we do web stuff

Suite 80, Plaistowe Mews
City West Centre, West Perth
WA 6005, Australia
T: 08 9322 8599
F: 08 9322 8699
www.eduka.com

EVO BASE SYSTEM HELP MANUAL

Welcome to the Eduka Virtual Office – eVO.

This document will outline the basic operations of the base eVO system.

If you have had customisations made to eVO and you wish to have a specific manual created for your customised version, contact us online at www.eduka.com, by phone on 08 9322 8599 or by emailing support@eduka.com

Contents

1 Entering your timesheets

When you log in to the system, you will see a calendar in which you can enter your time. If you are elsewhere in the system, click "Timesheets" on the main menu.

The calendar will be set to the current working week. This screen will display any hours that you have already entered, and also facilitates the adding of more timesheet data. You can view and enter information by day, by week or by month. The week view is the default.

1.1 Navigating the calendar

The calendar that appears on screen will automatically set itself to the current working week. If you want to move to a different day or week, you can use the smaller "side calendar" to navigate through days, weeks and months. If the date you want to look at is not in the current month, then hit "previous" or "next" to move back and forth between months.

1.2 Entering Time in Week View

- Click on the day that you want to enter time for.
- A small data entry screen will pop up.
- Select a project, an activity and enter the time you spent on it as a fraction of an hour. So, if you spent 45 minutes working on something, you enter 0.75 (75% of an hour).
- Enter a description of the specific work you did, to help the accounts department when billing clients.
- Check the "Bill?" box if the work was billable to the client; if not then un-check the box so that it is blank.
- When you have entered all the times for that project, click the blue disk icon to Save.
- Repeat the process for all your tasks throughout the day.
- To edit data you have already entered, simply click the project and the screen

1.3 Entering Time in Day View

You may find it preferable to enter or view your times in Day view. Here's how:

- First, click the "Day" button on the top right of the Timesheet calendar.
- The view will change to show data for a single day.
- Click on the name of the day you wish to enter times in.
- In the popup window that appears, select from the Projects dropdown the name of the project you have been working on, select the task you were performing and then enter the time you spent working on it.
- Times must be entered in fifteen minute blocks, so that if you spent 45 minutes working on something, you enter 0.75 (75% of an hour).
- For each task you also have the option of entering a description for the task that was performed.
- Click the little black disk to save your time. This will close the little window.

2 Administrative Functions

2.1 Users

Adding a New User (Staff Member)

Only Administrator users have access to this section.

On the menu, choose the “Add User” option under “Users”.

Enter the user’s details, taking note that their password must follow a specific format for security purposes:

- Must be 6 characters or more
- Must include an upper case letter
- Must include a lower case letter
- Must include a number
- Must not include any spaces

2.2 Clients

Adding a New Client

On the menu, choose the “Add Client” option under “Clients”.
Enter the client’s details and click “save”.

Viewing the client list/searching for a client

Choose “Clients” from the menu on the left in order to see the client listing.

To search for a specific client, simply enter all of the details you know about the client in the search area at the top of the client list, and press “search”. All clients that suit your search criteria will display in alphabetical order.

2.3 Contacts

Adding a Contact from the Client Screen

There are two ways to add a Contact to the system – either from the “Contacts” module, or from the screen of the client they are associated with.

If you are in the client details screen and wish to add a contact to that client, simply scroll down the page until you see “Contacts”, and choose “Add Contact”.

You will be required to enter certain information about the contact and then click “save”.

Adding a Contact from the Contact module.

On the menu, choose the "Add Contact" option under "Contacts".

Enter the person's details and click "save".

2.4 Projects

Adding a New Project

- On the menu, choose the "Add Project" option under "Projects".
- Enter the project details and click "save".
- To ensure the project displays on the Timesheet of all relevant employees, click the "Assign Resources" tab and tick the employees that have been assigned to that project. They will then be able to add time against it.

Viewing the project list/searching for a project

- Choose "Projects" from the menu on the left in order to see the project listing.
- To search for a specific project, simply enter all of the details you know about the project in the search area at the top of the project list, and press "search". All projects that suit your search criteria will display in alphabetical order.

Editing a Project

- Once you have found the project you want to modify, click the "pencil" next to the project name to edit the project information.
- Enter your changes and click "save".

2.5 Employees

This is where you can add new employees ("users") who are able to use the timesheet system.

Adding a New Employee

- On the menu, choose the "Add" option under "Employees".
- Enter the person's details and click "save".
- This person will be able to login to your eVO system using the username and password that you supply them with.

Viewing the employee list/searching for an employee

- Choose "Employees" from the menu on the left in order to see the employee listing.
- To search for a specific person, simply enter all of the details you know about them in the search area at the top of the employee list, and press "search". All employees that suit your search criteria will display in alphabetical order.

Editing an Employee

- Once you have found the employee you want to modify, click the "pencil" next to the person's name to edit their details.
- Enter your changes and click "save".

2.6 Reports

The reports in the system can be customised to suit your specific reporting requirements.

- To view reports, click the “Reports” option.
- View the summary report to see all time within the system. Remember you can choose to see only billable items (useful for end of month billing) or you can un-check the “billable items only” option to see all items for all users.
- View the Timesheet Report to see the time entered against each project, by one particular user or by all users.
- To select which user you view the time for, click their name in the box on the right so that it is highlighted by a blue bar.
- If you want to see more than one user, use the control button (ctrl) when you click the mouse to select multiple users.

3 Customisation

The beauty of EVO is that it is easily tailored in many ways so that you end up with a solution that directly reflects the way your company works.

For additional customisation, such as creating specific reports, we would need to spend an hour or two understanding your exact requirements before we could quote for the work. Get in touch with us if you’d like to know more about this.

4 Further Help

If you run into problems or have questions about the system, contact Eduka on the details below. Note that Eduka is a Western Australian based company and as such our support is available 8am to 5pm AWST, at our standard hourly rate.

email support@eduka.com
website http://www.eduka.com
telephone +61 8 9322 8599