TimeTrak - User Setup

White paper
3.1.24 - 2015

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Introduction

As the staff come and go, TimeTrak will need to be updated to reflect that.

A user with the Global Administrator permissions will be able to log into the TimeTrak Admin Console and either delete a user or add a new user.

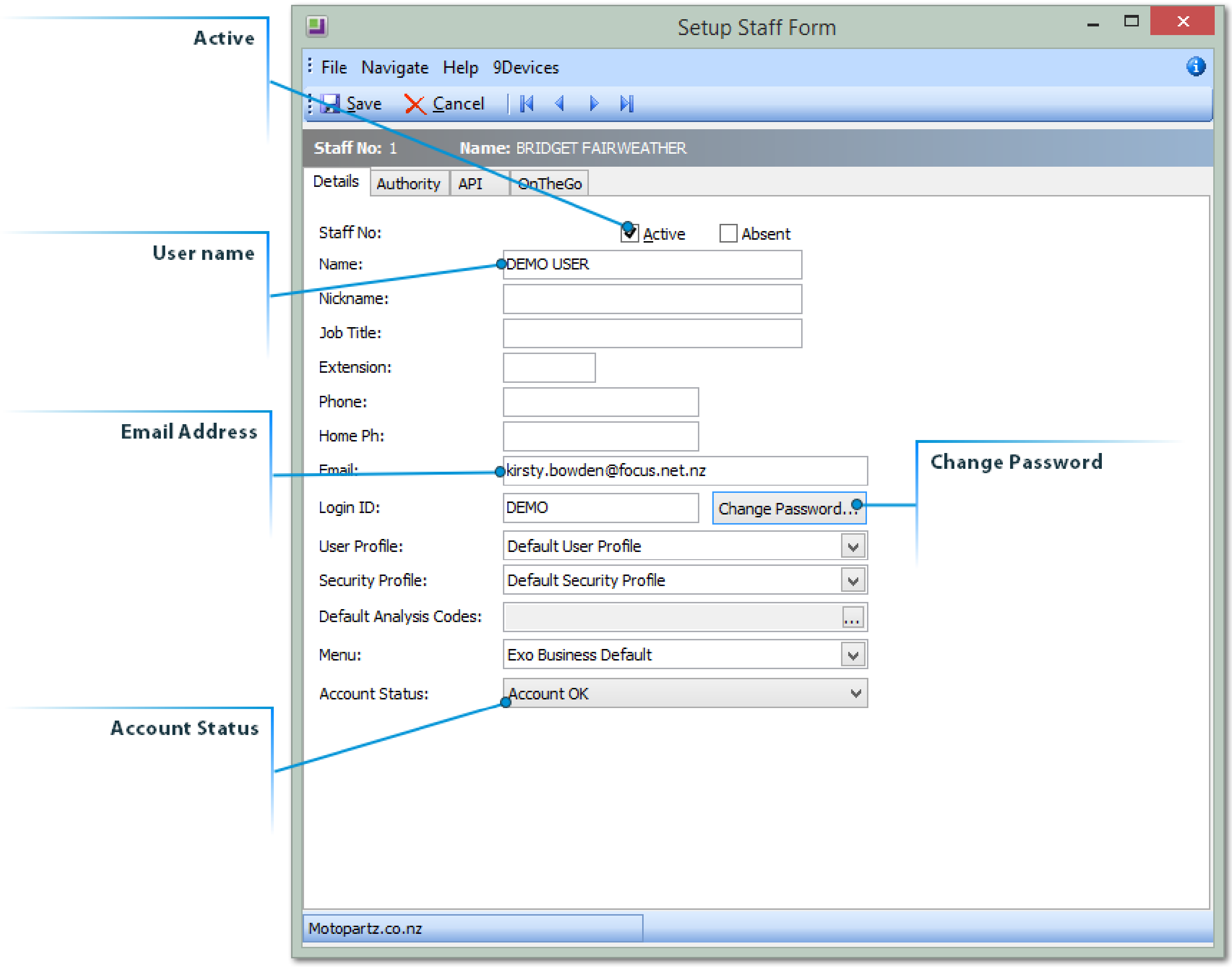
If you are increasing the number of users, it might be your licenses will need to be increased also.

Please contact Focus Technology Group at **support@exosoft.net.nz** to request an increase in licenses.

There is some setup required in both MYOB Exo and TimeTrak to get the new user up and running.

Before you begin please consider permissions you would like the user to have.
If there is someone who is already set up in the same role with the correct permissions please note what settings they have.

MYOB Exo - Setup Staff



- **Active**
  The staff member will need to be active in MYOB Exo for TimeTrak to be able to pull them through.

- **User name**
  Enter in the staff persons user name.

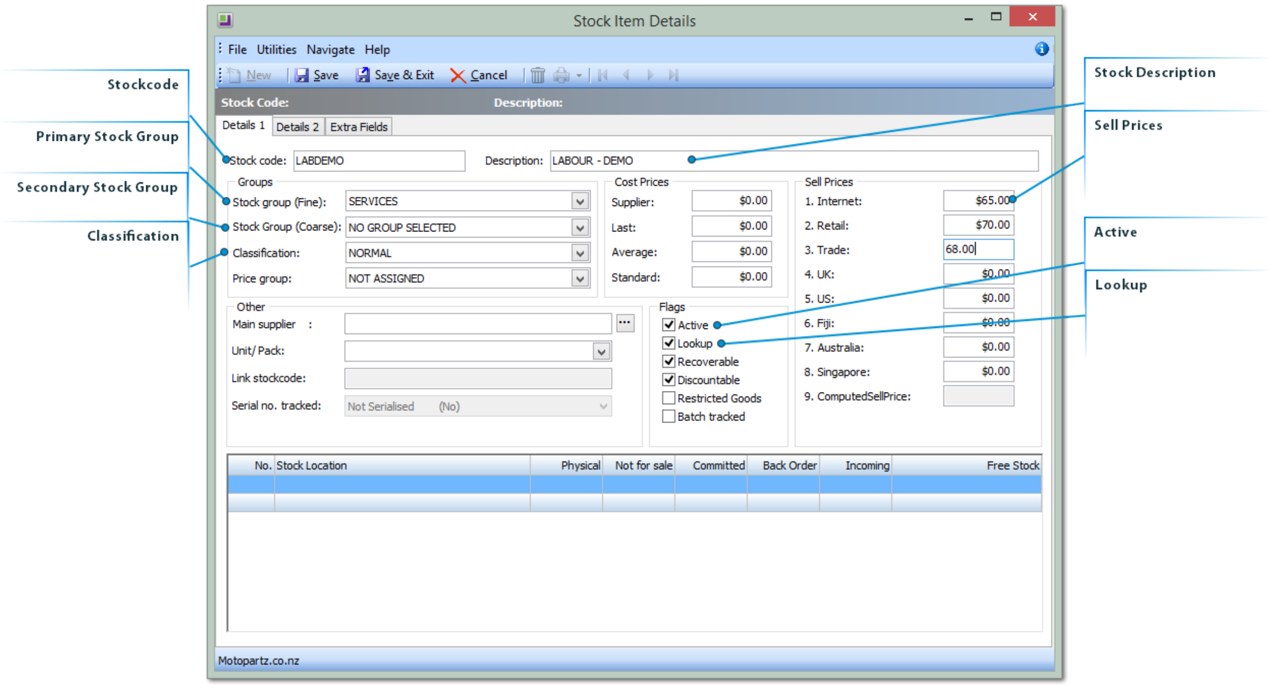
- **Email Address**
  Enter in a valid email address for the user. TimeTrak will pull this through in the user setup.

- **Change Password**
  Click here to enter in a password.

- **Account Status**
  Make sure the account status is set to OK.

MYOB Exo - Stock Item Setup

Labour codes will need to be set up.
This can be just the one labour code that all users will use or each user can have their own labour code.
The Stock Item will need to be a lookup.



- **Stockcode**
  Enter in the stockcode.

- **Stock Description**
  Enter in the stock description. This could have the staff persons name.

- **Primary Stock Group**
  Select the correct stock group, this is used for reporting by MYOB Exo.

- **Secondary Stock Group**
  Select the secondary stock group, this is used for reporting with MYOB Exo.

- **Sell Prices**
  Update all active Sell prices, these will be picked up by TimeTrak.

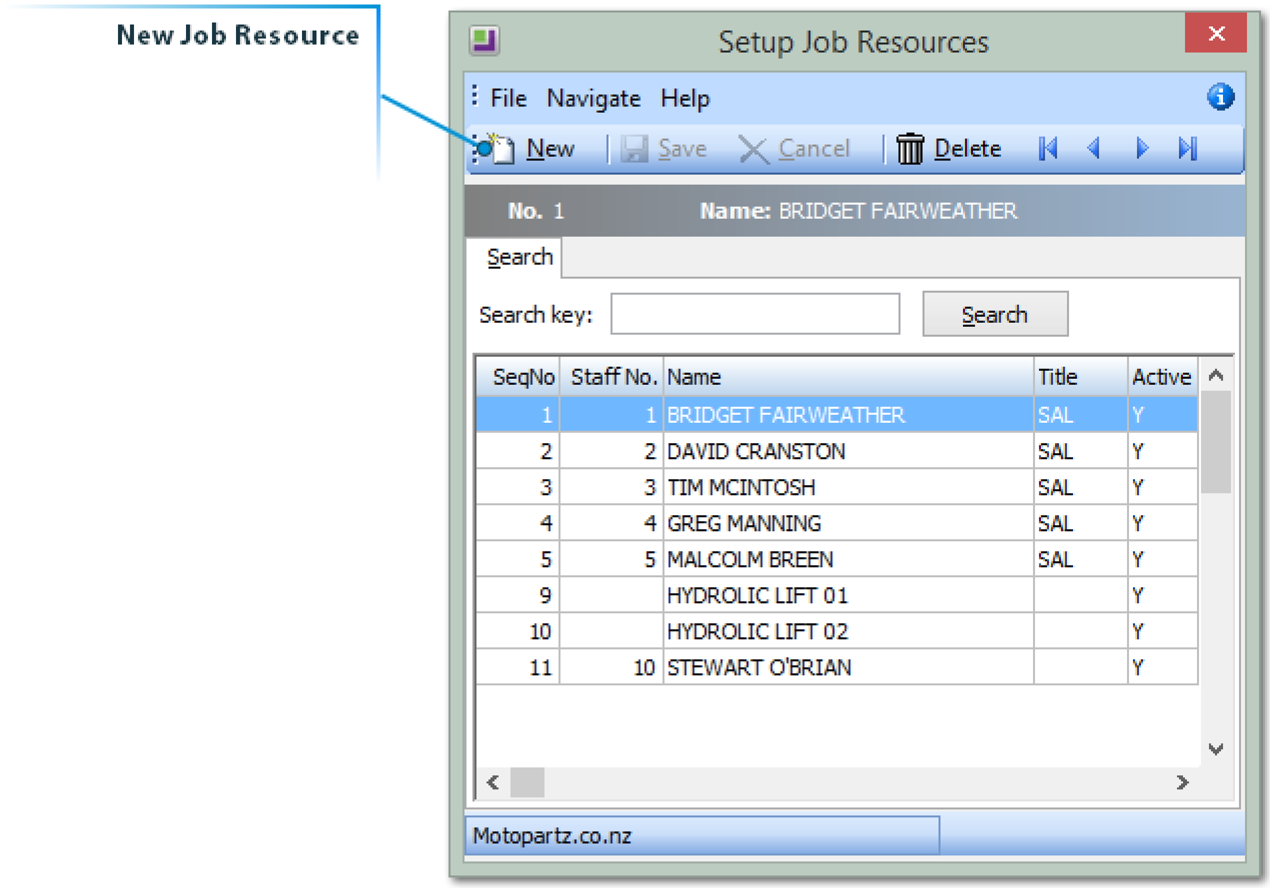
- **Classification**
  Select the stock classification.

- **Active**
  Make sure the stock item is active.

- **Lookup**
  The stock item should be a look up item, this means it is never actually purchased but can be sold.

MYOB Job Costing - Job Resources Setup

Once the staff user and their labour has been set up then a job resource will need to be created to pull it all together.



- **New Job Resource**
  Click on New to create a new job resource.

The Job Resource will need to be active and link the staff person and labour code.

Active

Set the Job Resource as active.

Staff Person

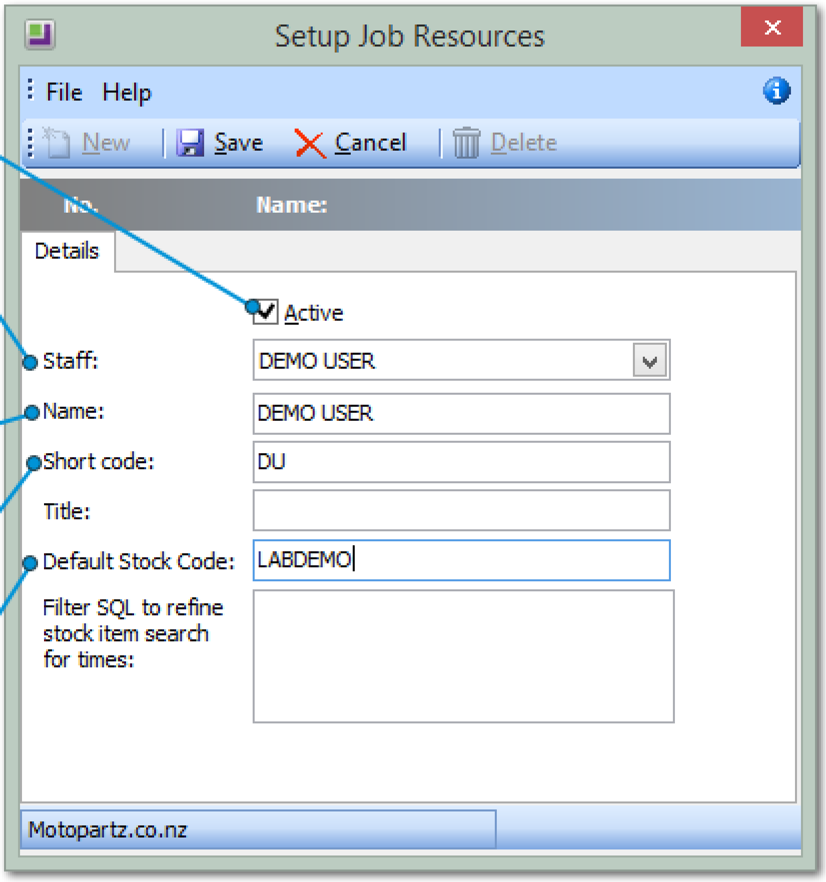
Select the newly created staff person.

Staff Name

Short Code

Stockcode

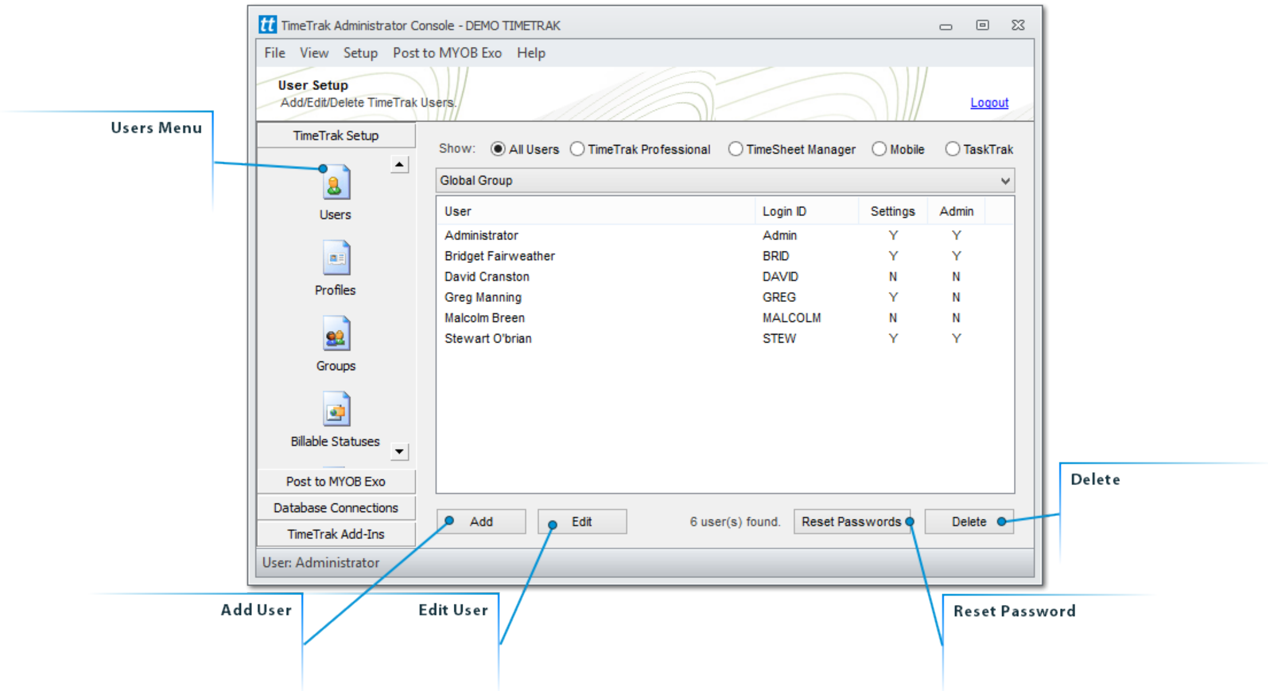
Put in the default labour code for the staff person.



TimeTrak Admin Console - User Setup

Once the staff person, labour code/s and job resource are all set up in MYOB Exo then the user can be added into TimeTrak via the TimeTrak Admin Console.

Go to the Users Menu to get started.



- **Users Menu**
  Click into the users menu to add or edit a user.

- **Add User**
  Click here to add a new user.

- **Edit User**
  Click here to edit a user.

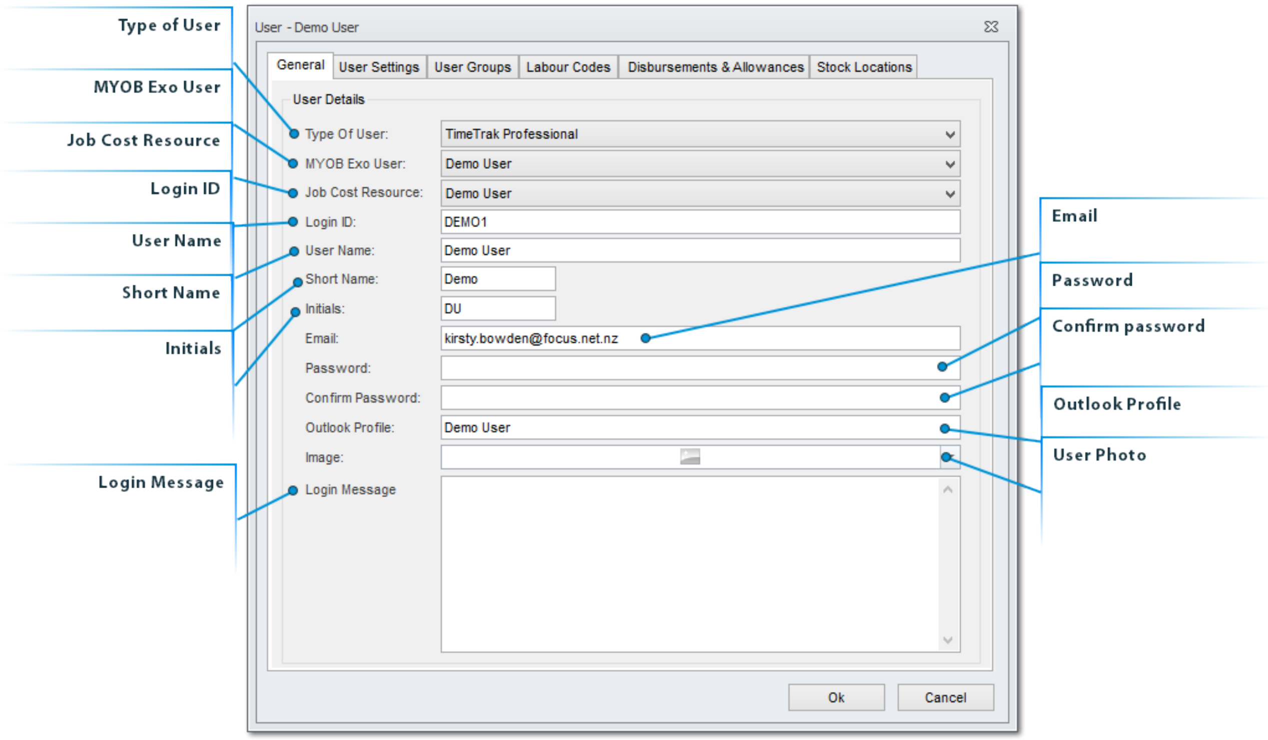
- **Reset Password**
  This is a global reset of passwords.

- **Delete**
  Click here to delete a selected user.

The user is not actually removed from the database for data integrity but made inactive.

*Please **do not** rename a user as all historical time for the old user will be shown as time and disbursements for the new user.*

User Setup - Add User



- **Type of User**
  Select the module the user is going to be licensed for.
The options are TimeTrak Professional, Timesheet Manager and TimeTrak Mobile.

- **MYOB Exo User**
  Select your newly created user from MYOB Exo.

- **Job Cost Resource**
  This will populate automatically if the job resource is set up correctly.

- **Login ID**
  This will default to what is in MYOB Exo but can be overwritten.

- **User Name**
  This will automatically populate from MYOB Exo but can be overwritten.

- **Short Name**
  This will automatically populate from MYOB Exo but can be overwritten.

- **Initials**
  This will automatically populate from MYOB Exo but can be overwritten.

- **Email**
  This is a required field and is used by TimeTrak.
This will automatically populate from MYOB Exo but can be overwritten.

- **Password**
  If you have a password policy you will need to make sure the password complies with that.
Keep note of the password to give the new user.

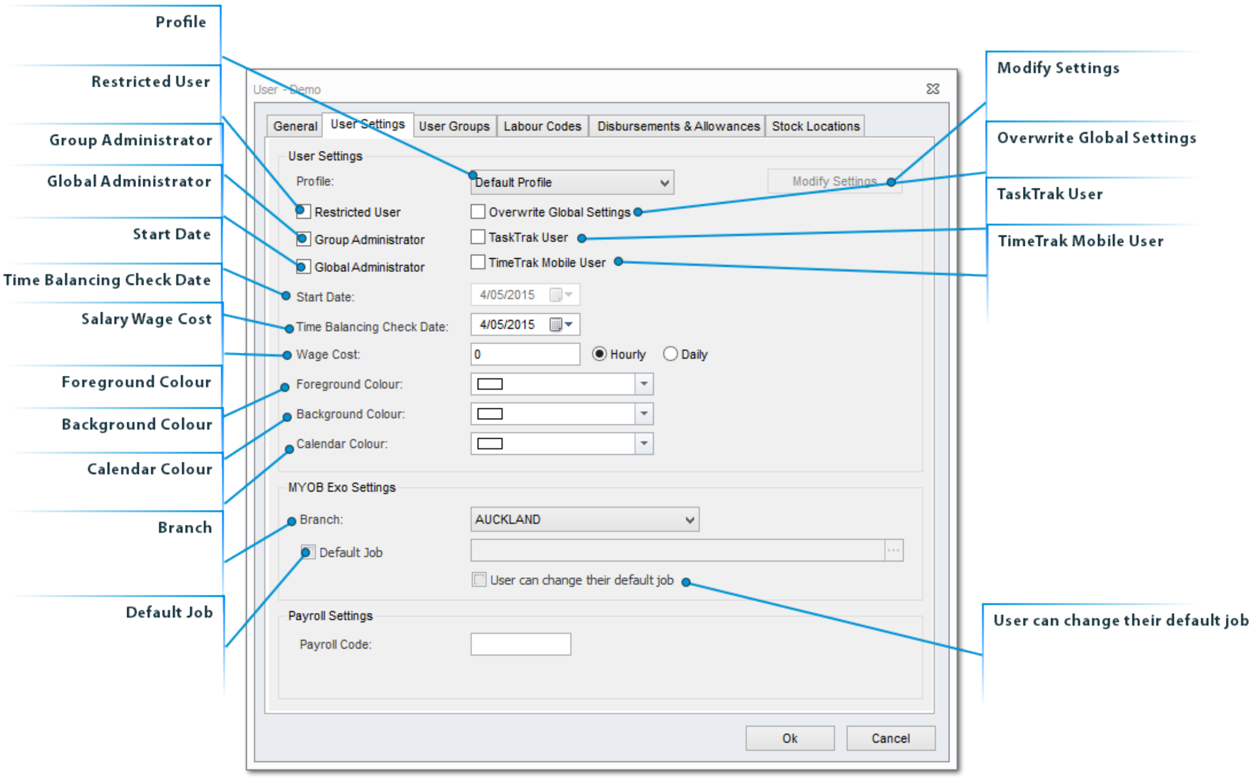
- **Confirm password**
  Both passwords need to be the same.

- **Outlook Profile**
  Please make sure the Outlook Profile name is correct.
The TimeTrak Outlook Add in looks at this setting.

- **User Photo**
  If you would like the user to have a photo image for the maps then you can load it here.

- **Login Message**
  If the user requires a user specific message on log in you, add it here.

User Setup - User Settings



- **Profile**

  Select the profile the user should be assigned to.

This is the Mobile profile and only required when the Mobile website is used and the user is licensed to use the website.

- **Restricted User**

  Tick this setting to restrict the user from seeing anything other than their own tasks, time entries and reports for the clients they are assigned to as Job Managers.

This setting is perfect for Contractors who are not regularly employed by the organisation.

- **Group Administrator**

  This setting will allow the user to see the Calendars, reports and tasks for all users in the same groups they, themselves are assigned to.

- **Global Administrator**

  The Global Administrator setting will let the user see all groups and all staff even if they are not assigned to the groups.

- **Modify Settings**

  This link will take you into the users settings for the different modules.

- **Overwrite Global Settings**

  Tick this setting to overwrite the global settings and make the Modify Settings link active.

- **TaskTrak User**

  Tick this if TaskTrak is enabled and the user needs access to TaskTrak.

- **TimeTrak Mobile User**
  Tick this if the Mobile website is installed and the user needs access to the Mobile website.

- **Start Date**
  This is the start date for a user and is recorded in the database for reporting purposes in TimeTrak.

- **Time Balancing Check Date**
  Tip. This date selector needs to reflect the correct go live date for the user to have Time Balancing to start.

- **Salary Wage Cost**
  The wage cost function allows the administrator to set the cost value when posting transactions to MYOB Exo.

This is designed to accurately *cost* salaried employees.

- **Foreground Colour**
  This setting allows the user to edit the colour of the foreground of the TimeTrak Screen.

- **Background Colour**
  This setting allows the user to edit the colour of the background of the TimeTrak Screen.

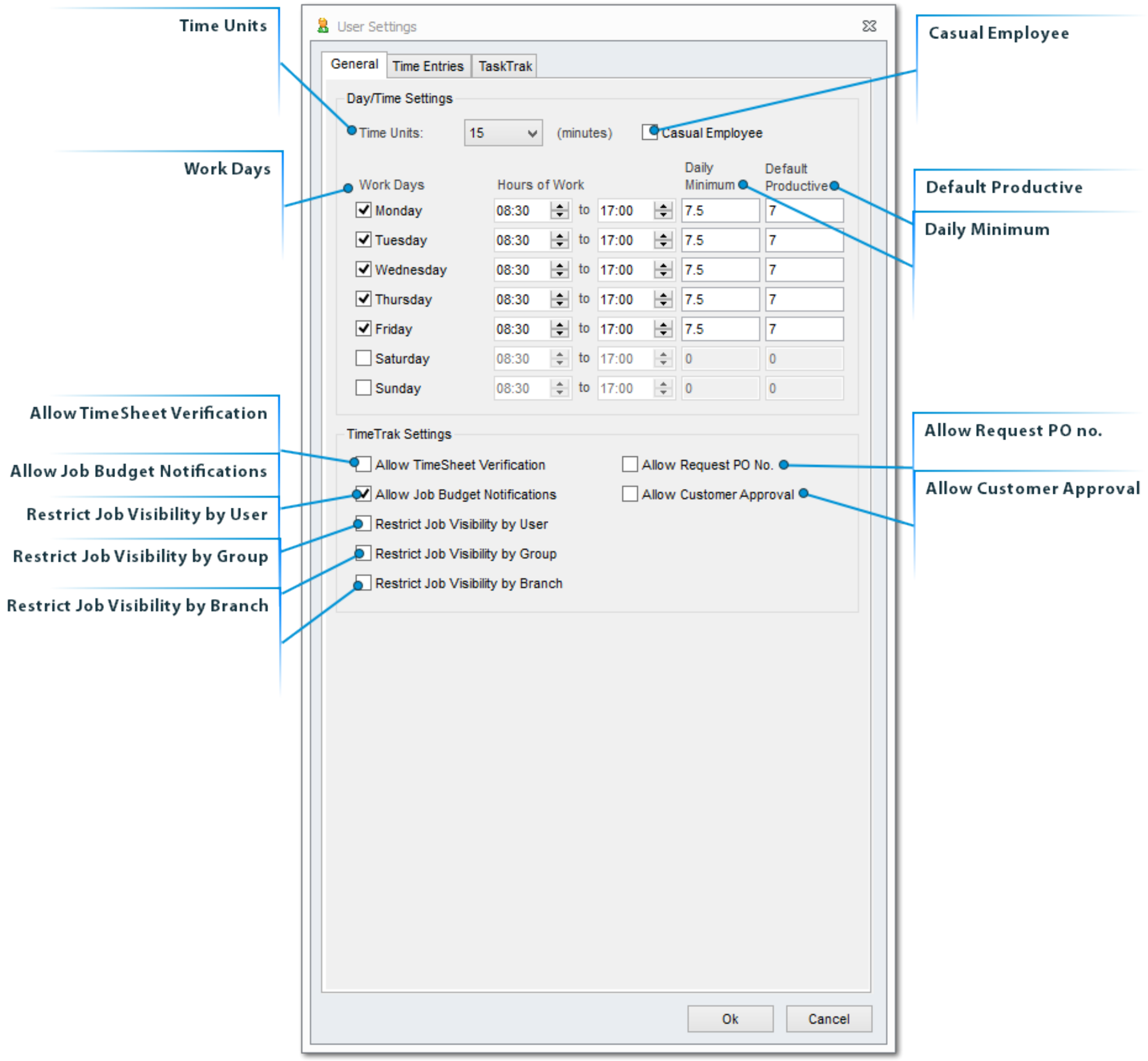
- **Calendar Colour**
  This setting allows the user to edit the colour of the background of the Calendar Screen.

- **Branch**
  Select the Branch the users time should be posted against.

- **Default Job**
  If the user has a default job then this can be set up in this setting.

- **User can change their default job**
  Tick this setting if the user will default to their default job but they are allowed to choose a different job.

Modify Settings - General Settings



- **Time Units**

  Set this to the minimum measure of time you would charge out to your clients.

***Note:** Keep in mind if you have payroll integration this might need to be set to a different time unit due to payroll exports and there can only be one measure of time in TimeTrak.*

- **Work Days**

  Set up the normal working week in days and hours.

This can be set differently for each user.

- **Casual Employee**

  The casual employee check box indicates that "Compulsory Time Balancing" should calculate based on days.

It also stops the automatic overtime calculation from calculating when using TimeSheet Manager.

- **Daily Minimum**

  Add in the daily minimum of hours the users in general should be at work, excluding breaks.

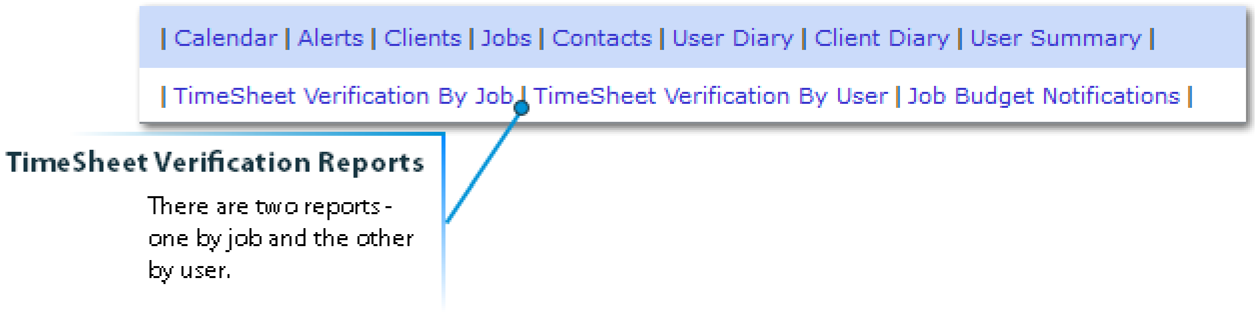
This can be set differently for each user.

Default Productive

Set the default productive hours expected from the general users. This can be set differently for each user.

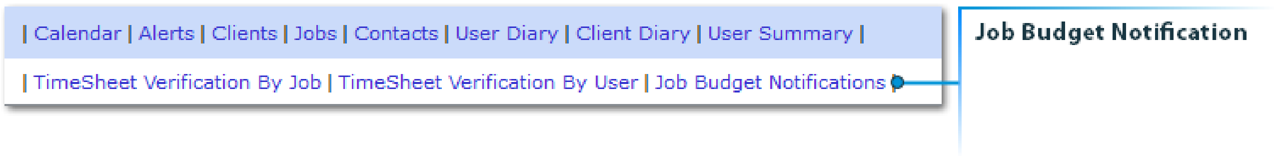
Allow TimeSheet Verification

This setting adds the verification reports to TimeTrak Professional and allows the user permissions to verify time.



Allow Job Budget Notifications

If there is a budget set up in the Quote/Budget tab of the MYOB Job Costing job, users will be notified of the budget and can view the budgets in the Job Budget Notification report.



Restrict Job Visibility by User

This will restrict the jobs seen by the user to only the MYOB Job Costing jobs they are assigned as the Job Manager against.

Restrict Job Visibility by Group

This will restrict the user to view only the MYOB Job Costing jobs, that have been assigned to the TimeTrak user group.

Restrict Job Visibility by Branch

This will restrict the users to only be able to see MYOB Job Costing jobs in the same branch the user has been assigned to in MYOB Exo.

Allow Request PO no.

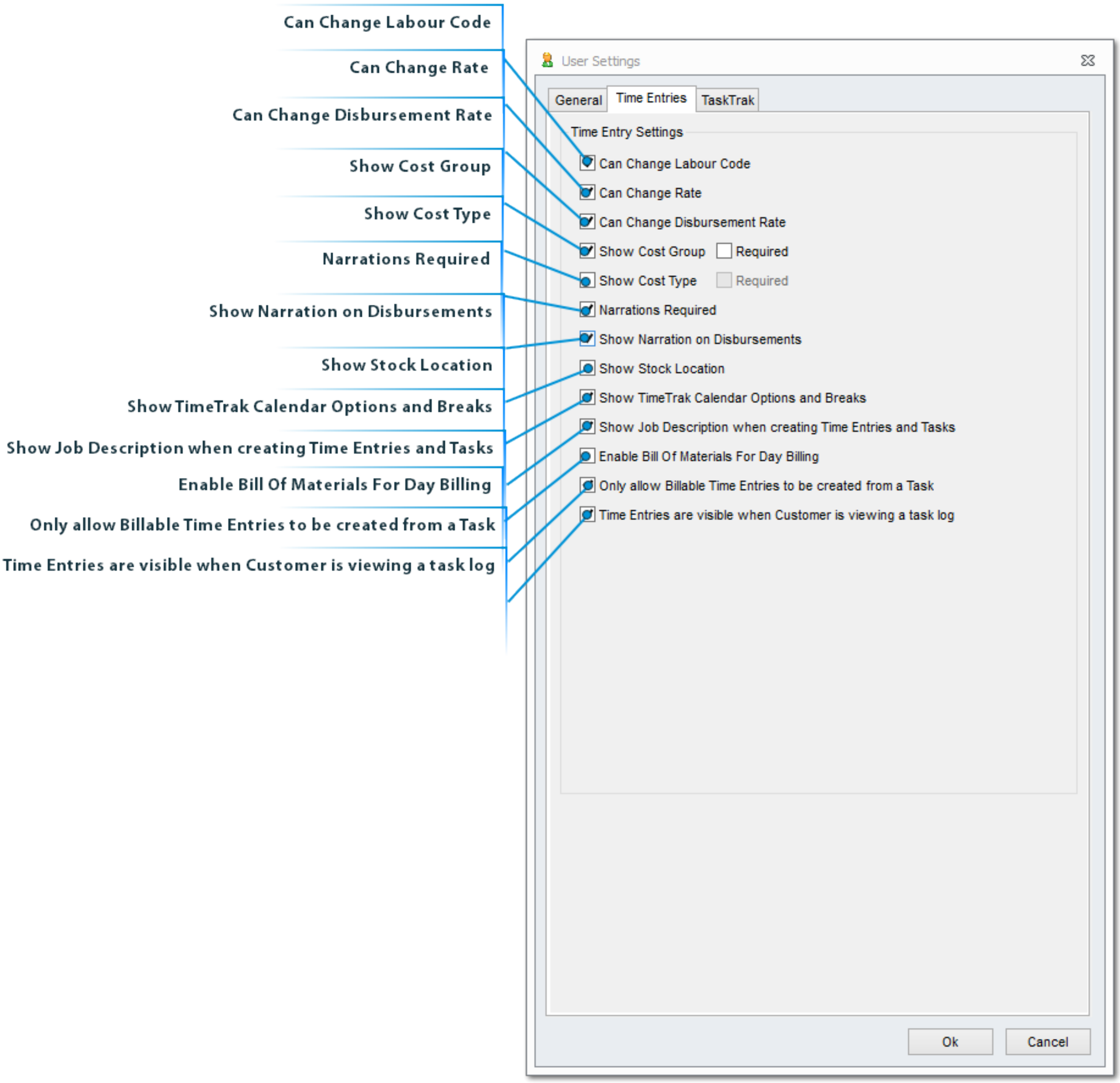
This setting enables a report in TimeTrak Professional showing the jobs without purchase order numbers and sends out an email to client requesting an order number.

Note: *TimeTrak will only send one email per client with multiple jobs in list.*

Allow Customer Approval

This setting will give the user access to the Customer Approval function. This requires the extra module Client Approval .
Please see our website for more information.

Modify Settings - Time Entries



- **Can Change Labour Code**
  Allows the user to select another rate from their labour rate dropdown list in the Time Entry screen.

- **Can Change Rate**
  User can overwrite the charge out rate.

- **Can Change Disbursement Rate**
  User can overwrite the disbursement charge out rate.

Example - MISC code is used for all disbursements and each use has a different charge out value.

- **Show Cost Group**
  This will display the Cost Group on the Time Entry Screen and the **Required** tick box enforces a selection from a Cost Group.

- **Show Cost Type**

In this example **Cost Type** has been renamed to Activity and will show in the Time Entry Screen and the **Required** tick box enforces a selection from the Cost Types.

- **Show Narration on Disbursements**

Display the narrations box when adding a disbursement to a Time Entry.

- **Narrations Required**

Enforces the need for a narration against the Time Entry
Used to describe the work done during the time frame of the time entry.

- **Show Job Description when creating Time Entries and Tasks**

The Job Description entered against the job in MYOB Job Costing will be visible when creating a Task or Time Entry.

- **Show Stock Location**

The stock location will be visible when selecting a disbursement.

- **Show TimeTrak Calendar Options and Breaks**

Displays the options to split over entries or breaks in the Time Entry screen.

- **Time Entries are visible when Customer is viewing a task log**

This allows clients logging into the Client Portal to see the time entries for the users.

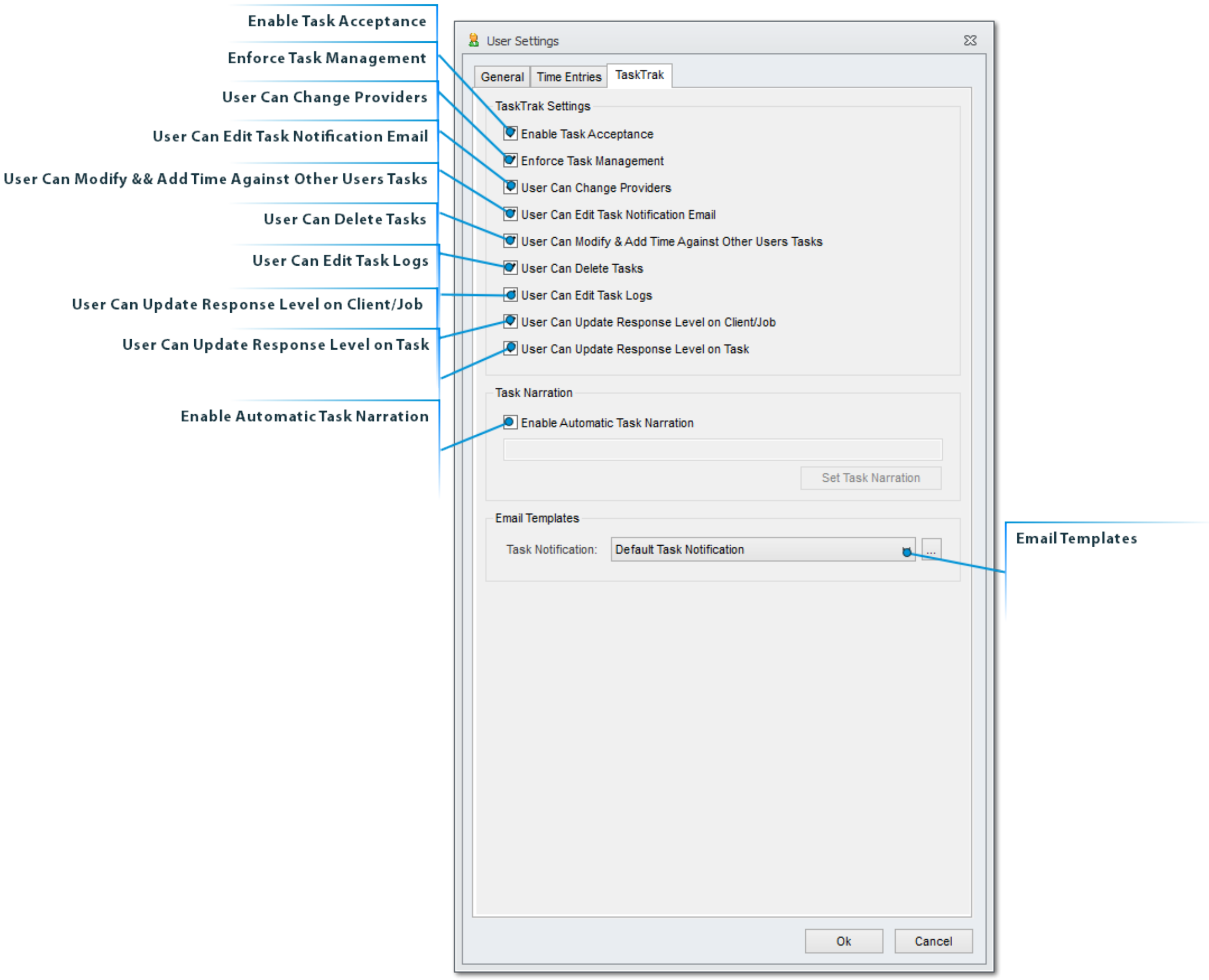
- **Enable Bill Of Materials For Day Billing**

Will be removed in future versions of TimeTrak Admin Console.

- **Only allow Billable Time Entries to be created from a Task**

This enforces that only billable time can be put against a Task.
Any other time (No Charge, Written off) will be allowed on a task.

Modify Settings - TaskTrak



- **Enable Task Acceptance**

  This setting allows users to accept or decline a task from within a pop up when the user logs into TimeTrak Professional or Mobile.

- **Enforce Task Management**

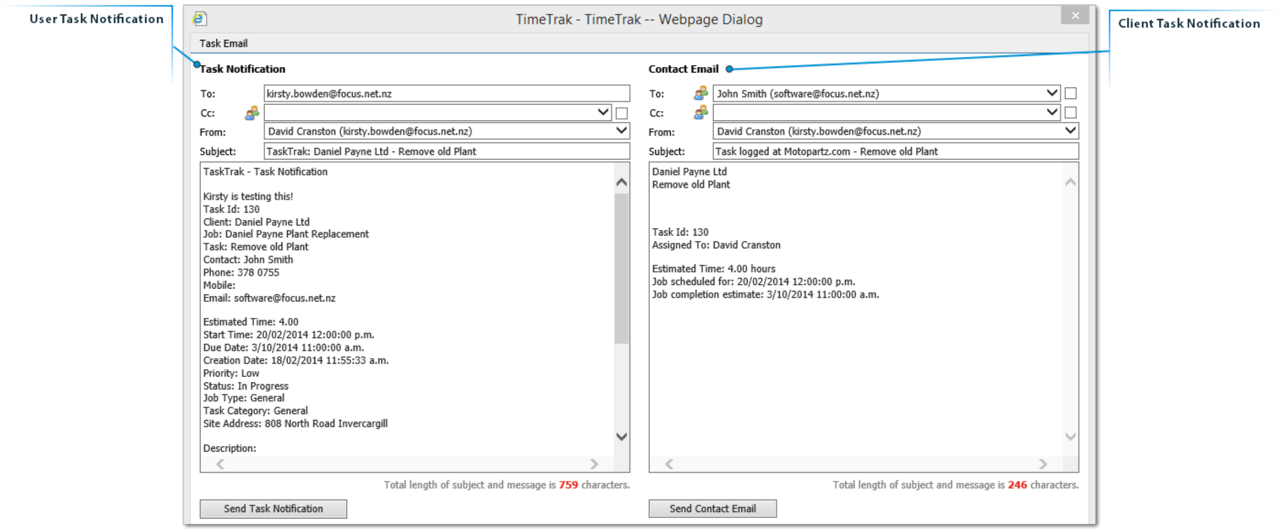
  This setting allows user to modify and update tasks from within a pop up when the user logs into TimeTrak Professional or Mobile.

- **User Can Change Providers**

  Against a MYOB Job Costing, job a Lead Provider and Secondary Provider are set. With this setting the user can update these to themselves or to someone else.

- **User Can Edit Task Notification Email**

This allows users to make changes to the User Task notification email and the Client Task notification before it is emailed.



- **User Can Modify && Add Time Against Other Users Tasks**

This setting allows users to edit and add time against other TaskTrak users.

- **User Can Update Response Level on Client/Job**

If response levels are set up then users can update the response level.

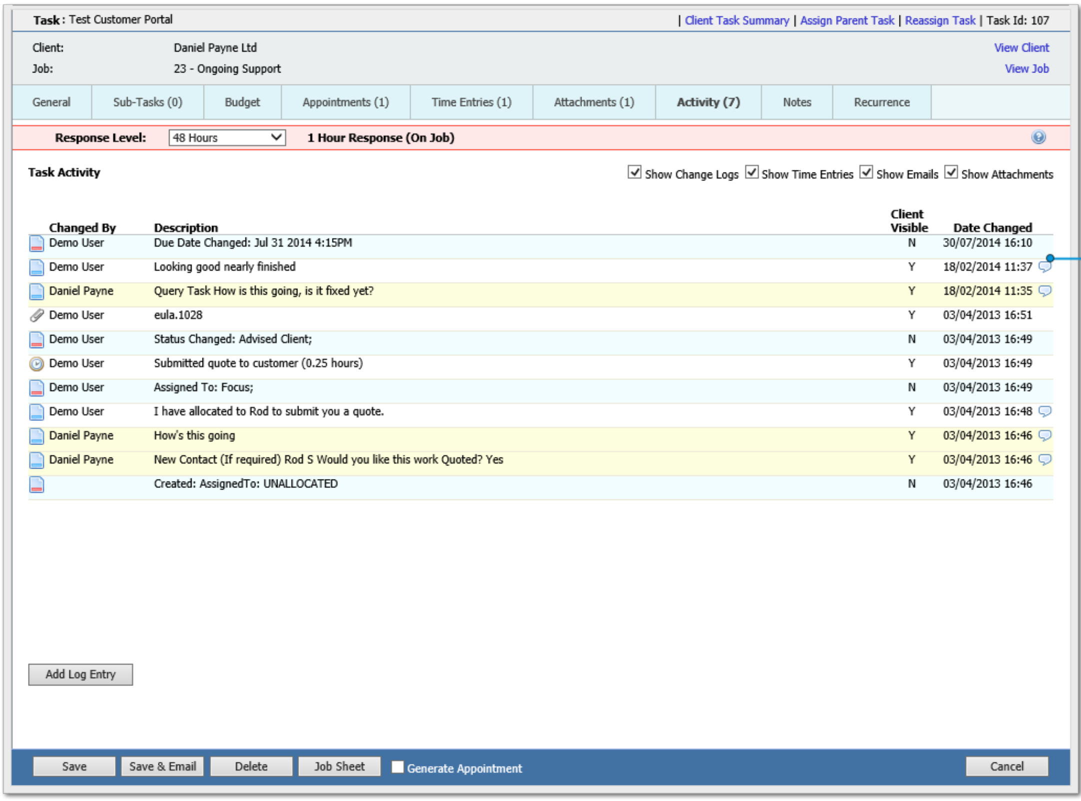
- **User Can Delete Tasks**

This setting allows users to delete Tasks.

Tip. Tasks can only be deleted if they have no time assigned to them.

[User Can Edit Task Logs]

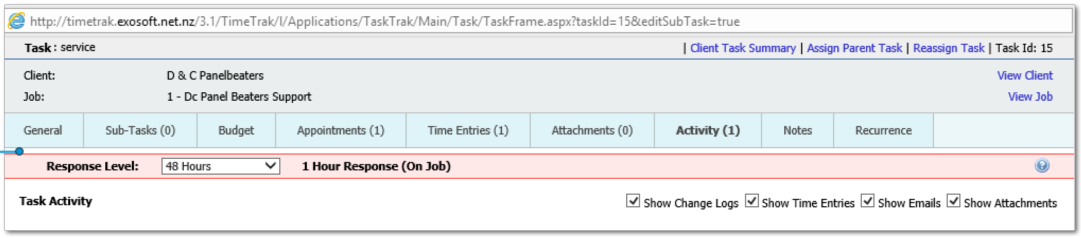
Users can edit Task Logs, otherwise called Activities in the Task Screen.



Edit Activity Log

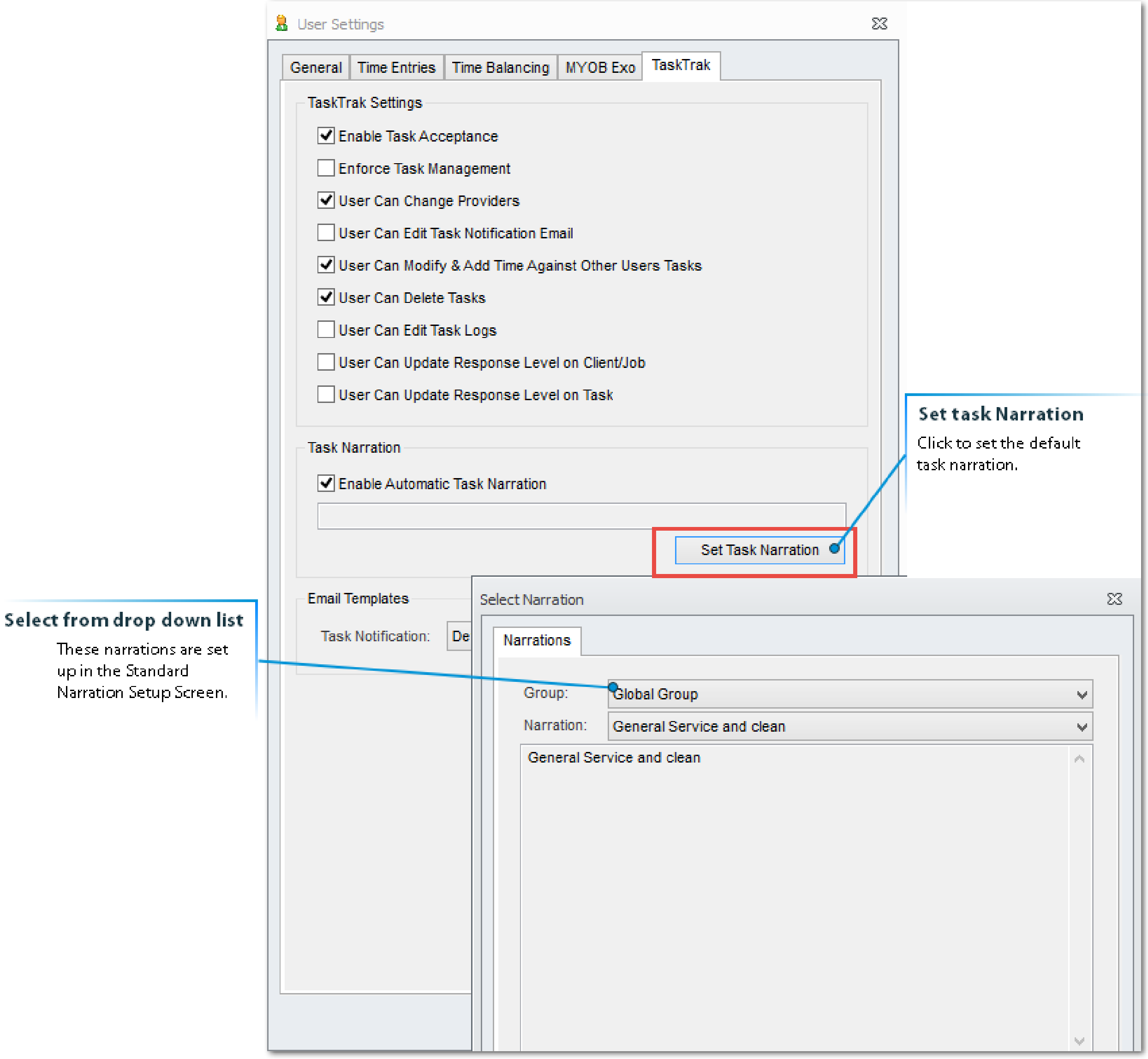
[User Can Update Response Level on Task]

Update Response Level



Enable Automatic Task Narration

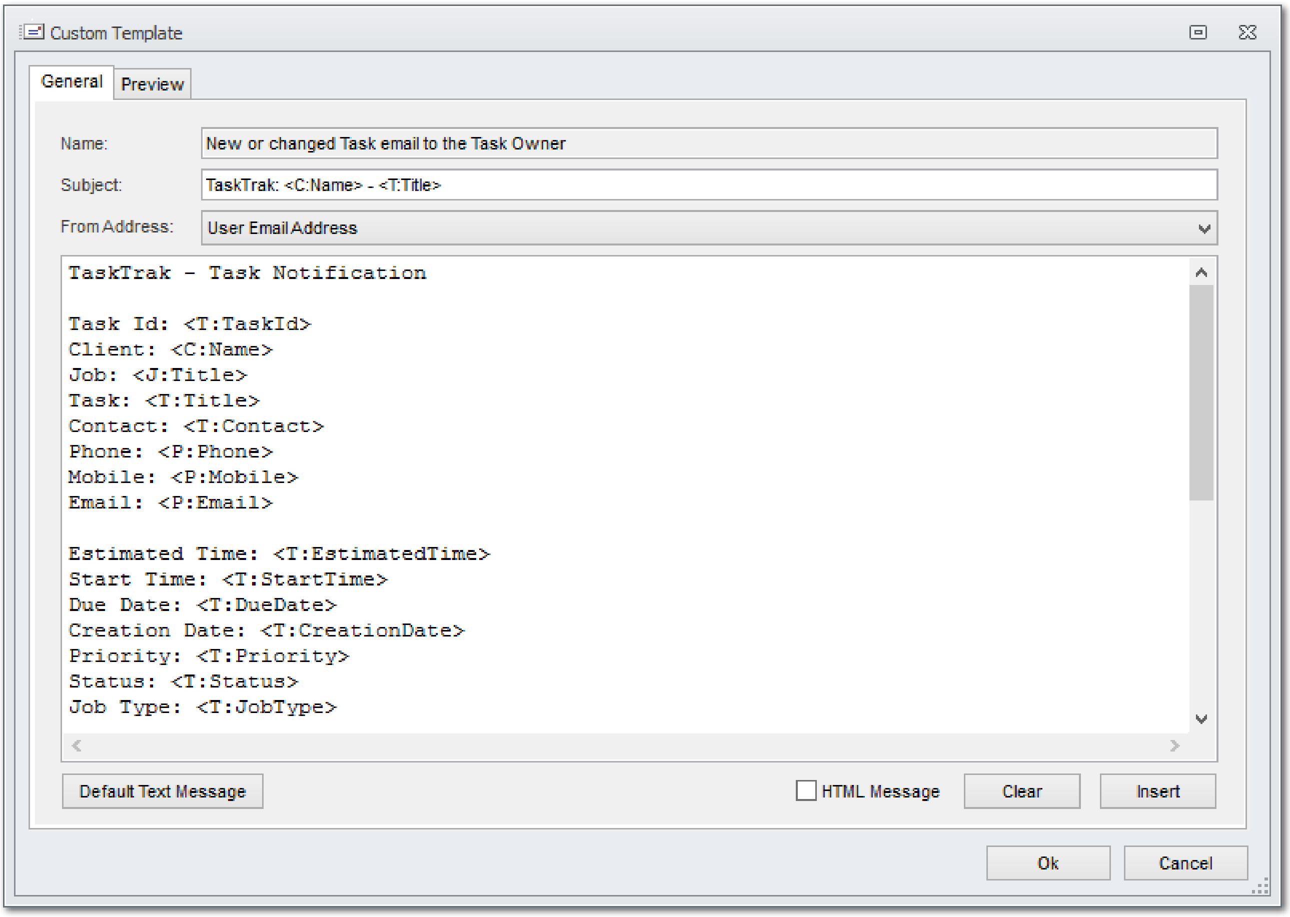
Tick this on to turn on Automatic Narration, the Set Narration button will become visible. This pulls in narrations which are set up in the Standard Narration Setup screen.



Email Templates

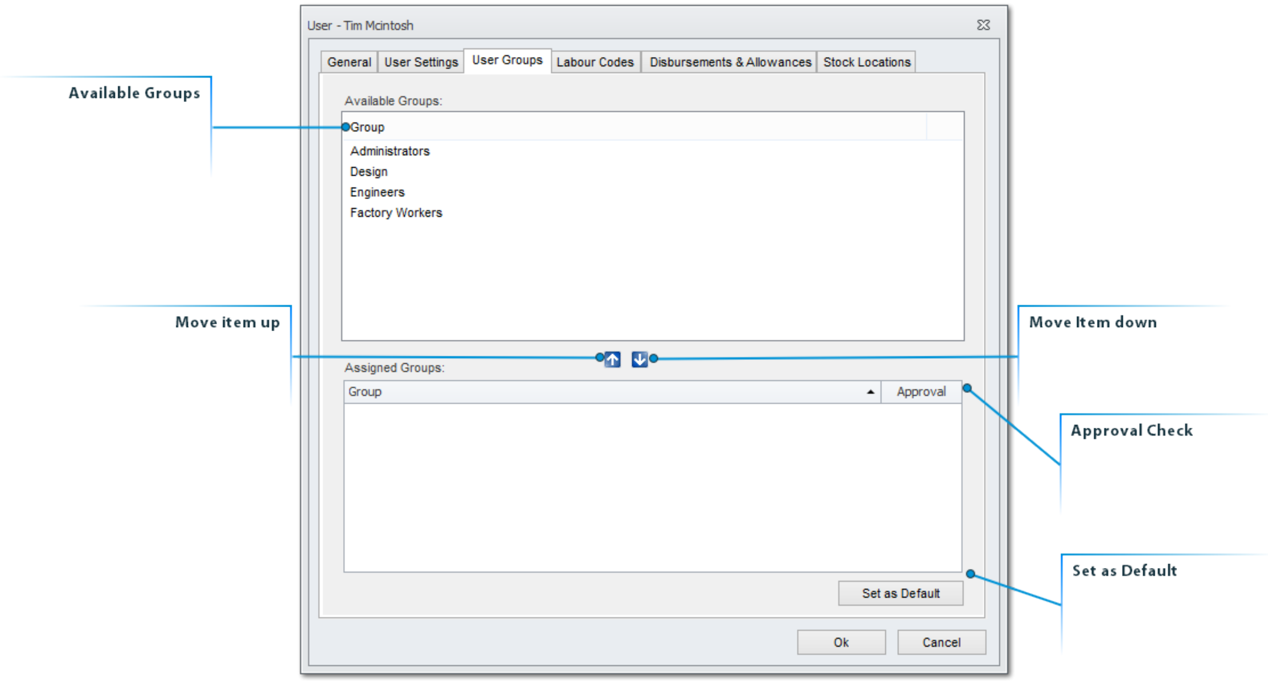
The Default Task Notification can be modified, this setting can be set as a global setting and it can also be found against the Users Settings.

When users click on the eclipse (...) , the email custom template will open.



User Setup - User Groups

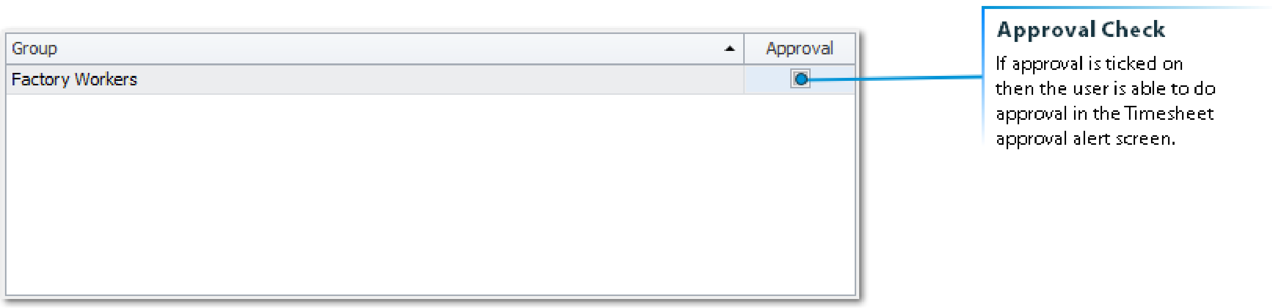
A user can have more than one group that they can be assigned to but they will need a default group.



- **Available Groups**
  Select the grouping the user should be in. This can group the user by work type or permissions. A user can have more than one group.

- **Move item up**
  This unassign's the group from the user.

- **Approval Check**

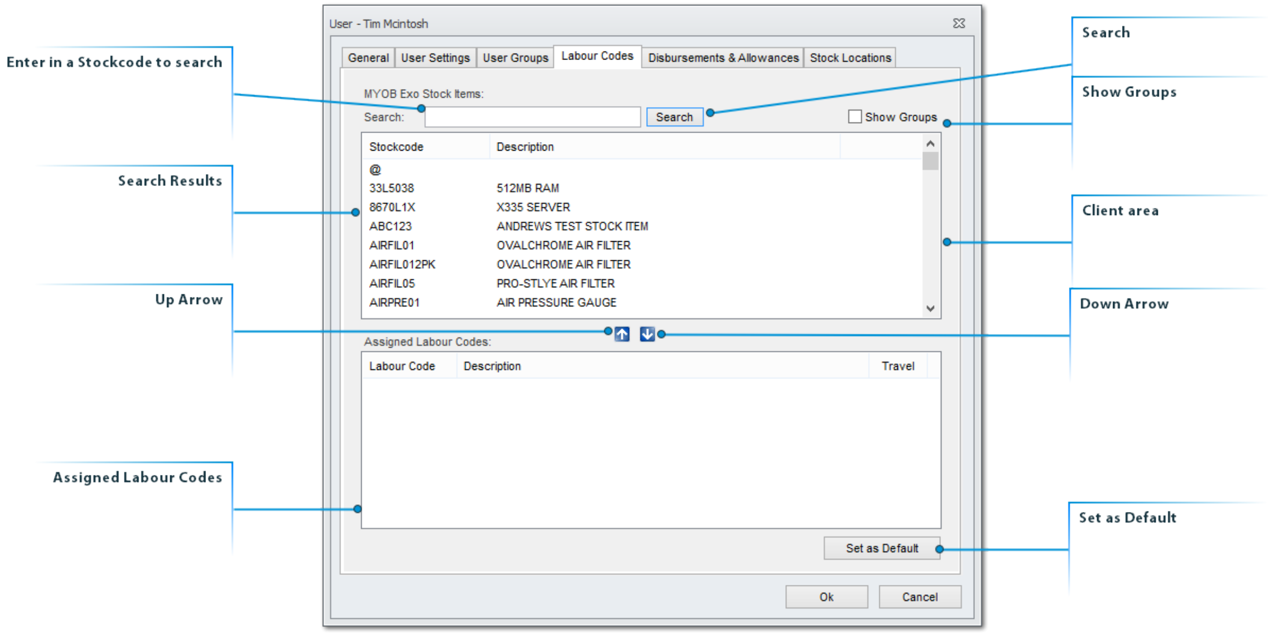


- **Move Item down**
  This assigns the group to the user.

- **Set as Default**
  One group will be required to be set as the default group.
  This flows into the task listing screen and reporting.

User Setup - Labour codes

A user can have more than one labour code. One labour code will need to be the default but others could be codes for when the user works after hours or on a public holiday and you want to charge the client a different rate.



- **Enter in a Stockcode to search**

- **Search**

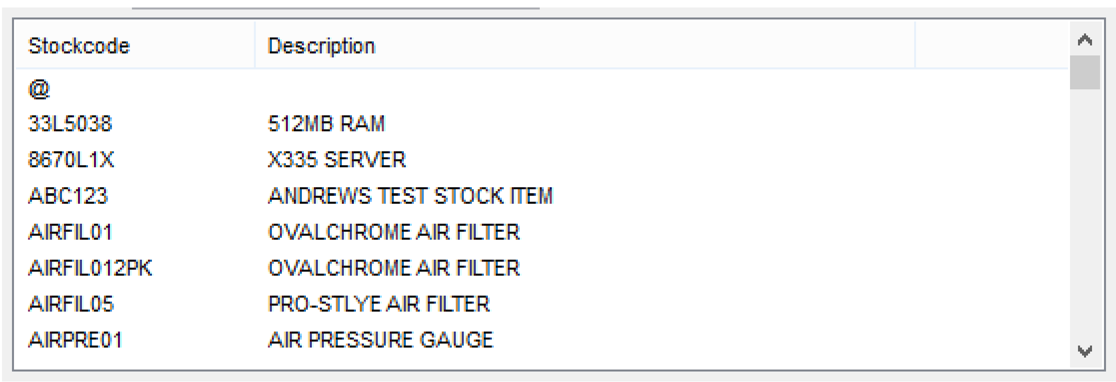
- **Show Groups**

  If '**Show Groups**' is ticked on then the stock items are grouped by the Primary Stock Group.

- **Search Results**

  This screen shows the results of the search, an item can be selected and added to the Assigned Labour Codes screen.

- **Client area**



- **Up Arrow**

  Removes an item from the Assigned Labour Codes list.

- **Down Arrow**

Assigns a stock item to the Assigned Labour Code list so a user can select that labour code when entering in time.

- **Set as Default**

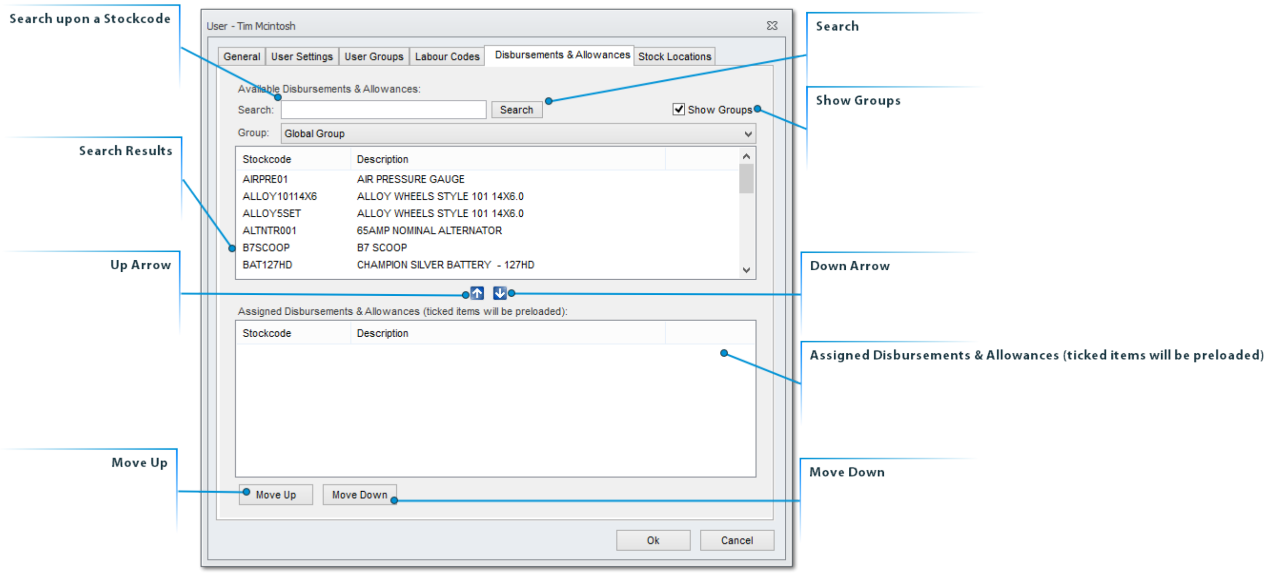
One Labour stockcode **MUST** be set as the default Labour code. Timetrak will use this as the default in a time entry screen.

- **Assigned Labour Codes**

Any items in this list are available to a user to put their time against in both TimeTrak Professional and TimeTrak Mobile.

User Setup - Disbursements & Allowances

Other terms for disbursements is materials or costs that are used on a job. Against a user they might only have one or two specific disbursements and one can be the default. For example each user might have their own travel stockcode and it can be assigned to the user here as their travel they would charge onto a task.



- **Search upon a Stockcode**
  Enter in a stockcode for a disbursement to assign it to a user.

- **Search**
  Click on search to search upon your stockcode or group

- **Show Groups**
  Check this setting to search upon the stock items primary stock group.

- **Search Results**
  In this screen the search results will be displayed and can be selected to assign to the user.

- **Down Arrow**
  Use the down arrow to add an item from the Assigned Disbursements & Allowances list.

- **Up Arrow**
  Use the up arrow to remove an item from the Assigned Disbursements & Allowances list.

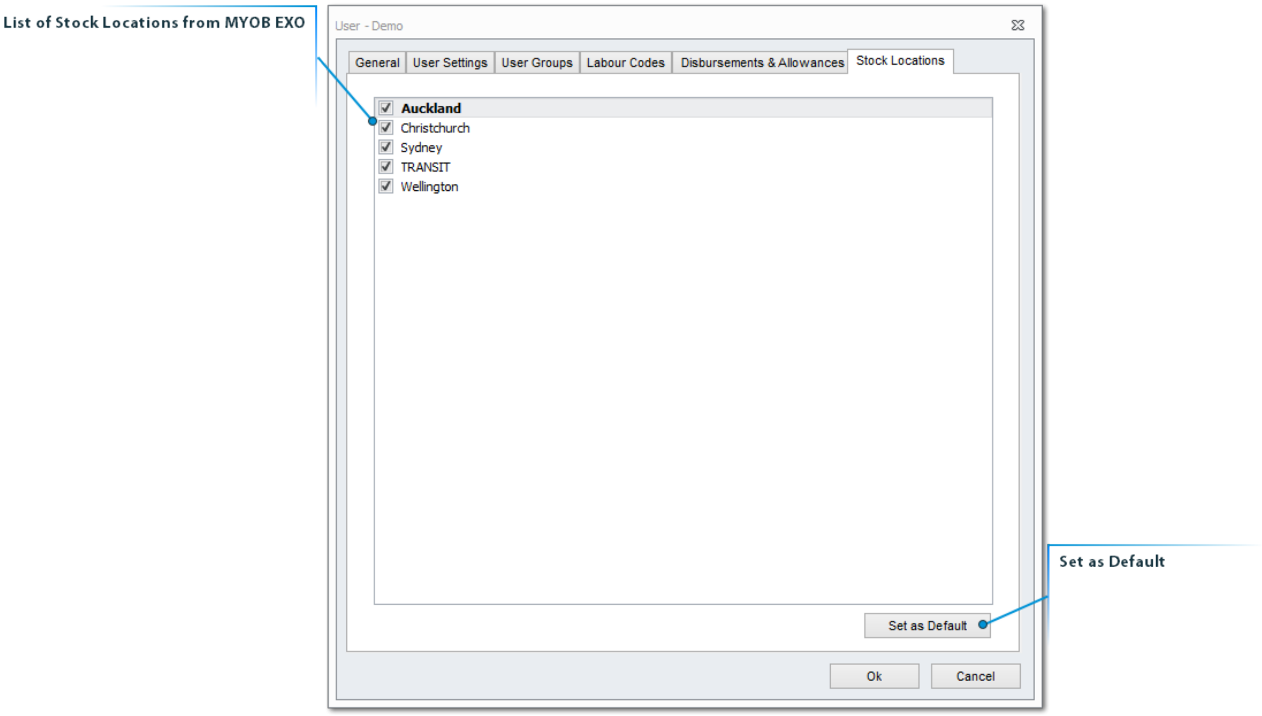
- **Assigned Disbursements & Allowances (ticked items will be preloaded)**
  This will be the list of disbursements assigned to the user.

- **Move Down**
  Move the Disbursement list item down the list.

- **Move Up**
  Move the Disbursement list item up the list.

User Setup - Stock Locations

This setting will assign a default stock location to the user as well as setting up any other location they may be able to pull stock from.
These are MYOB Exo stock locations.



- **List of Stock Locations from MYOB EXO**

- **Set as Default**
  At least one location will need to be the users default stock location.

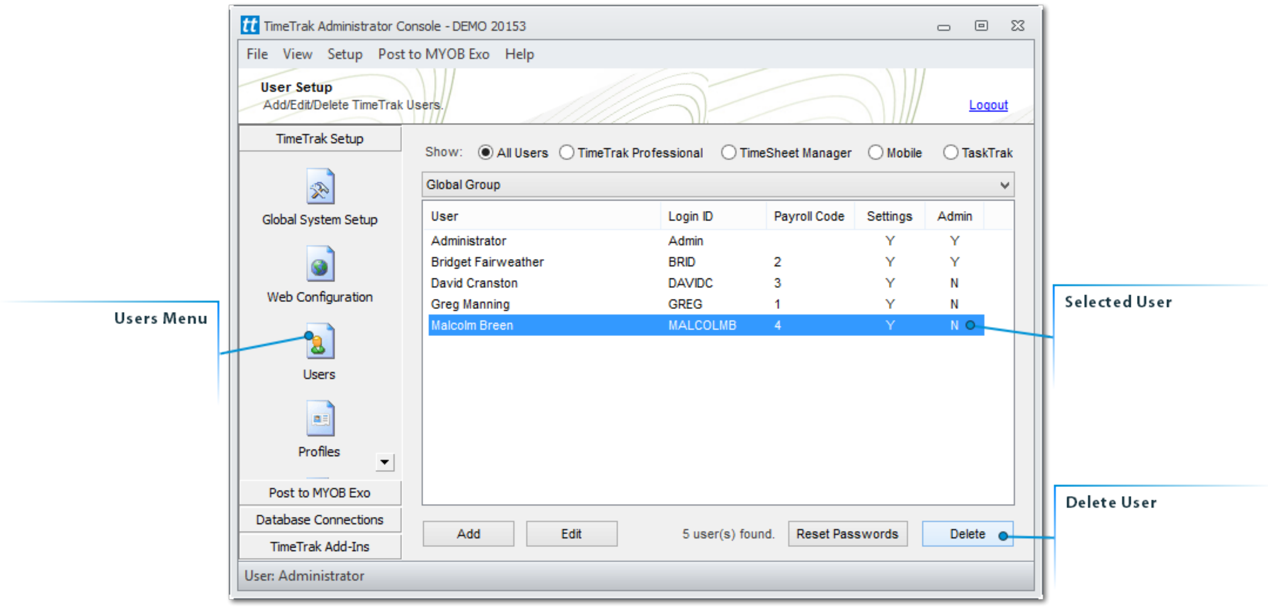
Deleting and Reactivating a User in TimeTrak

When a user is no longer required in TimeTrak they can be deleted.
The deletion action does not actually remove the user from TimeTrak but makes them inactive.

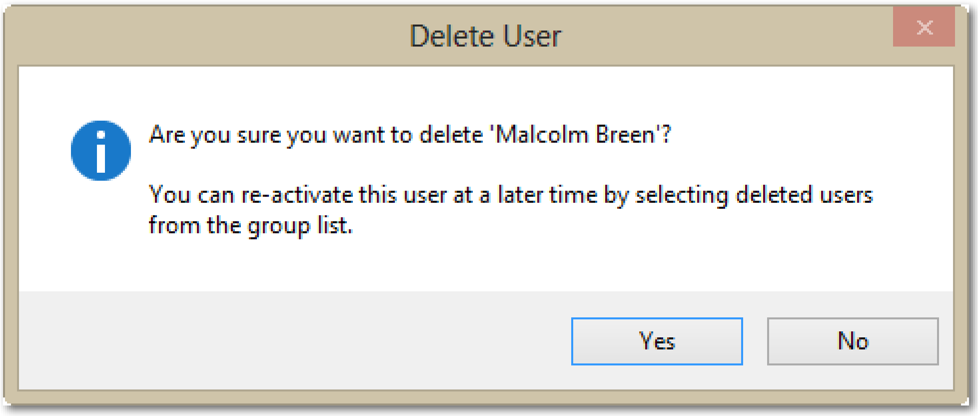
When a user is made inactive the licenses they were assigned against are free to be used for another user.

Please make sure all time entries are posted from TimeTrak into MYOB Exo and that all Non-Billable and Non-Producitve time is locked for the user before you delete them.

In the Users Menu highlight the user to be made inactive.
Click on the Delete Button.

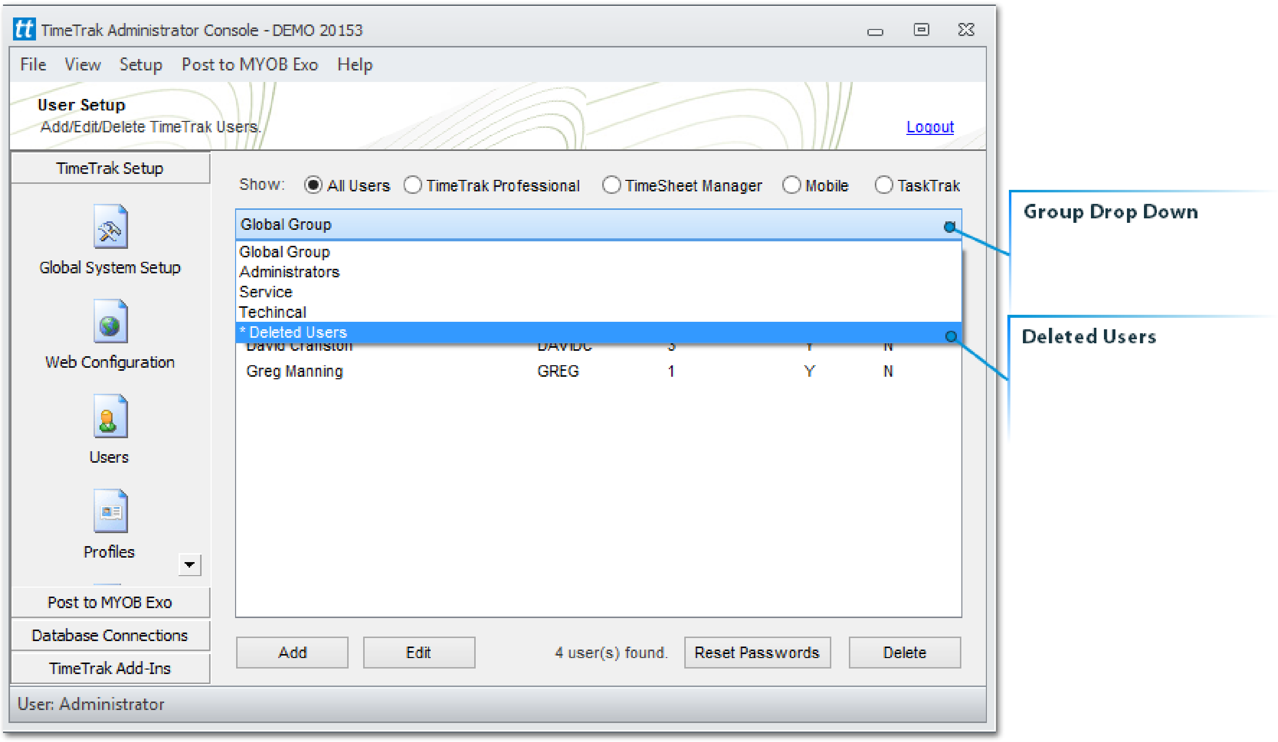


A confirmation screen will come up, select Yes.

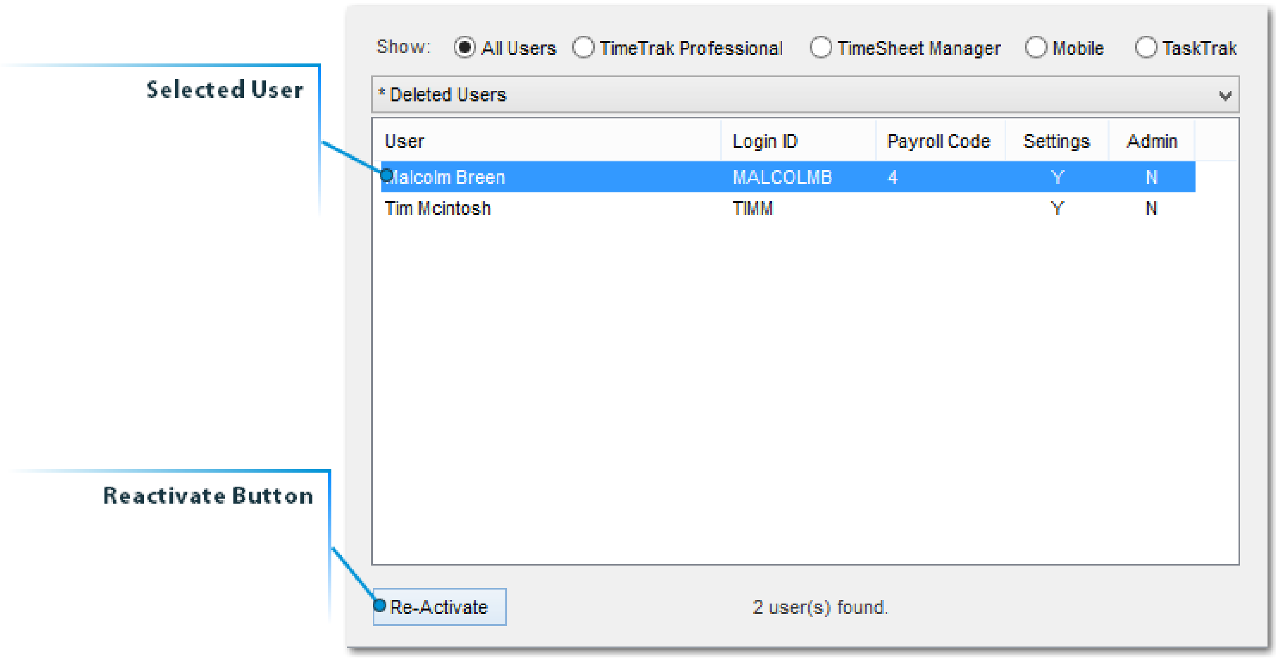


The User will be gone from the active list and the licenses will be free.

To reactive a user who has already been in TimeTrak expand the Group Dropdown and select Deleted Users.



Select the user to be reactivated and click on the Reactivate button.



This will put the user back into the active list and they will use up the same licensing they had when they were deleted.

Exosoft Support

Thank you for your upgrade of TimeTrak Professional.

If you have any questions or concerns please contact a team member at
Focus by either emailing **support@exosoft.net.nz**
or for urgent support please email and then call

NZ - 0800 12 00 99
Australia - 1800 60 80 77