



Additional Options

User	Project	Total Budget	Remaining Budget	Client	End Date	Start Date
bruce	Algemeen	300.00	292.00	Ring niet ingevuld	-	-
bruce	LOPTR-01	250.00	245.00	Bas van der Meijden	20090101	20070101
bruce	LOPTR-02	175.00	170.00	Bas van der Meijden	20090101	20070101

Budget Allocation Tool



Journyx Timesheet™ is a timesheet and expense management solution for the entire enterprise.

Timesheet Customizable modules or add-ons

Journyx offers customizable modules (or add-ons) that expand the standard functionality. Which add-on is interesting for you, depends on the needs of your organization. Add-ons are easy to install on top of the standard Timesheet software and are maintained by Journyx.

This document describes the Budget Allocation Tool.



Summary

Have you ever wanted that your employees take more interest in their planning, to enable them to see how much time they have been allocated per project and how much time remains to finish the job?

The **Budget Allocation Tool** enables you to show the allocated time, per project, on the users time entry screen. This informs the user how much time is reserved to complete his or her work for a project. The remaining time is automatically calculated and shown on the screen whenever a user starts working on a project. This information helps your employees to keep track on their progress and allows them to contact the project manager when they estimate that the remaining time is insufficient.

Is it complicated to use?

No, in fact it couldn't be any simpler. After installation of the software you can import the budget allocation data into Timesheet with just a mouse click.

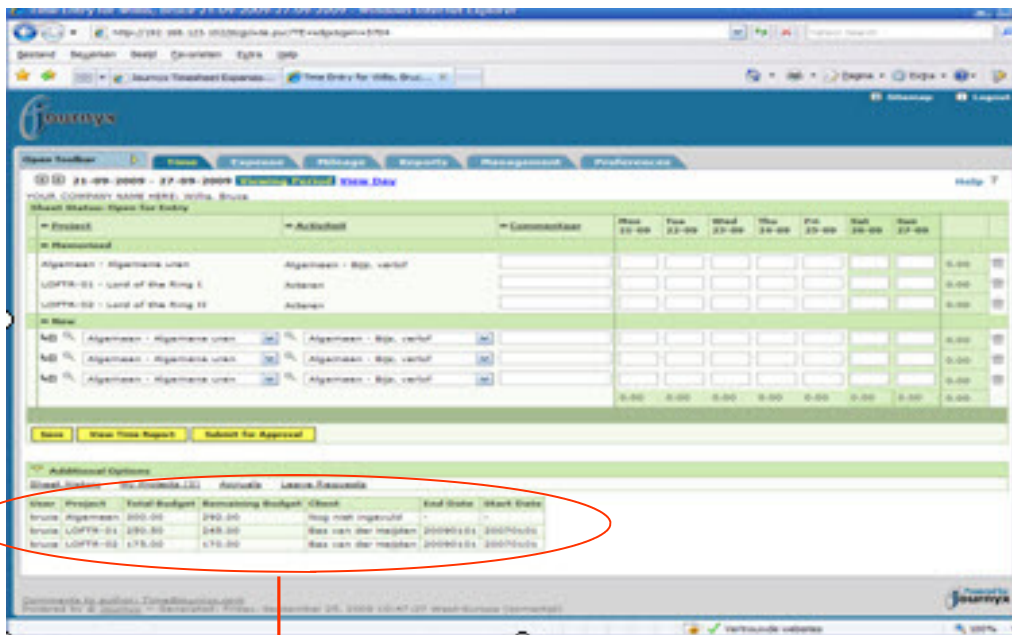
You can create the import file in Excel (or any other spreadsheet software you might use). The import file consists of 3 columns:

- 'User', which contains the login-id of the user for whom you want to create budget lines on the entry screen,
- 'Project', which contains the project name for which a budget is allocated and
- 'Budget', the number of hours that needs to be allocated to that user and the project.

Create lines for every user and project for which you want to allocate a budget. After you're done, save the sheet as a Tab delimited text file and you're ready to import the budget allocation data.

The imported data is displayed on the users time entry screen. The user can see how many hours are allocated to him (or her) for every project for which allocated time was imported. Also shown is the amount of remaining hours to complete the project tasks (whenever a user writes time on a project with an allocation, the written hours are automatically deducted from the project budget allocation).

Screenshots



This is a sample of a users Time Entry Screen. At the bottom a new table is added with the budget allocation information.

User	Project	Total Budget	Remaining Budget	Client	End Date	Start Date
bruce	Algemeen	300.00	292.00	Nog niet ingevuld	-	-
bruce	LOFTR-01	250.50	245.00	Bas van der Heijden	20090101	20070101
bruce	LOFTR-02	175.00	170.00	Bas van der Heijden	20090101	20070101

This is an enlargement of the allocation table that is displayed on the Time Entry Screen of the user 'bruce'. Bruce sees the following information:

- Bruce is planned in for 300 hours for project 'Algemeen'. He has already spend 8 hours so the remaining budget is 292 hours.
- He has also a budget of 250.5 hours for the project 'LOFTR-01'. He has spend 5.5 hours already, so the remaining budget is 245 hours.
- The same applies for the project 'LOFTR-02': budget is 175 hours, already spend 5 hours so the remaining budget is 170 hours.

He also sees 3 additional fields in the table: 'Client', 'End Date' and 'Start Date'. These fields are custom fields defined at the project level. You can choose which custom fields are displayed in the table. For example you could add the project managers name, e-mail address or phone number so that Bruce knows who to contact if the remaining budget is insufficient.

	A	B	C
1	User	Project	Budget
2	bruce	Algemeen	300
3	bruce	LOFTR-01	250.5
4	bruce	LOFTR-02	175
5			

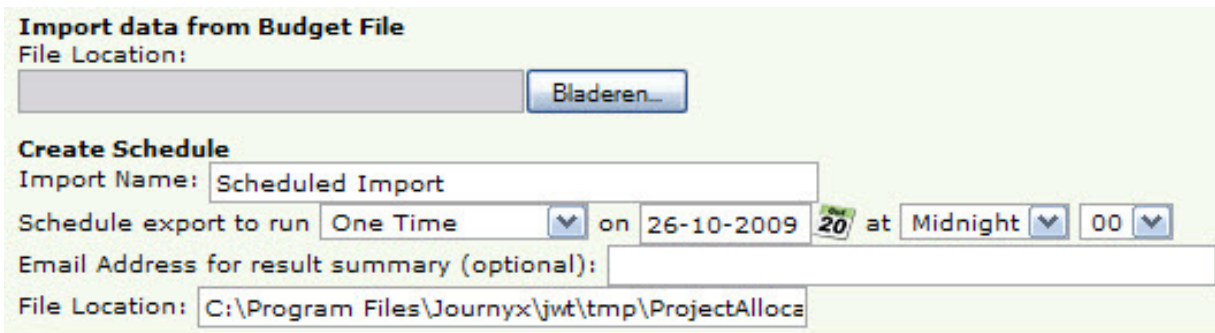
Sample import file

The displayed information may help your employees to keep things in perspective when you don't use a project planning tool (like MS Project) to keep employees on track (within budget and timeline). It's easy to import budget data in Timesheet and it's easy to understand for employees.

Import and Export options

Import settings:

- You can set a default location for the import file.
- You can schedule the import of the budget allocation file (one time, custom, daily, Weekly, bi-weekly, monthly by day or monthly by date).
- You can specify whether existing values are removed from the system before importing new values from the import file (Note: if you select 'No' here the import will update existing values and create new values where appropriate).



Import data from Budget File

File Location:

Create Schedule

Import Name:

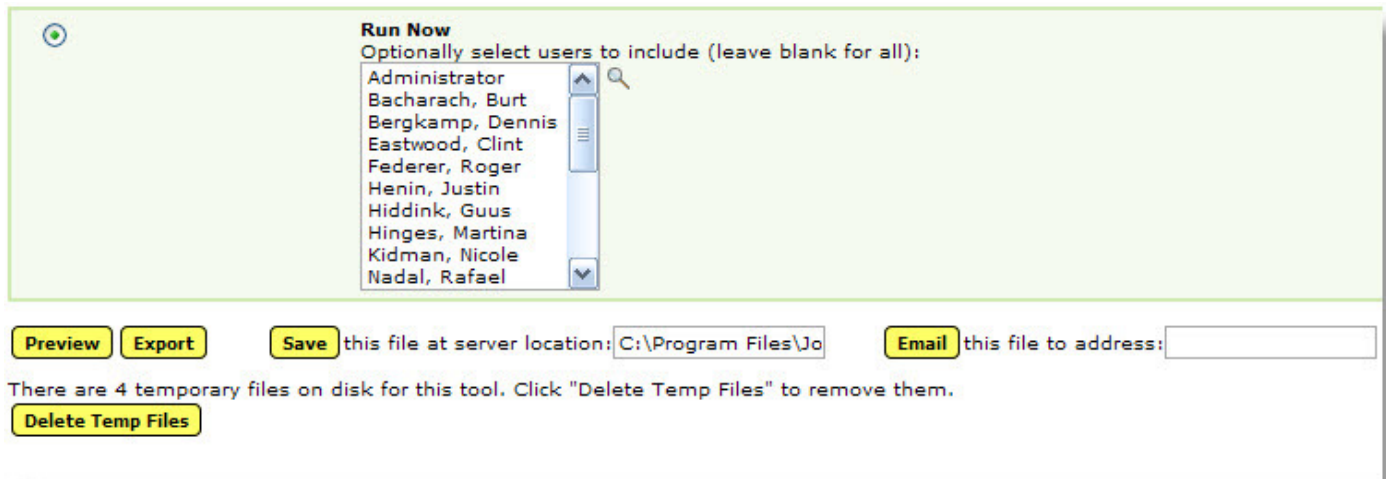
Schedule export to run on at

Email Address for result summary (optional):

File Location:

Export settings:

Budget Allocation data can also be exported from Timesheet. The export file has the same format as the import file with the project custom fields that are displayed in the Budget Allocation Table on the Time Entry Screen.



Run Now

Optionally select users to include (leave blank for all):

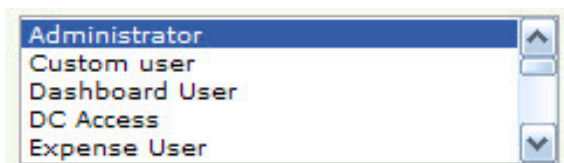
- Administrator
- Bacharach, Burt
- Bergkamp, Dennis
- Eastwood, Clint
- Federer, Roger
- Henin, Justin
- Hiddink, Guus
- Hinges, Martina
- Kidman, Nicole
- Nadal, Rafael

this file at server location: this file to address:

There are 4 temporary files on disk for this tool. Click "Delete Temp Files" to remove them.

Exports can also be scheduled. The export file gives you an instant overview of the status (budgeted versus remaining hours) per user, per project. The export file can be stored in a predefined location or in a location you specify when you run the export or the txt-file can be send to a specific e-mail address.

You can also define which authorization role has access to the Budget Allocation import & export functionality.



- Administrator
- Custom user
- Dashboard User
- DC Access
- Expense User

Frequently Asked Questions

What happens when the remaining hours are zero?

The remaining hours will continue to count down and display negative hours.

Can this tool send automatically send an e-mail to the project manager if the remaining hours are less than X hours?

No, the standard version of this tool basically provides the import, export functionality and displays the budget data on the users Time Entry Screen. However, our Professional Services team will gladly discuss your additional wishes and see whether it's easy to incorporate in the tool.

How much does this tool cost?

Please contact your sales representative for either a demo of the tool or a price quote.

Is it possible to try out the tool for a certain period of days?

No, please ask for a demo to see whether the tool fulfils your needs.

Are there any other solutions to handle allocated time in Timesheet?

Yes, there are:

- You can use accruals to enable the user to see how many hours per project activity still remains. Accruals are set up using the 3rd column on the Time Entry Screen (default name of the column is 'Pay Type'). The difference with the Budget Allocation Tool is that accruals are set up at the project task level while the Budget Allocation Tool is set up at the project level.
- For larger companies (100+ licences) ProjectXecute is probably more interesting. Journyx ProjectXecute unites projects, initiatives and organizational planning with resource workload management, tracks execution and alerts you instantly when projects are in danger.
See for more information: <http://www.journyx.com/execute/>

Need more information?

We will gladly provide you with anything you need, so don't hesitate to contact us!

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