eTimesheets Time. Your way.

# Creating Charges

The following guide should provide you, the eTimesheets administrator, with all the information you need to successfully setup charges in eTimesheets.com.

## Overview

Historically in timekeeping a "charge" is the individual item that can be found on a timecard applied to a specific task. Depending on the type of business you have, that market you are in and the size of your organization will drive the number and complexity of your charge structure.

At eTimesheets we have developed a very flexible mechanism for defining and exposing charges to your employees. Think of a charge as something you build up from a series of components (attributes).

## Define your charge structure

Since there are no rules and numerous ways to setup charges in eTimesheets we have provided the following guidelines and example to give you some ideas how to structure your charges.

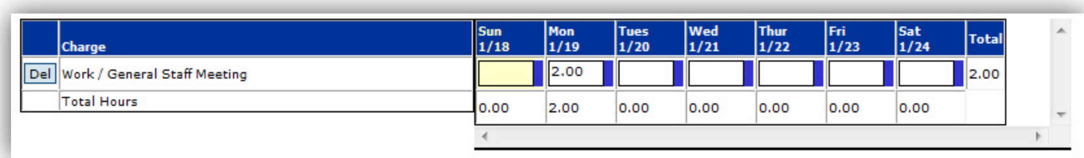
### Example 1 - A Typical Small Business

In Table 1 we have a company that is a small business that has only one general charge for all work tasks and allows the employee to enter a comment along with the charge. By utilizing the first system attribute as a comment field, the administrator can informally track the way employees are spending their time. No other charges are being used since the company doesn't track vacation or sick time.

| Charge | Attribute 1 | Attribute 2 | Attribute 3..... | Attribute 10 |
|---|---|---|---|---|
| Work | Comment | Not Used | Not Used | Not Used |

Table 1

A charge on an employee's timesheet for attending a staff meeting might look something like this:



| | Charge | Sun 1/18 | Mon 1/19 | Tues 1/20 | Wed 1/21 | Thur 1/22 | Fri 1/23 | Sat 1/24 | Total |
|---|---|---|---|---|---|---|---|---|---|
| Del | Work / General Staff Meeting | | 2.00 | | | | | | 2.00 |
| | Total Hours | 0.00 | 2.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |

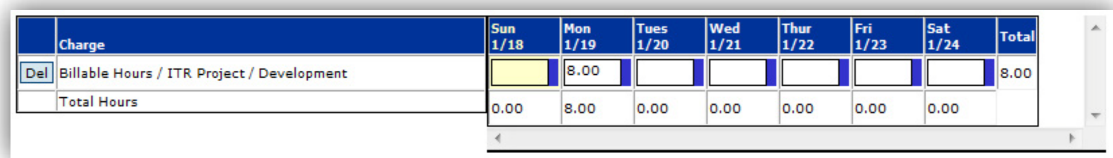
### Example 2 - A Services Company

In Table 2 we have a services company that is using three charges. The first being all billable work, the second is vacation and finally sick time. For the billable Hours charge they are utilizing two attributes, the first for the project name and the second for the task.

| Charge | Attribute 1 | Attribute 2 | Attribute 3….. | Attribute 10 |
|---|---|---|---|---|
| Billable Hours | Projects | Task | Not Used | Not Used |
| Vacation | Not Used | Not Used | Not Used | Not Used |
| Sick | Not Used | Not Used | Not Used | Not Used |

Table 2

A charge on an employee's timesheet for working on a billable project might look something like this:



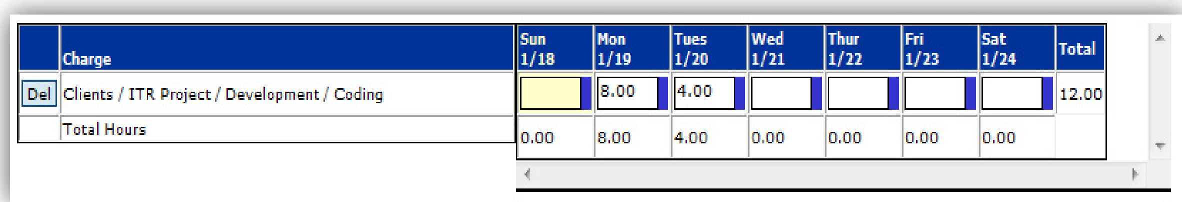

## Example 3 - Defense/Government Contractor

In Table 3 we have a government contractor that is using six charges. The most important being all Client work. For the Client work charge they are utilizing three attributes to describe the project name, the main task and finally sub-task.

| Charge | Attribute 1 | Attribute 2 | Attribute 3….. | Attribute 10 |
|---|---|---|---|---|
| Clients | Projects | Tasks | Sub-Tasks | Not Used |
| Overhead | Not Used | Not Used | Not Used | Not Used |
| Vacation | Not Used | Not Used | Not Used | Not Used |
| Sick Leave | Not Used | Not Used | Not Used | Not Used |
| LWOP | Not Used | Not Used | Not Used | Not Used |
| Overtime | Not Used | Not Used | Not Used | Not Used |

Table 3

A charge on an employee's timesheet for working on a client project might look something like this



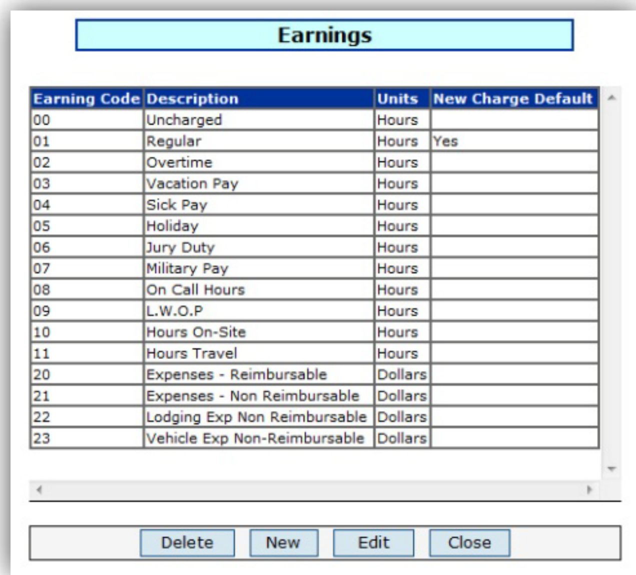

Now let's get started building a charge.

# Create Earning Codes

The first step in setting up eTimesheets charges is to define your earning codes. Earning codes are special codes or definitions in all payroll systems that represent the different types of earnings an employee receives. These can include regular pay, overtime pay, bonuses, reimbursements and tips. Each earning code you will have specific rules to follow for calculating and taxing each type of earning.

They are typically defined by your payroll system and should be mirrored in eTimesheets if you intend to drive payroll with your timesheets. If you are not using eTimesheets to drive your payroll system the importance of these codes is lessened. Most basic small company setups only have 2-3 Earnings Codes such as Regular Hours, Vacation Hours and Sick Time.

Select "***Administrator->Earnings***" from the system menu and the page in Figure 1 will be displayed. This page displays a list of all the earning codes that are currently entered into eTimesheets. The first column lists the actual codes themselves, the second column is the description, the third is the units the earnings represent and finally whether the charge is a default charge for new charges.




| Earning Code | Description | Units | New Charge Default |
|---|---|---|---|
| 00 | Uncharged | Hours | |
| 01 | Regular | Hours | Yes |
| 02 | Overtime | Hours | |
| 03 | Vacation Pay | Hours | |
| 04 | Sick Pay | Hours | |
| 05 | Holiday | Hours | |
| 06 | Jury Duty | Hours | |
| 07 | Military Pay | Hours | |
| 08 | On Call Hours | Hours | |
| 09 | L.W.O.P | Hours | |
| 10 | Hours On-Site | Hours | |
| 11 | Hours Travel | Hours | |
| 20 | Expenses - Reimbursable | Dollars | |
| 21 | Expenses - Non Reimbursable | Dollars | |
| 22 | Lodging Exp Non Reimbursable | Dollars | |
| 23 | Vehicle Exp Non-Reimbursable | Dollars | |

**Figure 1 – Earning Codes Page**

Select the "***New***" button to add a new Earnings Code. You will see a new page appear as in Figure 2.

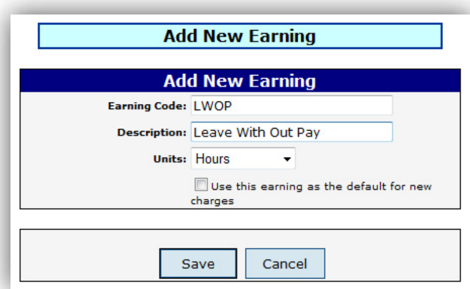



**Figure 2 – Add New Earning Code**

Enter your new Earnings Code in the first field labeled "***Earning Code***" along with a meaningful description. In eTimesheets we typically recommend you keep codes short yet meaningful then expand that abbreviation when filling in the description. For most items, you will have the ability to display either the actual codes or the descriptions on the timesheet. The default unit of measure for Earning Codes are Hours. You may also select "dollars" and generic "units".

Back on the main Earning Codes page you can edit any of the existing codes by highlighting the code with your left mouse button then selecting the "***Edit***" button. You will see an Edit Earning page appear as in Figure 3. You can change the Description, the Units of measure the code represents and whether you want this to be the default earning code for new charges.

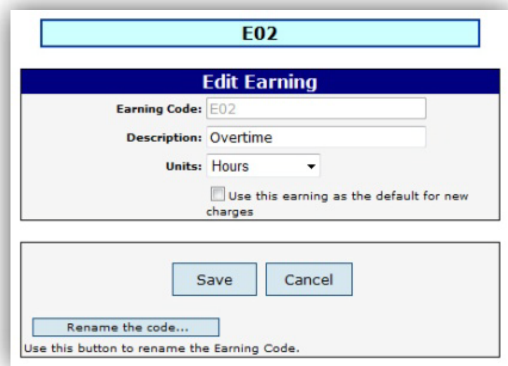



**Figure 3 – Edit Earning Code Page**

If you need to rename an Earning Code, you must use the "***Rename the code…***" button located at the bottom of the page section. When you select the "***Rename the code…***" button a new page will be displayed that will allow you to change the name of the earnings code.

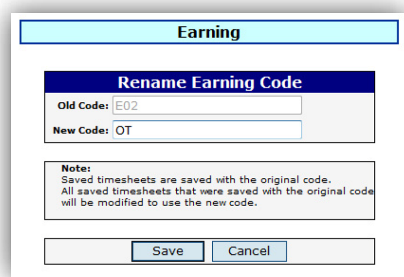



**Figure 4 – Renaming Earning Code**

Enter the new code in the second field and select the "***Save***" button. Any timesheets that have already been saved with the original code will retain that code and any new timesheets saved moving forward will contain the new earnings code.

## Setup the Attributes

The second step in setting up charges in eTimesheets is to define the number of attributes you will use within the charges. Select ***Administrator->Attribute Setup*** from the system menu to display the Attribute Setup page (see figure 5).

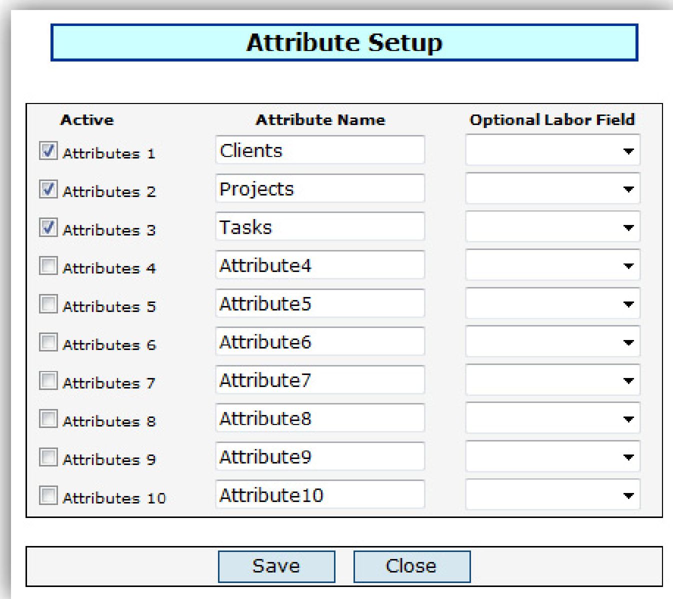



**Figure 5 – Attribute Setup Page**

On this page you can define the number of attributes you plan on using to define your charges. You must select the "***Active***" checkbox for a charge for it to be visible on a timesheet. Choose names that are meaning but not too long. The field labeled Optional Labor Field can be ignored since it is not used by our retail eTimesheets customers and only is useful with our OEM payroll customers. If you are interested in learning more about integrated payroll please contact us.

## Define Each Charge Attribute's Content

The third step in setting up charges in eTimesheets is to define the contents of the attributes you created in the previous step. To define all the individual charge attributes select ***Administrator->Attributes*** from the system menu. The attribute page for the first level attributes will be displayed as in Figure 6 below. To add a new level-1 attribute to eTimesheets select the "***New***" button at the bottom of the page. To edit an existing level-1 attribute select the "***Edit***" button. To delete a level-1 attribute select the "***Delete***" button

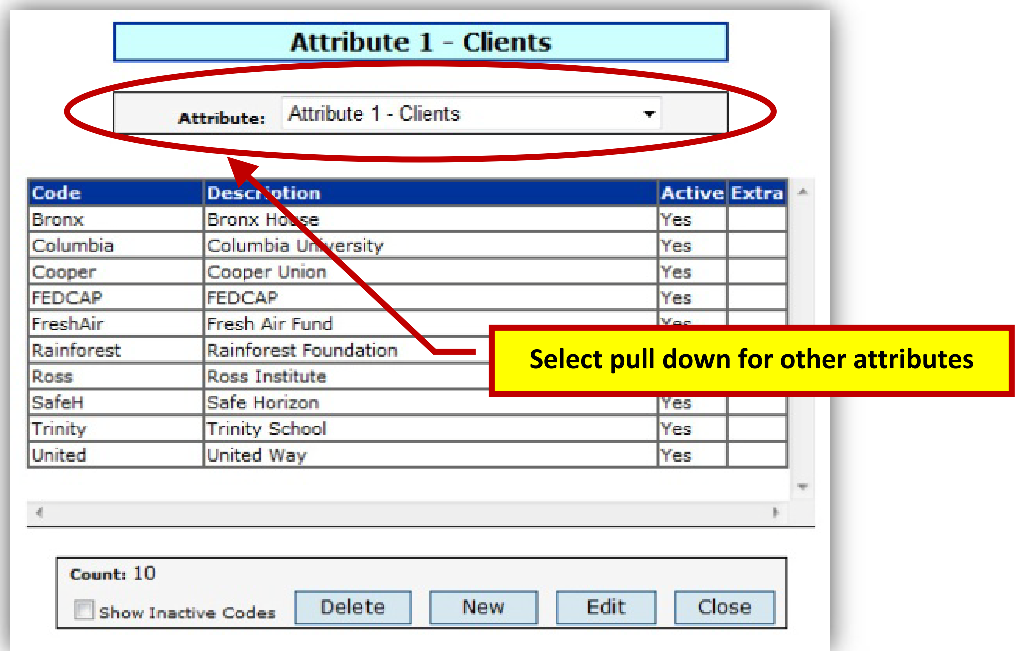



**Figure 6 – Attribute 1 Page**

Next, move onto the level-2 attributes by selecting the highlighted pull down menu labeled ***Attribute*** that is currently pointing to ***Attribute 1 – Clients***. The level-2 attribute page should display as shown in Figure 7.

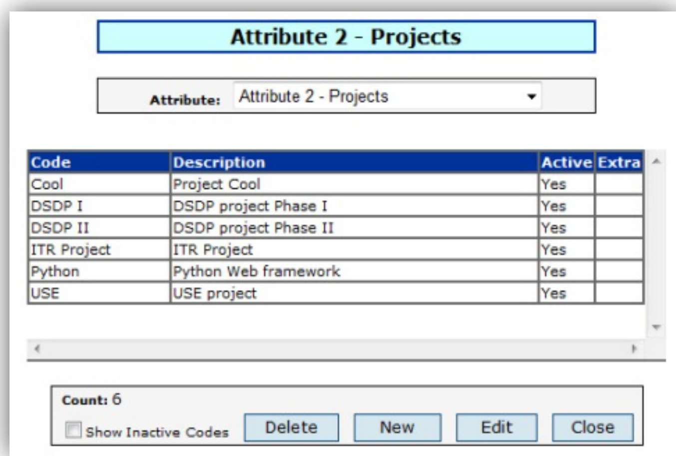
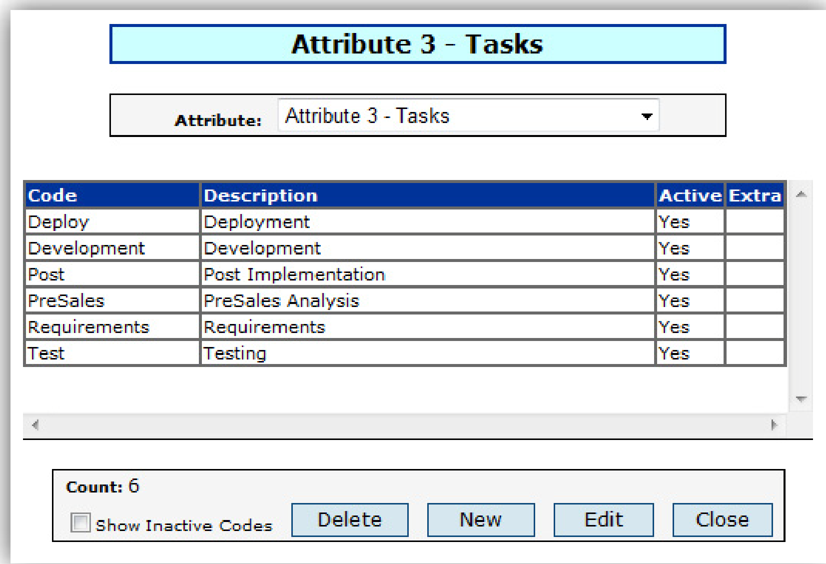



**Figure 7 – Attribute 2 Page**

Next, move onto the level-3 attributes by selecting the highlighted pull down menu labeled ***Attribute*** that is currently pointing to ***Attribute 2 - Projects***. The level-3 attribute page should display as shown in Figure 8.




| Code | Description | Active | Extra |
|---|---|---|---|
| Deploy | Deployment | Yes | |
| Development | Development | Yes | |
| Post | Post Implementation | Yes | |
| PreSales | PreSales Analysis | Yes | |
| Requirements | Requirements | Yes | |
| Test | Testing | Yes | |

**Figure 8 – Attribute 3 Page**

If you are all finished examining or modifying the level-3 attributes select the "*Close*" button which will return you to the default page define for your account.

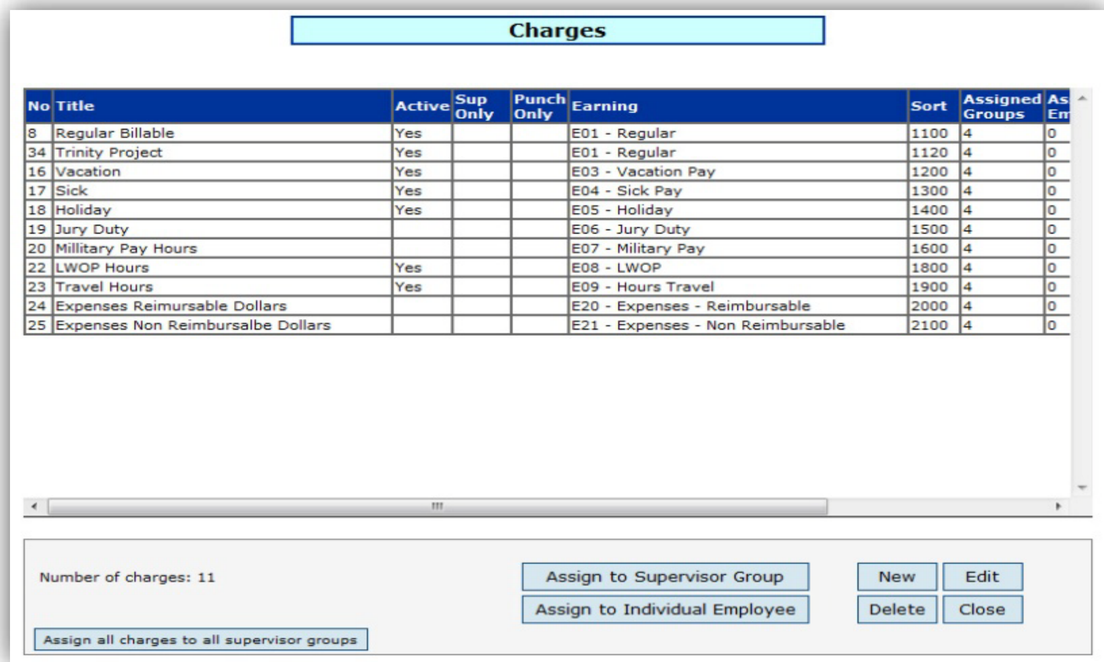
## Create the Charges

Now that you have your attributes setup and the actual items for each attribute defined you are ready to create a new charge. Select the "***Administrator->Charges***" item from the website menu and you should see the page in figure x displayed. This is a list of all the existing charges in the system and their status.

Always make sure you assign the new charge(s) you have just created to all employees or just specific employees. An orange highlight in the first column labeled "***No***" means the charge has not yet been assigned to an employee or group of employees.

To assign the charge to a specific group of employees use the button labeled "***Assign to Supervisor Group***" and select the appropriate group from the list presented. To assign a charge to an individual employee or set of employees select the button labeled "***Assign to Individual Employee***" and select the employee(s) that will be able to see that charge.

To assign all the charges to all employees use the button labeled "***Assign all charges to all Supervisor Groups***".



Charges

| No | Title | Active | Sup Only | Punch Only | Earning | Sort | Assigned Groups | As Em |
|---|---|---|---|---|---|---|---|---|
| 8 | Regular Billable | Yes | | | E01 - Regular | 1100 | 4 | 0 |
| 34 | Trinity Project | Yes | | | E01 - Regular | 1120 | 4 | 0 |
| 16 | Vacation | Yes | | | E03 - Vacation Pay | 1200 | 4 | 0 |
| 17 | Sick | Yes | | | E04 - Sick Pay | 1300 | 4 | 0 |
| 18 | Holiday | Yes | | | E05 - Holiday | 1400 | 4 | 0 |
| 19 | Jury Duty | | | | E06 - Jury Duty | 1500 | 4 | 0 |
| 20 | Millitary Pay Hours | | | | E07 - Military Pay | 1600 | 4 | 0 |
| 22 | LWOP Hours | Yes | | | E08 - LWOP | 1800 | 4 | 0 |
| 23 | Travel Hours | Yes | | | E09 - Hours Travel | 1900 | 4 | 0 |
| 24 | Expenses Reimursable Dollars | | | | E20 - Expenses - Reimbursable | 2000 | 4 | 0 |
| 25 | Expenses Non Reimbursalbe Dollars | | | | E21 - Expenses - Non Reimbursable | 2100 | 4 | 0 |



**Figure 9 – Main Charges Page**

To edit a particular charge select the “***Edit***” button in the lower right hand side of the page. Similarly select the “***Delete***” button to remove a charge from the system. To return to the previous page select the “***Close***” button.

To create a new charge, select the button labeled “***New***”. The charge creation page will be displayed as seen in figure 10 below.

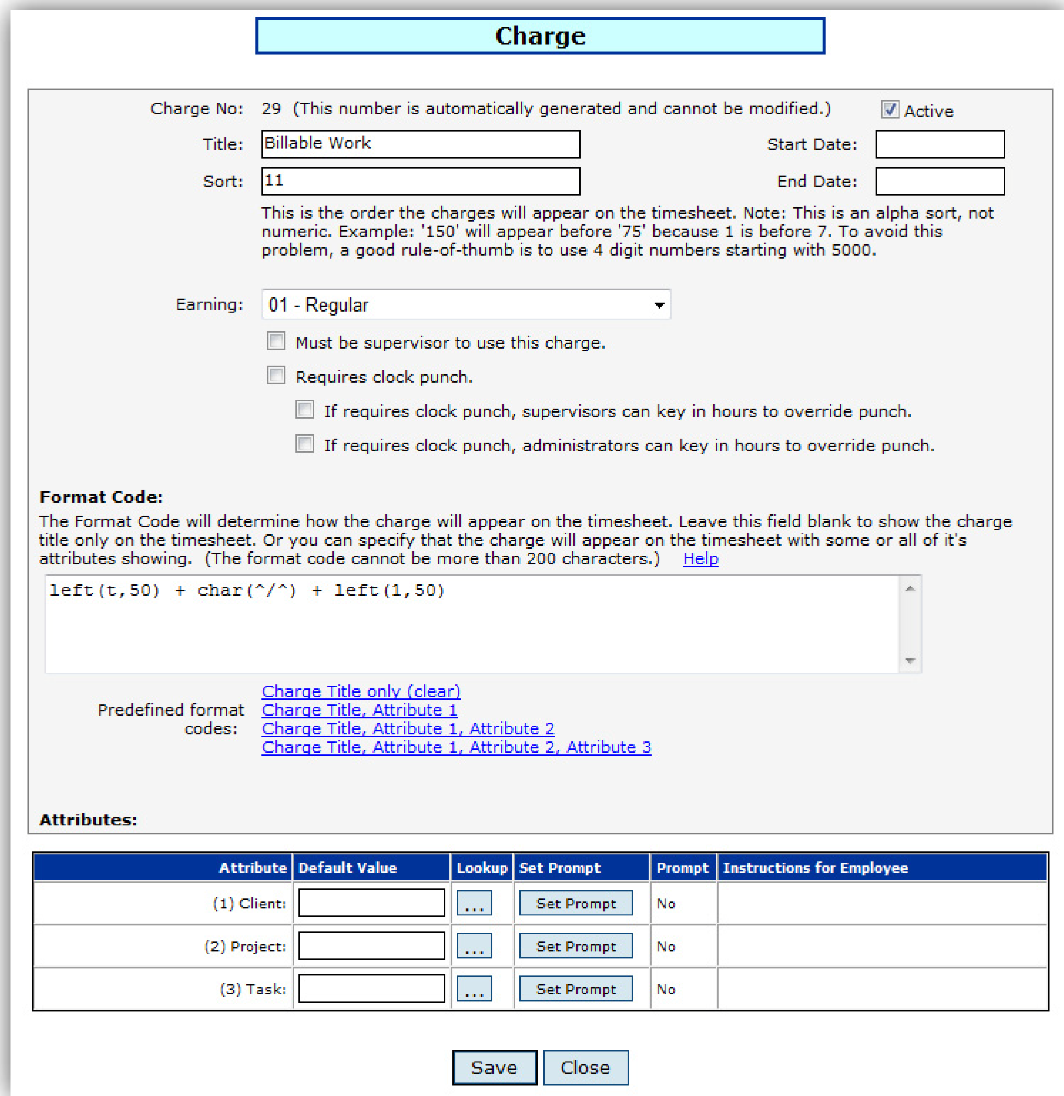



Figure 10 - Charge Definition Page

Working your way from the top down this guide will cover all aspects of this page.

**Charge Number** - First off, you will see at the top of the page there is a note that states the charge number is automatically generated by eTimesheets and cannot be modified. This refers to an internal index, or number, that is used to track charges throughout the system. Although you can't change this number you can choose to hide it on the charge selection page and timesheets so as not to confuse your employees. Refer to the help system to find the correct format codes to manage the charge number (hint: scn & hcn).

**Active** - If you plan to use this charge immediately make sure you select the checkbox labeled ***Active*** on the top right of the page. This makes the charge available on the charges selection page. Reasons for deactivating a charge might be that a particular charge is no longer available or a contract has ended.

**Title** - Define the name of the new Charge

**Sort** - Enter a sort code to help order the list of charges

**Start/End Date** - If the charge will only be valid for a specific period of time you can enter a start date and end date for the charge. This is typical if you have a long term contract with specific tasks the end before the contract is complete. You can avoid having employees charging time against a closed charge by using this mechanism.

**Earning** – Select the appropriate earning code from the pull down menu provided. You should all the available earning codes that you defined earlier.

**Format Code** - The code that is entered in this area will determine how the charge is displayed on the timesheet. Although these codes are cryptic we have provided a few simple predefined codes for you to choose from. As you get more familiar with eTimesheets or you have extremely complicated (lots of attributes) charges you can experiment with modifying these format codes. To learn more about the Format Codes select the "***Help***" link just above the Format Code section to get a list of all the available codes and what they do.

Warning: If you do not enter a format code your charge will not display on the timesheet. At a minimum use one of the predefined format codes we have provided. Typically you would select the predefined code that matches the number of attributes you have defined.

**Attributes** – This is the part of defining a charge where you determine the number of attributes you plan to use and their behaviors. A list of all the available attributes will be displayed in sequential order. You must decide whether you want the charges to be predefined and displayed to the employees or have them prompt the employee for the proper components.

Use the Lookup button "***…***" to select a default value for the charge or the "***Set Prompt***" button to define the behaviors of the attribute when the employee adds this charge to their timesheet. If you select the "***Set Prompt***" button you should see the page displayed in figure 11 below.

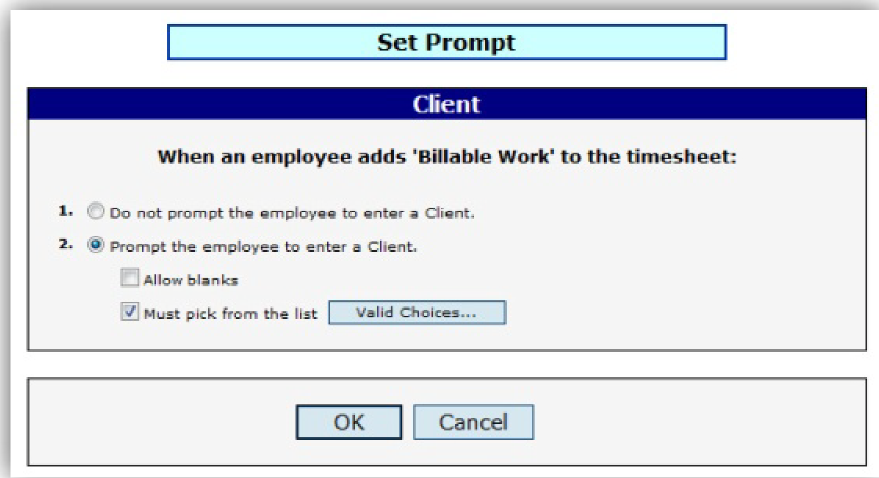



Figure 11 - Set Prompt Attribute Page

You can choose to ignore this attribute if it wasn't given a default value by selecting the first radio button or prompt the employee to enter the attribute by selecting the second radio button. Prompting the employee for the attribute can either have a free form text entry allowing him/her to leave the field blank or force a selection from the list of predefined attributes. Additionally you can decide which of the attributes defined earlier are valid for this charge.

Choosing the "***Valid Choices***" button brings up the page displayed in figure 12 below. Simply select the specific attributes you would like to be presented to the employee for this charge. Selecting the "***All are Valid***" checkbox will make all the attributes available to the employees.

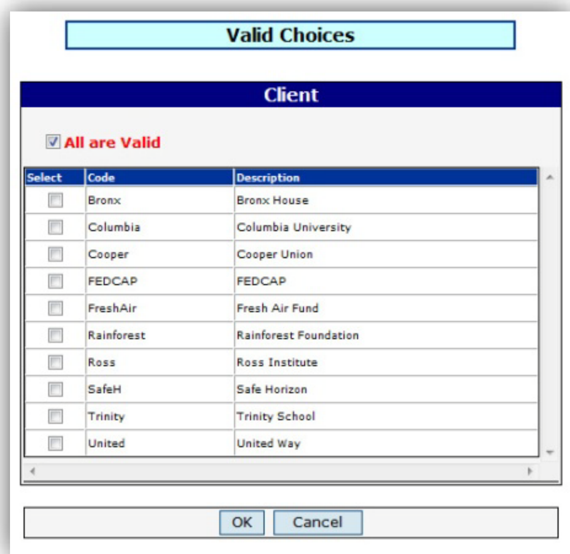



Figure 12 - Valid Choices Page

That's it, we have just covered all the steps required to build a charge in eTimesheets. Now let's go see what a charge will look like on a timesheet. Select ***Timesheets*** from the system menu and your timesheet will be displayed. Let's go ahead and see what the new charge you just created looks like.


**Figure 13 – A Sample Timesheet**

If you have not entered any charges yet your timesheet should be empty. Select the "***Add Charge***" button and find one of the charges you just created. Work through the selection process depending on how you defined the charge. You should see something similar to the charge displayed in figure 13. If you don't see anything displayed or the charge is not displayed properly on the timesheet you may want to go back and check all your formatting codes.

## Summary

You should now have the skills necessary to use setup and maintain charges eTimesheets.com. If you have any questions on the configuration of charges in eTimesheets please contact your eTimesheets point of contact. If you have any questions on the operation of eTimesheets don't hesitate to send an email to support@eTimesheets.com.

Thank you for using eTimesheets.com!

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