Dovico Planning & Timesheet
Version 13

BEST PRACTICES

DOVICO™
SOFTWARE

Audience and Context

This document is intended to help clients plan the configuration and use of Dovico Planning & Timesheet. It is to be used as a guide since the diversity of circumstances and infrastructures may provide reason to deviate.

Initial Configuration and Setup

Before using Dovico Planning & Timesheet, each user's web browser pop-up blocker should be modified to include Dovico as a 'safe site' (Allowed Sites).

Check the default Regional Settings set for the database (Menu > Setup tab > Database Options > General tab).

Enter your company's name in the Company Name field (Menu > Setup tab > Database Options > Company Profile tab).

Assignments

Project, task and employee assignments should be kept specific to each employee's needs. This will allow the software to run at peak performance and will allow the employee simple selections for Timesheet and Expense entry. The Quick Assign view can be used to quickly assign employees to only the projects and tasks that are applicable to those specific employees.

Employees

If the employees already exist in Active Directory or Microsoft Project, it may be a good idea to import/synchronize these employees rather than adding them manually. Please review the Integration section of the User Guide or help files.

Time Approvals

By default, Dovico Planning & Timesheet approval workflows are not assigned to employees or projects. Therefore, unless approval workflows are created and assigned, time or expenses submitted by employees are immediately available for reporting, costing, payroll, billing, etc. When creating approval workflows, the absolute minimum number of approving managers should be used. Experience has shown that when more than 2 approving managers are assigned in a workflow, there is considerable delay in getting time/expense entries approved. This is principally the case when employees submit at the very last minute.

Approving managers can be notified by e-mail whenever there are time and/or expenses waiting for their approval. You can setup either an Instant E-mail Notification via the Additional tab in the manager's employee profile or you can setup Scheduled Notifications which will only send 1 e-mail summarizing all time and expenses to be approved. The first option is problematic if the manager is approving for many employees, as his or her e-mail inbox could be flooded with approval notice e-mails.

Reporting – Job Scheduler

Any report can be set to be automatically e-mailed to any employee. However diligence should be used when selecting which reports to send as some reports can contain sensitive information. The total number of reports e-mailed (and their frequency) should be kept to a reasonable minimum.

New Employee

When adding new employees, use this checklist to ensure that everything is ready for time and expense entry.

√ From the Project Assignments view, **add the new employee**. Take note of the employee's User ID and Password (case sensitive).

√ Make certain the **Software Access** field is set to at least 'Time and Expense Entry only' and that the **Security level** is at least set to 'Time and Expense Entry'. This will ensure that the employee can enter time and expenses.

√ If time tracked is used for costing or billing, enter the hourly **Rate of Wages** (Pay rate) and **Rate Charged** (Billing Rate) to the employee.

√ From the employee's properties window, click the **Additional tab**;

　　o (Optional) Select a **Leave/Absences** rule and adjust the Accrual Start date if necessary.

　　o Select the appropriate **Instant E-mail Notification** options for the employee.

√ **Assign projects and tasks** for the new employee. If the new employee will have similar assignments as an existing employee, you can use the Copy Employee Assignments function and then edit individual assignments as necessary.

√ Add the new employee to any applicable **Approval** workflows.

√ Add the employee to relevant **scheduled reporting or notification** jobs (Job Scheduler).

√ Use the **Timesheet Options** view to customize to the employee's time and expense entry screens.

√ Send the new employee the company (database) name, his/her User ID, Password and the login address https://login.dovico.com/

√ **Train** the employee how to use the software to enter time and expenses (or use our On Demand Training http://www.dovico.com/versions/dpt_hosted_training/dpt_on_demand_training.htm

Time Entry Methods

Employees may enter time using more than one method. The following are the more common ways to enter time:

- **Bulk Time Entry** – normally used by employees to enter time (durations) at the end of the day or week. This is the most common method of time entry.

- **Timer Entry**– the most accurate method of tracking time; employees attentively start and stop the timer while working. Effort and commitment by employees is required to use the timer function effectively.

- **Start/End times (In/Out Entry)** – used by employees who don't use the timer function but still require reasonably accurate Start and End times for each time entry.

- **Mobile** – Several mobile applications are available to users to enter their time entry on smart phones and other such mobile devices. These can be found at https://www.dovico.com/tools

Employee Leaves

When an employee leaves the company or will not be using the software any longer, the license that is in use for this employee can be freed by setting the 'Software Uses' field in the employee record to None. (For more information, search for "Free a license" in the Help system's Index tab).

Project Ends

When a project ends, it is recommended that the status of the project be set to Finished, Terminated or Rejected to prevent employees from tracking time against completed projects.

Leave/Absences project

Leave and absences are tracked and monitored via the Leave/Absences project. The Leave/Absences project cannot be deleted. The project can be renamed but should not be used for other purposes.

Custom Terminology

Depending upon the company's usual project structure, different terminology may be used. For example, a "Project" may be called an "Entity" or a "Task" may be called a "Job". In this case the terminology in Dovico Planning & Timesheet can be changed to better suite your company or profession. The Custom Terminology may be changed at any time under Database Options. (For more information, search for "Terminology" in the help system's Index tab).

Security

Security requirements can vary depending upon the organization's structure. It is not recommended to give all users Administrator security level access. It is recommended that the organization's structure be reviewed and an assessment be made to determine to which views or tools each employee requires access. The built-in security groups may be sufficient to accommodate most organizations' needs. However, if the built-in security groups are not adequate, new security groups may need to be created. (For more information, search for "Internal Security Groups" or "Security Groups" in the help system's Index tab).

Deleting items and records

In most administrative views, a delete function is available to delete items (employees, projects, assignments, etc.) from the database. Careful consideration and caution should be used before using the delete function as once an item has been deleted, **it cannot be recovered** except via any database backups. To ensure no one accidentally deletes projects, tasks, etc., create a new security group(s), remove Delete rights to the applicable views and tools for the new security group and then apply it to those employees accessing the administrative functions.

Audit Trail

Dovico Planning & Timesheet's powerful Audit Trail logs additions, changes or deletions in numerous types of records in the database. Its usage is critical if your company must adhere to regulatory

standards and quality control guidelines for the collection of timesheet information. Audit trails are not only useful in recording what changes have been made, who made them and when they were made, but can be beneficial in recovering lost transactions or even to troubleshoot problems.

Designating an Administrator

The optimum Dovico Planning & Timesheet Administrator is someone who will be a significant administrative tool user.

If at all possible, the Administrator should also be the primary support contact for Dovico. It is best for all other employees using the software to route any support questions or problems through the Administrator.

If practical within the organization, a backup Administrator should also be named to cover for the Administrator as required.