list is not present contact your TimeTiger administrator or project manager.

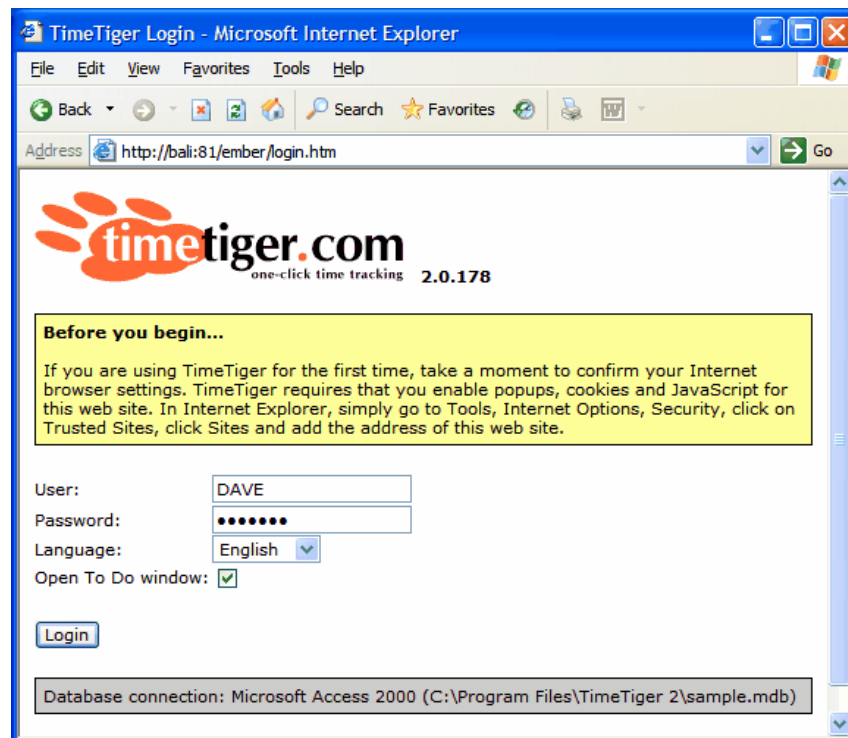
If the list is particularly long it will expand past the bottom of the browser window on your screen and you will not be able to see items past the edge of the browser window. Use the scroll wheel on your mouse to scroll your view down to the bottom of the list or use the down-arrow key on your keyboard.

Chapter 2. Login page

Login Overview

You must log in to the TimeTiger system before using TimeTiger. If you do not have your TimeTiger login and password information (which may be different from your network login credentials), please contact your TimeTiger administrator.

Figure 2.1. Login page



TimeTiger logo and version - the version number of the TimeTiger system is displayed to the right of the TimeTiger logo at the top of the Login page.

User - your TimeTiger user name. This field *is not* case-sensitive.

Password - your password to access the system. This field *is* case-sensitive.

Language - choose the language to use for this session if your TimeTiger application has been configured for multiple languages. Different users can choose different languages and the same user can choose different languages from session to session if they wish. Your browser will remember the language you used the last time you logged into TimeTiger.

Open To Do window - check this box to open the To Do page immediately upon logging in. Your browser will remember your choice from the last time you logged into TimeTiger.

Database connection - displays information about the TimeTiger database to which this TimeTiger application is connected.

Login errors

Some common login problems are described below. Unless otherwise noted, error messages appear with a red background near the bottom of the page.

No such user - appears when you have typed an incorrect user name for this specific TimeTiger application. Check that you are accessing the correct URL (the Address indicated at the top of your browser window), as you may be attempting to log into a completely different TimeTiger application that does not list you as an authorized user. Also confirm that you are spelling your user name correctly (note that user names are *not* case-sensitive).

Login failed - appears when you have typed an incorrect password for the user. Check that the capitalization of your password matches the password given to you by your system administrator.

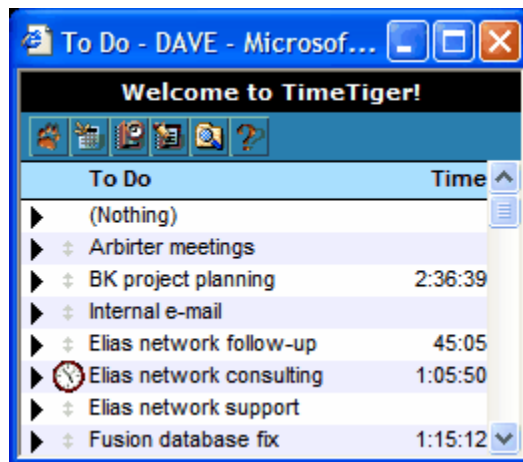
If clicking the **Login** button simply refreshes the page (and does not log you in or present an error message), ensure that your browser is configured to accept *cookies*. You will not be able to log into TimeTiger unless your browser can store cookies from the TimeTiger server.

Chapter 3. To Do page

To Do Overview


Use the To Do page to track time as you work during the day.


Figure 3.1. To Do page




The To Do page is a personal list of all the activities you could be working on over the course of your day. You can add and remove activities as you wish, and other TimeTiger users (such as a project manager) can create new To Do items for you.

Tracking time with the To Do page

Tracking time is as easy as clicking on the To Do item you are currently working on. The  clock icon will move to the item you selected and the time for that item will start ticking up. When you switch to a different activity, click on it to move the clock over and start the timer. When you take a break and are not working on any activity click on the **(Nothing)** item. The **(Nothing)** item does not get recorded in the time log.

Continue to track your time throughout the day by selecting each activity that you begin to work on. You do not need to do anything to stop the timer: just continue to click on activities as you start them. To make manual adjustments to the time accumulated in a To Do item, click the  arrow to the left of the activity and choose **Set Time To...** from the menu. You can use this option to correct errors or add time for items that you did not click on when you first started working on them.

At the end of your day, click the  Log Time button to log the captured time to the database and reset the time in the To Do items. Do not forget to click the **(Nothing)** item before you leave work for the day.

Parts of the To Do page

The To Do page is designed to stay on your desktop as you work on your computer. This keeps the window easily accessible as you select different activities to track during the day. You can move, resize, or minimize the window as necessary. If you close the To Do page you can open it again from the **File** menu of the TimeTiger Explorer. If you have closed all TimeTiger pages you will need to log back into TimeTiger to bring back the To Do page.







The To Do page tries to remember where you left it on the screen so that the next time you log in to TimeTiger it will appear in the same location. To be sure that the screen position is remembered, open the To Do page, size and position it as you wish, then click the **(Nothing)** timer.

The current activity will continue to accumulate time as long as it is selected as your current activity even if you are not logged in to TimeTiger or your computer is disconnected from the network. Even if the TimeTiger Server is stopped or rebooted, the current To Do item will continue to accumulate time and when you are able to log back into TimeTiger no time will have been lost.

The top of the To Do page displays a black status area. Messages and instructions are displayed in this area.



Immediately below the status area is a blue toolbar area. As you move your mouse pointer over the buttons in the toolbar, a brief description of the button will appear in the status area. These are the buttons:

Table 3.1. To Do Toolbar

Button	Command	Description
	Menu	Displays a menu of TimeTiger commands and options.
	New To Do item	Creates a new To Do item by opening the New/Edit To Do page.
	Log Time	Logs your time to the database by opening the Log Time page. To Do items with at least 1 minute of captured time will automatically be entered onto the Log Time page for easy review and submission.
	Edit Time	Opens the View Time Logs page so that you can review or edit logs that have already been recorded in TimeTiger.
	Explorer	Allows you to perform TimeTiger administration or reporting by opening the Explorer page.
	Help	Shows online help.

The largest part of the To Do page lists your various To Do items. The top item is always the **(Nothing)** timer, which represents time spent doing non-work activities. The other items can be added and edited using the New/Edit To Do page.

Each To Do item in your list has a ► arrow to the left of it. Clicking the arrow brings up a menu for the To Do item. You can clear the time recorded for the item or set the time to any amount. Use this feature to correct the times in your To Do items before logging time for the day. This way you can take advantage of the To Do page's ability to fill out the Log Time page automatically.

You can re-order To Do items alphabetically by choosing the appropriate option in the  menu, or you can manually drag-and-drop To Do items within your list by using the  handle.

Making the most of the To Do page

You will not always be able to click on the correct activity when you first start working on it. Back-to-back meetings, unexpected phone calls, and just plain forgetting are all common occurrences during the work day. TimeTiger makes it easy to correct the time tracked in the To Do page and even manually enter the times for the activities you performed during the day (if you were out of the office, for example).

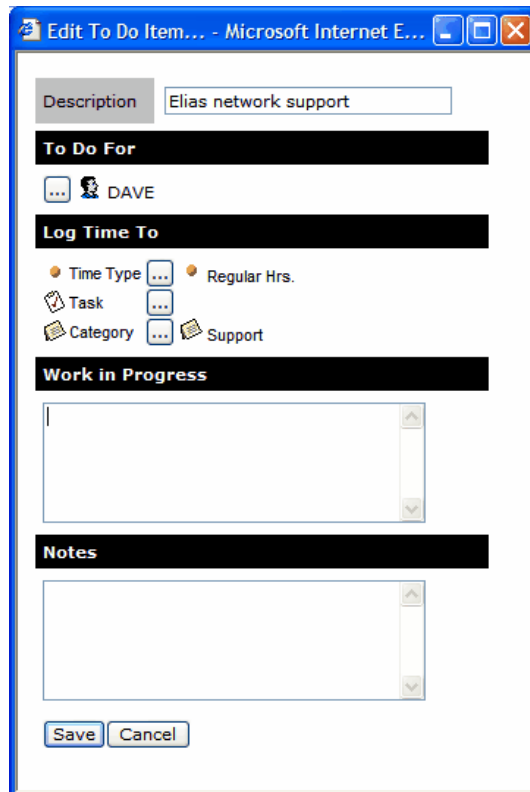
Try to get into the habit of clicking the **(Nothing)** item when taking a break or leaving work for the day. This will save you the effort of correcting your time later.

Chapter 4. New/Edit To Do page

New/Edit To Do Overview

The New/Edit To Do page allows you to create a To Do item (for yourself or for others) or to edit an existing To Do item.

Figure 4.1. New/Edit To Do page




A To Do item is something you might spend time on during your work day. It is your responsibility to maintain your personal list of To Do items, although a project manager or another user (with appropriate permissions) may add To Do items to your list.

To Do items are linked to items in the TimeTiger database that a project manager or a system administrator has created. So, for example, an activity on your To Do list might be linked to a particular Client and Project in the TimeTiger database. When you log time into the database, the time will be logged against that Project.

Creating a To Do item

Description - type a brief, meaningful description of the activity that will make it easy for *you* to recognize in your list of To Do activities. This does not necessarily have to be the same as the official project name, and should first and foremost make sense to you.

The TimeTiger administrator can select whether this Description is used as the default Description for time log records when the Work in Progress field (see below) is blank. This is done from the Options page.

To Do For - the user for whom you are creating the To Do item. Click on the  button to see a list of users for whom you have permissions to create To Do items. You may only see yourself in this list.

Log Time To - link this To Do item with items in the database that have been set up by a project manager or system administrator. You may leave some or all of these links empty for now, but when you log your time to the database you will need to complete the links at that point. All time logs in the TimeTiger database must be fully associated with the items you see in this section. If you are setting up a To Do item in a hurry (for example, if you have just answered the phone and wish to track the time for the conversation), you can leave this section blank and complete it later when you have more time. For help on choosing items from these list (for example, if a list expands past the bottom of your browser window) see Picking items from lists.

Work in Progress - use this section to describe the work you are doing on a particular To Do item during the course of your work day. When you log time to the database this description will appear as the default description for the work that you did (you will still be able to change it on the Log Time page, however).

Notes - type in any reference information or reminders for yourself about this To Do item. This information will not appear anywhere in TimeTiger other than your To Do list so feel free to use this section in a way that is convenient to you.

Chapter 5. Log Time

Log Time Overview

Use the Log Time page to make new time log entries or modify existing entries.

Figure 5.1. Log Time page, Single Day view

Log Time

This page allows you to log time entries into the database. Please fully complete each row you wish to add or modify and click Submit Changes.

View as:

Date:

For: ☐ Multiple Users

Type a status for the work or a detailed description of what was done and hit TAB.

Hrs.	Time Type, Task, Category	% Complete for Task	Status/Description
1.2	Time Type: Regular Hrs. Task: Development Category: Design & Specification	90 / 100	Minor revisions to design specification.
2.4	Time Type: Regular Hrs. Task: Development Category: Internal Mtg. & Proj. Mgt.	75 / 100	Reviewed development progress and rescheduled remaining items.
	Time Type: Task: Category:	0 / 100	
3:36	Total		

Submit changes Cancel Help Add lines: 1 2 3 4 5 6 7 8 9

Log Time Views

You can choose from several views when editing time using the Log Time page. The **View as** dropdown controls your current view.

- *Time Log (single day)* - each row in the grid represents a single time log entry for the date at the top of the Log Time page.
- *Time Log (multiple days)* - each row represents a single time log. The first column of the grid on the screen allows you to choose a different date for each log.
- *Timesheet (one week)* - an entire 7 day period is displayed on the page at once, with dates across the top and the items to which time is logged down the left-hand side. Each entry in this grid can represent

one or more individual time logs. You can choose the 7-day range of the timesheet using the **Dates** dropdown at the top of the page.

- *Timesheet (2 weeks)* - an entire 14 day period is displayed on the page at once.
- *Timesheet (month)* - an entire month is displayed on the page at once.

Figure 5.2. Log Time page, Timesheet view

Log Time

This page allows you to log time entries into the database. Please fully complete each row you wish to add or modify and click Submit Changes.

View as:

Dates:

For: ☐ Multiple Users

Enter the number of hours that you spent on this activity and hit TAB.

Time Type, Task, Category	Mon 06/05	Tue 06/06	Wed 06/07	Thu 06/08	Fri 06/09	Sat 06/10	Sun 06/11	Total
Time Type: Regular Hrs.			9:00					9:00
Client: Arbiter Systems								
Project: Supply-Chain								
Task: Development								
Category: Development								
Time Type:								
Task:								
Category:								
Total	.	.	9:00	9:00

Add lines:



Note


When you make a change to an entry in the timesheet and that entry actually represents multiple existing time logs in the system, TimeTiger will combine the logs that make up the entry into a single, aggregate log. For example, if two separate time logs, each for 1 hour, exist for Project X on a particular date, that entry will appear as a single 2 hour cell in the timesheet view. If you then change this value to 2.5 hours in the timesheet view, TimeTiger will combine the original time logs into a single, 2.5 hour time log.

Parts of the Log Time page

The Log Time page is separated into two sections. The bottom section of the page contains the Log Time grid, where actual time log information can be reviewed and edited. The top section allows you to control your view of the logs and select the logs with which to work.

View as - select the view for entering and reviewing time. As you change the view the current time logs you see on the page will change to reflect your new settings.

Date or Dates - the date or date range for the logs on the page.

For - the user for which you will make log entries All logs you make will be recorded as belonging to this user. Click the  button to see a list of available users. You may only see yourself in this list, but if you have permission to log time on behalf of others you will be able to choose from those users as well.

Multiple Users - this checkbox allows you to select a different user for each time log you enter on this page. Your choices will be limited according to your permissions in the system so you may only see yourself in the list of available users.

Copy blank timesheet from previous period - replaces any logs in the current timesheet period with a blank list of items identical to those that you worked on during the previous timesheet period. You can then assign a number of hours to each item in the list. If you worked on the same items during this period as you did during the last period, this timesaver can give you a head start on entering your time information.

Copy filled timesheet from previous period - replaces any logs in the current timesheet period with an exact duplicate of the logs that you made during the previous timesheet period. If you did exactly the same amount of work on exactly the same items as you did during the previous period, this option can automatically enter the time for you.



The yellow area immediately above the Log Time grid provides instructions and guidance on how to complete each grid field.

Log Time grid

The Log Time grid holds time information that can be viewed and edited provided you have sufficient permissions to do so. You can control the logs shown in the grid by using the fields at the top of the Log Time page. Some or all of the following fields may appear in the Log Time grid, depending on the view you have chosen and on your overall database setup.

Date - the date on which the work was performed.

Hrs. - the amount of time spent on the activity. You can type time in the form hh:mm (such as 2:30 to represent 2 hours and 30 minutes) or in tenths of an hour (such as 2.5 to represent 2 hours and 30 minutes).

Time Type, Task, Category, etc. - each log entry you make must be fully allocated towards items that have been set up by your administrator or project manager. Choose an item for each  button you see in this field. Clicking the  button will present you with a list of items available to you. For help on choosing items from this list (for example, if the list expands past the bottom of your browser window) see Picking items from lists.

% Complete for Task - an estimate of the portion of the Task that has been completed (by you and by everyone else) up to and including this time log entry. When you select a Task item in the previous field, you will automatically see the % Complete currently recorded for the Task. You can update the amount (higher or lower) up to 100 (indicating that the Task is complete) or down to 0 (indicating no progress on the Task). TimeTiger uses % Complete information to calculate projected completion dates and costs. Note that this field might be called *% Complete for Project* if your TimeTiger database does not include Tasks.

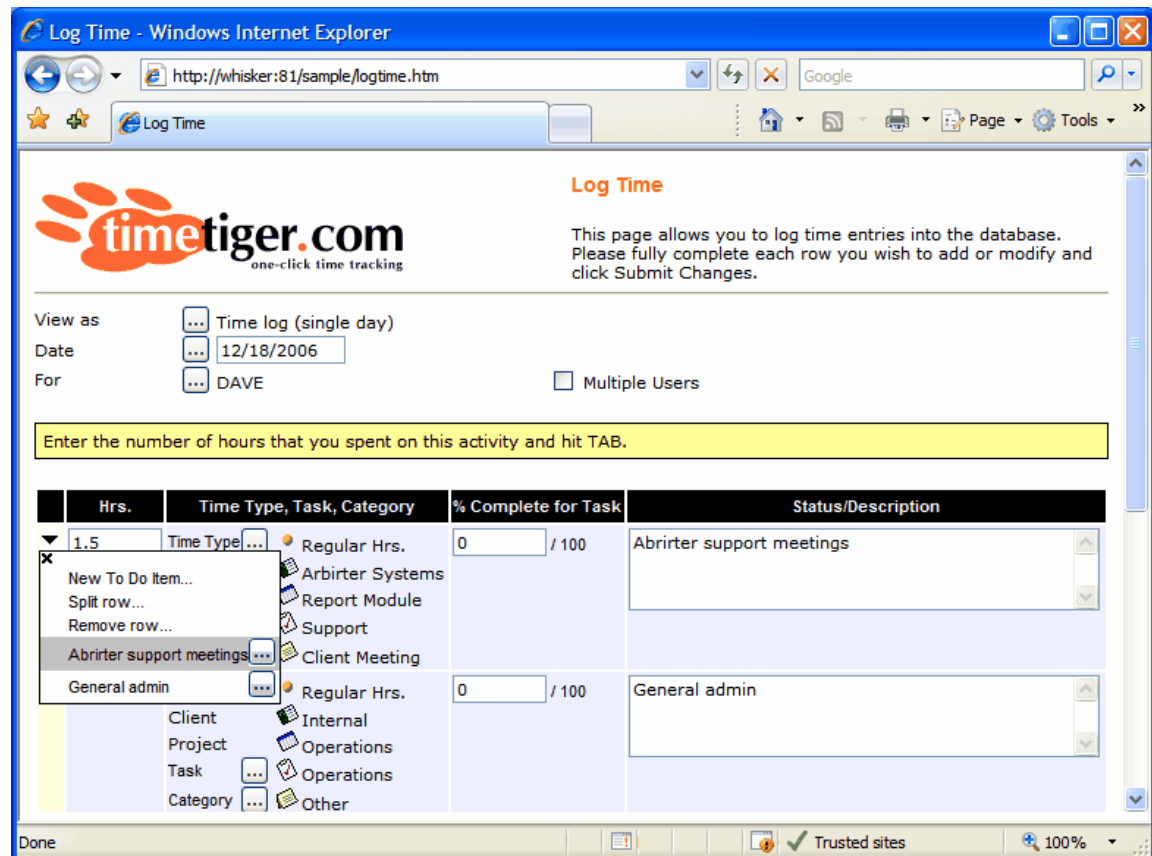
Status/Description - a textual description of the work that you performed for this time log entry. Your TimeTiger administrator or project manager may give you specific guidance for the level of detail expected, but if your organization uses TimeTiger to create client invoices the Status/Description you enter may be included on the invoice sent to the client.

Log Time commands

To the left of each row in the Log Time grid there is an ► arrow that shows a dropdown menu of available commands to perform on that row.

- *New To Do item* - creates a To Do item and adds it to your To Do list, as well as adding the information from the To Do item to this row of the Log Time grid.
- *Remove row* - removes the current row from the Log Time grid. This will not actually delete the time log from the database: you must use the View Time Logs page to delete logs that have already been recorded.
- *Split row* - splits the time log in the current row into a number of identical time logs, each with an equal portion of the total time you have logged. This gives you an opportunity to specify different descriptions for different pieces of work that you performed on the same task. This command is not available in the Timesheet view.

Figure 5.3. Log Time commands



At the bottom of the list you will see your To Do items. Clicking on a To Do item will fill in the row with the information from the To Do item. This is a quick way of selecting items to log time against without actually opening the To Do page.

Clicking the ► button beside a To Do item will allow you to edit or remove that item directly from within the Log Time page.

The following commands appear at the bottom of the Log Time page.

Submit changes - records the time logs in the TimeTiger database. If some time log entries were transferred from the To Do page the corresponding To Do items will be reset to 0 time.

Cancel - cancels any additions or changes you have made on this page and returns you to the previous page you were viewing.

Add line(s) - adds up to 9 blank rows for new log entries at the bottom of the grid. use this button to create some blank space for yourself if you have more than a few entries to make.

Chapter 6. View Time Logs

View Time Logs Overview

Use the View Time Logs page to review logs recorded for items in the TimeTiger system. Select the item whose logs you wish to see, then change the Explorer View to **Time Logs** (from the **View** menu of the TimeTiger Explorer).

You can use the View Time Logs page to select logs you wish to edit and transfer them onto the Log Time page to make your changes.

Figure 6.1. View Time Logs

The screenshot shows the TimeTiger Explorer application running in a Windows Internet Explorer browser. The address bar shows the URL `http://whisker:81/sample/explore.htm?pageid=1`. The application has a top navigation bar with menus: FILE, VIEW, TOOLS, REPORTS, and HELP. On the left is a sidebar with the TimeTiger logo and a tree view showing 'User Groups' (Development, Marketing, Officer Supply Corp., Typical Trackers) and 'Time Types' (Clients, Categories). The main content area is titled 'Time Logs for Development'. It includes filters for 'View as' (Time log (multiple days)), 'Dates' (This calendar year From 01/01/2006 To 12/31/2006), and 'Sort by' (Date (newest first)). A 'Refresh' button is present. Below the filters is a table with the following data:

Edit	Date	Hrs.	Logged to	% Complete	Exported on	Exported by	Status/Description
<input type="checkbox"/>	09/10/2006	3.2	Development KEN Regular Hrs. Gordon Manufacturing Accounting Prototype Project Development	0 / 100			Ongoing development
<input type="checkbox"/>	09/10/2006	3.3	Development DAVE Regular Hrs. Gordon Manufacturing Accounting Prototype Project Development	0 / 100			Ongoing development of system.
<input type="checkbox"/>	09/09/2006	2.0	Development	0 / 100			Got brought in on this project. Dave doled out tasks.

At the bottom of the table, there are buttons for 'Checked logs: Edit', 'Delete', 'Mark as Billed', and 'Unmark as Billed'. The status bar at the very bottom shows 'Done' and 'Trusted sites'.



Note

You will only see logs that you have permissions to view based on the roles you have been assigned in the system (see Role-based Security). When you are restricted from seeing certain logs you will be informed that a number of logs could not be displayed because of insufficient permissions.

View Time Logs Views

You can choose from several views when reviewing logs using the View Time Logs page. The **View as** dropdown controls your current view.

- *Time Log (multiple days)* - each row represents a single time log. You can select the date range for which to view logs.
- *Timesheet (one week)* - a particular 7 day period is displayed on the page at once, with dates across the top and the items to which time is logged down the left-hand side. Each entry in this grid can represent one or more individual time logs. You can choose the 7-day range of the timesheet using the **Dates** dropdown at the top of the page.
- *Timesheet (2 weeks)* - a particular 14 day period is displayed on the page at once.
- *Timesheet (month)* - a particular month is displayed on the page at once.

Figure 6.2. View Time Logs, Timesheet view

The screenshot shows the TimeTiger Explorer web application in Microsoft Internet Explorer. The address bar shows the URL: `http://whisker:81/ember/explore.htm?pageid=1`. The application has a sidebar on the left with the TimeTiger logo and a list of user groups. The main content area displays the 'Time Logs for KEN' view. It includes a 'View as' dropdown set to 'Timesheet (week)' and a 'Dates' dropdown set to 'Mon 06/12 - Sun 06/18'. A 'Refresh' button is present. Below this is a table showing time logs for user KEN.

User, Time Type, Task, Category	Mon 06/12	Tue 06/13	Wed 06/14	Thu 06/15	Fri 06/16	Sat 06/17	Sun 06/18	Total
Development KEN Regular Hrs. West Wind Transport Remote Administration Development		5:12			6:42			11:54
Development KEN Regular Hrs. West Wind Transport Remote Administration Testing & Deployment Testing & Bug Fixes						5:30		5:30
Development KEN	9:24				3:54			13:18

At the bottom of the page, there is a 'Timesheet logs:' label followed by 'Edit' and 'Delete' buttons.

Parts of the View Time Logs page

The View Time Logs page is separated into three parts. The main, middle section of the page contains the time logs you have chosen to review. The top portion of the page is dedicated to helping you select which logs you wish to review. A narrow row on the bottom of the page provides command buttons for acting on the logs you have selected.

You can immediately limit the logs you see on this page by clicking on an item in the left-hand side of the Explorer tree. The view will refresh to show you logs for only that item and any sub-items. You can select items at any level of the tree structure on the left-side view to focus on exactly the logs you wish to see.

You can limit the date range for the logs you see by choosing a value from the **Dates** dropdown. If you choose a *Custom* date range, click the **Refresh** button to refresh the list of logs on the page.



Note

It is a good idea to restrict your view to only the logs you wish to immediately work with as selecting a large number of logs will slow down the responsiveness of this page.

The *Sort By* list allows to you choose the order in which you would like to see time logs.

View Time Logs commands

The bottom strip of the View Time Logs page contains a set of buttons that allow you to act on the displayed logs. If you are in the *Timesheet (week)* or *Timesheet (2 weeks)* view, clicking one of these buttons will act on *all* the logs you see on the page. If you are in the *Time log (multiple dates)* view, you must select individual logs to act on by clicking the **Edit** checkbox to the left of each log. Selected logs will be highlighted in orange on the screen.

If you do not see checkboxes for some (or any) logs in the **Edit** column, you do not have sufficient permissions to take any action on those logs.

The following commands are always available at the bottom of the page.

- *Edit* - transfers the selected logs to the Log Time page for editing.
- *Delete* - deletes selected logs from the system.

The following commands are available if your administrator has enabled Time Approval. Please see that chapter for more details.

- *Approve* - approves selected logs.
- *Decline* - declines selected logs. You will be prompted for a reason that you are declining the logs, which will be communicated to the user who originally submitted them.
- *Mark unreviewed* - marks selected logs as not having been reviewed.

The following commands are available if your administrator has enabled Marking Logs as Billed in Billing Options. Please see that section for more details.


- *Mark as Billed* - marks the selected logs as having been billed on the current date. This option lets you selectively mark individual logs rather than marking all logs that appear on a particular Time Log report.
- *Unmark as Billed* - removes billing information from logs previously marked as billed, either through the Time Log report or individually from this page.



Note

Even though you are able to select logs and click the command buttons to act on them TimeTiger may still only act on some (or none) of the logs you have selected depending on the permissions available to you. You will be informed when some of the logs you selected were not acted upon.

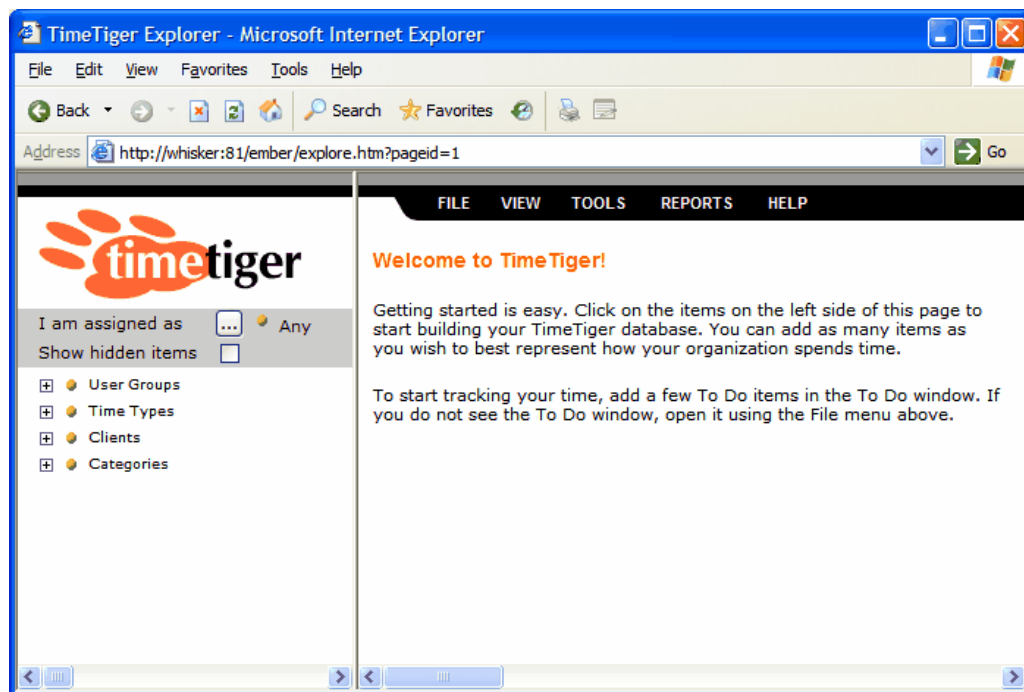
Chapter 7. Explorer

The TimeTiger Explorer is the main tool for TimeTiger administration, reporting and analysis. The Explorer appears when you log into TimeTiger and can also be opened by clicking the  button from the To Do page.

Explorer Overview

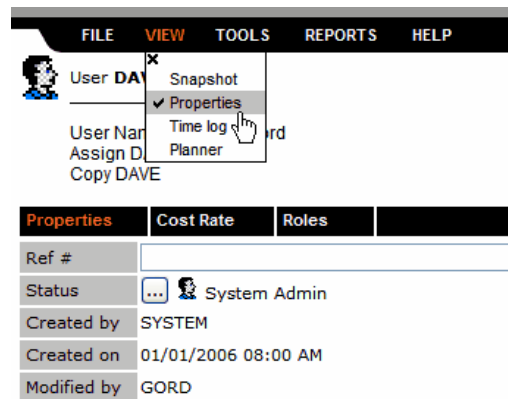
The TimeTiger Explorer is divided into two main areas. An item list appears on the left side of the page, showing all items that you have sufficient permissions to see. The right side of the Explorer shows different pages depending on what you are doing with TimeTiger and which View you have selected.

Figure 7.1. TimeTiger Explorer



Views

You can select different Views of your information from the TimeTiger View menu. If you are finished with the page you see on the right side of the Explorer and would like to get back to the default Properties view, choose **Properties** from the **View** menu. The following Views are available.

Figure 7.2. Choosing a View in the Explorer**Table 7.1. Explorer views**

View	Description
Snapshot	Shows a summary of the schedule, cost, and work status of a particular Project or Task. You can only see the Snapshot if you have selected a Project or Task from the left-side tree.
Properties	Displays and allows you to edit the item you have selected in the left-side tree, as well as create, delete, copy, and move items.
Planner	Shows the Project or Task in a GANTT view and allows you to see when work was planned and actually performed.
View Time Logs	Shows the time logged to the item you have selected in the left-side tree, and lets you select specific time log entries to edit.

**Note**


If multiple languages are enabled for your application you can swap between them using the View menu. TimeTiger remembers your last language selection for your next login.

Item List

The left side of the Explorer page shows a list of the items in the TimeTiger database. You will only see items that you have permissions to see and choose (see Role-based Security). Also, an administrator may have marked an item with a status code that hides it from lists (see Status Codes). If you do not see an item you expect to be in this list contact your TimeTiger administrator or project manager.

You can filter this list to show only items to which you are assigned in a particular role. For example, if you only wish to see items to which you are assigned as a Project Manager, select Project Manager from the **I am assigned as** dropdown. Choose Self to only show yourself in the Explorer item list.

Some items may have been marked with a status code that hides them from lists by default. You can still show these hidden items by clicking the **Show hidden items** checkbox at the top of the item list.

Select an item in the list by clicking on it. You can also expand the list to see the sub-items underneath an item by clicking the  button. When you select an item the information displayed on the right side of the Explorer will change depending on the View you have chosen. For more information, see Explorer Views.

Explorer Menus

The Explorer menu bar is the black bar at the top of the right side of the Explorer page. The following menu selections are available.

Table 7.2. File Menu

Menu option	Description
To Do Window...	Opens the To Do page.
Log Time...	Opens the Log Time page so that you can record time entries in the database.
Exit and Log Out	Logs you out of the TimeTiger system. You can also simply close all TimeTiger windows on your desktop.

Table 7.3. View Menu

Menu option	Description
See Explorer Views.	See Explorer Views.

Table 7.4. Tools Menu

Menu option	Description
Move To Do window on screen	If you <i>lose</i> the To Do page (you have opened it but cannot see it on your screen), use this option to bring it back into your screen area. If the To Do window appears in your Windows task bar close it first by right-clicking and choosing Close .
Customize status codes...	Allows you to create and customize the Status Codes available on the Properties view of all the different items in TimeTiger.
Create/edit security roles...	Allows you to create and customize the security roles available for assignments. See Role-based Security.
Set default security roles...	Default security roles let you grant certain permissions to all your users without needing to make specific assignments. For example, if you want all users to have access to all Categories you can set up a default security role. See Default Roles.
Options	Opens the Options page for configuring the TimeTiger system for your organization.
Service & Maintenance	A special page that you should not use unless specifically asked to do so by Indigo Technical Support. This page is used for advanced diagnostics and database customizations.

Table 7.5. Reports Menu

Menu option	Description
Create new report...	Allows you to create a customized analysis report that shows your time information in a flexible grid where you can decide what goes down the side and what goes across the top of the grid. See Custom Reports.
Edit AutoMail schedule...	Allows you to view and edit existing report schedules that you have set up. This option is only available if AutoMail has been enabled for your application by your system administrator. See AutoMail Overview.

Menu option	Description
Time Log	Lists the details of the time logged to all or a specific item in the system.
Timesheet	Shows time logged by a user or to an item or group of items, broken out in a convenient weekly or monthly view.
Item List	Lists the properties of items in the system.
Time to Review	Shows all users that are allowed to review time in the system and the number of unreviewed or declined logs that they could approve.
Missing Time	Shows all users that have not logged sufficient time (as defined by you) within a certain period and can also send an automated email reminder to those users.
<i>Custom reports</i>	The full list of custom reports that you have the ability to generate or edit appears below the list of standard reports.

Explorer Tips

You can have more than one TimeTiger Explorer window open at a time. For example, you could use one window to make changes to TimeTiger items and another to generate reports. To create another Explorer window choose New Window from your Internet browser menu or click the TimeTiger Explorer button from the To Do page.

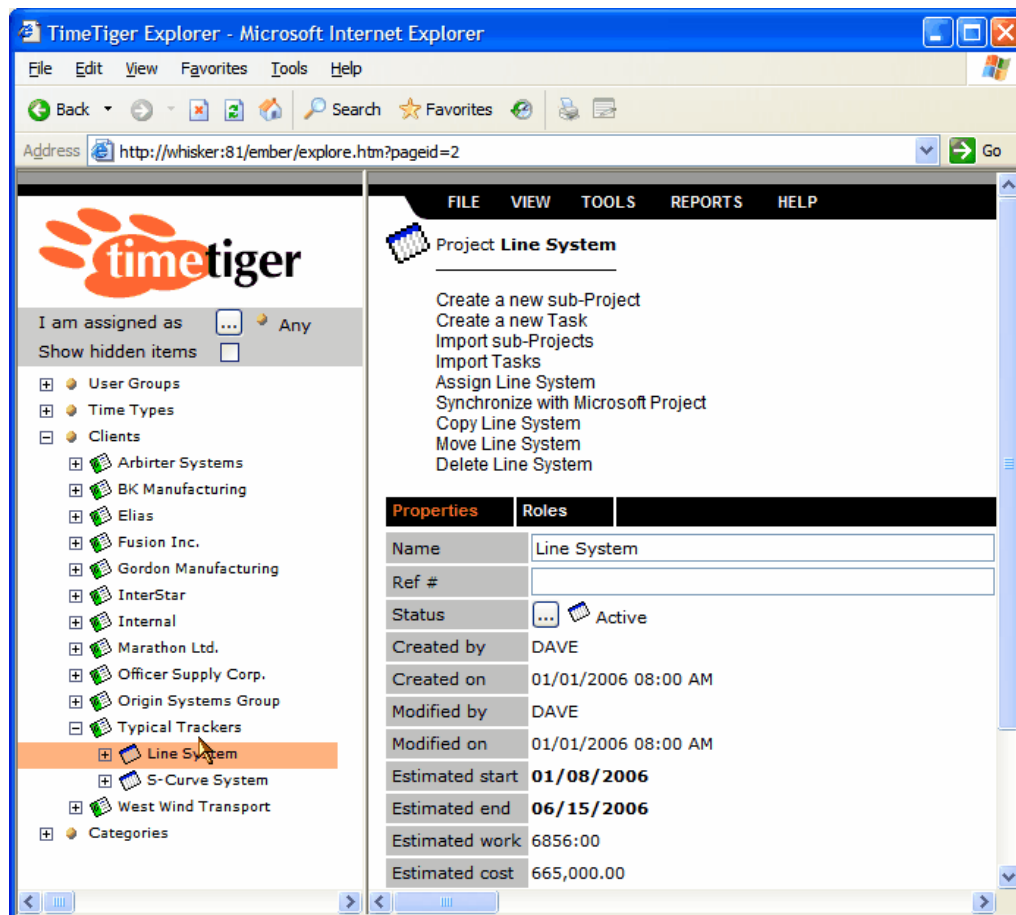
Chapter 8. Properties View

Properties Overview

The Properties View is the default view of the TimeTiger Explorer. It is divided into two sections. The top section displays the type and name of the item currently selected in the Explorer left-side tree, and lists the various operations you are able to perform on the item. The bottom section lists the various pieces of information stored about the item. This information may be split among several different "tabs", arranged horizontally directly above the actual fields themselves. Click on the tab to see the fields that belong to it.

The commands and tabs that you will see for each item depend on the type of item and your permissions in the system. Information that you are authorized to view but not edit will be presented in a read-only fashion on the page. Some information that appears for an item in this view is calculated based on its sub-items and can therefore not be edited.

Figure 8.1. Properties View

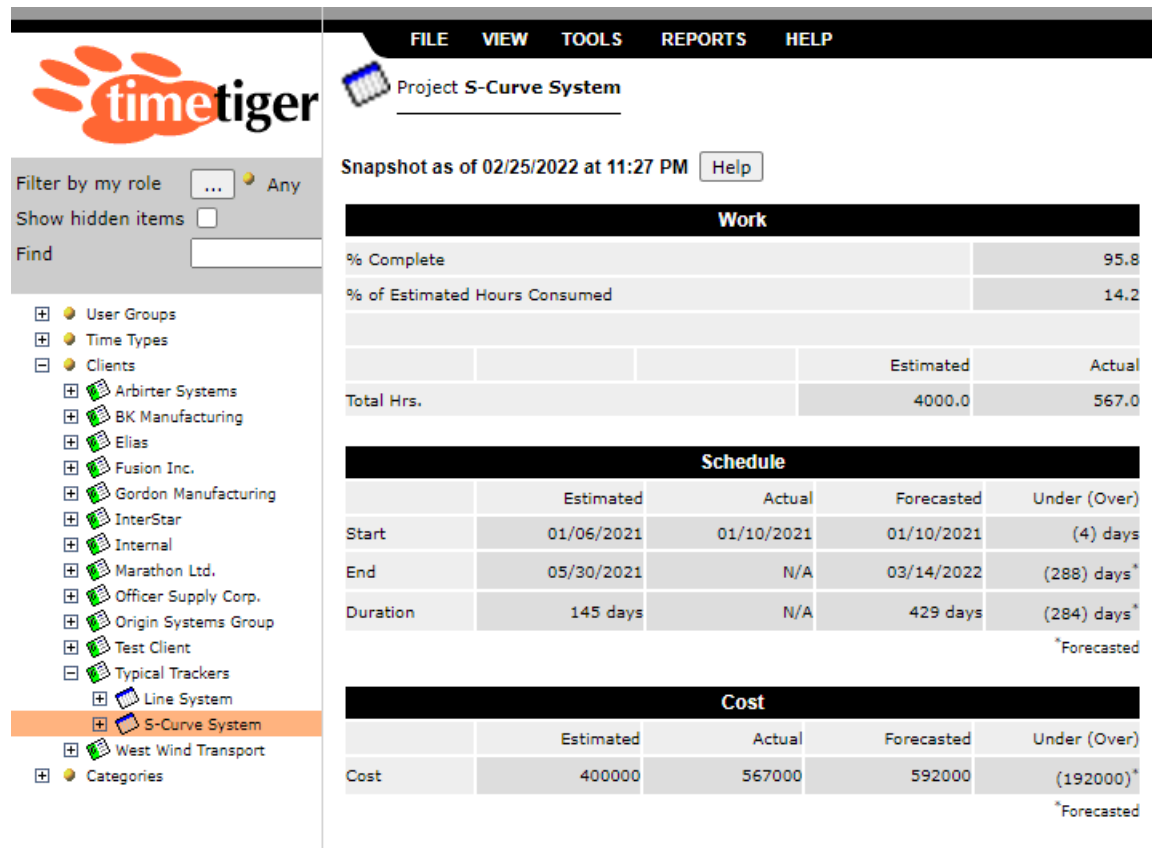


Chapter 9. Snapshot View

Snapshot Overview

Use the Snapshot View to instantly see vital statistics about a selected Project, sub-Project, Task or sub-Task. The view is divided into sections for *Work*, *Schedule*, and *Cost*.

Figure 9.1. Snapshot View



Snapshot Work

% Complete - the percentage of the item's Estimated Work that is complete, based on the % Complete estimates logged by the individuals recording time against this item.



Note

Turn on the *Show % Complete* setting in *Chapter 17, Options* so that users can estimate % complete for each item as they make time log entries. For items that do not yet have any time logs recorded, you can manually enter a % complete estimate in the *Chapter 8, Properties View* for that item.

% Estimated Hours Consumed - the proportion of the item's Estimated Work that has been consumed based on the actual time logged for the item. This value will display zero if there is no Estimated Work for the item.

Estimated Total Hrs. - the number of hours estimated for the item. This is the Estimated Work value on the Properties page for the item, and sums up the Estimated Work for any sub-items.

Actual Total Hrs. - the number of hours actually logged against the item. It is the sum of all the hours submitted in time logs for the item.

Snapshot Schedule

Estimated - the Estimated Start and End dates for the item, as entered in the *Chapter 8, Properties View* for that item. If the item has sub-items, this is the summarized Estimated Start and End dates for all the sub-items. The *Duration* is the number of days between the Start and End dates.

Actual - the dates of the first and last time logs made for the item. The Actual End date is not available until the item reaches 100% complete, as recorded in the time log entry.

Forecasted - for items that have an Estimated Start and End date, and have at least some log entries with a % complete estimate, TimeTiger is able to extrapolate and provide a forecasted completion date based on the current rate of progress. The forecast naturally improves as more log entries are recorded and the % complete continues to climb upwards.

Under (Over) - how the actual (or forecasted, if the item is not yet at 100% complete) Start, End, and Duration compare to their original estimates.



Note

If you see that the item is falling behind schedule you can take corrective action or simply *adjust the Estimated Start and End date*. TimeTiger works best when each Estimated Start, End, Work and Cost value represents the current reality of your Projects and Tasks. Don't hesitate to change these values when the underlying reality changes. That will provide TimeTiger, and your people, the best possible information for adapting and accomplishing the plan.

Snapshot Cost

Estimated - the Estimated Cost for the item as entered in *Chapter 8, Properties View*. If the item has sub-items, this is the sum of the Estimated Costs of all the sub-items.

Actual - the total cost of all time logs made to date for this item and all sub-items. This value is available regardless of the % complete estimate for the item.

Forecasted - for items that have an Estimated Cost and have at least some log entries with a % complete estimate, TimeTiger is able to extrapolate your cost to date and provide a forecasted cost at completion based on the current rate of progress. The forecast naturally improves as more log entries are recorded and the % complete continues to climb upwards. When the item becomes 100% complete the Forecasted Cost will be equal to the Actual Cost.

Under (Over) - how the Actual (or Forecasted, if the item is not yet at 100% complete) Cost compares to the Estimated Cost.

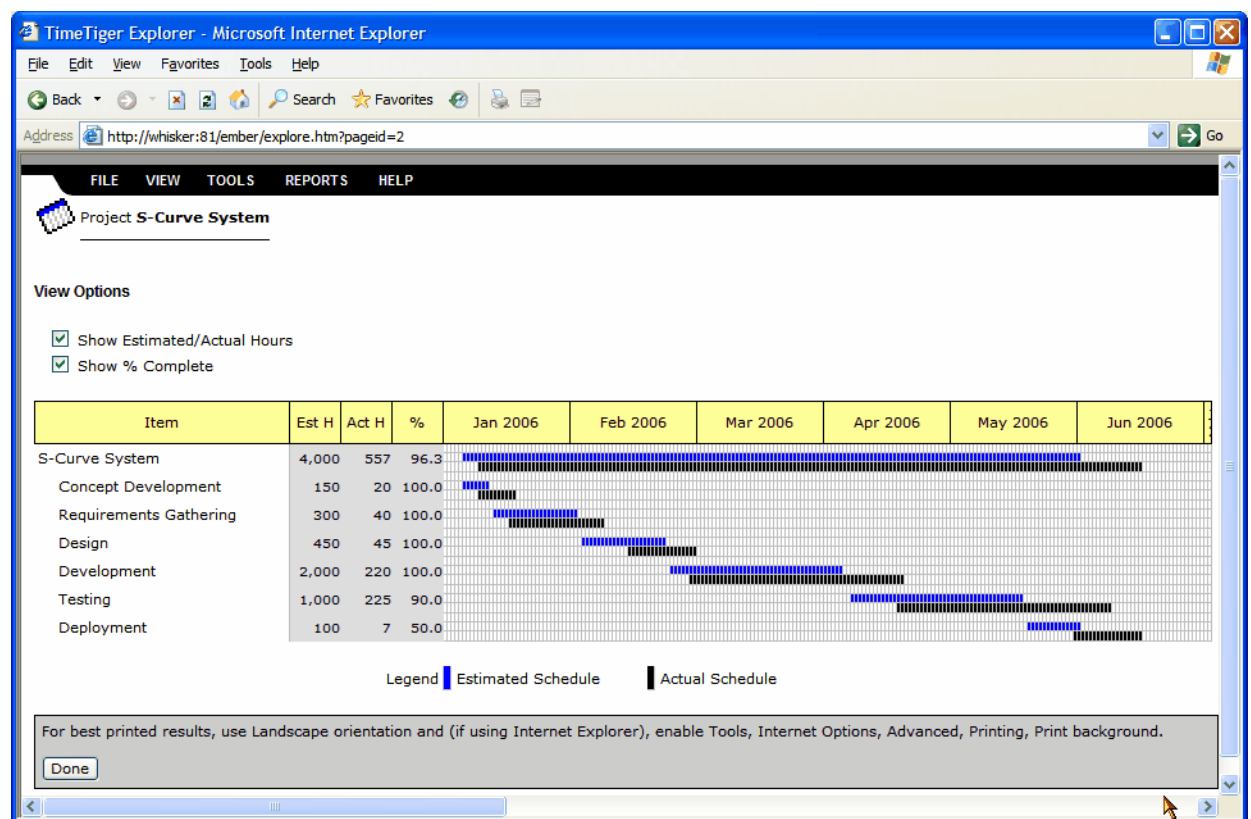
Chapter 10. Planner View

Planner Overview

The Planner View provides you with an instant GANTT-style view of the item selected in the Explorer left-side tree. You must select either a Project or Task, but you can select a Task at any level of a Project structure.

The Planner View shows a blue bar representing the estimated schedule (Estimated Start and Estimated End dates) for the each line item. A black bar shows the range within which time logs were actually made in TimeTiger. At a glance you can see when work was done relative to when it was planned.


Figure 10.1. Planner View



You have the option to include Estimated Hours and Actual Hours, and % Complete for each line item. Click on the appropriate checkbox at the top of the page to refresh the display.

Your Project (or Task) timeline is automatically scaled to fit within the Planner View. This means that shorter projects will naturally appear more "zoomed-in" than longer projects. You will always see your entire project (from the first day that work was scheduled or performed through the last day that work was either scheduled or performed) in the Planner View.

If you wish to Print the Planner View, follow the directions that appear at the bottom near the **Done** button.

Click the **Done** button to return to the TimeTiger Explorer. Simply closing the Planner View will require you to re-open the Explorer by logging into TimeTiger again or clicking the  button on the To Do page.

Chapter 11. Status Codes

Status Code Overview

Every User, Client, Project, Task, and other item in TimeTiger has a *Status*, such as *Active* or *Inactive*. This Status determines how TimeTiger treats this item in displays and on reports. You can change the way each status code behaves for each type of item, and even create your own status codes.

If you have sufficient permissions, you can set the Status for a particular item in the Explorer Properties View.

Built-in Status Codes

When you first install TimeTiger the following status codes are available for each type of item.



Note

Some of these items may actually not be in your TimeTiger database at all, depending on the choices you made when creating your database.

Table 11.1. Built-in status codes: User Group, Time Type, Client, Project, and Category

Status Code	Description
Active	The icon for the item is displayed in full colour. New logs can be made for the item and existing logs can be edited.
Inactive	The icon for the item is displayed in a grayed out fashion. New logs cannot be made for the item (but existing logs can be edited).

Table 11.2. Built-in status codes: Task

Status Code	Description
Active	The icon for the Task is displayed in full colour. New logs can be made for the Task and existing logs can be edited. The Task is included when synchronizing with Microsoft Project files (see Microsoft Project Sync).
Inactive	The icon for the Task is displayed in a grayed out fashion. New logs cannot be made for the Task (but existing logs can be edited). This Task is excluded from synchronization with Microsoft Project files.

Table 11.3. Built-in status codes: User

Status Code	Description
Active	The icon for the User is displayed in full colour. New logs can be made for the User and existing logs can be edited. The User is able to log into TimeTiger.
Inactive	The icon for the User is displayed in a grayed out fashion. New logs cannot be made for the User (but existing logs can be edited). The User is not able to log into TimeTiger.

Status Code	Description
System Admin	This special status (which can be renamed but not removed from TimeTiger) confers special rights to the User. The User is automatically granted all permissions on all items in the system and is able to perform all administrative and control functions in TimeTiger.



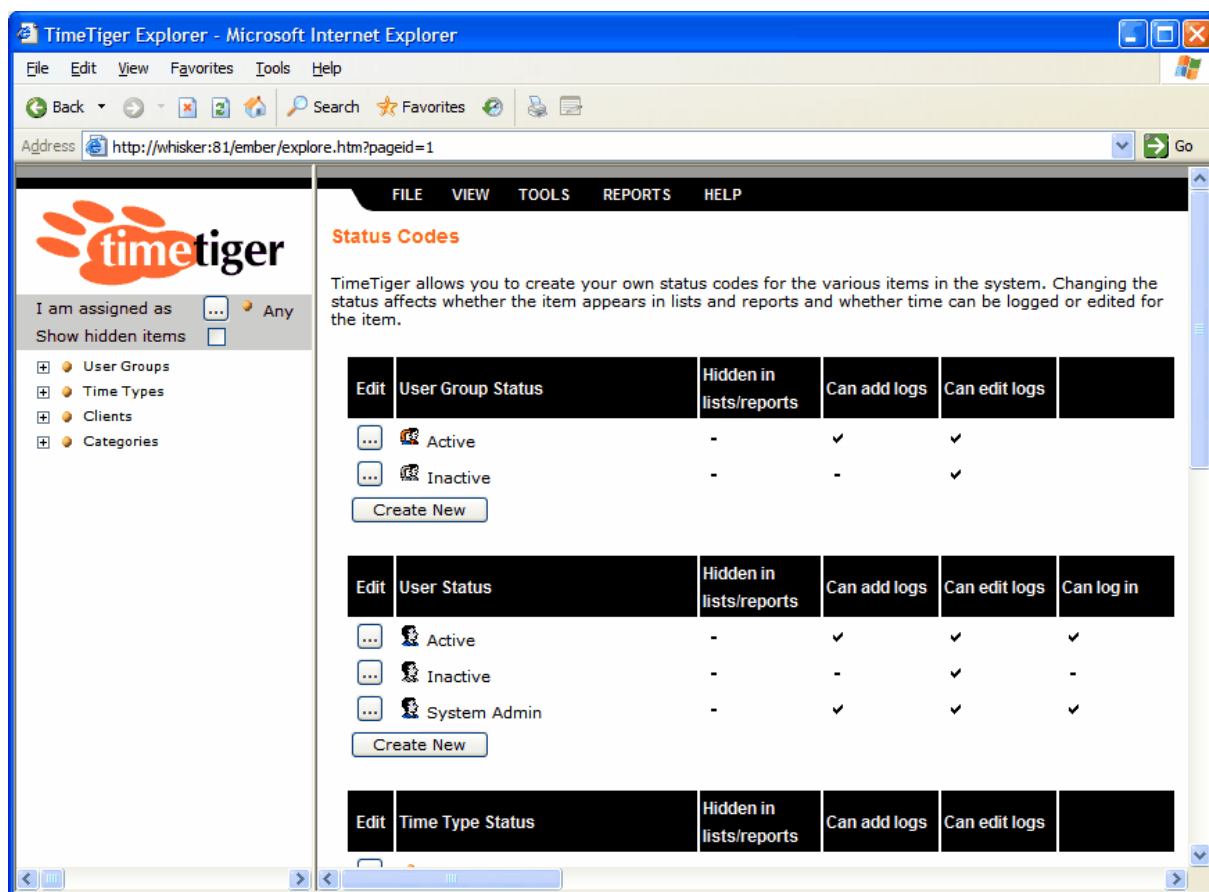
Note

Users set to a status that prevents new logs from being added and prevents them from logging into the system do not count towards your license allocation. So, Inactive Users (by default) do not count towards your total license usage. It is a good idea to set old Users to status Inactive (rather than deleting them entirely) so that their time logs are preserved for future analysis. Deleting a User will delete all logs that they have made.

Customizing status codes

You can change the name and behaviour of the built in status codes (except for the System Admin status) and create your own status codes from scratch from the Explorer Tools menu.

Figure 11.1. Customize Status Codes




The Customize Status Codes page lists the available status codes for each item type in TimeTiger. Click the  button beside the status code you wish to edit or click **Create New** to create a new status code. You will be able to name your status code and select the behaviours you want to confer onto items that are set to this status.

Figure 11.2. Modifying behaviour for Inactive Users

The screenshot shows the TimeTiger Explorer web application running in Microsoft Internet Explorer. The browser's address bar displays the URL `http://whisker:81/ember/explore.htm?pageid=1`. The application's interface includes a sidebar on the left with the TimeTiger logo and navigation links for 'User Groups', 'Time Types', 'Clients', and 'Categories'. The main content area is titled 'Edit Status Code' and contains a form for configuring the 'Inactive' status code. The form includes fields for the status code in English ('Inactive') and French ('Inactif'), and several checkboxes for defining its behavior. The 'Icon is "grayed out"' checkbox is checked, while 'Hidden in lists and reports by default', 'New logs can be made for item', and 'Can log in to TimeTiger' are unchecked. The 'Existing logs for item can be edited' checkbox is also checked. At the bottom of the form are three buttons: 'Submit changes', 'Delete', and 'Cancel'.

Edit Status Code	
Set the name and characteristics of this status code. Items that are assigned this status will behave in the way you indicate below.	
Status Code (English)	Inactive
Status Code (Français)	Inactif
Hidden in lists and reports by default	<input type="checkbox"/>
Icon is "grayed out" (🔒)	<input checked="" type="checkbox"/>
New logs can be made for item	<input type="checkbox"/>
Existing logs for item can be edited	<input checked="" type="checkbox"/>
Can log in to TimeTiger	<input type="checkbox"/>
<input type="button" value="Submit changes"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/>	

**Note**

Only users with status *System Admin* can customize status codes.

Chapter 12. Role-based Security

Role-based Security Overview

As a TimeTiger administrator you have full control over what your Users can see and do in the TimeTiger system. You can specify which items (Clients, Projects, Tasks, etc.) Users can log time to, modify, or even see in the TimeTiger Explorer. You control what information appears in reports for each User, and you can even allow a User to log time on behalf of another User. This is accomplished through Role-Based Security.

In Role-Based Security, you (as a TimeTiger administrator) assign a *User* to an *Item* in a particular *Role*. You can assign any *User* to any *Item* in any *Role*.

An *Item* is a Client, Project, Task, Category, User Group, or even another User. The items on your system may have different names if you or another system administrator has renamed them.

A *Role* is simply a list of permissions. These permissions are granted to any User assigned in that role. You can create your own roles and name them. For example, you may have a *Project Participant* role that includes permissions to log time. Any User assigned to a Project or Task in the *Project Participant* role will be able to log time to that Project or Task. You may also have a *Project Manager* role, that has permissions to create, edit and delete Tasks and sub-Tasks. Any User assigned to a Project in the *Project Manager* role will be able to manage the list of Tasks for that Project.

You can assign a User to as many items as you wish in as many roles as you wish. You can assign a User to the same item in several different roles, in which case they are granted all the permissions of all the roles in which they are assigned.

Rather than assigning individual Users to an item in a particular role, you can assign a User Group to the item. If a User Group is assigned to an item in a particular role, every User in that User Group is considered assigned to that item in that role.

Assigning a User to an item in a particular role automatically assigns that User to all sub-items in the same role. So, if you assign a User to a Project as a *Supervisor*, that User is considered to be assigned as a *Supervisor* to all the Tasks and sub-Tasks of that Project. This way, if any Tasks or sub-Tasks are added to the Project at a later time, the user will already be considered assigned to the new Tasks and sub-Tasks without any additional work required on your part as the administrator.

Assigning a User to an item in *any* role also automatically grants that user permissions to see all *parent* items of of that item.

Keeping this in mind, you can assign users to the items that most accurately model the actual responsibility structure at your organization and can be confident that the user will be able to see and work on related items that they need.

Role Permissions

A role can include any combination of the following permissions:

Table 12.1. Role Permissions

Permission	Description
CAN SEE	User/Group sees this Item in lists.

Permission	Description
CAN SEE PROPERTIES	User/Group can see and report on regular properties for the Item.
CAN EDIT PROPERTIES	User/Group can edit regular properties for the Item.
CAN SEE RESTRICTED PROPERTIES	User/Group can see and report on restricted properties for the Item. Implies CAN SEE PROPERTIES. See Restricted Properties, below.
CAN EDIT RESTRICTED PROPERTIES	User/Group can edit restricted properties for the Item. Implies CAN EDIT PROPERTIES. See Restricted Properties, below.
CAN LOG	User/Group can log time to this item. Since a number of items are included in each time log, the User/Group must have the CAN LOG permission on every item in the time log in order to create the log.
CAN SEE OWN LOGS	User/Group can see and report on logs for the Item that are logged in their name or that they made.
CAN EDIT OWN LOGS	User/Group can edit/delete logs for the Item that are logged in their name or that they made.
CAN SEE ALL LOGS	User/Group can see all logs for the Item. Implies CAN SEE OWN LOGS.
CAN EDIT ALL LOGS	User/Group can edit/delete all logs for the Item. Implies CAN EDIT OWN LOGS.
CAN SEE RESTRICTED LOG PROPERTIES	User/Group can see restricted properties, such as costs, of time logs for the Item. This permission is required in order to generate financial (cost) reports for the Item.
CAN ADD CHILD	User/Group can create a new child Item under this Item.
CAN DELETE	User/Group can delete this Item.
CAN MOVE	User/Group can move this Item underneath any item that they are able to create a child item for.
CAN ASSIGN TO	User/Group can assign other Users/Groups to this Item.
IS RESPONSIBLE	User/Group is considered to be responsible for doing work on this item. Does not actually restrict what the user can do, but is used to identify Users who are actually expected to log some time to the item. Used for capacity planning and Microsoft Project integration purposes. See The IS RESPONSIBLE Permission.
CAN APPROVE OWN LOGS	User/Group can review and approve their own logs made for this item. Effectively, this means that logs are automatically approved when entered by this User/Group. Only available if your database has been set up for Time Approval.
CAN APPROVE OTHERS LOGS	User/Group can review and approve logs made by others, but not themselves, for this item. Typically granted to a supervisor or project manager. If you would like this User/Group's time logged for this item to be automatically approved, also grant the CAN APPROVE OWN LOGS permission. Only available if your database has been set up for Time Approval.
CAN CHANGE PASSWORD	User/Group can change the password of this Item. Only applies when assigned to a User/Group. Generally this permission is included only in the Self role (so

Permission	Description
	that users can change their own passwords and system administrators can reset passwords when necessary).
CAN PROXY	User/Group can create logs on behalf of this item. Only applies when assigned to a User/Group. Implies CAN LOG and CAN SEE.
CAN ASSIGN	User/Group can assign this Item to others. Only applies when assigned to a User/Group.

Restricted Properties

TimeTiger distinguishes between Regular and Restricted properties to give you control over who can see and edit certain sensitive item properties. You may want to prevent some Users from seeing cost budget and performance information, for example, so you can set the Estimated Cost field as restricted and only assign appropriate Users to roles that allow them to See and Edit Restricted Properties.

By default, TimeTiger only considers User cost rate information and actual time log costs as restricted. In order to mark additional fields (such as Estimated Cost) as restricted, please send a request to support@indigo1.com and we will provide instructions for doing so.

TimeTiger will not show the Snapshot view if the User is not allowed to see Restricted properties on that item. Also, TimeTiger will not show values in the Cost of Time column on reports for items on which the User does not have the SEE RESTRICTED PROPERTIES permission.

The Self Role

A User is always assigned to themselves in the Self role. You cannot change or remove this assignment, but you can control the permissions granted to the Self role. In this way, you can allow (or prevent) Users from seeing and modifying their own Properties information, for example.

The Self role cannot be removed from the TimeTiger system.

Default Roles

Role-Based Security gives you very fine-grained control over who can see and do what on your TimeTiger system. What if you do not need this level of control for some types of items? For example, what if you want to automatically give all your users certain permissions on all Categories? Rather than manually assigning all your users to each Category, you can use Default Roles.

To use a Default Role, simply create a role, give it a name like *Everyone* and set it as the Default Role for a type of item (Category, for example). Now, every User in TimeTiger will automatically be granted the permissions of the *Everyone* role to every Category in your system. These permissions will be granted in addition to any permission granted by the other roles in which they are assigned to that Category.

Each type of item can have its own Default Role, but you do not need to create a Default Role for an item type at all. In this way you can grant general permissions on Categories to everyone, but limit permissions on Projects and Tasks to only those users assigned in a specific role.

You create Default Roles just like any other role. Simply assign them as the Default Role for a particular type of item in the Explorer *Set default security roles* page.

The IS RESPONSIBLE Permission

Unlike the other permissions you can include in a role, the IS RESPONSIBLE permission does not allow the User to *do* anything. Rather, it is an indication to TimeTiger that the assigned User is, at least partially, responsible for doing work on the item.

When TimeTiger knows who is responsible for each item it is possible to generate capacity planning reports and include resource information when synchronizing with Microsoft Project. Several different Users should be assigned to a particular item in roles with the IS RESPONSIBLE permission when several people are in fact responsible for doing work on it.

System Admins

TimeTiger System Admins are TimeTiger Users that have a status of *System Admin* (rather than Active or Inactive, for example). System Admins always have full permissions (except the IS RESPONSIBLE permission) on every item in the system, regardless of whether they are assigned to those items in any role.

You may still assign System Admins to items in a particular role and may wish to do so in order to grant them the IS RESPONSIBLE permission, but System Admins will always have all other permissions on all items.

Items that Require Explicit Role Assignment

TimeTiger makes it convenient to assign a User or Group to a large number of Clients, Projects or Tasks at once. For example, assigning a user to a Client will automatically assign that user to all the Projects that belong to the Client and all Tasks under those Projects. But what if a particular Task should be exempted from that cascading assignment? What if one specific Task (or a Project and all its Tasks) should only be available to a User that has been explicitly assigned to that particular Task (or Project)?

Individual items can be excepted from inheriting role assignments from parent items (and from Default Roles) by checking the *Requires explicit role assignment* checkbox on their Properties page in the TimeTiger Explorer. Now, you can explicitly assign those items to just those Users who need access to them. Other Users will not be automatically assigned to checked items even if they are assigned to parent items and Default Roles do not apply.

System Admin users still have full access to items marked with *Requires explicit role assignment*.

Examples: Role-based Security in Action

The following scenarios illustrate some common security challenges and how they are addressed with Role-based Security. Rather than detailing the complete Role-based Security setup for each scenario, the elements of the setup specific to the scenario are described. Your Role-based Security configuration may incorporate elements from several of these examples.

Example 1

A smaller organization where everyone works on everything, but only system administrators can create new items and make changes to items in the system.

A single role is created, *Everyone* with the following permissions:

- CAN SEE

- CAN LOG
- CAN SEE PROPERTIES
- CAN SEE OWN LOGS
- CAN EDIT OWN LOGS

This *Everyone* role is set as the Default Role for Clients, Projects, Tasks, Categories, User Groups and Users.

This is similar to the security setup of TimeTiger 1.8.

Example 2

A larger organization that organizes work into Projects. Individual Users are assigned to work on specific Tasks within Projects, and each Project has one or more Project Managers that are responsible for assigning work and maintaining the information for the Project and its Tasks.

Two roles are created, *Project Participant* and *Project Manager*. The *Project Participant* role has the following permissions:

- CAN SEE
- CAN LOG
- CAN SEE PROPERTIES
- CAN EDIT PROPERTIES
- CAN SEE OWN LOGS
- CAN EDIT OWN LOGS
- IS RESPONSIBLE

The Project Manager role has the following permissions:

- CAN SEE
- CAN SEE RESTRICTED PROPERTIES
- CAN EDIT RESTRICTED PROPERTIES
- CAN SEE ALL LOGS
- CAN EDIT ALL LOGS
- CAN ASSIGN
- CAN ASSIGN TO
- CAN DELETE
- CAN ADD CHILD
- CAN MOVE

Now Users can be assigned to specific Tasks in the *Project Participant* role and they will be allowed to create logs against those Tasks. Users assigned in the *Project Manager* role to specific Projects will be able to make changes to the Project or its Tasks, create sub-tasks, review time logs made etc.

If a *Project Manager* will also be working on a Task in their Project, they should be assigned to that Task in both the *Project Manager* and *Project Participant* role. By adding the *Project Participant* role (which has the IS RESPONSIBLE permission), you are indicating to TimeTiger that they are responsible for actually doing at least some of the work on that Task.

Example 3

An organization employs the services of several outside contractors, whose time is logged into TimeTiger by an administrative assistant at the firm.

Each contractor is added as a TimeTiger User in the User Group *Contractors*.

A role, *Admin Assistant*, is created with the following permissions:

- CAN SEE
- CAN LOG
- CAN PROXY
- CAN SEE ALL LOGS
- CAN EDIT ALL LOGS

The individual responsible for doing the time logging is assigned to the User Group *Contractors* in the role *Admin Assistant*.

Example 4

An organization is structured into several User Groups, with a manager in each. That manager is responsible for reviewing and approving all time made by Users in that Group. But that manager's own time is reviewed and approved by a Vice-President in a separate Executives User Group.

Log Approval is first enabled on the TimeTiger Options page. Then, a role, *Manager*, is created with the following permissions:

- CAN SEE
- CAN SEE ALL LOGS
- CAN EDIT ALL LOGS
- CAN APPROVE OTHERS LOGS

Each of the Group Managers is assigned to their own group in this Manager role. They can now approve the time for the other Users in that Group.

The Vice-President is assigned to each of the Group Managers in this Manager role. Now, the Vice-President can approve the time entered by each of the Group Managers.

But who can approve the Vice-President's time? Some organizations might wish the President to do so (in which case the President would be assigned to the Vice-President in the Manager role), and in other cases the Vice-President's time might be automatically approved.

To enable this automatic approval, create an Executive Manager role with the same permissions as the Manager role with the additional permission *CAN APPROVE OWN LOGS*. Assign the Vice-President to herself in this role. Now, her time will be automatically approved as soon as it is entered.

Chapter 13. Time Approval

Approval Overview

TimeTiger incorporates an optional Time Approval workflow, giving your managers and supervisors the opportunity to review and approve each time log entered by your users prior to displaying them on reports or including them in calculations. You can, for example, review and approve logs before monthly invoicing, or every week prior to running weekly status reports. This additional level of verification can help ensure that all data entered into TimeTiger is complete and correct.

TimeTiger keeps a record of the approval status of each log (*Approved*, *Declined*, or *Not Reviewed*) and maintains additional detail on who approved or declined the log and why it was declined.

Enabling Time Approval

Upon installation Time Approval is disabled in TimeTiger. A System Admin can enable it on the Options page. Enabling or disabling Time Approval will automatically mark each log in the system as having been approved (i.e. approval details will be reset).

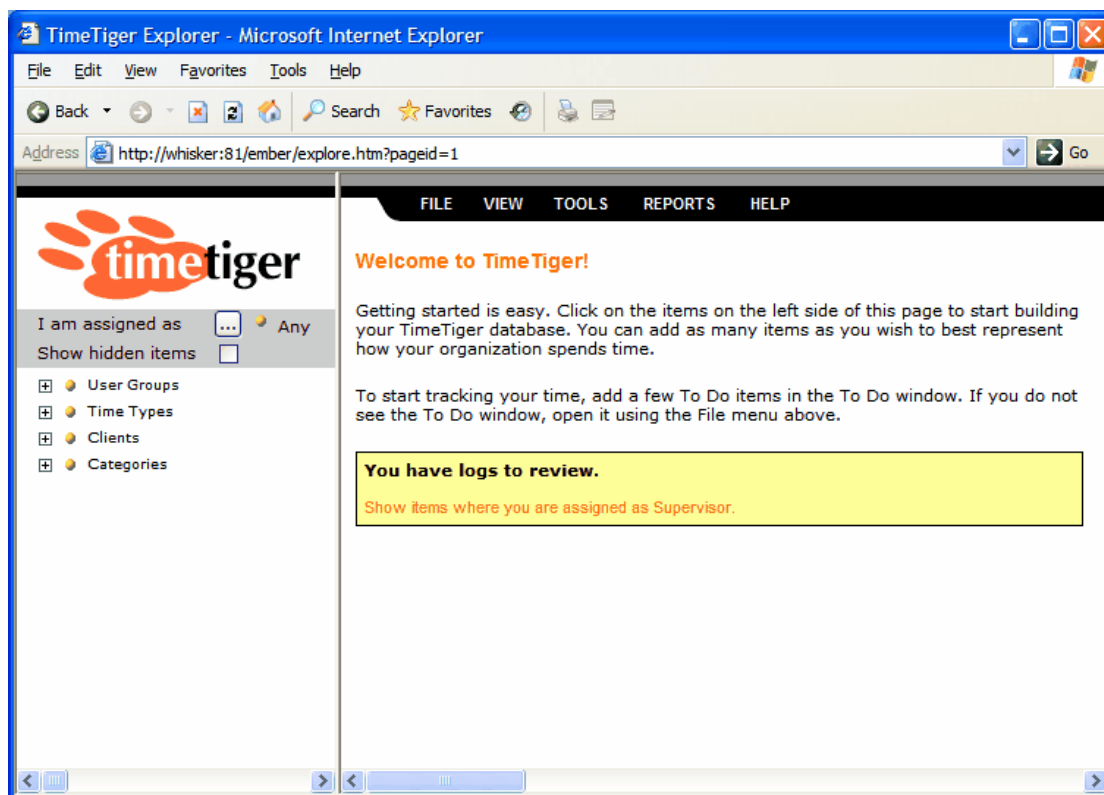
Give some thought to who will be approving time for each of your items. You can give a particular user the right to approve logs on any item in TimeTiger (another User, an entire User Group, or a Project, for example) by assigning them to a role that includes the CAN APPROVE permission (see Role-based Security). This gives you the flexibility to assign approvers to multiple different items or assign multiple approvers to the same item (in case one approver is not available and you want to assign a backup).

As soon as you have turned on Time Approval time logs will no longer appear on reports until they have been approved or unless you specifically request Not Reviewed logs when generating the report. Encourage your assigned approvers to regularly approve the logs for which they are responsible in order to keep TimeTiger reports current and accurate.





Approval Workflow

The approval process begins when a user enters logs into the system. If the user is a System Admin or they are assigned in a role which gives them permissions to approve their own logs, the logs they entered are automatically approved and no further action is necessary. If, on the other hand, another user needs to approve their logs that user is notified that they have logs pending review in two ways.

First, when a supervisor logs into TimeTiger and logs are pending review they are presented with a screen similar to the following:

Figure 13.1. Logs pending review

To instantly filter the left-side Explorer tree and show only those items where you are assigned as a supervisor, click the link in the yellow box. Alternately, you can select **Supervisor** from the **I am assigned as** dropdown.

Any user assigned in a supervisory capacity will see additional icons on the left-side Explorer tree if there are logs requiring action. The following example shows a  icon representing Not Reviewed logs for user Jane, and (consequently) also for the Development group. A  icon would indicate that Declined logs are present. Both a  and a  icon indicates that both Not Reviewed and Declined logs are present.

As a supervisor for Jane you would click on her name in the Explorer and change to View Time Logs from the Explorer **View** menu. When Supervisor Approval is enabled several important additions are present in this view.

- *Approval status filter* - you can choose to show Approved, Not Reviewed, or Declined logs, or any combination thereof. If you do not see the logs you expect to see in this view make sure all the boxes are checked.
- *Approval status colour coding* - logs that have been Approved appear with a green background. Logs that have been Declined appear with a light red background. Logs that are Not Reviewed appear with a light gray background.
- *Approval command buttons* - the bottom of the View Time Logs page includes commands that allow you to Approve, Decline, or mark selected logs as Not Reviewed. If you are in a Timesheet view clicking one of these buttons will affect all logs that you see on the timesheet. In Time log (multiple dates) view you must first select the logs you wish to act upon by marking the checkbox to the left of each log.

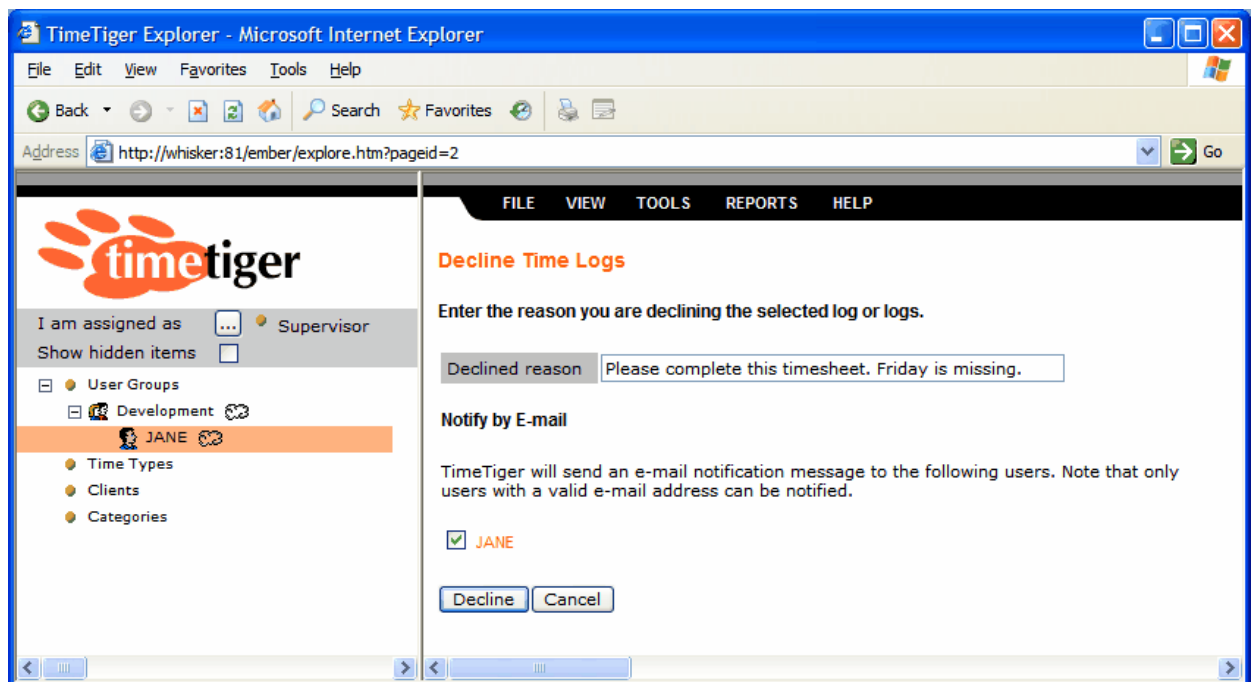
Declining logs

Most of the time the review and approval process will consist of a quick once-over and a click of the **Approve** button. In some cases, however, incomplete or incorrect logs must be corrected or sent back to the person who originally made the entry.

A user with the CAN REVIEW permission can choose to correct the log themselves. They can simply edit the timesheet or log as if they were editing their own time logs. Or they can *Decline* the log to send it back to the person making the entry.

When a supervisor clicks the **Decline** button from the View Time Logs page they are asked to enter a reason why the log or logs are being declined.

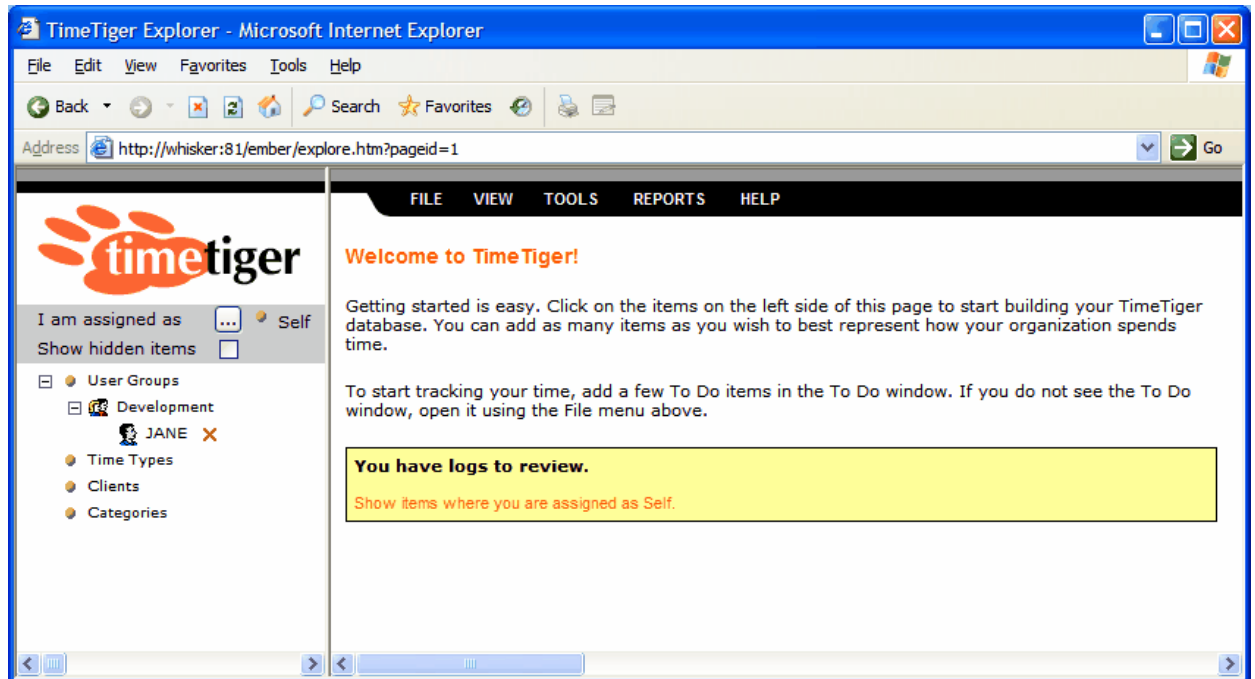
Figure 13.2. Declining logs



Note

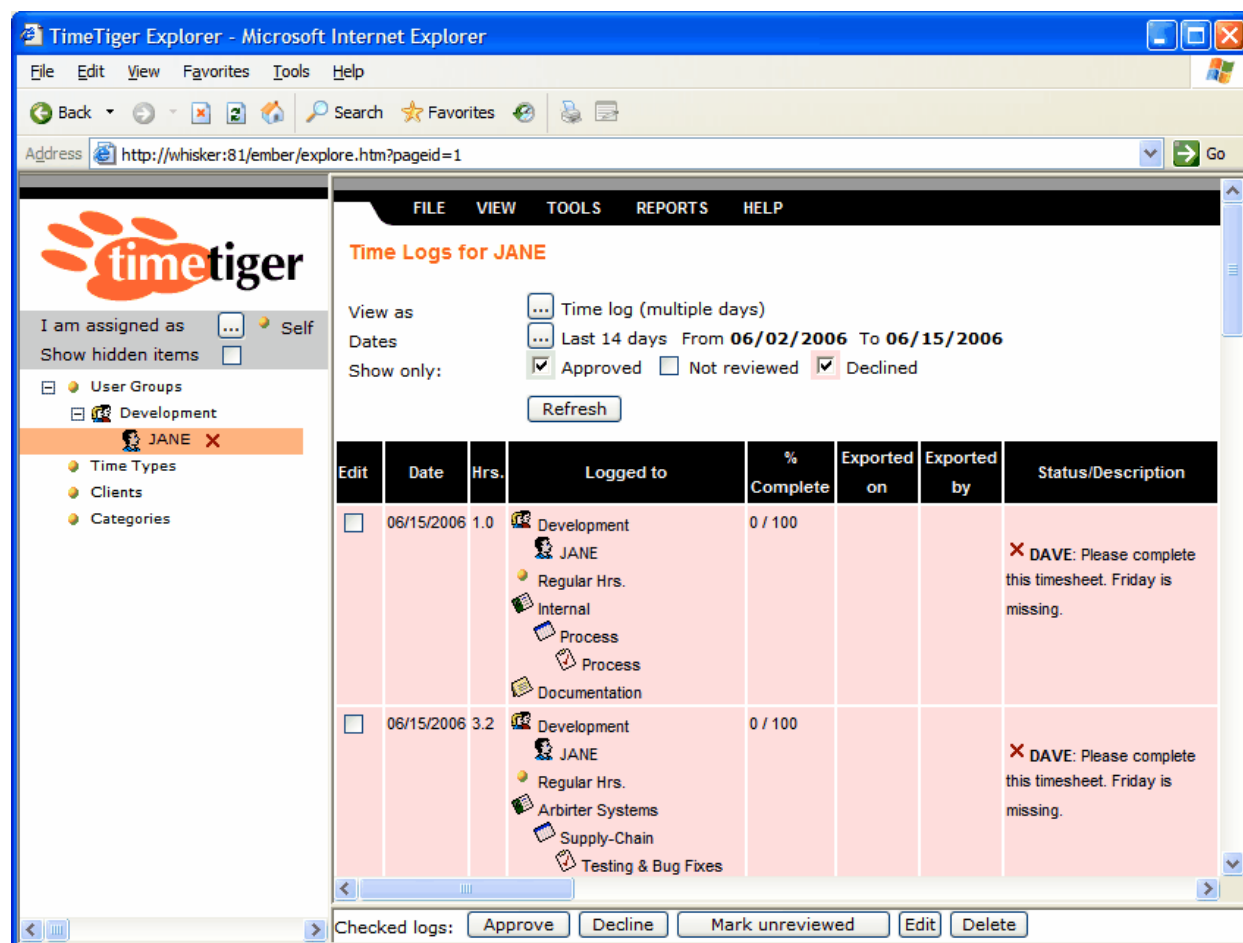
The option to notify the user by email will only appear if the user has a valid email address entered on their Properties page and email integration has been set up by the TimeTiger administrator.

The next time that user logs into TimeTiger they too will receive a notification that they have logs to review. Their Explorer tree will also show their own name as having logs that have been declined.

Figure 13.3. Logging in to see that logs have been declined

To find the declined logs this user should:

- Click on their own name in the Explorer left-side tree.
- Change the Explorer View to View Time Logs.
- Click the checkbox to include **Declined** logs in the view.
- Optionally switch the **View as** dropdown to Time log (multiple dates). This will display the detailed reason why each log was declined as well as the name of the user who declined the log.

Figure 13.4. Reviewing the reason why logs were declined

Making changes to these logs will mark them as Not Reviewed again. The next time the supervisor logs in they will again be notified that they have Not Reviewed logs to examine and the workflow will restart. The reason the logs were originally declined is still available, however, and the supervisor can confirm that the required changes were made by examining their original reason for declining the logs through the View as Time log (multiple dates) option.

Approval Tips

The Time to Review report can quickly show you where Not Reviewed time is "hiding" in the system and will indicate who has been assigned in a role that gives them permissions to approve it.

The Missing Time report is useful in identifying users who have not logged a certain number of hours for the past week (or any time period). If your organization mandates a certain minimum number of hours per week running this report prior to starting the approval process can reduce a supervisor's workload by first pointing out (and optionally notifying) users who still need to enter additional time.

Chapter 14. Standard Reports

Standard Reports Overview

TimeTiger includes several standard reports that allow you to review time logs, list items in the system and even obtain a list of users who have not logged sufficient time for a user-definable period. Even though there are only a few reports in the TimeTiger Reports menu, each report has several configurable settings that give you flexibility in choosing exactly the information you retrieve from the system. TimeTiger also allows you to create your own reports from scratch (See Custom Reports).

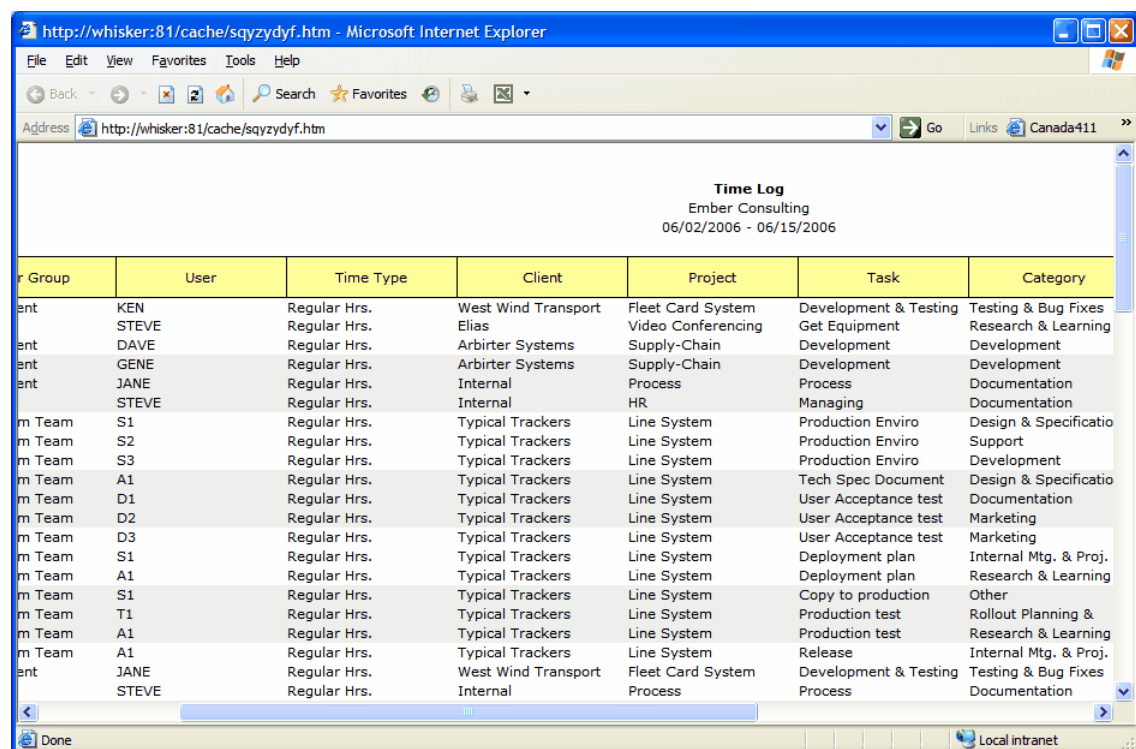
Exporting TimeTiger Reports to Excel

All TimeTiger reports are directly exportable to Microsoft Excel. Rather than clicking the **Generate** button, click **Download** instead. The `report.html` file will be downloaded to your computer. You can open this file directly from from Microsoft Excel's **File** menu.

Time Log Report

The Time Log report lists logs entered into the system. You have a broad range of controls over which logs are included in the report and the order in which they appear. You can also mark logs that appear on this report as having been "billed" and only include unbilled logs on future reports.

Figure 14.1. Time Log Report



User Group	User	Time Type	Client	Project	Task	Category
ent	KEN	Regular Hrs.	West Wind Transport	Fleet Card System	Development & Testing	Testing & Bug Fixes
ent	STEVE	Regular Hrs.	Elias	Video Conferencing	Get Equipment	Research & Learning
ent	DAVE	Regular Hrs.	Arbirter Systems	Supply-Chain	Development	Development
ent	GENE	Regular Hrs.	Arbirter Systems	Supply-Chain	Development	Development
ent	JANE	Regular Hrs.	Internal	Process	Process	Documentation
ent	STEVE	Regular Hrs.	Internal	HR	Managing	Documentation
m Team	S1	Regular Hrs.	Typical Trackers	Line System	Production Enviro	Design & Specificatio
m Team	S2	Regular Hrs.	Typical Trackers	Line System	Production Enviro	Support
m Team	S3	Regular Hrs.	Typical Trackers	Line System	Production Enviro	Development
m Team	A1	Regular Hrs.	Typical Trackers	Line System	Tech Spec Document	Design & Specificatio
m Team	D1	Regular Hrs.	Typical Trackers	Line System	User Acceptance test	Documentation
m Team	D2	Regular Hrs.	Typical Trackers	Line System	User Acceptance test	Marketing
m Team	D3	Regular Hrs.	Typical Trackers	Line System	User Acceptance test	Marketing
m Team	S1	Regular Hrs.	Typical Trackers	Line System	Deployment plan	Internal Mtg. & Proj.
m Team	A1	Regular Hrs.	Typical Trackers	Line System	Deployment plan	Research & Learning
m Team	S1	Regular Hrs.	Typical Trackers	Line System	Copy to production	Other
m Team	T1	Regular Hrs.	Typical Trackers	Line System	Production test	Rollout Planning &
m Team	A1	Regular Hrs.	Typical Trackers	Line System	Production test	Research & Learning
m Team	A1	Regular Hrs.	Typical Trackers	Line System	Release	Internal Mtg. & Proj.
ent	JANE	Regular Hrs.	West Wind Transport	Fleet Card System	Development & Testing	Testing & Bug Fixes
ent	STEVE	Regular Hrs.	Internal	Process	Process	Documentation

Timesheet Report

The Timesheet report shows you a week or month of time logs organized in a timesheet-style view. Unlike traditional timesheets you are not limited to generating the timesheet for a particular User. You can instead generate the timesheet for a Project, for example, and break it down by User to see all the Users who have been working on a particular Project for the period. Or generate the timesheet for a Category and break it down by Project to see how much time has been going into a particular Category of work across your Projects.

Figure 14.2. Timesheet Report

http://whisker:81/cache/pjdswwpk.htm - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Address http://whisker:81/cache/pjdswwpk.htm Go Links

Development: Monthly Timesheet

Ember Consulting
06/01/2006 - 06/30/2006

Project	Th 1	Fr 2	Sa 3	Su 4	Mo 5	Tu 6	We 7	Th 8	Fr 9	Sa 10	Su 11	Mo 12	Tu 13	We 14	Th 15	Fr 16	Sa 17	Su 18	Mo 19	Tu 20	We 21	Th 22	Fr 23	Sa 24	Su 25	Mo 26	Tu 27	We 28	Th 29	Fr 30	Summ
Enterprise System	4.8			3.1								9.4				3.9						4.7			5.6						31.5
Line System		12.5														19.0														23.5	55.2
Remote							0.8	2.7	3.5					5.2		6.7															18.9
Supply-Chain			5.0	4.0					13.0		4.0			6.0	4.0	6.0	6.0														48.0
eCommerce											12.6						0.6														13.1
Summary	4.8	17.5	4.0	3.1			13.5	2.7	7.5	12.6		9.4	11.2	4.0		35.6	6.6					4.7			5.6				23.5	166.8	

Done Local intranet

Item List Report

The Item List report shows a hierarchical list of any type of item in the TimeTiger system. You can use this report to generate list of all your Users, for example, or only Users that belong to a particular User Group. You can optionally include the total number of hours logged to each item on this report.

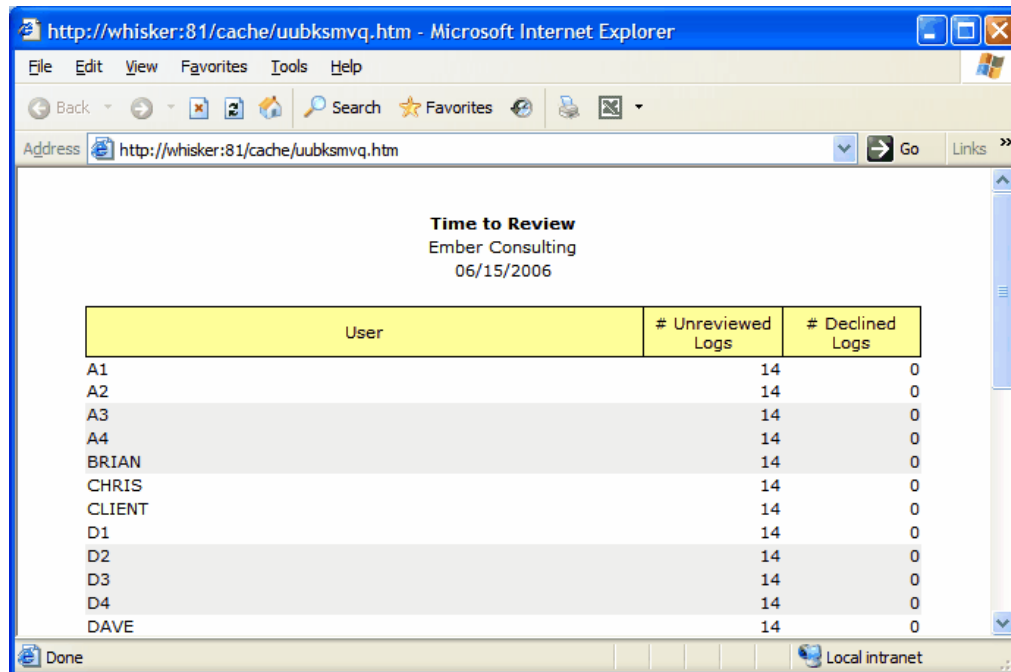
Figure 14.3. Item List Report

ID	Type	Name	Ref #	Status	Created by	Created on	Modified
0001-00000000331	Client	Arbiter Systems					
0001-00000000543	Project	Report Module		Active	SYSTEM	01/01/2006	
0001-00000000474	Project	Supply-Chain		Active	SYSTEM	01/01/2006	
0001-00000000343	Client	BK Manufacturing					
0001-00000000658	Project	Accounting Prototype Project		Active	SYSTEM	01/01/2006	
0001-00000000497	Project	FTP analysis		Active	SYSTEM	01/01/2006	
0001-00000000520	Project	RD Project Manager - Spec		Active	SYSTEM	01/01/2006	
0001-00000000355	Client	Elias					
0001-00000000566	Project	Network consulting		Active	SYSTEM	01/01/2006	
0001-00000000589	Project	Video Conferencing		Active	SYSTEM	01/01/2006	
0001-00000000367	Client	Fusion Inc.					
0001-00000000612	Project	Database Fix		Active	SYSTEM	01/01/2006	
0001-00000000635	Project	Web Site Cleanup		Active	SYSTEM	01/01/2006	
0001-00000000379	Client	Gordon Manufacturing					
0001-00000000980	Project	Accounting Prototype Project		Active	SYSTEM	01/01/2006	
0001-00000000681	Project	Enterprise System Design		Active	SYSTEM	01/01/2006	
0001-00000000704	Project	ODBCLink Pilot Project		Active	SYSTEM	01/01/2006	
0001-00000000727	Project	Ongoing Support		Active	SYSTEM	01/01/2006	
0001-00000000403	Client	InterStar					
0001-00000000911	Project	Infrastructure Document		Active	SYSTEM	01/01/2006	
0001-00000000934	Project	Network Assessment		Active	SYSTEM	01/01/2006	

Time to Review Report

Use the Time to Review report to remind supervisors that they have time logs to review in order to keep the TimeTiger data current and accurate.

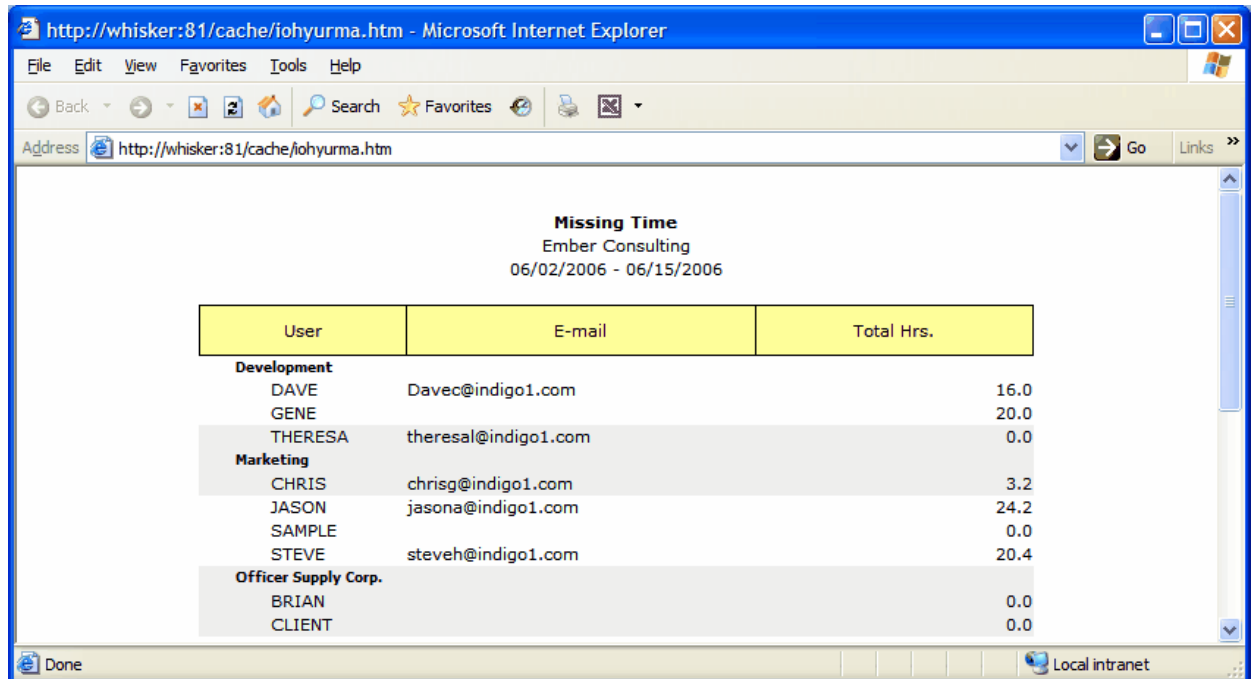
This report lists all Users in the system that are assigned to any item in a role that gives them the CAN REVIEW permission. Beside each User's name you will see a count of currently Not Reviewed logs that they have the ability to review and approve. Also, beside each User the report shows the number of logs that are marked as Declined and that were Declined by that particular User. See Time Approval.

Figure 14.4. Item List Report

User	# Unreviewed Logs	# Declined Logs
A1	14	0
A2	14	0
A3	14	0
A4	14	0
BRIAN	14	0
CHRIS	14	0
CLIENT	14	0
D1	14	0
D2	14	0
D3	14	0
D4	14	0
DAVE	14	0

Missing Time Report

The Missing Time Report shows you a list of users that have entered less than your indicated minimum number of hours over the date range that you specify. You can use this report to quickly identify users who have not logged any time for the past week, for example. If your system administrator has enabled email integration you can automatically send a reminder note to Users with a valid email address.

Figure 14.5. Missing Time Report

Missing Time
Ember Consulting
06/02/2006 - 06/15/2006

User	E-mail	Total Hrs.
Development		
DAVE	Davec@indigo1.com	16.0
GENE		20.0
THERESA	theresal@indigo1.com	0.0
Marketing		
CHRIS	chrisg@indigo1.com	3.2
JASON	jasona@indigo1.com	24.2
SAMPLE		0.0
STEVE	steveh@indigo1.com	20.4
Officer Supply Corp.		
BRIAN		0.0
CLIENT		0.0

Role Assignments Report

The Role Assignments Report lists all users and the items to which they are assigned, as well as the role in which they are assigned. This report is useful for planning and fine-tuning the Role-Based Security configuration of your application (see Role-based Security). Exporting this report to Microsoft Excel (see Export to Excel) allows you to sort and filter the columns based on the items you wish to review. You can also use the Item List report to view role assignments made for specific items.

Figure 14.6. Role Assignments Report

Role Assignments
Ember Consulting
12/18/2006

User	Item	Role
A1	Typical Trackers.Line System Team.A1	Self
A2	Typical Trackers.Line System Team.A2	Self
A3	Typical Trackers.Line System Team.A3	Self
A4	Typical Trackers.Line System Team.A4	Self
BRIAN	Officer Supply Corp..BRIAN	Self
CHRIS	Marketing.CHRIS	Self
CLIENT	Officer Supply Corp..CLIENT	Self
D1	Typical Trackers.Line System Team.D1	Self
D2	Typical Trackers.Line System Team.D2	Self
D3	Typical Trackers.Line System Team.D3	Self
D4	Typical Trackers.Line System Team.D4	Self
DAVE	Development.DAVE	Self
GENE	Development.GENE	Self
HAROLD	Officer Supply Corp..HAROLD	Self
JANE	Development.JANE	Self
JASON	Marketing.JASON	Self

Vacation Days Report

Figure 14.7. Vacation Days Report

Vacation Days Analysis as of 08/31/2012
Ember Consulting
01/01/2011 - 12/31/2011

Name	Eligible Day	Taken Day	Scheduled	Remaining
Marketing				
CHRIS	15.00	11.50	0.00	3.50
JASON	10.00	7.50	0.00	2.50
SAMPLE	0.00	0.00	0.00	0.00
STEVE	10.00	9.50	0.00	0.50
Total of Marketing	35.00	28.50	0.00	6.50

The Vacation Days report shows an *annual* summary of the total number of days (and half-days) of vacation that a user took compared with the number of days allotted to them.

To take advantage of TimeTiger's simplified Vacation Tracking feature, first assign each of your users an annual vacation allotment in days. This is done on the Properties page of each User.

Now create a Task (or Project, if your TimeTiger configuration does not include Tasks) to represent vacation time. You can name this task whatever you wish, but instruct your users to log their vacation days under this Task.



Note

It is common to include a single Client called "Internal" or something similar to represent work done within the organization that is not tied to a particular customer or revenue-producing Project. This is a good place to create the vacation Task.

In the TimeTiger Options page, choose this Task under the *Vacation Tracking* section. If you wish to track half-days of vacation, indicate the cutoff number of hours that represent a half-day taken.

You can now generate the Vacation Days report and see how many days each User has taken vs. their annual allotment.



Note

This report only makes sense when generated for a full year, and as TimeTiger only stores the most current vacation allotment for each User, you will probably only want to generate this report for the current or previous year.

Chapter 15. Custom Reports

Custom Report Overview

TimeTiger provides a flexible custom report designer which allows you to slice and dice your time and cost information in unlimited ways. To help understand a custom report, consider a grid of time information. Each cell in the grid represents an amount of time that was entered into TimeTiger. But on this grid, you decide what goes across the top and down the side.

For example, you can put Users across the top of the grid and Projects down the side. You now have a breakdown of time spent by each User on each Project.

Figure 15.1. User time by Project Report

User time by Project
Ember Consulting
06/15/2006

User Name	CHRIS	JANE	JASON	STEVE	Total
Project Name					
HR				0.2	0.2
Operations	0.7		0.8		1.5
Process		1.0			1.0
Remote Administration		3.6			3.6
Supply-Chain		3.2			3.2
Total	0.7	7.8	0.8	0.2	9.5

You can add a further breakdown by Category within each Project.

Figure 15.2. User time by Project and Category Report

User time by Project/Category
Ember Consulting
06/15/2006

	User Name	CHRIS	JANE	JASON	STEVE	Total
Project Name	Category Name					
HR	Research & Learning				0.2	0.2
Operations	Internal Mtg. & Proj. Mgt.	0.7				0.7
	Other			0.8		0.8
Process	Documentation		1.0			1.0
Remote Administration	Testing & Bug Fixes		3.6			3.6
Supply-Chain	Testing & Bug Fixes		3.2			3.2
Total		0.7	7.8	0.8	0.2	9.5

Rather than looking at this information by User, we could choose quarters of the current year instead.

Figure 15.3. Project Category Breakdown by Quarter Report

Project/Category time by Quarter
Ember Consulting
01/01/2006 - 12/31/2006

Project Name	Category Name	Quarter	Q1	Q2	Q3	Q4	Total
Accounting Prototype Project	Client Meeting				16.2		16.2
	Design & Specification				22.5		22.5
	Development				10.5		10.5
	Documentation				38.0		38.0
	Internal Mtg. & Proj. Mgt.				8.6		8.6
	Other				1.5		1.5
	Research & Learning				37.7		37.7
Accounting System	Development			9.8			9.8
	Research & Learning			5.0			5.0
	Testing & Bug Fixes			6.4			6.4
Brochure	Internal Mtg. & Proj. Mgt.		1.5				1.5
	Other		12.6				12.6
Cold Calling	Client Meeting			5.4			5.4
	Marketing		5.3	0.4			5.7
	Other			0.5			0.5
Contact Management	Development			9.7			9.7
	Research & Learning			5.4			5.4
	Testing & Bug Fixes			5.6			5.6
Database Fix	Development		18.0				18.0
	Rollout Planning & Execution		2.0				2.0
	Testing & Bug Fixes		7.0				7.0

You can group by almost any piece of information in the TimeTiger system, and can create breakdowns of cost information as well. TimeTiger's custom reporting mechanism can help answer almost any question you have about your organization's time usage.

Designing custom reports

Custom reports can be created by any user by choosing the **Create new report...** command from the Explorer **Reports** menu.

The Create/Edit Report page allows you to name the report and choose the fields that will appear. You can also set Custom Report Security options.

Some report options, such as date range, are set when you actually generate the report. This gives you the flexibility to re-use the same report for your weekly, monthly, or annual analysis, for example.

Figure 15.4. Create/Edit Report

The screenshot shows the 'TimeTiger Explorer' web application in a Microsoft Internet Explorer browser. The address bar shows 'http://whisker:81/ember/explore.htm?pageid=3'. The application has a navigation menu with 'FILE', 'VIEW', 'TOOLS', 'REPORTS', and 'HELP'. The 'Create/Edit Report' form is displayed, featuring a sidebar with the TimeTiger logo and a list of categories: User Groups, Time Types, Clients, and Categories. The main form area contains the following fields and sections:

- Report Name:** Project/Category time by Quarter
- Owner:** DAVE
- Report Security:** Anyone can run and change this report.
- Pick report fields:**
 - Fields groups across the top:** 1 Quarter (Edit, Delete), Add field
 - Fields groups down the left side:** 1 Project Name (Edit, Delete), 2 Category Name (Edit, Delete), Add field
 - Fields inside the grid:** # of Logs, Time Worked (checked), Cost of Time
- Buttons:** Submit changes, Cancel

Report Name - the unique name and description of the report. Each report in TimeTiger must have a unique name.

Owner - the user who created the report or has been given responsibility for maintaining the report.

Custom Report Security - controls who can see and make changes to the report.

Field groups across the top/down the left side - the fields that make up the structure of the report and control the categorization that takes place. An unlimited number of fields can be added to the report, but simpler reports are generally easier to read and interpret. Click **Add field** to add a field to the report. If no fields are added across the top or down the left side TimeTiger will provide a general total rather than breaking the time down.

Fields inside the grid - your report is not limited to holding the total time worked inside each grid cell. You can also include the number of time logs that compose the total, as well as the total cost of the time inside the cell (based on the cost rate of the Users who performed the work).

Custom report fields

Prior to adding fields to your custom report give some thought to the final result you are trying to achieve. Each field you add gives you numerous display and filtering options and if you have your final goal in mind your report creation process will be faster and easier.

Figure 15.5. Edit Report Field

Choose the data field - where data for this field will be drawn. This could be a field from an Item's Properties (such as its Name or Reference #), or it could be a date component (such as Quarter or Weekday).

Field caption to display - the caption to display for this field at the top of the report. TimeTiger will suggest a caption based on the data field you have selected but you can change it here.

Limit the number of levels to display - if you are including data for an Item that might have sub-Items (such as Task), you can choose to roll-up data on the report to a specific depth. For example, if you do not want 3 levels of sub-Tasks on the report but want everything summarized to the top-level Task, enter 1.

Display summary totals for this field - whether sub-total rows/columns should be added for this field in the report. By default, TimeTiger will only display summary totals for the top level field on the report (to keep the report clean and easy to read).

Show hidden items - available when you have chosen to only include specific items you select on the report (see Pick items to include below). Allows you to include items in the selection list that would normally be hidden because of their status code. For example, Inactive users would typically not be available to include unless this option is checked.

Pick items to include - by default TimeTiger will only include Items on reports that have time logs in the date range you specify when running the report. If you wish to include all Items, or only certain specific Items, change this option.



Note

If you wish to explicitly include a particular sub-Item you must also include all parent Items of the same type. So, when including a sub-Task, be sure to include the parent Task as well.

Running custom reports

To run a custom report select it from the Explorer **Reports** menu and review your report options. You can specify a date range for your report and, if you are using Time Approval also limit the logs you see based on their approval status. You can also mark logs that appear on the report as having been billed, so that they are not generated on future billing reports.

Custom Report Security

Custom Report Security allows you to choose who can see and run a particular report, and who can make changes to the report. The following options are available:

- Anyone can run and change this report
- Anyone can run this report but only the owner and administrators can change it
- Only the owner and administrators can run and change this report
- Only the owner can run and change this report

The list of available security options can be further limited through the Options page.

The Report Owner is the person who originally created the report. That person, or anyone else who can modify the report, can re-assign ownership of the report to another User.



Note

Even if a user is authorized to run a particular report TimeTiger will strictly limit the information that user sees on the report based on their permissions in the system (see Role-based Security). Because of this, different users may see different data even though they have generated the same report.

Custom Report Tips

Design your report in your mind or on paper before building it in TimeTiger. The exercise of thinking through your objectives will help you create a simpler and more informative report in TimeTiger.

Build your report a field at a time and generate the report often during your build process to confirm that TimeTiger is displaying the information you expect. A common mistake is trying to build a complex report all at once and then troubleshooting the final result when the report does not appear as you expected. Building up your report field by field will alert you to potential problems earlier.

Chapter 16. AutoMail

AutoMail Overview

TimeTiger can automatically email any report, including custom reports, to selected users on a schedule you define.

AutoMail is a powerful tool that can help boost the effectiveness of TimeTiger by automatically routing relevant time and project metrics to the individuals that most need the data. Consider using AutoMail for the following purposes:

- Personal Timesheets can be emailed to users on a daily or weekly basis to show how they are spending their own time (and encourage them to enter complete data into TimeTiger).
- A monthly Time Log report can be generated for each billable project (optionally along with a QuickBooks export file) to help automate your billing process.
- The Missing Time report can be scheduled every week to provide TimeTiger administrators with an overview of who has not been entering data and to automatically email those individuals with a reminder.
- Project costing reports can be sent to executive management every quarter to provide a high-level overview of where the organization is allocating its resources.

There are many other possible uses for AutoMail. Give some thought to the information you and your organization can use from TimeTiger and schedule it to appear automatically in your inbox.



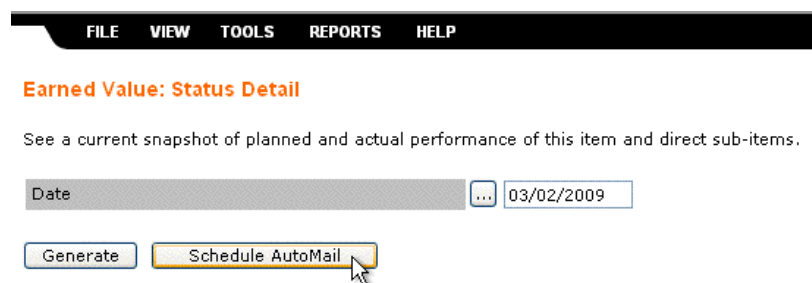
Note

Prior to seeing the AutoMail scheduling options, AutoMail must be enabled for your TimeTiger application. If you do not see the AutoMail scheduling option for your application, please contact Indigo technical support to have the feature enabled.

Scheduling AutoMail

Any report can be scheduled as an AutoMail. When setting report options (for standard reports) or on the report generation page (for custom reports), click the **Schedule AutoMail** button.

Figure 16.1. Scheduling an AutoMail report



You can then specify the schedule and distribution list for your report. Reports can be emailed daily, weekly, or monthly and on a specific day of the week or month.



Note

All AutoMail reports for a TimeTiger application are emailed at the same time of day. This time is typically set early in the morning and can be changed by request by contacting Indigo Technical Support. It is a good idea to set this at a low-usage time so that potentially intensive or time consuming reports do not slow down TimeTiger for your other users.

Figure 16.2. Editing a schedule

Earned Value: Status Detail

See a current snapshot of planned and actual performance of this item and direct sub-items.

Schedule AutoMail

You can set a schedule so that this report is automatically generated and e-mailed to the users you specify. Make sure you have set each user's e-mail address in TimeTiger.

Report Name	Earned Value: Status Detail
Automatically e-mail report	Every ... Single ... Friday of ... Every week
Recipients	<input checked="" type="checkbox"/> Development <input type="checkbox"/> ADMIN <input checked="" type="checkbox"/> DAVE <input type="checkbox"/> JANE <input type="checkbox"/> KEN <input type="checkbox"/> THERESA <input type="checkbox"/> Marketing <input type="checkbox"/> Officer Supply Corp. <input type="checkbox"/> Typical Trackers

Save Cancel Test

When choosing users for your distribution list, choose only users that have a valid email address assigned on the User Properties page. Also, you must have already configured an email server in the TimeTiger Setup and Configuration console. This is already set up for you if you use TimeTiger Online.

You can have TimeTiger AutoMail reports delivered to any user in TimeTiger that you can normally see in the TimeTiger Explorer and that has a valid email address. Note, however, that users who receive the *same AutoMail report* may still see *different data appearing on that report*, subject to their own permissions in TimeTiger. Just as with all TimeTiger reports, the ability to *generate* a report does not necessarily mean you can *see everything* on that report. To avoid confusion about why users see different versions of the same report, carefully assign roles and permissions so that everyone has the correct access. See Role-based Security for more information.

Reviewing and Editing Scheduled Reports





You can always see the AutoMail reports you have scheduled in **TimeTiger Explorer > Reports > Edit AutoMail schedule**. This will show the list of AutoMails you have personally scheduled.




Note

The list of scheduled AutoMail reports is individual to each user in TimeTiger, and can only be viewed and modified by that user. If you delete a user from TimeTiger, their scheduled AutoMail reports will be removed as well.

Figure 16.3. Scheduled AutoMails

FILE VIEW TOOLS REPORTS HELP			
Scheduled AutoMail Reports			
These are the reports you have scheduled to be automatically e-mailed. You can edit or remove reports on this page. To add a new AutoMail report, click the Schedule button on the appropriate report generation page.			
Edit	Name	Schedule	Last Run
	Earned Value: Status Detail	Every Single Friday	None
	Missing Time for Development	Every 1st Day of Every month	None
	Monthly time log report	Every 1st Day of Every month	None
			

The schedule and settings of any report can be modified, or the AutoMail removed entirely, by clicking the  button.

AutoMail Tips

AutoMail is a great way to automate information distribution in TimeTiger and should be considered for any report you plan on running more than once. Resist the temptation, however, to AutoMail *everything* as this can desensitize your recipients to the information you provide.

Each email message sent by TimeTiger includes the username of the TimeTiger user who created the AutoMail. Messages are sent in HTML format, and also include an attachment version of the report that can be opened directly from Microsoft Excel with all formatting intact.

Chapter 17. Options

Options Overview

The Options page, accessible from the Explorer **Tools** menu, allows the *System Admin* to configure application-specific settings for the current application.

Most changes to TimeTiger options take effect immediately but some changes will not become evident to users until the next time they log into TimeTiger.

General Options

Organization Name - the name of your company or organization. This name appears at the top of all TimeTiger reports.

Keep dropdown menus on screen until Close button is clicked - this checkbox determines whether dropdown menus and lists are "sticky." Sticky lists stay on the screen until the user clicks the ✕, whereas normal lists will disappear as soon as the user's mouse pointer moves outside of them.

Time Logging Options

Show % Complete - determines whether the % Complete field is displayed on the Log Time page and in reports.

Use To Do item description when logging time if Work in Progress is blank - when logging time for a To Do item that has text in its Work in Progress field TimeTiger will automatically use that text as the default Status/Description on the Log Time page. If there is no Work in Progress, check this box to use the actual name of the To Do item as the default description for the time log.

Lock time logs made prior to - when this box is checked and a date is specified TimeTiger will prevent the modification or deletion of any logs made prior to this date, even by a System Admin. This is a good way to lock down periods (fiscal years or months) and prevent inadvertent changes to historical data.



Note

If an item is deleted from the system that item's logs will be deleted as well, even if some of those logs fall inside the locked out period. Consider marking the item as Inactive rather than deleting it entirely (See Status Codes).

Optional Time Log Fields

You can add up to 3 additional fields to be displayed to the user when entering their time. You can specify rules that determine what type of information can be entered into these fields and provide instructions shown to users for each optional field.

Formatting Options

Date Format - choose the way in which you would like TimeTiger dates displayed.

Date Separator - choose the character that separates numbers in the date.

For example, the default Month, Day, Year format and default separator '/' will show June 23, 2006 as 6/23/2006. Changing the separator to '-' will make the date appear as 6-23-2006. Further changing the order to Year, Month, Day will show the date as 2006-06-23.

Reporting Options

Display Durations As - choose the number of decimal places to display on TimeTiger reports. Because TimeTiger calculates and rounds each cell of a report separately rounding errors can occasionally cause totals and sub-totals in reports to vary slightly from the actual sum of the column or row. Increasing this setting to 2 decimal places reduces these variations.

Allow users to make their reports public - uncheck this box to prevent users from using the *Anyone can run and change this report* and *Anyone can run this report but only the owner and administrators can change it* security options for custom reports. This can prevent the needless clogging of everyone's report lists by users forgetting to mark their own personal reports as owner-only. See Custom Report Security.

Log Approval Options

Enables or disables the TimeTiger approval workflow. See Time Approval.

Billing Options

Allow logs to be marked as billed - determines whether TimeTiger tracks the billing status of each log. Checking this box enables the *Mark as Billed* dropdown on some reports, and allows you to filter reports based on the billing status of logs.

The remaining Billing Options are related to TimeTiger's QuickBooks integration features and are described in QuickBooks Options.

Chapter 18. QuickBooks Export

QuickBooks Export Overview

TimeTiger can export time logs to Intuit QuickBooks to make billing and invoicing easy. If you prefer, you can use TimeTiger in place of the Timer application (provided with some versions of QuickBooks) so that your entire organization can track and export their time.

Before taking advantage of QuickBooks integration you must first prepare your TimeTiger database and ensure that the names of certain key items in TimeTiger are matched with their corresponding QuickBooks items. After this has been done, you can periodically run the Time Log report and generate a QuickBooks IIF Export file at the same time. You then import that IIF file into QuickBooks to prepare for billing.

TimeTiger can keep track of the logs that you have exported so that you only export new time logs each time you run the process. For example, once you export time logs for this month you will not export the same logs when you run the procedure next month.

QuickBooks version compatibility

The export file created by TimeTiger is compatible with QuickBooks Pro 2003 and later.

Preparing TimeTiger for QuickBooks integration

In order to take advantage of QuickBooks export from TimeTiger, you must take a number of preparatory steps.

Ensure that Clients and Categories are in your TimeTiger database

TimeTiger Clients are exported as QuickBooks Customers and TimeTiger Categories are linked to QuickBooks Service Items and Activity Types, so your TimeTiger database must have the ability to hold Clients and Categories. If you do not see Clients and Categories in your Explorer left-side tree, please contact <support@indigo1.com> for assistance in modifying your database.

Ensure that Projects are in your database if you wish to use Customer:Job in QuickBooks (optional)

If you use the additional level of detail provided by QuickBooks to separate Customers into various Jobs and you want TimeTiger to export its Projects as QuickBooks Jobs, you must have TimeTiger Projects in your TimeTiger database. If you do not see Projects in your TimeTiger Explorer (they will usually be under Clients), please contact <support@indigo1.com> for assistance in modifying your database.

Ensure that Time Types are in your database if you wish to use different QuickBooks Payroll Item types (optional)

If you use multiple Payroll Items in QuickBooks you can link TimeTiger Time Types to different QuickBooks Payroll Items. This requires your TimeTiger database to hold Time Types. If you do not see

Time Types in your TimeTiger Explorer, please contact <support@indigo1.com> for assistance in modifying your database.



Note

You do not need Time Types in your TimeTiger database if you use a single QuickBooks Payroll Item for all your time.

Match up your QuickBooks Customer (and Job) names with TimeTiger Client (and Project) names

You should create or rename your TimeTiger Clients so that they match up with your QuickBooks customer list. The names must be exactly the same in order to allow you to export logs from TimeTiger to QuickBooks.

If you use Jobs in QuickBooks and want to export TimeTiger Projects as QuickBooks Jobs, also make sure that the names of your TimeTiger Projects match up with your QuickBooks Jobs.



Note

If you export time logs that are assigned to Clients (or other items) that are not in your QuickBooks customer list you will receive an error when you attempt to import the IIF file. You should try to keep the TimeTiger items matched up with QuickBooks items as closely as possible. For example, when creating a new Customer in QuickBooks, create the corresponding Client in TimeTiger at the same time.

Match up your QuickBooks Activity Classes and Service Items with TimeTiger Categories

TimeTiger lets you match up your Categories with QuickBooks Activity Classes and Service Items. Go into each of your TimeTiger Categories in the TimeTiger Explorer **Properties View** and choose the **QuickBooks** tab. Enter the QuickBooks Activity Class and Service Item for each of your Categories. Make sure that the spellings match the QuickBooks items exactly.



Note

You can assign several different TimeTiger Categories to the same QuickBooks Activity Class and/or Service Item, and even assign all of your Categories to the same Activity Class and/or Service Item.

Match up your QuickBooks Payroll Items with TimeTiger Time Types

If you use different QuickBooks payroll items you can link them to your TimeTiger Time Types. Go into each of your TimeTiger Time Types in the TimeTiger Explorer **Properties View** and choose the **QuickBooks** tab. Enter the QuickBooks Payroll Item for each of your Time Types. Make sure that the spellings match the QuickBooks items exactly.

Match up your QuickBooks employees with TimeTiger User names

TimeTiger uses the **Full Name** field in the User Properties page to link your users to QuickBooks employees. Go through each of your users and ensure that their Full Name is assigned to the exact spelling of the QuickBooks Employee Name.

Turn on TimeTiger Billing features

While logged in as a TimeTiger *System Admin*, go to **TimeTiger Explorer, Tools, Options**.

In the **Billing** section, check **Allow logs to be marked as billed**. This option is not required to allow you to export logs to QuickBooks but can help ensure that each log is only exported once.

For **QuickBooks Customer:Job**, choose whether you want to link only your TimeTiger Clients to QuickBooks Customers, or if you want to link both your Clients and Projects to QuickBooks Customers and Jobs.

For **QuickBooks Payroll Item**, choose whether you want your TimeTiger Time Types to determine the QuickBooks Payroll Item for your logs or if you wish to use a single, specific Payroll Item for all logs exported from TimeTiger. If you do not use QuickBooks Payroll Items at all, choose **Use a specific, fixed Payroll Item for all logs** and leave it blank.

Submit your changes.

Exporting TimeTiger Time Logs

The key to the QuickBooks export process is the **Time Log** report. Once you have prepared your TimeTiger database to integrate with QuickBooks you can run the **Time Log** report as often as you wish to transfer logs from TimeTiger to QuickBooks.

When you are ready to export TimeTiger logs to QuickBooks, choose **Reports, Time Log** from the TimeTiger Explorer.

Choose the date range that you wish to export. If you want to export all Time Logs that have not yet been exported, choose **All**.

If you want to export logs for a specific Client or Project, for example, check **For a specific item** and pick the item for the export.

The **Group and Sort By** option will determine the sequence in which your logs will be exported to QuickBooks. By default, logs are exported in chronological (date) order.

For **Mark as Billed**, choose **Display unmarked logs and mark them as billed**. Once TimeTiger creates your export file it will mark all logs that appear on the report as billed and will not include them on future exports.

Check **Create QuickBooks Import (IIF) file**.

Click **Generate**.

Your report will pop up in a separate window. In the main TimeTiger Explorer window, click **Download QuickBooks Import (IIF) File**.

Save the file *timelog.iif* to a convenient place on your hard drive. This is the file that you will import into QuickBooks.

Importing Time Logs into QuickBooks

After downloading the *timelog.iif* file, open the QuickBooks application. From the QuickBooks **File** menu, choose **Import, IIF Files....**

Select the *timelog.iif* file you exported from TimeTiger.

Once the file has been imported proceed with your QuickBooks billing as you would normally.



Note

The QuickBooks commands and procedures may vary slightly for different versions of QuickBooks. Please consult your QuickBooks documentation or contact [<support@indigol.com>](mailto:support@indigol.com) for further help.

Chapter 19. Microsoft Project Synchronization

TimeTiger can integrate with Microsoft Project and synchronize a TimeTiger Project with a Microsoft Project schedule.

Microsoft Project Sync Overview

Synchronizing with Microsoft Project lets you take advantage of Project's excellent scheduling and planning facilities to map out your project plan and then use TimeTiger's powerful tracking and analysis features to keep your project on track as it proceeds. You can *plan* in Microsoft Project and *track* in TimeTiger.

Once you have created your plan in Microsoft Project and imported it into TimeTiger, your users track their time against the tasks you defined in your schedule. You can (optionally) sync periodically to keep your Microsoft Project file updated with the current tasks in TimeTiger. You can even add tasks to either TimeTiger or your Microsoft Project plan and sync periodically to update both TimeTiger and Project with the most recent changes.

Requirements for Microsoft Project Sync

TimeTiger can synchronize with Microsoft Project 2003 Professional (and later) files saved in XML format. Currently TimeTiger does *not* integrate with earlier versions of Microsoft Project and does not integrate with Microsoft Project Server or Project Central.

To take advantage of Microsoft Project synchronization, your TimeTiger database must have been created with *Projects* and *Tasks*. If you do not see Projects and Tasks in your Explorer left-side tree, please contact <support@indigo1.com> for assistance in modifying your database.



Note

If your TimeTiger deployment has been customized for you, Projects and Tasks may have been renamed to something specific to your organization (for example, Work Orders or Cases). In this situation you will still be able to synchronize with Microsoft Project.

Step by Step: Microsoft Project Sync

Create your project schedule in Microsoft Project. If you assign resources at this point use the same names for your resources as your TimeTiger User Names. If your Microsoft Project names match exactly with your TimeTiger User Names the synchronization process will automatically create To Do items for the tasks assigned to each user.

From Microsoft Project, choose **File, Save As...** and change the **Save as Type** to **XML Format**. Name your project plan (it will be saved with a .xml extension rather than the typical .mpp extension).



Note

TimeTiger only understands Microsoft Project files saved using the .xml file type and cannot directly integrate with Microsoft Project files with the .mpp extension.

In the TimeTiger Explorer, create a new Project but do not add any Tasks to it. Click on the Project you have created to select it. On the right-side of the TimeTiger Explorer, click **Synchronize with Microsoft Project**.

Click the **Browse** button and select the file you saved from Microsoft Project (with the .xml extension). Click the **Synchronize** button.

In a moment you will be informed that TimeTiger has reviewed your Microsoft Project file and is ready to perform the synchronization. Click the **Synchronize** button and wait for a few moments.

This next step is important if you wish to periodically synchronize your Microsoft Project plan with the TimeTiger Project. When you are told that *You are almost finished* you *must* click **Download Microsoft Project XML File**. When asked where you would like to save the file, navigate to the location where you originally put your .xml file and select it to *overwrite* it with the file from TimeTiger. You will be replacing the .xml file from Microsoft Project with the file from TimeTiger.



Note

If this is a one-time import from Microsoft Project and you will not be synchronizing the plan with TimeTiger as it changes you do not need to click **Download Microsoft Project XML File**.

You can now click **Finished downloading file**. Your complete project plan will appear on the left-side of the TimeTiger Explorer and your TimeTiger users will automatically receive To Do items for tasks to which they have been assigned (provided their TimeTiger user name matches their Microsoft Project resource name).

You can start tracking time to your TimeTiger tasks and can continue working with the project plan in Microsoft Project. Make sure that you open the .xml file you downloaded from TimeTiger and make changes to that .xml file (and not some previous version of the plan you may have saved in .mpp format). Continue saving your plan by choosing Microsoft Project's **File, Save As...** command and choosing the .xml file format. When you are ready to re-synchronize with TimeTiger simply follow this procedure again.

You can synchronize as often as you like and it is a good idea to synchronize whenever major changes have taken place in either the Microsoft Project plan or in the TimeTiger Project. Be sure to continue saving over the same .xml file in Microsoft Project and do not forget to download overtop of the same .xml file from TimeTiger. This will ensure that both Microsoft Project and TimeTiger are always looking at the latest view of your project and are communicating the correct, complete changes with every sync.

Microsoft Project Synchronization Fields

This section describes the fields that are transferred from Microsoft Project to TimeTiger, and vice-versa, during a sync. TimeTiger Task information is updated from Microsoft Project when a new task is added to the Microsoft Project plan or the plan is changed after the last sync and after the particular task has been last modified in TimeTiger. Microsoft Project task information is updated from TimeTiger when a new Task is added to the TimeTiger Project or when a TimeTiger Task has been changed after the last sync occurred and after the Microsoft Project file was last modified.

Table 19.1. Sync from Microsoft Project to TimeTiger

Microsoft Project field	TimeTiger field
Name	Name
Start date	Estimated Start
Finish date	Estimated End
Work	Estimated Work
Cost	Estimated Cost

Microsoft Project field	TimeTiger field
WBS	WBS Code

Table 19.2. Sync from TimeTiger to Microsoft Project

TimeTiger field	Microsoft Project field
Estimated Work	Work, Regular Work, Work Variance
% Complete	Percent Complete, Percent Work Complete, Physical Percent Complete
Estimated Cost	Cost, Fixed Cost
Estimated Start	Start date, Early Start, Late Start
Estimated End	Finish date, Early Finish, Late Finish
Estimated End - Estimated Start	Duration
Estimated Work less % Complete	Remaining Duration, Remaining Work

Microsoft Project Sync Tips

If you plan on keeping your Microsoft Project plan updated by periodically syncing after the initial TimeTiger import, try to sync fairly often. Also, try to make project plan changes in either TimeTiger or Microsoft Project but not both. Although TimeTiger will try its best to reconcile changes made in either Microsoft Project or TimeTiger it will have an easier time if changes to the plan are made in one system or the other.

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