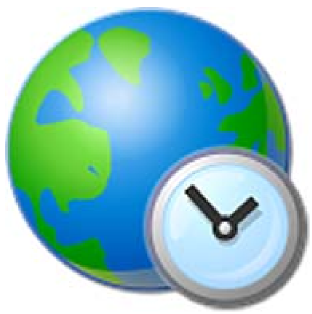

Advanced Time Reports Web

Basic Setup Tutorial

XPress Software Inc.

Table of Content

Introduction

Welcome to the "ATR Basic Setup Tutorial". This brief tutorial will cover all the setup options required to begin using the Advanced Time Reports.

Login into the ATR using the username and password which were created during the installation.

Company Setup

1. Click on the "Options" tab at the top of the screen.
2. Click on the "Company" sub-menu at the left of the screen to expand the menu.
3. Click on the "Roles" tab in order to create different roles within the company. "Roles" could correspond to the different positions or roles of the employees within the company (i.e. Manager or Sales Representative). Repeat this step to add all the Roles.
4. If the company has more than one location, click on the "Locations" tab and type the location. Repeat this step to add all the Locations.
5. To create departments within the company, click on the "Departments" tab and add a department (i.e. Sales or Marketing). Repeat this step to add all the Departments.

6. In order to add Users (i.e. the employees who will be using the ATR), click on the "Users" tab and then on the "Add" button. Fill out the required fields (Login, Password, First Name and Last Name), assign a role, department and location to this user from the dropdown menus. The rest of the fields are not required. In order to send automatic notifications to this user, an e-mail address should be inputted. Repeat this step to add all the Users.

7. To modify the information of any user, click on his or her name in the table, make the changes and click the "Save" button.

8. A user can be disabled if he or she is not part of the company anymore by un-checking the "Enabled" checkbox. This user would not be able to login into the system anymore and will not show up in most reports. In order to see the disabled users, check the "Show Disabled" check box.

Clients Setup

1. Click on the "Options" tab at the top of the screen.
2. Click on the "Clients" sub-menu at the left of the screen to expand the menu.

3. If clients can be subdivided into different categories (i.e. Accounting, Manufacturing, Healthcare, etc.), click on the "Client Groups" tab. Type the group name and click the "Add" button. Repeat this step to add all client groups.
4. To add clients, click on the "Clients" tab and then on the "Add" button. Fill out the "Client Name", "Client Abbreviation" and pick a corresponding Client Group from a dropdown menu, if applicable. Click on the "Save" button. Repeat this step to add all clients.

5. A client record can be disabled if he or she is not part of the company anymore by un-checking the "Enabled" checkbox. In order to see the disabled client records, check the "Show Disabled" check box.

Projects Setup

1. Click on the "Options" tab at the top of the screen.
2. Click on the "Projects" sub-menu at the left of the screen to expand the menu.
3. Click on the "Projects" tab.

4. At the top of the screen, under the "View projects of" drop down list, select one of the clients. Only the projects that belong to the selected client will be shown in the table.

5. To add a new project, click on the "Add" button and fill out the fields.
    a. Type in the name and description of the project.
    b. In the "Total Approved" field, input the number of hours that has been assigned for this project.
    c. Set the status and priority of the project by choosing one of the preset options.
    d. Specify planned or actual Start and End dates.
    e. In the "Assigned To" dropdown menu, select the user (i.e. the employee) that will be assigned to this project. To assign more then one user, choose the "Selection" option, specify the users and click on the "Save" button.
    f. If the "Send e-mail notification" checkbox remains checked, the selected employees will receive an e-mail notification regarding this project.
    g. Click the "Save" button.

6. To set up projects that are the same for all clients (i.e. Meeting or Report Preparation), under the "View projects of" dropdown menu at the top of the screen, click on the "*(Shared Projects)". Click the "Add" button, fill out the information as above and click the "Save" button. The shared project will be added to all of the clients.

7. A project record can be disabled if it is no longer needed by un-checking the "Enabled" checkbox. In order to see the disabled project records, check the "Show Disabled" check box.

Tasks Setup

A project can be subdivided into tasks. This step is optional.

1. Click on the "Options" tab at the top of the screen.
2. Click on the "Projects" sub-menu at the left of the screen to expand the menu.
3. Click on the "Tasks" tab.

4. At the top of the screen, under the "View projects of" drop down list, select one of the clients. Under the "View tasks of" drop down list, select the project. Only the tasks that belong to the selected client's project will be shown in the table.

5. To add a new task, click the "Add" button and fill out the fields.
    a. Type in the name and description of the task.
    b. In the "Total Approved" field, input the number of hours that has been assigned for this task.
    c. Set the status and priority of the task by choosing one of the preset options.
    d. Specify planned or actual Start and End dates.
    e. In the "Assigned To" dropdown menu, select the user (i.e. the employee) that will be assigned to this task. To assign more then one user, choose the "Selection" option, specify the users and click on the "Save" button.
    f. If the "Send e-mail notification" checkbox remains checked, the selected users will receive an e-mail notification regarding this task.
    g. If you check the "Include detailed project information" checkbox then the selected users will receive an e-mail with the project description in addition to the task description.
    h. Click the "Save" button.

8. To set up tasks that are the same for all shared projects, under the “View projects of” dropdown menu at the top of the screen, click on the “*(Shared Projects)”. Under the “View tasks of” dropdown menu, select “*(Shared Tasks)”. Click the “Add” button, fill out the information as above and click the “Save” button. The shared task will be added to all of the shared projects.

9. A task record can be disabled if it is no longer needed by un-checking the “Enabled” checkbox. In order to see the disabled task records, check the “Show Disabled” check box.

This concludes the “ATR Basic Setup Tutorial”.

Thank you for using Advanced Time Reports.