

BLUE CHAMELEON : Projects/Timesheets

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7.10 Projects/Timesheets

Projects aim at representing, for a client, a series of works, tasks, etc. made by your company.

This work can be accounted for and represented at the same time as timesheets, which might even give the possibility to be invoiced.

The Blue Chameleon add-on that allows these acts to be performed, on a daily basis, is accessible via **Add-ons** / **Projects/Timesheets**.



Project/Timesheet access user rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element

[Menu script user rights :] Projects/Timesheets

7.10.1 Rights related to Projects/Timesheets

They are ruled at the *Modify User Page* (9.17) for instance as illustrated on Fig.7.84.

The screenshot shows the 'Modify' page for user 'Tom'. The breadcrumb trail is 'General / Users / Users / Tom Modify'. The main content area is titled 'Menu script user rights:' and has two columns: '[Owner]' and '[All]'. Under the 'Projects/Timesheets' section, there are several rows of settings:

Menu script user rights:	[Owner]	[All]
Projects	Create/Modify	Create/Modify
Timesheets	Delete/Create/Modify	Delete/Create/Modify
Is featured in user menus	Yes	
Print/export management	Print/export	Print/export
Bill management	Administration	Administration

At the bottom left, there is a 'Modify' button with a speech bubble icon.

Figure 7.84: The user rights that rule Projects and Timesheets, for a 'manager' user.

For this user :

[Menu script user rights :]

- Projects/Timesheets : rules the access to the Projects/Timesheets add-on

The other rights as displayed further down under *[Projects/Timesheets]* rule the management of :

- Projects (7.10.3), for oneself and for all users (None, View, Create/Modify) ;
- Timesheets (7.10.8), for oneself and for all users (None, View, Modify, Delete/Create/Modify) ;
- whether user will be featured in 'User' menus (as featured on timesheet pages) : this menu must be set to 'Yes' for users who will be featured in timesheets, and 'No' for users who will never have timesheets created in their name. This is useful for making 'User' menus less long ;
- Printing and exporting timesheets (7.10.8.5), for oneself and for all users ;
- Invoicing timesheets : rights can be as low as None, then View, Modify (i.e. choose whether a Timesheet is billable or not (7.10.8.1, 7.10.8.2)), Invoice (create an invoice related to a timesheet, 7.10.9) and Administration, ruling which service articles can be defined for which user (7.10.7). This right, as usual, applies for oneself and for all users.

When Administration is chosen for 'Bill Management', user can also access the *Administration Page* (7.10.7).

7.10.2 *Projects/Timesheets main page*

With rights configured as in Fig.7.84, the *Projects/Timesheets main page* shows what is featured at Fig.7.85.

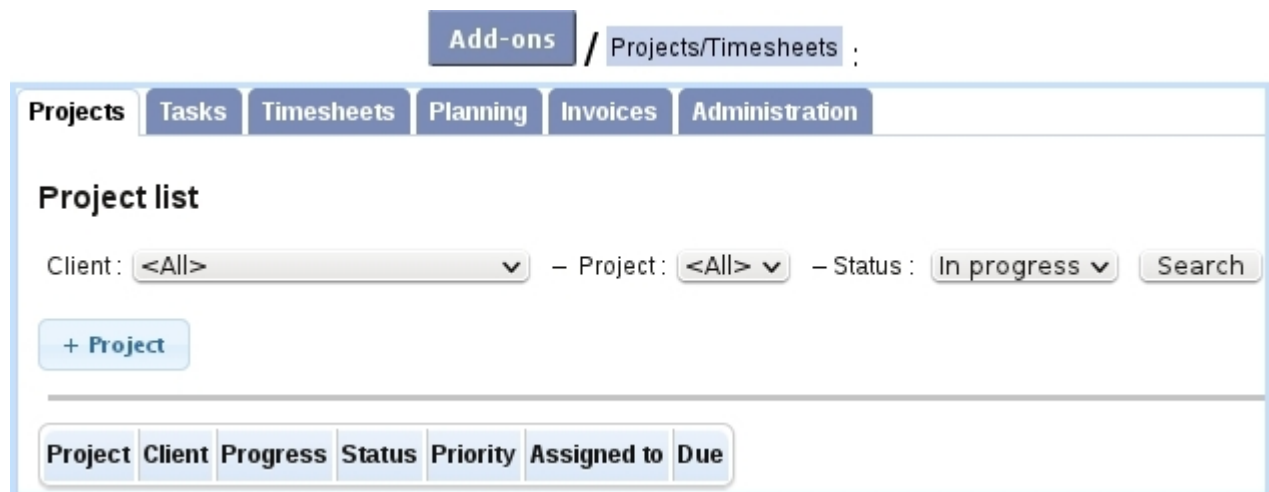


Figure 7.85: The *Projects and Timesheets Main Page*.

Tabs (provided rights are sufficient) on the top can be clicked to access the different parts of the Projects/Timesheets add-on :


- Projects (7.10.3), Tasks (7.10.4) and Planning (7.10.6) tabs, appearing if 'Projects' rights are at least 'View' ;
- Timesheets (7.10.8) tab, appearing if 'Timesheets' rights are at least 'View' ;

- Invoices (7.10.9) tab , appearing if 'Bill management' rights are at least 'View' ;
- Administration (7.10.7) tab , appearing if 'Bill management' rights are 'Administration'.

7.10.3 Projects

Main Projects Page is accessed via the Project tab ; from here, projects can be searched and created.

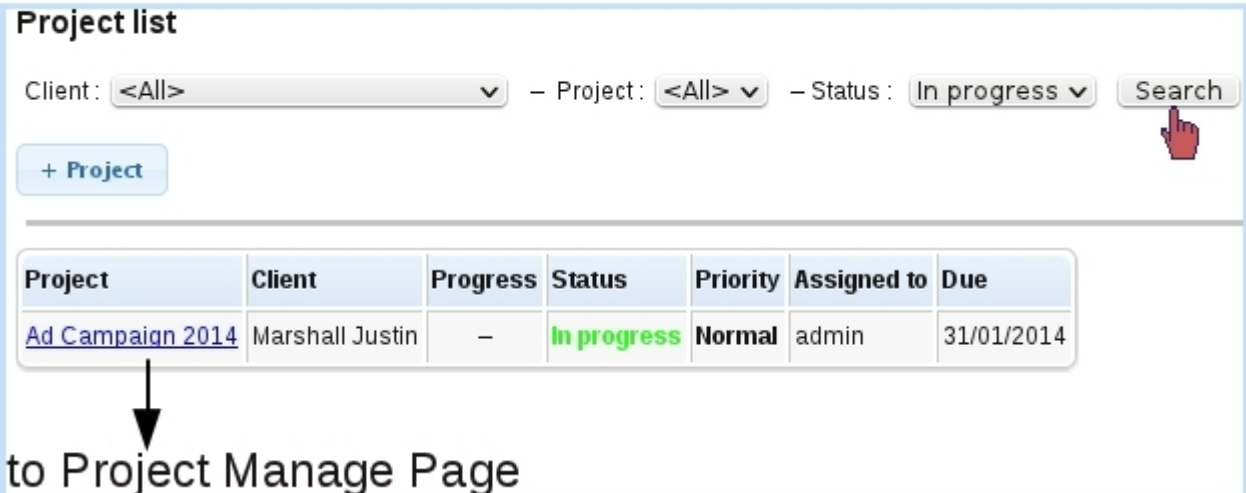
7.10.3.1 Creating a project

Creating a project is done by clicking the  button, where choice is then given between 'Client project' and 'Internal project' (attached to no client). Fig.7.86 shows how a client project is created. There, user can define :

- a label, short label and comments ;
- a starting status ('In progress' or 'Pending') ;
- a priority ('Low', 'Normal', 'High' or 'Critical') ;
- a due date ;
- the enabling of a maximum number of logged hours and amount, when project's related timesheets will be created and invoiced ;
- rights for each user group, 'None' for no access at all to this project ; 'View' only or 'Modify'.

Upon creation, one is redirected to the *Manage Project Page*, that can also be access on the *Main Projects Page* by clicking project's name :

[Projects Tab] :



The screenshot shows a web interface for managing projects. At the top, there is a 'Project list' header. Below it, there are search filters: 'Client: <All>', 'Project: <All>', and 'Status: In progress'. A 'Search' button is located to the right of these filters. Below the filters is a '+ Project' button. The main part of the interface is a table with the following columns: Project, Client, Progress, Status, Priority, Assigned to, and Due. The table contains one row with the following data: Project: [Ad Campaign 2014](#), Client: Marshall Justin, Progress: -, Status: In progress, Priority: Normal, Assigned to: admin, Due: 31/01/2014. An arrow points from the project name 'Ad Campaign 2014' to the text 'to Project Manage Page' below the table.

Project	Client	Progress	Status	Priority	Assigned to	Due
Ad Campaign 2014	Marshall Justin	-	In progress	Normal	admin	31/01/2014

to Project Manage Page

[Projects Tab] / [+ Project](#) Client project / [Client Search] :

New project
For : [istn.mrsh73](#)
Label :
Short label :
Comment :
Status : ▾
Priority : ▾
Due date : 31/01/2014
Enable max amount/number of hours :
Enable preferred services :

Rights :
Accounting : None View Modify
Administrator : None View Modify
Customer Support Group : None View Modify
External Relations : None View Modify
Sales Department : None View Modify

Figure 7.86: Adding a new project for a client.

7.10.3.2 Managing a project

Whenever a project click-link is featured, it leads to the *Manage Project Page*, as shown on Fig.7.87.

There, it is possible to :

- modify this project's main data (7.10.3.3) ;
- access its timesheets (7.10.8) ;
- access its invoices (7.10.9) ;

Ad Campaign 2014 :

Ad Campaign 2014 [jstn.mrsh73] ← Project list

Status : **In progress** – Priority : **Normal** – Planned amount : 0.00 – Planned hours : 0 – Assigned to : admin – Owner : admin – Due : 31/01/2014

Modify
Timesheets
Invoices
Print overview

Tasks +

No task

Actions + (System actions)

06/12/2013 09:39 admin	Label :	Ad Campaign 2014
	Status :	In progress
	Priority :	Normal
	Due date :	31/01/2014
	Assigned to :	admin
	Owner :	admin

06/12/2013 09:39 **Created**
admin **All designs for 2014 advertisement campaign.**

Figure 7.87: This page allows to manage and access all data related to a project.

- print a general overview of the project, in the same layout as a full-featured (all timesheets, all users) PDF print (7.10.8.5), with further invoice-related information ;
- view and add tasks to the project (7.10.4) ;
- view and add actions to the project (7.10.3.4).

7.10.3.3 Modifying a project

As featured on Fig.7.88 the following properties of a project can be updated :

- label, short label, status and priority ;
- amount and hours planned, provided project had been created with the enabling thereof (7.10.3.1) ;
- owning user and user it is assigned to (so as to appear on user's Event Control, 7.10.5) ;
- rights, in a similar manner as for creation ;
- project's allowed services (7.10.3.5).

Any validated update is then logged as an system 'action'. User actions can be created anytime, as described next.

[Manage Project Page] Modify :

Label: <input type="text" value="Ad Campaign 2014"/>	Rights ↓ Services ↓
Short I.: <input type="text" value="AdCpgn14"/>	
Status: In progress ▼ Priority: Normal ▼	
Amount planned: <input type="text" value="20000"/> Hours planned: <input type="text" value="38"/>	
Due: <input type="text" value="31/01/2014"/> 1 2	
Assign to: admin ▼ Owner: admin ▼	
Validate Cancel	

Figure 7.88: Updating a project.

7.10.3.4 Project actions

Whenever something new is done on the project, or just for information purposes, one can add a project action as shown at Fig.7.89.

[Manage Project Page] :

... **Actions** + (System actions)

Add action:

Prelim docs have been sent.

+ Add file...

Add Cancel

Figure 7.89: Adding an action for a project.

Also, to each action, it is possible to add a file, accessible at any point of the project's history.

7.10.3.5 Allowed services for a project

The Services ↓ button as found on the Modify Project interface (Fig.7.88) serves as to define which services (which are in fact shop articles that are counted in a hourly way)

are proposed adding a timesheet for that project.

Fig.7.90 shows how articles can be added.

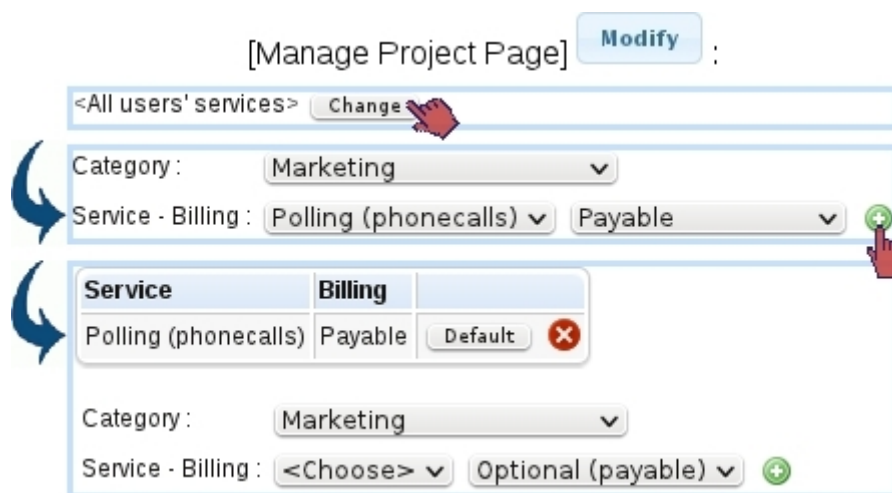


Figure 7.90: Adding a service article to be used for this project's timesheet.

As shown there, when no services are defined, user's own defined services (7.10.7) will be proposed. By clicking the **Change** button, shop articles used as 'services' can be added. Here, the article 'Polling (phonecalls)' (which price has been defined for an hour) will be proposed when adding a service timesheet (7.10.8.2), its billing forced to 'Yes' ; there, this service can be automatically selected by making it **Default**

The different billing options are :

- Free, meaning that service timesheets cannot be declared as billable ;
- Optional (free), meaning that service timesheets can be declared as billable or non-billable, with the latter chosen by default ;
- Optional (payable), meaning that service timesheets can be declared as billable or non-billable, with the former chosen by default ;
- Payable : meaning that service timesheets are no other way than billable.



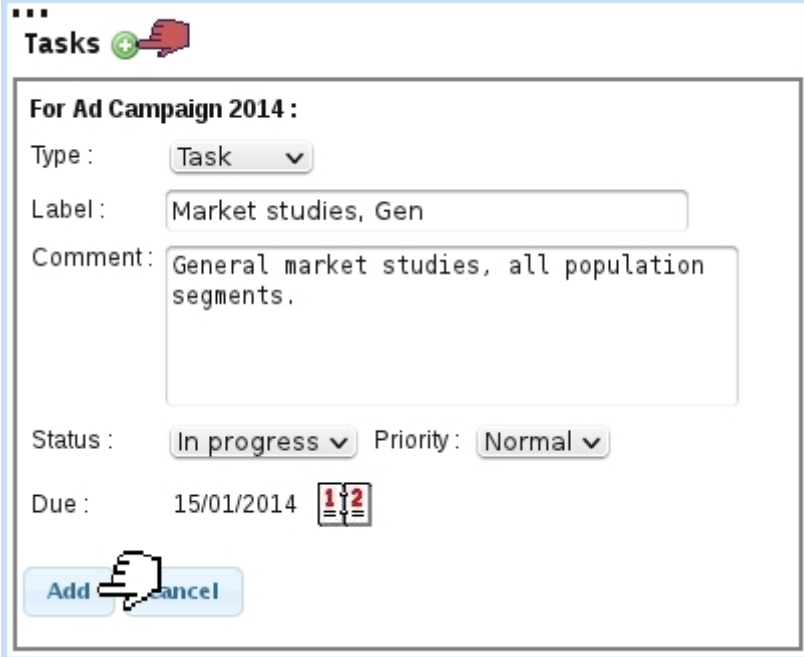
The existence of such allowed services for a project override any service defined for a user (7.10.7). If a project has one or several defined services, only those will be proposed when adding a service timesheet.


7.10.4 Project's tasks

A task for a project can be created from the *Manage Project Page*, or from the *Manage Tasks Page* (7.10.4.1).

Fig.7.91 shows how a task is added from a project.

[Manage Project Page] :



Tasks 

For Ad Campaign 2014 :

Type :

Label :

Comment :

Status : Priority :


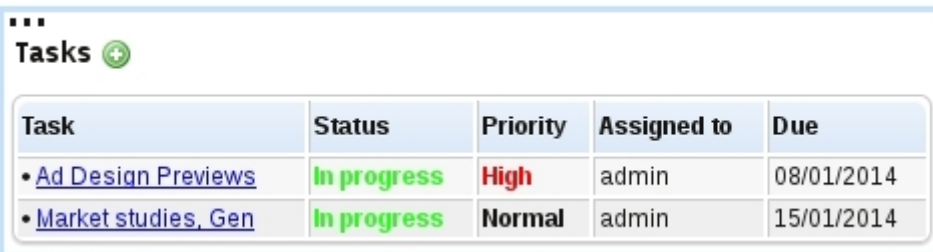
Due : 15/01/2014 

Figure 7.91: Adding a task for a project.

Tasks, on the Project's page, are featured in a table, each being a click-link to its *Manage Task Page* (7.10.4.1) :

[Manage Project Page] :



Task	Status	Priority	Assigned to	Due
• Ad Design Previews	In progress	High	admin	08/01/2014
• Market studies, Gen	In progress	Normal	admin	15/01/2014

7.10.4.1 Managing tasks

Clicking on the name of a task, wherever it appears, activates the Tasks tab to show the task's information, which can be updated (7.92).

Market Studies, Gen :

Market studies, Gen Ad Campaign 2014 ← Task list

Status : **In progress** – Priority : **Normal** – Assigned to : admin – Owner : admin – Due : 15/01/2014

Modify

Label :

Status : Priority :

Due : 15/01/2014

Assign to : Owner :

Actions (System actions)

07/01/2014 17:10 **First draft of results.**
 admin
 File : [results](#)

Figure 7.92: From here, a task can be managed.

Similarly as for a project, actions are logged and can be added, optionally with an attached file.

On this page, right to the task name, a click-link allows to show the task's related project, shown in the then-activated Projects tabs.

The button allows to show the *Task List Page* as explained next.

7.10.4.2 List of tasks

Accessed from an individual task or from the Tasks tabs when accessing the Projects/Timesheets add-on, the *Task List Page* (7.93) allows to look for tasks according to the following search criteria :

- user who owns tasks or to whom tasks have been assigned ;
- a range of dates for the due date ;
- a particular status.

7.10.5 Project event control

In order to remind user of the tasks that are due, s/he can activate the "Projects/Timesheets" event control (1.3), which can show the following :

[Manage Task Page] [← Task list](#) :

or [Add-ons](#) / [Projects/Timesheets](#) / [Tasks](#) :

Task list

User : – From 01/01/2014 to <none>

Status : – Sort by : –

Task	Project	Status	Priority	Assigned to	Due
Ad Design Previews	Ad Campaign 2014	In progress	High	admin	08/01/2014
Market studies, Gen	Ad Campaign 2014	In progress	Normal	admin	15/01/2014

Figure 7.93: An interface to look for tasks.

[Home](#) :

Projects ...
– □ ↗ ✕

Tasks in progress	Project	Due
Ad Design Previews	Ad Campaign 2014	08/01/2014
Market studies, Gen	Ad Campaign 2014	15/01/2014

7.10.6 Project planning

As accessed via the [Planning](#) tab, in order to better allocate users' time, Projects and users to process them can be planned in advance in a weekly view as featured in Fig.7.94. There, for each project and day of the selected week, the view shows which users are to work on which project.

In order to define a day's schedule for a project, one must click on the corresponding cell and add users (on that menu are only shown users having access to Projects/Timesheets and having been configured as 'will be featured in User menus', 7.10.1) :

Planning

View: **Project** **User** - Projects **Active** - Week: 06/01/2014 - 12/01/2014 **Display**

Project	Mon 6/1	Tue 7/1	Wed 8/1	Thu 9/1	Fri 10/1	Sat 11/1	Sun 12/1
Ad Campaign 2014		Dick Harry Tom					

Figure 7.94: An example of project planning.

There, users are added with and removed with . Also, before validating, it is possible to duplicate the cell's planning for the next few days to come.

Afterward, a cell's planning can be modified in a similar way.

The 'View : Project/User' toggle on top of the page serves as to switch from this view to a view where *users* are listed vertically and, in each planning cell, *projects* (that are pending or in progress) will be featured ; the adding and deleting of projects for a day is done in the same way.

On the 'User:' menu there, it is to note that teams (7.10.7.1), if they have been defined, are also proposed.

7.10.7 Projects/Timesheets administration

Provided user's 'Bill management' rights (7.10.1) are set to 'Administration', the eponymous tab appears and shows what is featured at Fig.7.95.

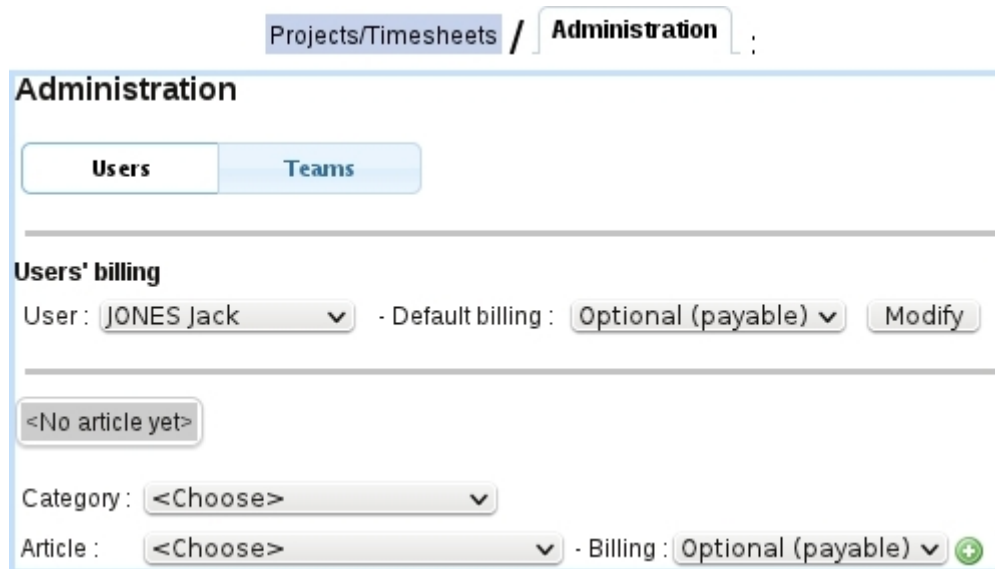


Figure 7.95: From here, users' billing preferences and services can be managed.

The first part defines the default billing when adding an service article is added in the interface just under it. This interface works similarly as in 7.10.3.5.

For instance, setting user Jack Jones has having the service article 'Airbrushing and enhancing' (as default) will mean that, **for projects without any service defined**, this service will be proposed when bringing up the add service interface.

7.10.7.1 Teams of users

The 'User:' menus as seen on the timesheets or project planning (7.10.6) environment may also propose teams ; those are groups of users and are defined in the Human Resource Management add-on (7.11.4.9).


7.10.8 Managing Timesheets

Timesheets have the following properties :

- they can be either of the 'Service' or 'Article' kind ; in the former, for the project, a user performs a certain service for a certain timelength ; in the latter, an article from the shop is used for the project's needs (and thus does not have any user attached to it) ;

- therefore, in addition to the client, the project and (optionally) the user, a timesheet has either a duration or a quantity ;
- a comment is added too, describing what has been done.

Before properly using timesheets, a few configuration steps have to be performed, by defining allowed services for the projects (7.10.3.5) and/or users' services (7.10.7). **'Service' articles are created in the Shop as any other article**, except that the unit price must correspond to an hourly price.

The *Timesheet Page*, featured at Fig.7.96 is accessed either by the eponymous tab or by clicking the  button on the *Manage Project Page* (7.10.3.2). By default the *Timesheet Page* shows a 'Monthly View'.

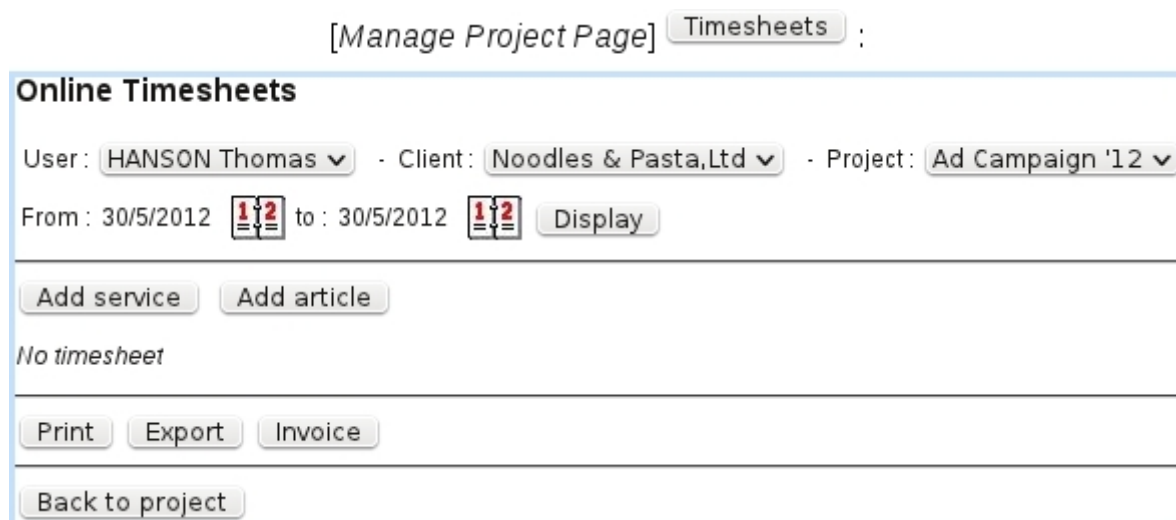


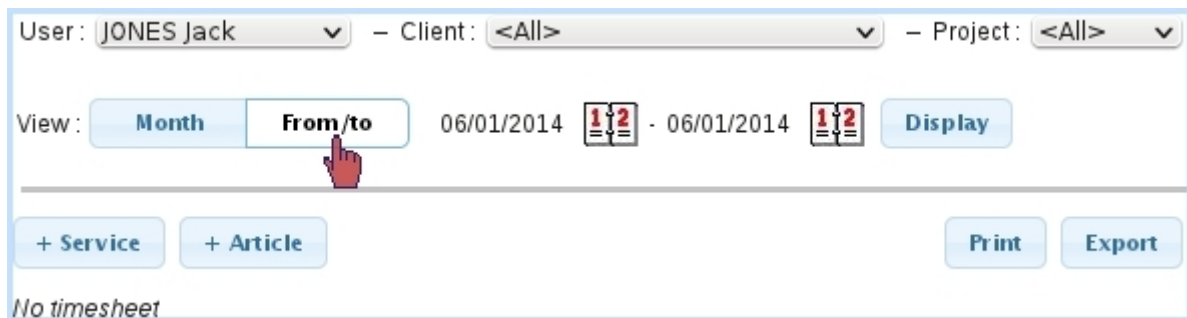
Figure 7.96: The *Timesheet Page*.

It features :

- a user menu, provided that user has at least 'View' rights for All's timesheets (7.10.1), otherwise it is just the name of the current user ; this user menu may also feature teams (7.10.7.1) ;
- client and project menus, that may be set to the originating project if coming from *Manage Project Page* ;
- a toggle between 'Month' and 'From/to' view ; the latter is where timesheets can be created (7.10.8.1) ;
- below those, according to the view choice a monthly or extended list of timesheets is shown, with buttons allowing to browse and others to print and export (7.10.8.5).

7.10.8.1 Creating timesheets

Adding timesheets is done by switching to the 'From/to' view, which then shows what the following :



The screenshot shows a user interface for creating timesheets. At the top, there are three dropdown menus: 'User: JONES Jack', 'Client: <All>', and 'Project: <All>'. Below these, there are two buttons: 'Month' and 'From/to', with a red hand cursor pointing to 'From/to'. To the right of these buttons are two date pickers, both set to '06/01/2014', and a 'Display' button. Below this section, there are four buttons: '+ Service', '+ Article', 'Print', and 'Export'. At the bottom left, the text 'No timesheet' is displayed.

Two buttons **+ Service** and **+ Article** allow to create such timesheets, as described next. For these buttons to appear, user must have sufficient Timesheet rights.

Right to those, buttons allow to **Print** and **Export** timesheets (7.10.8.5).

7.10.8.2 Creating a service timesheet

Fig.7.97 shows how a 'service' timesheet is added.

[Timesheet Page, From/To View] **+ Service** :



The screenshot shows a dialog box titled '[Timesheet Page, From/To View] + Service :'. It contains the following fields and controls:



- Client: Marshall Justin (dropdown)
- Project: Ad Campaign 2014 (dropdown)
- Date: 06/01/2014 (calendar icon) repeat: 7/1/2014 - 8/1/2014 - 9/1/2014 - 10/1/2014
- User: JONES Jack
- Service: Polling (phonecalls) (dropdown)
- Billable: Yes
- Duration: 6h30 (dropdown)
- Comment: Poll was made on the 18-35 age range. (text area)
- Buttons: Add (with hand cursor), Cancel

Figure 7.97: Creating a service timesheet.


There :



- client, project and user are preselected from above ;


- date, as set by default to the current date, can be modified by clicking on the calendar icon. Timesheet can also be repeated the few next days ;
- service : if allowed services had been defined for the project (7.10.3.5), those are the ones that are shown in this menu. If project has no defined allowed service, user's services (7.10.7) are shown ;
- the 'Billable:' field contains either 'Yes' or 'No' or a menu with those, according to the billing of the service article chosen above ;
- finally a duration in hours (with half-hour increments) is picked and a comment is filled.

Upon click on , the service timesheet is created, and another one can be done right after ; the panel is dismissed with . Service timesheets feature in the following order the client, the date, the user (with the service article), the project and comment, and the duration :

Client	Date	User	Project	Duration
Marshall Justin	06/01/2014	admin <i>Polling (phonecalls)</i>	Ad Campaign 2014: Poll was made on the 18-35 age range.	6h30
Total 06/01/2014				6h30

When switching back to the Monthly View, a summary for Service timesheets is provided on each day line ; further details can be then viewed by putting mouse cursor over the  icon :

View:   :

January 2014		Duration	Clients	
01	Wed	0h00		
02	Thu	0h00		
03	Fri	0h00		
04	Sat	0h00		
05	Sun	0h00		
	06	Mon	6h30	Marshall Justin [Ad Campaign 2014]

Marshall Justin Ad Campaign 2014

Jack Jones [Polling (phonecalls)] *Poll was made on the 18-35 age range.* (6:30)

Clicking on a day line in the Monthly View brings up the Range View with boundaries set to that day.



It is to note that if neither project (7.10.3.5) nor user (7.10.7) were configured service-wise, a service timesheet can still be added, the service article being 'None' and the 'Billable:' property set to 'No'.

7.10.8.2.1 Creating a service timesheet for a team By selecting a team (7.10.7.1) in the 'User:' menu, the 'User' field in the create service timesheet panel changes to a list featuring herself/himself and her/his teammates with checkboxes, pre-ticked according to whether user is selected by default in that team :

User/Team: Writers

View: M

+ Service

<All>

Users

HANSON Thomas

JONES Jack

MALONE Richard

ROBBS Harry

Teams

Writers

Client: Marshall Justin

Project: Ad Campaign 2014

Date: 07/01/2014 repeat: 8/1/2014 9/1/2014 10/1/2014 13/1/2014

Users: HANSON Thomas - MALONE Richard - ROBBS Harry



If project has no defined service : the available service article menu is ruled by the leader of the team and will be applied to each member of the team : the chosen article must then have been configured (7.10.7) before to each of them.

Validating the timesheet will then automatically create an individual timesheet for each of the checked team members.

7.10.8.3 Creating an article timesheet

Contrary to the 'service' timesheets as described before, the article timesheets are not attached to a particular user. They describe which articles of the Shop have been used to do a certain task. Therefore, there is no duration anymore, only a quantity.

Fig.7.98 features the creation of such a timesheet. Final result shows client, date, article, project, comment and quantity.

[Timesheet Page, From/To View] + Article :

Client: Marshall Justin ▾

Project: Ad Campaign 2014 ▾

Date: 10/01/2014 1 2

Category: Advertisement material ▾

Article: Sheet 6ft by 4ft, glossy ▾ quantity: 15 + - • Sheet 6ft by 4ft, glossy (15) ✕

Billable: Yes ▾

Comment: For pre-prints.

Add
Cancel

Figure 7.98: Creating an article timesheet.

Such timesheets, belonging to no user in particular, are always displayed on the Range View provided the date range, client and project are right. They are on the other hand not displayed on the Monthly View, as this view rather focuses on worked durations.

7.10.8.4 Modifying timesheets

If user has sufficient Timesheet rights either for herself/himself or All, **and if the timesheet has not been invoiced yet**, service and article timesheets can have the following data changed, by clicking directly on the element :

- for both types : client, project, date and comment ;
- for service timesheets : user, service article, duration and (if applicable) billability ;
- for article timesheets : article, quantity and billability.

Validating changes is done through ✓. To cancel any change, ↶ must be clicked. If the rights are sufficient, timesheet can be deleted through ✕.

7.10.8.5 Printing and exporting timesheets

The Print, Export buttons as available on the *Timesheet Page* (provided user has sufficient rights for 'Print/Export') respectively allow to produce PDF and CSV printouts of timesheets. Clicking on any of those leads to a page with various options.

For the 'Print' page, as featured at Fig.7.100, it is possible to :

Client	Date	Article	Project	Quantity
Marshall Justin	10/01/2014	Sheet 6ft by 4ft, glossy	Ad Campaign 2014 For pre-prints.	15
Total 10/01/2014				15

Figure 7.99: Modifying an article timesheet.

- display timesheets to print by a particular client (or for all), and narrow display by a particular project pertaining to her/him ; by default, client and projects are inherited from the menus on top of the page ;
- choose the format, whether each page will display one client or one project ;
- show the sub-totals by client or project : indeed, on the printout, the duration/quantity for each timesheet element is displayed and then these durations/quantities are summed up. Sub-totals by client and project are relevant when 'All' had been chosen for the 'Client:' and 'Project:' menus on the top of the page ;
- show timesheets issued by oneself, or by any or 'All' user(s) (in the latter cases, provided that user all sufficient "Print management" rights for 'All') ; a box can be ticked so as to to show user name(s) next to each timesheet element. Teams can also be selected ; in which case, timesheets corresponding to users belonging to that team will be shown ;
- the start and end dates in between which timesheets will be displayed. Their default values depend on the current view, whether from 1 to the end of month for Monthly View or the chosen range for Range View ;
- show according to the billing status and the billability ;
- the writing paper on which timesheets will appear, created similarly as described in 13.2.

Here is an example of timesheet printout :

[Timesheet Page] [Print](#) :

Client :	Marshall Justin	▼
Project :	Ad Campaign 2014	▼
Format :	1 client per page	▼
Subtotals :	by client	▼
User/Team :	Writers	▼
Display user :	<input checked="" type="checkbox"/>	
Display details :	<input checked="" type="checkbox"/>	
Display amounts :	<input checked="" type="checkbox"/>	
From :	01/01/2014	
To :	15/01/2014	
Billable :	<All>	▼
Billed :	<All>	▼
Writing paper :	All-Purpose Mailing Template	▼
Print PDF Close		

Figure 7.100: Printing options.

Marshall Justin				
01/01/2014 - 15/01/2014				
Date	Ad Campaign 2014	User/Service	Duration	Price (VAT incl.)
06/01/2014	Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	6h30	650.00
07/01/2014	Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	7h15	725.00
Total	Marshall Justin		13h45	1,375.00

Date	Ad Campaign 2014	Article	Quantity	Price (VAT incl.)
10/01/2014	For pre-prints.	Sheet 6ft by 4ft, glossy	15	450.00
Total	Marshall Justin		15	450.00

The interface for the 'Export' is similar, except there are no format, billable and billed menus ; the output is a CSV file with the following fields featured, for service timesheets :

"Date";"User/Service";"Client";"Project";"Duration";"Comment";
"Billable";"Billed";"Price"

and for article timesheets :

"Date";"Article";"Client";"Project";"Quantity";"Comment";"Billable";"Billed";"Price"

7.10.9 Invoicing timesheets


[Manage Project Page] **Invoices** :


Invoice timesheets

Client : Marshall Justin ▾

Project : Ad Campaign 2014 ▾


User : <All> ▾

From : 06/01/2014 

To : 10/01/2014 

Show pre-invoiced/invoiced :

Show non-billable :

Show 

<input type="checkbox"/>	Ad Campaign 2014	User/Article	Date	Quantity
<input checked="" type="checkbox"/>	Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	06/01/2014	6:30:00
<input checked="" type="checkbox"/>	Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	07/01/2014	7:15:00
<input checked="" type="checkbox"/>	For pre-prints.	Sheet 6ft by 4ft, glossy	10/01/2014	15


Invoice selected 

Figure 7.101: The *Invoice Timesheet Page* : choosing the timesheets to invoice.

The great strength of Blue Chameleon is that it allows timesheets that are billable to be invoiced directly, without going through the shop.

The page to invoice timesheets can be accessed either by the **Invoices** tab or by the **Invoices** button as found on the *Manage Project Page* (7.10.3.2). The latter will more practically pre-load the menus and calendars (client, project, user and range of date) as

seen on Fig.7.101. A checkbox also allows to show the timesheets that had been invoiced and an other one to show those which cannot be billed (which can be useful to retrieve a non-billable timesheet that had been labeled so by mistake).

Timesheets (of whichever type, article or service - for the latter, depending on the chosen user) corresponding to the search criteria are shown, with their general data (project, user/article, date, quantity/duration) and for each a checkbox that allows to select it for pre-invoicing.

7.10.9.1 Pre-invoicing

Clicking on the **Invoice selected** button as seen on the *Invoice Timesheet Page* leads to a page as featured on 7.102, where :

- quantities/durations can be adjusted, if needed (any change in those will be affect the corresponding timesheets) ;
- if article's ordering options (3.3.1.3) allow to, label, unit price or both can be modified.

Invoice selected :

Invoice timesheets [Ad Campaign 2014]

Value date : 15/01/2014	Username: jstn.mrsh73
Posting date : 15/01/2014	Title: Mr
	Name: Marshall Justin
	Address: Prism Avenue 59100 Billings USA
	Status: Ok

Label:

Article	Quantity	Price	Total price	VAT
Polling (phonecalls)	6h30 ▾	100.00	650.00	5.00 %
Polling (phonecalls)	7h15 ▾	100.00	725.00	5.00 %
Sheet 6ft by 4ft, glossy	15	30.00	450.00	5.00 %
Total VAT incl.			1,825.00	
Total VAT excl.			1,738.10	
Total VAT			86.90	

Figure 7.102: From here, quantities/durations and labels may be updated.

Any change has to be **Update**'d. Clicking on **Pre-invoice** leads to the *Pre-invoice Page*, (Fig.7.103) where :

- all timesheets featuring the same article or service **are summed in a single line, with the quantities/durations summed up** : here, the two lines with the service article 'Polling (phonecalls)', one timed at 6:30 hours and the other at 7:15 hours are merged into a single 'Polling (phonecalls)' line timed at 13:45 hours ;
- also, if article's ordering options (3.3.1.3) allow to, label, unit price and summed-up can quantities/durations be modified ;
- new lines can be **Add**'ed ;
- pre-invoice can be saved as a draft (necessary before creating the invoice itself).

The pre-invoice can be accessed later on : the *Invoice Timesheet Page* will feature, for each pre-invoiced timesheet, a click-link (e.g. [Pre-invoice #205](#) that allows to access directly the pre-invoice page.

Pre-invoice / Save as draft :

Pre-invoice #205 [Ad Campaign 2014]

Value date : 15/01/2014	Username: jstn.mrsh73
Posting date : 15/01/2014	Title: Mr
	Name: Marshall Justi
	Address: Prism Avenue 59100 Billings USA
	Status: Ok

Label:

Article	Quantity	Price	Total price	VAT	
Polling (phonecalls)	13 hours 45 minutes	100.00	1,375.00	5.00 %	
Sheet 6ft by 4ft, glossy	15	30.00	450.00	5.00 %	
Total VAT incl.			1,825.00		
Total VAT excl.			1,738.09		
Total VAT			86.91		

Figure 7.103: The pre-invoice, just after it saved as a draft.

7.10.9.2 Finally creating the invoice

Once all changes have been done to the pre-invoice (and they can be done and saved all along the project's life), the invoice can finally be created by clicking [Generate invoice](#).

As a result, the *Invoice Timesheet Page* is shown back, with now for each invoiced timesheet a reference to the created invoice. It should be noted that, for 'service' articles, the quantity (which can only be an integer) is given as minutes, the (unit) 'Price' being the hourly rate :

Ad Campaign 2014	User/Article	Date	Quantity	Invoice
Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	06/01/2014	6:30:00	201401150100000191 Details
Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	07/01/2014	7:15:00	201401150100000191 Details
For pre-prints.	Sheet 6ft by 4ft, glossy	10/01/2014	15	201401150100000191 Details

7.10.9.3 Details on invoiced timesheets

When several timesheets are selected for invoicing, a few of them may correspond to the same article, for instance a 'service' article performed at several dates. In order to make the final invoice as succinct as possible, **those identical articles are condensed in a single line : their quantities or duration as well as their total prices are be summed up**, provided there was no change in label or unit price.

It is still then possible to get the full details of a series of invoiced timesheets, through the [Details](#) button as found right to the invoice reference.

On subsequent page, full details about the invoiced timesheets are shown, but most interestingly, it is possible to [Print](#) those details, giving a result rather similar to the timesheet PDF printout (7.10.8.5).

This way, if a series of timesheets had the same articles repeated a few times (for instance the same service performed at different dates or by different users), **this print-out, giving the full details of what has been done, completes nicely the invoice printout, which is condensed.**

[201401150100000191](#) [Details](#) :

Invoice details

Reference : [201401150100000191](#)

Client : Marshall Justin

Date : 15/01/2014

Date	Ad Campaign 2014		Duration/Qty	Price (VAT incl.)
06/01/2014	Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	6:30:00	650.00
07/01/2014	Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	7:15:00	725.00
10/01/2014	For pre-prints.	Sheet 6ft by 4ft, glossy	15	450.00
TOTAL (VAT incl.)				1,825.00

Display user Display details

[Print PDF](#)

Figure 7.104: Full details of a series of invoiced timesheet, which can be printed out.