

TIME&BUDGET 2 FOR DAYLITE

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General

Time&Budget Plugin for Daylite

About Time&Budget

The reasonable usage of working time is crucial for the economical success of projects especially for service providers

Daylite assists you to plan and monitor your projects. Based on the Daylite data, Time&Budget gives you additional control over the costs of your projects. Time&Budget differentiates between costs resulting from your employees' salaries and third-party costs.

Time&Budget provides you with data to answer the following questions:

- What task generates which costs?
- What employee is involved in which tasks?
- How much time and effort is used for which projects?
- What is my project status and have thresholds been exceeded?
- What third-party costs arose for which projects?
- What billable services have been performed for a given project?
- What additional services have been performed for which project?

Depending on the industry of your business you have two options of recording your working hours:

Time Registration and Job & Activity Registration

Appointments are being used for *Time Registration*.

Tasks are being used for *Job & Activity Registration*.

Job & Activity Registration

Industries like Design or Prepress often use workflows consisting of a large amount of individual steps. Time frames and actions of these particular steps can be predetermined.

In this case a *Job & Activity Registration* is recommended.

A job could be the composition of an article, where you can estimate ahead of time how long such a job should take. Activities are all actions required to fulfill the job.

Especially jobs with time frames of minutes or few hours require a strict registration of activities related to the job.

In our Prepress example the 'composition of an article' job could be planned with a one hour target time using the *Job & Activity Registration* principle and any amount of activities could than be registered against it.

An employee starts composing the article and gets interrupted after 20 minutes. The employee now stops the activity registration of Time&Budget. A 20 minute activity is now linked to the

unfinished job 'composition of an article'. As soon as the employee resumes the activity, he/she starts the activity registration again. Once the work is done the employee marks the job as done in the task registration. Two activities have now been linked to to a job and can subsequently be analyzed using Time&Budget's reporting tools.

Time Registration

Architects, software developers or consultants often use time registration, as here is being worked on a few different projects only. With time registration he/she can easily track his/her time spend on different projects at the end of the working day.

Both methods of tracking time can be used simultaneously.

Concept of Time&Budget

Categories

In Daylite appointments and tasks can be linked with projects and a category can be assigned to each appointment and each task.

Time&Budget takes advantage of this concept.

Projects as Cost Units and Profit Units

Projects can be either billable customer orders or a pure expense project.

Projects generate costs through in-house working hours as well as through third-party services and goods.

Opposed to those costs there is the profit (charged price) resulting from billable services.

Example:

A web designer received the customer order to develop a website.

Every activity he/she performs to fulfil the order is being tracked as task or appointment and linked with the appropriate project. Alternatively he/she could also use activity sets in Daylite.

Time&Budget divides appointment and task categories into four different kinds:

- Billable Categories
- Non-billable Categories
- Hidden Categories
- Neutral Categories

Additional information is available in the following chapter.

Features

- Track working time easily with Time&Budget Time Registration based on Daylite appointments
- To-the-minute recording of activities with Time&Budget Subtask Timer based on Daylite tasks and subtasks
- Register third party invoices and link them directly with the appropriate project as a PDF file
- The Company Summary helps you to keep track of registered working times and to analyze them by grouping and filtering the data
- Run detailed reports on all activities of projects and opportunities as well as on activities of people and companies. Choose from internal and external reports with different feature sets
- Choose from two different ways to calculate proceeds based on either categories or hourly rates of Daylite users
- Define the hourly rates and hourly costs on a per employee basis.
- Define which appointment and task categories are being used for the analysis. Decide if a categories are billable, show on internal or external summaries or not being used at all
- Set time and financial budgets per project
- Define time and financial thresholds to keep track of your projects
- Define a factor to facilitate special hourly rates and rebates
- Define which Daylite users or groups are allowed to use reports or change Time&Budget preferences
- Run reports on groups of projects, opportunities, people and companies

System Requirements

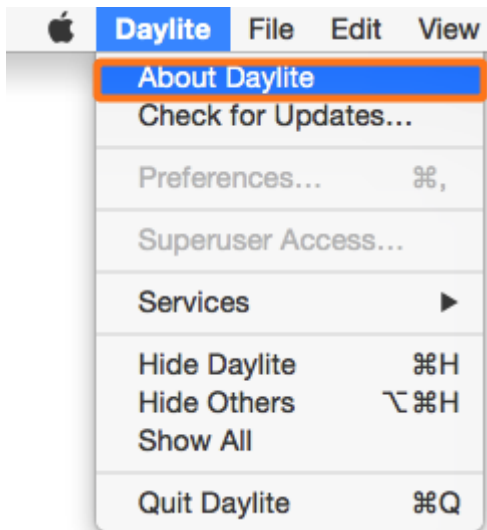
Operating System: OS X 10.8 or newer

Daylite Version: 4.2 or newer

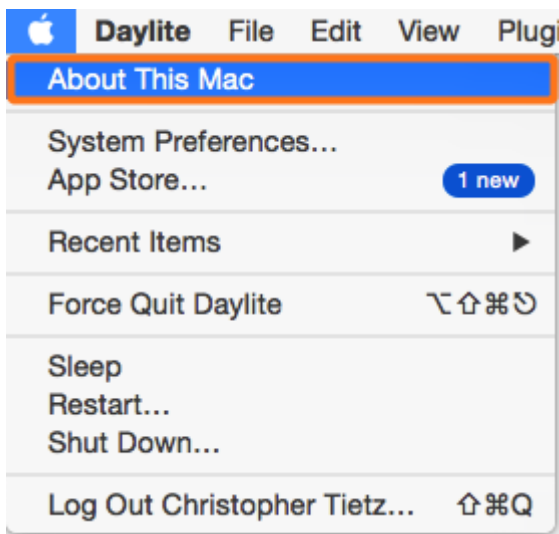
Setup

Installation

1. Time&Budget requires Daylite 4.2 or newer. To check your version open the Daylite menu -> About Daylite



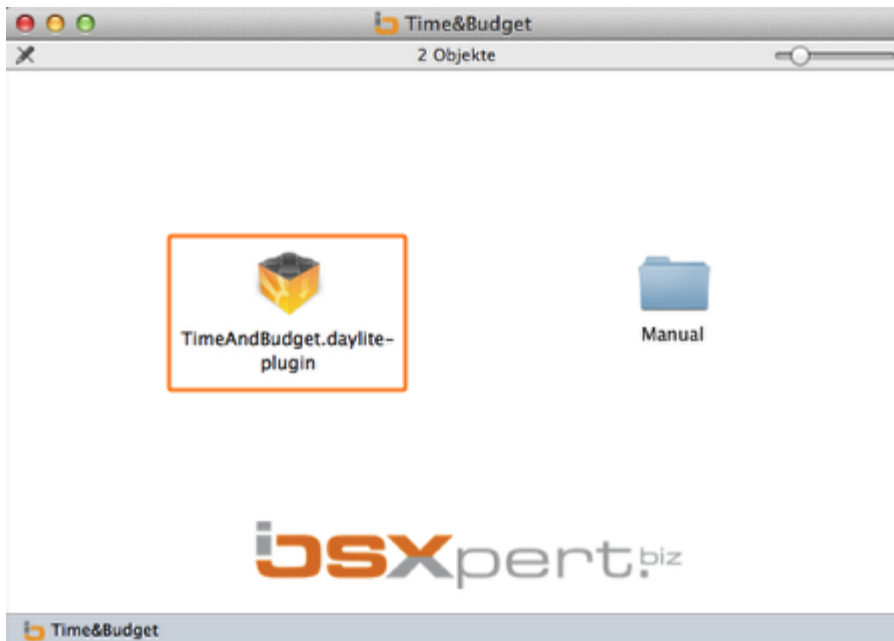
2. Time&Budget requires OS X 10.8 or newer. To check your OS X version select the Apple menu -> About this Mac



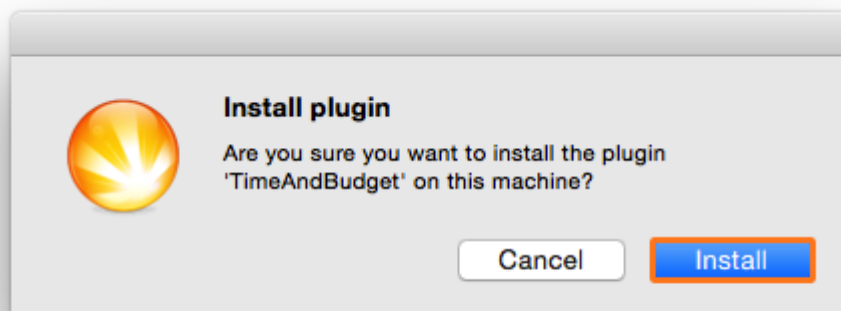
3. Open the Time&Budget.dmg file



4. Double click the TimeAndBudget.daylite-plugin file



5. Install the plug-in by clicking Install



6. To finalize the installation click Restart Daylite.

The plug-in needs to be configured before the first use. More info on the configuration you'll find in the next chapter [Licensing](#)



Success

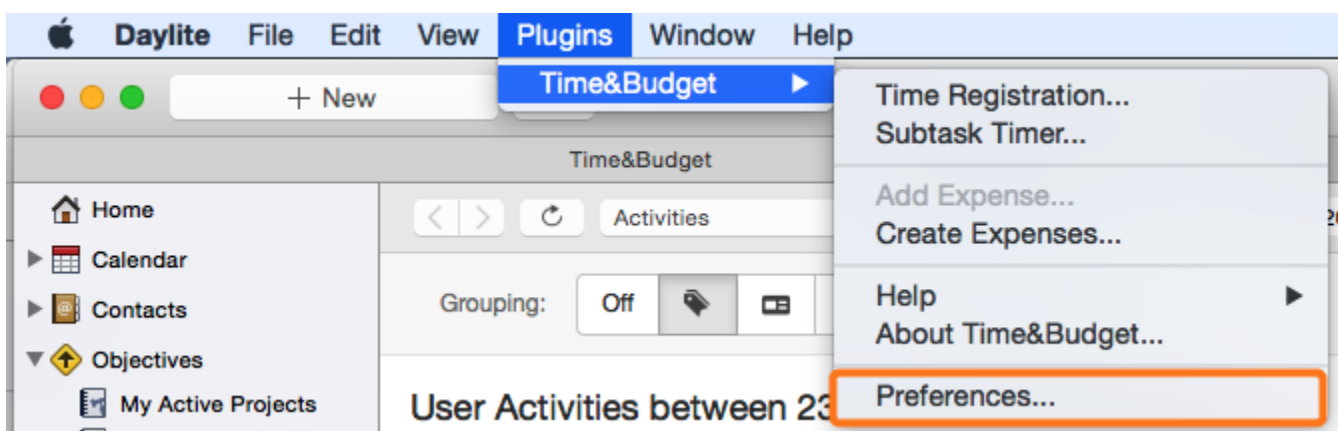
Plugin 'TimeAndBudget' Successfully installed.
Daylite will now restart for the changes to take effect.

Restart Daylite

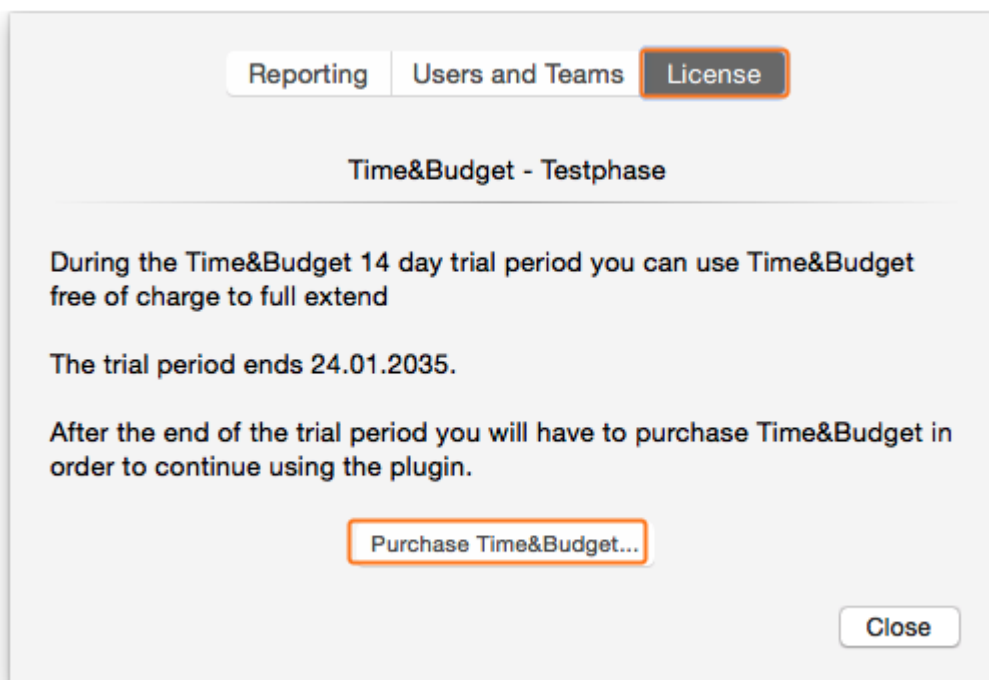
Licensing

Without entering a license code you can test Time&Budget during a 14 day trial period. After this period you will need a license code in order to use the plugin. In order to purchase Time&Budget, please follow these steps (given the plugin is already installed):

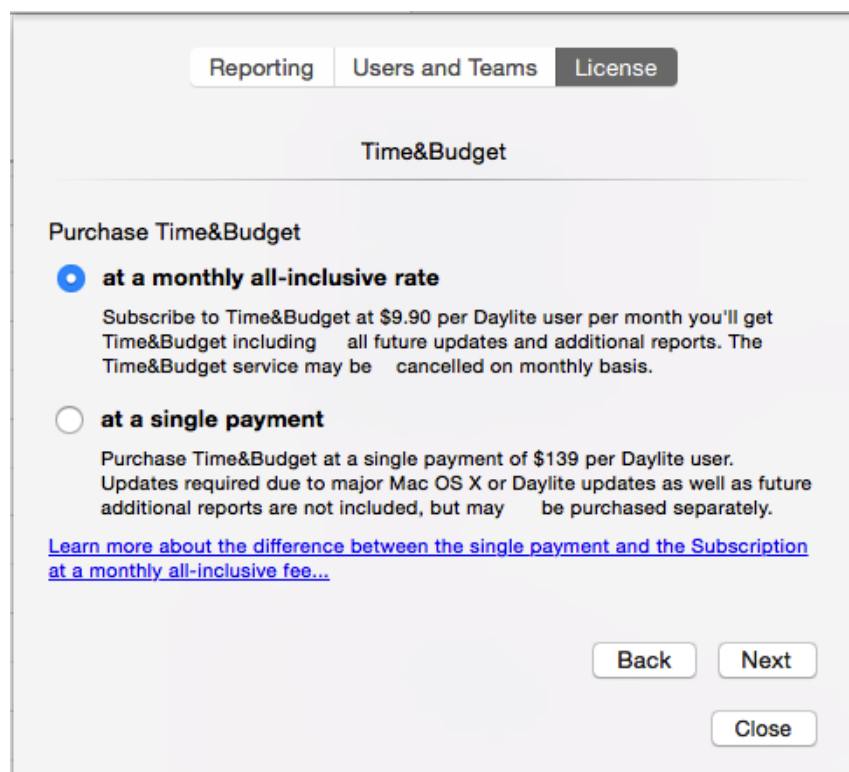
1. Start Daylite
2. In the Daylite menu select Plugins --> Time&Budget --> Preferences...



3. Select the License tab and click Purchase Time&Budget...



4. Select whether you would like to subscribe to Time&Budget as a monthly service or to purchase it at a single payment.

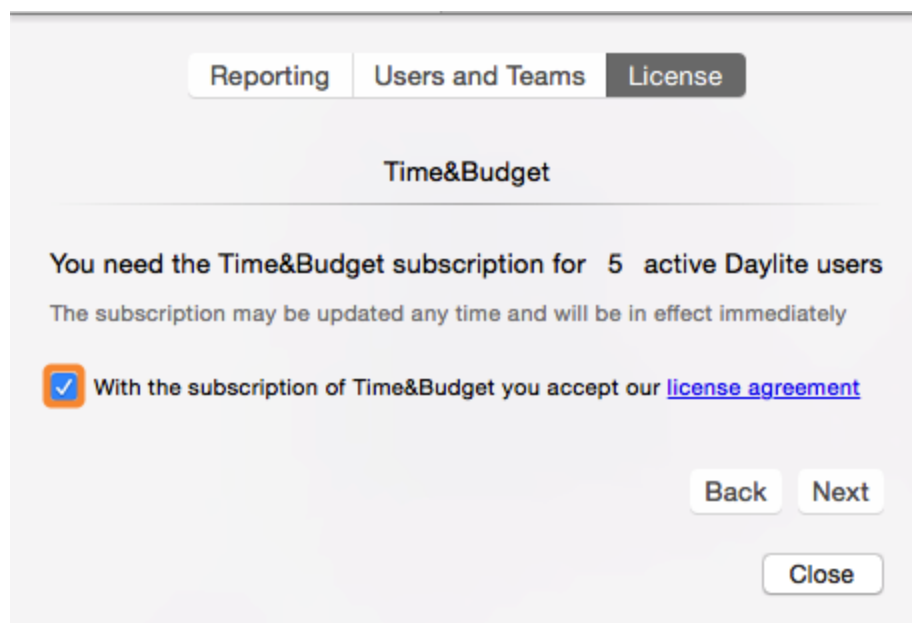


The screenshot shows a dialog box titled "Time&Budget" with three tabs: "Reporting", "Users and Teams", and "License". The "License" tab is selected. Below the tabs, the text "Purchase Time&Budget" is displayed. There are two radio button options: "at a monthly all-inclusive rate" (selected) and "at a single payment". The monthly option description states: "Subscribe to Time&Budget at \$9.90 per Daylite user per month you'll get Time&Budget including all future updates and additional reports. The Time&Budget service may be cancelled on monthly basis." The single payment option description states: "Purchase Time&Budget at a single payment of \$139 per Daylite user. Updates required due to major Mac OS X or Daylite updates as well as future additional reports are not included, but may be purchased separately." A link is provided: "[Learn more about the difference between the single payment and the Subscription at a monthly all-inclusive fee...](#)". At the bottom right, there are three buttons: "Back", "Next", and "Close".

Time&Budget Subscription

If you would like to subscribe to the Time&Budget , please do the following:

Accept the license agreement, click Next and follow the steps on the screen



The screenshot shows a dialog box titled "Time&Budget" with three tabs: "Reporting", "Users and Teams", and "License". The "License" tab is selected. Below the tabs, the text "You need the Time&Budget subscription for 5 active Daylite users" is displayed. Below this, it says "The subscription may be updated any time and will be in effect immediately". There is a checked checkbox followed by the text "With the subscription of Time&Budget you accept our [license agreement](#)". At the bottom right, there are three buttons: "Back", "Next", and "Close".

After completing all steps you'll see this window

Reporting Users and Teams Keywords **License**

Time&Budget - Subscription

Status: **active**

User Limit **3**

Expiration date: -

Monthly Cost: **29,70 \$**

Actions

Update subscription

Cancel subscription / Update payment method

Close

Purchase Time&Budget

If you would like to purchase Time&Budget , please do the following:

Accept the license agreement, click Next and follow the steps on the screen

Reporting Users and Teams **License**

Time&Budget

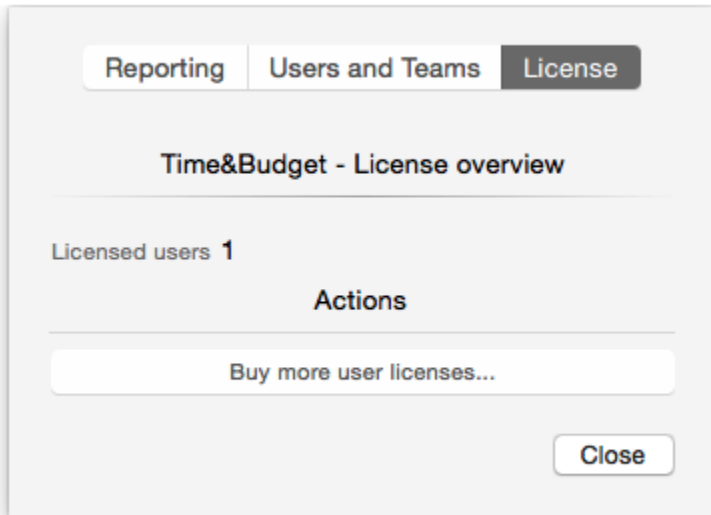
You need the Time&Budget licenses for **1** active Daylite users.

☒ With the subscription of Time&Budget you accept our [license agreement](#)

Back Next

Close

After completing all steps you'll see this window



Preferences

Define Billable, Non-Billable, Hidden and Neutral Categories

Billable Categories

Assign *billable categories* to those tasks and appointments you would like to charge for and also shall show on a bill of cost.

In our example we're going to use:

- Consulting
- Programming
- Seminar

Non-billable Categories

In many projects work is being performed that you can't or don't want to charge for. However, sometimes it makes sense to show the customer on a bill of cost how much work has been performed free of charge.

Assign *non-billable* categories to such tasks and appointments.

In our example we're going to use:

- Goodwill

Hidden Categories

There may be tasks and appointments you don't want to put on a bill of costs but you want them to be registered for internal purposes anyway - time and effort put into **marketing** or **administration** for example.

Hidden categories offer the option to register all auxiliary services, which have been performed during a project, as tasks or appointments without showing on any external print layouts.

In our example we're going to use:

- Administration

- Marketing

Neutral Categories

In addition to the already mentioned categories there may be tasks and appointments that are neither billable nor supposed to show on any internal or external document.

In our example we're going to use:

- Private
- Vacation

Calculation of Proceeds and Charged Prices Respectively)

Many reports in Time&Budget calculate not just the costs of registered activities but also the proceeds and the charged price respectively (shown as **Charge** and **Charge/h** in reports) Proceeds and charged prices are being calculated only if a category has been classified as "billable".

Time&Budget differentiates between two different ways to calculate proceeds:

1. Calculation of proceeds based on hourly rates of an employee

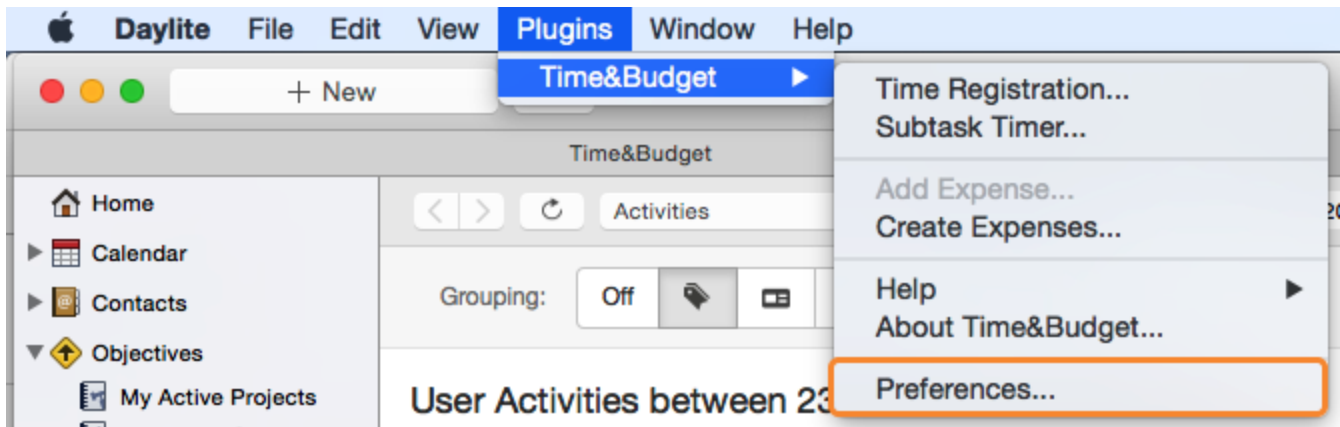
Select "Calculate proceeds based on User charges" to get proceeds calculated based on the hourly rates assigned to a particular Daylite user. The proceeds of every billable activity will be calculated dependent on the participants of an appointment or the user responsible for a task.

2. Calculation of proceeds based on categories

Select "Calculate proceeds based on Category" to get proceeds calculated based on rates assigned to a particular category. Proceeds will be calculated dependent on the category of a particular billable activity.

In order to define the categories and Time&Budgets interpretation thereof, please follow these steps:

1. Start Daylite
2. Navigate to the Daylite menu **Plug-Ins -> Time&Budget -> Preferences**



3. Select the Reporting tab

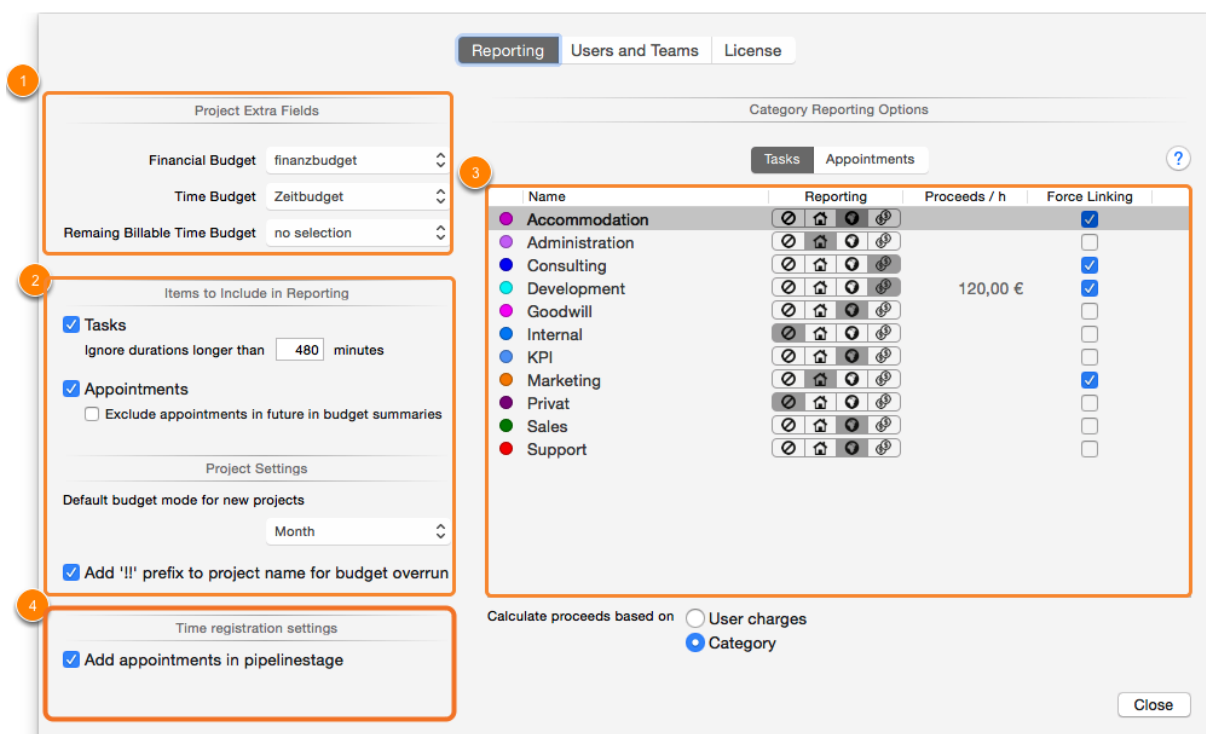
(1) Define the extra fields used for the financial and time budget within projects

Please note: (to configure extra fields, navigate to the Daylite preferences -> Custom Fields -> Projects)

(2) Check the appropriate boxes to determine if tasks, appointments and hourly rates shall be used with reports. You can also define here whether future appointments are being taken into consideration. Also define whether the project name shall be changed to !! Project Name if the project exceeds the budget to alleviate filtering for critical projects.

(3) Determine for tasks and appointments separately, which categories are *billable*, *non-billable*, *hidden* or *neutral*

(4) Determine whether appointments added via the Time Registration dialog are being added to the particular Daylite pipeline stage



Initial Settings to Calculate Proceeds (Charged Price)

- (1) Set proceeds and charged prices respectively for individual categories
- (2) Select if linking with an objective is mandatory when recording activities with Time Registration and Subtask Timer
- (3) Select whether the proceeds are being calculated based on hourly rates of Daylite users or based on categories (independent from the user's hourly rate)

ReportingUsers and TeamsLicense

Project Extra Fields

Category Reporting Options

Financial Budgetfinanzbudget

Time BudgetZeitbudget

Remaining Billable Time Budgetno selection

Items to Include in Reporting

Tasks

Ignore durations longer than480minutes

Appointments

Exclude appointments in future in budget summaries

Project Settings

Default budget mode for new projectsMonth

Add '!!!' prefix to project name for budget overrun

Time registration settings

Add appointments in pipelinestage

TasksAppointments

Name	Reporting	Proceeds / h	Force Linking
Accommodation			<input checked="" type="checkbox"/>
Administration			<input checked="" type="checkbox"/>
Consulting		150,00 €	<input checked="" type="checkbox"/>
Development		120,00 €	<input checked="" type="checkbox"/>
Goodwill			<input checked="" type="checkbox"/>
Holiday			<input type="checkbox"/>
Internal			<input type="checkbox"/>
Marketing			<input checked="" type="checkbox"/>
Privat			<input type="checkbox"/>
Sales			<input type="checkbox"/>
Seminar		120,00 €	<input checked="" type="checkbox"/>
Support			<input checked="" type="checkbox"/>
Vaccation			<input type="checkbox"/>

Calculate proceeds based on

☐ User charges

☒ Category

Close

Classification of Categories

This table depicts the four reporting classifications and their functions in respect of visibility, cost and profit generation

reporting classification			
visible in internal reports	x	x	x
visible in external reports		x	x
generates costs	x	x	x
generates direct profit			x

Time&Budget 2 for Daylite

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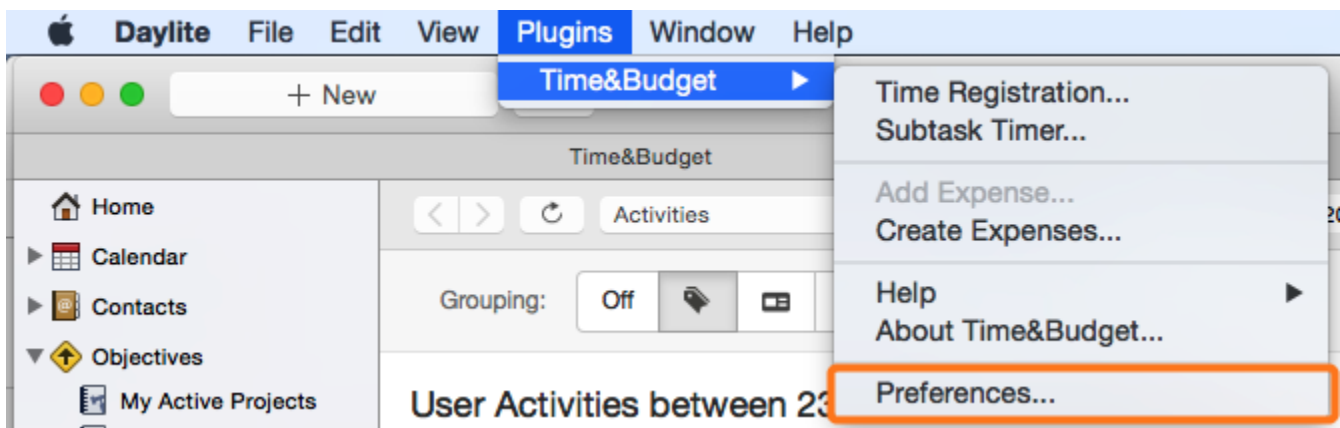
Hourly Rates

External and internal hourly rates

In the Time&Budget preferences you can set the hourly wage of a Daylite user (internal rate) and the hourly rate a client is being charged with (external rate, profit, charged price and sales price respectively)

Internal rates are being added to the costs of a project, the external rates are being added to the profit of a project as long "Calculate proceeds based on User charges" has been selected. (see [Define Billable, Non-Billable, Hidden and Neutral Categories](#))

1. Start Daylite
2. Navigate to the Daylite menu Plugins -> Time&Budget -> Preferences



3. Select the Users and Teams tab

Here you can set the permissions of Daylite teams as well as the internal and external rates of particular Daylite users.

- (1) Select the Daylite user for whom you'd like to set the hourly rates
- (2) Enter the hourly wage of the Daylite user (internal rate)
- (3) Enter the hourly charge (external rate)

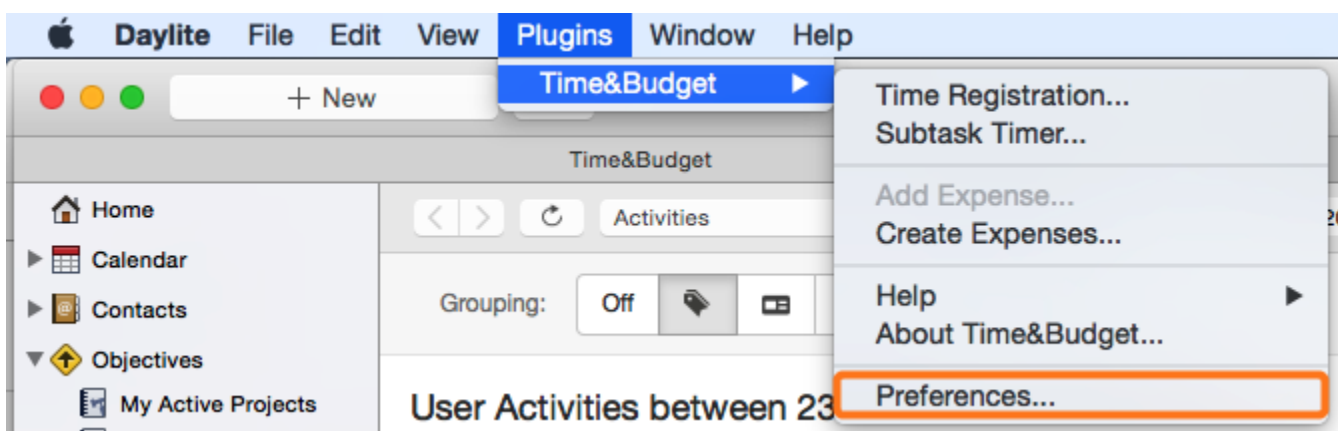
In our example shown here:

Harold Leary's hourly wage is \$40, the customer is being charged \$150 per hour.

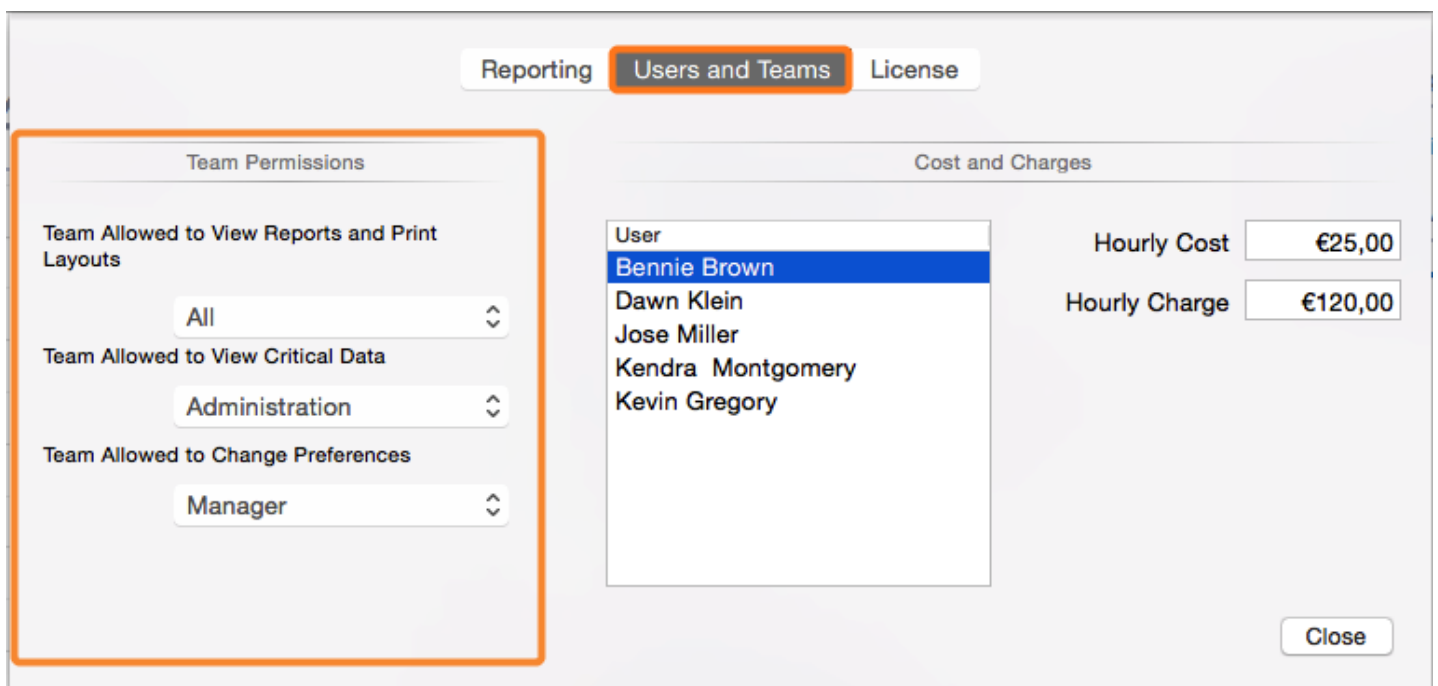
Permissions

The Time&Budget permissions define which Daylite team is allowed to use reports and print layouts, which team is allowed to view critical data (costs and profit) and which team is allowed to view and change Time&Budget preferences.

1. Start Daylite
2. Navigate to the Daylite menu Plugins -> Time&Budget -> Preferences



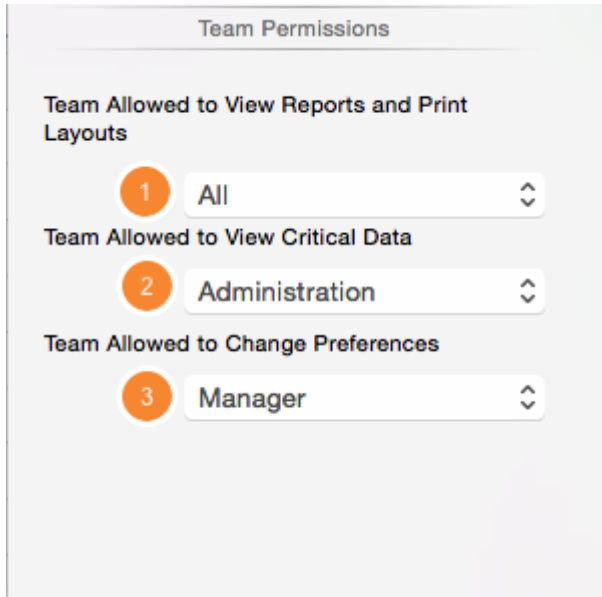
3. Select the Users and Teams tab



Determine:

- (1) - which Daylite Team is allowed to use reports and print layouts
- (2) - which Daylite Team is allowed to view critical data (costs and profit)
- (3) - which Daylite Team is allowed to change the plugin preferences

In order to create new teams, navigate to the Daylite preferences Users & Teams -> Teams



In our example shown here:

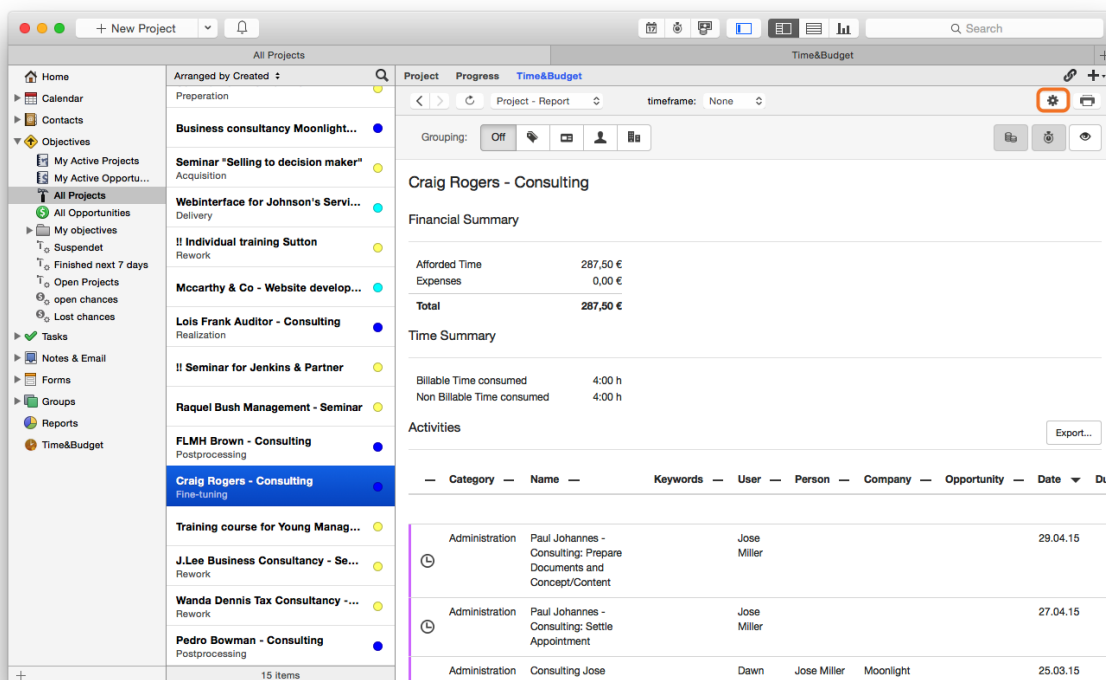
The whole Daylite team is allowed to use reports and print layouts. Team 'Administration' has access to critical data and the plugin preferences. 'Manager' is the only team allowed to access and change preferences.

Budget Settings

The budget settings are accessible from any Time&Budget tab in Daylite projects, opportunities, companies and people.

Budget Settings

1. To access the budget settings, click the Time&Budget tab and click the cog wheel



(1) Determine which timeframe is being used for the calculation

Please note: please make sure to set the Budget Mode according to the selected timeframe

(2) Financial budget

(3) Contribution margin

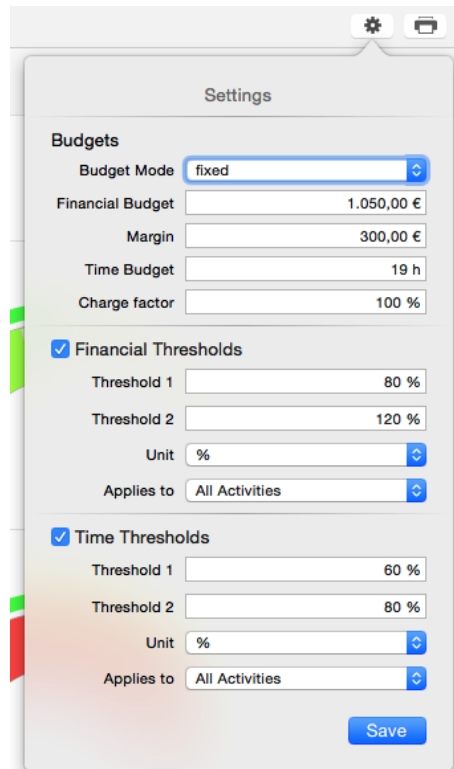
(4) Time budget

(5) Charge factor (to facilitate special hourly rates and rebates)

(6) Time thresholds

(7) Financial thresholds

Please note: the time & financial budgets themselves are being considered to be thresholds. The thresholds can be set to be either a percentage or the corresponding unit (hour or currency)



The screenshot shows a 'Settings' dialog box with the following sections and values:

- Budgets**
 - Budget Mode: fixed
 - Financial Budget: 1.050,00 €
 - Margin: 300,00 €
 - Time Budget: 19 h
 - Charge factor: 100 %
- ☒ **Financial Thresholds**
 - Threshold 1: 80 %
 - Threshold 2: 120 %
 - Unit: %
 - Applies to: All Activities
- ☒ **Time Thresholds**
 - Threshold 1: 60 %
 - Threshold 2: 80 %
 - Unit: %
 - Applies to: All Activities

A 'Save' button is located at the bottom right of the dialog.

Time Registration

Time Registration

Time Registration offers the options to create appointments from scratch or to copy over task titles from worklist or project tasks to a new appointment.

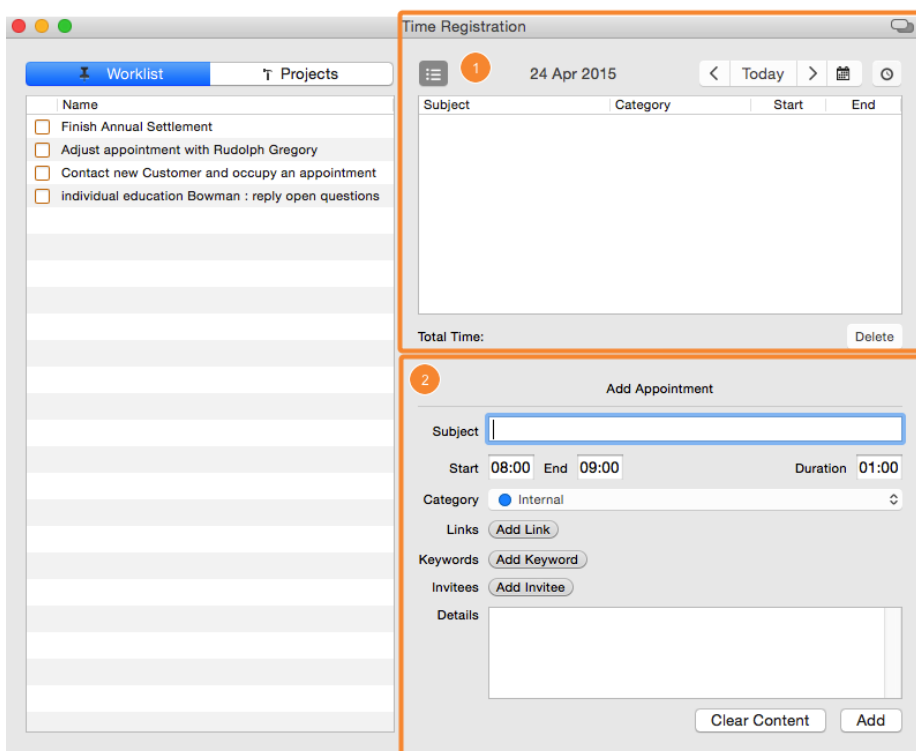
1. Click this icon to open the Time Registration



General

(1) Appointment schedule

(2) Add new appointment



Appointment Schedule

(1) Show Daylite worklist to copy over task titles to a new appointment

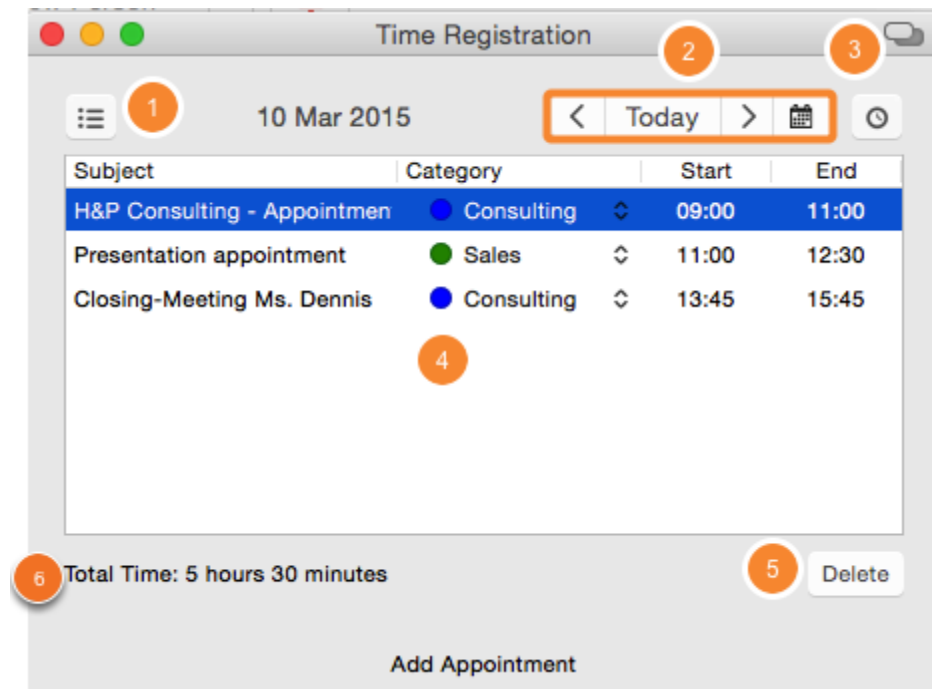
(2) Use the arrows to navigate back and forth between particular days. Click Today to get back to the current date

(3) Show details of an appointment selected in the appointment schedule (4)

(4) Appointment schedule of selected day

(5) Delete a selected appointment

(6) Displays the total duration of all appointments registered via Time&Budget (depends on categories and the Time&Budget preferences)



Add Appointments

For the new appointment you can

(1) - enter a title

(2) - enter start time, end time and/or duration

(3) - select appropriate category

(4) - link to Daylite objects

(5) - select keywords

(6) - add invitees

(7) - enter appointment details

(8) Reset all fields

(9) Create appointment

Subject 1

Start End 2 Duration

Category ☐ Internal 3

Links 4

Keywords 5

Invitees 6

Details 7

8 9

Edit Appointments

(1) Show appointment details

(2) Edit these right in Time&Budget

Time Registration

10 Mar 2015 < Today >

Subject	Category	Start	End
H&P Consulting - Appointmen	Consulting	09:00	11:00
Presentation appointment	Sales	11:00	12:30
Closing-Meeting Ms. Dennis	Consulting	13:45	15:45

Total Time: 5 hours 30 minutes

Add Appointment

Subject

Start End Duration

Category ☐ Consulting

Links

Keywords

Invitees

Details

Appointment Activity

H&P Consulting - Appointment

category ☐ Consulting

starts 10/ 3/2015 09:00

duration 2 hours

ends 10/ 3/2015 11:00

timezone Central European Time

show as Busy

my status ☒ Accepted

invitees ☒ Jose Miller

linked

type Appointment

status Confirmed

owner Jose Miller

created Jose Miller
12 Mar 2015 12:34

modified Today 17:39

2

Usage of Time Registration in Conjunction with Daylite Worklist

(1) Show/hide Daylite Worklist

(2) Select a task

(3) Add the time recorded for a particular task as an appointment. The appointment can be edited as described [here](#).

Please note: the duration of the appointment is being determined by the cumulated duration of all recorded timeframes / subtasks

The screenshot shows the 'Time Registration' application window. The left sidebar is titled 'Worklist' and contains a list of tasks. The right panel is titled 'Projects' and shows a list of appointments. A 'Total Time' summary is visible below the appointments list. At the bottom, there is an 'Add Appointment' form with fields for Subject, Start, End, Duration, Category, Links, Keywords, Invitees, and Details.

Subject	Category	Start	End
H&P Consulting - Appointmen	Consulting	09:00	11:00
Presentation appointment	Sales	11:00	12:30
Closing-Meeting Ms. Dennis	Consulting	13:45	15:45

Total Time: 5 hours 30 minutes

Add Appointment

Subject: Finish Annual Settlement

Start: 11:00 End: 12:00 Duration: 01:00

Category: Internal

Links: Finish Annual Settlement, Moonlight Inc. Add Link

Keywords: Add Keyword

Invitees: Add Invitee

Details:

Clear Content Add

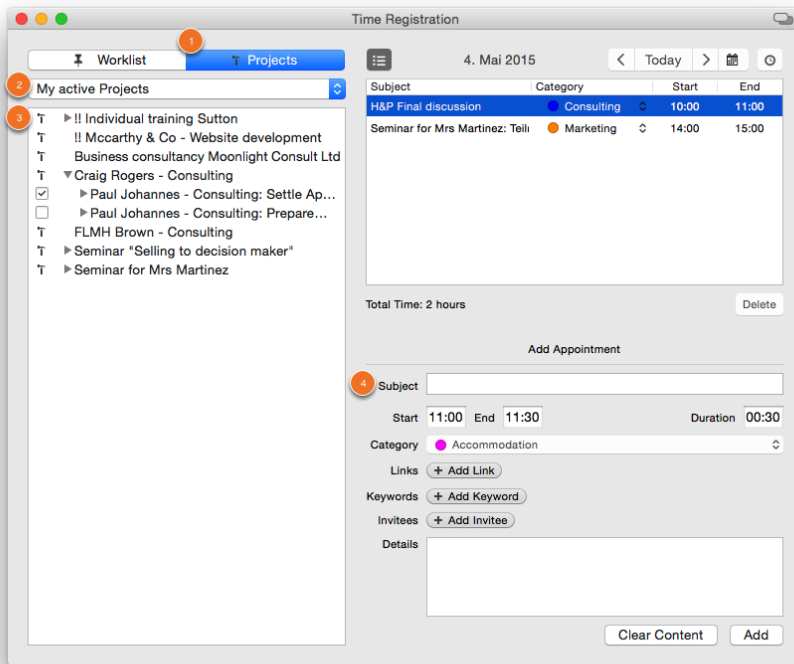
Usage of Time Registration in Conjunction with Daylite Projects

(1) Show Daylite worklist (as described [here](#)) and select the Project tab

(2) Use existing lists and smart lists to structure and select your tasks quicker

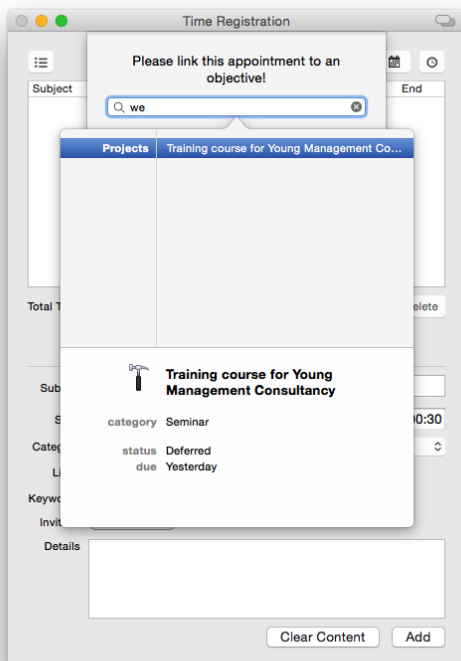
(3) Select a project or expand it in order to select the linked task

(4) Add recorded time as an appointment in Time Registration. This works as described [here](#).



Data Quality

When recording an activity with Time Registration, Time&Budget checks whether the selected category requires linking with an objective (see [Define Billable, Non-Billable, Hidden and Neutral Categories \(Initial Settings to Calculate Proceeds\)](#)). If linking is mandatory but no link has been provided yet, Time&Budget prompts you to do so.



Subtask Timer

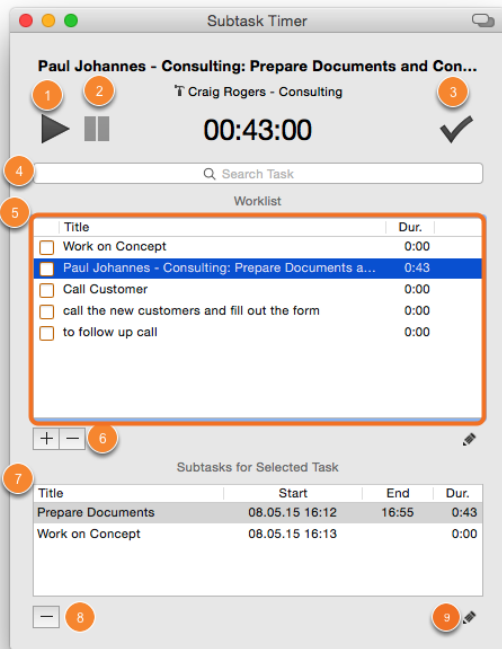
Subtask Timer provides a on-the-minute recording of jobs and activities. This is being done by the automated creation of subtasks in Daylite.

1. Click this icon to open the Subtask Timer



Overview

- (1) Start time recording for task selected from your worklist (5)
- (2) Pause time registration for selected task
- (3) Stop time registration for selected task and mark selected as done
- (4) Use the search to add tasks to your worklist (5)
- (5) Tasks from Daylite worklist
- (6) Add or remove tasks
- (7) Subtask overview
- (8) Remove selected subtasks
- (9) Edit selected subtasks



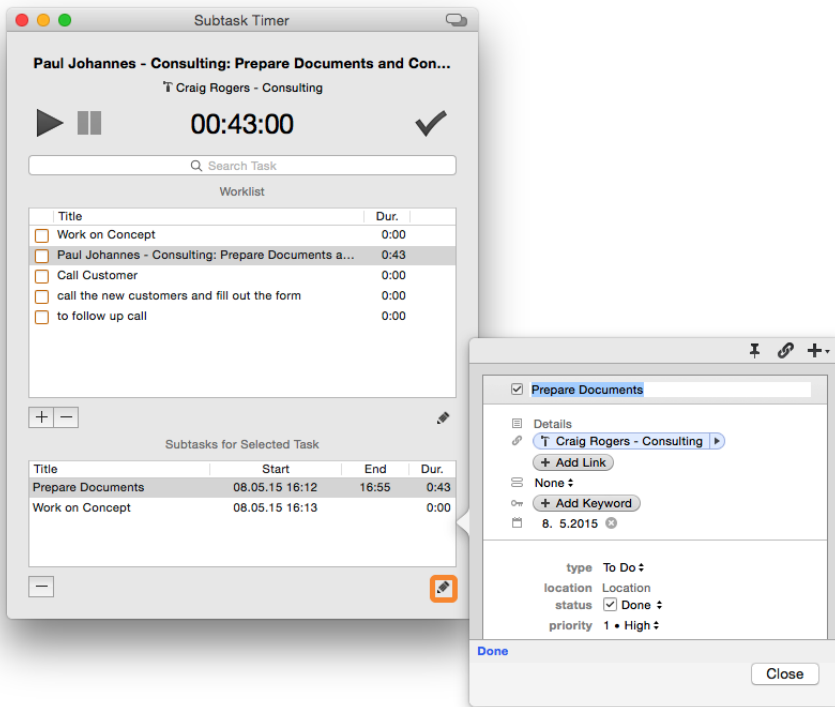
Register Tasks

If a task is being completed in several steps, Subtask Timer creates subtasks

The default title of such a subtask is Recorded by Subtask Timer.

Title and details of tasks and subtask can be edited by clicking the **Pencil** icon.

Recorded times are being rounded up to the next minute.



Cost Registration

Registration of Third-Party Costs

Beside the work that is being performed, there are also costs involved in a project for example, when goods and services are being purchased from third parties. This also applies to travel and other expenses.

Time&Budget makes it possible to register those third-party costs and to link them with a project. This enables you to analyze the entire costs of a project.

Please note: the following instructions also apply to opportunities, people and companies. To simplify matters, the following refers solely to projects.

Registration of Third-Party Costs

1. Take a click on this icon to open to Add Expenses

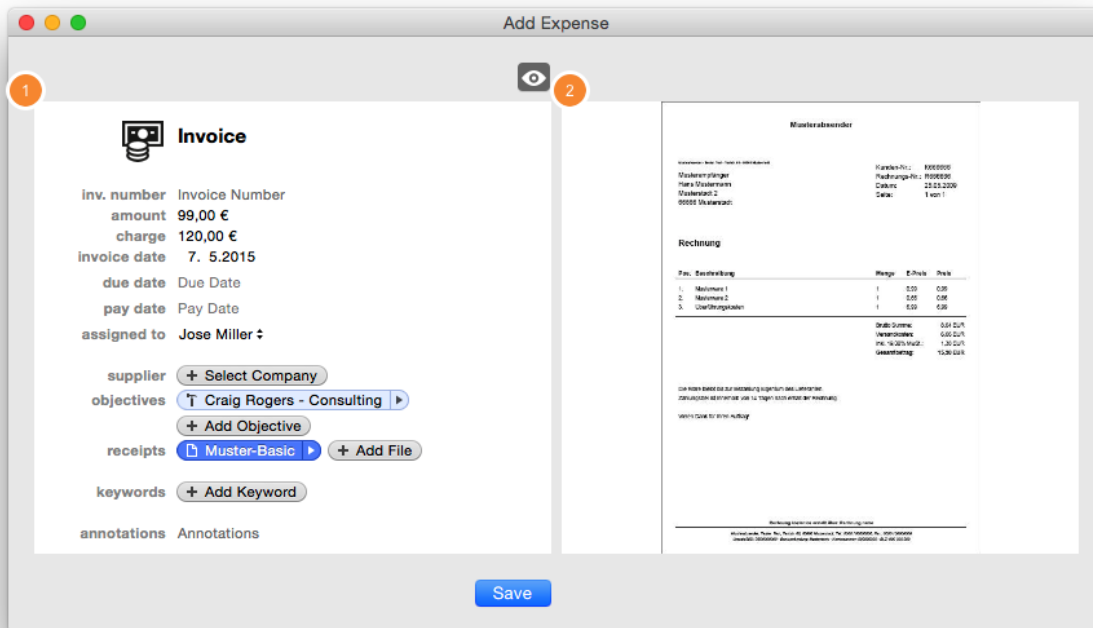
Please note: It is possible to add this function to the contextual menu in the Daylite preferences



(1) Add information like title, invoice number and total amount as well as linked objectives, keywords and details

(2) If you have added a receipt or invoice as a PDF file, you will see a preview here

Please note: the available keywords are the Daylite keywords for notes

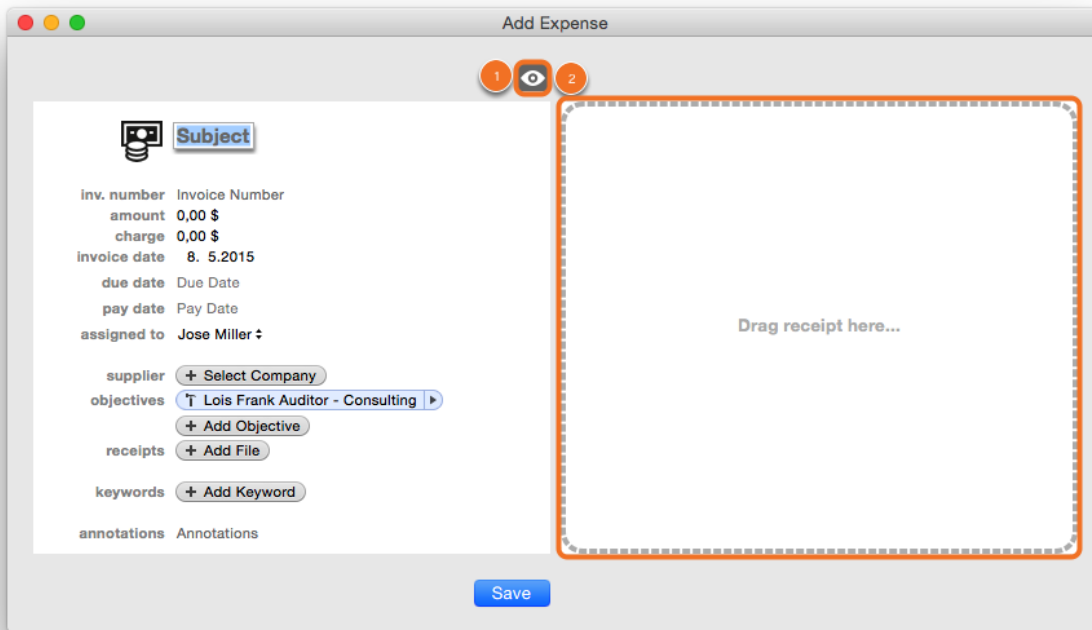


Usage of the Drop Zone

Thanks to the comfortable drop zone, documents can be added by simply dragging it onto the drop zone.

(1) Open the preview pane

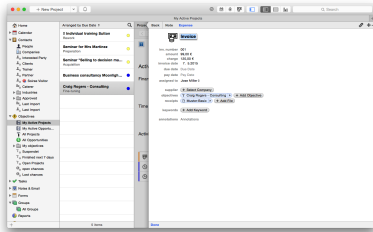
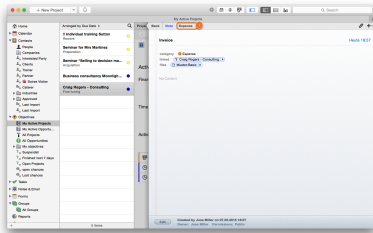
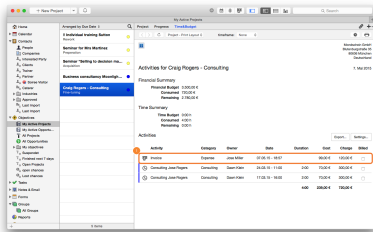
(2) Drag & drop a document (e.g a PDF file of an invoice or a receipt) onto the preview pane. The document will now be added to Daylite and linked with the expenses details.



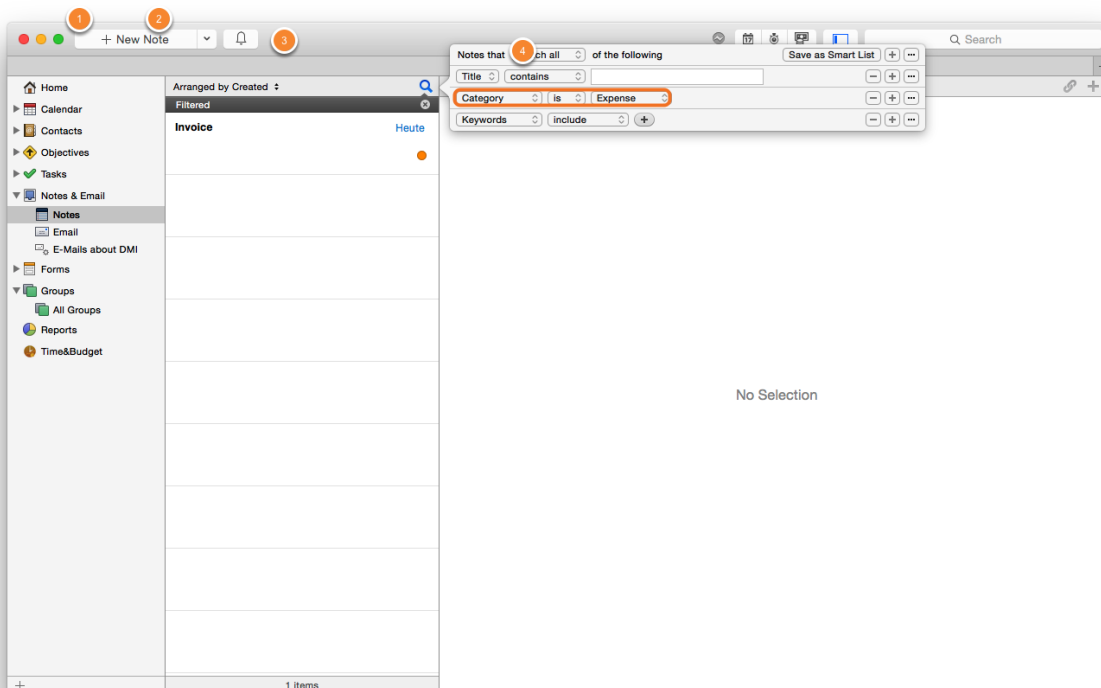
Access Previously Registered Third-Party Costs

Registered third-party costs are being saved as a note with the category "Expense" A special view (tab) facilitates access and changes to the registered data.

- (1) To edit registered expenses, click the name of the expense in a Time&Budget report
- (2) Select the Expenses tab in the following slide-over an edit the expense and access passible documents



Please note: Another way to access and edit registered expenses is by selecting Notes & Email in the Daylite side bar and filtering the category Expenses and a particular project.



Reporting

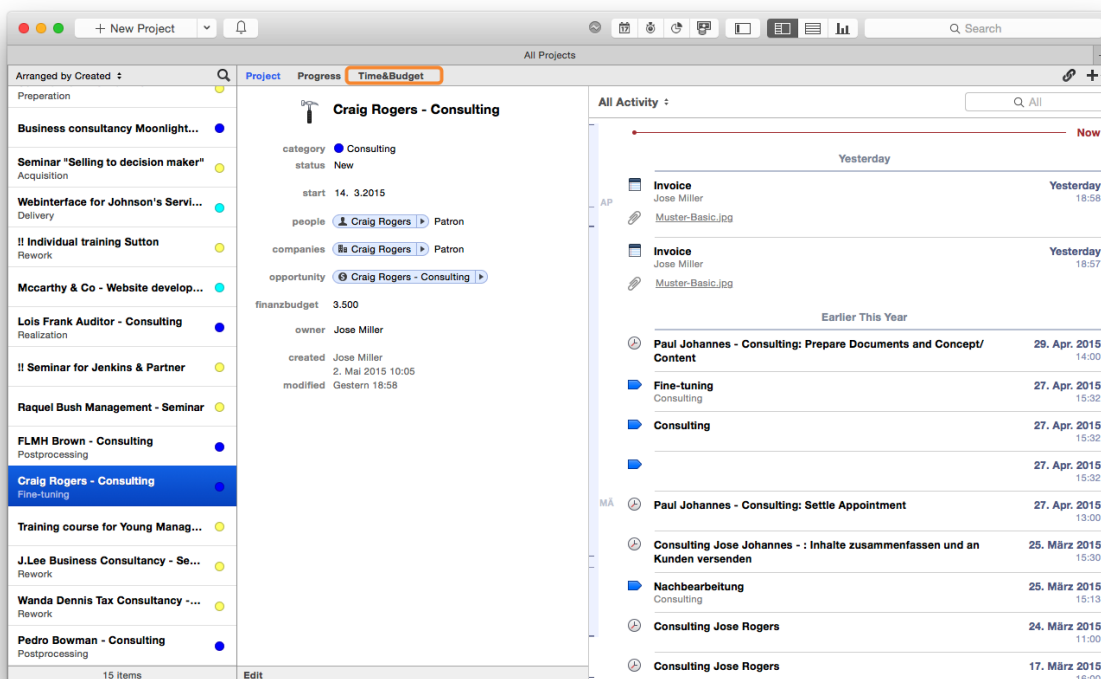
Time&Budget Tab

The Time&Budget Tab

See the effort/revenue ratio on people, companies, projects and opportunities at a glance.
In our example we show just companies and projects

Time&Budget Tab

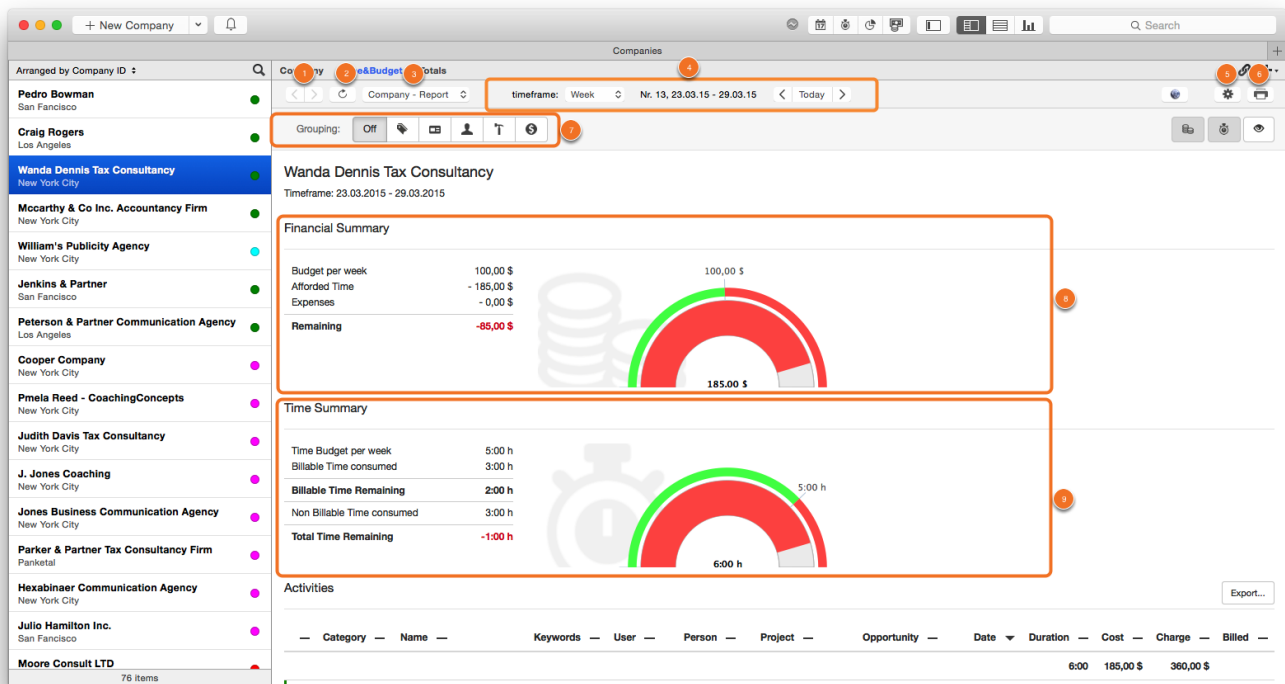
1. Select a person, a company, an opportunity or a project in Daylite and select the Time&Budget tab



Company Overview

- (1) Back & forward
- (2) Refresh
- (3) Select between an internal or external summary
- (4) Select a timeframe
- (5) Determine the [Budget Settings](#)

- (6) Print current view
- (7) Group by different Daylite objects
- (8) Financial summary
- (9) Time summary



Project Overview

1. Select a Daylite project and click the Time&Budget tab

Project Progress **Time&Budget**

Individual training Sutton

category Seminar
status In Progress
due 12/ 3/2015
start 13/ 2/2015

people **Jamie Sutton** Patron **7 APR 2015**
Jose Miller Coach / Trainer

companies **Jamie Sutton M.Ba Tax Cons...** Patron
Moonlight Inc. Organizer

groups **My Project**

finanzbudget 1.200
owner Jose Miller
created Jose Miller
20 Feb 2015 12:16
modified Today 18:14

All Activity :

Later Today

- ☐ Individual training Sutton: get feedback 9 Mar 2015
Bennie Brown
- ☐ individual education Bowman : reply open questions 6 Mar 2015
Jose Miller

Now

Earlier This Year

- ☐ Seminar - Individual training Sutton 4 Apr 2015 10:00
- ☐ Seminar - Individual training Sutton 4 Apr 2015 10:00
- ☐ Appointment with Mrs. Sutton 12 Mar 2015 09:00
wants to know something about the project
- ☐ Seminar - Individual Training Sutton 5 Mar 2015 10:00
- ☐ Individula training Sutton : create Moderation 4 Mar 2015 11:00
- ☐ My Project 2 Mar 2015
- ☐ Individual training Sutton: clarify technical circumstances 2 Mar 2015 11:00
- ☐ Individual training Sutton: Information about participants 26 Feb 2015 09:45
- ☒ Individual training Sutton: Book Hotel 19 Feb 2015 10:50
Kendra Montgomery

Internal Project Summary

Select Internal Project Summary

(1) Group objects of the report

It is possible to group and filter your data as desired. More details are available in chapter [Global](#).

My Active Projects

Project Progress **Time&Budget**

Grouping: Off

Craig Rogers - Consulting

Financial Summary

Fixed Budget	3.500,00 \$
Margin	- 2.500,00 \$
Afforded Time	- 287,50 \$
Expenses	- 99,00 \$
Remaining	613,50 \$

Time Summary

Billable Time consumed	4:00 h
Non Billable Time consumed	4:00 h

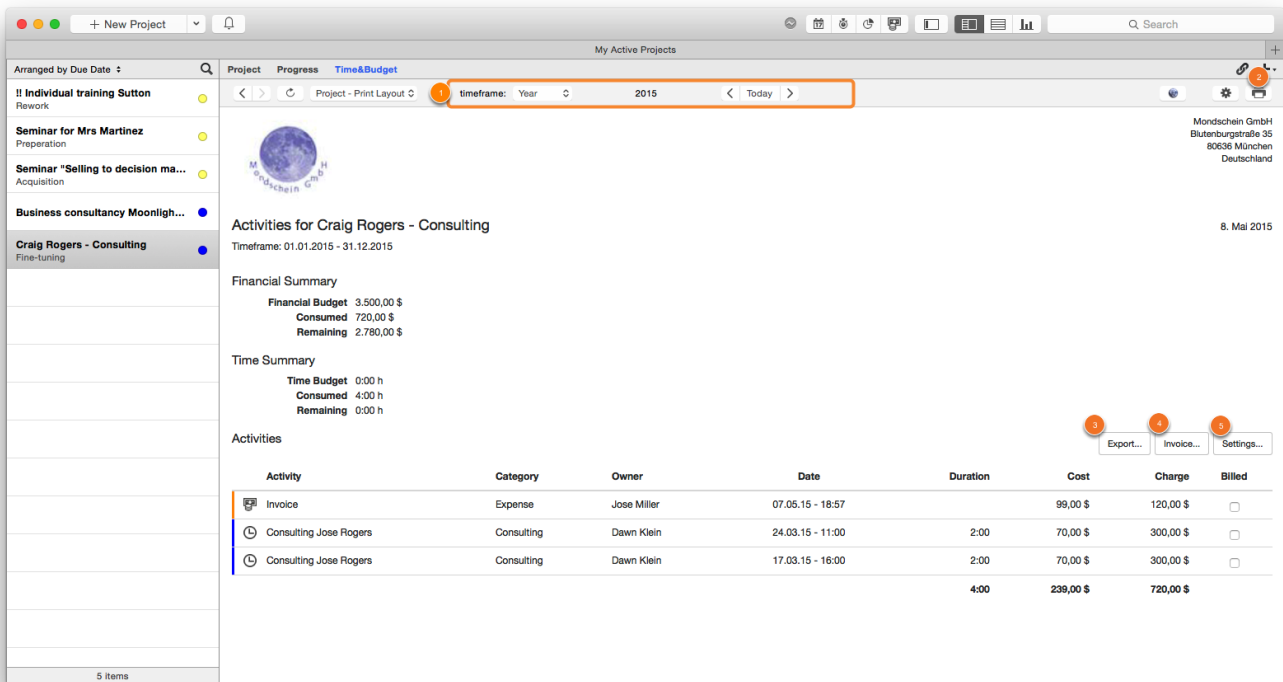
Activities

Category	Name	Keywords	User	Person	Company	Opportunity	Date	Cost	Charge	Billed
Expense	Invoice		Jose				07.05.15	386,50 \$	720,00 \$	

External Project Summary

Select External Project Summary

- (1) Determine timeframe
- (2) Print displayed report any time to hand out to a client
- (3) Click to [export table](#)
- (4) Click to [transfer data](#) to connected invoicing system



Planned and Actual Time

Select the Planned and Actual Time report

- (1) Based on a task's estimated duration (a standard Daylite functionality, available in the task edit card), this report shows the total amount of the project's estimated time. The report groups the result by pipeline stage and parent task.
- (2) If you have used Time&Budget's [Subtask Timer](#), the recorded time will be offset against the estimated time. This gives you a target-performance comparison to keep track of your projects.
- (3) Grouping is based on project pipeline stages, parent tasks and subtasks respectively. This provides you with a target-performance comparison in any desired level of detail.

+ New Project

My Active Projects

Search

Arranged by Due Date

Project Progress Time&Budget

!! Individual training Sutton

Rework

Seminar for Mrs Martinez

Preparation

Seminar "Selling to decision ma...

Acquisition

Business consultancy Moonligh...

Craig Rogers - Consulting

Fine-tuning

Planned and Actu...

Craig Rogers - Consulting

created on 08.05.2015

Estimated Time (6:20 h)

Recorded Time 1:12 h

Estimated Time Remaining 5:08 h

Miscellaneous

Fine-tuning (6:20) 1:12

✓ Paul Johannes - Consulting: Settle Appointment (0:20) 0:29

✓ Paul Johannes - Consulting: Prepare Documents and Concept/Content (5:00) 0:43

✓ Prepare Documents (1:00) 0:43

✓ Work on Concept (2:00) 0:00

Realization

Postprocessing

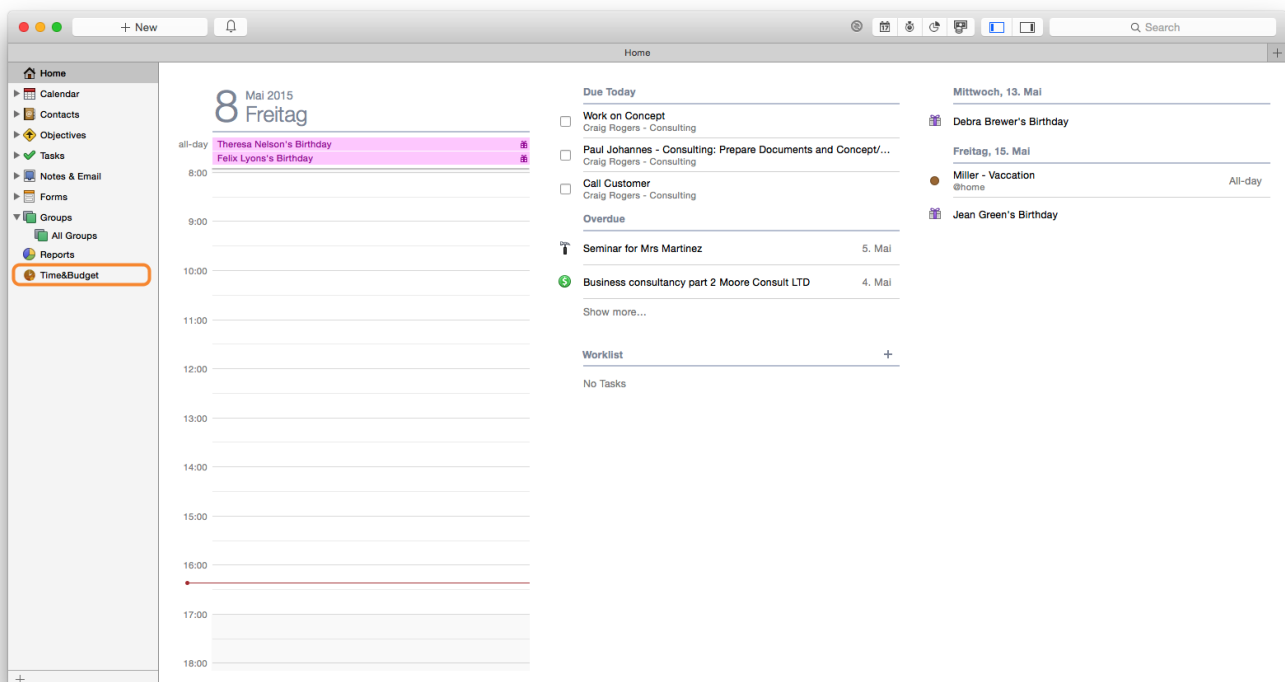
5 Items

Global

See your business from a different perspective.

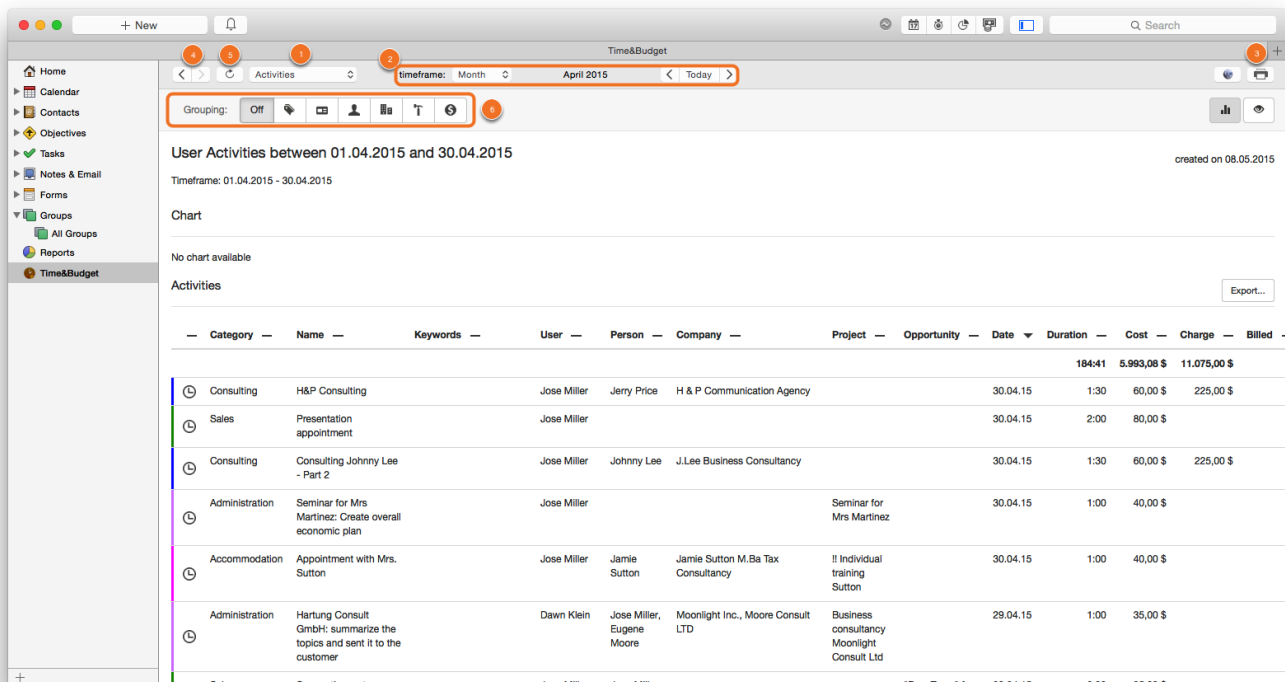
Get a summary of all activities (including third-party costs), as well as an overview of project thresholds and data quality.

Select Time&Budget from the Daylite sidebar.



Activities

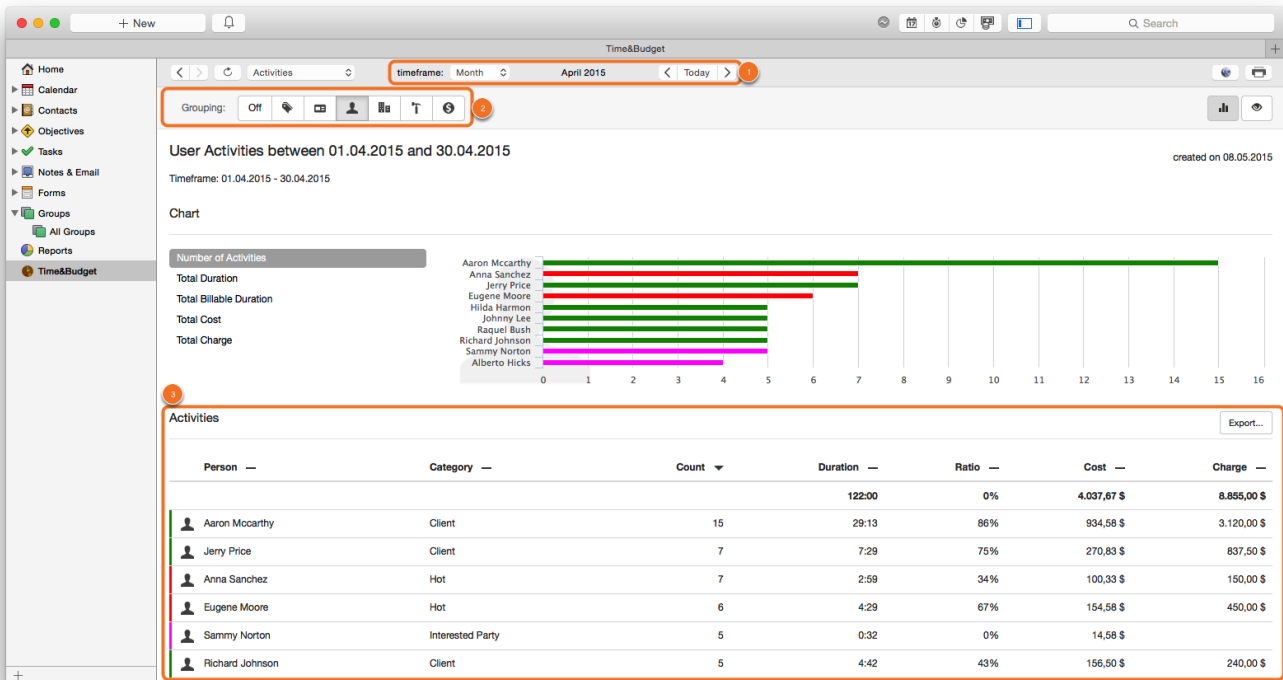
- (1) Select report
- (2) Select timeframe
- (3) Print current view
- (4) Back & forward
- (5) Refresh
- (6) Group shown objects



Group Objects

Example: To show activities of a particular category of a particular user within a selected timeframe, please do the following:

- (1) Select timeframe
- (2) Select User
- (3) Select desired Daylite user



Filter has been applied

Time&Budget

timeframe: Month April 2015

Grouping: Off

Filters: Aaron McCarthy

User Activities between 01.04.2015 and 30.04.2015

Timeframe: 01.04.2015 - 30.04.2015

Chart

No chart available

Activities

Category	Name	Keywords	User	Person	Company	Project	Opportunity	Date	Duration	Cost	Charge	Billed
									29:13	934,58 \$	3.120,00 \$	
Development	Mccarthy & Co Inc. Accountancy Firm - Development Website: Bugs identifizieren und beheben		Kevin Gregory	Aaron McCarthy	Mccarthy & Co Inc. Accountancy Firm	Mccarthy & Co - Website development		24.04.15	4:00	120,00 \$	480,00 \$	
Administration	Mccarthy & Co Inc. Accountancy Firm - Development Website: Implementation of the transfer		Jose Miller, Kevin Gregory	Aaron McCarthy	Mccarthy & Co Inc. Accountancy Firm	Mccarthy & Co - Website development		20.04.15	2:00	70,00 \$		
Consulting	Final discussion		Jose Miller	Aaron McCarthy	Mccarthy & Co Inc. Accountancy Firm			17.04.15	1:00	40,00 \$	150,00 \$	
Administration	Mccarthy & Co Inc. Accountancy Firm - Development Website: Set delivery date		Kendra Montgomery	Aaron McCarthy	Mccarthy & Co Inc. Accountancy Firm	Mccarthy & Co - Website development		16.04.15	0:30	10,00 \$		
Development	Mccarthy & Co Inc. Accountancy Firm - Development Website: Usability & Last		Kevin Gregory	Aaron McCarthy	Mccarthy & Co Inc.	Mccarthy & Co - Website		14.04.15	1:00	30,00 \$	120,00 \$	

To add a filter for the category:

(1) Select one of the shown Categories

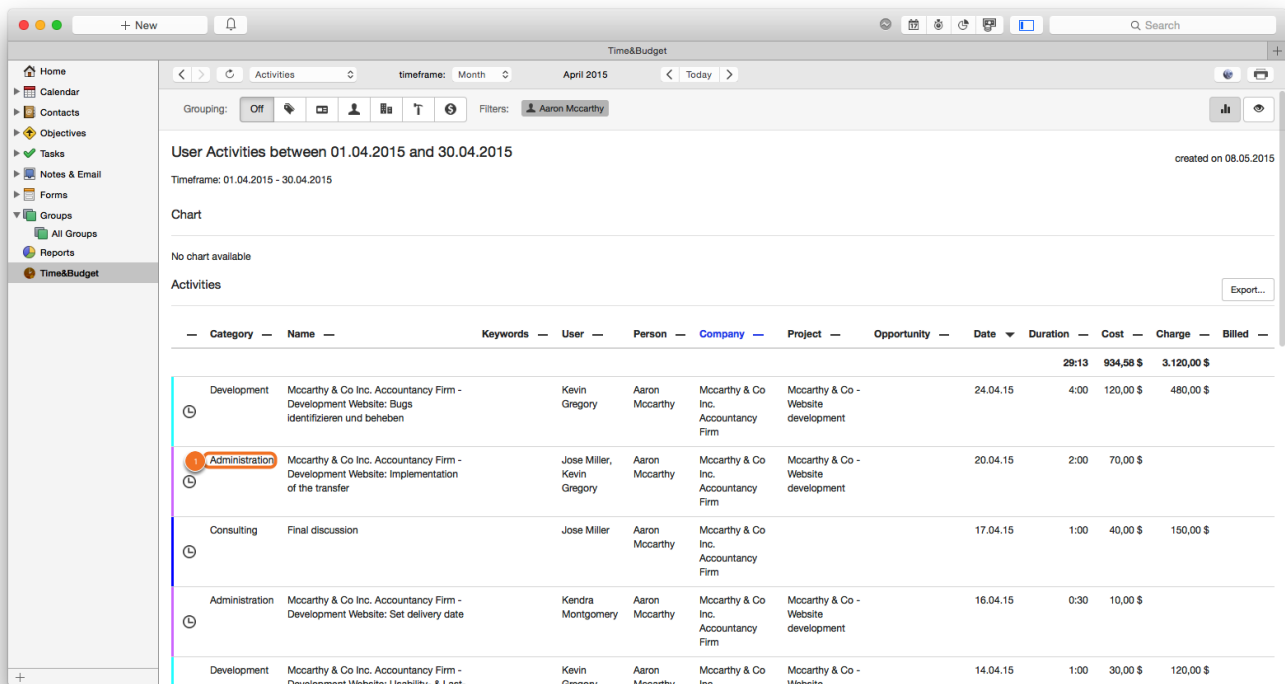
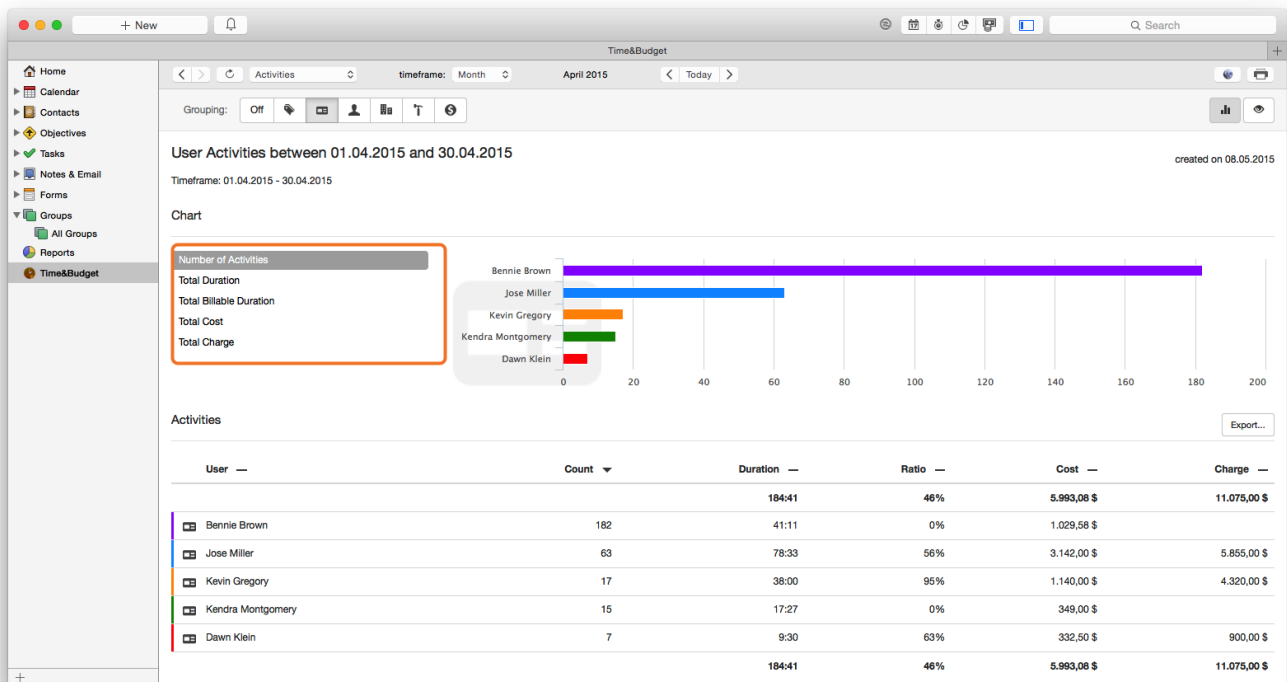


Diagram Options

The following diagram options are available

1. Number of activities
2. Total duration
3. Total duration of billable activities
4. Total of costs
5. Total of proceeds



Project Tresholds

If you have applied thresholds to projects, you can keep track of them here. To do so, select report **Project Tresholds (1)** in the global part (Daylite sidebar) of Time&Budget.

Your projects are being grouped by time and/or financial thesholds depending on which thresholds have been applied to a given project. Color codes **(2)** help you to recognize projects that exceeded their thresholds at a glance.

(3) Display or hide available columns

(4) Export the visible table as a CSV or Excel file, print it or save it as a PDF file

Project Thresholds

Time Thresholds

Project	Owner	Category	No. Act.	Budget	Used Budget	Rem. Budget	Cost	Charge	Thrs.
			10	25:00	23:30	1:30	720,00 \$	2.520,00 \$	
!! McCarthy & Co - Website development	Jose Miller	Development	10	25:00	23:30	1:30	720,00 \$	2.520,00 \$	2 / 3
			10	25:00	23:30	1:30	720,00 \$	2.520,00 \$	

Financial Thresholds

Project	Owner	Category	No. Act.	Budget	Used Budget	Rem. Budget	Charge	Thrs.
			16		2.093,00 \$		3.240,00 \$	
!! McCarthy & Co - Website development	Jose Miller	Development	10	500,00 \$	720,00 \$	-220,00 \$	2.520,00 \$	3 / 3
Craig Rogers - Consulting	Jose Miller	Consulting	6	3.500,00 \$	326,50 \$	673,50 \$	720,00 \$	0 / 2
			16	4.000,00 \$	2.093,00 \$	483,50 \$	3.240,00 \$	

Data Quality

Choose the Data Quality report to check which appointments and tasks missing important information. The report shows activities without category and without linked objective.

- (1) Select Data Quality
- (2) Back & forward
- (3) Select timeframe
- (4) Print current view
- (5) Filter by Daylite user
- (6) All activities without Daylite category
- (7) All activities without linked objective

Click an appointment or task to open the particular activity in the main Daylite window.

Home

Calendar

Contacts

Objectives

- My Active Projects
- My Active Opportu...
- All Projects
- All Opportunities

My objectives

- Suspendet
- Finished next 7 days
- Open Projects
- open chances
- Lost chances

Tasks

Notes & Email

Forms

Groups

- All Groups
- Reports

Time&Budget

Time&Budget

2

1

3

4

3

7

5

Data Quality

Timeframe: Year2015Today

Search

Data Quality Report

Timeframe: 01.01.2015 - 31.12.2015

created on 08.05.2015

User Filter

☒ Alle users☒ Jose Miller

Expenses without cost

Export...

Name	Owner	Objectives	Date
Untitled Note	Jose Miller	T Lois Frank Auditor - Consulting	08.05.15
Invoice	Jose Miller		07.05.15

Activities without Category

Export...

Name	Owner	Objectives	Date	Time	Cost
				2:00	80,00 \$
✓ Paul Johannes - Consulting: Settle Appointment	Jose Miller	T Craig Rogers - Consulting	08.05.15		
⌚ Untitled Appointment	Jose Miller		07.05.15	1:00	40,00 \$
⌚ Untitled Appointment	Jose Miller		07.05.15	1:00	40,00 \$
				2:00	80,00 \$

Activities without linked Objective

Export...

Category	Activity	Owner	Date	Time	Cost
Expense	Invoice	Jose Miller	07.05.15	25:20	1.013,33 \$
⌚ Consulting	H&P Final discussion	Jose Miller	04.05.15	1:00	40,00 \$

Time&Budget 2 for Daylite

Page 52

Groups

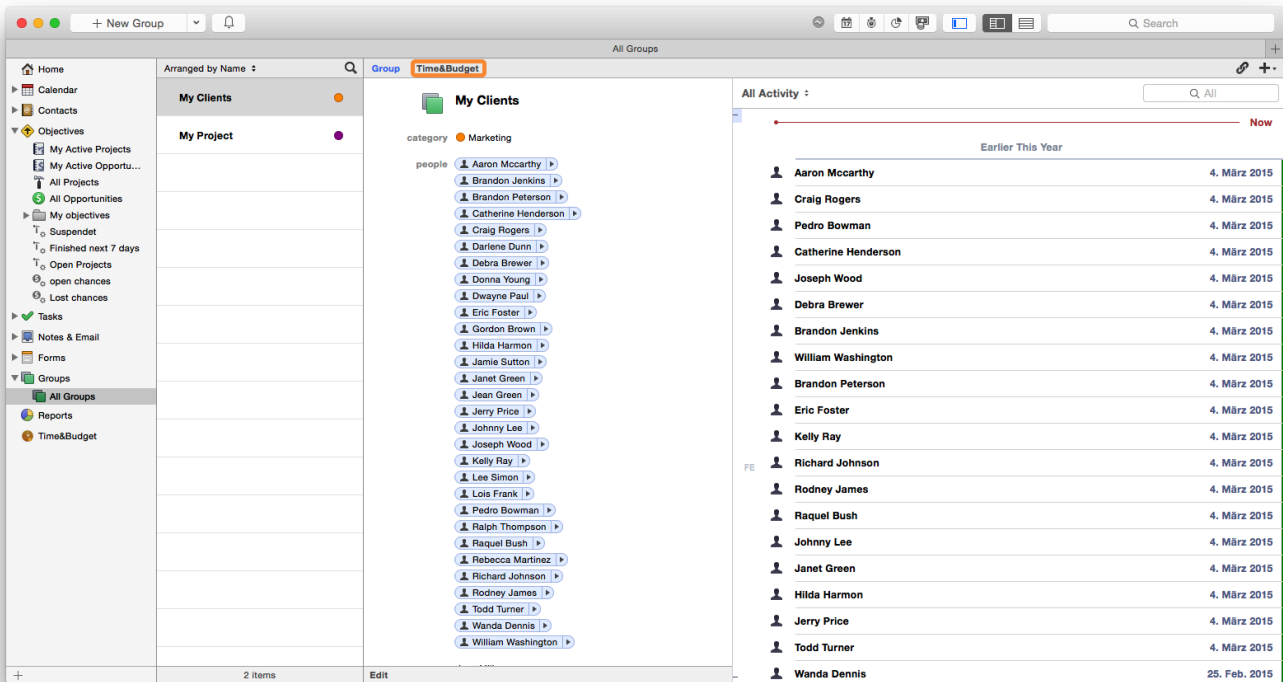
Reports on Groups

Opposed to the Time&Budget tab available in projects, opportunities, people and companies, the Time&Budget tab available in groups enables you analyze a freely definable collection of objects. Four different types of groups are being supported: groups of projects, groups of opportunities, groups of people and groups of companies. There is an individual report available for every particular type of group.

If you would like to run a report on a selection of clients for example, please do the following:

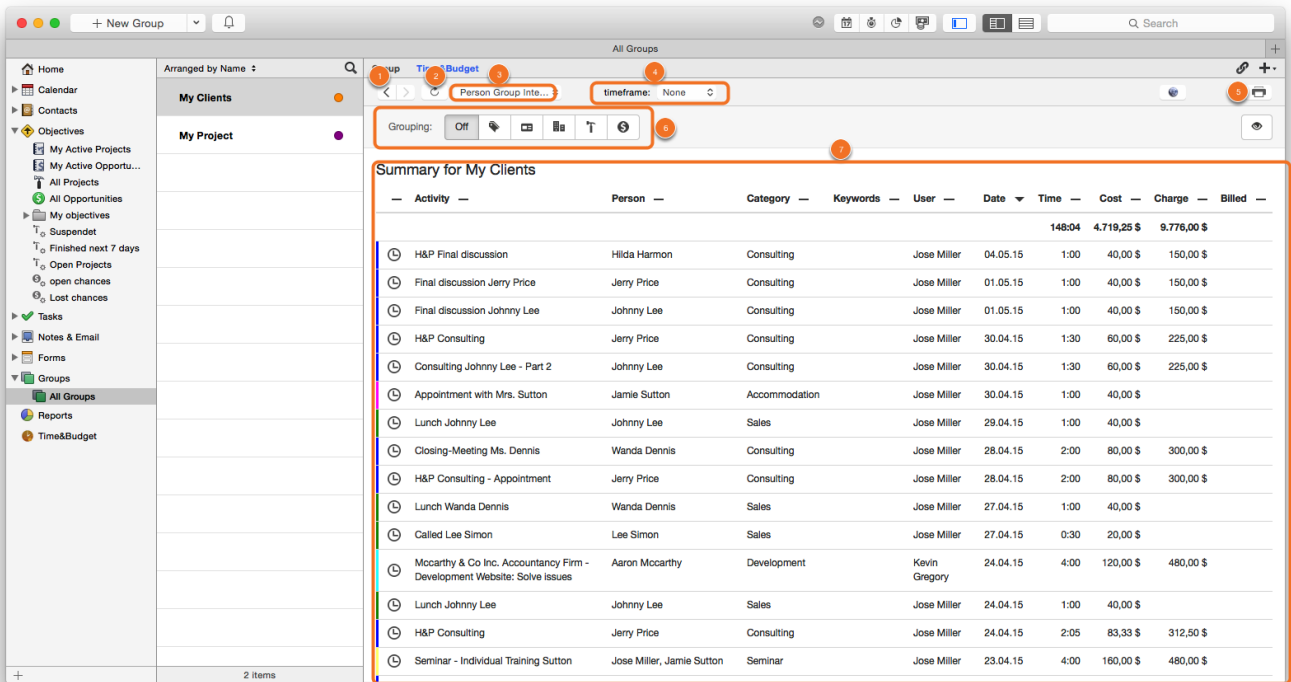
1. Create an new group in Daylite
2. Add the desired clients to the newly created group
3. Select the Time&Budget tab
4. Select the **Person Group Internal** report (Next time you click the Time&Budget tab within this group, this report will be preselected)

1. Select a Daylite group and click the **Time&Budget** tab



Group Overview

- (1) Back & forward
- (2) Refresh
- (3) Group reports drop-down menu (Person, Opportunity, Company and Project)
- (4) Timeframe of the report
- (5) Print current view
- (6) Group shown objects
- (7) Group activities

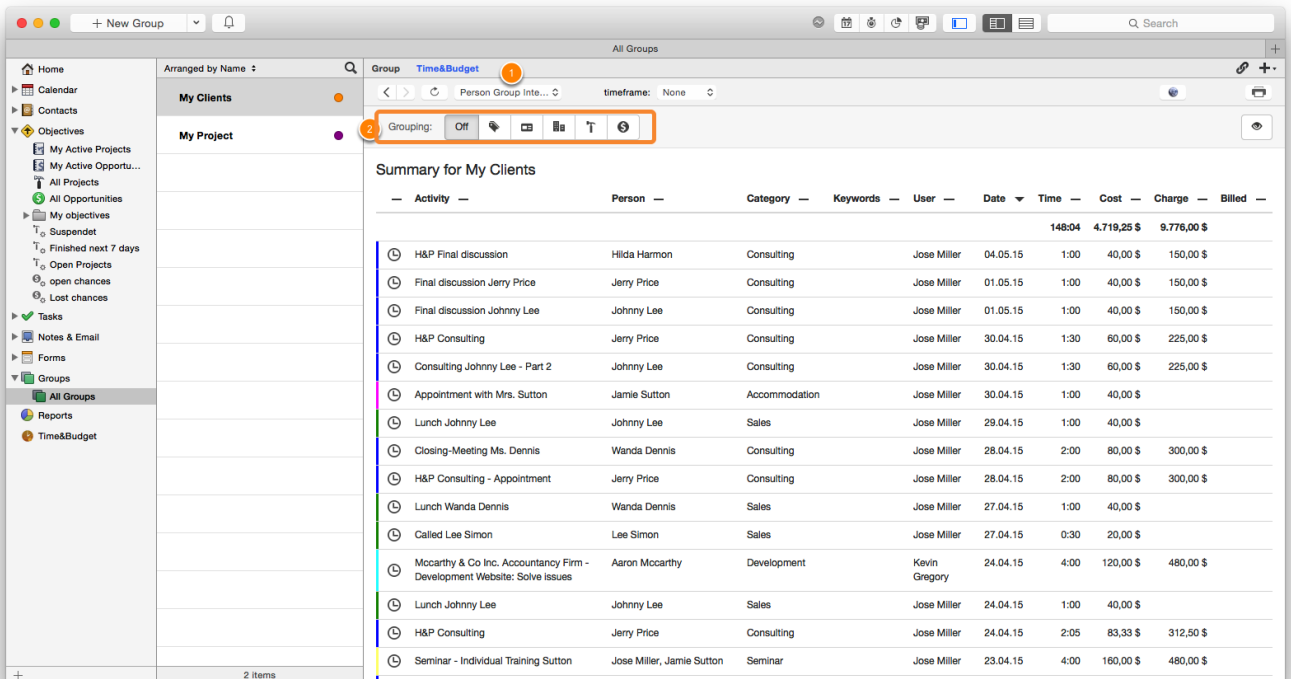


Analyzing a Group

Our example shows four projects that have been added to a group to analyze them.

The report Project Group Internal (1) has been selected

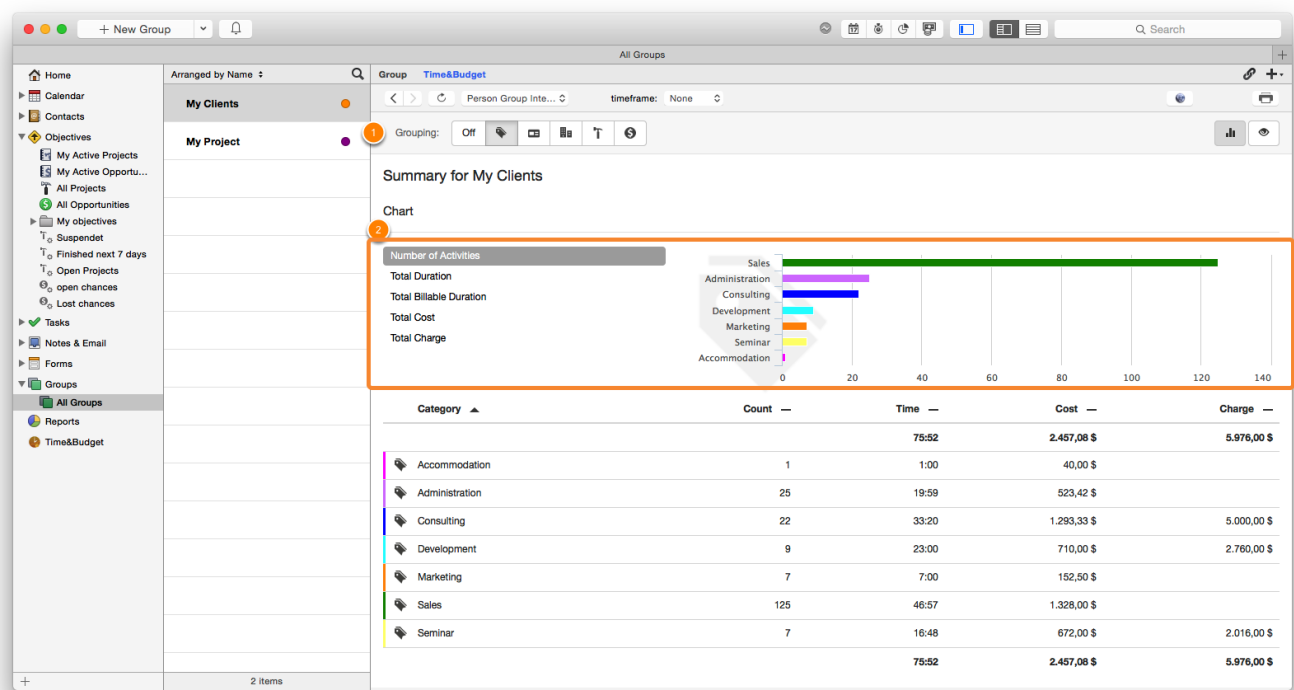
(2) Grouping of shown category



After grouping by category the report shows an overview of activities within the particular category

(1) Filtered by category

(2) Changes the diagram



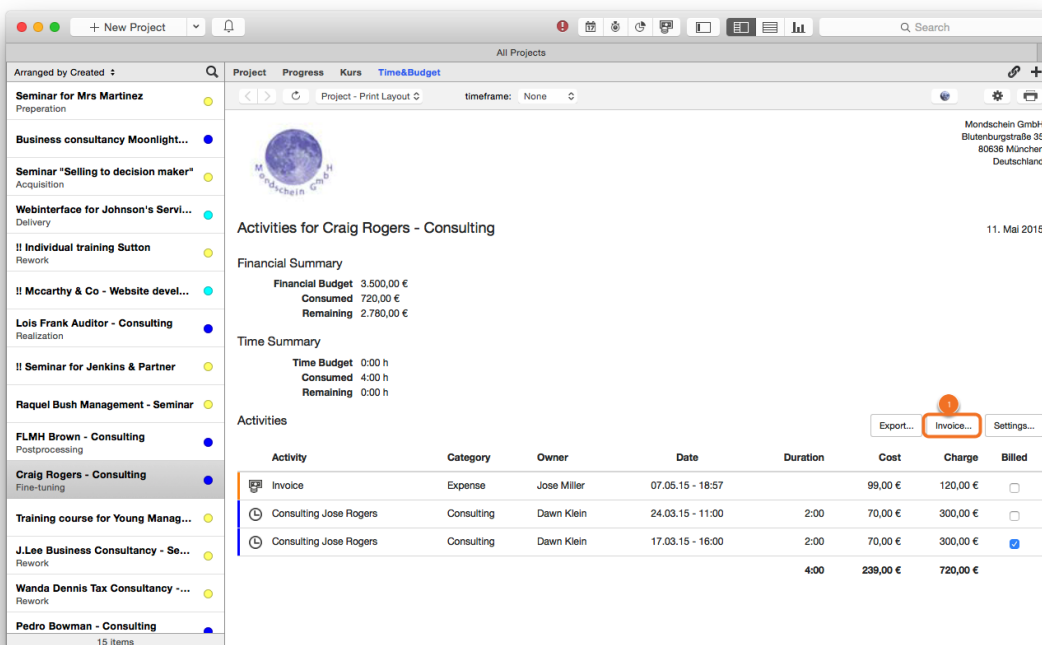
Data transfer and export

Data Transfer to Invoicing Software

Time&Budget provides the unique feature to transfer registered times and costs to certain invoicing systems. This enables you to use the times registered with Time&Budget to invoice your clients. A list of supported invoicing systems is available [here](#).

Setup

Time&Budget detects automatically if on of our invoicing connectors for Daylite have already been installed. In this case external reports will show an additional button (e.g. in projects) **(1)** Invoice....



Transfer Registered Times

There are different options and settings regarding the transfer to the invoicing system:

- (1) Select which of the companies linked with the project you would like to transfer to the invoicing software.
- (2) Define whether the prices include taxes
- (3) List Select which registered activities you would like to transfer

(4) Select which registered activities you would like to transfer

Please note: If you are using TotalsConnector, you can determine a subject and whether or not you would like to also transfer the activities' details to the invoicing software.

Send Time&Budget Activities to Totals

1 Document Type Invoice Recipient Craig Rogers

Header

2

3

Activities ☐ Include Details ☐ Prices include Tax

Send	Line	Date	Quantity	Unit	Cost	Price
<input checked="" type="checkbox"/>	Invoice	07.05.15	1	pc	120,00 €	120,00 €
<input type="checkbox"/>	Consulting Jose Rogers	24.03.15	2	h	35,00 €	150,00 €

4

Cancel Send to Totals

Overview Of Previously Transferred Activities

If you have already sent activities to an invoicing system, these particular activities will show a check in the column **Billed**.

Export

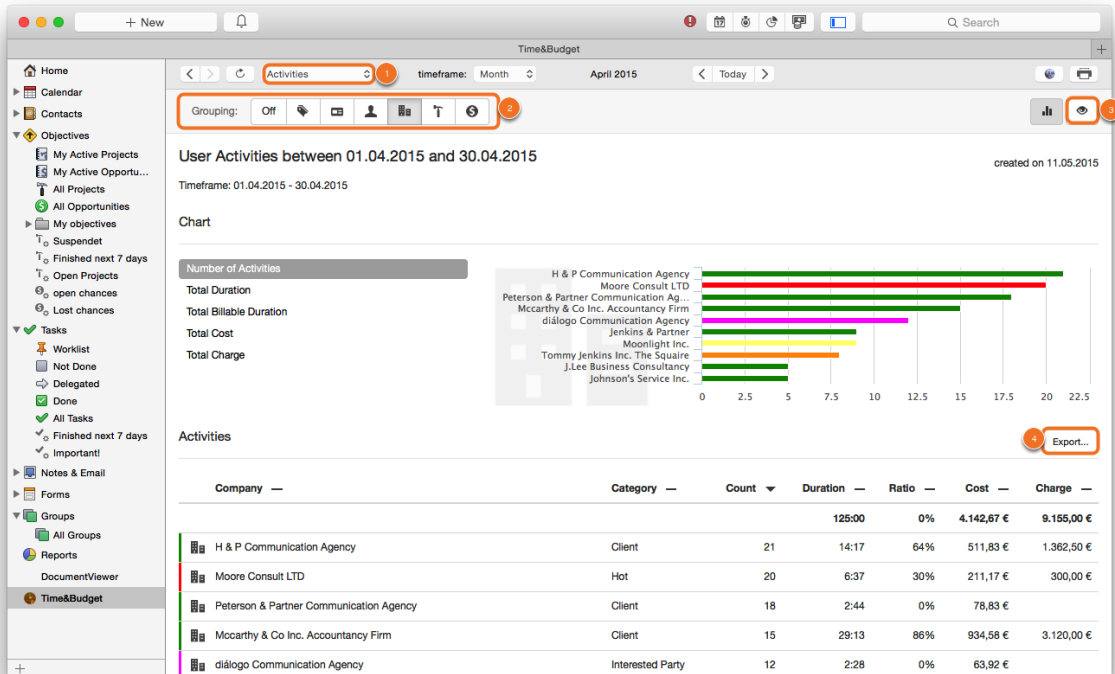
You would like to process your Time&Budget data in an external system but we have not developed an appropriate connector yet?

Time&Budget provides the ability to export reports to Excel or as a CSV (comma separated value) file.

Select Data to be Exported

In order to export data, please follow these steps:

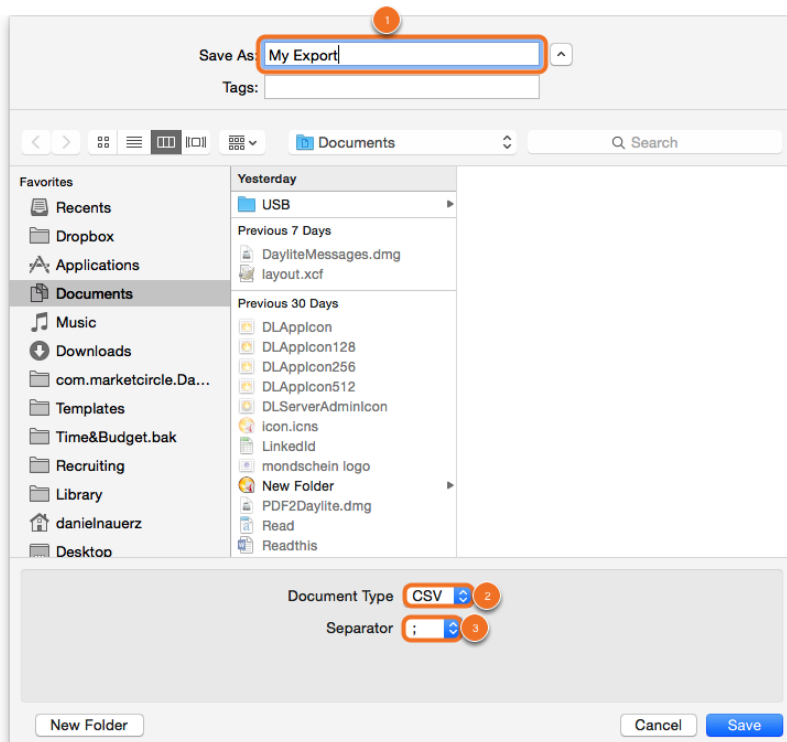
- (1) Open the report you would like to export
- (2) Group or filter data if needed
- (3) Hide columns you don't want to export if needed
- (4) Click Export... to export the data



Definition der Export-Parameter

The export dialog provides the following options:

- (1) Determine file name and location
- (2) Select file format (Excel or CSV)
- (3) Determine desired separator if CSV format has been selected



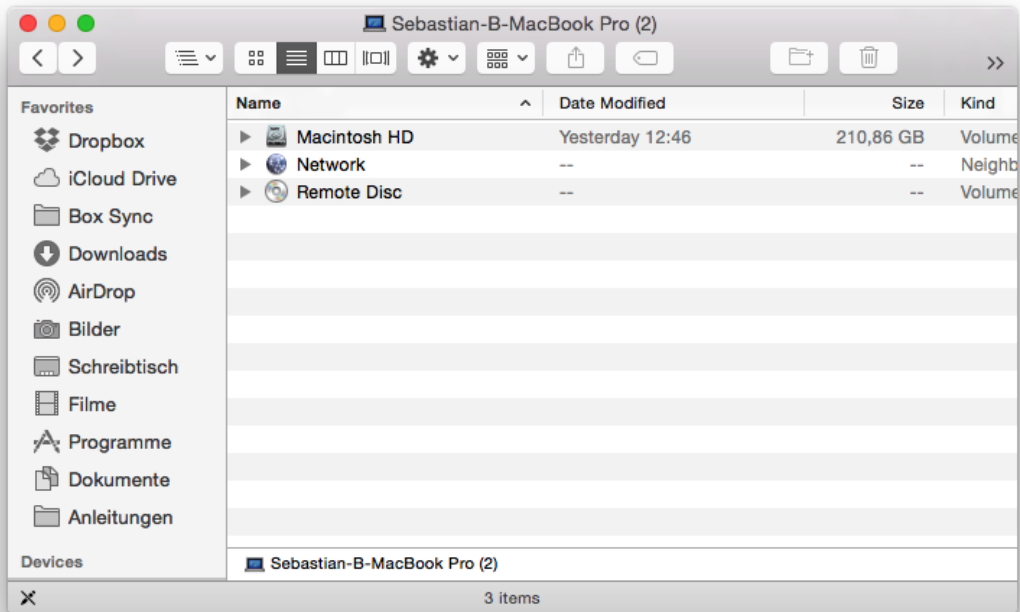
Miscellaneous

Time&Budget 1 Manual

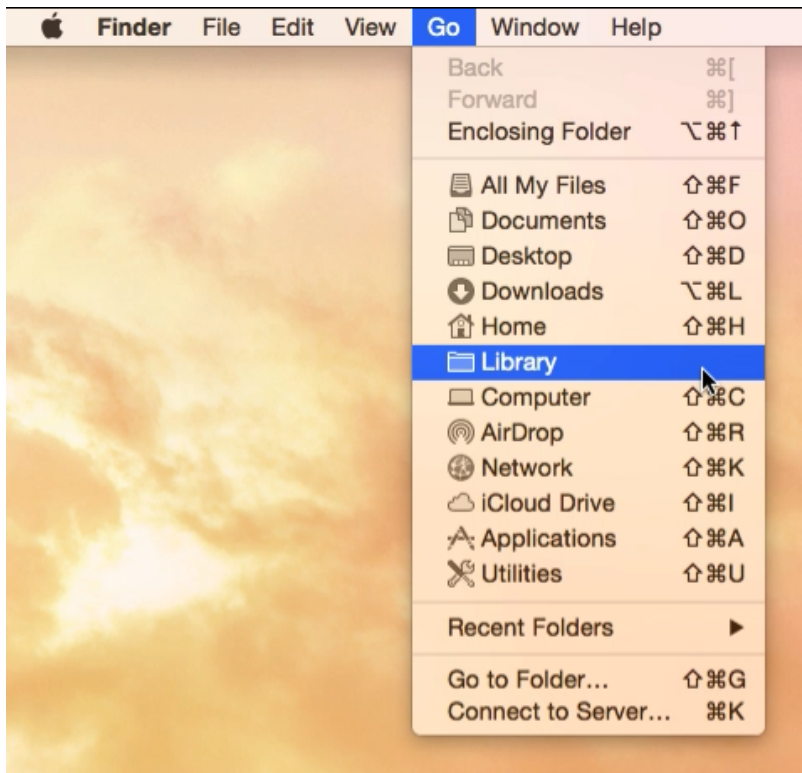
How to uninstall a plugin

In order to uninstall a plugin, please do the following steps:

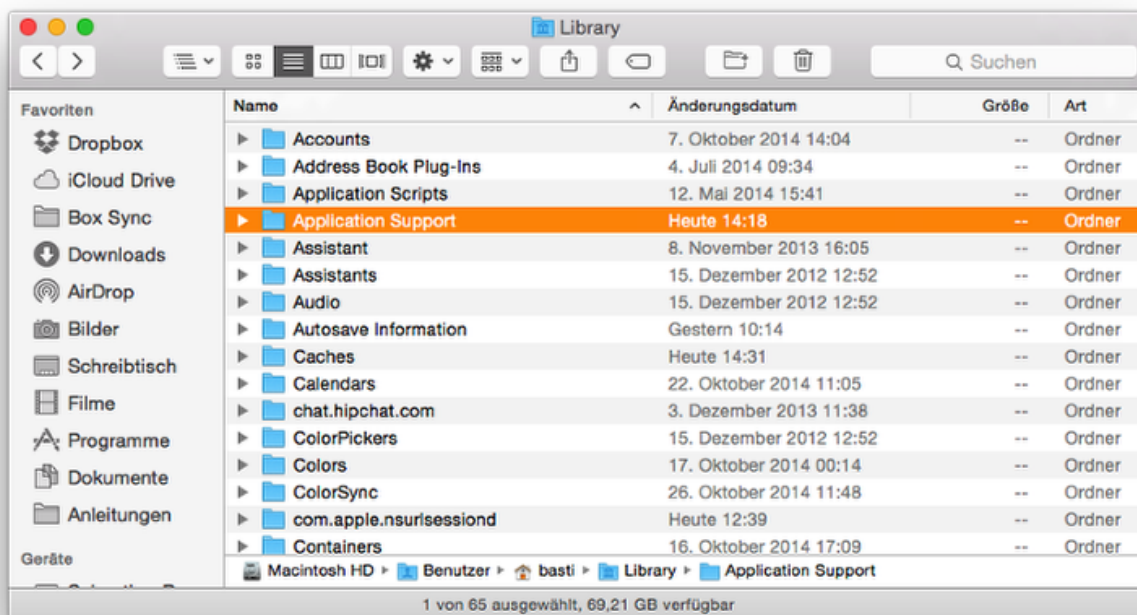
1. Open a Finder window



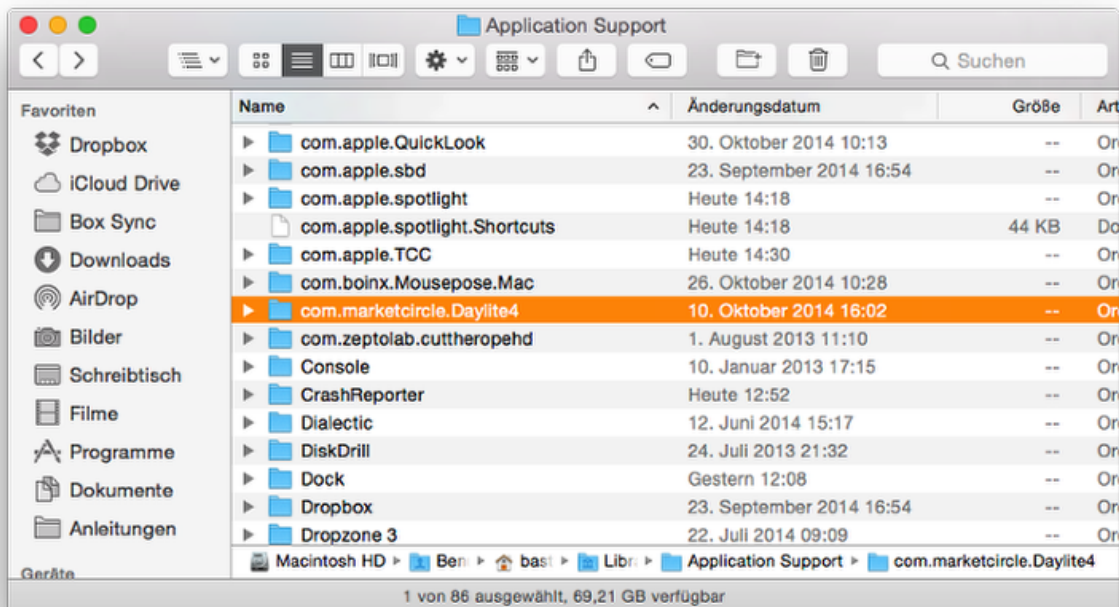
2. Click Go in the Finder menu, hold down the `⌘` [alt] key and select Library



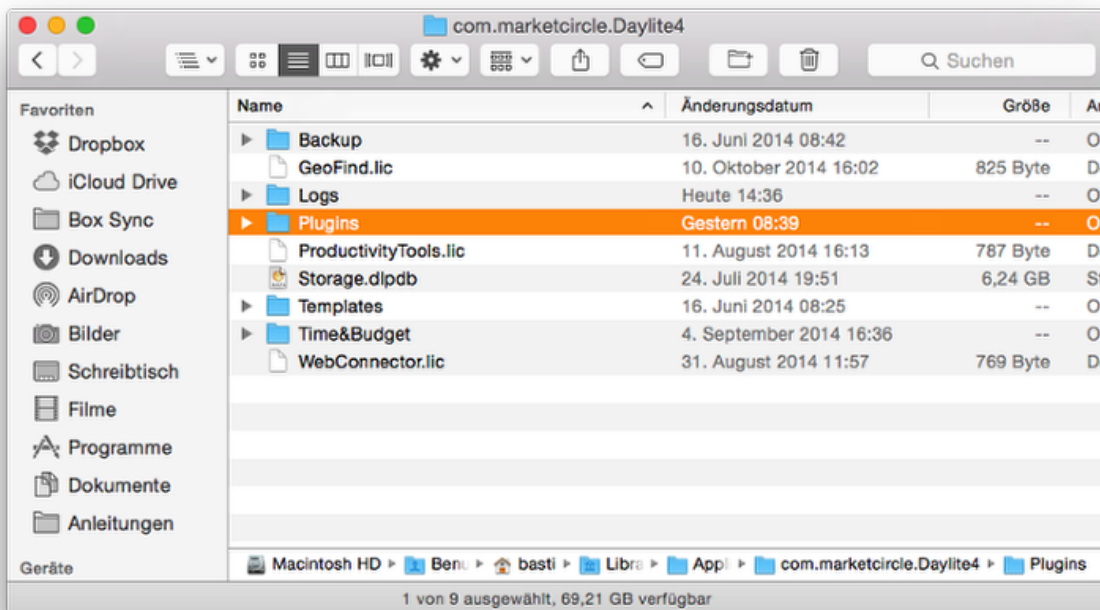
3. Navigate to Application Support



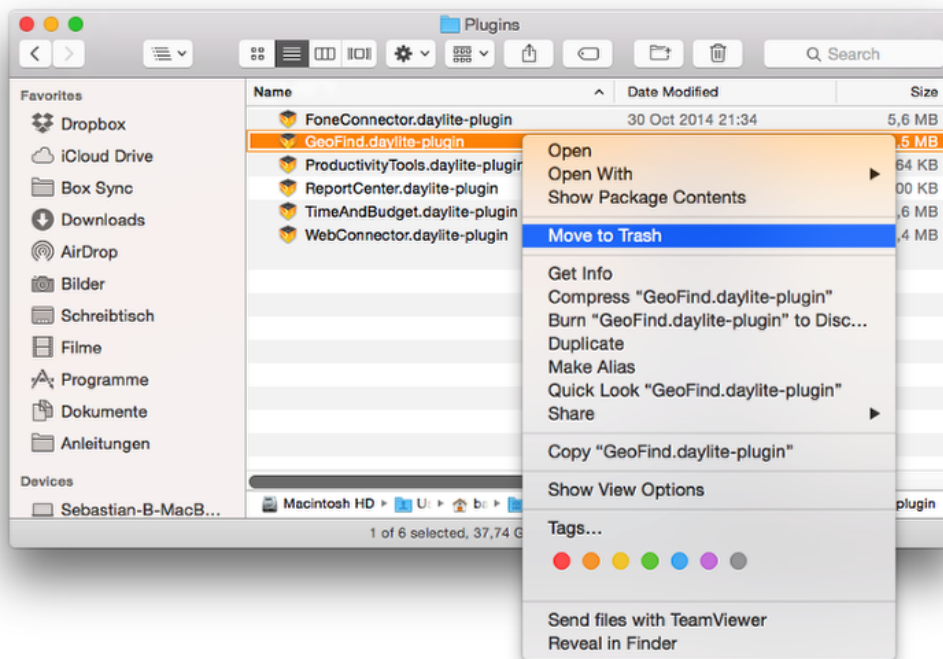
4. Navigate to com.marketcircle.Daylite4



5. Navigate to Plugins



6. Delete the appropriate plugin



7. Restart Daylite