

10 Time Saving Tips

You've now been using the software for a while but may have forgotten about some of the big (and little) time saving features you learned during your training. So we've compiled a "reminder" list of those time saving tips and features useful to time entry users and for those managing projects.

For time entry users

1 Favorites

Use the Timesheet's Favorites tab to keep a personalized collection of task assignments that can be quickly (or automatically) added to the weekly timesheet grid. This is useful for those individuals who use many of the same task assignments week after week after week....

2 An alternate use for Favorites

If you don't necessarily want to pre-populate your weekly timesheet grid, you can use Favorites to keep a smaller set of all the tasks in the assignment tree and then add items individually as required. This is useful when your assignments tree is full of tasks you rarely need.

3 Timesheet - Right click

Right click functionality is available in the time entry view's assignment tree and timesheet grid areas of the screen giving users quick access to many toolbar functions and features.

4 A faster way to Stop and Start timing

While timing on a task, you can automatically stop the current timer and start timing on a new task by simply selecting the new task and clicking the Start button.

5 Tabbing around

Within the weekly timesheet grid, you can use the Tab or Enter keys to navigate from one grid cell to another without using your mouse.

For those managing projects

6 Project templates

The primary benefit of establishing a project template is to have a common starting point when creating a new project. (...)

(...) When creating a new project, simply make a copy of the project template, rename it and make any necessary adjustments to assignments, budgets, etc.

7 Easier access to frequently used reports

You can keep your frequently used reports in a common Reports Explorer folder and save time having to search through the folders to find your everyday reports. Search for "Reporting Tips" in the help files.

8 Copy Employee Assignments

The Copy Employee's Assignments function is a powerful utility permitting all assignments for a given employee to be copied onto one or more other employees. The feature is particularly useful when assignments are based on teams and a new employee joins the team. It is also useful when assignments are primarily based on job descriptions and a new employee joins the company.

9 Preview reports

You don't need to run a report to see what type of information or what level of detail is displayed. A sample screen shot of every built-in report is available from the help files. Search for "preview reports" in the Help system's Index tab.

10 Assignments & Reports Explorer - Right Click

Right click functionality is available in the Project Assignments and Reports Explorer views giving the user quick access to toolbar functions and features.

+ BONUS: Project Workspace Filter

The Project Assignments view's Assignments filter allows users to reduce the amount of information displayed in the assignments pane.