Project management software

Executive training

What is it?

The project management software is designed for managing projects and costs, specifically tailored for companies that primarily work from electronic devices, based on four fundamental pillars:

100% Automatic: Data collection is performed automatically, ensuring complete objectivity. You receive quantifiable recognition for your contribution to the results.

:**Transparent**: Employees can access their data at any time. It helps you understand how you manage your time, improve work habits, and become more productive..

Respects privacy: The application only measures activity times, productivity, and application usage. It does NOT read document contents, emails, or take screenshots.

Protecting employee well-being: It allows setting up digital disconnection rules to notify the employee when they have been working on the PC for too long, helping protect their digital health.

More than project measurement software

Presence vs. Actual activity

You can understand how your employees allocate their time across the different projects they are assigned. Additionally, you can access how your employees break down their activity by tasks and subtasks.

Profitability by project

Monitor the profitability and margin of your projects, thanks to the automatic calculation of costs and billing. You will also know which projects are generating the highest profit for your organization.

Comprehensive reports*

You can schedule reports and receive them periodically via email, allowing you to track the most important indicators for your organization.

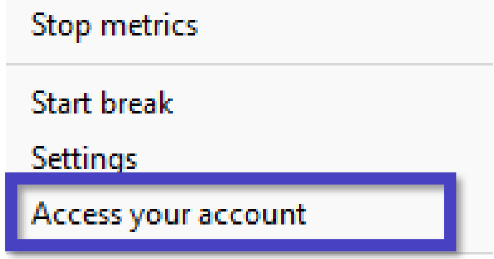
Basic | Concepts

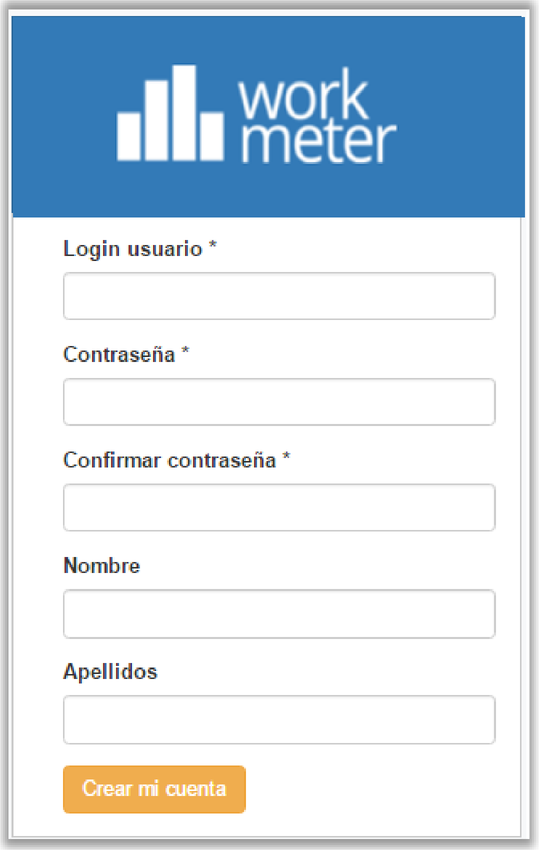
- **Project:** The active range time is calculated based on the start and end times of activity detected by the tool.
- **Activity:** "Activity" is the time spent interacting with the computer, working on projects.
- **Forecasts:** Indicates the real-time progress of each project compared to the initial estimates.
- **Cost:** This is the monetary cost of your projects. It is calculated by entering the hourly cost for each employee participating in the project.
- **Billing:** Represents the amount to be billed for each project. It can be calculated in two ways: by entering the billable hourly rate for the project or by specifying the billable hourly rate of each employee involved in the project.
- **Margin:** Represents the profit you will gain from your projects. It is the difference between the billing amount and the costs associated with the projects.
- **Activity editor:** You can add offline activity and link it to your projects, such as meetings, business visits, phone calls, etc.
- **Conditional rule system:** A unique technology in the market capable of detecting which project you are working on and automatically assigning time to it in an objective manner. No more errors, potential forgetfulness, and especially no more manual reporting time from employees.

First steps| Create user account

To view your data, you first need to create a WorkMeter account. To do so:

1. Right-click on the project management software icon that appears in the taskbar. If you can't find the icon in the toolbar, it might be in the hidden icons.





2. Right-click on the icon, and a menu with different options will appear. Click on the **Access your account** option and fill in your details.

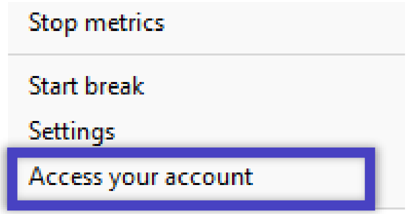
First steps | Access

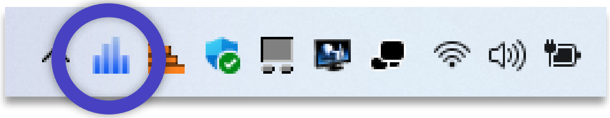
To access:

- **Through the WorkMeter button located in the taskbar (two alternatives):**

  - Double-click

  - Right-click > Access your account



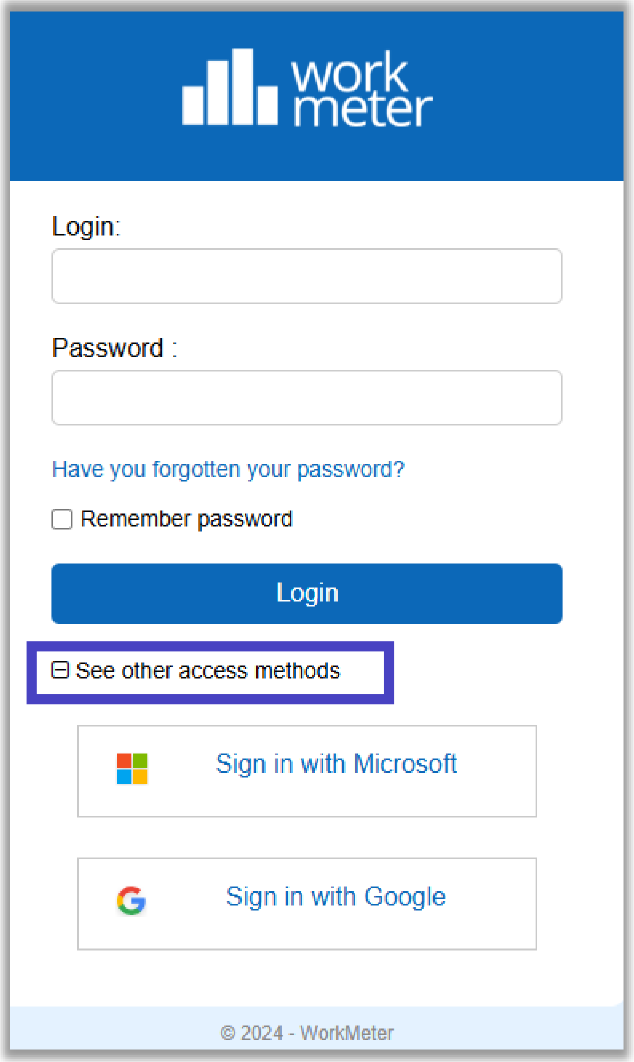


- **Through the following link:**

https://timework.workmeter.com/

We recommend bookmarking it in your browser for easier access.

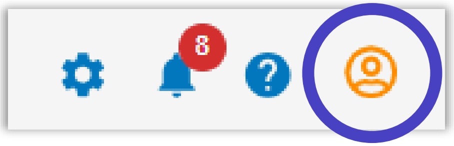
WorkMeter allows you to quickly log in to the platform using your Microsoft or Google account.

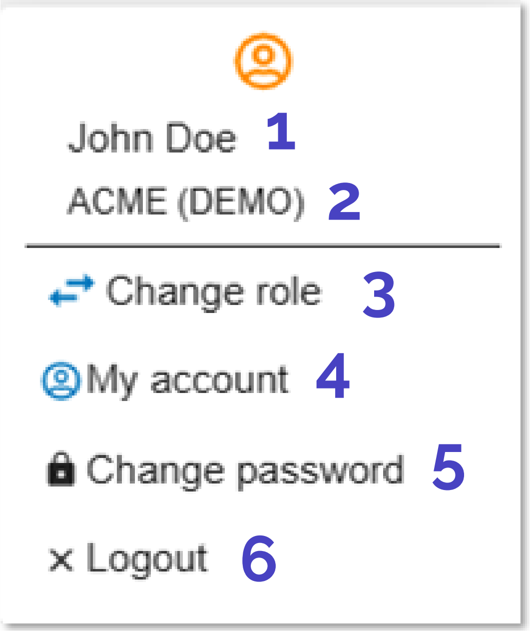


First steps | Dual profile

The project management software offers an employee or administrator view, depending on the configured access.

At the top of the tool, you will see the profile with the following box displayed:



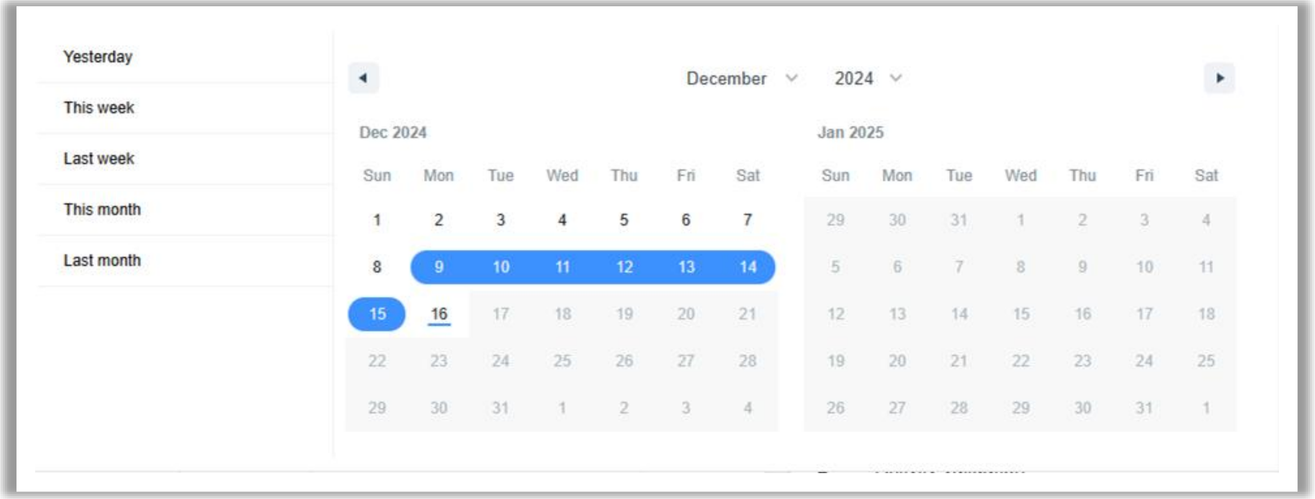


1. Employee name
2. Company name
3. Change role: Employee/Administrator
4. Access profile
5. Change password
6. Log Out

First steps | Filter

The filter at the top right of the screen allows you to analyze data by date range.

There are predefined values that automatically adjust when selected.



To select a specific day, choose the same day as both the start and end date in the calendar.

If the date range is less than a day, the data will be displayed in hours; if the range is longer, the chart data will be shown in days.

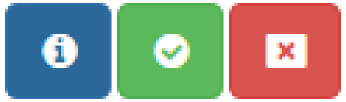
First steps | Notifications

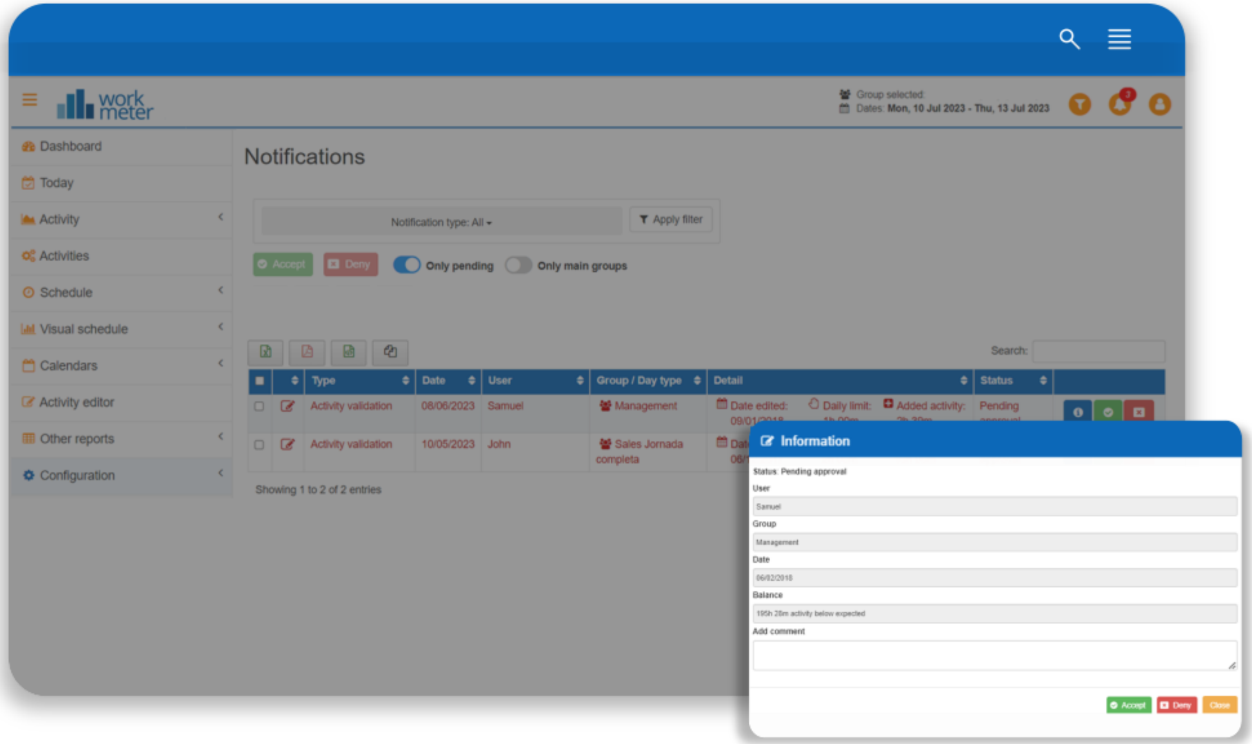
In the top right, you will find an icon shaped like a bell that gives you access to the notifications area.

In this panel, the administrator or group manager can accept or deny activity edit requests in projects.

In the notifications area, you can see the employee making the request, the group they belong to, whether it's pending, and a summary of the notification.

They are approved or denied using the buttons located on the right side of each notification.

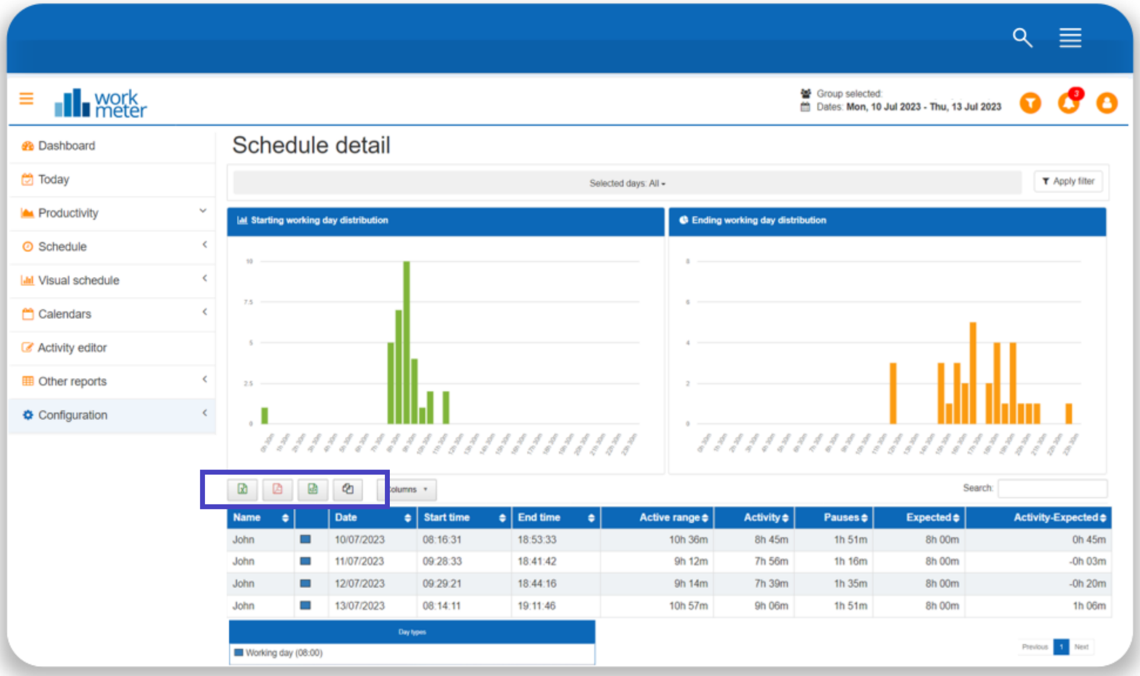




First steps | Export data

All panels have the option to export data in various formats: PDF, CSV, and Excel.

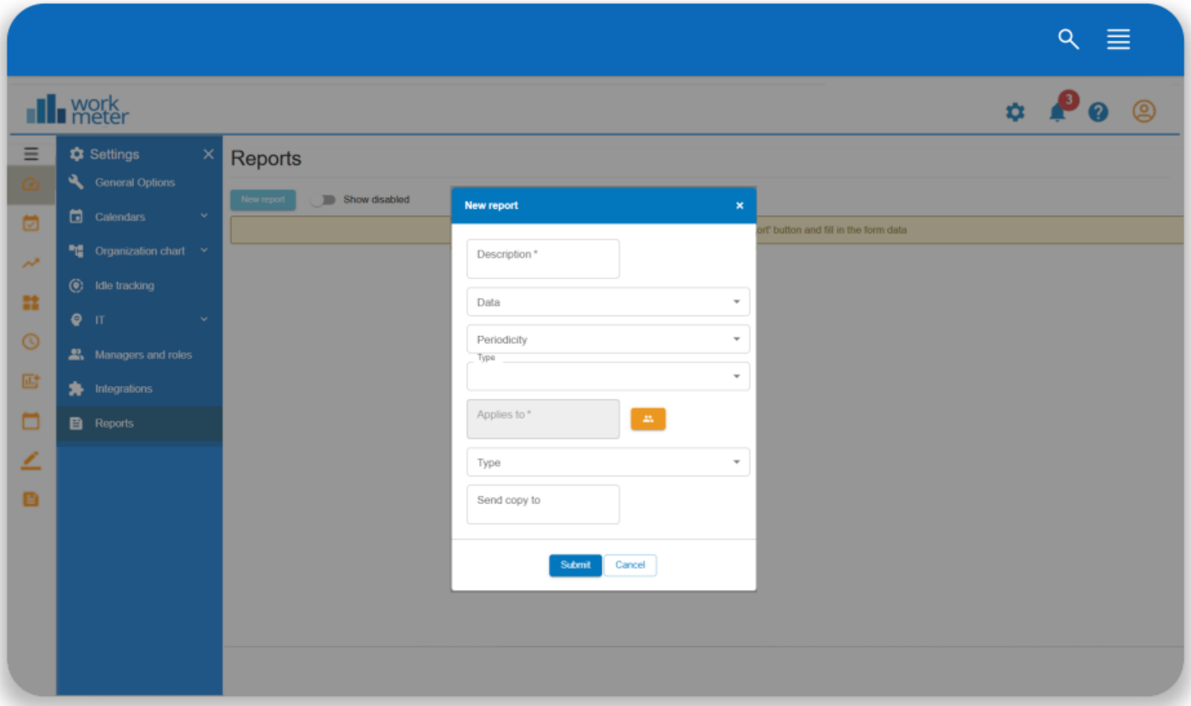
When exporting to Excel, the data appears in hours and seconds.



To print a report for a specific employee, you should select that employee, choose the start and end of the month in the filter, and export it to PDF.

First steps | Schedule reports

Reports can be scheduled from the settings section.



Reports allow you to:

1. Assign a name to the report.
2. Select the panel from which you want to obtain the information.
3. Choose the frequency of the report.
4. Select the group or employee for whom you want the report.
5. Download the report in PDF, Excel, or HTML format.

NOTE:

If we want the report to be sent to another team member or company manager, we can include their email address.

First steps| How to configure projects?

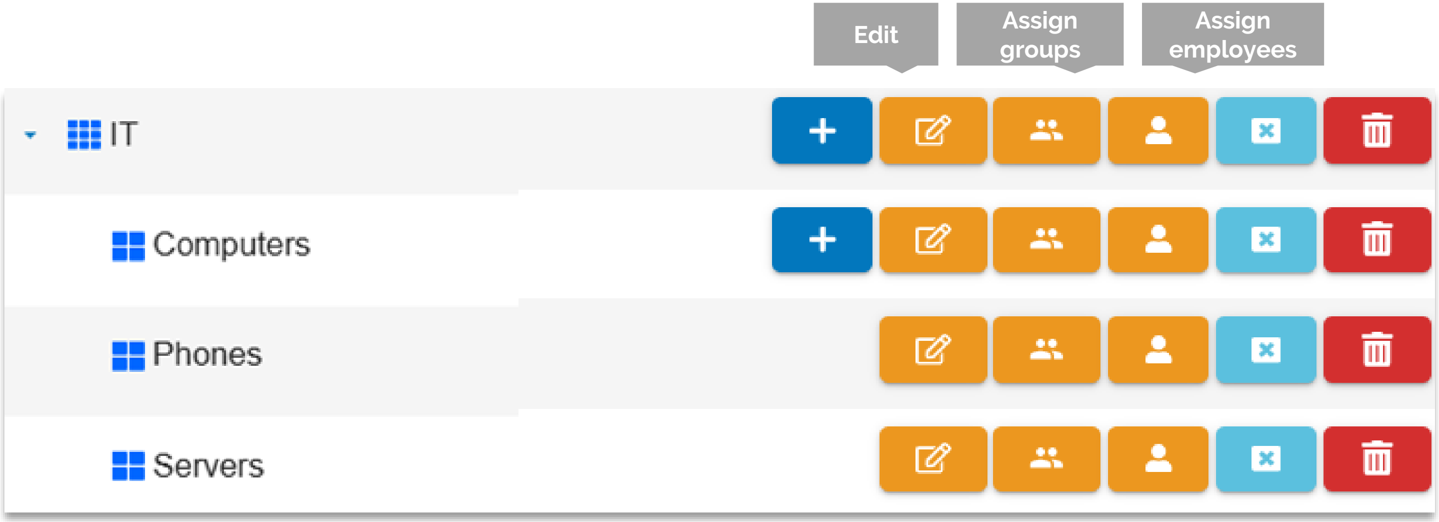
The first step to linking your activity to the corresponding project is to start configuring the work projects.

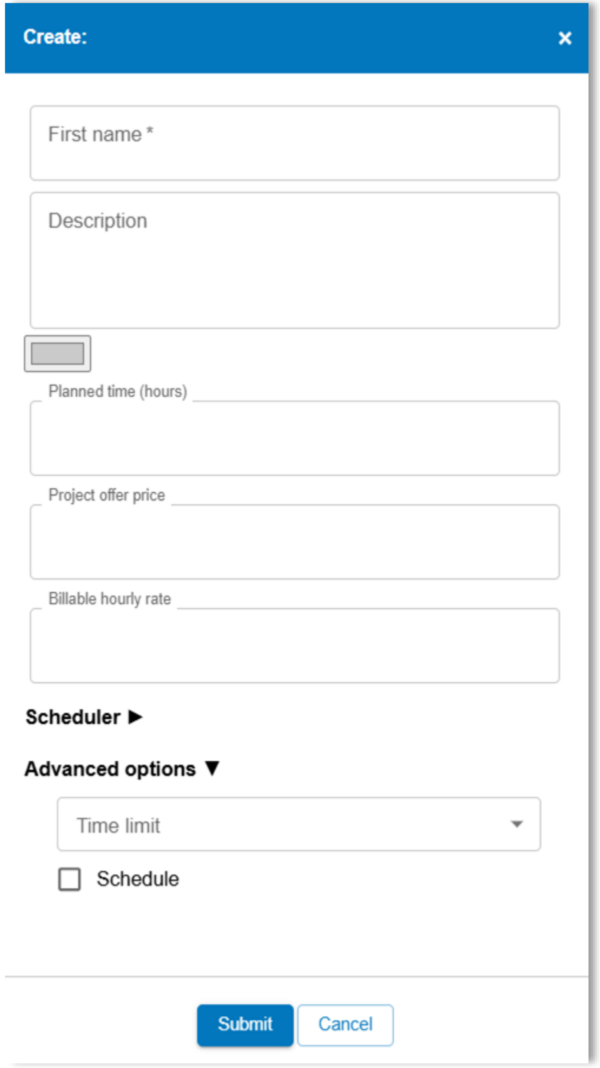
To do this, go to **Configuration > Projects > Configure projects** and click on the button.

A window will open on the right with different options to configure the project.

Similarly, you can create **tasks or subtasks** (by clicking on +).

Additionally, each project, task, or subtask can be assigned to a group or employee.



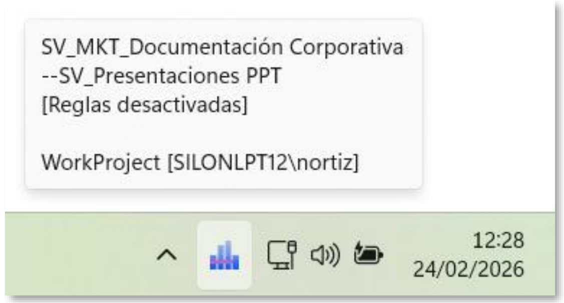


First steps | How to allocate time to projects

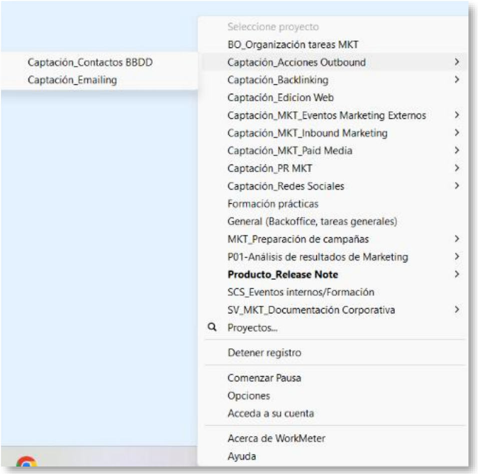
Manual project assignment

When the system doesn't automatically detect the correct project or you need to modify the assignment, you can do so directly from the WorkMeter icon in the taskbar.

1. **Access the WorkMeter icon:**
Locate the blue WorkMeter icon in the taskbar (usually in the lower right corner of the screen).



2. **Select the project:**
Left-click on the WorkMeter icon. A list of projects associated with your profile will be displayed. Select the relevant project. If there are subprojects, expand the option and choose the appropriate one.



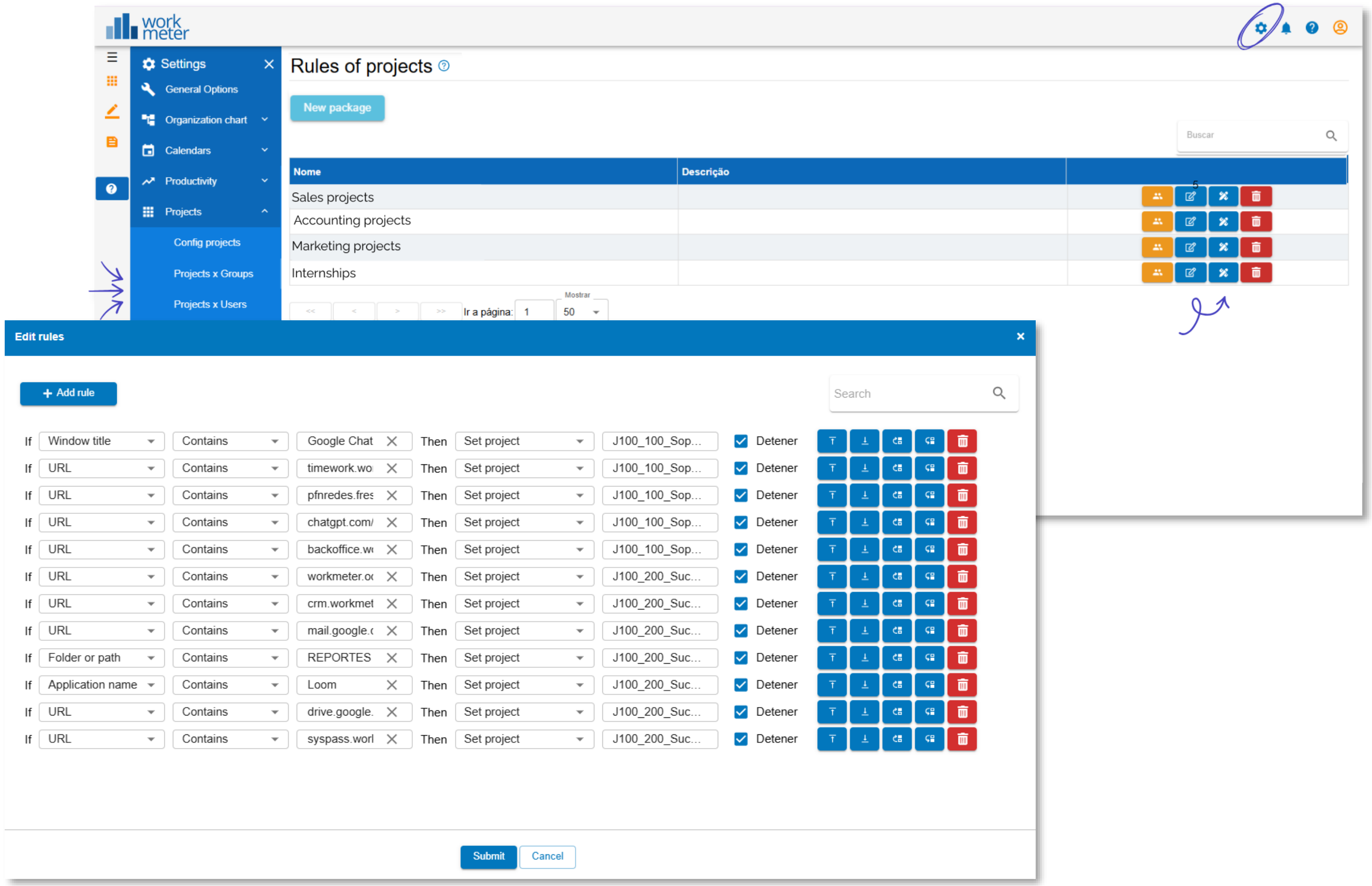
3. **Confirm the change:**
When you select the project or subproject, a confirmation message will appear indicating that the change has been made successfully.

First steps | How to allocate time to projects

Automatic assignment of rules to projects

Automatic assignment is performed using rules configured in the projects section:

1. Go to ***Settings > Projects > Project Rules.***
2. Create a new rule or edit an existing one.
3. Define the condition that will trigger assignment (for example: window title, URL, application name, or folder).
4. Specify the action: Assign to the corresponding project.
5. Save the rule and assign it to the desired group.

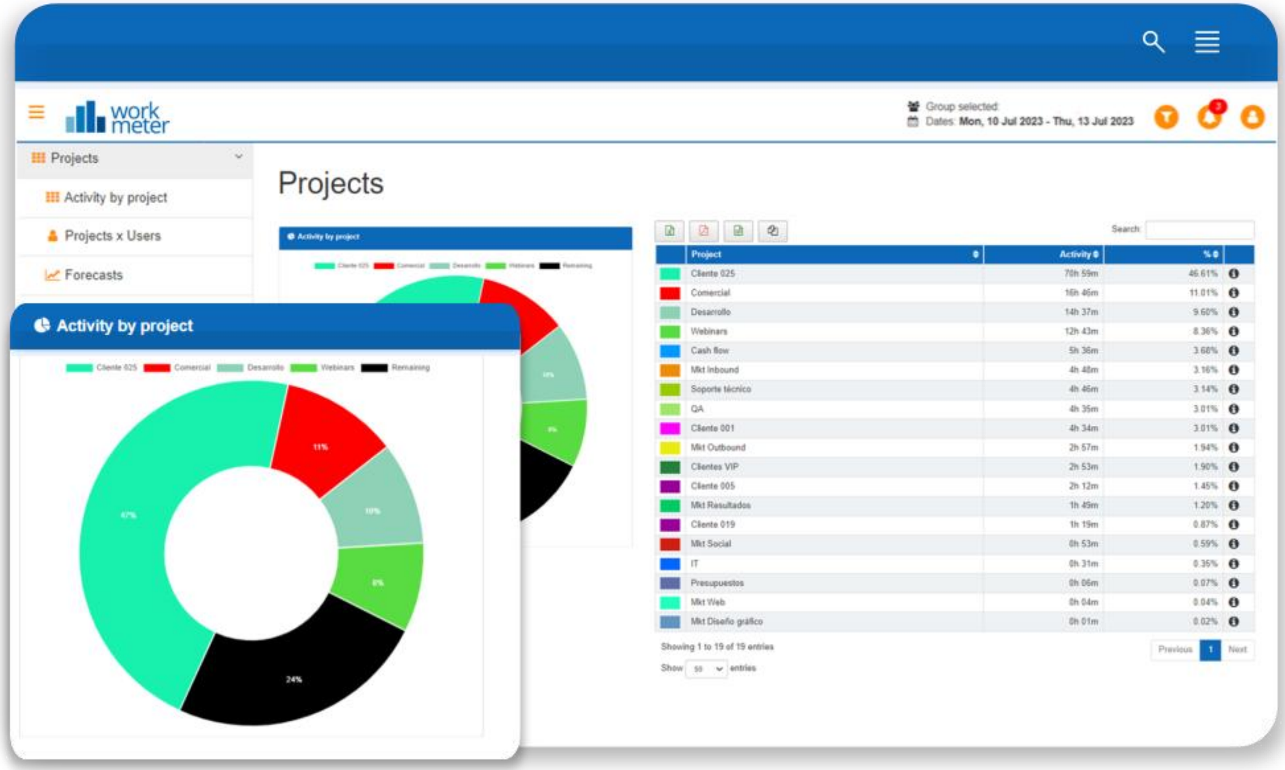


Once configured, the system **will automatically detect the active work environment and allocate time to the defined project,** without the need for manual intervention.

Panels

Performance management software

Projects | Activity by project



This panel provides a visual summary of all projects with information on the total activity recorded in each of them.

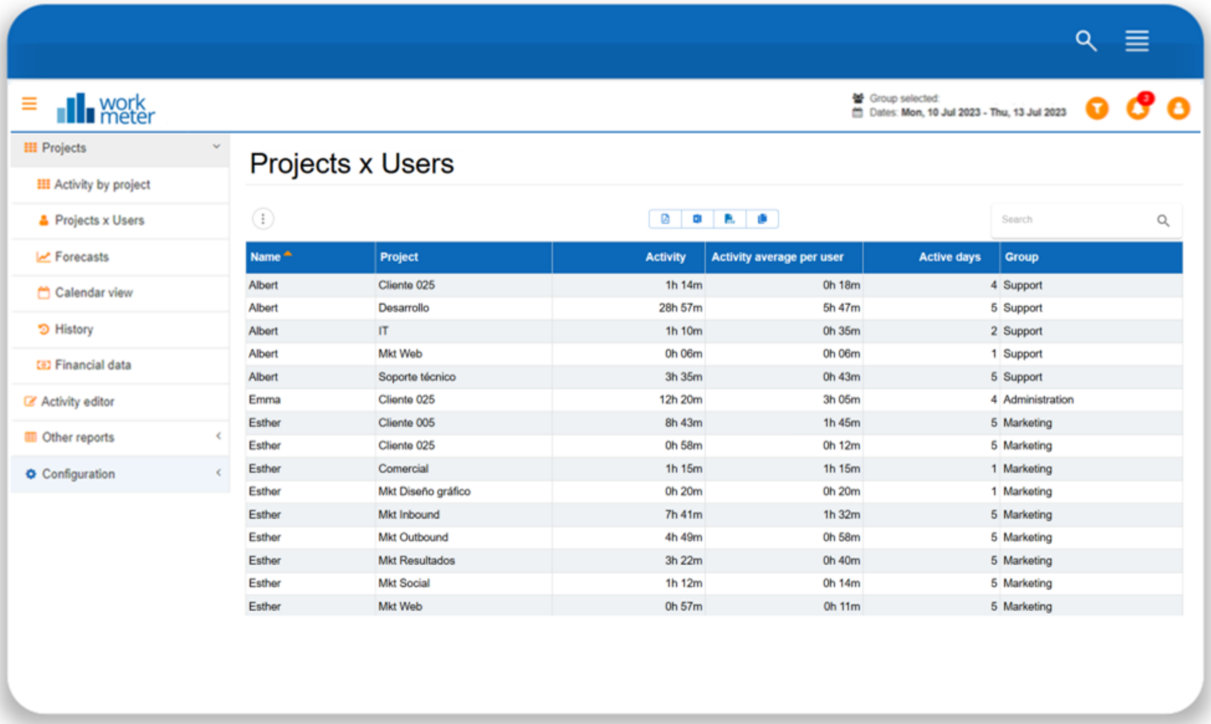
The information is presented in both a chart and a table format.

- Project
- Total activity
- Percentage of activity each project represents out of the total

By clicking on the icon or on a color in the pie chart, you will be taken directly to the activity breakdown of that project by day.

Projects | By users

This panel displays all the projects assigned to employees:

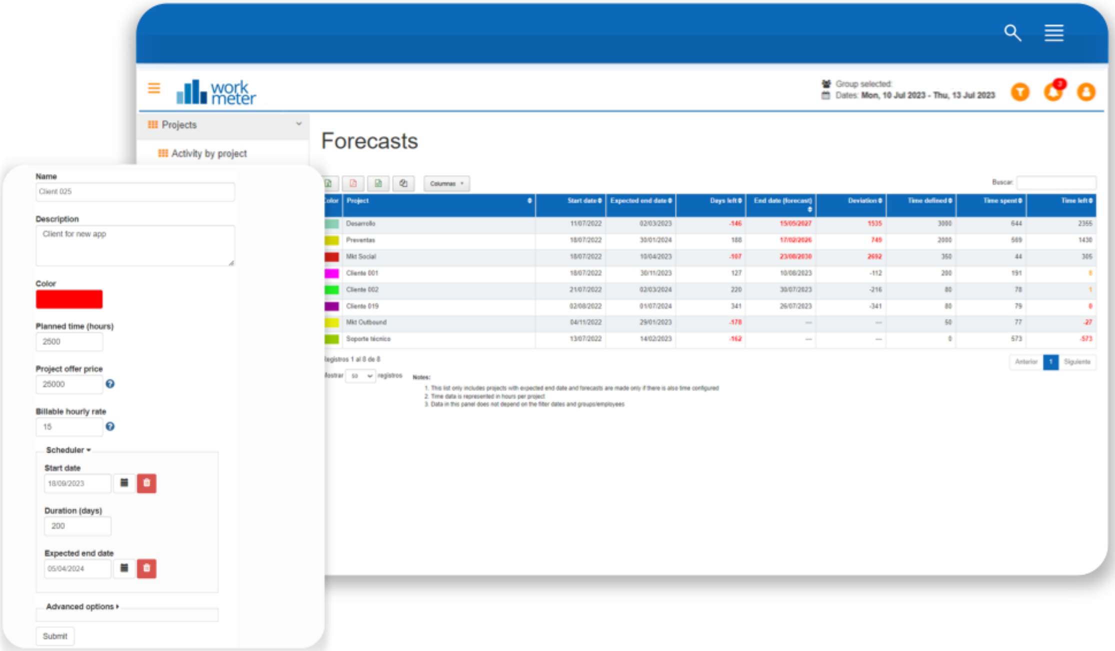


- **Employee name**
- **Project:** Name of the project
- **Activity:** Total activity recorded from your team in each project for the selected date range
- **Average activity per day:** The daily average of activity the employee has reported in each project for the selected date range (active days column)
- **Active days:** The number of days the employee has reported activity in each project during the selected period
- **Group:** The group to which each employee belongs

The data can be sorted alphabetically, and you can use the search tool to more easily find an employee and view the projects they have been assigned or vice versa.

Projects | Forecasts

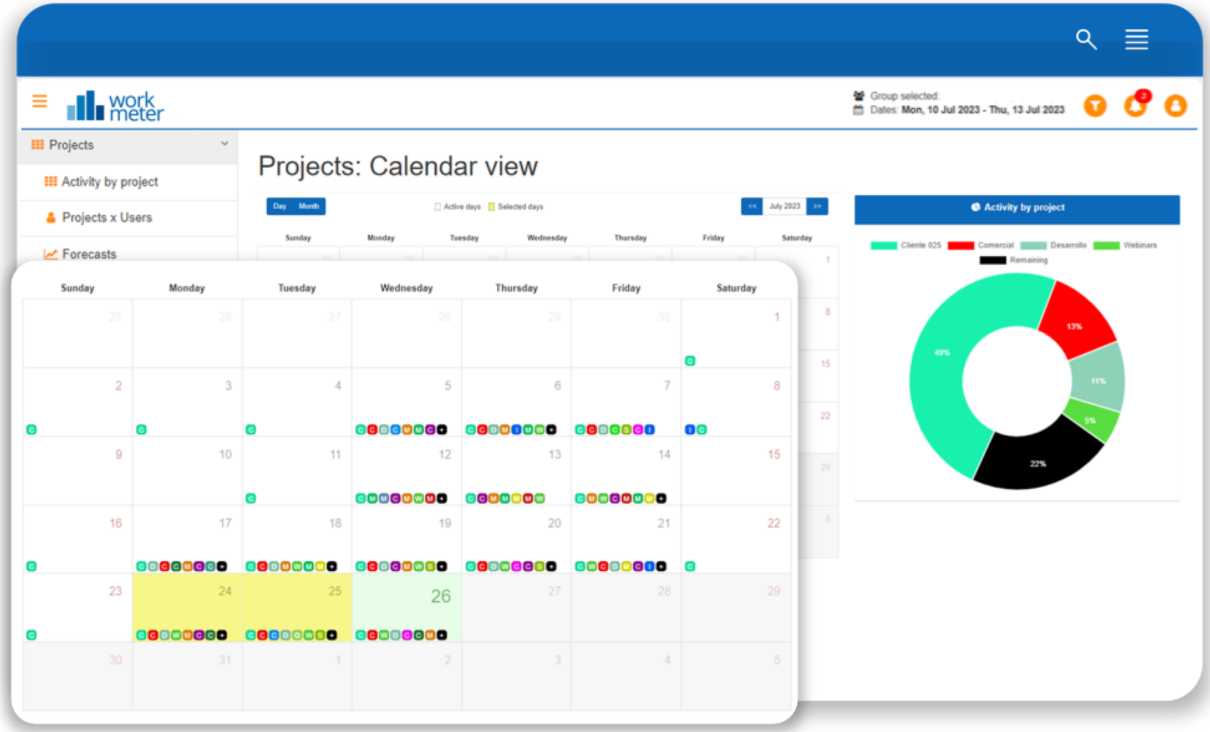
This panel helps you monitor potential time deviations between your initial forecasts for each project and the actual data recorded so far. Specifically:



- **Project name**
- **Start date:** The date when activity starts being recorded for the project
- **Expected end date:** The expected project completion date (set when configuring the project)
- **Remaining days:** The number of days left until the project end date
- **Expected completion:** The project's expected completion date based on its current progress and estimated hours
- **Deviation:** Displayed in days, this can be negative (the project will finish X days ahead of schedule) or positive (the project will finish X days behind schedule)
- **Estimated time:** The projected duration of the project in hours (set when configuring the project)
- **Time consumed:** The hours spent on the project up until the moment of the query
- **Remaining time:** The hours left until project completion (estimated time - time consumed)

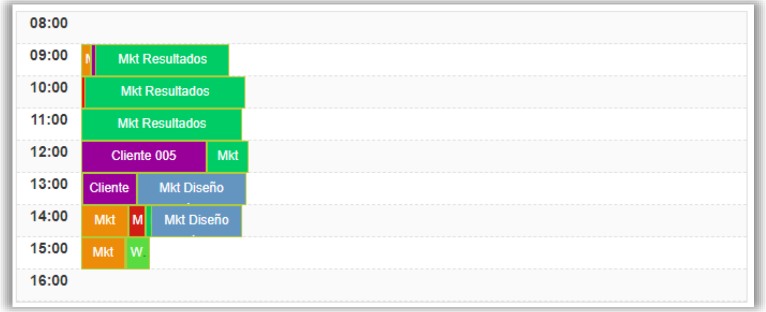
Projects | Calendar vision

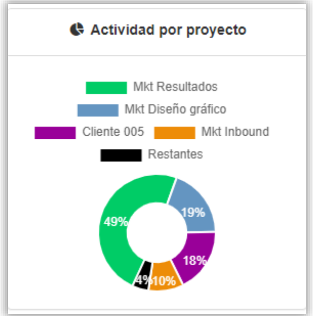
This panel provides a view similar to the project editor in the employee profile



The administrator can track the projects on a monthly basis, gaining an overall view through the colors assigned to each project.

Detailed information by hour can be obtained by clicking on the day you want to analyze. The information and the graph showing times and percentages per project are updated automatically.

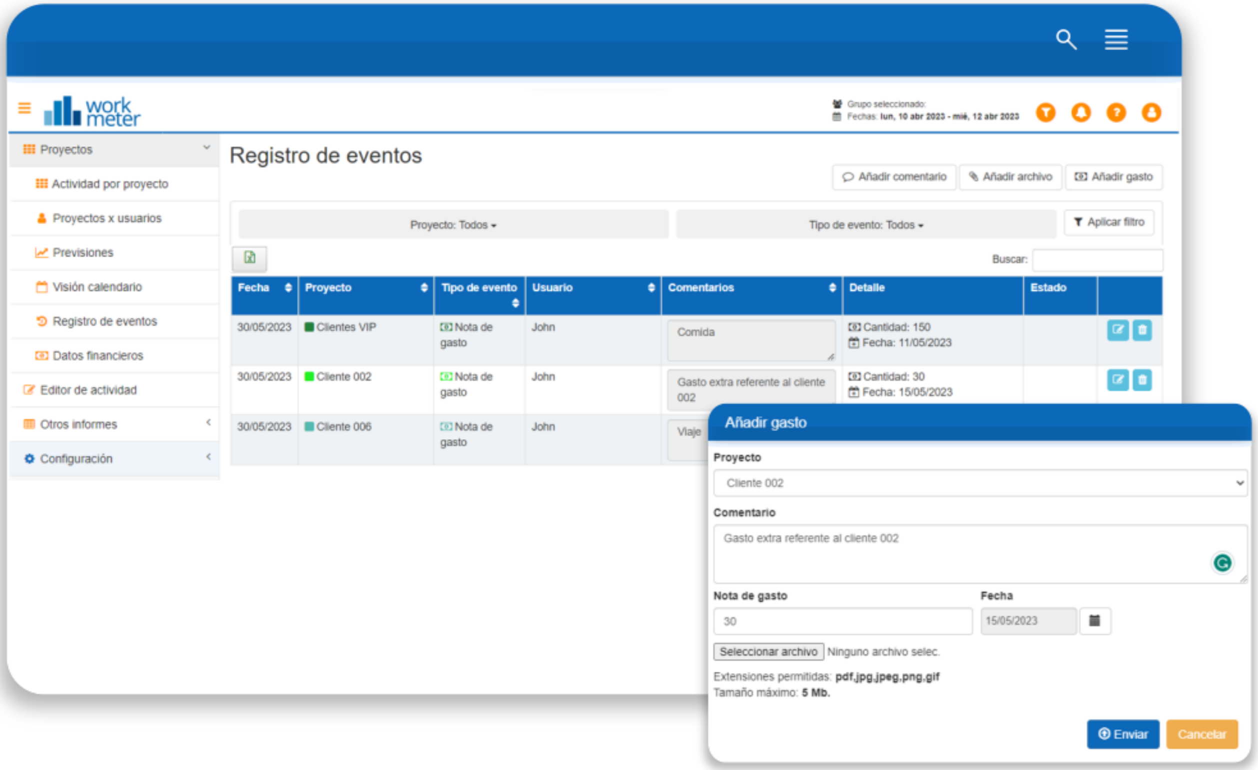




To view detailed information by group or employee, you must first filter the data using the filter.

Projects | Event log

Through this panel, you can view the comments, files, and expenses for all projects by employees and date.

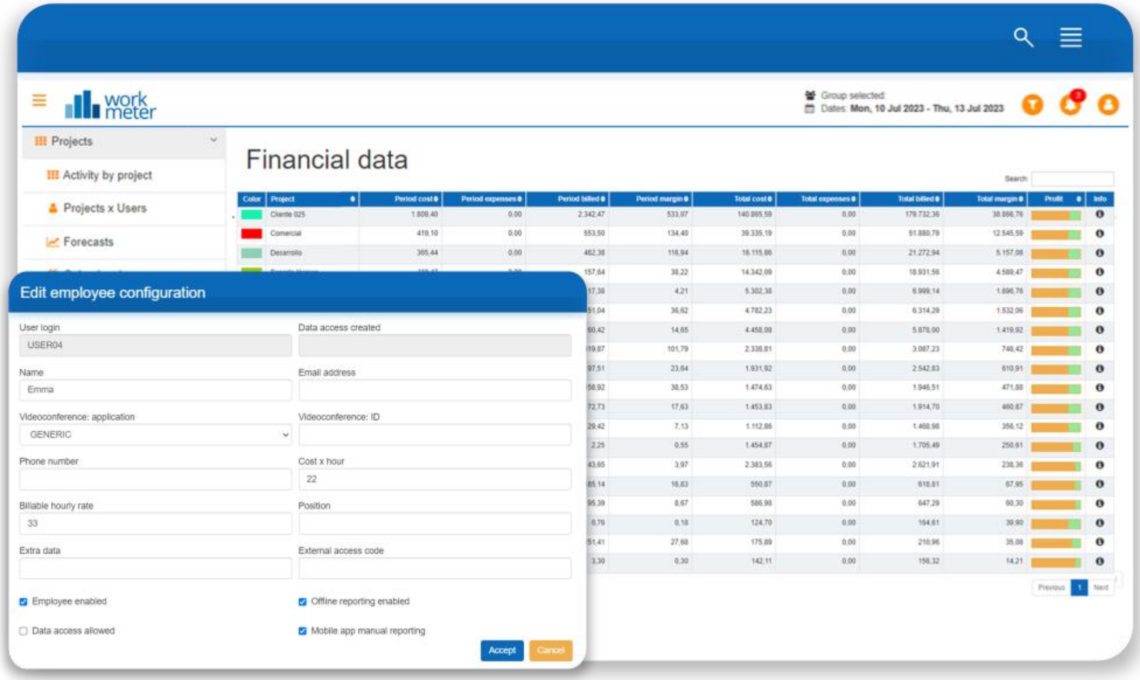


- Date
- Project
- Event type: You can choose to insert a comment, a file, or an expense
- User
- Comments
- Details: The specifications of each event are displayed

From the administrator profile, you can edit, delete, or request new records.

Projects | Financial data

In this panel, the monetary amounts related to costs, billing, expenses, and margins of the configured projects are displayed. This allows you to see the real-time profitability of all your projects. Specifically:



- **Project**: Name of the project
- **Cost for the period:** The monetary value or amount of money that each project costs in the selected date range. It is calculated based on the dedication hours each employee has spent on the project and the hourly cost previously configured for those employees.
- **Billing for the period**: The monetary value or amount of money earned or billed by each project in the selected date range. It can be calculated in two different ways: using the billable hourly rate of the employees or the project. If both fields are filled, the project's billable hourly rate will take precedence over the employees' rates.

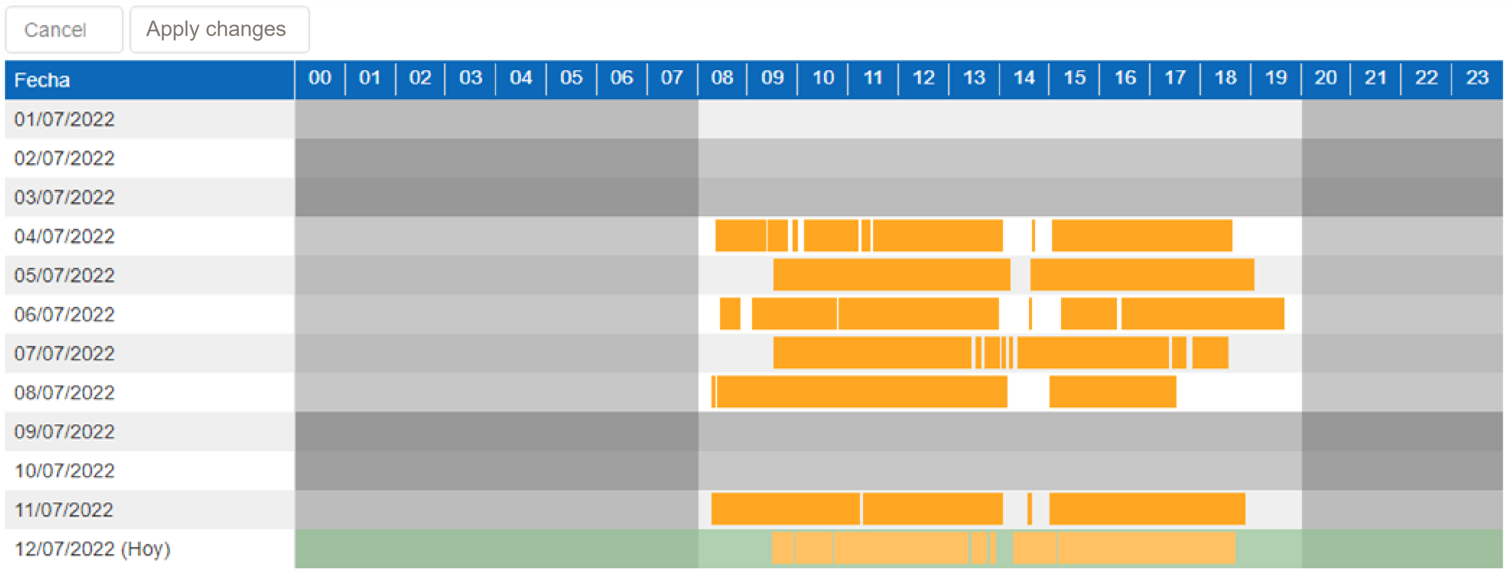
Projects | Financial data

- **Margin for the period:** The profit obtained from each project in the selected date range. It is calculated by subtracting the cost amount from the billing amount.
- **Total cost:** The monetary value or amount of money each project costs until its completion date.
- **Total expenses:** This column displays all the expenses entered through the *expense notes* added in the *event log*. If an administrator or group manager does not approve these expenses as valid, they will not appear here.
- **Total billing:** The monetary value or amount of money earned or billed for each project until its completion date.
- **Total margin:** The profit obtained from each project until its completion date. It is calculated by subtracting the total cost from the total billing amount.
- **Profit**: Visually represents the total cost (orange area) and the total margin (green area) of each project until its completion date.
- **Offer price**: The value configured in the project settings, referring to the price offered to the client.
- **Margin of the offer price**: The difference between the previously configured offer price and the total cost.

Activity editor | How it works

The activity editor is used to edit the activity periods automatically recorded for your employees. This allows employees to enter offline activity assigned to the selected project (on past days) with information that was not automatically captured by the tool. For example, adding offline activity times such as meetings, business visits, and any other offline activities carried out outside the PC.

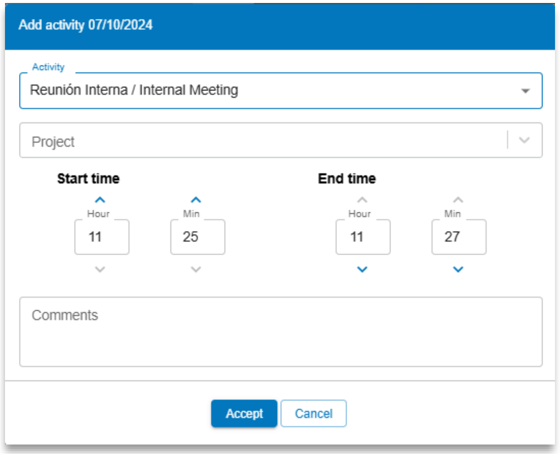
Employees request changes in the Activity Editor, which can be approved or denied by the group manager through notifications.



Activity editor | How to edit your activity

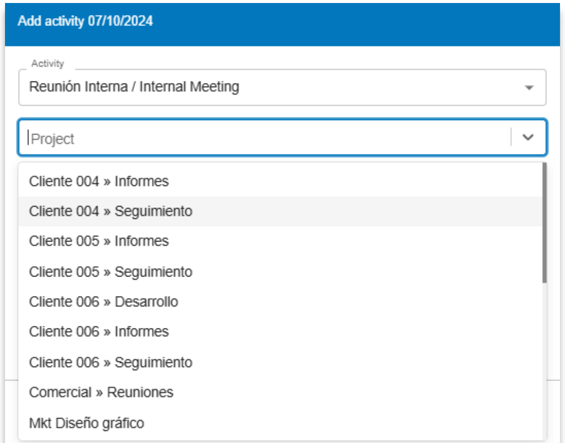
1. Select the date range you want to be displayed in the chart.

2. Click anywhere outside the orange shading, and the following window will appear:



3. Select the type of offline activity you want to add in the indicated time slots.

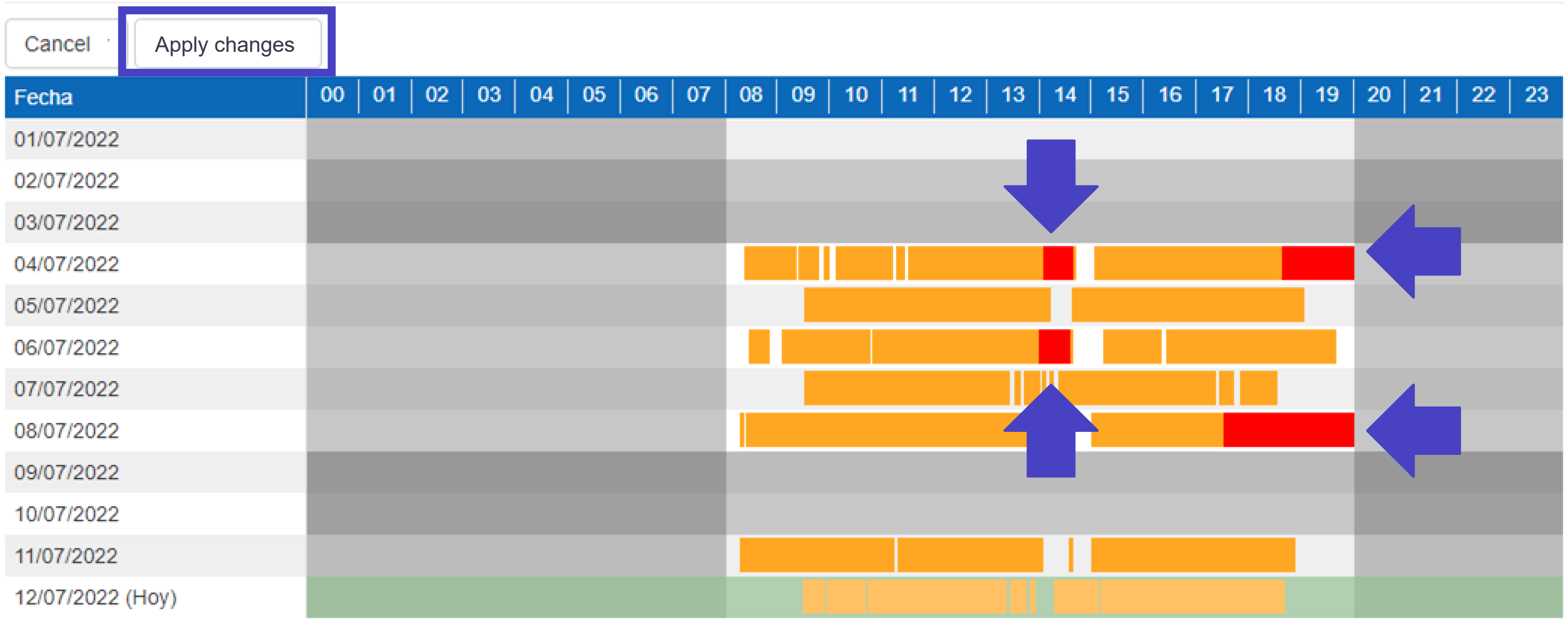
4. Select the project you want to assign the activity to and click the "Accept" button.



Activity editor | How to edit your activity

5. If you return to the Activity Editor screen, the changes made will be marked in **red** (pending approval). You can continue adding information to the panel for the other days you want to modify.

Once you have finished editing the data, click the "**Apply changes" button to save all the edited information**.

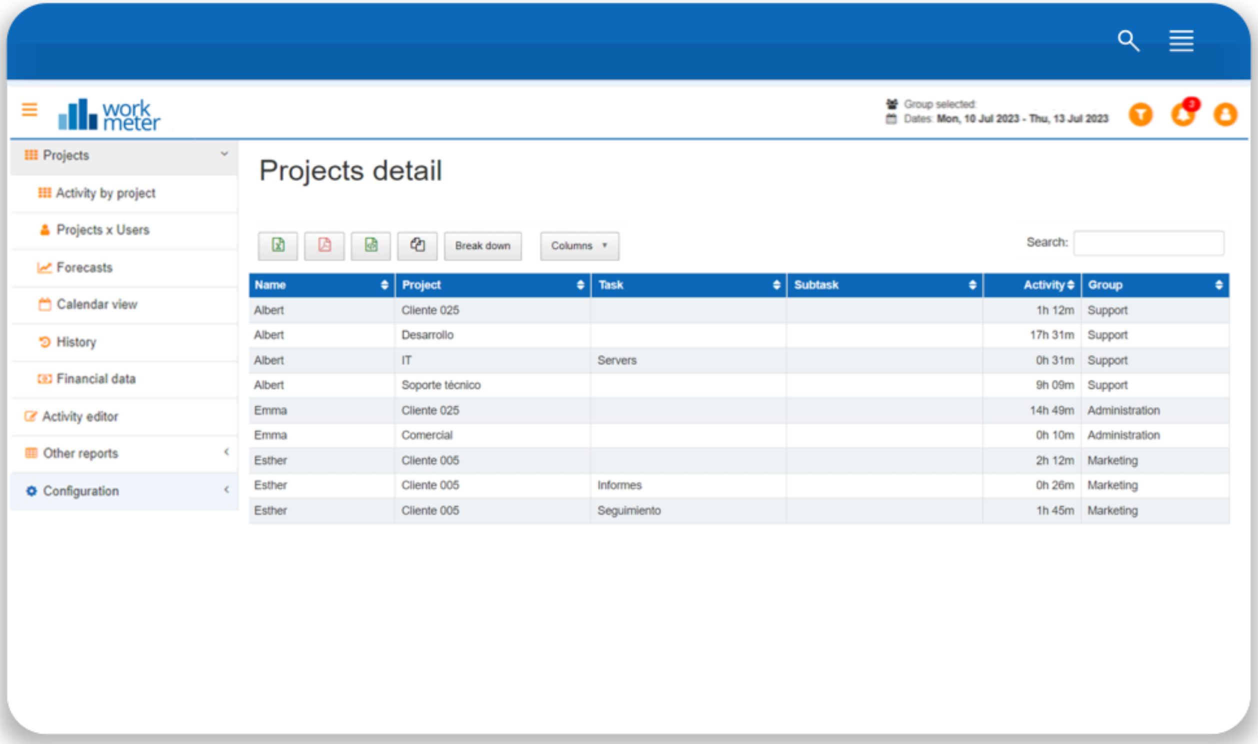


NOTES TO KEEP IN MIND:

- When applying changes, the modified days will be locked until the data is processed on the server (up to 24 hours). It is important to ensure that all modifications have been added before applying the changes.

- If activity times exceed the limits set by the manager, prior approval from the manager will be required.

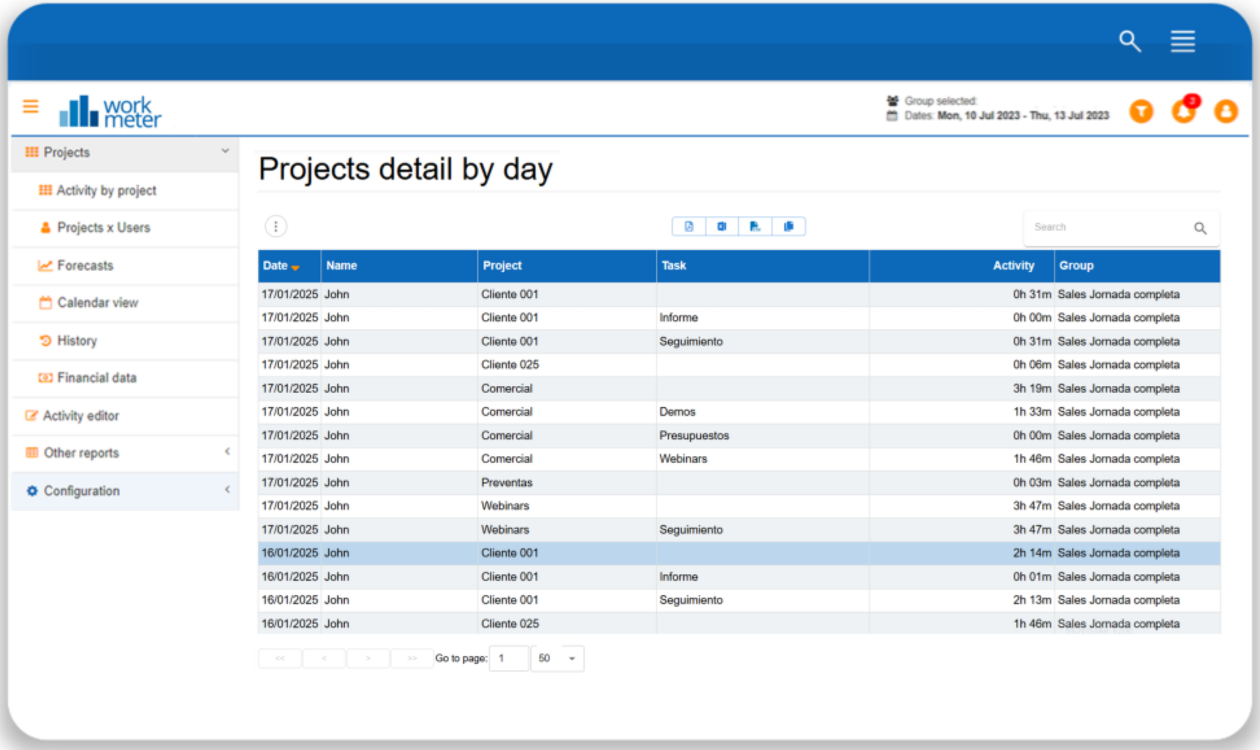
Other reports | Project details



This panel displays the total activity of the selected project for each employee.

- Employee name
- Project
- Assigned task (or subtasks) for each project
- Activity: Total time dedicated by the employee in the selected period
- Group: The group to which the employee belongs

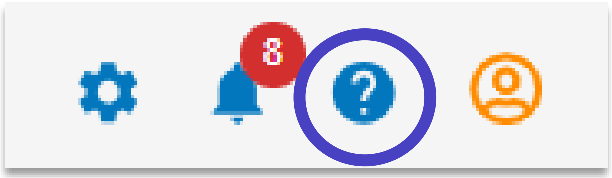
Other reports | Project details by day

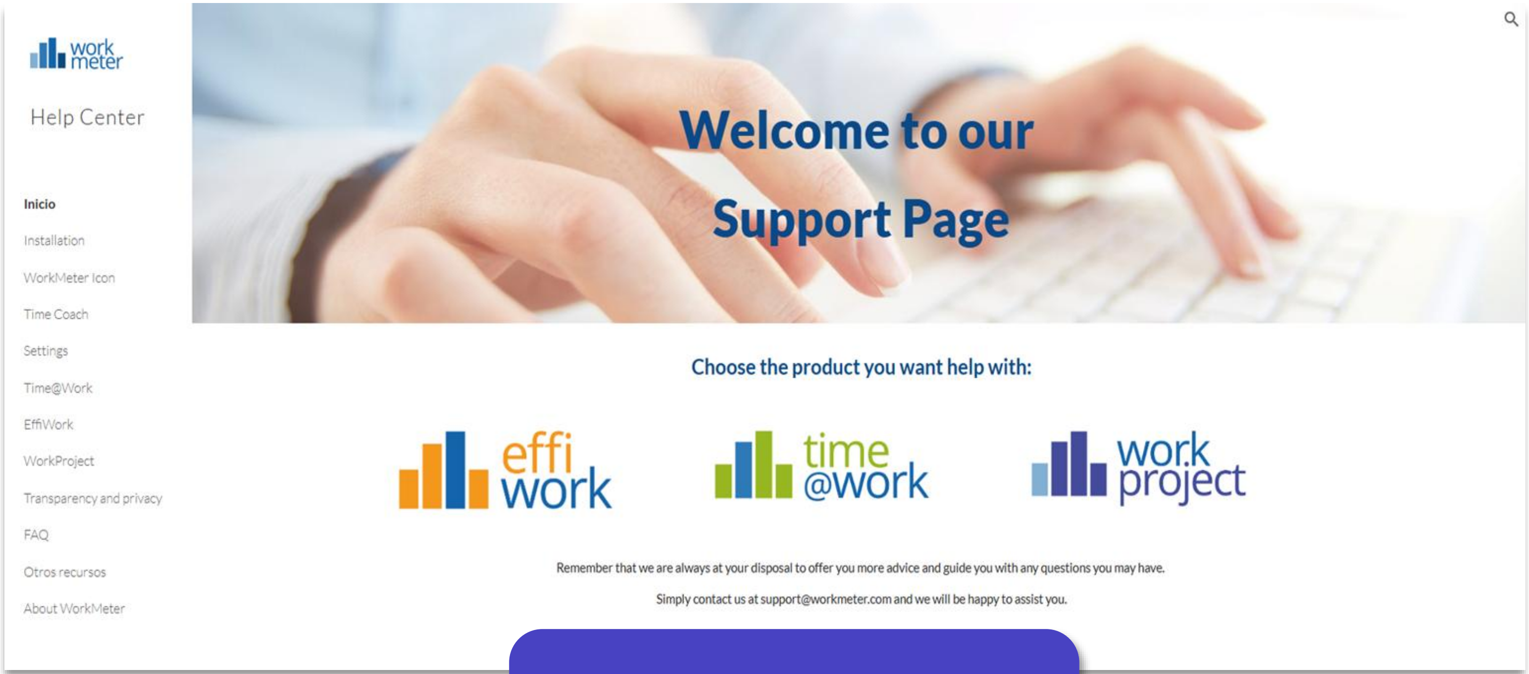


This panel displays the daily activity of the selected project:

- Date: Specific day for the selected date range
- Employee name
- Project
- Assigned task (or subtasks) for each project
- Activity (Time): Time dedicated to each project **per day**
- Group: The group to which the employee belongs

Projects | Help portal





ACCESS HELP PORTAL

Digital solutions for work time measurement