Getting started with Time

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Get the big picture as well as the minute detail of all time spent in your practice. TaxCalc's new time-logging, automatic tracking and reporting tool delivers the information you need to bill accurately and keep tabs on productivity in your practice.

Track chargeable and non-chargeable activity and generate reports to gain visibility of client profitability and staff performance. All your time-related tasks are made easy with TaxCalc Time.

Now you can actually see the value your people provide to your practice and clients. Working in harmony with every product in the TaxCalc suite, Time lets you track hours across job functions, making it easy to access, analyse and approve time spent, both on billable and non-billable activities.

For more information on Time, please visit our website.

This guide will show you how to:

- Set up licence and user permissions to control access to Time.

- Configure your default working hours and charge out rates.

- Set your timesheet periods and automatic Timetracker charge period.

- Log time and use the automatic Timetracker to record time for clients and work.

- Submit, approve and reject timesheets.

- View timesheets in calendar mode.

- Create ad hoc expenses.

- Import any Initial WIP and report on time in WIP Overview to review time logged against clients and expected charges relating to specific services.

- Analyse client related time logs where you can mark them as billed or unbilled.

Step 1
Set Licence and User Permissions for Time

To get started your Administrator is automatically assigned a Time licence. You'll need to assign a licence to each user that requires access to Time.

1. From the **TaxCalc** home screen select **Help > View Licence Information** and select the **Time** product.

2. Click **Manage Licence** and select the user(s) you want to access **Time.**

3. Launch **Admin Centre** from the home screen to set your users' permissions.

4. Within the **Security Roles** screen select the **Role Name** and click **Edit Role.**
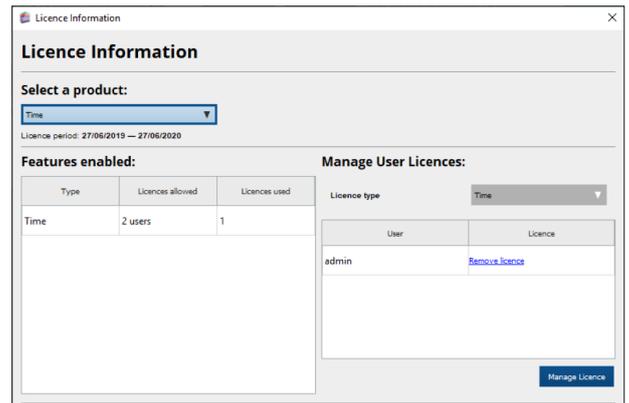
5. From the **Administration** menu you can set the required **Licence Permissions.** Here you can determine whether users can manage licences for **Time.**
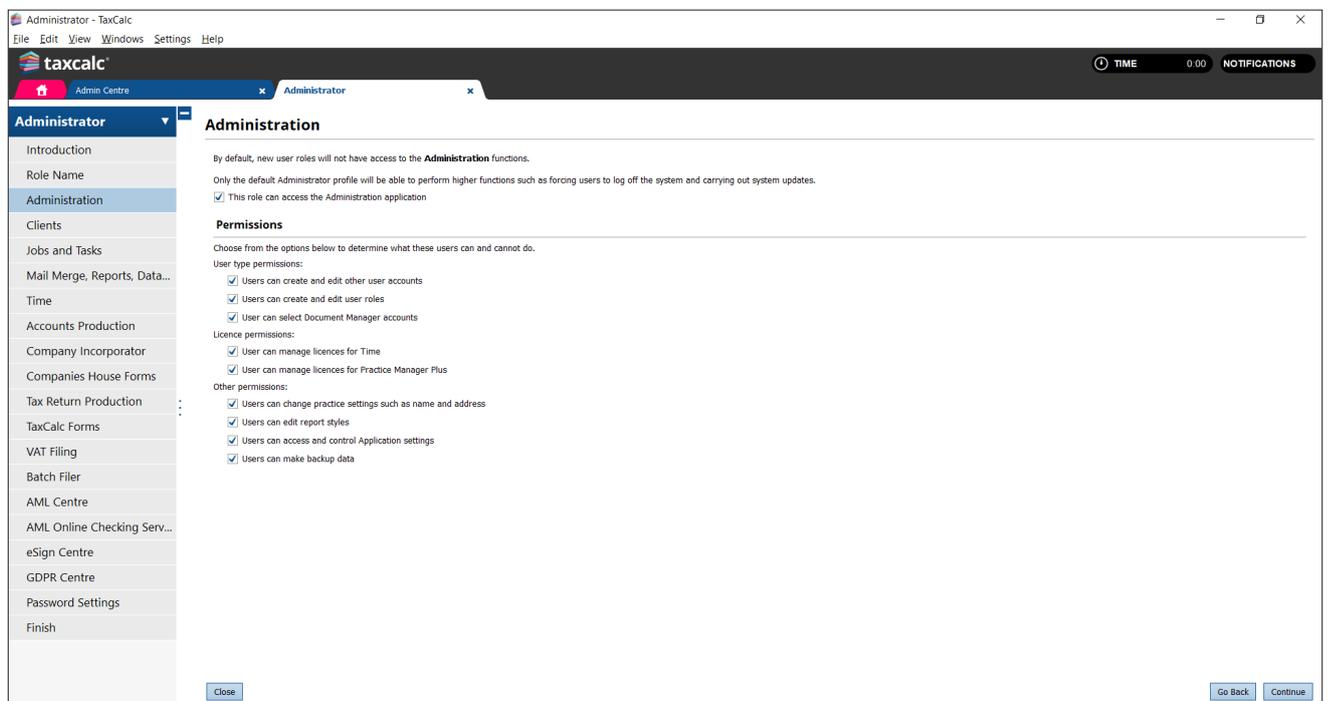
6. From the **Time** option you can control the users' ability to log time and whether they can view and approve other users' timesheets. You can determine the charge out rate and billing permissions as well as any reporting options.

Step 2

Configure Default Working Hours and Charge Out Rates

By default, users are expected to follow the firm working hours. Within TaxCalc you can set your own firm wide and user specific working hours. If you provide any services to clients on a Chargeout rate (user) basis, you can set the users charge out rate to calculate fees as a default.

1. To set firm wide working hours, open **Admin Centre** and select **Applications ▶ Time ▶ Customise Time.**

2. Select **Working hours.**

3. Use this screen to set default working hours for the firm by updating the following:

• Day

• Start

• End

• Total Hours

4. To set working hours and charge out rates per user, select **User > Edit User** within **Admin Centre.**

5. Select **Working Hours and Rate.**

6. Click **Override the default hours.**

7. Click **New** and add new working hours for the user.

8. If the total hours exceed six hours, an hour break is deducted in the Total Hours column. You can manually adjust this as required.

9. If any services are provided to clients then set the **User charge out rate** to be used to calculate fees as a default.

10. Enter the **From** and **To** period the charge out rate is to apply, then enter the **Hourly rate (£).**

11. To use a current charge out rate, leave the **To** field blank.

Step 3
Timesheet Periods

Choose how frequently you want your employees to complete
a timesheet for approval in Timesheet Periods. You can set
this to weekly or monthly, it's entirely up to you.

From here you can decide the number of minutes to round
up time logged by the automatic Timetracker. By default,
the automatic Timetracker will round up to the nearest
minute, but you can change this to suit the requirements
of your practice.

1. From **Admin Centre > Applications > Time >
Customise Time,** select **Timesheet periods.**

2. Set your preferred Timesheet period, weekly or monthly.

3. Enter the **Charge period (mins)** to set the number
of minutes to round up by when using the automatic
Timetracker.

4. You can also set to **Always round up to next
duration block.**
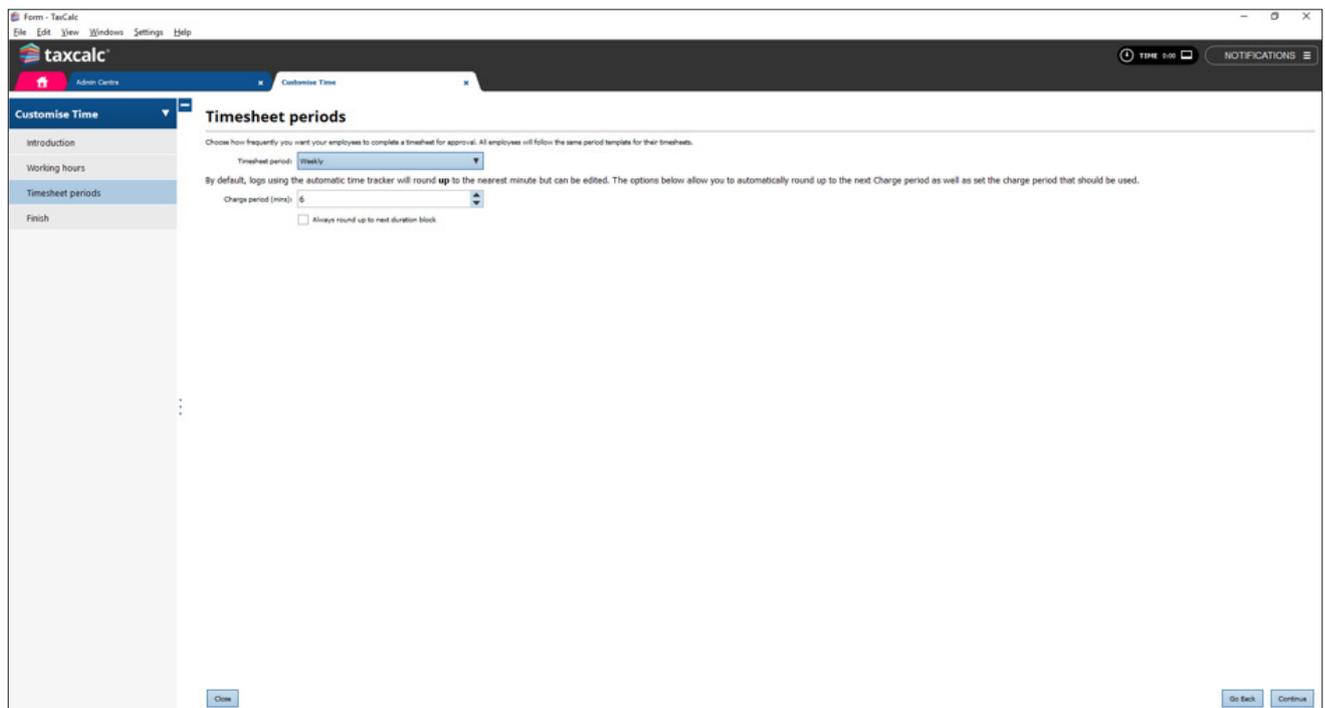
Step 4
Log Time

Use Time Logs in the Time module to log time against your clients. You can enter time against individual clients one by one, or multiple clients all in one go. Link Jobs to the time you're logging so that you can see exactly what you've been working on for each client.

If you're working on a specific client or work item, look out for the red flashing prompt of the automatic Timetracker. Simply click the start button from the automatic Timetracker to start recording the time you're spending on the client.

Log Time for a Client:

1. To log time for a specific client, launch **TaxCalc Time** and select **Time Logs.**

2. Click **Add Log** to start entering your time.

3. Select whether the log is client related or not and what type of work the log relates to.

4. If the log is client related, select the **Client.**

5. You can also select the specific work the log is related to by selecting a Job or Task to link to the log. If Jobs and/ or Tasks have not been created for the client, choose the type of work the time relates to instead.

6. Enter the log **Date** and the **Time spent.**

7. Select whether the time log is **Billable?**

8. Enter **Any other notes** if required and click **Save** to add the time log.

Log Time for Multiple Clients:

1. To log time for multiple clients, launch **TaxCalc Time** and select **Time Logs.**

2. Click **Add Log** to open the **New Timesheet Log** dialog and select **Multiple entry Mode.**

3. From here you can enter multiple dates, clients, any associated work, the time spent and whether the time log is billable or not.

**4.** Click **Save** once you've entered all the requirements to return to the Time Logs screen.

> **"We've introduced the Time module and it's great, straight away at my fingertips we can judge productivity..."**

Graeme Seavor
Seavor Accounting

Automatic Timetracker:

1. To log time using the automatic Timetracker in the client or contact record, select the **automatic Timetracker** at the top right-hand side of the screen. This will flash as a prompt to start recording.

2. Select the **Record** button next to the required client or contact to start recording the time.

3. To stop recording time at any stage, select **Stop** within the **automatic Timetracker.**

4. In the **Record Time Log** dialog, you can review the recording details and either **Discard** or **Save** the recording.

5. You can see the time recorded in the Time Logs screen.
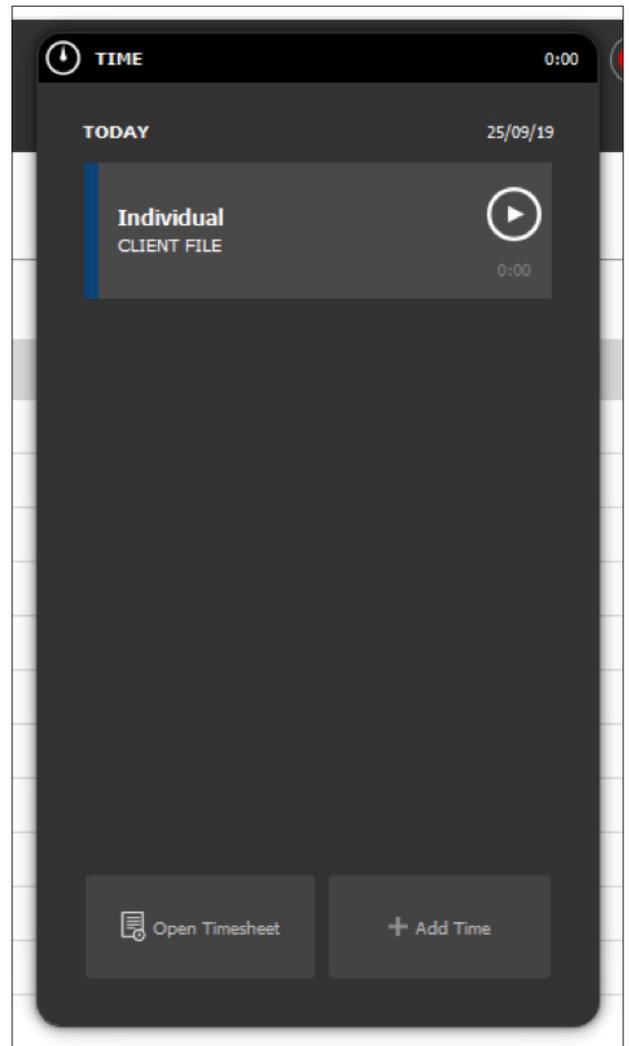
Step 5
Submit, Approve and Reject Timesheets

Once you have entered your time logs they can be submitted for approval. Depending on your permissions you will then be able to either approve or reject the time submitted.

To Submit a Timesheet:

1. Launch **TaxCalc Time** and select **Timesheets.**

2. Select your timesheet and click **Submit.**

3. In the **Submit for Approval** dialog enter any comments for the approver and click **Submit.** The timesheet's status is then updated to **Submitted.**

To Approve a Timesheet:

1. Launch **TaxCalc Time** and select **Timesheets.**

2. The displayed timesheets default to the user logged in. To approve another user's timesheets, select the appropriate user from the **User** dropdown list.

3. Select the submitted timesheet and click **Approve.**

4. In the **Approve Timesheet** dialog enter any comments and click **Approve.** The timesheet's status is then updated to **Approved.**

To Reject a Timesheet:

1. Launch **TaxCalc Time** and select **Timesheets**.

2. The displayed timesheets default to the user logged in. To reject another user's timesheets, select the appropriate user from the filters panel.

3. Select the submitted timesheet and click **Reject.**

4. In the **Reject Timesheet** dialog select whether you want to **Mark all logs as rejected.**

5. Enter a **Rejection reason** and click **Reject.** The timesheet's status is then updated to **Rejected.**

You can also individually reject time logs from the **Time Log** screen by **right-clicking** on the time log to set its status.

Step 6
View Timesheets in Calendar Mode

Managing timesheets in the calendar view enables you to manipulate the entries and make any necessary changes all in one place.

You can:

- Drag and drop time logs to move them from one date to another.

- Extend or reduce the time log by manually adjusting the time log height as required.

- Use the zoom function at the bottom right-hand side of the screen to zoom in or out on the hours logged.

- View the time logged in either week or month view. The month calendar view also displays the expected time logged as per the working hours setup in Admin Centre.

- Use the calendar back and forward arrows to navigate through the weeks or months.

- Review the total time logged per day.

- Refresh the calendar view to ensure up-to-date time log data is displayed.

- View your timesheets, all users' timesheets or individual users' timesheets, depending on your permissions.

- See the status of your most recent timesheets, and depending on your permissions, the status of other users' timesheets.

- Easily differentiate between time logged and tasks due to their colour coding.

- Save any changes using the Save icon.
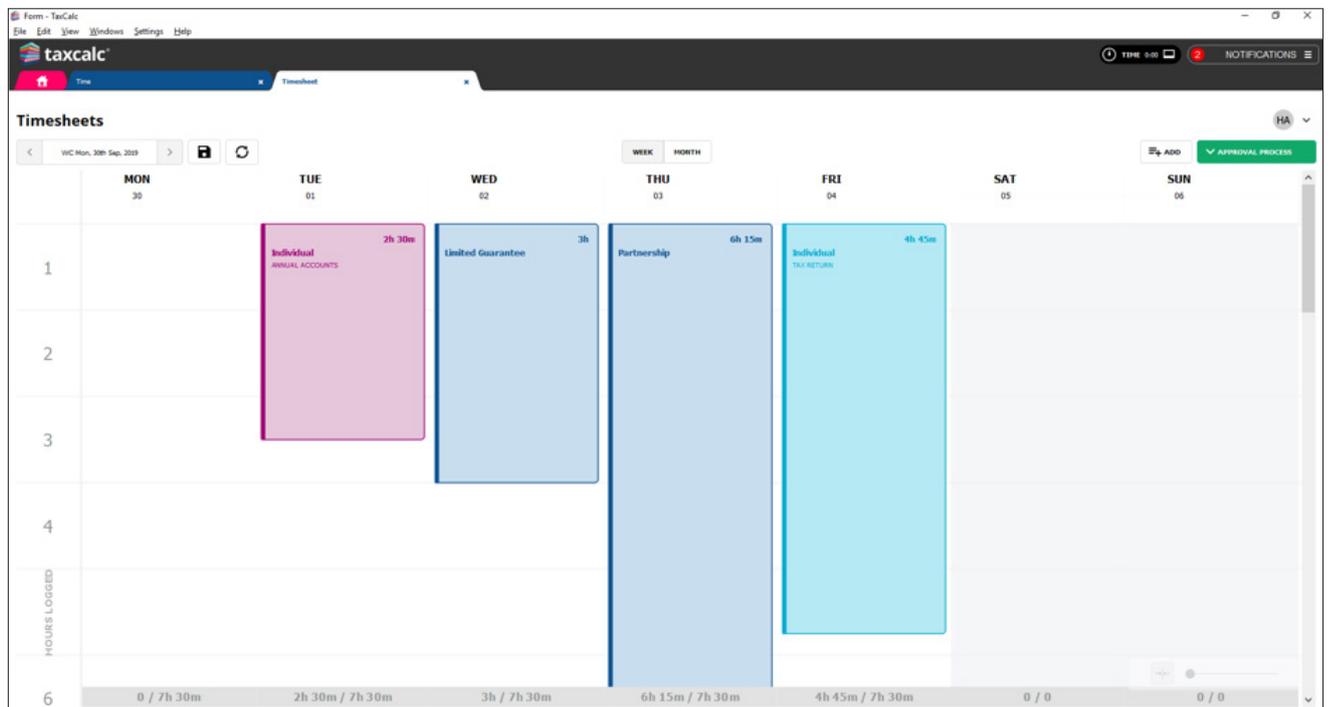
Step 7
Create Ad Hoc Expenses

Ad Hoc Expenses allows you to view and manage your general client expenses. From here you can add, edit and delete expenses where required.

1. Launch **TaxCalc Time** and click **Ad Hoc Expenses.**

2. Click **Add Expense** to open the **New Expense** dialog.

3. Select the **Client** using the filter options on the **Choose client(s) or Businesses** dialog.

4. You can select to **Link this expense to work.**

5. Select the appropriate **Job** or **Task** to link to the expense.

6. Enter the **Date** of the expense.

7. Select whether the expense is **Billable?** and enter a **Billed date** and an **Amount.**

8. Enter details of the expense in the **Description** field then click **Save** to add the expense.

Step 8
Report on Time, WIP Overview

From the WIP Overview screen you can see any imported Initial WIP, what clients you have logged time against, how much you expect to bill each client per service (either as a fixed fee or a charge out rate) and whether the client has been billed for the services offered. If you have added any expenses to the client, these are included here too.

You can also export the WIP data to MS Excel where you can then use this information to raise invoices and billing for your clients.

Import your Initial WIP:

1. Launch **Admin Centre** and select **Applications▶Practice Manager▶ Services Offered.**

2. Click **Bulk Import Initial WIP** and select the file that you would like to import data from.

3. Click **Continue** and select whether **The first row contains column headings.**

4. Then decide which columns in your CSV file relate to the following fields:

   • Client code

   • Service

   • Initial WIP

   • What value denotes credit

5. Click **Continue** to review the information you're importing.

6. If you're happy with the data, click **Continue** then **Finish** to import.

Review the WIP:

1. Launch **Time** and select **WIP Overview.**

2. The following information is displayed:

   • Client/Service/Work

   • Time logged

   • Minutes logged

   • Value

   • Initial WIP

   • Ad hoc expenses

   • Total value

   • Fee basis

   • Expected fee

   • Billed

   • Notes

3. Double-click on a specific work row under any client service to see the detailed time logs and expenses that belong to this work. From here you can also review any Initial WIP associated with this type of work (the service it relates to).

4. If you want to mark any time or expenses associated with this work as billed, select the **Time Log** or **Expense** from the list and click Mark as Billed.

5. Enter the **Bill date** and click **Update.**

6. In the **WIP Overview** screen, click **Print Report** to view the detailed information for each client.

7. You also have the option to click **Export Report** to output the data to **MS Word, MS Excel** or **CSV.**

8. If you select to export to **MS Excel** you can use this data to raise invoices and billing for your clients.
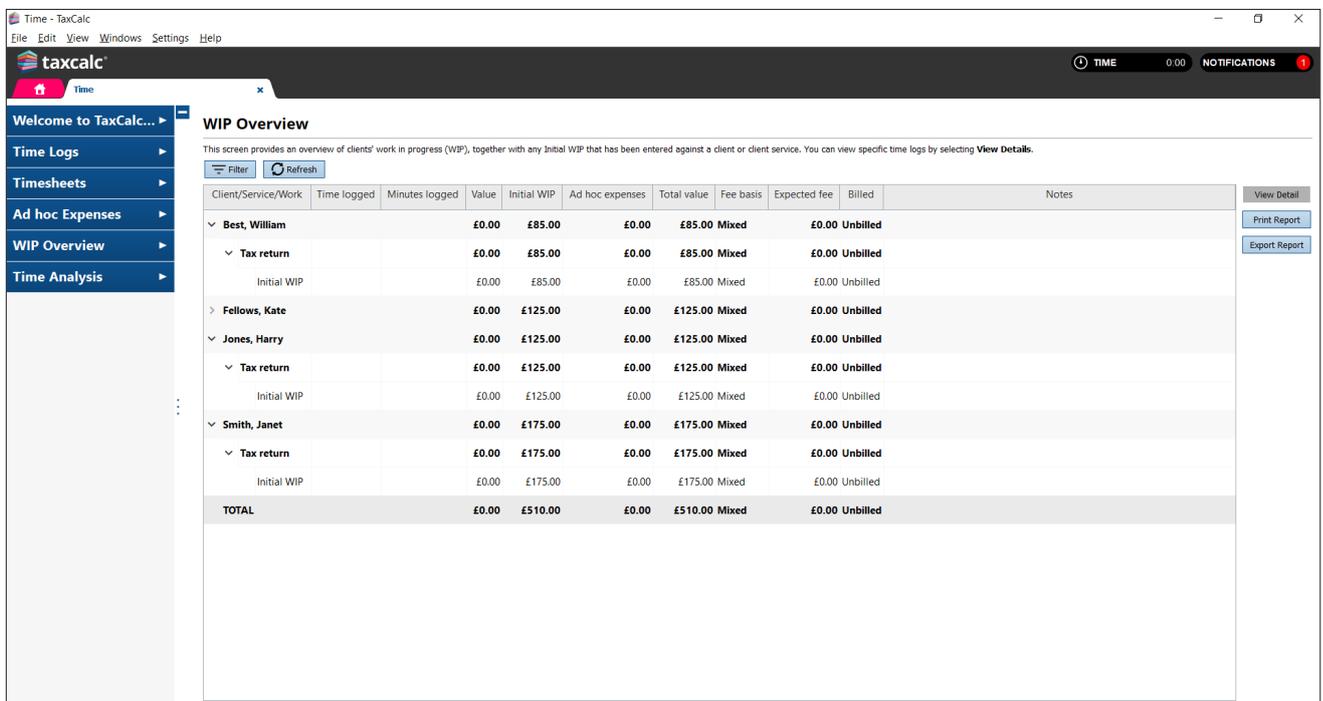
Step 9
Time Analysis

Time Analysis allows you to view client related time logs and mark them as billed or unbilled. You also have the option to mark items as billed in bulk.

You can select to view the time logs by Clients, Work or Users. The displayed time logs default to the user logged in. To view other users time logs set the relevant permissions in the Admin Centre, then select the appropriate user (or users) from within the filters panel.
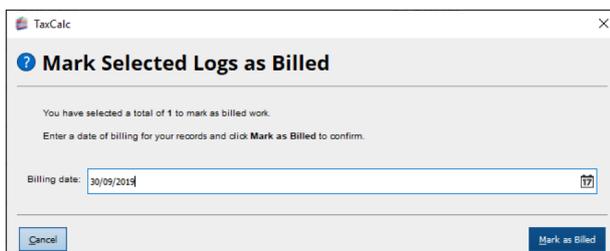
1. Select the required time logs and click the **tick** icon to display the **Mark Selected Logs as Billed** dialog.

2. Enter a **Billing date** for your records and then click **Mark as Billed.**