Kaseya

Time Tracking

User Guide

Version R9

English

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Agreement

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Contents

Time Tracking Overview

Time Tracking enables users to record how they use their time, both inside and outside of the Kaseya application.

- Timesheets are the main records used to track users' time. Time entries within a timesheet integrate with other functions in the VSA, depending on their work type: administrative tasks, work orders, service desk tickets, or project tasks. You can also export timesheets for billing purposes outside of the VSA.
- Timers provide an easy way of creating time entries. Users can start and stop one or more **timers** *(page 9)* and generate time entries for the elapsed times. Timers don't have to turn off when you log out of the VSA. You can log back in several hours later and apply the elapsed time then, up to a maximum of 24 hours.
- My Timesheets - Your own timesheets are accessed using Time Tracking > **My Timesheets** *(page 3)*.
- Approved Timesheets - Timesheets are approved using Time Tracking > **Approve Timesheets** *(page 6)*. Approved timesheets can be unapproved using **Timesheet Summary** *(page 6)*.
- Time Tracking Reports - See the Timesheet Summary and Timesheet Entries reports in Info Center > Reports.

> Note: See **Time Tracking** *(page 2)* configuration options.

Functions	Description
Dashboard *(page 3)*	Provides a dashboard view of Time Tracking alerts.
My Timesheets *(page 3)*	Tracks your time using timesheets. Timesheets can be saved, submitted for approval or exported to Excel spreadsheet.
Approve Timesheets *(page 6)*	Approves, rejects or voids submitted timesheets.
Unprocessed Transactions *(page 7)*	Displays unprocessed time entries.
Timesheet Summary *(page 6)*	Provides a summary of the status of all timesheet periods.
Timers *(page 9)*	Records elapsed time and applies it to timesheets and other work type records.
Periods *(page 14)*	Creates a series of time periods.
Administrative Tasks *(page 15)*	Defines tasks representing recurring operational activities, unassociated with specific projects.
Approval Patterns *(page 15)*	Defines one-step or two-step approvals patterns. Two types of approvers can approve a timesheet:

Time Tracking Module Requirements

Kaseya Server

- The Time Tracking R9 module requires VSA R9.

> Note: See general **System Requirements**
> *(http://help.kaseya.com/WebHelp/EN/VSA/9000000/reqs/index.asp#home.htm)*.

Configuring Time Tracking

Configuring Timesheets and Automatic Approvals

- Disable **Use the Timesheet feature for time entry approval** using Time Tracking > **Settings** *(page 13)*.
- Create and activate *a series of time periods* using **Periods** *(page 14)*. A time period must be *active* to display a timesheet for that period in **My Timesheets**.
- Activate or close individual time periods using Time Tracking > **Timesheet Summary** *(page 6)*. You can also use this page to review all timesheets by period and by their status: pending, submitted, approved, or voided.
- Link VSA user records to staff records within an organization using System > Orgs/Groups/Depts/Staff > Manage > Staff. This is done automatically when a new VSA user is created.

Manually Approving   Timesheets

To approve timesheets *manually using one or two approvers*, the following configuration steps are required:

- Enable **Use the Timesheet feature for time entry approval** using Time Tracking > **Settings** *(page 13)*.
- Define and *activate* at least one approval pattern using Time Tracking > **Approval Patterns** *(page 15)*.
- Link VSA user records to staff records within an organization using System > Orgs/Groups/Depts/Staff > Manage > Staff. This applies to both VSA users being approved and VSA users acting as approvers. Using this same tab:
  - ➤ Link staff records whose timesheets require approval to an activated approval pattern using System > Orgs/Groups/Depts/Staff > Manage > Staff.
  - ➤ Ensure the staff record being approved is assigned the supervisor acting as the approver.
  - ➤ If the approval pattern specifies two approvers, ensure the supervisor acting as the *first* approver is assigned the supervisor acting as the *second* approver.

  > Note: Approvers can only approve timesheets in their own organization. Approvers can be in different scopes and roles from the users submitting timesheets to them.

- Using this same page you can optionally enable a staff member, by exception, with the ability to approve any timesheet in his or her organization. This ensures all timesheets can be approved in a timely manner, if other approvers are temporarily unavailable.

  > Note: Timesheets are auto-approved if a staff record does not specify an approval pattern and a supervisor.

Once timesheet approvals are configured, submitted timesheets display in the approver's Time Tracking > **Approve Timesheets** *(page 6)* page after timesheets are submitted to them. The approver can approve, reject or void the submitted timesheet. Approved timesheets can be unapproved using **Timesheet Summary** *(page 6)*.

Configuring Timers

- Ensure **Show Session Timer** is enabled by user role, using System > User Roles > Access Rights.
- Enable **Timer Sessions** using Time Tracking > **Settings** *(page 13)*.
  - ➤ Check **Show session timers at the header**.

> ➢ Optionally check **Allow multiple session timers running at the same time**.

> Note: Timers can be used to create time entries even if Show Timesheets is disabled.

- Link VSA user records to staff members records within an organization using System > Orgs/Groups/Depts/Staff > Manage > Staff.

> Note: VSA user logons are typically associated with staff member records in the myOrg organization.

Dashboard

Time Tracking > Summary > Dashboard

The **Dashboard** page provides a dashboard view of **Time Tracking** alerts. Types of system generated alerts include:

- No active period exists.
- The active period has expired.

My Timesheets

Time Tracking > My Timesheets

The **TimeSheets** page enables you to track your time using timesheets. Each timesheet represents a different time period. Timesheets can be saved, submitted for **approval** *(page 6)* or exported to Excel spreadsheet.

Time entries can be created manually, or you can use **timers** *(page 9)* to record elapsed time and apply that time to your current spreadsheet.

> Note: Only timesheets for the current date and earlier display in **My Timesheets** *(page 3)* and **Approve Timesheets** *(page 6)*.
>
> Note: See **Time Tracking** *(page 2)* configuration options.

Work Types

Work types determine how time entries are integrated with other functions in the VSA. The work type options displayed in your VSA depend on the modules installed.

- **Admin Tasks** - A recurring operational activity not associated with any project.
- **Work Orders** - Only displays if the **Service Billing** is installed.
- **Service Desk Tickets** - Only displays if **Service Desk** 1.3 or later is installed.

Actions

- **Period** - Selects a timesheet period to display.
- **Add Entry** - Creates a timesheet entry in the displayed timesheet.
    - ➢ **Creating an Administrator Task Timesheet Entry** *(page 4)*
    - ➢ **Creating a Customer / Work Order Timesheet Entry** *(page 4)*
    - ➢ **Creating a Service Desk Ticket Timesheet Entry** *(page 5)*
- **Change Work Type** - Changes a selected entry in the displayed timesheet into one of the three work types listed above.
- **Save** - Saves the displayed timesheet.

- **Submit** - Submits a displayed timesheet for approval. Submitted timesheets cannot be edited. Timesheets cannot be submitted before the end of the period.

Columns

This table supports selectable columns, column sorting, column filtering and flexible columns widths. In addition you can select a column heading to group by.

Entering Time

For any activity row that already exists, select a cell and enter the number of hours.

Creating an Administrator Task Timesheet Entry

Create an **Admin Task** timesheet entry to track time for **recurring operational activities** *(page 15)* unassociated with specific projects or with **Service Billing** or with **Service Desk**.

1. Select a timesheet using Time Tracking > **My Timesheets**.
2. Add a new entry to the timesheet by clicking **Add Entry**. The **New Timesheet Entry** dialog displays.
3. Enter a date and time for the timesheet entry.
4. Select the **Admin Task** work type option.
5. Select the **Task Name** that best describes the time you are recording. Tasks display in the **Ref 1** column of the timesheet.
6. **Reference** - Enter a free-form reference. Example: Customer PO number. References display in the **Ref 2** column of the timesheet.
7. Optionally add a **Note**.
8. Click **Save** to close this dialog. The new entry displays in the timesheet.
9. Click **Save** to save your changes to the timesheet.

Creating a Customer / Work Order Timesheet Entry

Create a **Customer / Work Order** timesheet entry to direct the time entered to **Service Billing**. **Service Billing** time entries can be billed to the customer.

1. Select a timesheet using Time Tracking > **My Timesheets**.
2. Add a new entry to the timesheet by clicking **Add Entry**. The **New Timesheet Entry** dialog displays.
3. Enter a date and time for the timesheet entry.
4. Select the **Customer / Work Order** work type option.
5. Select a **Customer**. The customer displays in the **Ref 1** column of the timesheet.
6. Select the **Work Order**. The work order displays in the **Ref 2** column of the timesheet.
7. Select the **Task Name**. The **Task Name** is the work order item you want to enter entry detail for.
8. Optionally add a **Note**.
9. Optionally check the **Show Note on Invoice** checkbox.
10. Classify this entry by **Activity Type**. The activity type displays in the **Activity** column of the timesheet.
11. Ensure the **Billable** checkbox is checked if you want to bill for this activity.
12. Click **Save** to close this dialog. The new entry displays in the timesheet.

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13. Click **Save** to save your changes to the timesheet.
14. The entry you created will be eligible for billing once the timesheet is submitted and approved.

Creating a Service Desk Ticket Timesheet Entry

Create a **Service Desk Ticket** timesheet entry to add the time to the entire **Service Desk** ticket. You can optionally link the ticket to **Service Billing** records or to a task, if either one of these features is enabled. Time entered displays as a note in the ticket.

1. Select a timesheet using Time Tracking > **My Timesheets**.
2. Add a new entry to the timesheet by clicking **Add Entry**. The **New Timesheet Entry** dialog displays.
3. Enter a date and time for the timesheet entry.
4. Select the **Service Desk Ticket** work type option.
5. Select the **Service Desk** definition.
6. Optionally select a **Status Filter** to limit the list of tickets displayed in the **Ticket** drop-down list.display.
7. Select either:
   - ➢ **Show All Tickets**
   - ➢ **Show My Tickets**
8. Select a **Ticket**.
9. The following fields display only if the **Service Billing** is installed and integrated with **Service Desk**. See Creating Billing Entries using Service Desk.
   - ➢ **Work Order** - Display only. Displays only if a work order is associated with the ticket on the General tab of the ticket editor.
   - ➢ **Work Order Item** - The work order line to associate with the hours worked. Displays only if a work order is associated with the ticket on the General tab of the ticket editor.
   - ➢ **Activity Type** - Labor entries are grouped by **activity type** to analyze the cost and revenue of labor. The classification of activity types typically reflects the accounting requirements of a company. Labor entries are classified by both activity type and resource type. Not editable if a detailed work order is selected.
   - ➢ **Resource Type** - A **resource type** specifies a *skill*, *material* or *cost* and sets a default rate for a billable labor item or entry. Typically a resource type represents a skill performed by a staff member. A billing rate and standard cost is defined for each *skill* required to perform the service. The rate can be overridden when selected. Because the labor performed to deliver a service sometimes requires incidental charges for materials and costs, resource types can also be classified as either *material* or *cost*. For example, extra cabling or overnight shipping might be included as additional, billable labor entries, because they are required to deliver the service of installing a server. The classification of resource types typically reflects the production requirements of a company. Labor entries are classified by both resource type and by activity type. Not editable if a detailed work order is selected.
   - ➢ **Rate** - The default billing rate for the selected resource type. Display only.
   - ➢ **Override Rate** - A manually entered rate that overrides the default billing rate for a selected resource type. Does not display if a detailed work order is selected.
   - ➢ **Show Note on Invoice** - If checked, the note is displayed on the printed invoice.
10. Select a **Task**. This field only displays if Tasks are enabled for the service desk.
11. Optionally add a **Note**.
12. Optionally make the note a **Hidden Note** in the ticket.

13. Billable - If checked, the entry is billable. If **Service Billing** is not installed, the Billable checkbox is for reference purposes only. If **Service Billing** is installed the entry is forwarded to **Service Billing**. If timesheets require approval, the timesheet containing this entry must be approved before the entry is forwarded to **Service Billing**.
14. Click **Save** to close this dialog. The new entry displays in the timesheet.
15. Click **Save** to save your changes to the timesheet.

Approve Timesheets

Time Tracking > Approve Timesheets

The Approve Timesheets page approves timesheets submitted by VSA users to them using **My Timesheets** *(page 3)*. Approvers can approve, reject or void a timesheet. Clicking the hyperlink underneath a name in the **Staff** column displays the details of that timesheet.

> Note: Only timesheets for the current date and earlier display in **My Timesheets** *(page 3)* and **Approve Timesheets** *(page 6)*.
>
> Note: See **Time Tracking** *(page 2)* configuration options.

Actions

- Approve - Approves selected timesheets. Approved timesheets can be unapproved using **Timesheet Summary** *(page 6)*.

  > Note: If timesheets require approval, a time entry is not forwarded to **Service Billing** until the timesheet is approved.

- Reject - Rejects selected timesheets, returning them for correction to their timesheet submitters in **My Timesheets**.
- Void - Prevents selected timesheets and their time entries from being processed any further throughout the system.

Timesheet Summary

Time Tracking > Timesheet Summary

The Timesheet Summary page provides a summary of the status of all timesheet periods. Activating a timesheet period enables all VSA users to access that timesheet period in Time Tracking > **My Timesheets** *(page 3)* and Time Tracking > **Approve Timesheets** *(page 6)*.

Unapproving Timesheets

A timesheet approval can be unapproved if an invoice has not been generated in **Service Billing**. If there no **Service Billing** item is in the timesheet, unapproving timesheets is allowed. You must click a link in the **Approved** cell of the **Timesheet Summary** *(page 6)* page to access the **Unapprove Timesheet** button.

Actions

- Close Period - Close a selected timesheet period, preventing further changes to timesheets in that period.
- Activate Period - Activate a selected timesheet period, enabling changes to timesheets in that period.

Column Headings

Clicking any number in one of the cells of the table grid displays a secondary window listing the status of each timesheet in that state and time period.

- **Period** - The date range of a timesheet period.
- **Status** - Indicates the timesheet period is either `Active` or `Closed`.
- **Pending** - The number of timesheets being updated by users in this period, before being submitted.
- **Submitted** - The number of timesheets submitted in this period, before being approved.
- **Approved** - The number of timesheets approved in this period. Click a linked cell in this column to access the **Unapprove Timesheet** button.
- **Voided** - The number of timesheets voided in this period.

Unprocessed Transactions

`Time Tracking > Unprocessed Transactions`

The **Unprocessed Transactions** page displays unprocessed time entries. Normally time entries created in another module are processed by **Time Tracking** immediately and display in the appropriate timesheet. Types of errors that can prevent a time entry from being processed immediately include:

- `No valid period found`
- `Timesheet status was approved`
- `Timesheet status was submitted`
- `Period status is not active`
- `Error`

Once the condition preventing processing has been corrected, you can resubmit the transaction for processing.

Actions

- **Resubmit** - Resubmits selected unprocessed transactions.
- **Delete** - Deletes selected unprocessed transactions.
- **Move** - Moves selected unprocessed transactions from the previous time period to the current time period. Moved entries adopt the current time, day and date of the current time period.
- **Refresh** - Refreshes the page.

Table Columns

- **Customer Name** - The name of the organization.
- **Staff** - The staff record name.
- **Reason** - A description of the time activity.
- **Log Message** - The type of error preventing the transaction from being processed.
- **Date** - The date of the time entry
- **Ref 1** - The name of the task.
- **Hours** - The duration of the time entry.
- **Reference** - Create a filterable, sortable reference to this task in table views and reports. References display in the **Ref 2** column on this page.
- **Billable** - If checked, this time entry is billable.

Application Logging

`Time Tracking > Application Logging`

The **Application Logging** page displays a log of **Time Tracking** module activity by:

- **Event ID**
- **Event Name**
- **Message**
- **Admin**
- **Event Date**

This table supports selectable columns, column sorting, column filtering and flexible columns widths.

Timesheet History (Summary)

`Time Tracking > Timesheet History (Summary)`

The **Timesheet History (Summary)** page provides summary of all time entries in a tabular view. The table displays a single row for each unique combination of **User**, **Date**, **Work Type**, **Ref 1** and **Ref 2**.

Columns of data for each time sheet entry include:

- **Status** - `New`, `Approved`, `Submitted`, `Void`
- **User** - The staff record name.
- **Work Type** - `Admin Task`, `Work Order`, `Service Desk Ticket`, `Project Task`.
- **Ref 1** - The name of the task.
- **Ref 2** - A free-form reference. Example: Customer PO number.
- **Activity** - A description of the time activity you are recording.
- **Billable** - If checked, this time entry is billable.
- **Time Period** - The time period of the time entry.
- **Date** - The date of the time entry
- **Hours** - The total number of hours entered for duration of the time entry.

This table supports selectable columns, column sorting, column filtering and flexible columns widths.

Timesheet History (Details)

`Time Tracking > Timesheet History (Details)`

The **Timesheet History (Details)** page provides all time entries in a tabular view. Columns of data for each time sheet entry include:

- **Status** - `New`, `Approved`, `Submitted`, `Void`
- **User** - The staff record name.
- **Work Type** - `Admin Task`, `Work Order`, `Service Desk Ticket`, `Project Task`.
- **Ref 1** - The name of the task.
- **Ref 2** - A free-form reference. Example: Customer PO number.
- **Activity** - A description of the time activity you are recording.
- **Billable** - If checked, this time entry is billable.
- **Note** - Additional text, if appropriate, describing this time entry.
- **Time Period** - The time period of the time entry.
- **Date** - The date of the time entry

> ▪ **Hours** - The duration of the time entry.

This table supports selectable columns, column sorting, column filtering and flexible columns widths.

Timers

A timer control panel displays in the upper right hand corner of the VSA, just below the Role/Scope Selector.

🕐 00:00:00 | No Timer Running |

Timers enable you to record the time you take to perform a task. Then you can add the elapsed time as a timesheet entry. You can run multiple timers concurrently. The entries you create display in the Time Tracking > **My Timesheets** *(page 3)* page.

Timers don't have to turn off when you log out of the VSA. You can log back in several hours later and apply the elapsed time then.

Note: See **Time Tracking** *(page 2)* configuration options.

Adding a Timer

Timer entries can be applied using the following work types:

▪ **Creating an Administrator Task Timer Entry** *(page 10)*
▪ **Creating a Customer / Work Order Timer Entry** *(page 10)*
▪ **Creating a Service Desk Ticket Timer Entry** *(page 11)*

Working with Timers

Once a timer is added, a selected timer in the timer bar displays the color and name of the timer. When a timer is running, the **Pause** button displays. When a timer stops, the **Play** button displays. You can run multiple timers if this is enabled in Time Tracking > **Settings** *(page 13)*.

Timer Action Buttons

Hovering the mouse cursor over a specific timer activates the action buttons for that timer.

🕐 ⏸ 00:01:10 | Support |
✔ ⏮ ✖ 00:01:10 | Suppo | ▾ |
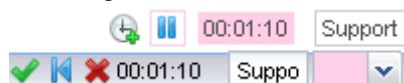
▪ The timer's color, label and elapsed time are displayed.
▪ Both the label field and the color field are editable.
▪ Click the Checkmark ✔ icon to display the **Apply Time** window. You can edit your time entry, including the elapsed time, and either:
  ➢ **Apply and Remove** - Apply your time entry to your timesheet and remove the timer.
  ➢ **Apply and Reset** - Apply your time entry to your timesheet and reset the timer to 0.
▪ Ctrl+click the Checkmark ✔ icon to apply your elapsed time to your timesheet immediately, in the cell for today's date. You can edit the time entry later using Time Tracking > **My Timesheets** *(page 3)*.
▪ The Reset Timer ⏮ icon resets the eclipsed time back to 0.
▪ The Remove Timer ✖ icon removes the timer without applying elapsed time to your spreadsheet.

Add Time Action Buttons

Hovering the mouse cursor over the **New Timer** icon timer activates the action buttons for that icon.

3 Timers Running

Pause All   Delete All
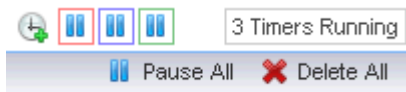
- Click **New Timer** to create a new timer.
- Click **Pause All** to stop all timers at once.
- Click **Delete All** to remove all timers.

Creating an Administrator Task Timer Entry

Create an **Admin Task** timer entry to track time for **recurring operational activities** *(page 15)* unassociated with specific projects or with **Service Billing** or with **Service Desk**.

1. Click the new timer icon to add a new timer. Timers are located in the upper right hand corner of the VSA window. The **New Timer** dialog displays. Enter or select values for the following fields.
2. Select a unique **Timer Color**. You can define multiple timers concurrently so it helps to assigned them different colors.
3. Enter a **Label** for your timer. The label displays whenever the timer icon is selected and added as a note to any time entry you create from the timer. If blank, the timer is labeled by the work type you select.
4. If **Start of Save** is checked, the time starts running as soon as you save this dialog.
5. Select the **Admin Task** work type option.
6. Select the **Task Name** that best describes the time you are recording. Tasks display in the **Ref 1** column of a timesheet.
7. **Reference** - Enter a free-form reference. Example: Customer PO number. References display in the **Ref 2** column of a timesheet.
8. Optionally add a **Note**.
9. Click **Save** to close this dialog. The new timer clocks begins recording the time for this activity.
10. Complete the activity being timed by this timer.
11. Click the Checkmark icon. You can edit your time entry, including the elapsed time, and either:
    - ➢ **Apply and Remove** - Apply your time entry to your timesheet and remove the timer.
    - ➢ **Apply and Reset** - Apply your time entry to your timesheet and reset the timer to 0.
12. The entry you created will be eligible for billing once the timesheet is submitted and approved.

Creating a Customer / Work Order Timer Entry

Create a **Customer / Work Order** timer entry to direct the time entered to **Service Billing**. **Service Billing** time entries can be billed to the customer.

1. Click the new timer icon to add a new timer. Timers are located in the upper right hand corner of the VSA window. The **New Timer** dialog displays. Enter or select values for the following fields.
2. Select a unique **Timer Color**. You can define multiple timers concurrently so it helps to assigned them different colors.

3. Enter a **Label** for your timer. The label displays whenever the timer icon is selected and added as a note to any time entry you create from the timer. If blank, the timer is labeled by the work type you select.

4. If **Start of Save** is checked, the time starts running as soon as you save this dialog.

5. Select the **Customer / Work Order** work type option.

6. Select a **Customer**, **Work Order** and **Task Name**. The **Task Name** is the work order item you want to enter entry detail for.

7. Optionally add a **Note**.

8. Optionally check the **Show Note on Invoice** checkbox.

9. Enter a **Resource** type. Not editable if a detailed work order is selected. A **resource type** specifies a *skill*, *material* or *cost* and sets a default rate for a billable labor item or entry. Typically a resource type represents a skill performed by a staff member. A billing rate and standard cost is defined for each *skill* required to perform the service. The rate can be overridden when selected. Because the labor performed to deliver a service sometimes requires incidental charges for materials and costs, resource types can also be classified as either *material* or *cost*. For example, extra cabling or overnight shipping might be included as additional, billable labor entries, because they are required to deliver the service of installing a server. The classification of resource types typically reflects the production requirements of a company. Labor entries are classified by both resource type and by activity type.

10. Classify this entry by **Activity Type**. Not editable if a detailed work order is selected. Labor entries are grouped by **activity type** to analyze the cost and revenue of labor. The classification of activity types typically reflects the accounting requirements of a company. Labor entries are classified by both activity type and resource type.

11. The **Rate** is display only. The default billing rate for the selected resource type.

12. Optionally check the **Override Rate** checkbox to enter a **New Rate**. Does not display if a detailed work order is selected.

13. Ensure the **Billable** checkbox is checked if you want to bill for this activity.

14. Click **Save** to close this dialog. The new timer clocks begins recording the time for this activity.

15. Complete the activity being timed by this timer.

16. Click the Checkmark ✔ icon to display the **Apply Time** window. You can edit your time entry, including the elapsed time, and either:

   ➢ **Apply and Remove** - Apply your time entry to your timesheet and remove the timer.

   ➢ **Apply and Reset** - Apply your time entry to your timesheet and reset the timer to 0.

17. The entry you created will be eligible for billing once the timesheet is submitted and approved.

Creating a Service Desk Ticket and Service Billing Timer Entry

Create a **Service Desk Ticket** timer entry to add the time to the entire **Service Desk** ticket. You can optionally link the ticket to **Service Billing** records or to a task, if either one of these features is enabled. Time entered displays as a note in the ticket.

1. Click the new timer 🕒 icon to add a new timer. Timers are located in the upper right hand corner of the VSA window. The **New Timer** dialog displays. Enter or select values for the following fields.

2. Select a unique **Timer Color**. You can define multiple timers concurrently so it helps to assign them different colors.

3. Enter a **Label** for your timer. The label displays whenever the timer icon is selected and added as a note to any time entry you create from the timer. If blank, the timer is labeled by the work type you select.

4. If **Start of Save** is checked, the time starts running as soon as you save this dialog.

5. Select the **Service Desk Ticket** work type option.

6. Select the **Service Desk** definition.

7. Optionally select a **Status Filter** to limit the list of tickets displayed in the **Ticket** drop-down list.

8. Select either:

   ➢ **Show All Tickets**

   ➢ **Show My Tickets**

9. Select a **Ticket**.

10. The following fields only display if a service desk is integrated with **Service Billing**. See Creating Billing Entries using Service Desk.

    ➢ **Work Order** - Display only. Displays only if a work order is associated with the ticket on the General tab of the ticket editor.

    ➢ **Work Order Item** - The work order line to associate with the hours worked. Displays only if a work order is associated with the ticket on the General tab of the ticket editor.

    ➢ **Activity Type** - Labor entries are grouped by **activity type** to analyze the cost and revenue of labor. The classification of activity types typically reflects the accounting requirements of a company. Labor entries are classified by both activity type and resource type.   Not editable if a detailed work order is selected.

    ➢ **Resource Type** - A **resource type** specifies a *skill*, *material* or *cost* and sets a default rate for a billable labor item or entry. Typically a resource type represents a skill performed by a staff member. A billing rate and standard cost is defined for each *skill* required to perform the service. The rate can be overridden when selected. Because the labor performed to deliver a service sometimes requires incidental charges for materials and costs, resource types can also be classified as either *material* or *cost*. For example, extra cabling or overnight shipping might be included as additional, billable labor entries, because they are required to deliver the service of installing a server. The classification of resource types typically reflects the production requirements of a company. Labor entries are classified by both resource type and by activity type. Not editable if a detailed work order is selected.

    ➢ **Rate** - The default billing rate for the selected resource type. Display only.

    ➢ **Override Rate** - A manually entered rate that overrides the default billing rate for a selected resource type. Does not display if a detailed work order is selected.

    ➢ **Show Note on Invoice** - If checked, the note is displayed on the printed invoice.

11. Select a **Task**. This field only displays if Tasks are enabled for the service desk.

12. Optionally add a **Note**.

13. Optionally make the note a **Hidden Note** in the ticket.

14. **Billable** - If checked, the entry is billable. If **Service Billing** is not installed, the **Billable** checkbox is for reference purposes only. If **Service Billing** is installed the entry is forwarded to **Service Billing**. If timesheets require approval, the timesheet containing this entry must be approved before the entry is forwarded to **Service Billing**.

15. Click **Save** to close this dialog. The new timer clocks begins recording the time for this activity.

16. Complete the activity being timed by this timer.

17. Click the Checkmark ✔ icon to display the **Apply Time** window. You can edit your time entry, including the elapsed time, and either:

    ➢ **Apply and Remove** - Apply your time entry to your timesheet and remove the timer.

    ➢ **Apply and Reset** - Apply your time entry to your timesheet and reset the timer to 0.

Creating a Service Desk Ticket or Ticket/Task Timer Entry

Create a **Service Desk Ticket** timer entry to add the time to either the entire **Service Desk** ticket or to a task within a ticket. Time entered displays as a note in the ticket.

1. Click the new timer ⊕ icon to add a new timer. Timers are located in the upper right hand corner of the VSA window. The **New Timer** dialog displays. Enter or select values for the following fields.
2. Select a unique **Timer Color**. You can define multiple timers concurrently so it helps to assigned them different colors.
3. Enter a **Label** for your timer. The label displays whenever the timer icon is selected and added as a note to any time entry you create from the timer. If blank, the timer is labeled by the work type you select.
4. If **Start of Save** is checked, the time starts running as soon as you save this dialog.
5. Select the **Service Desk Ticket** work type option.
6. Select the **Service Desk** definition.
7. Optionally select a **Status Filter** to limit the list of tickets displayed in the **Ticket** drop-down list.
8. Select either:
   - ➢ **Show All Tickets**
   - ➢ **Show My Tickets**
9. Select a **Ticket**.
10. Select a **Task**. This field only displays if the Task Functionality feature is enabled in **Service Desk**.
11. Optionally add a **Note**.
12. Optionally make the note a **Hidden Note** in the ticket.
13. **Billable** - If checked, the entry is billable. If **Service Billing** is not installed, the **Billable** checkbox is for reference purposes only. If **Service Billing** is installed the entry is forwarded to **Service Billing**. If timesheets require approval, the timesheet containing this entry must be approved before the entry is forwarded to **Service Billing**.
14. Click **Save** to close this dialog. The new timer clocks begins recording the time for this activity.
15. Complete the activity being timed by this timer.
16. Click the Checkmark ✔ icon to display the **Apply Time** window. You can edit your time entry, including the elapsed time, and either:
    - ➢ **Apply and Remove** - Apply your time entry to your timesheet and remove the timer.
    - ➢ **Apply and Reset** - Apply your time entry to your timesheet and reset the timer to 0.

Settings

Time Tracking > Settings

Time Tracking

- **Use the Timesheet feature for time entry approval** - If checked, timesheets are manually approved using Time Tracking > **Approve Timesheets** *(page 6)*. If blank, timesheets are automatically approved.

  > Note: Timesheets are also auto-approved if a staff record does not specify an approval pattern and a supervisor.

> Note: See **Time Tracking** *(page 2)* configuration options.

Billing

- **Submit Time Entry Data to Service Billing** - Only displays if **Service Billing** is installed. If checked, time entries created using **My Timesheets** *(page 3)* or **timers** *(page 9)* can be passed to **Service Billing** and billed. If timesheets require approval, a time entry is not forwarded to **Service Billing** until the timesheet is approved.

Session Timers

- **Show session timers at the header** - If checked, timers displays in the header of the VSA.
- **Allow multiple session timers running at the same time** - If **Show session timers** is checked, enable or disable running multiple sessions at the same time.

> Note: See **Time Tracking** *(page 2)* configuration options.

Periods

Time Tracking > Periods

The **Periods** page defines *a series of time periods.* Each **Periods** record specifies a start date, duration and standard calendar unit of time—weekly or monthly, for example. These values are used to create a series of time periods.

Only one **Periods** record can be activated at any one time. Activating a **Periods** record enables time entries to be applied to its time periods. All generated time periods are active by default. You can use Time Tracking > **Timesheet Summary** *(page 6)* to close a time period.

If **timesheets** and **timers** are enabled using Time Tracking > **Settings** *(page 13)*, then these features can be used to create and maintain time entries for an active time period.

Generally, this function only needs to be run once a year, to create one or two more years of timesheets.

> Note: Only timesheets for the current date and earlier display in **My Timesheets** *(page 3)* and **Approve Timesheets** *(page 6)*.
>
> Note: See **Time Tracking** *(page 2)* configuration options.

Actions

- **New** - Create a periods record.
- **Edit** - Edit a selected periods record.
- **Activate** - Activate a selected periods record.
- **Deactivate** - Deactivate a selected periods record.
- **View Periods** - View the time periods of a selected periods record.
- **Delete** - Deletes a selected time period. Only periods without time entries can be deleted.

Adding or Editing a Time Period

- **Name** - Enter a name for the periods record.
- **Schedule** - Enter a calendar period.
- **Purpose** - `Billing` or `Timesheet`. Reference only.
- **Starting Date** - The start date to begin generating time periods.

> **Note:** The start date also determines the *first day of the week* when timesheets are displayed.

- **Creation Period** - The length of time to create time periods for.
- **No of hours per period** - The typical number of work hours associated with each time period. Used for comparison with the actual hours entered.

Administrative Tasks

`Time Tracking > Administrative Tasks`

The **Administrative Tasks** page defines tasks that represent recurring operational activities, unassociated with specific projects. `Vacation`, `Meetings`, and `Travel` are typical examples. This table includes a set of predefined `(System)` administrative tasks.

When creating a time entry using a **Timer** *(page 9)* you're given the option of classifying the elapsed time as an administrative task. The Work Type column in Time Tracking > **My Timesheets** *(page 3)* identifies these time entries as `Admin Task`.

Actions

- **New** - Create a new task.
- **Edit** - Edit an existing task.

Adding or Editing an Administrative Task

- **Name** - Enter a name for the task.
- **Desc** - Enter a description for the task.
- **Enabled** - If checked, the task can be added to a timesheet.
- **Automatically Added to Timesheets** - If checked, the task is automatically added to a timesheet.

Approval Patterns

`Time Tracking > Approval Patterns`

The **Approval Patterns** page defines one-step or two-step approvals patterns. Two types of approvers can approve a timesheet:

- The **supervisor** of another staff member—as specified using the **Supervisor** drop-down list in System >Orgs/Groups/Depts/Staff > Manage > Staff.
- A **manager**, which is the *supervisor of a supervisor*.

Approval patterns can be created that require approval from a `Supervisor`, a `Manager`, or either. For example:

- `Supervisor` only
- `Manager` only
- `Supervisor` or `Manager` - A single approval by either one is required to approve a timesheet.

> **Note:** The staff records of both approvers and those being approved must be associated with their own VSA user logons.
>
> **Note:** See **Time Tracking** *(page 2)* configuration options.

Actions

- **New** - Create a new approval pattern.

- ▪ **Edit** - Edit an existing approval pattern.
- ▪ **Activate** - Activate an approval pattern.
- ▪ **Deactivate** - Deactivate an approval pattern. Deactivating an approval pattern clears that approval pattern from all staff records that are using it. All subsequent timesheets submitted by those staff members are auto-approved until a new approval pattern is assigned to their staff records.

Adding or Editing an Approval Pattern

- ▪ **Pattern Name** - Enter the name of the approval pattern.
- ▪ **First Approver** - `Supervisor` or `Manager`.
- ▪ **Second Approver** - `Supervisor` or `Manager` or leave blank.

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