Traffic LIVE

User Guide V6.0

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PLEASE NOTE : This guide is current to V4.0 after which documentation was made more user visual and can be found on support.sohnar.com.

This guide has been revised as at 25 May 2012 to ensure removal of obsolete content.

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Traffic – An Introduction

Screen Overview

This section explains the common screen elements of Traffic and introduces the concept of Tab Based Browsing.

Top Bar

The Top bar of Traffic contains the ability to Search, and access to modules for which your system administrator has granted permission.

This manual covers all available modules. If a module, or feature, is disabled by your system administrator it will usually disappear. The permissions framework allows many features to be controlled. In most case these features will also disappear if they are not enabled, however in certain circumstances the feature will appear and be disabled. This approach is only used when removing the feature altogether is considered likely to cause user confusion.

Tip :Permissions are loaded when you log in. If your system administrator has changed your permissions you will need to log out and log in again for them to take effect.

Search

If you wish to locate a Job, Quote, Company or Employee simply commence typing in the search box. Below the will appear all matching items. The more you type the more filtered your search becomes.

The search looks for any text matching the search criteria. As such “and” will return matches like “Brand”, “David and Goliath”, “Andy” and so on.

Given space constraints the search only returns up to 5 matching entries in each category. If there are more than 5 (5+) will display after the category and clicking the “view all” link will show all matching entries.

Tip : The more you type into the search the less matching results you will have. “J” would return hundreds of items, “John” less and “John Smith” less still.

Once you see the item you require “click” on it and it will open in a new tab, or if you prefer you can use the keyboard up/down arrows and press enter.

Modules

To access a module "click" on it in the title bar. The module will open in a new tab.

Hovering over the module title will show the elements of that module. This feature allows you to directly select the element required speeding up navigation. You will only see features which you have permission to view.

Tab Bar

The Tab bar enables you to navigate between selected modules. If you wish to open a new module you can either “click” the relevant module and open it. This will clear your current view. Alternatively you can click on the “+” button to the right of the tab and open the required module in a new tab.

If for example you are working on a Quote and a call comes in you can open that clients CRM entry without needing to save or loose the Quote you were working on.

If a tab contains data that requires saving you are warned with a “*” in the top left hand corner of the tab.

As soon as an item is selected in a view then the tab updates to show the contents of the view – in the example above Job Number and Name. If the name is too large for the tab then hovering your mouse over the tab will show you full details.

Tip: Please consider that if you leave unsaved data in a tab and then close the program you may loose data. Make a habit of saving data as you leave a tab.

You may open as many tabs as the memory in your computer allows, but please bear in mind the more active tabs you have open the more system resources such as memory you will tie up. Make a habit of closing tabs that are no longer required.

Bottom Bar

The bottom bar is used to show system information such as logged in user, system notifications, To Do's - telling things you need to know and access to useful things like help and support and grabbing a copy of the screen.

Modules

Traffic is built from a number of modules. If a module is not shown on your system it will have been disabled by your system administrator. If you try to access a module you do not have (typically by linking from another module) you will receive a notification message.

My Traffic

The MyTraffic module shows information specific to the logged in user.

Its functions include showing you your schedule, letting you “Babble”, store and retrieve jobs based documents, allowing you to record time, submit expenses and manage ToDos and Milestones. If you are responsible for quoting and job management you can see details of the quotes and jobs you are responsible for and rapidly access those quotes / jobs in a single click. You can also see historic details of the time you have logged and set personal preferences.

Contacts

The Contacts module lets you find the Companies and people you do business with. You can search, export, see Organisation charts together with summaries of correspondence and statistics on jobs, quotes and the overall value of your client relationship.

Quotes

The Quotes module allows you to generate client quotes, either from scratch or using templates you can manage. Quotes comprise time charges, purchases and if you wish on the job expenses such as colour print outs and cabs.

You can produce client facing quote documentation in accordance with your own company style in any currency.

Quotes turn into jobs (or you can simply start a job without a quote). You can manage your quotes and see the size of your sales pipeline.

Jobs

The Jobs module allows you to set up and manage jobs. There is a quick reference dashboard and if you wish you can drill down into the financial details. Traffic lets you schedule the job, helping by suggesting the most suitable available resource. Traffic scheduling takes into account your working day, lunch breaks and so on.

You can bill jobs and send information to accounting packages and produce client facing schedules.

Manage Studio

The Manage Studio module contains a series of views that allow you to manage deadlines, and ensure your team are fully occupied. Views depict the information in various forms depending on if you are trying to sort out tomorrow or plan 3 months ahead.

Reporting

The Reporting module allows you to visualise information like you have never imagined. You can select the data you wish to see, manipulate and filter it and it will be graphically displayed in real time. Once you are done you can send the information to Excel for further analysis.

Admin

The Admin module allows System Administrators to manage users and company settings.

Please note: Sohnar can access your Admin module on request. Sohnar staff can log in as a user of your company, but only if you authorise this access in admin. When our staff are in your system they have no greater privileges than company System Administrators. The only additional privilege available to Sohnar are to turn your company off or the change your company name.

Common Usability Themes

Traffic has been designed to be simple and intuitive to use.

There are a number of common themes that make using the application simpler.

Sizing and Ordering Grid Data

Many areas of Traffic express data in a grid – just like Excel.

Grid components will usually allow :-

- Resizing the width of the grid by hovering over the gridline, click and hold and drag.

this is useful if long words have truncated

- Clicking on the header bar will usually sort the grid

- most grids have the option of Exporting to CSV

Some grids cannot be resized or sorted. This is usually when the grid is doing more than simply displaying data – for example it is showing imagery.

Changes to the appearance of a grid are only retained for the duration of your current browsing session. They are not retained as this may give rise to date being unexpectedly filtered which could be misleading.

Icons

Icons are used in Traffic if they improve the user experience.

The majority of features carry named buttons for ease of use.

The notes symbol can be clicked to open a notes window. If you enter notes the icon turns green.

Refresh will refresh the content of the screen

Glossary of Terms

Project

A project is a “container” that holds together related Quotes and Jobs. All Quotes and Jobs must be within a Project

Quote

A quote is a list of tasks, purchases and expenses that enable you to create a price and work plan. You can transition a Quote into a Job – or simply start a job from scratch.

Job

A job is a work plan comprising Stage, Tasks, Milestones, Purchases and Expenses. The job drives the workflow in Traffic. Jobs are often created from Quotes but you can create a job directly. Jobs are related to Quotes but can have a totally different structure – what you sell to your client is hence independent of the internal workflow to deliver what you have sold.

Stage

A stage is an optional “container” that holds tasks together in logical groups within a job.

Task

Tasks are things that you would like to be done. All tasks have hours allocated to them and a charge out rate. You can choose to bill tasks either by what should happen – the estimate – or what actually took place.

Allocation

You may ask one or more people to perform a task. You can allocate them as many hours as you wish. This is called an allocation.

Interval

An allocation is made up of Intervals. For example an 8 hour allocation could have 3 intervals , 9-12 on Monday, 2-5 on Tuesday and 3-5 on Friday. You could allocate someone 8 hours but only schedule say 5 and schedule the rest later.

Intervals by default take account of weekends, start of working day, end of working day, public holidays, company away days and lunch times. You can over ride this feature and schedule people outside of normal working hours if you wish.

We will revisit Intervals later in the guide. These give Traffic the power to schedule work to anyone at any time to reflect real life workflows rather than assuming that someone will spend 10 continual and uninterrupted hours performing a task. It also allows you to schedule additional resource against over running tasks and to move parts of tasks to other people.

Getting Started – Technical Specifications

Traffic is a cross platform application running on PC and MAC operating systems.

Linux is not supported.

The technical specification given here are **minimums** for the system to run. They are not recommended specifications. The recommended specification for any given user can only be determined by understanding the suite of programs that the system will be running and guidance on this topic needs to be taken from your IT reseller. A system used for internet browsing can have a lower specification than a system running the entire Adobe Creative Suite.

Traffic runs on a platform called Air by Adobe. Air is a desktop version of the Adobe Flash Player. Air allows Traffic to store the program and some data locally meaning you do not have to wait for information across the internet.

Air is packaged with the Adobe Creative Suite and as such there is a good chance that it will already be on your computer.

The up to date technical specifications to Run Air 3.0 and Traffic can be found here.

http://www.adobe.com/products/air/systemreqs/

Traffic is optimised for a 1280 by 800 screen resolution which ensures best use of screen real estate for the vast majority of recently produced computer equipment. Resolutions below this will work but the user will need to scroll. If you are displaying Traffic on an older “Plasma” type screen please consider it may not support this resolution. For schedulers we recommend a 23 inch screen or above as it will give them an unrivalled scheduling view. The greater screen resolution available the more screen real estate Traffic will use.

Please note that Air 3.0 / Traffic **will not** run on Windows 2000 or Power PC Macs. Power PCs were discontinued by Apple progressively between mid 2005 and mid 2006. Windows 2000 was discontinued in October 2001 and all support for the product has now been withdrawn by Microsoft.

Getting Adobe Air

If you do not have Air on you computer you will need to download and install it. You will need appropriate permissions to install software on your machine. If in doubt please ask your system administrator.

You can download Adobe Air here

http://get.adobe.com/air/

The download will take a few moments and Air will then self install.

Downloading the Application

You will receive an email upon sign up that will give a link for downloading Traffic.

Once downloaded your computer will recognise the files as an AIR application. Run that application and it will self install and run. You will then see the Log In screen. Please answer YES to any questions the installer may ask. The application is digitally signed for your protection and Sohnar Ltd will be shown as author.

Once installed the application will keep itself up to date. There are two types of update, recommended and mandatory. You will need administration privileges to install updates.

Recommended updates will be minor fixes and enhancements. We recommend you update, but if time pressures dictate otherwise you can delay. Mandatory updates occur when the way the application communicates with the server has changed. These will mostly relate to new features.

You may install the application on as many machines as you choose. Your laptop, home computer and so on. On login the application will pick up the most up to date information from the server and you can continue working. You may only login from one machine, and two users logged into one account will result in an error. Account sharing is not permitted under the terms of the licence agreement. Certain settings (for example your preferred directories for saving data) are stored on your local machine.

Tip :If you cannot login check you have an internet connection. If your computer has internet access but Traffic does not you should try restarting the machine in the first instance.

If other users can access the system but you cannot then a firewall program or similar maybe blocking the connection. You will need to consult your local IT support.

Tip : If you cannot login to Traffic Scheduled Maintenance maybe taking place. Scheduled Maintenance will always be notified on the Traffic welcome screen.

Setting up your machine

If you print HTML (as opposed to PDF) documents in Traffic LIVE you will need to modify your browser print settings.

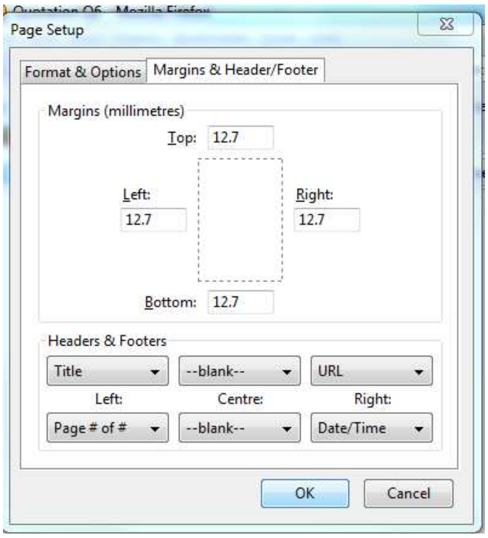
Turning off Browser Generated Headers / Footers & Printing Colours

Depending on your browser settings, when you print you may find that things such as the URL of the page you are looking at, the date and time etc. maybe added to the PDF.

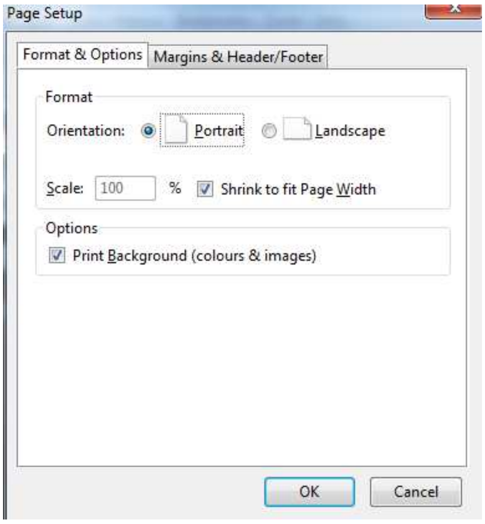
Additionally if your design includes coloured fonts or fill colours (table headers for example) you will need to enable “Print Background Colours and Images” or the browser will default to black fonts.

These settings can simply be changed

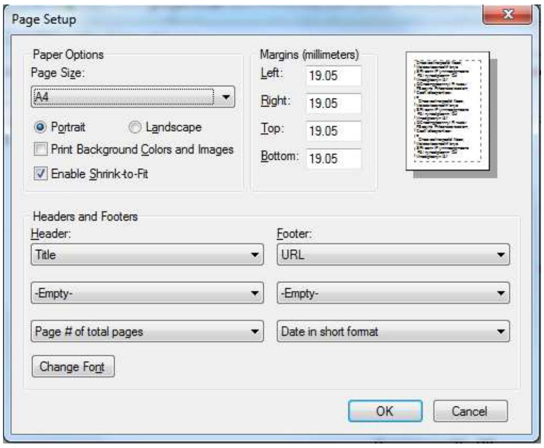
- Firefox
  - File / Page Setup
  - Select Margins / Headers and Footers
  - Change all 6 options to “blank”



  - Select Format and options
  - Check the Check the box “Print Background (colours and images)



- Explorer
    - o Click the expanding panel to the right of the printer icon
    - o Select “Page Setup”
    - o Change all options to “Empty”
    - o Check the box “Print Background Colours and Images



Internet Connectivity

Traffic is “Software as a Service”. This means that all data is stored on secure servers hosted by Sohnar – the company behind Traffic. To access Traffic you must be connected to the internet.

Traffic will tolerate short internet outages, and the application “cashes” (stores locally) some of your data so that you can navigate, search etc. without delay. This makes the application tolerant of slow internet connection, mobile dongles etc. The slower the connection however the slower the recall of data from the server.

Traffic is in regular communication with the server to ensure you always have up to date information showing on your screen. For example if another user adds a job you will see it appear in your jobs list.

If the internet connection is interrupted this update process cannot function. If Traffic has not been in contact with the server for 20 minutes you will be disconnected for security reasons. Any unsaved data will be lost. Please bear in mind that “hibernating” a laptop will result in your session expiring and you will receive an error message if you then try and use the system.

Traffic communicates over Port 80 and Port 443. These are standard ports for HTTP and HTTPS traffic (ie browsing normal and secure web sites). It is almost inconceivable that these ports will be blocked.

Tip : Traffic LIVE runs multiple application servers. The application server that you are allocated depends upon your “IP” address. Your IP address is like you internet phone number. If your IP address changes during your session then there is a good chance that you will be routed to another server that will not recognise you. Changing IP address could be

(a) you have a dynamic IP address on your internet connection – if it were to drop out and reconnect then if could change

(b) a mobile dongle dropping out and reconnecting could do the same

(c) if your company uses load balancing to route external traffic to multiple ISPs. If this is the case they will need to add rules to ensure that traffic routed to api.sohnar.com is no load balanced

(d) your laptop “hunts” wifi connections from different providers.

Error Messages

There are two type of error messages Traffic can produce, Errors and Alerts. In general Alerts can be “fixed” by user action, Errors cannot.

Errors

Errors are mostly caused by an unexpected event occurring in the code. Depending on the nature of the error the application maybe forced to close.

- An error has occurred, please tell us what happened so we can investigate. ,
- An error has occurred, please tell us what happened so we can investigate. The application will now close.

A dialogue box will allow you to tell us what was happening when this occurred and will send a screen shot of your Traffic LIVE view (not your entire) screen to Sohnar where a support ticket will be automatically raised in your name.

Please make your details of what you were doing as descriptive as possible to enable us to recreate and correct the issue.

We publish known issues on support.sohnar.com. A known issue is something that a user following a “normal” path through the application may come across with some regularity.

If you “follow” this forum you will be notified of any known issues.

Alert

Alerts are generally caused by user action or something external to the Traffic LIVE system such as internet connection. Some alerts result in the application closing. Alert messages are detailed below. Most are self explanatory . A few have additional notes.

- Your Traffic LIVE session has expired. You will need to log in again. The most common cause of this error is hibernating your computer Unable to contact the server, please check your internet connection and try again.

- You do not have permission to access this area. Talk to your administrator nicely if you need access.

- Unable to contact the server, please check your internet connection and try again.

- Your data was not sent correctly. Please retry.

- Your account has been locked by too many failed logins, or by an Administrator. Please contact your Administrator.

- Your account is disabled, please contact your Administrator.

- You have entered an invalid username / password. Please try again.

- Since you loaded this page data has been modified by another user. Your changes cannot be saved. Please refresh or reload the page and try again.

  If you are modifying the same job in several windows or other users are modifying data you may see this error.

- Sorry, this item cannot be deleted because it is connected to other items that must be deleted first (eg a job may have time on it). Please correct and retry.

  Items can only be deleted if they are not in use elsewhere. If a job has tasks, tasks have time, tasks are scheduled and so on. In admin if a chargeband is in use by a job etc.

- E-Mail addresses must be unique and this email address is already in use. Either arrange for the old username to be deleted or choose an alternative email address. The server is unable to action this request.

- The data just sent is of an unexpected format. Please review your input and retry

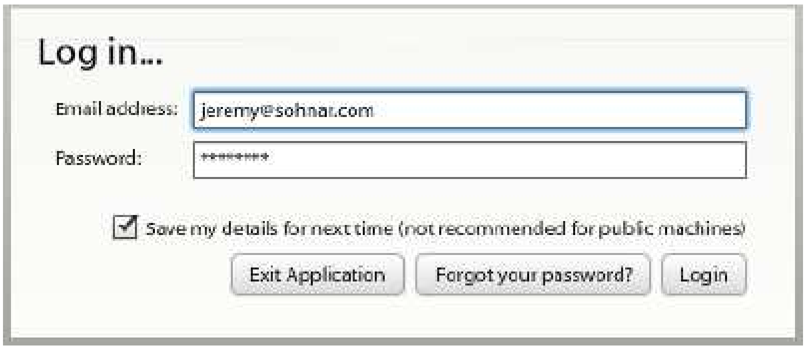
  We validate every input before sending it to the server. If we have made a mistake, or you have entered something we did not envisage you will see this error. Please review you input and seek to understand what has happened. Special characters, letters in date fields etc?

- The server cannot action your request. Reasons include (a) your machine hibernating (b) your username used twice (c)a dropped internet connection restored with a different IP address (d) insufficient permissions.

- There is no account associated with the email address you provided.
- This task is marked as complete. Time cannot be edited on a completed task.
- This time entry has been signed off and cannot be edited.
- Cannot issue an Invoice with no line items!
- There was a problem reading or writing from a file. Please make sure the file is not in use

  Are you importing or exporting to a file that is already open on your computer?

Logging In



To log in Open the Application by clicking on the desktop Icon.

The username / password dialogue will show.

Enter your Username and Password and click LOGIN. Your username is your email address and your password will either be a single use password supplied by Traffic or your chosen password.

Passwords must be 8 characters or more and contain one capital, one lowercase and one number.

As long as you have entered the correct password the system will log you in.

On login you will see “Service Messages” from Sohnar. These will advise of the status of the system, any known performance issues and any planned system outages.

Please note if maintenance is scheduled, then at the allotted time all users will be logged out. Unsaved data will be lost.

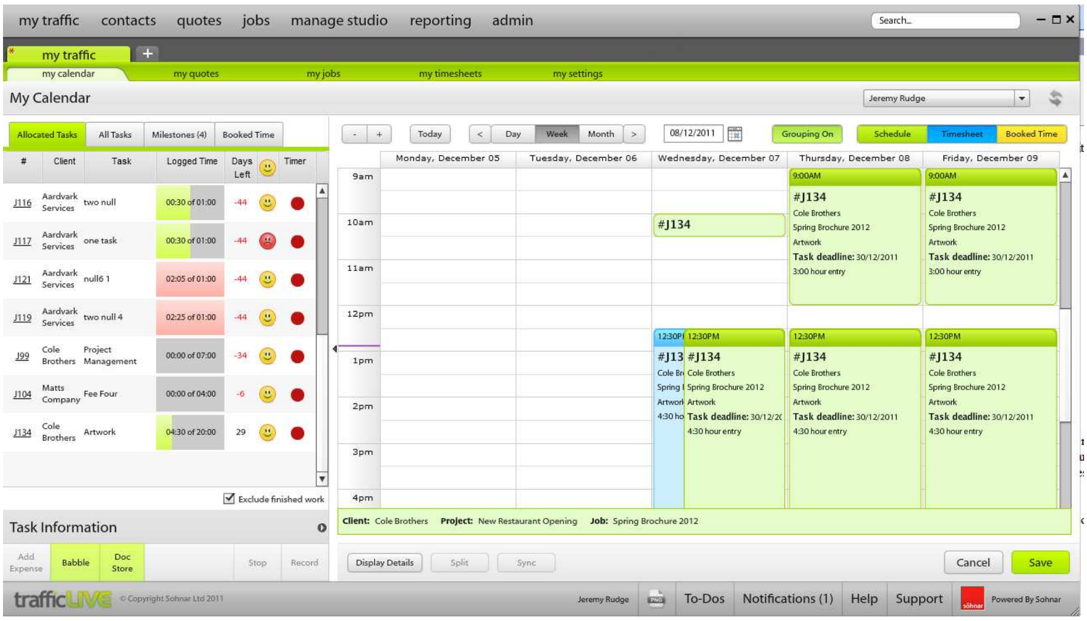
If you have forgotten your password follow the Forgotten Password link. You will then be mailed a temporary password.

If you have exceeded the number of password attempts or your account has been suspended for any other reason please contact your System Administrator who can reissue your password / unlock your account. **Sohnar support are unable to unlock accounts as we are unable to confirm individual users identities.**

Tip :The time taken to login will vary. Traffic holds a significant amount of data locally to guarantee rapid performance. This data is synchronised at login and then kept upto date during the day.

Tip :If system maintenance is scheduled you must ensure you save your data and logout before system maintenance commences.

My Traffic



My Traffic presents you with information centred on the currently logged in user – you!

My Traffic comprises a number of elements. If you cannot see some of these then your permissions will have been restricted by your system administrator.

- My Calendar
  - Shows your workflow and allows you to record time and expenses, “babble” and retrieve / store documents.
- My Quotes
  - Shows quotes that you are responsible for, allowing you to manage you client pipeline
- My Jobs

  - Shows jobs you are responsible for, allowing you to identify progress / issues as they happen

- My TimeSheets
  - Shows your historic times sheets

- My Settings
  - Allows you to set things personal to you like your email signature, calendar synchronisation options and where you save files.

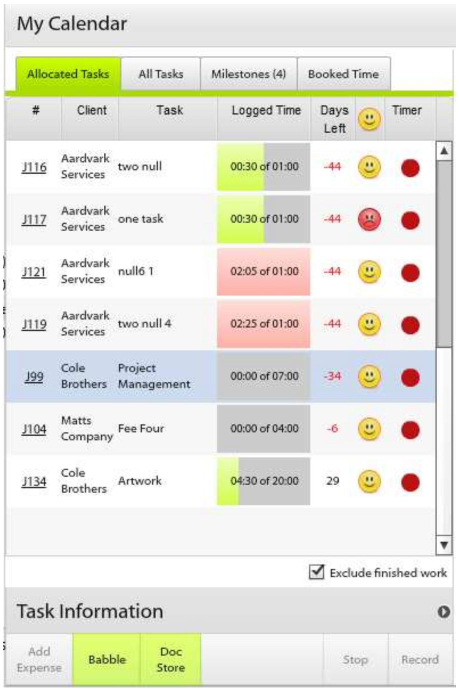
My Calendar

My Calendar is at the heart of Traffic and lets you manage all of your workflow in a simple easy to use graphical view. If you have permissions you can also re-schedule your own work, within the confines of work deadlines, “babble” and store / retrieve documents.

Screen Overview

The My Calendar Screen is made up of two main areas

Left Panel



The left hand panel allows you to see work allocated to you and to interact with the right hand pane by dragging items onto your calendar.

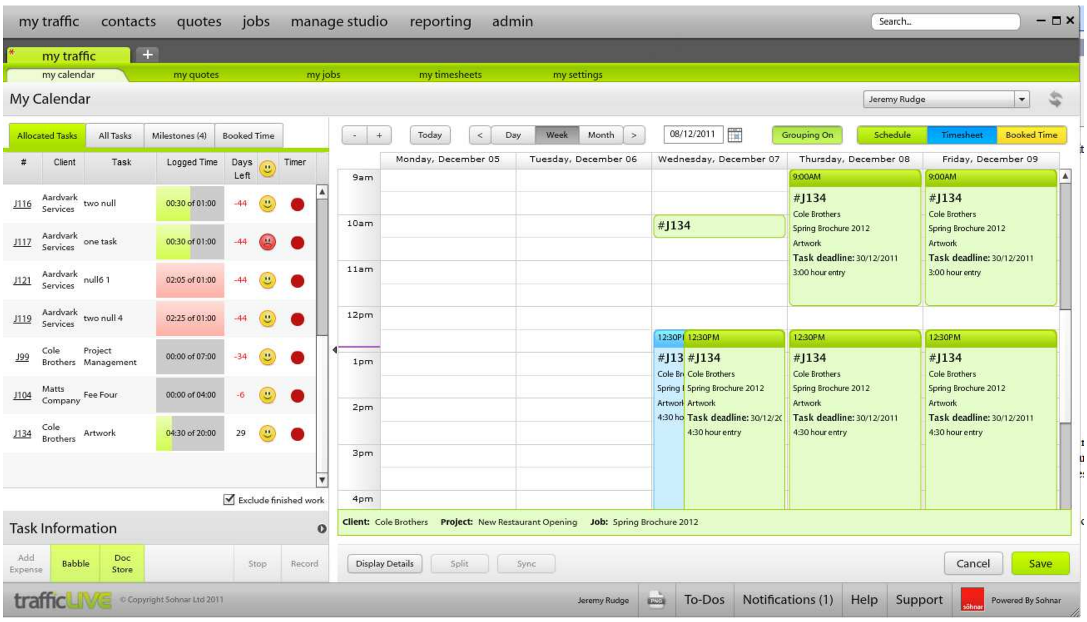
The bottom of the left panel expands to show additional information about selected tasks.

You can close the left panel by clicking the “<” on the right hand side of the bar. You can reopen it by clicking “>” on the left hand edge of the screen.

You can resize the left panel by clicking and holding on its left hand boundary. The panel has a maximum size beyond which it will not expand to allow the calendar sufficient space.

At the bottom of the screen you can open expenses, “babble” and the document store. This buttons are green when enabled and grey if not available either due to your permissions settings or a valid selection elsewhere not being made.

Main Panel



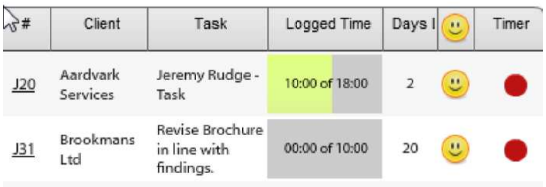
The main panel shows

- work scheduled to you
- your time sheets
- bookings such as meetings or tentative work allocations.

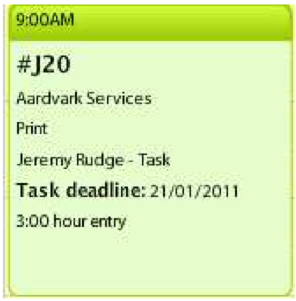
Double clicking on scheduled work will add a time entry.

Viewing Work Scheduled To You

You can view work schedule to you either graphically on the calendar or as a list.



Scheduled work is shown in Green on the Calendar. These entries can be manipulated by the user subject to permissions. This is covered in the section “Moving Scheduled Work”.



Double clicking scheduled work will create a time entry. This is covered in more details in the section “Adding Time”

The Left Pane tab – Allocated Tasks – shows all tasks allocated to you. The default order is “Days Left” so you will see the most due / overdue task at the top of the list.

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The work shown on the list is all work allocated to you with an "Accepted Status" * that has not been marked as complete and where the job is in an active state (eg not closed).

* Accepted Status. The system allows work to exist in an Accepted or Pending State. The pending state is invisible to the end user and is used by schedulers to manipulate workflow, deal with clashes etc. without the My Traffic calendars showing a series of unconfirmed entries. If you are expecting work to show and it does not you may want to ask whoever schedules your work to check it is in an accepted state!

Hovering over a work item will display more information.

Clicking on any work item will select it and allow you to :-

- click INFO at the bottom of the screen to see more information about the task.
- click "Add Expense" to add an expense
- click "Babble" to babble on a task
- click "Doc Store" to save and retrieve files relevant to the task / job you are working on
- click "Record" to start a work timer. This button will change to "Pause" once clicked allowing you to pause the timer. Clicking on the timer itself will Stop the time and add a time entry.

If you click and hold you will be able to "Drag" the entry onto the calendar, which will add a time entry.

Time entries are covered in more detail in the following section.

Happy Rating

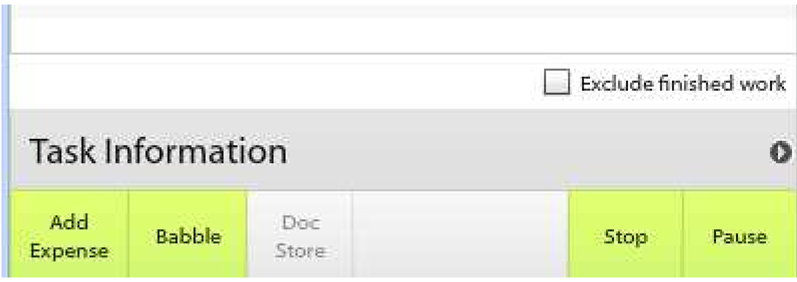
All Allocated work has a status – we call this a Happy Rating ☺

- Happy (yellow smiley face)
- Sad (red sad face)
- Complete (green tick)

If once you look at a task and take into account the deadline date and hours feel that the task cannot be accomplished, make click the face and change it to Unhappy. The unhappy task will be flagged elsewhere in Traffic so that it can be dealt with.

Once adjustments have been made and you feel the work can be completed in time, click the face once again and change it back to Happy.

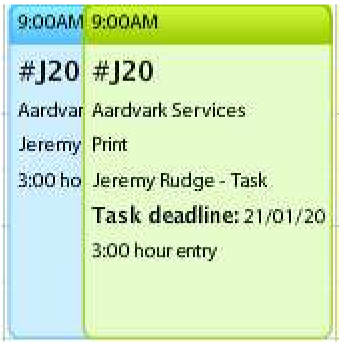
Once work is complete change the face to Green. The task will remain on your work list until the project owner agrees the work is complete, or the job is closed, unless the “Exclude Finished Work” checkbox is enabled which filters complete tasks from the view.


Exclude finished work
Task Information
Add Expense
Babble
Doc Store
Stop
Pause

Adding Time

You must click SAVE for time entries to be logged into Traffic

All time entries show on the Calendar in Blue.



There are four ways of adding time in Traffic.

- Double Clicking on a Scheduled (Green) Work calendar entry

  This will create a time entry of the same duration as the scheduled work item.

- "Dragging" a task form the "Allocated Task" tab onto the calendar

  This will create an time entry equal to the default time duration - 30 minutes.

- Using the timer

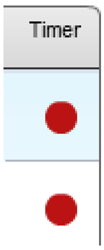
  Timers can be set on any Allocated Task. You may have as many timers running as your conscience allows!

- Selecting a task form the “All Task” tab and dragging it onto the calendar

  This will create a default time entry as above.

You must click “Save” to save time entries to Traffic.

Starting Job Timers



- Click on the red “Record” button on the right hand side of the scheduled work item
- Click “Record” at the bottom of the screen

The timer will start.

A timer can be paused by selecting the clicking on the scheduled work item and clicking Pause at the bottom of the screen

Timers can be stopped by clicking on the timer

As soon as a timer is stopped a time entry of the appropriate length (subject to the default minimum time entry) will be entered into the calendar with its end time as the current date / time.

Tip :If you are working at the weekend you will not see your time entries unless you show the weekends by selecting “Today” or entering “Month” view and double clicking on the weekend day concerned.

Changing Time Entries

Time entries are entered with the default values detailed above.

You are free to move time entries unless they have been signed off. Signed off entries turn grey.

You are unable to sign off your own time entries. Once signed off you will be unable to move or edit an entry. If amendment is required then you will need to ask someone with appropriate permissions to “un sign off” the entry which will allow it to be edited once again.

To move a time entry simply place your mouse on it and click-and-hold. You can then drag it anywhere you choose.

If you want to make an entry bigger or smaller, simply place your mouse over the start or end of the entry, click-and-hold and stretch or shrink as required.

The maximum length of a time entry is 23:59, and the minimum 5 minutes. Please note that entries shorter than 15 minutes will probably show as no more than a blue smudge! To see detail you can either

- hover your mouse and you will see the entry detail or
- Zoom the calendar in using the + / - buttons in the top left of the calendar

When time is added / selected a blue information bar at the bottom of the screen will confirm the start / end time (you can edit this if you choose), allow you to mark time as Non-Billable and enter time sheet comments.

You should agree internally how you use the “Non Billable” feature.

Jobs can be set up as “In House” and hence be non-billable by default. Non-billable work would typically be things like re-works or perhaps small favours for existing clients.

You must click “Save” to save time entry changes to Traffic.

Deleting Time

To Delete a time entry click on it and either press “delete” on your keyboard or the delete button in the bottom right hand side of the screen. You cannot delete time that has been signed off. Deleting time from a closed job will result in an error message.

You must click “Save” to save time entry deletions to Traffic.

Moving Scheduled Work

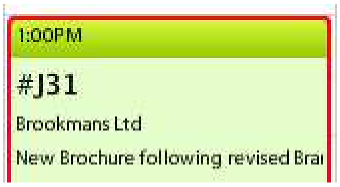
This feature can be enabled or disabled by your systems administrator

You must click "Save" to save schedule changes to Traffic

As a user you are able to manipulate your scheduled work to better reflect reality and changing requirements.

You are free to move most work but

- you are unable to move any part of a task beyond its deadline date
- If any part of a task has been moved beyond its deadline date by a scheduler then the whole task will be highlighted with a red ring and you will be unable to move it – it is already late so the whole task comes under the control of the scheduler.



- You are unable to move any part of a task to commence before the end date of a task upon which it is dependant. The task will be highlighted with a purple ring.

- If any part of a task breaches a dependency (most likely following the intervention of a scheduler) it will be highlighted with a Purple ring and you will be unable to move it.

Moving Work

Work is moved by clicking on it, holding your mouse key down and dragging the work to its new location.

There are a number of rules and modes that this can work in, ensuring that the system is doing the work and not you!

At the top of the screen there is a mode button which can be toggled between “Grouping On” and “Grouping Off”.

Tip : If you sync your calendar to Google, Outlook etc. and have it showing allocated work, your work allocations will show in your calendar. If you move them in your calendar they will move back the next time you sync. Moving work is subject to complex rules that cannot be replicated in a calendar program.

Some Theory

Before continuing a little bit of theory. Please bear with us for a moment and read on. If you understand this concept detailed below you will get so much more from the system!

Work Allocated to you in Traffic is constructed of a number of Intervals. When the system schedules by default it allows for the start of day, the end of day, lunch time, weekends, public holidays and company away days.

As such a piece of work allocated to you for say a 10 hour piece of work starting at 11am on a Monday – and assuming a 9 – 5 working day with an hour for lunch at noon would be allocated to you as follows :-

Monday	11am - 12 noon	1 Hour
Monday	1pm – 5pm	4 hours
Tuesday	9am – 12 noon	3 hours
Tuesday	1pm – 3pm	2 hours
		10 Hours

We call each of these time chunks an interval. Intervals need not be sequential, so you can have people working a few hours here and a few hours there.

A set of intervals allocated to a person for a specific task is called an Allocation.

Each task may have several people assigned to it, in which case it will comprise multiple allocations.

The structure is hence as follows

Project
- **Job**
  - **Stage** (optional)
    - **Task**
      - **Allocation** (a collection of intervals assigned to someone)
        - **Interval** (a unit of time)

Grouping On

If you move a piece of work in “Grouping On” mode you can only grab and move the First or Last Interval. Dropping the piece of work in a new location will then apply the same working hours rules as above and the whole piece of work will be kept together as one continuous piece automatically.

Tip : In Grouping on mode the whole task is moved and the rules on working time are observed. You cannot move work outside of the system defined working times.

Grouping Off

Turning Grouping Off allows you more direct control. In essence the learner wheels are removed!

With Grouping Off you can

- Move Intervals independently of each other
- Move intervals into non-working time – lunch times and evenings for example
- Split Intervals into small components to fit your day.

Tip: You can choose your personal default for grouping on / off in My Settings.

Moving Intervals

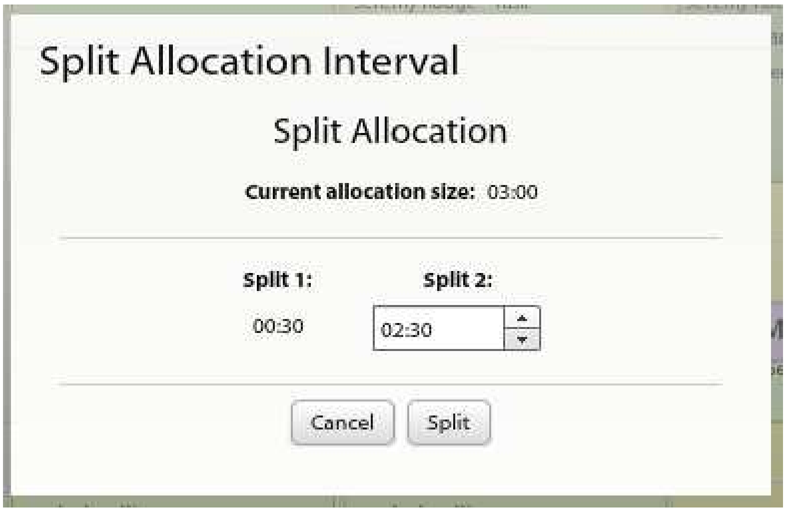
Select any item scheduled item and you can drag it anywhere you choose. The other intervals will not move.

For example you could be staying late and hence move some scheduled work from the following day into this evening.

Splitting Intervals

Lets say you wanted to work your lunch hour. Locate an Interval. Click on It.

At the bottom of the screen the “Split” button will be visible. Click it.



The split pane will appear. You can then split the Interval into two parts. Select the size of the interval and click Split.

The Interval will split in two and you can then drag either part wherever you choose.

Putting it all back together again!

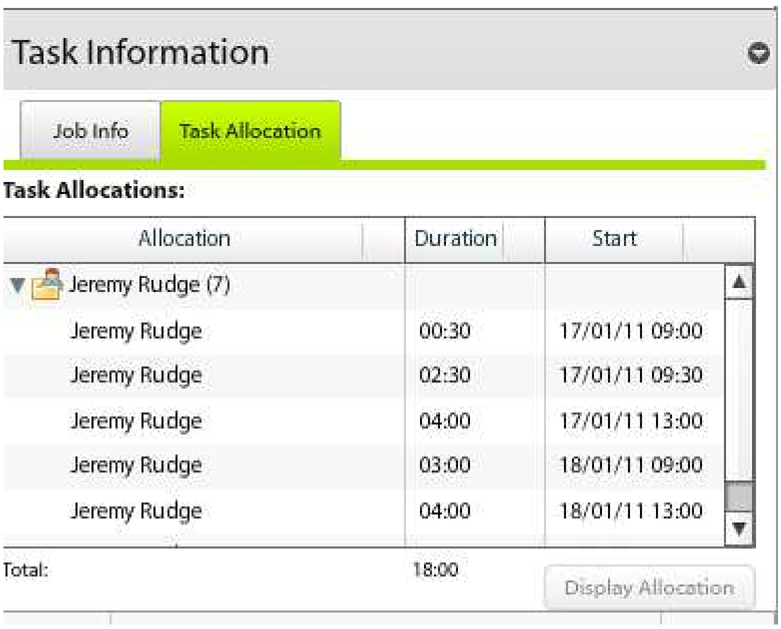
By splitting and moving work you can create your own masterpiece of scheduling. If your masterpiece turns out to be a little wide of the mark simply select “Grouping On”, drag the first Interval and the whole job will be rebuilt in sequential order.

What have I done?

The ability to split and move is clever, however there is a risk particularly if you make active use of this facility that you may loose track of what is going on.

Help is at hand.

Select an Interval and click “Display Details”. The task window will appear. Select the Display Allocation tab and you will see a list of all the Job Intervals – hence showing you what is going on.

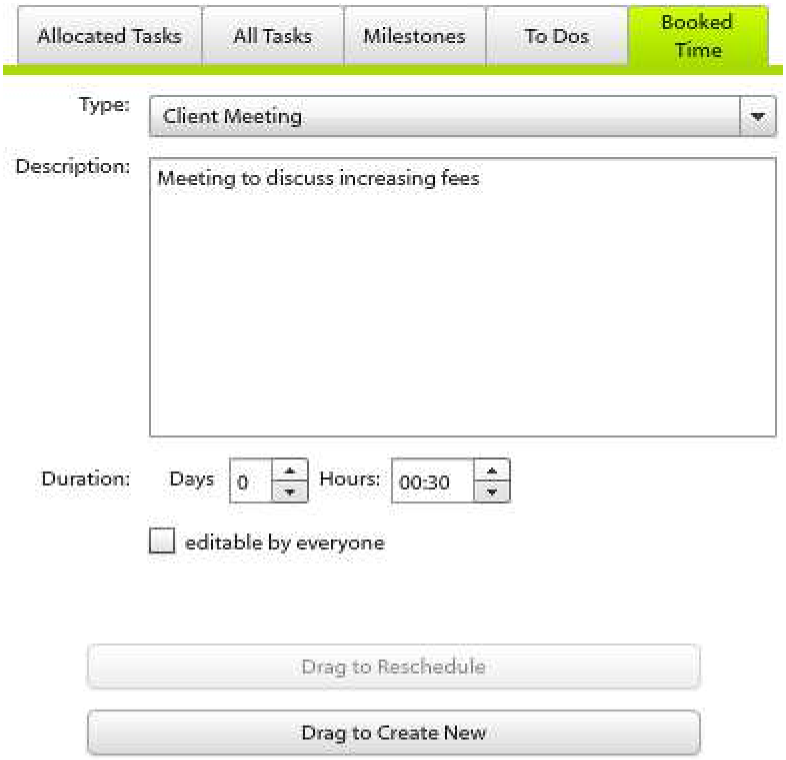


By selecting and item and clicking “Display Allocation” Traffic will take you to the appropriate scehdule entry.

Tip :If you get lost, either put Traffic into Grouping On Mode and regroup, or click Display Details and see where each item is allocated.

Booking Holidays and Meetings

Click on the Booked Time tab on the left pane.



- Select the reason for booking time. The list of available time booking options is set by your System Administrator in Admin. Typical reasons to book people out of the schedule would be Holidays, meetings and similar.

- Enter a description of the booking.

- Select the time in hours or days.

- Choose if this meeting is "editable by everyone"
    - If this option is not selected then the appointment can only be edited by the person who made it.

- Finally click on the "Drag to Create New" button and drop it into your schedule.

Tip: Bookings that come in using calendar sync will have the default booking type. If the default is "Dentist" this could lead to an odd calendar!

Editing Bookings

You can edit a booking in a number of ways.

- Moving the booking – just drag and drop
- Deleting the booking
    - Click on it and either press delete on the keyboard or click the delete button
- Changing the duration
    - Click the end or start of the booking and stretch or shrink the booking

Tip : You can only modify bookings that you created OR are marked as "editable by everyone".

If a scheduler puts an entry onto a schedule the Individual cannot edit or delete it.

Viewing others calendars

You can view the calendars of others in the office by selecting them from the drop down at the top of the calendar. The calendar header turns bright green to make it clear that the calendar you are now looking at is not your own.

You can see the other users calendar and make appointment bookings in that calendar. You have no visibility of their timesheet.

Clicking “my calendar” will revert the view to your own calendar.

Tip: This feature is permission controlled, if you cannot see it, ask your system administrator.

Syncing my calendar with other calendar packages

NOTE : PLEASE BACKUP YOUR CALANDAR BEFORE SYNCING TO TRAFFIC LIVE.

You can set Traffic LIVE to synchronise with your calendar package.

Traffic LIVE is on-line, so we sync with the online calendar provided by Google. Google in turn allows you to sync to other calendars.

The authoritative source of which calendars Google supports can be found here

http://www.google.com/support/calendar/bin/topic.py?topic=15305

The information below is reproduced for each of reference and is correct at the time of writing – September 2011.

Google continually improve their products and it is likely that the range of devices offering synchronisation with Google will grow with time.

Once set up the involvement of Google in the sync process is transparent to the user.

Supported Packages

Outlook

Currently, Google Calendar Sync is compatible with Microsoft Outlook versions 2003, 2007, 2010 and operating systems Windows XP, Windows Vista, and Windows 7.

Windows XP 64-bit Edition is not compatible with Google Calendar Sync at this time

iCal

Apple iCal 3.x and up (on Mac OS X v10.5+)

Sunbird

Mozilla Sunbird 0.8+ and Lightning in Thunderbird support CalDAV sync

Android

BlackBerry

iPhone

iPad

Nokia / Symbian

Windows Mobile

The synchronisation of calendars between systems works well, however each calendar program tends to work in a different manner and as such tends to have limitations. These limitations in general do not impact "normal" use but functions such as recurring appointments for example tend to work very differently between systems and are subject to limitations.

Please review Google

http://www.google.com/support/calendar/bin/topic.py?topic=15305

And follow the links to your chosen application to determine any limitations as to the synchronisation ability.

You should also exercise caution if you are seeking to sync for example Traffic, with Outlook and also an iPad. Keeping three devices in Sync introduces more and more variables and runs the risk of unpredictable results. Please be guided by the recommendations given by Google. If you are attempting multiple way sync then please experiment with this first using non critical data to ensure you are happy with the results. The number of possible sync combinations including versions runs to several hundred and whilst we have extensively tested the calendar sync feature, we have not sought to test every possible calendar combination

We chose Google as our calendar sync intermediary as they offer more calendar support and more sync reliably than anyone else.

Outlook 2011 on Mac

Outlook 2011 on Mac is NOT currently supported by Google or any other sync package. The Outlook 2011 application was shipped without sync support and this issue has generated a huge amount of adverse comment on Outlook / Mac forums. We assume that over time Microsoft will build this support into the product and hence Google will offer support, however we have no more of an inside track on this issue than anyone else.

Features / Limitations in Sync – Traffic / Google

The Traffic LIVE "calendar" is more than a calendar as it contains both workflow items, and more traditional appointments / meetings.

In a nutshell Traffic LIVE will

- publish scheduled work to Google (ie one way)
- Synchronise appointments (ie 2 way)

You can optionally choose to sync only either meetings or scheduled work if you wish - see setting up calendar sync below.

In Traffic LIVE the user may not be able to move workflow or certain appointments. There is no way of enforcing these changes in Google, and hence onto say Outlook. As such there are a series of behaviours that you must be aware of when syncing with Google Calendar.

(Below we use the expression Google Calendar for simplicity, however Google will then sync to your chosen package)

- Scheduled work in Traffic LIVE will be shown in your Google Calendar. Google **will allow** you to move this scheduled work.

  When this move is received by Traffic LIVE it will be **rejected** and the Google entry returned to its prior state.

  We cannot allow Google to move work as this process follows complex rules in Traffic LIVE (deadlines, dependencies, lunch, end of day) which cannot be replicated on Google.

- An appointment added in Google will be entered into the Calendar with the default booking type as set by your system administrator.

- Scheduled work spanning more than one day is presented to the user in Google as an all day event spanning x days. The Work allocations in Traffic – for example a morning session of 9-12 and an afternoon session of 1pm- 5pm are not shown individually, but are annotated in the appointment notes

- If a recurring event is created in Google & synced to Traffic, the event will be non-editable in Traffic & will be flagged with a red border and have a title of "Recurring Event".

- Appointments in Traffic LIVE can be flagged “editable by everyone”. Appointments not flagged in this way can only be moved by the person who put the appointment into your diary.

  If you move an appointment in Google that you do not have authority to move in Traffic LIVE it will **move back again** when you next sync.

- A sync is performed covering a two month period (+- one month) from the current date selected in the date-field at the top of My

Calendar.

If the date-field has 01/08/2011 selected, the calendars will be synced between 01/07/2011 - 01/09/2011

Setting up Calendar Sync

First things first is that you need a Google Calendar.

I have an existing Google Calendar

If you already have an existing Google Calendar then you simply need to enter the details of your Google account as per below and click “Sync” in My Calendar.

Please bear in mind that ALL appointments’ in this calendar will be synced to Traffic LIVE. **Some of these maybe personal and you may not wish them to be seen by your colleagues.**

Your Google credentials are encrypted and Sohnar – the company behind Traffic LIVE - have no access to your password.

Backup your calendar before synchronising.

I do not have an existing Google Calendar

You will need to set up a new Google account

https://www.google.com/accounts/NewAccount

This asked a few questions and then sends you an email link.

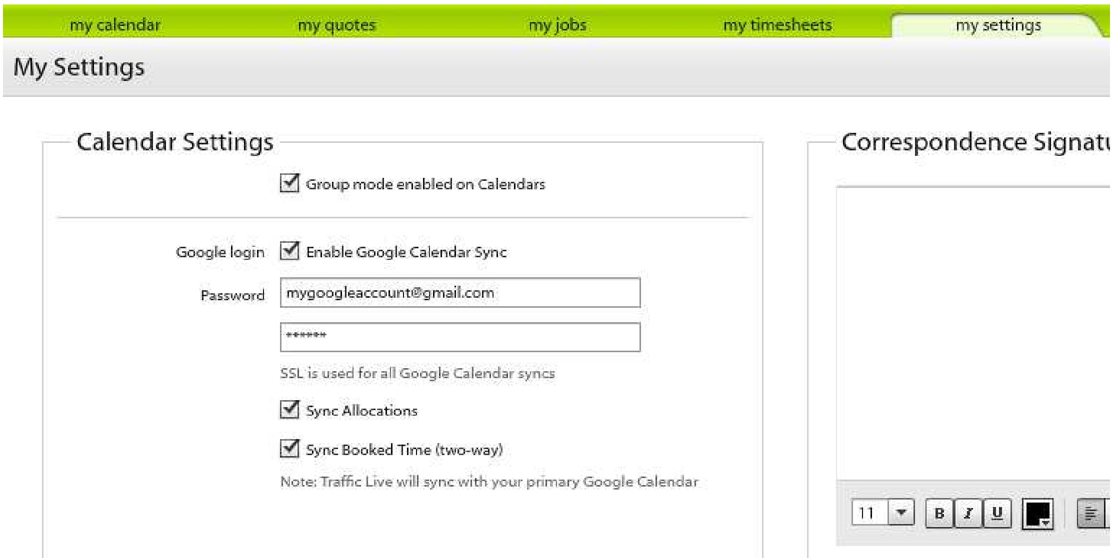
Click on this link and you will return to Google.

At the top of the screen on the menu bar click “MORE” and select calendar.

Enter the details requested and you are done. **This last step is important as it sets up the Google Calendar!**

From this point on you never need access your Google calendar ever again if you choose not to, you will just need to enter your account details in Traffic and follow the sync instructions given by Google.

Entering my Google Details in Traffic LIVE



Select My Calendar and the My Settings sub tab.

You must enable Google calendar sync by checking the box and then enter valid Google account settings. Your password is encrypted and cannot be seen by Sohnar staff.

You can choose to synchronise either you work allocations, your booked time or both by checking the boxes.

Once done click update.

Setting up Sync with my Calendar Program

Please visit

http://www.google.com/support/calendar/bin/topic.py?topic=15305

(or search “Google Calendar Sync” should this link no longer work) and follow the instructions provided by Google

Is it essential you read and observe any warnings, limitations recommendations made by Google in setting up your synchronisation and backup your calendar.

We recommend that you backup your calendar before setting up sync, so that should the synchronisation have unexpected results your data has not been damaged and can be restored.

You should exercise caution if you choose to ignore any warnings made by Google. Google will have placed them there as certain circumstances may give rise to unexpected results, even if things seem to work OK initially. Calendar synchronisation may seem simple but is deeply complex. Different calendars work in different ways.

How long will Sync take?

The time taken for the calendars to synchronise is a function of how many items are trying to be synchronised and the speed of your internet connection.

If the calendars have been synchronised before then only the changes are dealt with, whereas all events needs to by synchronised upon first use.

A typical sync time would be 10-15 seconds to sync Traffic LIVE with Google.

Your calendar application and Google will sync as frequently as they are set up to do so. The Google instructions will tell you the default sync frequency, and tell you how to change it.

Support for Google Calendar Sync

Sohnar, the company behind Traffic, will support you in ensuring that Traffic LIVE is successfully synchronising with the Google calendar. We are unable to offer any guidance or support for the subsequent sync of the Google calendar to other packages

We will always do our best to assist you using publicly available sources of information.

Google Apps

Google Apps is the paid for Google service. Traffic will sync with Google Apps calendars, however you must make this calendar public (which is not the default option) for sync to work.

Changing Google Calendars

If you wish to sync with a different Google calendar, or your calendar sync is giving unexpected results you can unsync the calandars.

To unsync on a PC click CTRL / SHIFT and the Sync button. On a Mac CMD / SHIFT and the Sync button.

You will see a dialogue box seeking you to confirm and the calendars will then unsync.

By unsync we mean that anything in Google will be left in Google and anything in Traffic LIVE will be left in Traffic LIVE.

You should backup you calendar before using unsync.

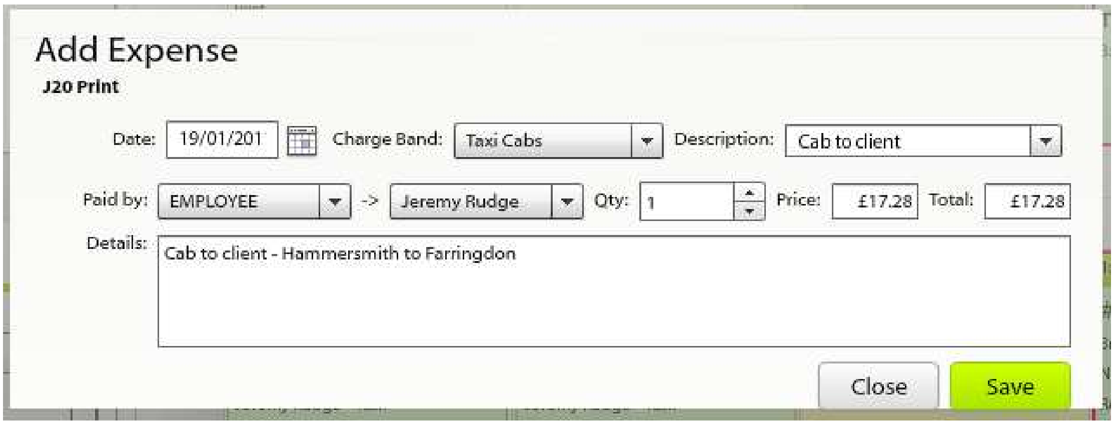
We would generally recommend you contact Sohnar Support before using this function as there should be no normal day to day reason to use it.

Adding Expenses

Select a task from the Allocated Tasks List or All Tasks list

Click Add Expense at the bottom of the Left Panel.

The Add Expense dialogue will show



You will need to complete the expense form

Date	The date you incurred the expense
Charge Band	All Expenses in Traffic are allocated a Charge Band that classifies the expense and also records the mark-up. Charge bands are set by your System Administrator in Admin You should select the charge band that most closely correlates to the expense you are incurring.
Description	If Traffic already holds estimated or actual expenses for a job within the Charge Band category selected they will

show when you click on this drop down. Simply select the relevant entry.

If for example you are recording Travel to Scotland, you would select Travel and if the person who set up the job and already set a category of “Travel to Scotland” this would show.

If the expense is not listed simply type the detail in the box and a new category will be created for it.

Paid By

Expenses can be paid for in a number of ways

No Purchase

- Items such as colour print outs have a cost but do not involve a specific purchase

Invoiced

- The company is to be billed and finance can expect an invoice

Credit Card

- On the company card

Employee

- You have paid for something and will be claiming it back

If you select employee you will need to say which employee in the next box

Qty	How many
Price	The price you paid. Traffic will handle the mark up for you.
Total	The total
Details	Details of the expense

Babble ™

Babble lets you … babble about stuff and collaborate with others working on the same job or task.

You can go and look at Babble, add to Babble, or if you are connected with a job be notified of Babble other people are Babbling about.

Traffic LIVE carries a trademark on the term Babble. For clarity in this guide we do not continually use the TM symbol.

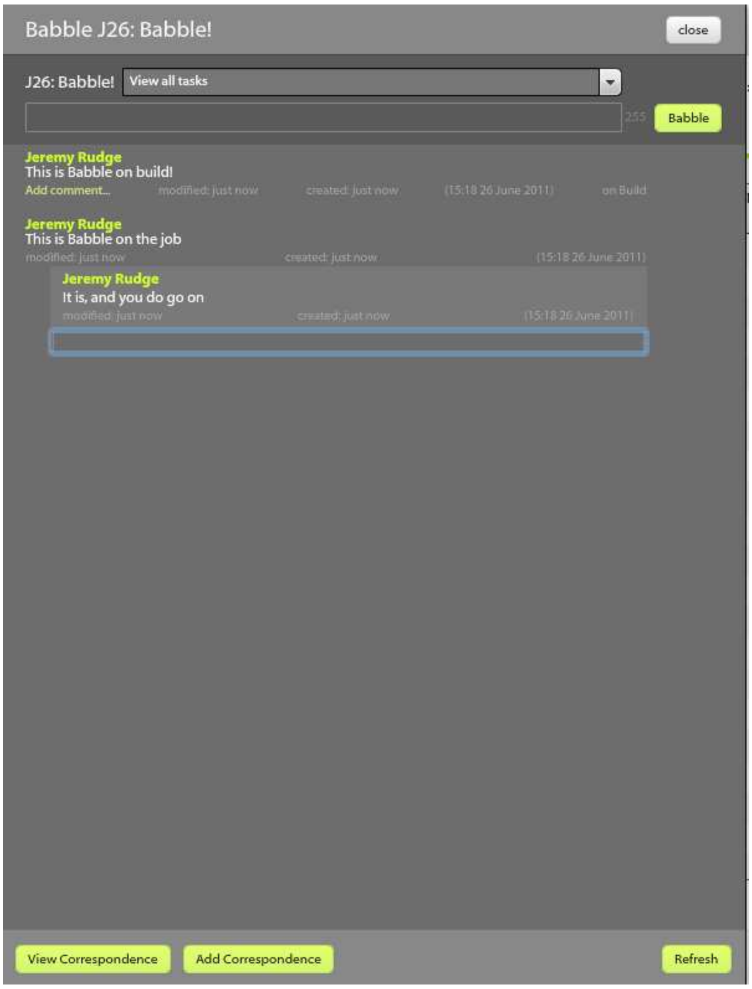
Accessing Babble

Babble is accessed by

- clicking the Babble buttons in
    - My Traffic / My Tasks
    - My Traffic / All Tasks
    - Jobs

- By clicking on a notification of Babble, see notifications

Babble



Babble is simple and intuitive to use and follows a method of working similar to some social networking sites which your team will be familiar with.

You can select if you want to view / add Babble to the whole job, or one task in particular.

You can start your own thread of comment, or comment and follow up on someone else's.

To see updates to Babble click Refresh.

Notification to Interested Parties

As soon as Babble is added all logged in interested parties are notified. We define this as the job owner and all people who are scheduled on the job.

Tip: Messages are meant to be short and to the point, hence they are restricted to 255 characters.

Tip: All interested parties are notified. Bear in mind that on a very large job this could be quite a few people. You should agree in your business an appropriate use for Babble.

Notifications

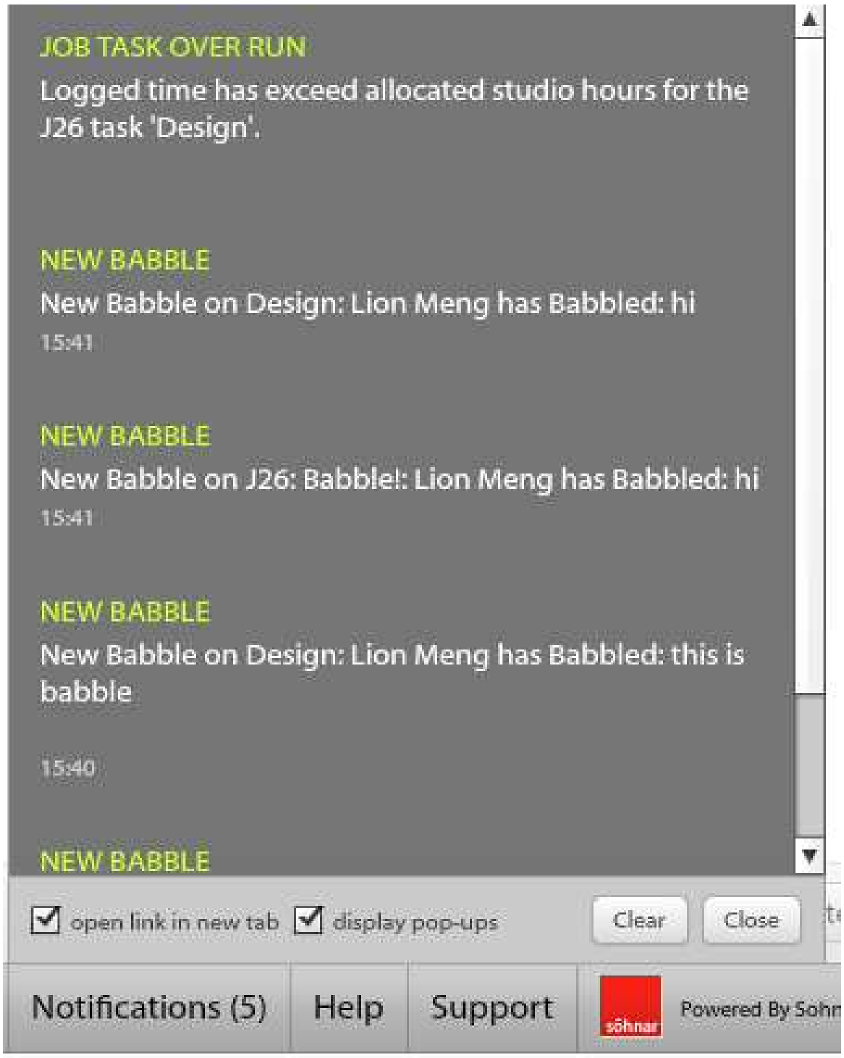
Traffic LIVE will notify users of events that occur in the system. Users must be logged in to receive these notifications.

How are you Notified?

You are notified in two ways

1. A notification dialogue that will appear in the top right hand corner of your screen on top of whatever program you have open

2. Notifications in the bottom right hand side of the Traffic LIVE screen. Clicking on “Notifications” will show you what they are.



If you click on the notified item you will be taken to an appropriate view, such as Babble, the job and so on.

You can control things like pop up notifications at the bottom of this view. If you are doing a presentation you probably don't want to know about Babble back at the office. Maybe you do!

Who is notified of what?

Babble	Notified to all people connected with the job, defined as the job owner and all people scheduled to work on it
New Work or work updated by a scheduler Allocation must be "Approved", "Pending" work not notified.	If new work is added with a start date of 7 days time or less, the person allocated the work is notified.
A Task or Allocation exceeding its hours	Notified to the job owner
A change in Happy Rating on a Job	Notified to the job owner

Storing Documents

Traffic LIVE stores files using a simple drag and drop interface. For simplicity we refer to these as documents, but you can store any file type, including .exe if you choose.

File storage must be enabled as an option for this feature to work, and you will be charged for storage used at your agreed tariff

There are no limits to the volume of storage that you may utilise. The maximum file size is currently 5tb.

There are no restrictions imposed on the file type that can be uploaded, nor do we open, check or scan files that your store.

We do require that you observe our acceptable use policy, and also observe the law, in particular Copyright – below.

Storing / Retrieving Documents

The "Doc Store" 

button will be green if this option is available

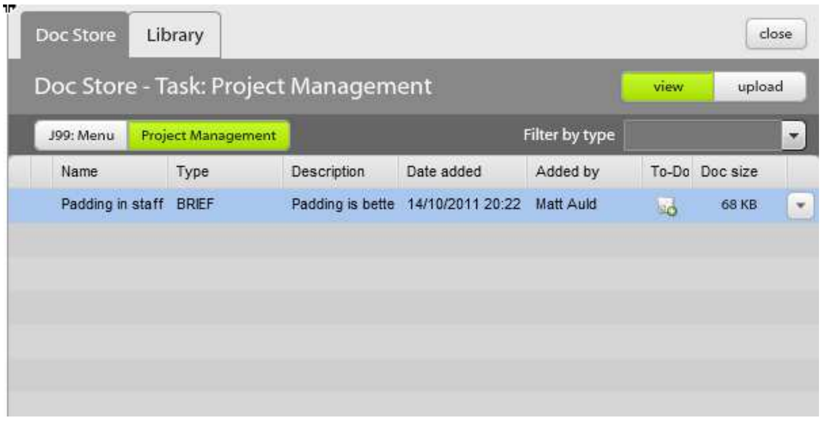
If it is grey this option cannot be used. This maybe due to

(a) a task must be selected from the left hand list so that Doc Store knows what files it is seeking to find

(b) Your permissions may not allow you access

(c) Your company may have chosen not to use this fantastic feature!

Clicking Doc Store will open the dialogue



From here you will see all files that you can download. Documents in the "Doc Store" relate to the job / task you are looking at, "Library" is a static set of documents that you can use for internal documents, briefing forms and so on.

Select the item and then choose an option using the selection bar on the right hand side of the list.

You can

- Open
- Download
- Delete

depending upon your permissions.

File Access Permissions

File storage is controlled by permissions.

As a user you maybe allowed to

- View documents
- Add documents
- Delete documents
- Access “Restricted” documents
- View all documents, or just those you have added

If you feel you need different permissions, please see your systems administrator.

If you choose to open a document you will first be prompted to save that document. This is required as for an application to open a file it must reside on your computer.

Note : Deleting a document once confirmed is final!

Versions

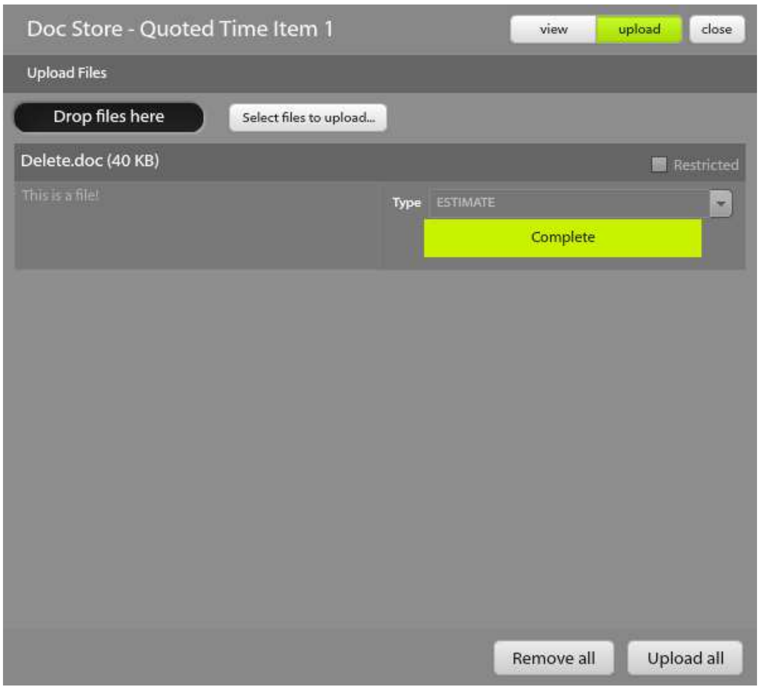
If you have downloaded a document and made changes, you must then save that documents back to the documents store – see below. A version of that document will not be automatically saved for you.

Documents Library

The document library allows you to make files available to all users. These could be briefing forms, templates, expense claim forms and so on.

Users with appropriate permissions can add and delete documents within the Library.

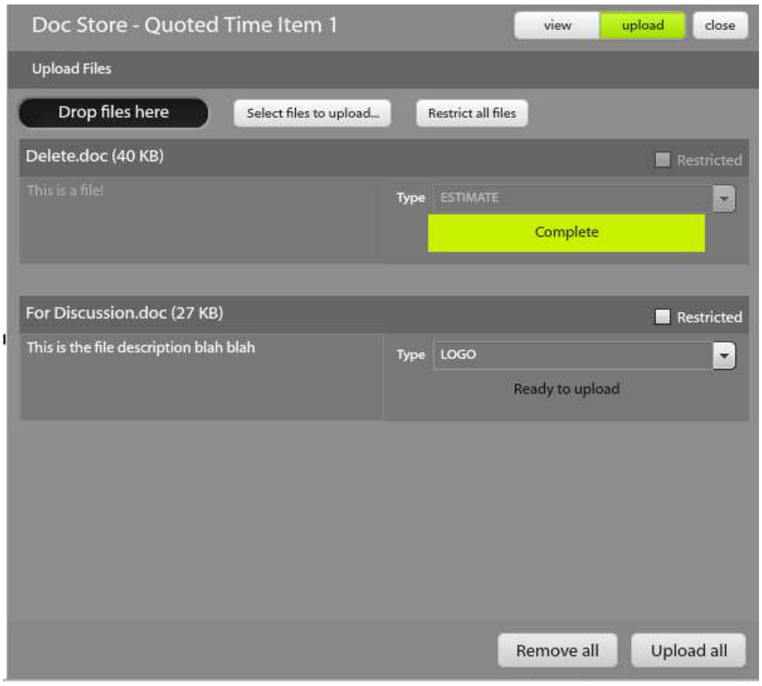
Saving Documents



Change the view to “Upload” by clicking the upload box at the top of the screen.

From here you can either select files to upload using a traditional “browse” method, or simply grab files from your desktop / file list and drag them into the application. You can multiselect and drag in several files at once if you choose. Folders dragged in are ignored.

If you drag files into the “view” option it will automatically change to Upload.



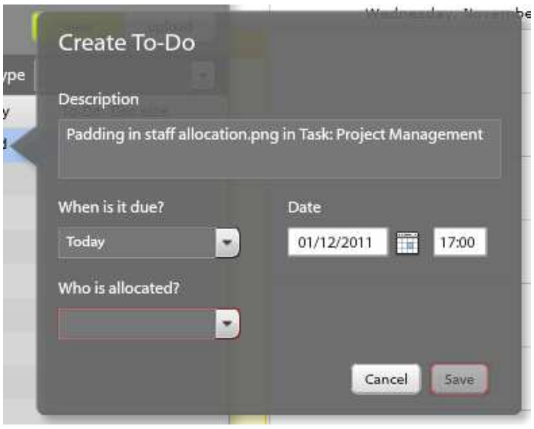
Once dragged in you can add a description and classify the file using the dropdown on the right.

If you have permission to access “restricted” files you also have permission to make a file restricted by checking the box. Only other users with restricted access will be able to see that file. Other users will see no reference to the file.

The file types are set by your company administrator, and if the list is not suitable, please ask them to change it.

When you are ready click “upload all” and the files will be uploaded in turn. Please bear in mind that internet connections typically upload slower than they download, and that larger files may take some time to save. The maximum file size supported is 5tb. There is no storage limit, but you are billed for the storage you consume.

Adding Workflow – To Do's – to documents



You can add a To Do to a document by clicking the To Do icon.

This allows you to put workflow onto a documents – for example asking someone to sign off the final proof.

You can enter a description, when it is due and allocated it to a member of the team.

Tip : You cannot allocate a To Do to a date / time in the past.

Suggestion: You can account for many potential scenarios by manipulating the main system and document permissions.

For example you could give internal departments access to Contacts only. You could then allow them to upload documents, and restrict them to seeing their own documents only. This would allow people to upload – for example – a brief and then apply to To Do to an individual for it to be dealt with.

Finding your files

Your files are "tagged" when they are stored.

You can store a file against

- A Client
- A Client Location
- A Client Employee

- A Project
- A Job
- A Quote
- A Task

Documents are tagged with the item you have stored it against together with its “parents”.

The hierarchies

- A Client
  - A Client Location
    - A Client Employee

- A Client
  - A Project
    - A Job
      - A Task
    - A Quote

As such if you store a document against a job, you will see that document when looking at the job, project or client.

Storing Documents

The time that a file will take to upload or download is dependant upon your internet connection speed. Please remember that most internet connections upload slower than they download.

Typical files – normal quality PDF for example – will be circa 200-300k. They will most probably upload and download almost instantly. You should consider that very large files – production quality PDF – may take a considerable amount of time to upload / download.

Deletion

You are prompted to confirm deletion of a file, **but once it has gone it has gone. We have no way of recovering files that you have deleted in error**. You should ensure that the permission to delete documents is only given to those who need it.

End of Agreement

Should your Traffic Subscription lapse then **your files will be deleted the day after your subscription comes to and end.**

Finding your files

Your files are "tagged" when they are stored.

You can store a file against

- A Client
- A Client Location
- A Client Employee
- A Project
- A Job

- A Quote
- A Task

Documents are tagged with the item you have stored it against together with its "parents".

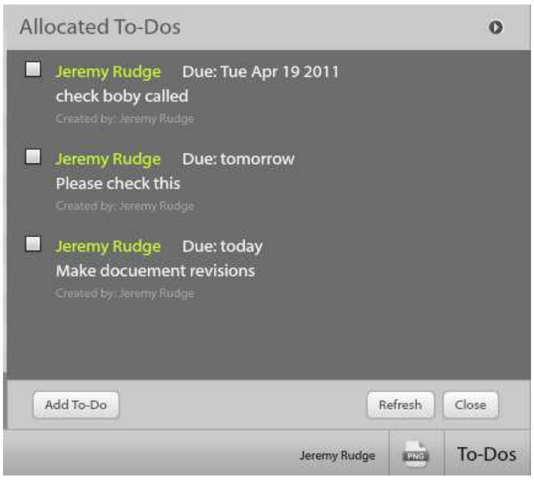
The hierarchies

- A Client
    - A Client Location
        - A Client Employee

- A Client
  - A Project
    - A Job
      - A Task
    - A Quote

As such if you store a document against a job, you will see that document when looking at the job, project or client.

To Do's



The To Do dialogue can be opened by clicking the "To Do" button at the bottom of the screen.

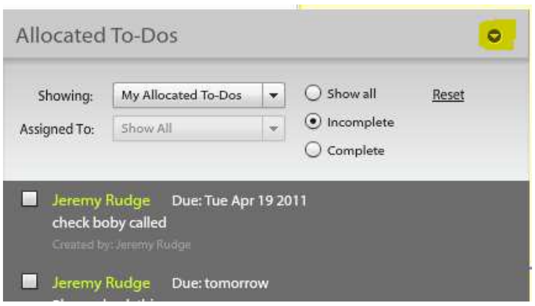
From here you can see and track To Do's you have allocated to other people, and action To Do's allocated to you by others.

To Do's can be added in three places in Traffic LIVE

(1) using the To Do dialogue described here
(2) adding To Do's to Correspondence items
(3) adding To Do's to documents

Scenarios 2 and 3 are covered in the relevant section of this user guide.

Changing the To Do view



By clicking on the arrow in the top right of the To Do box (highlighted) you can select to see To Do's allocated to you, or track To Do's created by you and assigned to others.

Editing / Deleting To Do's / Seeing More Detail

Rolling your mouse over a To Do will allow you to see more detail about the ToDo.

If you created the To Do you can select to

- Delete the To Do
- Edit the To Do

Linking to the To Do item

If a To Do was created using correspondence or connected to a document then a "link" icon will be activated when you roll over the To Do with your mouse.

Clicking the link will

- If added in correspondence will take you to the correspondence record
- If added to a document will open the corresponding Job / Quote / Client Record / Employee or Location.

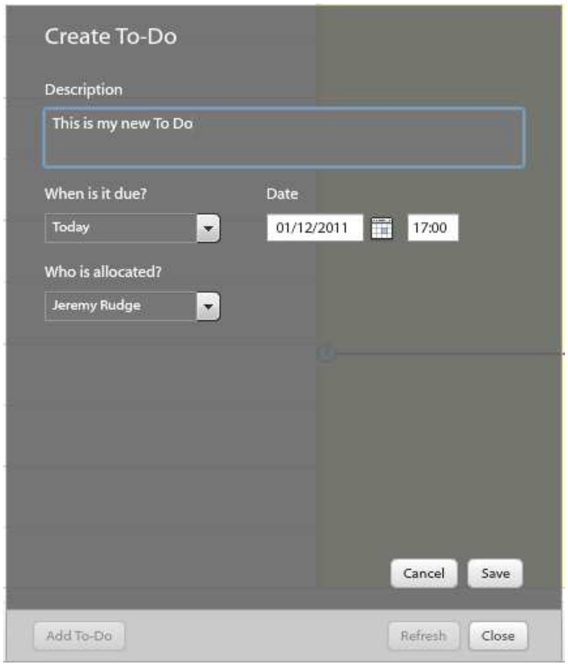
  If the documents was added to a Project, there is no "Project" view so the link will open the client Company.

Marking a To Do as complete

Click the check box next to the To Do.

Adding a To Do

Click “Add To Do”

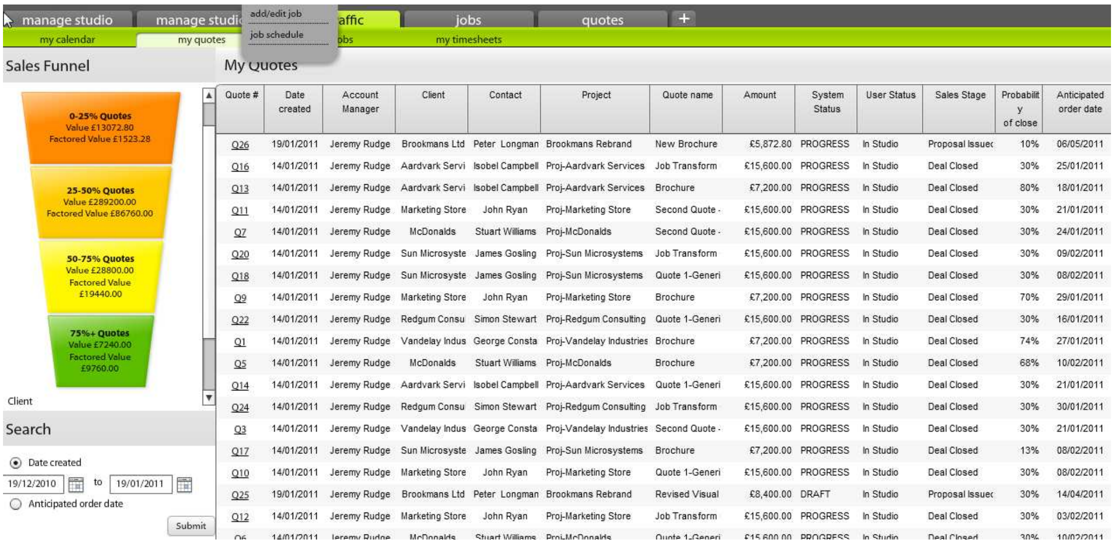


Enter your To Do and click SAVE.

You cannot allocate a To Do in the past, if you try to do this the form will not validate and you will be unable to click SAVE.

My Quotes

My Quotes displays quotes for which you are listed as the account manager.



Viewing Your Quotes

My Quotes displays quotes for which you are listed as the account manager.

You can sort the list by any of the attributes shown on the list simply by clicking on the column header. Columns can also be moved into different orders by Clicking and Holding you mouse on the header and dragging the column to its new location.

To view the quote Double Click on the quote number and the Quote will open in a new tab.

Tip : Changes to column order are only retained until you leave this view.

Tip : The default setting is to show all active quotes created over the last month. You can change the search criteria by opening the Search box and changing the search criteria and clicking Submit.

Filtering your Quotes

You can make you view more selective by filtering your view.

The "sales funnel" on the left hand side of the screen breaks down the quotations based on the "Probability of Close" percentage of the deal.

Deals are broken into four bands - 0-25%, 25-50%, 50%-75% and 75%+.

For each band the value and factored value is shown.

The value is the sum of the quotations.

The factored value is calculated by taking the value of a quotation multiplied by its probability of success. Example £10,000 with a 50% chance of success has a factored value of £5,000.

Factored value is a robust method of forecasting sales revenue as long as you have a good volume of quotations. Clearly any single quotation will either be accepted or declined, and hence either be worth nothing or its full value. Across a basket of quotes this evens out and will give you a forecast as long as the percentages are realistic.

Clicking View All will clear the filter.

You can filter by client by making a selection form the dropdown list under the Sales Funnel.

Exporting Quote Data

To export your data in CSV format click Export at the bottom of the screen.

If you have more than 200 quotes in your list then the data will "page". You can select to just export the current page or all pages. You can also choose to export all data, or just your filtered data set.

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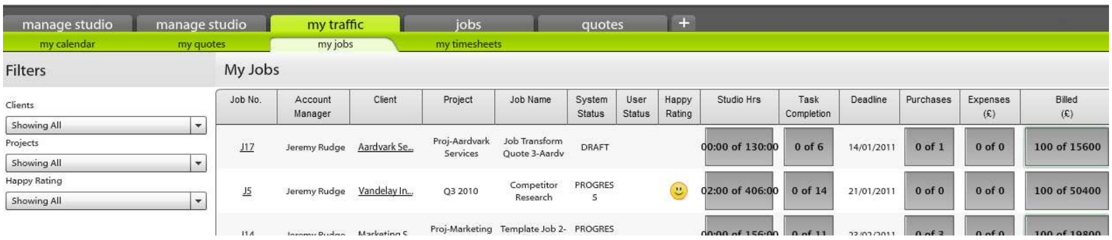
My Jobs

My Jobs displays jobs for which you are listed as the account manager.

Viewing Your Jobs

My Jobs displays jobs for which you are listed as the account manager.



You can sort the list by any of the attributes shown on the list simply by clicking on the column header. Columns can also be moved into different orders by Clicking and Holding you mouse on the header and dragging the column to its new location.

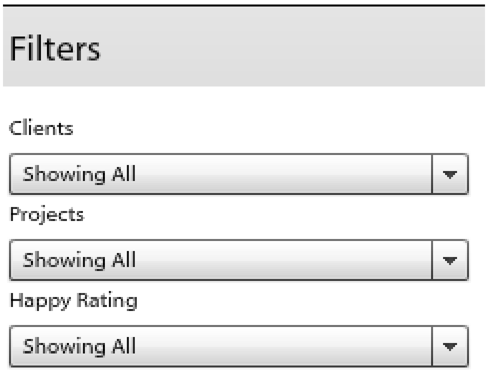
To view the Job Double Click on the quote number and the Quote will open in a new tab.

Tip : Changes to column order are only retained until you leave this view.

Tip : The default setting is to show all jobs created over the two months. You can change the search criteria by changing the search criteria and clicking Submit.

Filtering your Jobs

You can make you view more selective by filtering your view.



On the left of the view you can select to filter by client, project and Happy Rating.

Each job has three potential Happy Ratings

- Complete
  - All members of staff allocated to the job have indicated that their work is complete
- Sad
  - One or more members of staff have indicated that there is a problem with the job
- Happy
  - all is progressing normally

More details of which Tasks are happy etc. can be found by entering the job.

If multiple people are assigned to a task the status of each person can be viewed in Job Schedule.

My Timesheets

My Timesheets shows details of the time you have logged.

Viewing Your Timesheets

My Timesheets shows details of the time you have logged as a graphical progress bar.

Each user has a number of hours they are expected to log each day set in the Admin section of Traffic.

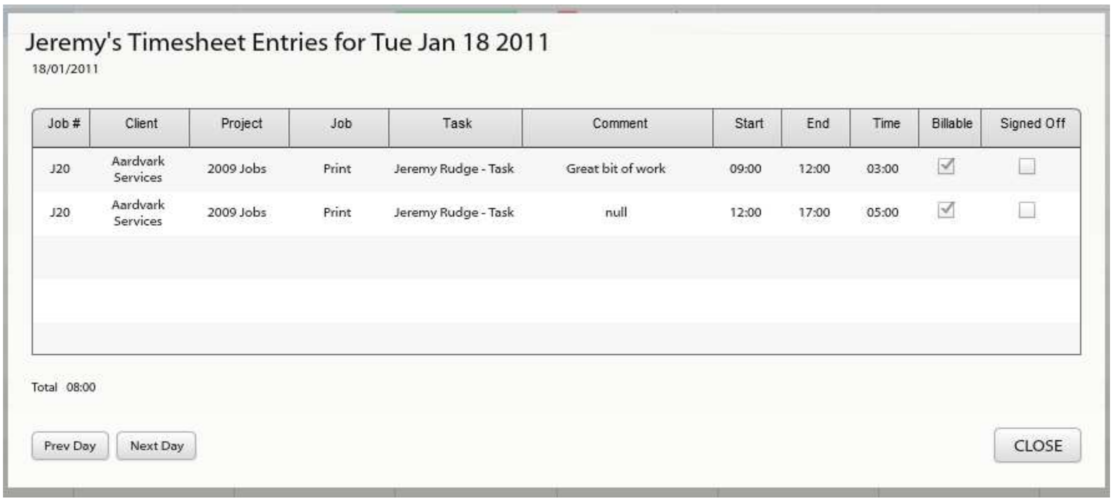
The progress bar displays the hours you have recorded relative to the hours you were expected to record.

If you have recorded less than the required number of the bar will be red, the correct number or more will display in Green.

There is a Vertical Bar within the progress bar. This is the 100% bar (ie you have logged the amount of time anticipated). The full deflection of the progress bar indicates upto 120% of the anticipate hours have been logged.

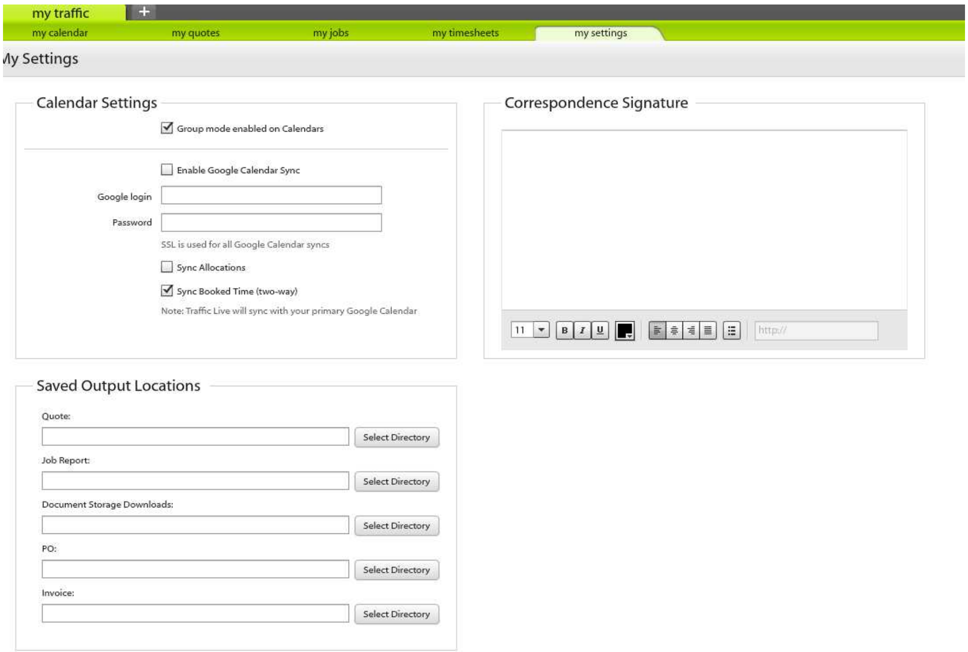
If non billable hours have been logged then these are shown in brackets.

To view details of the timesheets making up the hours double click on the progress bar.



My Settings

My settings holds settings personal to the user.



You can

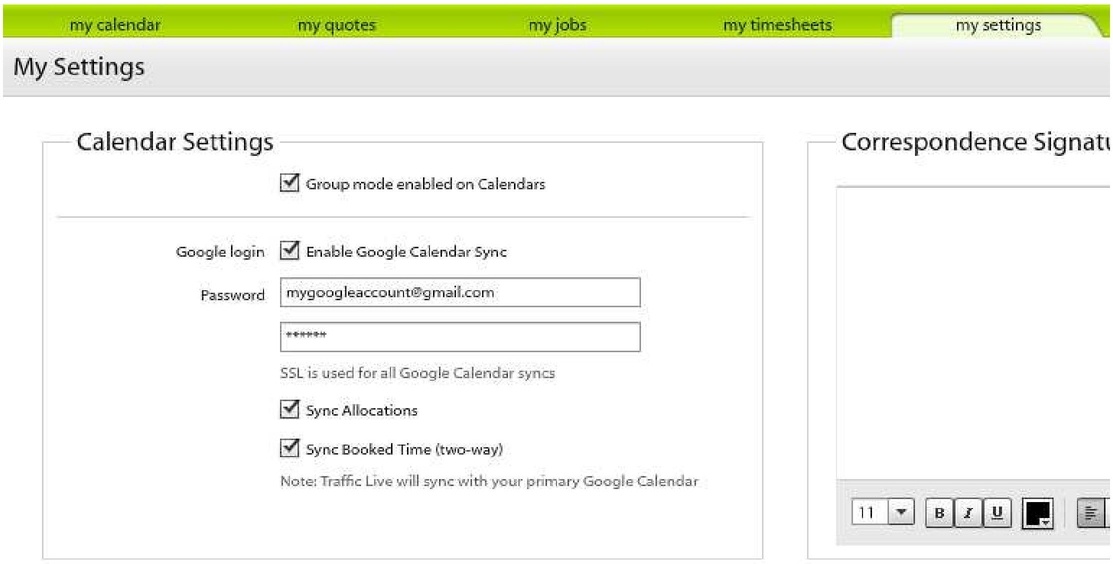
- Choose if by default your calendar has group mode on or off

- Set up Google Calendar

- Set you Correspondence Signature, which will then be attached to all outbound email.

- Specify where outputs the system produces are saved (these are local to the machine you are on, so if you use several machines you will need to set this up several times)

Entering my Google Details in Traffic LIVE



Select My Calendar and the My Settings sub tab.

You must enable Google calendar sync by checking the box and then enter valid Google account settings. Your password is encrypted and cannot be seen by Sohnar staff.

You can choose to synchronise either your work allocations, your booked time or both by checking the boxes.

Once done click update.

Tip: If you have changed your Google details you must close the application and login again for these changes to take effect.

Tip: Google details are only validated once they are called to be used when syncing the calendar, not when saved here.

Correspondence Signature

You can set a correspondence signature here.

You can either format it using the formatting built into the component, or use HTML if you have the skills.

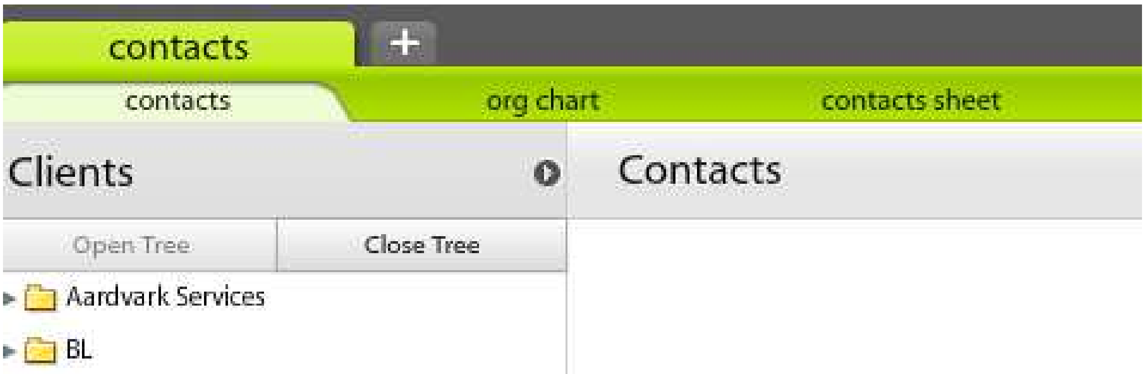
Your signature can also be set by your system administrator.

Contacts

To raise a quote or job for a client you must have a client, at least one address and one contact name.

Contacts holds details of the companies and people you do business with and shows you details of your business relationships with those people.

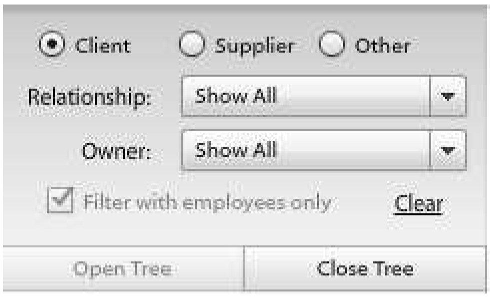
It also allows rapid recall of contact information through the production of an Organisational Chart.



Contact Types

Contacts holds details of companies and people you do business with.

Traffic recognises three categories of relationship



Client

Clients holds details of companies you do business with, you would like to do business with or have done business with in the past.

Traffic classifies these as Client, Prospect or Ex Client.

Supplier

Supplier holds details of companies who are your suppliers, or have been your suppliers in the past.

Traffic classifies these as Supplier or Ex Supplier

Other

Other holds details of companies with whom you may have a relationship with, but not as client or (job related) supplier. Examples might include trade bodies, local council services, local pubs and so on.

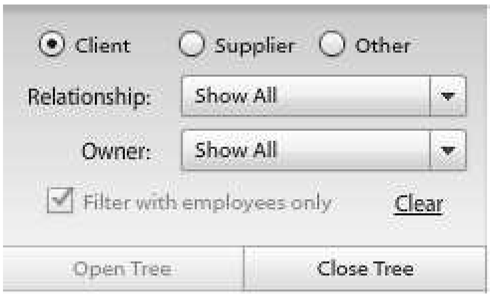
Once a company has been assigned to the category of Client, Supplier or Other **it cannot be moved to another category**. The reason for this is that the system forms different relationships for clients (what you have sold them) and suppliers (what you have ordered from them).

If a business is both a client and a supplier they will need to be entered twice.

The default system view is to show a tree of all Clients. To change this click the Icon to the right of Clients and select a new category.

Filtering the Company View

The view above can be expanded by clicking the arrow on the right. The view will change as below.

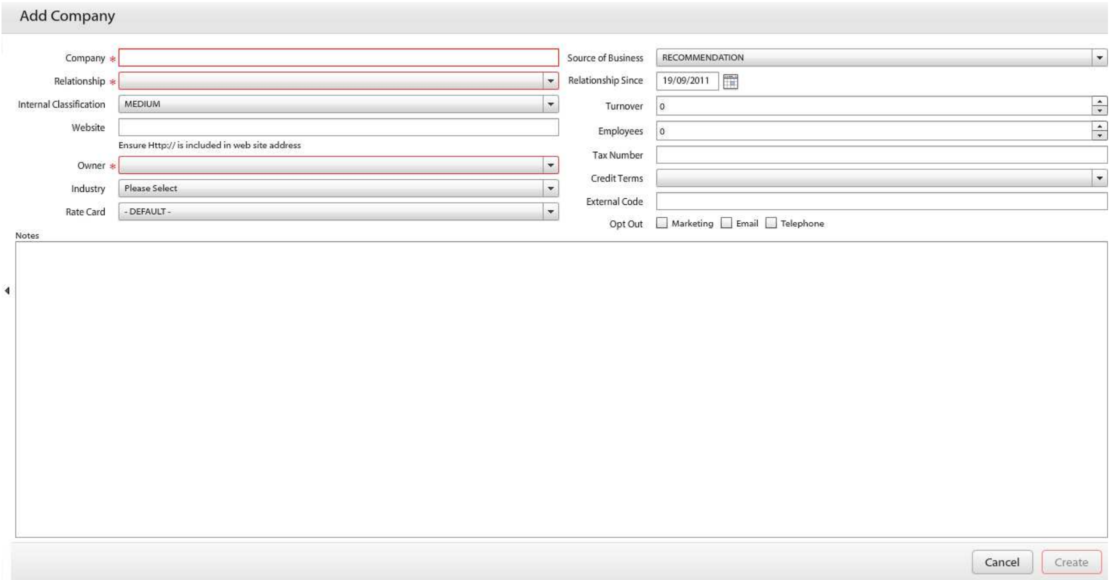


You may now select to filter this list to show

- only client relationships of a certain type (client / ex client etc.)
- only relationships owned by a certain person – i.e. possibly just your own
- you can exclude names that do not hold any employee data

Adding a Company

1. Select the appropriate type – Client / Supplier / Other as above
2. Click "Add Company" at the bottom left of the screen
3. Enter the required details. Mandatory fields are signified with a *
4. Click Create



If you have agreed client specific rates these can be setup in Admin by your system administrator. Once set up you can select the client rate card from the “Rate Card” drop down.

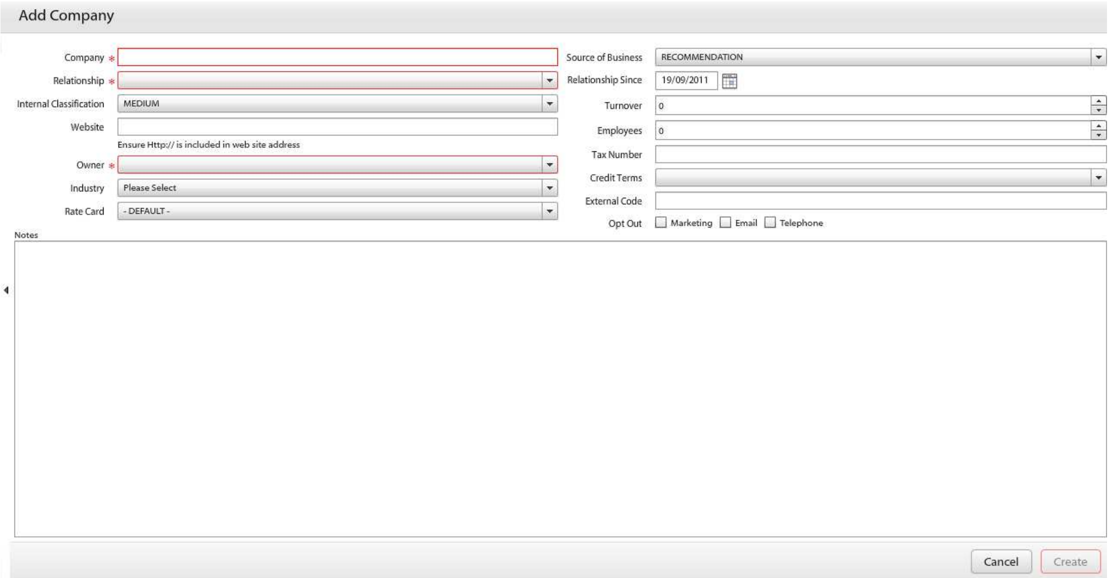
All subsequent quotes and jobs created for this client will use this custom rate card. Rate cards can be over ridden should you wish to apply different pricing.

Tip : If you cannot click create it is likely that the mandatory fields have not been completed.

Tip : If your Company has no addresses you will see an onscreen prompt suggesting you add one.

Editing a Company

1. Select the Company
2. Click Edit in the bottom right of the screen
3. Update the Company details
4. Click Update



Adding Addresses

Before you can add a quote or job for a client you must have at least one address

A Company can have an unlimited number of addresses. This caters for situations where for example you deal with multiple delivery addresses.

To add an address to a Company

1. Select the Company
2. Click Add Address
3. Add the required details
4. Click Create

Tip : Every Address has an "Address Name" that is mandatory. The Address Name is the name that appears in the left hand tree. Simply enter a name that will be meaningful to you as a company. An example might be "Head Office – London".

Tip : If the address you are editing has no employees you will be prompted to add some.

Adding Employees

Before you can add a quote or job to a client you must have at lease one employee

Each Address can have an unlimited number of Employees relating to it.

To add an employee

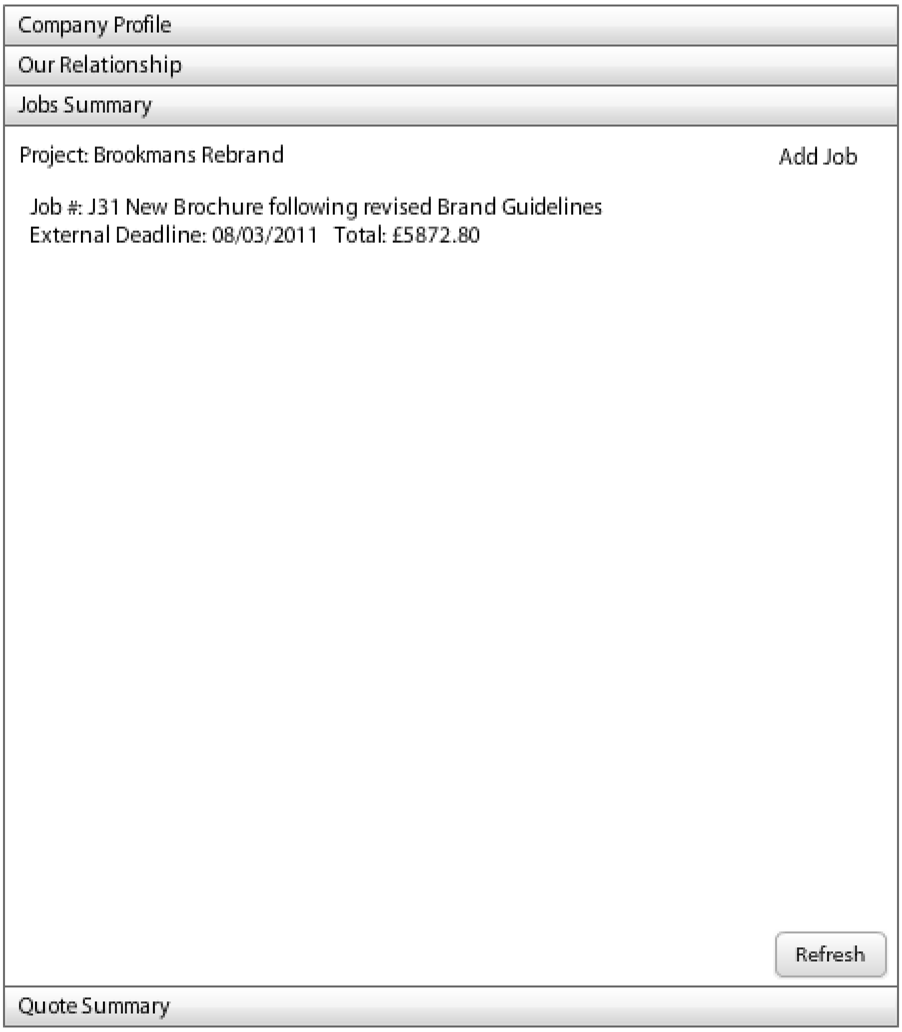
1. Select the Address
2. Click Add Employee
3. Add the required Details
4. Click Create

Tip : If you have already entered details of other employees, you can select “Reports to” from the dropdown. This is used to create a “hierarchy” which enables you to display a Organisation Chart using the Org Chart view.

Tip : When you add a quote or a job to a company you must specify who in that company is responsible for the job. As such you must have at least one employee to be able to add a quote / job to a company.

Your Relationship with clients / suppliers

On the Right hand side of the screen are panels which summarise your relationship with your contacts.



Depending on the type of relationship the information shown will change.

Client

Company Profile

- Static profile information entered when you created / edited the company

Our Relationship

- Shows a summary of the work you have done / are doing for the client and its value

Jobs Summary

- Shows a summary of all current jobs, grouped by project
- Double clicking on the job will open the job in a new tab
- A new job can be added to an existing project by clicking Add Job

Quotes Summary

- Shows a summary of all current quotes, grouped by project
- Double clicking on the quote will open the job in a new tab
- A new quote can be added to an existing project by clicking Add Quote

Supplier

Company Profile

- Static profile information entered when you created / edited the company

Purchases

- Summary of purchasing relationship from this supplier

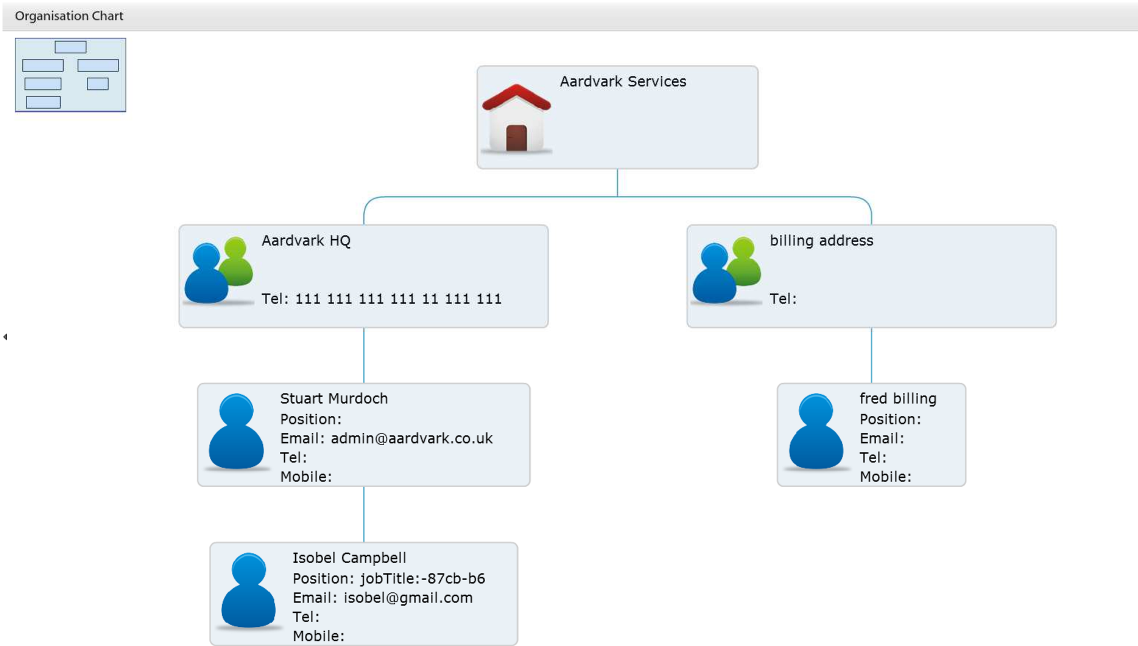
Other

Company Profile

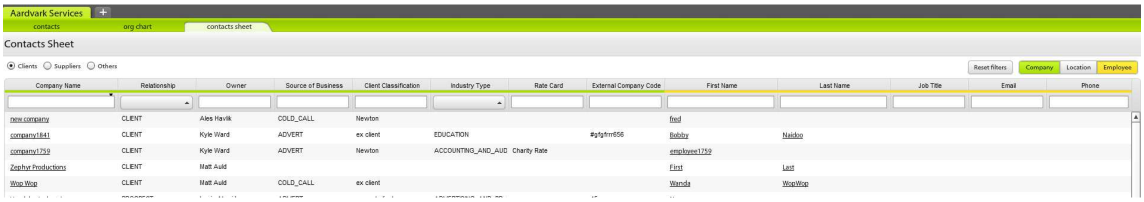
- Static profile information entered when you created / edited the company

Org Chart

Displays an organisation chart



Contact Sheet



The contact sheet allows you to search, view and export your contacts so that you may use them in mailings etc.

By default the Export option is disabled. Whilst probably stating the obvious export will allow those with privileges to export your entire client, supplier and prospect database.

Filtering the List

You must select if you wish to see clients, suppliers or other by making a selection in the top left.

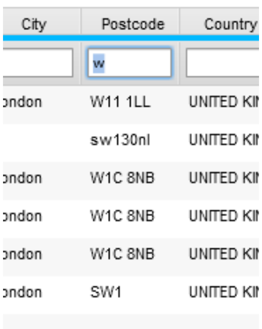
The display will then show all clients, suppliers etc.

You can make the list simpler to read by filtering out columns that you do not require by using the Company/ Location / Employee buttons.

At the top of each column is a filter. Depending upon the type of data this is either a selector box or a box you can type in.

If you type in a box it will filter the contents of that column to show those that contain the letters typed into the filter box.

For example if you want to see all clients with a W in their postcode



Using the List

The list will link out to either the Company or the Employee if they are clicked on.

This would allow someone to call all prospects in the W1 postcode for example. Each would open in a new tab and notes could be recorded in Babble.

Exporting the list

Click Export.

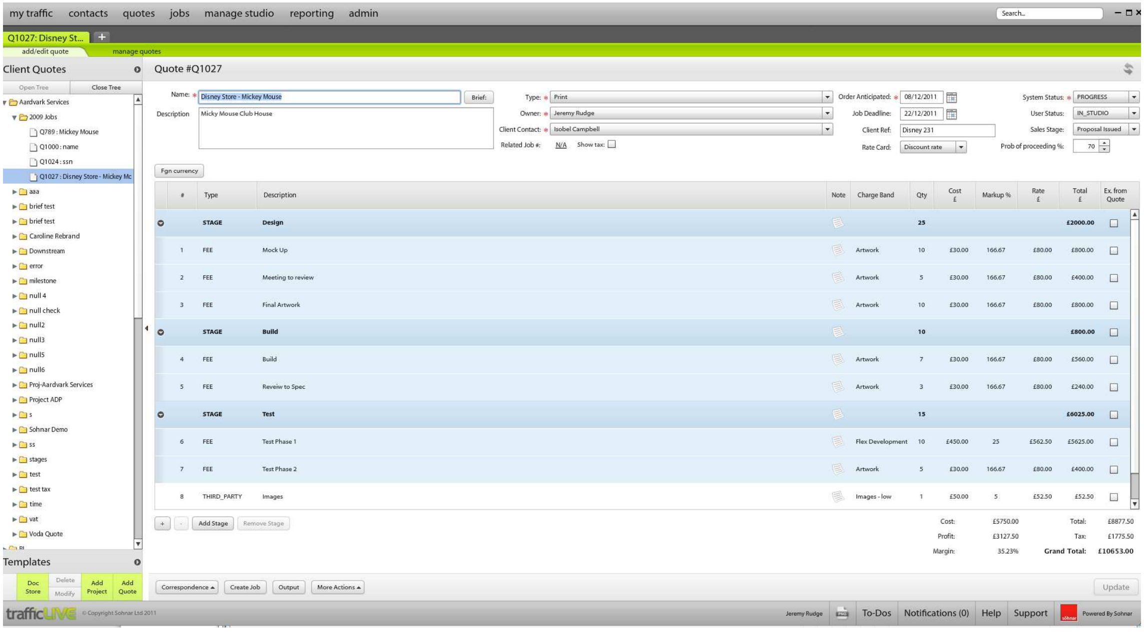
This feature is permission controlled.

Contact Records - Recording Client Communication

Click Correspondence at the bottom of the screen.

The instructions for using this feature can be found on support.sohnar.com.

Quotes



Quotes allows you to construct client quotations for work, understand cost, profit and margin information and finally when you are ready transition the quote to a job. You can quote using client specific rates.

You may raise a quote in any currency for the purposes of printing the quotation to the client however the underlying quotation is always held by the system in your chosen base currency.

Quotes are optional, and if not required you can construct a job directly. How to do this is covered in the Jobs section of Help.

Quotes comprises a two elements. If you cannot see one of these then your permissions will have been restricted by your system administrator.

- Add / Edit Quotes

Allows Quotes to be created, viewed and edited

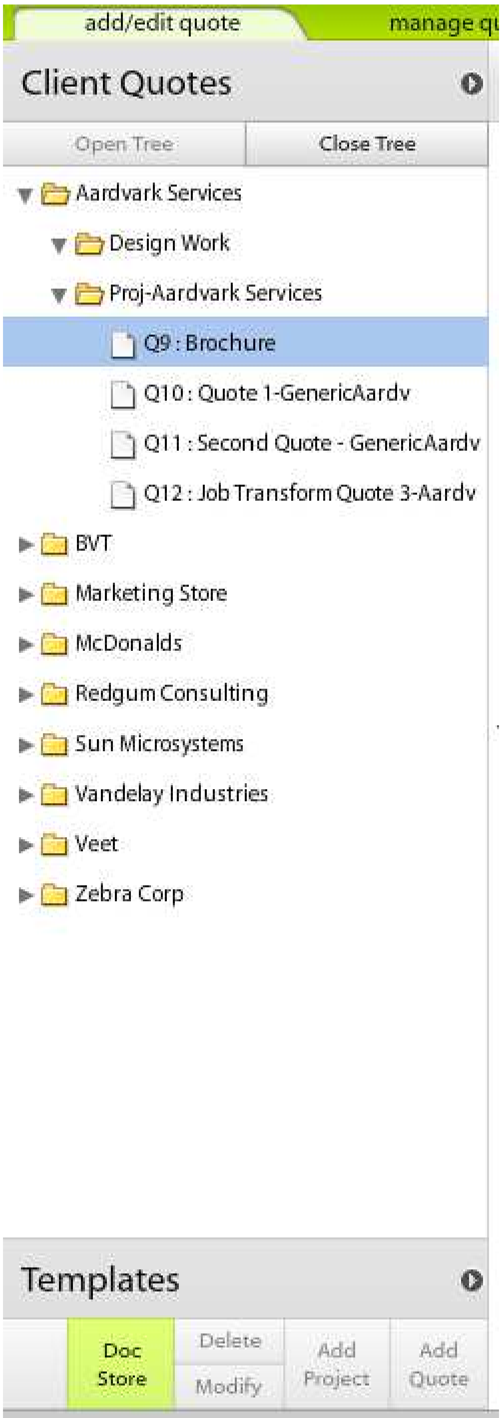
- Manage Quotes

  Shows all Quotes in the system and allows you to filter the lists to view them by person, client and so on.

Add / Edit Quotes

The Add / Edit Quotes view is made up of three key parts

The Left Hand Tree



The tree shows all Clients in the system and is the primary method of navigating Quotes

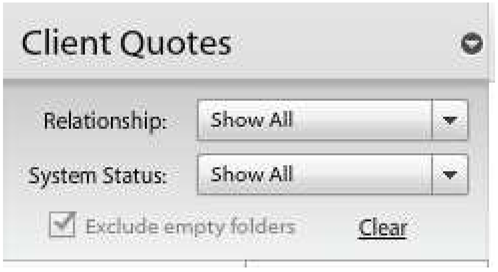
Expanding the tree by one level will show Projects for that client

Expanding the tree again will display Quotes

Clicking on a Quote will open it in the Display Screen

To save multiple clicks you can select a client and click "Open Tree" at the top of the list and the folders will be expanded.

You can filter the quote list by clicking on the arrow to the right of Client Quotes.

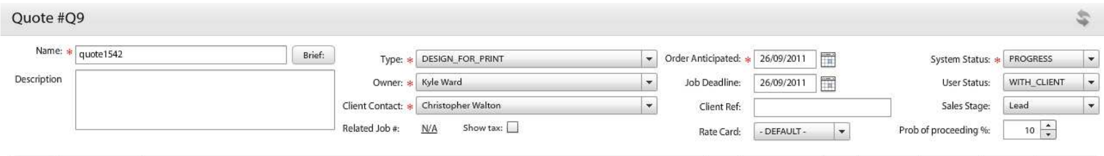


This allows you to show quotes for clients, ex clients and prospects, to filter by system status and also to exclude empty folders (for prospects that have no quotes for example)

A filtered list is usually quicker to navigate.

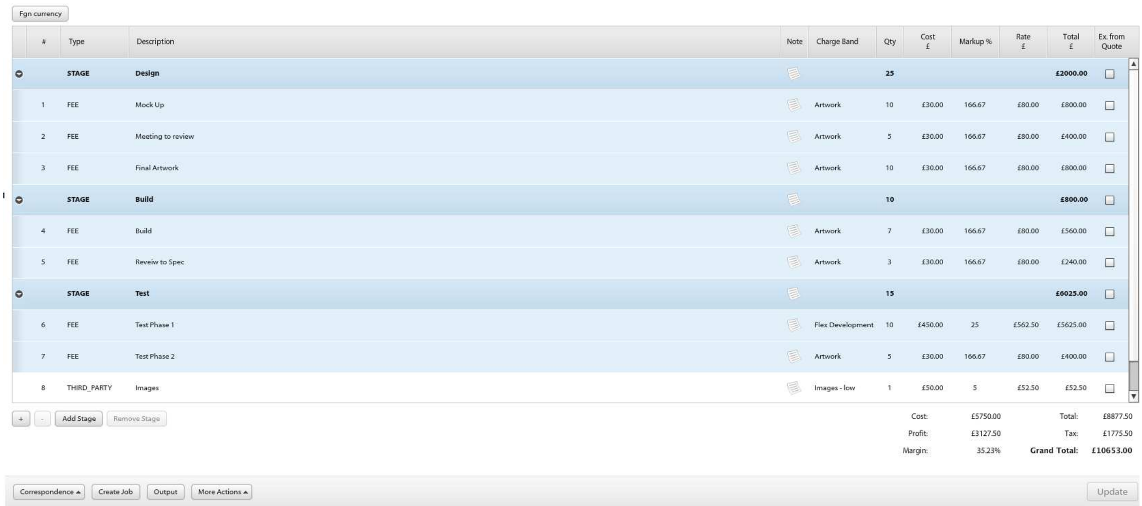
Header Panel

Displays information about the quote



Display Screen

The Display Screen shows details of the quote.



Projects

All Quotes (and Jobs) in Traffic exist within a project.

A Project simply holds together related quotes and jobs to make them simpler to find and manage.

As an example your client Brookmans Ltd may ask you to rebrand their company.

To effect this rebrand you may break conduct a series of jobs

- Brand Definition
- Visual Assets Design
- New Brochure
- New Web Site

All of these would be held within a single project called Brookmans Rebrand.

Tip : If you open a project and it seems to be empty, it maybe empty in say Jobs, but it probably contains Quotes.

Viewing a Quote

To view a quote either

- Use Search

  Simply type in the quote number or name in the search box and click on the desired quote

- Navigate using the Left Tree to the required quote and click on it

- View Quotes in Manage Quotes and click on the one you require

- In Contacts, open the “Quotes” accordion on the right hand side of the screen and click on the quote you require

- If the quote has been made into a Job, the Job will display the quote number, clicking on it will open the quote

Editing a Quote

To edit a Quote

- Select and display you quote using one of the methods detailed above

- Make edits as required

- Click “Update” to save

Adding a Quote

To add a quote you must first ensure you have added a project.

- Select from the Left Tree the client for whom you are adding a quote
- Click "Add Project" at the bottom left of the screen, enter a project name and click Create
- Click "Add Quote"

At this point a blank quote will be displayed.

An Explanation of fields

Job Name	*The name of the Job you are quoting for*
Description	*The short description of the job*
Brief	*Clicking the Brief button will open the Brief dialogue. Here you can enter and format text (or paste it in). If the box contains a brief it will be shaded Green to advise you it has contents*
Type	*All jobs have a type to allow later analysis. The Types are set in admin by your system administrator.*
Acc Manager	*The account manager responsible for the Quote. The dropdown displays all system users. If the list is long type their first initial on the keyboard and the list will jump to*

that letter

Client Contact	*The person at the client who is instructing you regarding this work.* *This person must exist as a client employee. If they do not you must add them in Contacts.*
Order Anticipated	*When do you think you will get the order?*
Deadline	*When is the work required. Completing this accurately will help others with capacity planning – which is what Traffic is all about.*
Client Ref	*Free form Client reference*
Rate Card	*You can set client specific rate cards in admin. If you have set a client specific rate to a client in Contacts then the chosen rate card will be used by default.* *If you wish to use another rate card you may do so by selecting it here. You will be warned that this will over ride existing rates. Please note that this will also reset quantise and pricing for 3rd party and expenses to their rate card amounts.*
System Status	*The quote can have one of 4 system statuses.*

- *Draft*
    - *The quote is being worked on*
- *Progress*
    - *The quote is progressing with the client*
- *Complete*
    - *The quote is complete and has been transitioned to a job*
- *Declined*
    - *The quote was declined by the client and will not progress, or has been superseded by another quote*

The status is used to determine is a quote displays in a view or not

The amendment of the system status is manual

User Status

In addition to the system status quotes have a user status to help you classify new business quotes in a way appropriate for your business.

The contents of the dropdown are set in admin by your System Administrator

Sales Stage

The Sales Stage determines where in the sales cycle the quote is.

	The contents of the dropdown are set in admin by your System Administrator
Prob of Proceeding	*The probability (0-100%) of the deal proceeding.* *This is used in sales forecasting.* *As a business you will need to decide on rules as to what deals in what state get what percentage. This is important as better information in will result in better information out* *The initial value of this is linked to the sales stage (so Proposal Issues may force this to say 30%) however the sales person can then enter any value they choose.* *Tip: Sales people are optimists!*

Quoting in Foreign Currency

You can issue a quote in a foreign currency.

It is important to note that the quote will be accounted for in your system base currency. All reporting will show the base currency values. It is only the client quotation that exists in the foreign currency.

Click “Alt Currency” and the current dialogue will appear.

1. Select you currency
2. Get the rate
    a. You can select the current rate – provided by Yahoo Money or;
    b. Your company rate if your system administrator has provided a rate. If no company rate exists then the option is greyed out
    c. If you prefer you can manually over type the rate in the rate box

3. Apply the rate by clicking the Apply button. You can choose to apply the rate
    a. To the selected line
    b. To all lines

You can then choose how the quote grid “behaves”.

If “Sync” is enabled (green) then any changes you make to either the sterling or currency values will remain synchronised.

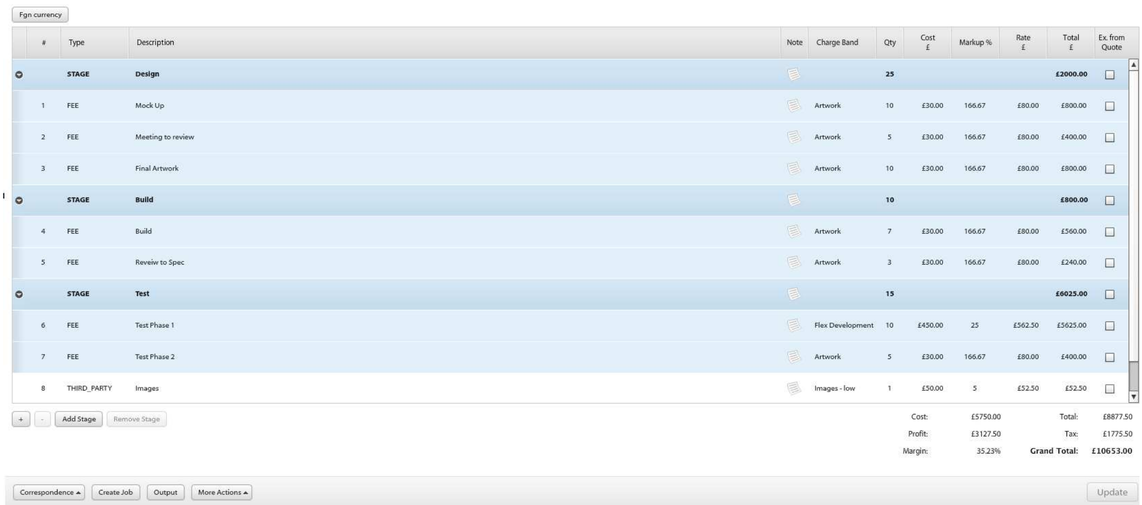
So for example if you have an exchange rate of GBP to AUD of 2, changing the GBP value to £100 would automatically change the AUD value to $200. Similarly changing the AUD value to 1000 would change the GBP value to 500.

This would be the behaviour you would typically expect, however you may choose to disable this function. In some circumstances. You may have an "odd" currency value AUD124.96 which you would prefer to express as AUD125.00 without changing the base currency. You could have a large 3rd party purchase and have for example purchased currency forward, and hence need to use a different rate.

Cols simply turns on or off the foreign currency columns. This may make the screen simpler to read if you no longer need to see the currency amounts.

When you output your quote Traffic LIVE will automatically pick up the foreign currency amounts.

Adding Items to your Quote


Fgn currency

#	Type	Description	Note	Charge Band	Qty	Cost £	Markup %	Rate £	Total £	Ex. from Quote
	STAGE	Design			25				£2000.00	
1	FEE	Mock Up		Artwork	10	£30.00	166.67	£80.00	£800.00	
2	FEE	Meeting to review		Artwork	5	£30.00	166.67	£80.00	£400.00	
3	FEE	Final Artwork		Artwork	10	£30.00	166.67	£80.00	£800.00	
	STAGE	Build			10				£800.00	
4	FEE	Build		Artwork	7	£30.00	166.67	£80.00	£560.00	
5	FEE	Reveiw to Spec		Artwork	3	£30.00	166.67	£80.00	£240.00	
	STAGE	Test			15				£6025.00	
6	FEE	Test Phase 1		Flex Development	10	£450.00	25	£562.50	£5625.00	
7	FEE	Test Phase 2		Artwork	5	£30.00	166.67	£80.00	£400.00	
8	THIRD_PARTY	Images		Images - low	1	£50.00	5	£52.50	£52.50	

+ - Add Stage Remove Stage

Cost:	£5750.00	Total:	£8877.50
Profit:	£3127.50	Tax:	£1775.50
Margin:	35.23%	**Grand Total:**	**£10653.00**

Correspondence Create Job Output More Actions Update

Your quote is comprised of Stages (optional) Tasks, 3rd Party Costs and Expenses.

To add line items to the quote

- click "Add Stage" to Add a Stage
- click the "+" button at the bottom of the grid to add a Task / 3rd Party Cost / Expense

You can also double click the grid and items will add in context to your current selection.

Selection	Double Click Result
Empty Grid	Adds a Task
Double Click A Stage	Adds a new Stage
Double Click a task that is within a Stage	Add a new task into that Stage

Stage "Rules"

The structure of a quote is subject to a few rules.

- Stages are optional
- Stages can only contain Time or Fee (see below)
- Stages cannot contain 3rd Party or Expenses, however you can order these items to show between stages for example so that the quote is displayed to your client by dragging and dropping
- You can have tasks that exist outside of a stage and order them where you wish

Stages cannot contain 3rd Party or Expenses as when the quote becomes a job this would require 3rd Party and Expenses to exist in Stages as well --- which having experimented ends up making the system far harder to use. We want to keep it simple.

Moving Stages / Task In / Out of Stages

You can drag and drop items as you choose

Move a Stage	Drag it where you choose
To Drag a Task to another Stage	Drag it from one to the other
To Drag a Task into a stage with no tasks	Drag it to the Stage. If the stage is empty positioning your cursor to the middle of the Stage will show a green line allowing you to drag into the Stage
To Drag a Task Out	Just drag it to an empty spot on the grid

The quote items are as follows

#	Type	Description	Note	Charge Band	Qty	Cost £	Markup %	Rate £	Total £
1	FEE	Research project to include clarification of copy updates		Project Manager	10	£80.00	100	£160.00	£1600.00
2	FEE	Revise Brochure in line with findings. Fee includes an anticipate 20% change in copy. Cha		Designer	100	£30.00	0	£30.00	£3000.00

#	*This is the line number. Its purpose is to make referring to lines simpler*
Type	*Each quote line is assigned one of 4 types* *Fee* *Time* *Purchase* *Expense* *You can optionally add a Stage to which you can add Fee / Time*

Both fee and time relate to jobs you are going to do in the studio that take time.

The only difference is how the system will bill the line.

Fee – The system will bill the amount estimated regardless of the time you spend. This is how the majority of businesses quote / bill.

Example – You estimate a piece of work will take 10 hours @ £100 – a total of £1000. The system will bill £1000 (unless overridden) regardless of if you log 5 hours or 25 hours.

Time – The system will bill for the time spent.

Example – You quote 5 hours @ £100 per hour for amends. If you spend 2 hours the system will bill 2 hours, spend 10 hours the system will bill 10 hours

Purchase – Something you are buying in – print for example

Expense – Expenses you may incur such as travel, accommodation and so on.

Description	*Detail of the item*

Note	*Item Notes. Clicking on the icon will open the notes dialogue. If notes have been typed in the notes icon will turn green*
Charge Band	*The charge band tells Traffic what the activity is and provides defaults as to cost and mark-up information* *There are three types of charge band, one for Fee / Time, one for Purchases and one for Expenses.* *The charge bands are set by your System Administrator in Admin.* *Tip – It is important you select the correct charge band and do not simply use the override features (see below). Traffic auto schedules jobs to people with required skill sets and if activities are not correctly classified auto scheduling will be misleading.* *Clicking on the Charge Band will turn the box to a drop down and allow the appropriate band to be selected.* *Upon selection the default values set against that charge band will load into cost, markup and rate. All items have a default quantity of 1.*

Qty	*Quantity.* *Depending upon the context this could be quantity of hours, number of brochures a so on*
Cost	*The cost to the business of the item.* *This will be drawn from the charge band, but can be over typed to reflect the cost of a purchase for example.* *For labour the cost should represent a typical cost for the service. The system will know when the work is actually done who is doing it and hence its true costs, but at this stage no one is allocated to the work – we are simply quoting.* *Tip : If you know that the "typical cost" will be wrong as you are going to need to employs a freelancer for example, override the costing*
Markup	*The mark-up on the cost. You can over write this value.*
Rate	*The cost plus the mark-up. In essence the selling price per unit of the service.* *You can over ride this figure, in which case*

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Scheduling creative business **online**

	the margin will update automatically.
Total	*The total charge (quantity * rate)*
	You can over ride this figure in which case the rate and margin will adjust automatically.
Ex from Quote	*Exclude from Quote.*
	This controls what is shown on the quote.
	The default behaviour with no boxes checked is for

- *All Stages to output*
- *Stages within tasks to NOT output*
- *Stand Alone Tasks / 3rd Party / Expenses to output*

Items checked will be excluded as follows

- *Check the Stage Line, but leave the tasks in the stage unchecked. The tasks will show on the quote, the stage will not*
- *Check one or more tasks, but don't check the stage. The quote will show the stage but the value of tasks checked will be EXCLUDED from the quote*
- *Check any item that is not a member of s Stage – it will be excluded.*

Removing Items from your Quote

To remove an item, select it and click “-“ at the foot of the grid.

Adding Tax to your Quote

Most businesses do not add tax to quotes. In some jurisdictions (Australia for example) it is the norm.

Checking the “Show Tax” box will show either one or two tax columns. The number of columns displayed is dependant upon the number of tax rates set in admin.

Clicking on the values in the Tax column will show a dropdown allowing you to select a tax rate from one of the values entered by your System Administrator in Admin.

Saving a Quote

Click “Update”

Quote Numbering

Once you save your quote it is allocated a quote number.

The quote number is made up of a prefix followed by a sequential number.

The prefix and your choice where the sequential numbering sequence commences is set by your system administrator in admin.

The default quote prefix is Q and the default number sequence commences at 1.

Tip: You may want to consider changing your prefix annually to make it clear when the quote was issued. For example in 2011 your prefix could be “2011:”.

Tip: Quote numbers and Job numbers are unique

Amending a Quote

You can amend a quote by opening it, making your changes and clicking Update.

Deleting a Quote

Click “More Actions” and Delete Quote

Creating a job from a quote

Once you have reached agreement with your client you can create a job from your quotation.

Click Create Job.

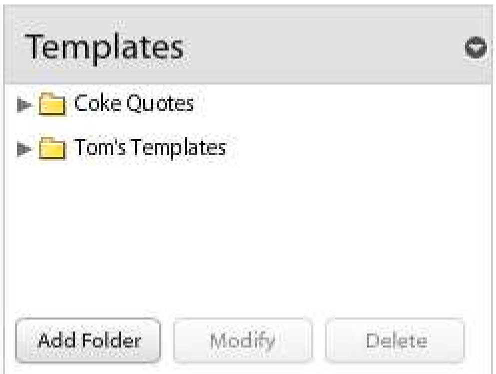
Copying a Quote

To create a copy of a quote click “More Actions” and select Copy Quote.

A copy of the quote will be created. The Name will have “Copy” appended to it. You can edit this as required.

Creating Quotes from Templates

To save constructing quotes manually you can create and use libraries of Quotes.



Quote libraries are public, hence any changes impact the templates seen by all users.

Tip : The folder structure for Quote templates is shared with Job Templates. If you see what seems to be an empty folder there is probably a job template in that folder which is not visible in the Quotes view.

Creating Template Libraries

In Quotes :-

- Open the Template expander by clicking the “>” to the right of the Templates title in the bottom left hand side of the screen
- Click “Add Folder”
- Enter your choice of folder name
- Click “Save”

Your folder will appear in the Template tree.

You can add nested folders by selecting an existing folder and following the process above.

Adding Templates to the Library

To add a template to the library

- Open the Templates expander
- Navigate using the upper tree to the Quote use wish to convert into a template
- Click and Hold on the Quote, drag it down to the required template folder and release your mouse button.

Tip : When the mouse is correctly positioned over a folder you will see a “+” sign

The quote will now be a template.

Modify / Delete a Folder

You can change the name of a folder using Modify, or delete the template using delete.

Using a Template

To use a template

- You must first open a quote. This can be an existing quote, or a new quote (Select client / project and click " Add Quote")
- Open the Template expander
- Select the quote template required, click and hold your mouse and drag the template into the white space at the bottom of the quotes grid
- Release your mouse button
- Alternatively double click on the template and it will load
- You will be prompted to confirm if you wish to Append or Replace the template
    - Append – will add the Template to the existing quote
        - This allows you to build a single quote form several templates
    - Replace – will clear the contents of the current quote and replace it with the templated content

Tip : The template only populates the Quote Grid. The header information (job name and so on) is not populated from the template and muse be completed in the normal way.

Tip: The Rate used is ALWAYS the Charge band rate so if you – for example – change your prices the template will automatically pick up the new price when used again. If you require a custom rate for a template, then use a custom rate card.

Creating a client quotation

Once your quote is complete you can create a quote matching your brand identity to send to your client.

The Quotation

The quotation produced will look similar to that below. Our templates are subject to revision so your may look a little different.

There is a templates forum on support.sohnar.com that carries template updates and ideas.

Quotation

Q6

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Sohnar Ltd Version 1
1 Glenthorne Mews
Hammersmith
London
W6 0LJ

Life Agency
1 Grren Space
Nice Town
Birmingham

BL12 A56

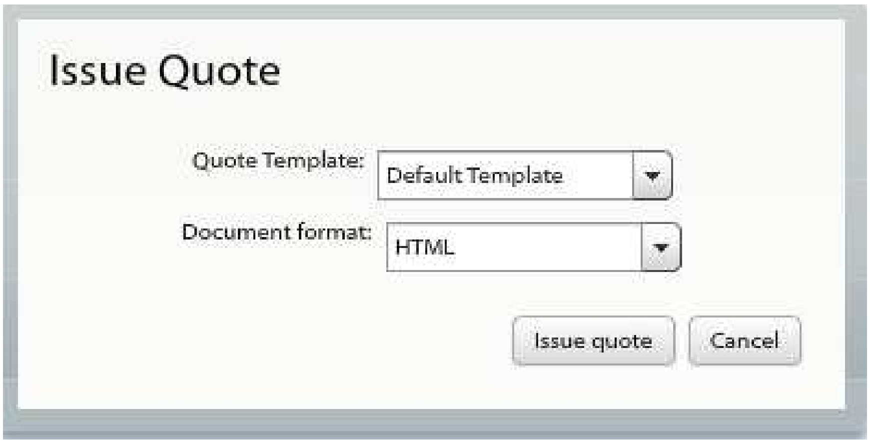
Date: 26/06/2011
Account manager: Jeremy Rudge
Quotation for: Brochure

#	Description	Quantity	Rate	Total £
0	Graphical Design internalNote:4aa2-940	18.00	100.00	1800.00
1	Document Layout internalNote:4f6c-b92	24.00	100.00	2400.00
2	Transportation internalNote:8d97f3f6	5.00	1500.00	7500.00
3	Printing of Brochures internalNote:ab89264a	1.00	750.00	750.00
4	Copywriting internalNote:2598a7fa	8.00	100.00	800.00

To product the quote click on the More Actions button

And select “Output”

You will see



Traffic LIVE can hold an unlimited number of quote templates. For example some clients may need to see hours on their quotes, and some may not. You can have differing templates to allow for these situations.

Click issue quote and the quote will be created in your browser.

You can choose to output the quote as HTML which you can then print to PDF or Traffic LIVE will produce a PDF for you directly.

PDF printing is undertaken on our servers and caters for a list of some 50 fonts. If your template includes unsupported fonts (custom fonts for example) you will need to print to HTML so that the custom font can be used – on the assumption you have installed it on your machine.

Printing to HTML to PDF

Once the quote etc. is displayed in your browser you can print to PDF. On a MAC this is a built in function. On a PC there are a wide variety of "PDF Printers" available free of charge.

We use http://www.dopdf.com/ , but a search of Google for "pdf printer driver" will show many more options.

If you have installed Adobe Creative Suite then the Adobe PDF printer will most likely be installed already.

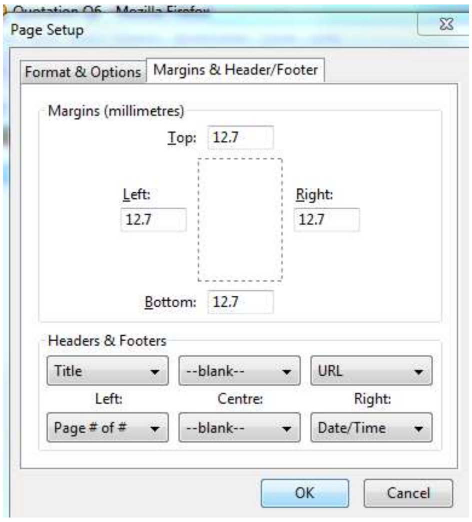
Turning off Browser Generated Headers and Footers & Printing Colours

Depending on your browser settings, when you print you may find that things such as the URL of the page you are looking at, the date and time etc. maybe added to the PDF.

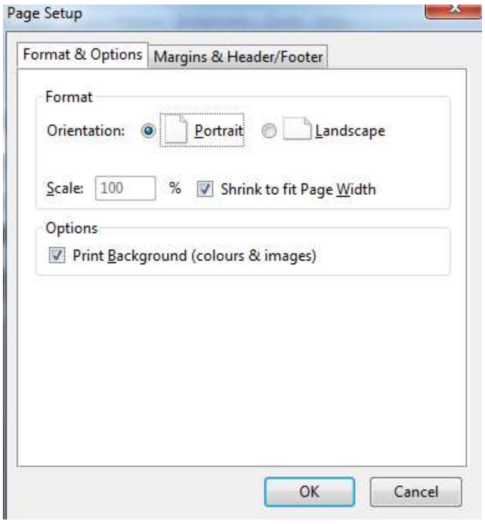
Additionally if your design includes coloured fonts or fill colours (table headers for example) you will need to enable "Print Background Colours and Images" or the browser will default to black fonts.

These settings can simply be changed

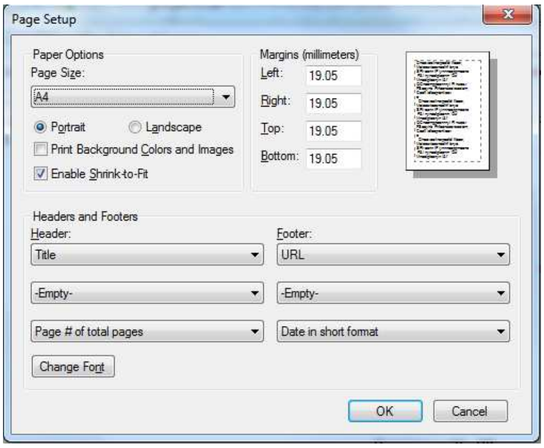
- Firefox
    - o File / Page Setup
    - o Select Margins / Headers and Footers
    - o Change all 6 options to "blank"



- o Select Format and options
- o Check the Check the box “Print Background (colours and images)



- Explorer
  - o Click the expanding panel to the right of the printer icon
  - o Select “Page Setup”
  - o Change all options to “Empty”
  - o Check the box “Print Background Colours and Images



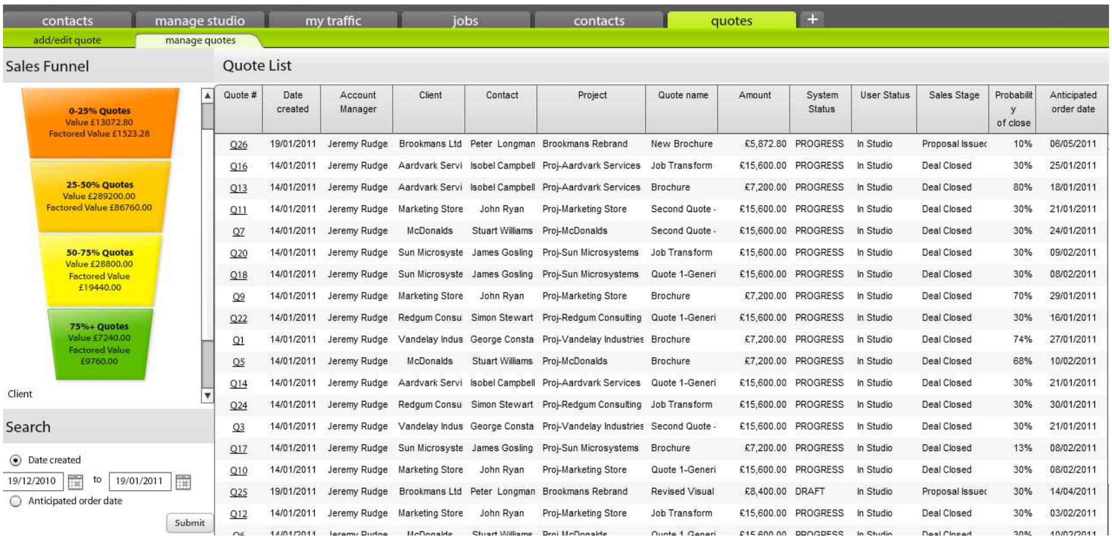
You can also edit page alignment here if you wish to use more of the margin, however please be aware that if changes are made here that are then not reflected in the Style Sheet of the template the pagination of the document my not be correct.

Emailing the Quote

Check the email box.

Manage Quotes

Manage Quotes displays all quotes in the system meeting the search criteria details in the search box (bottom left).



Viewing Your Quotes

Manage Quotes displays all quotes in the system meeting the search criteria in the search box at the bottom left hand side of the screen.

You can sort the list by any of the attributes shown on the list simply by clicking on the column header. Columns can also be moved into different orders by Clicking and Holding you mouse on the header and dragging the column to its new location.

To view the quote Double Click on the quote number and the Quote will open in a new tab.

Tip : Changes to column order are only retained until you leave this view.

Tip : The default setting is to show all active quotes created over the last month. You can change the search criteria by opening the Search box and changing the search criteria and clicking Submit.

Tip: If the volume of quotes exceeds 100 Traffic LIVE will “page” the information. To see the next “page” if data click the paging controls at the top of the screen.

Filtering your Quotes

You can make you view more selective by filtering your view.

The “sales funnel” on the left hand side of the screen breaks down the quotations based on the “Probability of Close” percentage of the deal.

Deals are broken into four bands - 0-25%, 25-50%, 50%-75% and 75%+.

For each band the value and factored value is shown.

The value is the sum of the quotations.

The factored value is calculated by taking the value of a quotation multiplied by its probability of success. Example £10,000 with a 50% chance of success has a factored value of £5,000.

Factored value is a robust method of forecasting sales revenue as long as you have a good volume of quotations. Clearly any single quotation will either be accepted or declined, and hence either be worth nothing or its full value. Across a basket of quotes this evens out and will give you a forecast as long as the percentages are realistic.

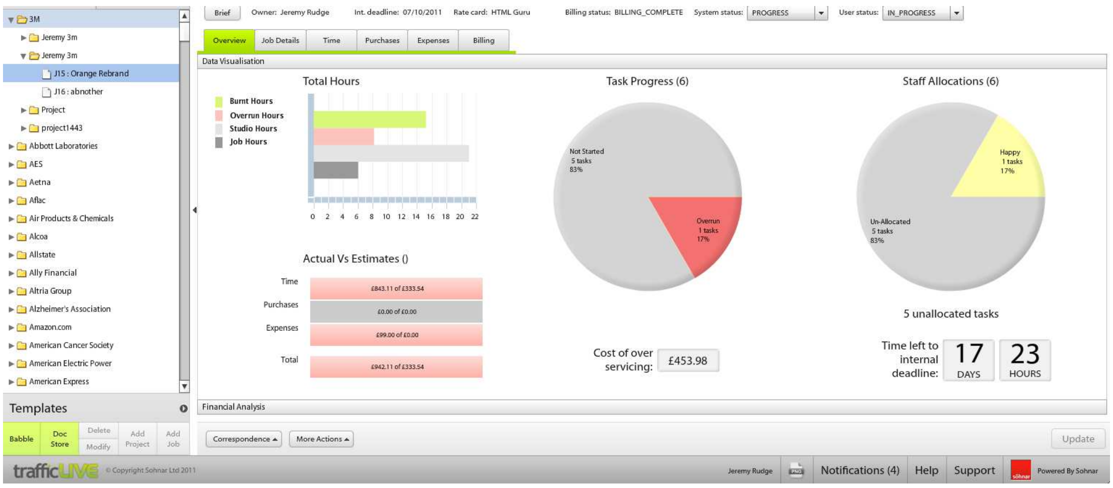
Clicking View All will clear the filter.

You can filter by client by making a selection form the dropdown list under the Sales Funnel.

Jobs

When setting up jobs think carefully about your chosen "hierarchy". If you drew your structure of client / project / job / stage / task would it look nice or lop sided? If it looks odd this is probably a warning. You should be using the whole hierarchy to give you a nicely "balanced" job, not to big, not to small. This is a HUGE area, so if you are concerned please ask Sohnar. Getting this right is important!

The Jobs module allows you to set up, schedule and monitor the progress of jobs.



Jobs can either be created from quotes, or set up independently.

Jobs comprises two elements. If you cannot see either of them then your permissions will have been restricted by your System Administrator.

- Add / Edit Job

  Allows Jobs to be created, viewed and edited.

- Job Schedule

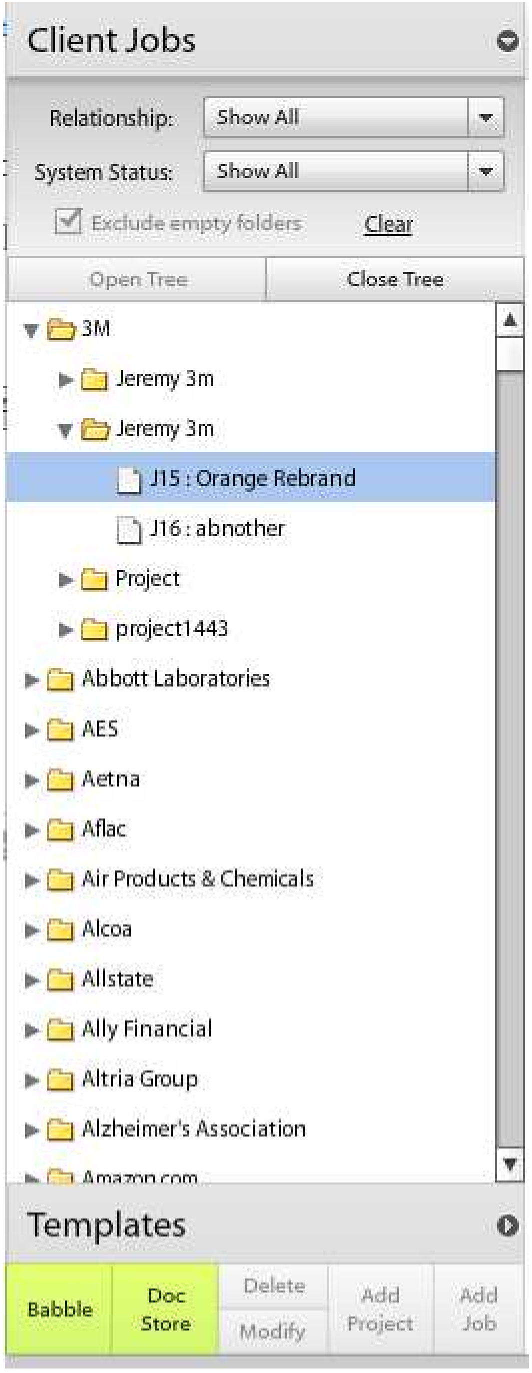
Allows jobs to be scheduled and people be allocated against tasks.

Tip : A job is a separate entity to a Quote. Whilst they are related changes you make to jobs and quotes are independent of each other. This feature allows you to express Quotes in client friendly terms and manage jobs using a different workflow structure and internal terminology.

Add / Edit Job

The Add / Edit job view is made up of three main components

The Left Hand Tree



The tree shows all Clients in the system and is the primary method of navigating Jobs. The top of the tree can be opened to allow the job list to be filtered.

Expanding the tree by one level will show Projects for that client

Expanding the tree by its final level will display Jobs

Clicking on a Job will open it in the Display Screen

Clicking Open Tree will expand the tree for the selected client and avoid multiple clicks.

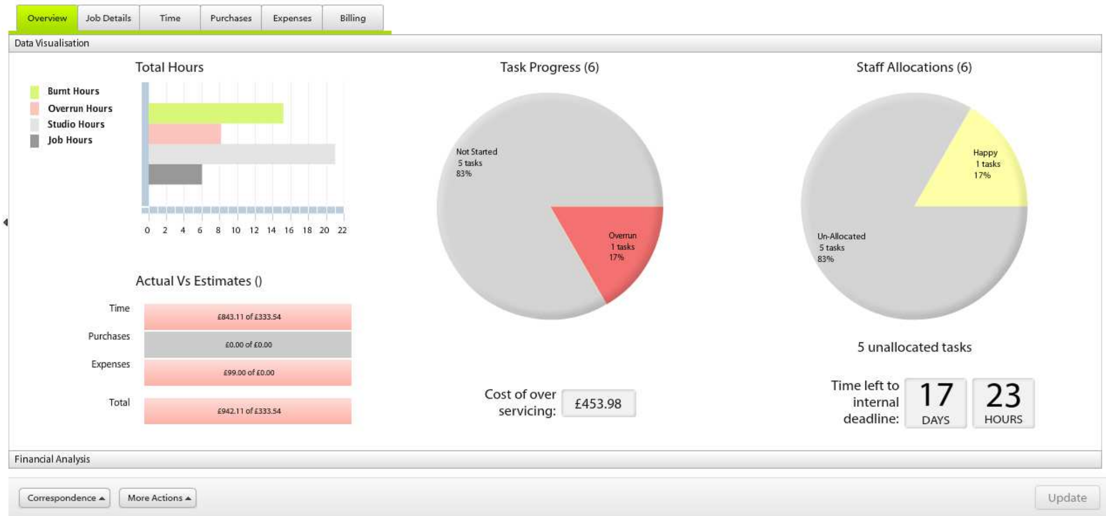
You can “Babble” on jobs and also store / recall documents in the Doc Store. These features are covered in the My Calendar section of this user guide and will not be repeated her.

Header Panel

Displays information about the Job

Display Screen

The Display Screen shows details of the job



Projects

All Jobs (and Quotes) in Traffic exist within a project.

A Project simply holds together related Jobs and Quotes to make then simpler to find and manage.

As an example your client Brookmans Ltd may ask you to rebrand their company.

To effect this rebrand you may break conduct a series of jobs

- Brand Definition
- Visual Assets Design
- New Brochure
- New Web Site

All of these would be held within a single project called Brookmans Rebrand.

Tip : If you open a project and it seems to be empty, it maybe empty in say Jobs, but it probably contains Quotes.

Viewing a Job

To view a Job either

- Use Search

  Simply type in the Job number or name in the search box and click on the desired Job

- Navigate using the Left Tree to the required Job and click on it
- View Jobs in My Jobs and click on the one you require
- In Manage Studio, Jobs Overview click on the required job
- In Manage Studio, Studio Overview click on the required job
- In Contacts, open the "Jobs Summary" accordion on the right hand side of the screen and click on the Job you require
- If the related Quote has been made into a Job, the Quote will display the Job number, clicking on it will open the Job

Editing a Job

To edit a Job

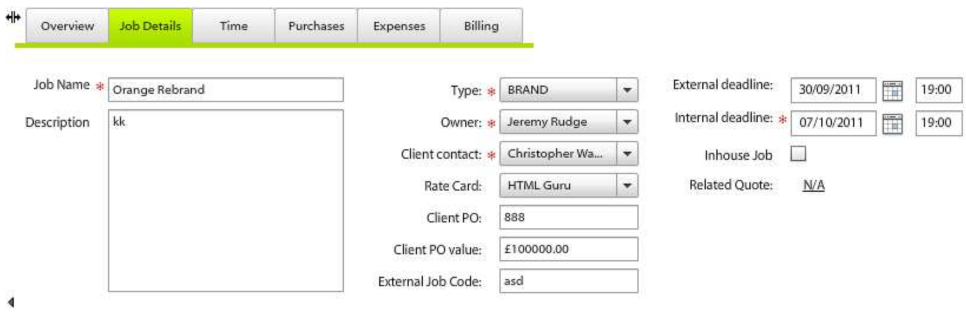
- Select and display you Job using one of the methods detailed above
- Make edits as required
- Click "Update" to save

Adding a Job

To add a Job you must first ensure you have added a project.

- Select from the Left Tree the client for whom you are adding a Job
- Click "Add Project" at the bottom left of the screen, enter a project name and click Create
- Click "Add Job"

At this point a blank Job will be displayed. The job will open in the "Job Details" view which holds information about the job, type, rate card and so on.



An Explanation of fields

Job Name	*The name of the Job*
Description	*The short description of the job*
Brief	*Clicking the Brief button will open the Brief dialogue. Here you can enter and format text (or paste it in). If the box contains a brief it will be shaded Green to advise you it has contents*
Type	*All jobs have a type to allow later analysis. The Types are set in Admin by your System Administrator.*
Acc Manager	*The account manager responsible for the Job. The dropdown displays all system users. If the list is long type their first initial on the keyboard and the list will jump to that letter*
Client Contact	*The person at the client who is instructing you regarding this work.* *This person must exist as a client employee. If they do not you must add them in Contacts.*
Rate Card	*You can set client specific rate cards in admin. If you have set a client specific rate to a client in Contacts then the chosen rate*

	card will be used by default. *If you wish to use another rate card you may do so by selecting it here. You will be warned that this will over ride existing rates. Please note that this will also reset quantise and pricing for 3rd party and expenses to their rate card amounts.*
External Deadline	*This is the deadline agreed with the client. This deadline is private and NOT the deadline propagated across the system* *The deadline has both a date and time. The deadline time defaults to your "Day End Time" set by your system administrator*
Internal Deadline	*This is the deadline you are working to internally. This deadline is the deadline visible across the system to others.* *The deadline has both a date and time. The deadline time defaults to your "Day End Time" set by your system administrator*
Client PO	*Details of the client Purchase Order*
Client PO Value	*Client PO Value*

External Job Code	*If you are linking Traffic LIVE to another system the external job code holds the job number in the other system so that entries can pass from one to another.*
External Job Code 2	*Some systems – those by DDS / Brand Ocean for example – require more than one code to identify the job. This is sometimes referred to as a product code. This code is currently only utilised in the DDS XML time export.*

System Status	*The Job can have one of 4 system statuses.*
	
	- *Draft*
	    o *The Job is being built, it is NOT live*
	- *Progress*
	    o *The Job is progressing, people are working on it*
	- *Complete*
	    o *The Job is complete*
	- *Declined*
	    o *The Job was declined by the client and will not progress*
	
	The status is used to determine is a Job displays in a view or not
	
	The amendment of the system status is manual

User Status	*In addition to the system status Jobs have*

a user status to help you classify Jobs as they progress through your business. Examples might include, With Client, One Hold, With QA and so on.

The contents of the dropdown are set in Admin by your System Administrator

Billing Status	*A read only billing status. The billing status is set within the billing tab on the jobs screen.*

The available billing statuses are

- *Not Billed*

  The job has not yet been billed

- *Part Billed*

  A bill has been issued but more billings are expected

- *Billing Complete*

  All billings complete and no further billings will take place.

Tip : The method of calculating profit on a job changes when the billing status is set to "Billing Complete". When all billing is finalised the profit by default is the total of *all billings less costs.*

Related Quote

If the Job was created from a quote then the Quote number will be displayed here.

Clicking on the Quote number will open the quote.

Tip : Please remember the Quote and Job are related but exist independently, so any changes you make to the Job will NOT impact the Quote.

The Jobs View

In Quotes the Quote view was free form allowing you to mix fees, time, purchasing and expenses in a single display. This gives flexibility for displaying the information to clients.

When viewed as a job the Fee /Time, purchasing and expense components are split into separate areas as they are managed in different ways.

The jobs view is made up of six sub tabs

- Overview

  Graphical and financial summary of the Job

- Job details

  Information about the job including deadline dates, rate cards and similar. In general this information is set at the beginning of the job and not subject to further amends.

- Time

  All Time and Fee items together with Milestones. In essence anything you want a person to do.

- Purchases

  All items you are ordering from an external supplier

- Expenses

  Expenses you incur on a job. Expenses are usually things that have not been ordered form a supplier – a Cab for example You can also use this feature to on bill catalogues of items such as Hosting.

- Billing

  Generates an invoice which can match you visual identity if required.

Overview

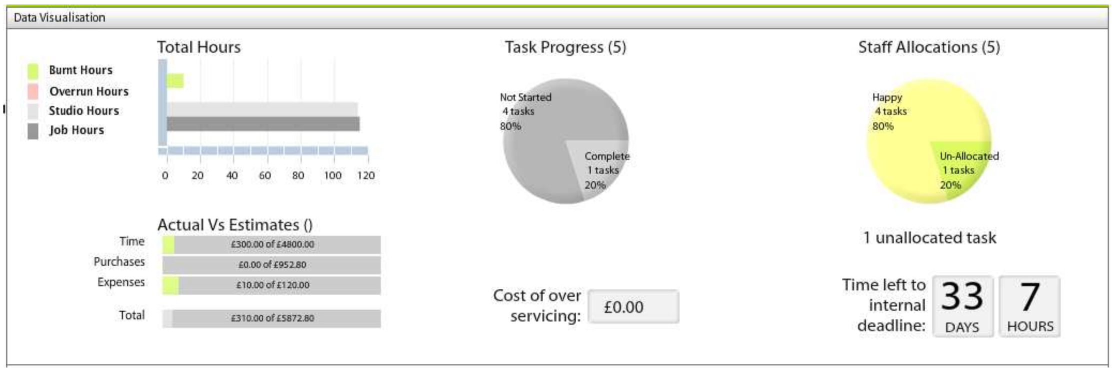
The job overview is made up of two views arranged as an accordion.

- Data Visualisation
- Financial Analysis

Clicking on the label bars will change the view.

Data Visualisation

This gives you a dashboard of the key elements of a job.



If you want to investigate more, you can drill down into the various job components in the time / purchase / expenses tabs.

The screen consists of 6 elements :-

Hours Graph	*Displays*
(For accurate figures, hover your mouse over the progress bar and you will see the time for each section)	*-the hours burnt on the job (both billable and non billable)* *- the Overrun hours* *Overrun hours are hours undertaken in excess of estimate by task that has a billing type of FEE. For example if you burn 10 hours against a 5 hour task, then 5 hours are over run hours.*

Tasks with a type of TIME do not contribute to over running hours as whist "over" you have told Traffic you will recover all monies due.

Tip : Just because a job is below its total hours, it can still have overrun hours – they are calculated by task

- the Studio Hours

Studio Hours are covered later in the section, but in essence you can allocate MORE or LESS time to the studio than sold. As such you can either pad the hours OR if a job has gone wrong, give it more time

- Job Hours

The hours estimates against the job – ie the baseline of what you sold / thought you were going to do

Actual vs Estimate

These summarise the financial position on the job,

	looking at what is actually happening vs what you anticipated happening. *They display figures and progress bars. The bars go red once Actual exceeds Estimate.* *Tip : These figures all INCLUDE markup so you are comparing like with like.*
Task Progress	*Gives a graphical view of how tasks are progressing.* *Tasks are either not started, in progress, complete or over running.*
Staff Allocations (chart not visible if no staff have been allocated to the job)	*Shows number of tasks* - *allocated to staff, and of these which are happy / unhappy* - *number of unallocated tasks*
Cost of Over Servicing	*This is linked to Overrun hours as described above.* *Over servicing is the value of the over run hours that in all probability you will not be*

	able to bill. *Tip : This is the most important single measure in the system. Agencies haemorrhage income be over servicing their clients, either due to mis-estimation, allowing scope creep or simply doing favours for allegedly profitable clients.*
Time to Internal Deadline	*You can figure that one out!*

Financial Analysis

The Financial Analysis view provides a financial summary of the job.

If the job was quoted it will show the quoted income, cost and profit.

As the job progresses you will see current income and current costs. The difference between the two we call “Profit in Progress”.

Profit in progress comes with some health warnings. If the job is progressing normally then the profit in progress figure gives you a reasonable idea of how much money you have made to date.

If the job is not progressing normally – it is heavily over running for example – please bear in mind that the Profit in Progress number could be misleading. This is due to the fact that if the job continues to over run then the profit earned to date could be eroded as the over runs continue to mount – so a profit now could turn into a loss further down the line.

Adding Items to your Job

A job comprises a series of tasks, purchases and expenses.

Tasks are optionally grouped by Stage. This is useful for larger jobs where a flat task list would result in an overly long task list.

Stage
- Task
- Task
- Task

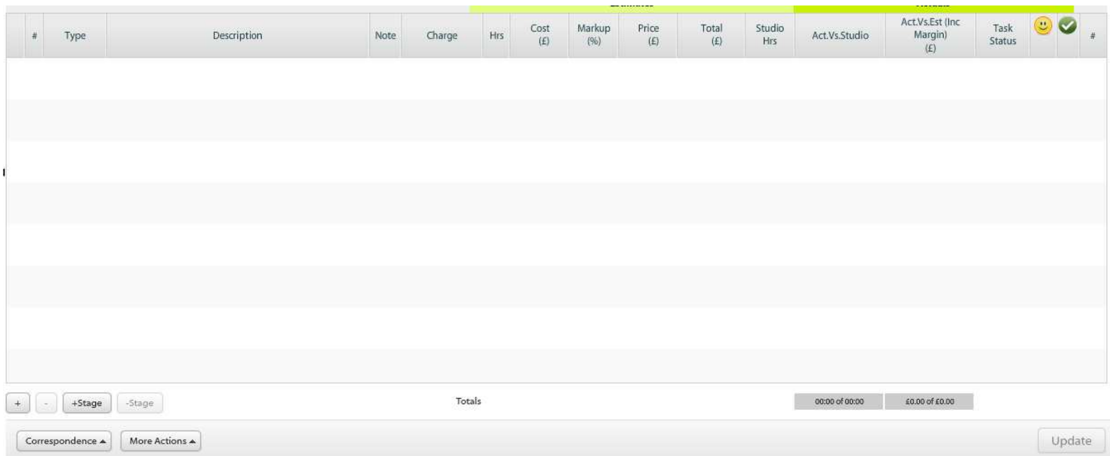
Stage
- Task
- Task
- Task

The stage simply groups together and summarises the contents of the tasks. The stage itself has little in the way of “attributes” other than stage notes, and is merely a sum of its component tasks.

Adding Stages and Tasks

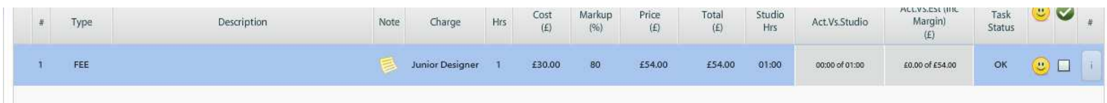
Please note : this section is seeking to describe in words dragging and dropping items around a grid. Lets be honest – this is a challenge. Please play – we have designed the interaction to be as intuitive as we can and words do not necessarily do it justice and risk making something simple quite complex!

The job grid starts out empty unless populated form a template or by transitioning a quote to a job – see below.



To add Tasks to the Job either

- Double Click the grid
- Click the "+" at the bottom of the grid



To add a Stage Click the “+ Stage” button

The above screen shot shows A task followed by a Stage. The stage currently has no tasks within it – hence the blank numbers

To enter a Task into a Stage

1. Create a task
2. Click and “Drag” it in to the Stage (Drag to the middle of the stage and you will see a green line appear, then drop)

Once you have a task in a Stage, double-clicking the left hand side of the Task (where the number is) will add another task within the stage

Double clicking the left hand side of the Stage will give you another stage

Double clicking the grid where there is neither a task of stage will give you a new task BUT this task will be “orphaned” – ie not a member of a stage. If this is not what you require you can drag the stage into any task.

To change the order of the tasks click on the left hand side of the item you wish to re-order and simply drag and drop.

Tip : Stages only hold workflow items, Purchases and Expenses are outside of the stage structure.

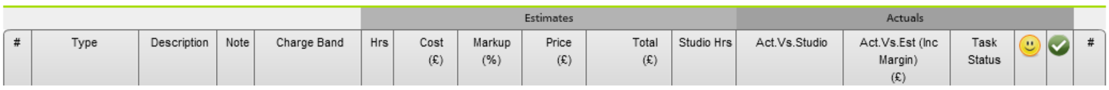
To add line items to the Job Purchase and Expense tab

- double click in the Jobs grid
- click the “+” button at the bottom of the grid

A line will add to the grid and you can commence constructing your Job

Time

The time section holds details of anything that you want a person to do. It comprises Time, Fees and Milestones.



The Job items are as follows

#	*This is the line number. Its purpose is to make referring to lines simpler*
Type	*Each Time line is assigned one of3 types* *Fee* *Time* *Milestone* *Both fee and time relate to jobs you are*

going to do in the studio that take time. The only difference is how the system will bill the line.

Fee – The system will bill the amount estimated regardless of the time you spend. This is how the majority of businesses Job / bill.

Example – You estimate a piece of work will take 10 hours @ £100 – a total of £1000. The system will bill £1000 (unless overridden) regardless of if you log 5 hours or 25 hours.

Time – The system will bill for the time spent.

Example – You Job 5 hours @ £100 per hour for amends. If you spend 2 hours the system will bill 2 hours, spend 10 hours the system will bill 10 hours

Purchase – Something you are buying in – print for example

Expense – Expenses you may incur such as travel, accommodation and so on.

Description	*Detail of the item*
Note	*Item Notes. Clicking on the icon will open*

	the notes dialogue. If notes have been typed in the notes icon will turn green
Charge Band	*The charge band tells Traffic what the activity is and provides defaults as to cost and mark-up information* *There are three types of charge band, one for Fee / Time, one for Purchases and one for Expenses.* *The charge bands are set by your system administrator in Admin.* *Tip – It is important you select the correct charge band and do not simply use the override features (see below). Traffic auto schedules jobs to people with required skill sets and if activities are not correctly classified auto scheduling will be misleading.* *Clicking on the Charge Band will turn the box to a drop down and allow the appropriate band to be selected.* *Upon selection the default values set against that charge band will load into cost, markup and rate. All items have a default quantity of 1.*
Hrs	*Number of hours*

	Entering a value here will force an update of Studio Hours to the same value. Please see below.
	If the time on the task exceeds the hours sold the box will highlight red to warn you.
Cost	*The cost to the business of the item.*
	This will be drawn from the charge band, but can be over typed.
	For labour the cost should represent a typical cost for the service. The system will know when the work is actually done who is doing it and hence its true costs, but at this stage no one is allocated to the work – we are simply quoting.
	Tip : If you know that the "typical cost" will be wring as you are going to need to employs a freelancer for example, override the costing
Markup	*The mark-up on the cost. You can over write this value.*
Price	*The cost plus the mark-up. In essence the selling price per unit of the service.*
	You can over ride this figure, in which case

the margin will update automatically.

Total	*The total charge (quantity * rate)* *You can over ride this figure in which case the rate and margin will adjust automatically.*
Studio Hours	*Studio Hours are the hours you have chosen to allocate to the Studio for the task. You can allocate the studio less time (you want to pad the hours) or more time (the job has gone wrong and it needs to be re-baselined)* *Studio Hours is the value seen by the rest of the system users other than those with access to this view.* *Tip : If a job is going wrong it is strongly recommended that you re-baseline the studio hours. This lets you schedule more time and takes the job off exception lists. The job has gone wrong – talk about it once, give it more resource and move on. There is no point in highlighting it every day. It will only make you miserable!* *If the job is over its sold hours the "Hrs" box will be red, so you still have visibility that the job is in difficulty.*

Act Vs Studio	*This shows actual hours worked compared too the studio hours.* *This is a progress bar, and will turn red if the hours are exceeded.*
Act vs Est (In Margin)	*This shows the actual cost of time recorded vs the estimated price to your client.* *Both figures INCLUDE margin so you are comparing like with like.* *This is a progress bar, and will turn red if the cost exceeds the estimate*
Task Status	*Clicking on this grid item shows a dropdown. You can select a status for every task.* *These statuses are set by your System Administrator.* *This allows you to track individual tasks – for example, With Client, On Hold, in QA etc.*
Happy Rating	*There are three possible happy ratings, Happy, Sad and Complete.* *Multiple people can be allocated to a Task. As such the Happy Rating follows rules.*

If all people are Happy, the Task is Happy
If any one person is Sad, the Task is Sad
If all people state they are complete, the task is complete.

You can see the detail of who is happy, unhappy in Job Schedule.

The complete rating is the opinion of the person allocated the work. It DOES NOT mean the task is complete. This is the decision of the Job owner.

See next column

Tick	*This is the task complete column. Checking the check box indicates that the task is complete.*
i	*i is for information.*
	Clicking i will open a dialogue that will show you details of all the time sheets logged against the task and their status (signed off or not – for details of how to sign off time see Manage Studio, Timesheets).
	You can choose to step through the tasks by clicking on Prev / Next.

Purchases

Purchases holds together anything that you are ordering for a job.

You can see summaries of issued Purchase Orders and their status in Manage Studio, Purchasing

Purchases allows you to record the order, issue a PO, track delivery dates, differentiate between what you estimated, the order you placed and what it finally cost. Additionally you can track supplier payment.

The Purchase items are as follows

					Estimates					Actuals		
#	Description	Note	Charge Band	Supplier	Qty	Cost (£)	Markup (%)	Price (£)	Total (£)	Order status	Due Date	Act.Vs.Est (£)

#

This is the line number. Its purpose is to make referring to lines simpler

Note

Item Notes. Clicking on the icon will open the notes dialogue. If notes have been typed in the notes icon will turn green

Charge Band

The charge band tells Traffic what the activity is and provides defaults as to cost and mark-up information

There are three types of charge band, one for Fee / Time, one for Purchases and one for Expenses.

The charge bands are set by your system administrator in Admin.

Clicking on the Charge Band will turn the box to a drop down and allow the appropriate band to be selected.

Upon selection the default values set against that charge band will load into cost, mark-up and rate. All items have a default quantity of 1.

Supplier	*The supplier of the goods. The supplier is updated in the purchased dialogue box – below.* *Suppliers must be entered into the Contacts section before they can be added.*
Qty	*Quantity of goods to be ordered*
Cost	*The cost to the business of the item.* *This will be drawn from the charge band, but can be over typed. For a Purchase the value would typically default to Zero, but you can price items that you order regularly from a know supplier – simple print, promotional items etc.*
Markup	*The mark-up on the cost. You can over write this value.*

Price	*The cost plus the mark-up. In essence the selling price per unit of the goods..* *You can over ride this figure, in which case the margin will update automatically.*
Total	*The total charge (quantity * rate)* *You can over ride this figure in which case the rate and margin will adjust automatically.*
Order Status	*Order status is selected in the Purchasing Dialogue –see below.* *A purchase has the following status's* - *Not ordered* - *Ordered* - *Partial Delivered* - *Delivered*
Due Date	*The order due date. This is set in the Purchase Dialogue – see below*
Act vs Est (Inc Margin)	*This shows the actual cost of the item purchased vs the estimated price to your client.* *The actual cost is set in the Purchase*

Dialogue.

Both figures INCLUDE margin so you are comparing like with like.

This is a progress bar, and will turn red if the cost exceeds the estimate

i	*i is for information, and this opens the Manage Purchase dialogue.*
	This is further explained below.

Manage Purchase

This section has been superseded as Purchases now has its own tab and broad functionality.

Please see support.sohnar.com

Expenses

Expenses records expenses!

It differs from Time and Purchases in that expenses do not need to be estimated, or added to this view to show here.

Users can add expenses to jobs regardless of whether they were estimated or not. You can make the decision to bill the expenses on at a later date. Expenses are added in My Traffic / My Calendar.

Expenses added that have not been estimated will show an estimated value of zero. The mark-up on these expenses will be automatically pulled from the Change Band relating to the expense type.

#	Description	Note	Charge Band	Qty	Cost (£)	Markup (%)	Price (£)	Total (£)	Act.Vs.Est (£)	#

Removing Items from your Job

To remove a task, select it and click “-“ at the foot of the grids.

To remove a Stage click “- Stage”. The delete stage button will only enable if the stage can be deleted. Stages must be empty of all tasks before deletion can occur.

Re-ordering your Job Items

If you want to re order your Job items in any view simply select the line, drag it with you mouse and drop it where required.

Saving a Job

Click “Update”

Job Numbering

Once you save your Job it is allocated a Job number.

The Job number is made up of a prefix followed by a Sequential number.

The prefix and your choice where the sequential numbering sequence commences is set by your system administrator in admin.

The default Job prefix is J and the default number sequence commences at 1.

Tip: You may want to consider changing your prefix annually to make it clear when the Job was issued. For example in 2011 your prefix could be "2011:". Consider that the longer the prefix and the higher the number sequence the more likely the field is to truncate. Jobs2011:1022200 is probably not advisable.

Amending a Job

You can amend a Job by opening it, making your changes and clicking Update.

Retrospectively Adding a Quote to a Job

Agencies often start work on a job before issuing a quote.

If the job has no quote then the Create Quote button

Will be enabled.

Clicking Create Quote will create a quote for the client with the same line items as the job, connected to the job with the same job name and other meta information.

This function creates a blank quote allowing you to select what it says in terms of line items.

Deleting a Job

Click More Actions / Delete Job.

You will only be able to delete a job if that job is empty – ie no tasks / purchases.

Creating Jobs from Templates

To save constructing Jobs manually you can create and use libraries of Jobs.

Job libraries are public, hence any changes impact the templates seen by all users.

Tip : The folder structure for Job templates is shared with Quote Templates. If you see what seems to be an empty folder there is probably a Quote template in that folder which is not visible in the Jobs view.

Creating Template Libraries

This function is permission controlled. If you cannot add templates contact your system administrator.

In Jobs :-

- Open the Template expander by clicking the “>” to the right of the Templates title
- Click “Add Folder”
- Enter your choice of folder name
- Click “Save”

Your folder will appear in the Template tree.

You can add nested folders by selecting an existing folder and following the process above.

Adding Templates to the Library

To add a template to the library

- Open the Templates expander
- Navigate using the upper tree to the Job use wish to convert into a template
- Click and Hold on the Job, drag it down to the required template folder and release your mouse button.

Tip : When the mouse is correctly positioned over a folder you will see a “+” sign

The Job will now be a template.

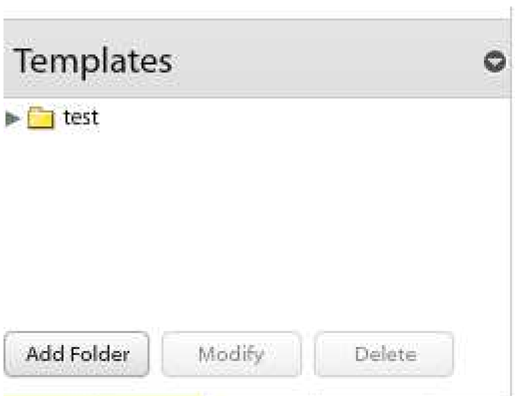
Using a Template

To use a template

- You must first open a Job. This can be an existing Job, or a new Job (Select client / project and click " Add Job")
- Open the Template expander
- Select the Job template required, click and hold your mouse and drag the template into the white space at the bottom of the Jobs grid or simply double click the template name
- Release your mouse button
- You will be prompted to either replace the current Job or append the template to the end of the Job.
- Click "OK" and the template will be applied to the Job

Tip : The template only populates the Job Grid. The header information (job name and so on) is not populated from the template and must be completed in the normal way.

Deleting a template / modifying its name



Modifying and deleting a template is controlled by permissions. If you cannot access these functions, please ask your system administrator.

To change the name of a template, select the template, click modify, enter the next details and click SAVE.

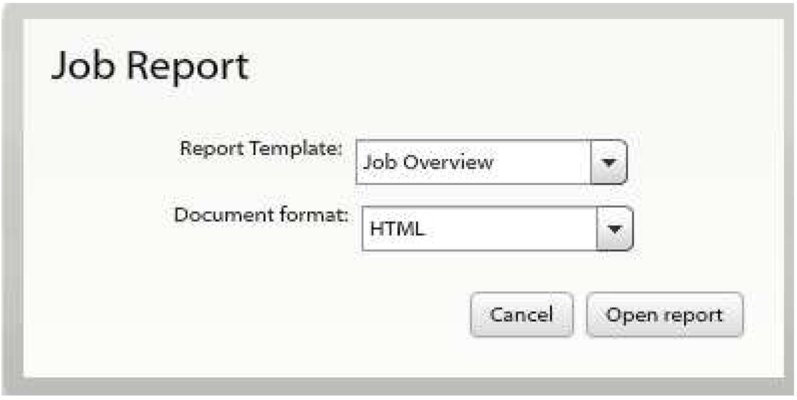
You can delete a template or template folder by selecting it and clicking on delete.

A folder must be empty before you can delete it – so you will need to delete all its contents first. The template "file" structure is shared with Quotes, so if you cannot delete a folder you will probably find that there are quote templates in the folders.

Job Reports / Outputs

Your system administrator can set up custom reports in Admin. To access these reports click

Select Job Reports



There are two sample reports in the system by default.

These are only samples to show what is possible. You can amend these / create you own in Admin.

Job Overview

Shows a summary of all aspects of the job.

Job Number:	J141	**Deadline Date:**	1/12/2011
Client:	Aardvark Services	**System Status:**	PROGRESS
Project:	2009 Jobs	**Our Status:**	FOR APPROVAL
Job Name:	Disney Club House	**Account Manager:**	Jeremy Rudge
Client Contact:	Isobel Campbell	**Rate Card:**	Discount rate
Client PO amount:		**Related Quote:**	N/A
Client PO Ref:			

Time

Type	Description	Chargeband	Est Hours	Rate	Studio Hrs	Actual Hrs	% Est Hrs	% Studio Hrs	Act Income	Est Income	Due Date	Happy	Completed
FEE	**Design**	Artwork	7:00	80.00	7:00	0:00	0%	0%	0.00	560.00	29/11/2011		
FEE	**Build**	Artwork	12:00	80.00	12:00	0:00	0%	0%	0.00	960.00	1/12/2011		
MILESTONE	**Client Review**		0:00	0.00	0:00	0:00	N/A	N/A	0.00	0.00	1/12/2011		
FEE	**test**	Artwork	6:00	80.00	6:00	0:00	0%	0%	0.00	480.00	1/12/2011		
MILESTONE	**Client approval**		0:00	0.00	0:00	0:00	N/A	N/A	0.00	0.00	1/12/2011		
			25:00		**25:00**	**0:00**			**0.00**	**2000.00**			

Purchases

Description	Chargeband	Supplier	Est Amount	Order Amount	Actual Amount	Order Status	Due Date
			0.00	**0.00**	**0.00**		

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Client Schedule

Shows a summary of the Schedule

Job Number:	J141	**Deadline Date:**	1/12/2011
Client:	Aardvark Services	**Account Manager:**	Jeremy Rudge
Project:	2009 Jobs	**Related Quote:**	N/A
Job Name:	Disney Club House	**Client PO amount:**	
Client Contact:	Isobel Campbell	**Client PO Ref:**	

Client Schedule

Description	Est Hours	Start Date	Due Date
Design	7:00	28/11/2011	29/11/2011
Build	12:00	29/11/2011	1/12/2011
Client Review	0:00	1/12/2011	1/12/2011
test	6:00	1/12/2011	1/12/2011
Client approval	0:00	1/12/2011	1/12/2011
	25:00		

Billing / Invoicing

Traffic LIVE allows you to invoice your clients. The system will allocate an invoice number, and create the invoice using the Invoice Template. You can then create a PDF from this and send it to your client.

Traffic LIVE also supports raising invoices in a foreign currency.

Traffic LIVE maintains an invoicing history which can then be exported. This export can be used to import into accounting packages, including Sage Line 50, MYOB (Australian Versions), Quickbooks and others.

The Invoice Template can be customised – please see the section on “Creating Custom Outputs” – and you can hold multiple invoice templates letting you invoice certain clients / activities in different ways, with different terms and conditions and so on.

Explanation of Fields

Line Type — The type of service as set in the Time / Purchase or Expense tabs

Billing Type — There are three possible billing types

- Actual
  The line is billed in accordance with the amount of work done or for purchases and expenses the true purchase price plus the mark-up

- Estimate
  The line is billed to the estimated costs

regardless of the true amount of work done or costs incurred

- Non Billed

The line is non-billable

The billing type is set automatically by the system, but can be over ridden if required.

Time - Actual
Fee - Estimate
Purchase - Actual
Expenses – Actual

Description	Description of the line as entered in Time / Purchases or Expenses
Note	The line notes
Cost	This is the cost of the line.

Time & Fee – the actual cost of people who worked on the job. Each person has an hourly cost set by your System Administrator in Admin.

Tip : This figure will almost certainly differ from the estimated cost as it reflects the true cost of work done taking into account the cost of the people that worked on it

Purchase & Expenses – the cost without

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mark-up of the purchase.

Actual vs Estimate	The actual cost plus mark-up compared to the estimated value including mark-up.
Suggested Line Value	The amount Traffic believes should be billable taking into account the Billing Type set and the numbers recorded. All things being equal this will be the amount you chose to bill, however you may choose to bill a differing amount to take into account scope creep, to recognise that you got a particularly good deal on a purchase and so on.
Billed to date	The amount of money already billed on this line
Suggested Bill	The suggested line value LESS the Billed to date value. This value can be negative if you have billed the job in advance / billed more than the value of work done.
>	Clicking the arrow will copy the Suggested Bill to the To Bill column
%v	Column header ontop of the “>” column allowing you to bulk bill. Further explanation below.
To Bill	The amount you have chosen to bill. This value can be overtyped as required.

Tax1	The tax rate to be applied to this line. Tax rates are set by your system administrator in admin.
Tax 1 Amount	The amount of tax for Tax 1
Tax2	The second tax rate to be applied to this line. Note : this will only show if your System Administrator has set your system to deal with two tax rates
Tax 2 Amount	The amount of tax for Tax 2. Note : this will only show if your System Administrator has set your system to deal with two tax rates
Total	The total of the To Bill and Tax amounts.
	ADDITIONAL COLUMNS WILL DISPLAY IN CURRENCY MODE
Billed to date (currency symbol)	The Value in currency billed to the client to date.
To Bill (currency symbol)	The currency equivalent of the base currency amount left to bill
Tax	The tax 1 amount calculated using a

1(Currency Symbol)	percentage of the currency amount billable Tip : There are exceptions, but generally if you are based in one country and selling to another sales tax would be set to nil. This is only a tip, and there are many exceptions!
Tax 2 (currency symbol)	The tax 2 amount calculated using a percentage of the currency amount billable (only shows if the system is set to use 2 tax rates)
Total (currency symbol)	The total in currency of the to bill amount + tax 1 and tax 2 (if tax 2 applicable)

Invoicing Process

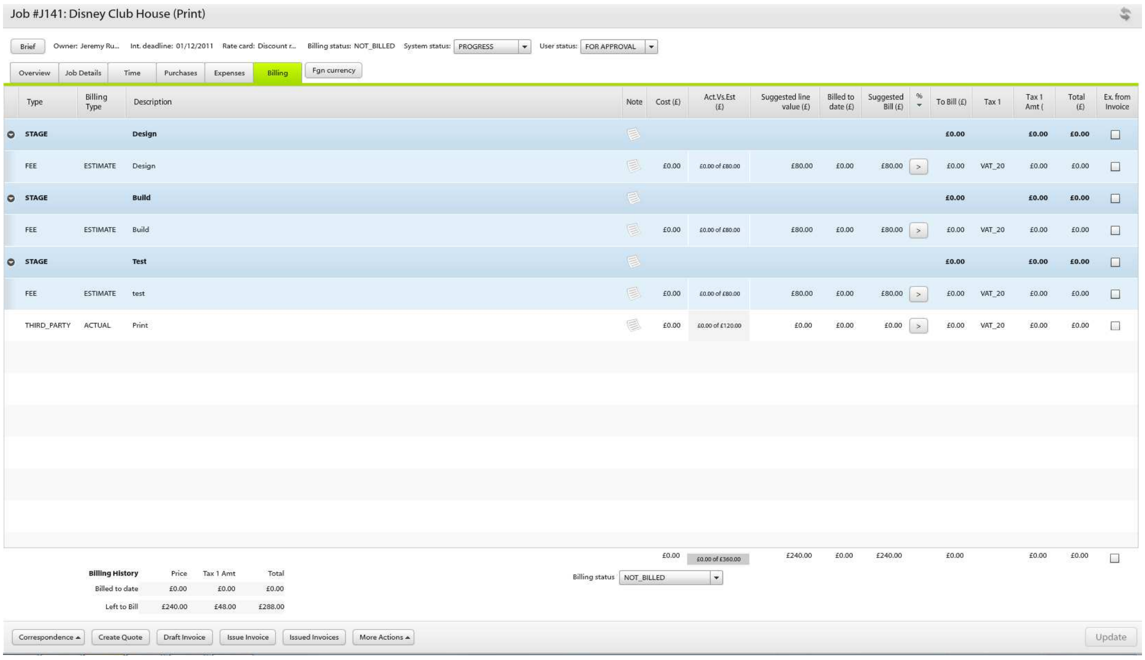
The process followed to bill a job is

- to prepare your job for billing
- if required to produce a Draft Invoice for checking
- to issue the invoice
- to amend the Billing Status if the job is fully billed

You can bill in advance, part bill, bill multiple times and so on.

Preparing the job for billing

Enter the job and select the Billing tab.



The system makes suggestions as to how much you should bill based on the line type, which in turn drives the default values of the billing type.

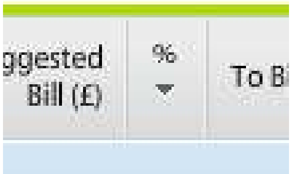
Types TIME, 3rd Party and Expenses will by default suggest you bill to ACTUAL, fees will suggest you bill to ESTIMATE.

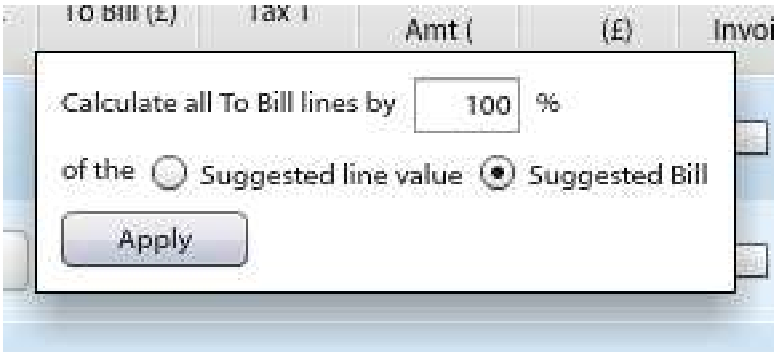
If you disagree with these assumptions simply change the billing type for the line.

The Suggested Line Value will show you what the activity should be billed at given the assumptions made. From this will be deducted any amounts billed to date to arrive at a suggested amount to bill.

If you agree with this assumption click “>” and the amount will be carried over into the “To Bill” column.

To Bill all lines to a certain Percentage click





You can then bill all lines to your required percentage.

You can choose to bill to the Suggested Line Value or the suggested bill (line value less billed to date).

You might want to bill 50% of the suggested line value upfront and then 100% of the suggested bill once the job is complete.

If you “disagree” with any of the amounts and wish to bill a different amount simply type the value into the To Bill box. You can over bill or under bill. You are in control.

Tax is calculated by line item in accordance with the default settings set in admin by your system administrator. You can override them if required.

Finally, if you do not want any lines shown on the invoice – nil values for example – then check the box on the right to exclude them.

You will see the totals at the bottom of the screen.

Click Update

Important Note : Traffic LIVE allows you to mix tax types on an invoice. For this reason the tax is calculated by line item. For example in the UK a magazine is Zero rated, but the delivery of that Magazine would not be. In Australia most things are rated at 10% GST, but a filming permit for filming a street scene is Zero rated.

The calculation by line item can lead to circumstances where the total tax is rounded by line item and gives a total figure that seems to be wrong. It is however correct. The UK revenue guidelines on line item billing can be found here.

http://customs.hmrc.gov.uk/channelsPortalWebApp/channelsPortalWebApp.portal?_nfpb=true&_pageLabel=pageLibrary_ShowContent&id=HMCE_CL_001543&propertyType=document#P574_44405

It should be noted that the UK VAT rate is currently 20% and the Australian Rate 10% (makes you wonder doesn't it!) and with whole number tax amounts rounding in the manner described above is extremely rare.

Preparing a bill using descriptions other than those found in the Job line

Your Job will reflect your workflow. Depending on your billing style you may not wish to get this granular with your client.

If you wish your invoices to simply say “Design and Print of the brochure as per Quote 1234” rather than a blow by blow list of all activities undertaken

- Add a line / lines to the job with the description (s) you require.
- Set them to Zero hours, and do not schedule them to anyone
- In the billing tab exclude the other lines from the job
- Type in the value you wish to bill
- Click update

The bill you produce – see next section – will now simply show the new line item(s).

Preparing an invoice for printing

You can re-order the items on the invoice if you wish by dragging and dropping.

You are unable to move Tasks that are already within stages, but you can move whole stages.

What is printed on the invoice is controlled using the exclude from invoice function.

The default behaviour with no boxes checked is for

- All Stages to output
- Stages within tasks to NOT output
- Stand Alone Tasks / 3rd Party / Expenses to output

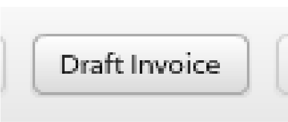
Items checked will be excluded as follows

- Check the Stage Line, but leave the tasks in the stage unchecked. The tasks will show on the invoice the stage will not
- Check one or more tasks, but don't check the stage. The invoice will show the stage but the value of tasks checked will be EXCLUDED from the quote
- check any item that is not a member of s Stage – it will be excluded.

Invoice Notes are unique to the Invoice they do not reflect Job Notes.

Producing a draft Invoice

If you wish to see what an invoice will look like pre issuing it click



Note: this option will only be enabled if the invoice has been updated. If the option is greyed out, click Update and try again.

You can select the invoice template, client mailing address and so on.

If you print to HMTL, then once the document is displayed in your browser you can print to PDF. On a MAC this is a built in function. On a PC there are a wide variety of "PDF Printers" available free of charge.

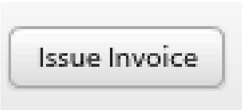
We use http://www.dopdf.com/ , but a search of Google for "pdf printer driver" will show many more options.

If you have installed Adobe Creative Suite then the Adobe PDF printer will most likely be installed already

A draft invoice is not saved by the system and does not have a number.

Issuing an Invoice

To issue an invoice click



And select the “Issue Invoice” option.

Note : this option will only be enabled if the invoice has been updated. If the option is greyed out, click Update.

Your system administrator can allocate you an invoice issuing limit. If the invoice exceeds this amount you will get a warning and will not be able to proceed.

Once an invoice has been issued

- it carries an issue date
- it is allocated an invoice number
- the details of the invoice are captured and retained by Traffic LIVE
- the job numbers at the bottom of the screen are updated
- the To Bill amounts are cleared back to zero in preparation for the next billing cycle

The process of printing and so on are similar those for a draft invoice – above – although you have some additional options that will allow you to amend the billing / job status at the point of issuing the bill.

Deleting Invoices

Once issued you cannot delete or cancel the invoice, you can however issue a credit note.

Billing a job in Foreign Currency

You can issue an invoice in a foreign currency.

It is important to note that the invoice will be accounted for in your system base currency. All reporting will show the base currency values. It is only the client invoice that exists in the foreign currency.

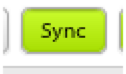
Click “Alt Currency” and the current dialogue will appear.

1. Select you currency
2. Get the rate

a. You can select the current rate – provided by Yahoo Money or;
b. Your company rate if your system administrator has provided a rate. If no company rate exists then the option is greyed out
c. If you prefer you can manually over type the rate in the rate box

3. Apply the rate by clicking the Apply button. You can choose to apply the rate
    a. To the selected line
    b. To all lines

You can then choose how the quote grid "behaves".



If "Sync" is enabled (green) then any changes you make to either the sterling or currency values will remain synchronised.

So for example if you have an exchange rate of GBP to AUD of 2, changing the GBP value to £100 would automatically change the AUD value to $200. Similarly changing the AUD value to 1000 would change the GBP value to 500.

This would be the behaviour you would typically expect, however you may choose to disable this function. In some circumstances. You may have an "odd" currency value AUD124.96 which you would prefer to express as AUD125.00 without changing the base currency. You could have a large 3rd party purchase and have for example purchased currency forward, and hence need to use a different rate.

Cols simply turns on or off the foreign currency columns. This may make the screen simpler to read if you no longer need to see the currency amounts.

When you output your quote Traffic LIVE will automatically pick up the foreign currency amounts.

Tip: Once the job has been billed once you can no longer change the currency

The method used by companies in determining which exchange rate to use for a given transaction varies. Some use real time rates, some a single rate for a time period – this could be as long as a year.

No method is right or wrong, as all billing in foreign currency exposes you to exchange rate variations unless your finance department use treasury instruments to manage this risk. These differences are then accounted for by your accounting system using "Gains and Losses on Foreign Exchange".

If using foreign currency billing please ensure you understand your companies policy.

Issuing an invoice in currency

Simply issue a draft or final invoice in the normal manner.

The values and currency symbols will change to the currency values as specified on the bill.

The invoice issue limit is linked to the base currency amount, so should you receive a limit warning you will need to ask someone with the appropriate permissions to issue the invoice.

Issuing a Credit Note

To issue a credit not in Traffic LIVE simply choose to bill negative numbers. An invoice for a negative amount will then be generated, and the billed job totals amended.

Important Note : You can choose to issue a mixed invoice in Traffic LIVE that bills say 3 line items and refunds another. An "invoice" prepared in this way will be rejected by our link to Sage. Sage can only process a credit note OR an invoice. It is likely that most accounting packages will take a similar view point.

"The Numbers" post issue of a invoice / credit note

At the bottom of the screen is a summary of the amount billed and still remaining.

Billing History	Price	Tax 1 Amt	Total
Billed to date	£1750.00	£350.00	£2100.00
Left to Bill	£2400.00	£480.00	£2880.00

If you bill a job in advance the Left to Bill numbers could – quite correctly – show a negative value as you have billed more than was available to bill at the time.

The financial numbers always reflect the job value in your base currency – not the currency amounts.

Billing Status

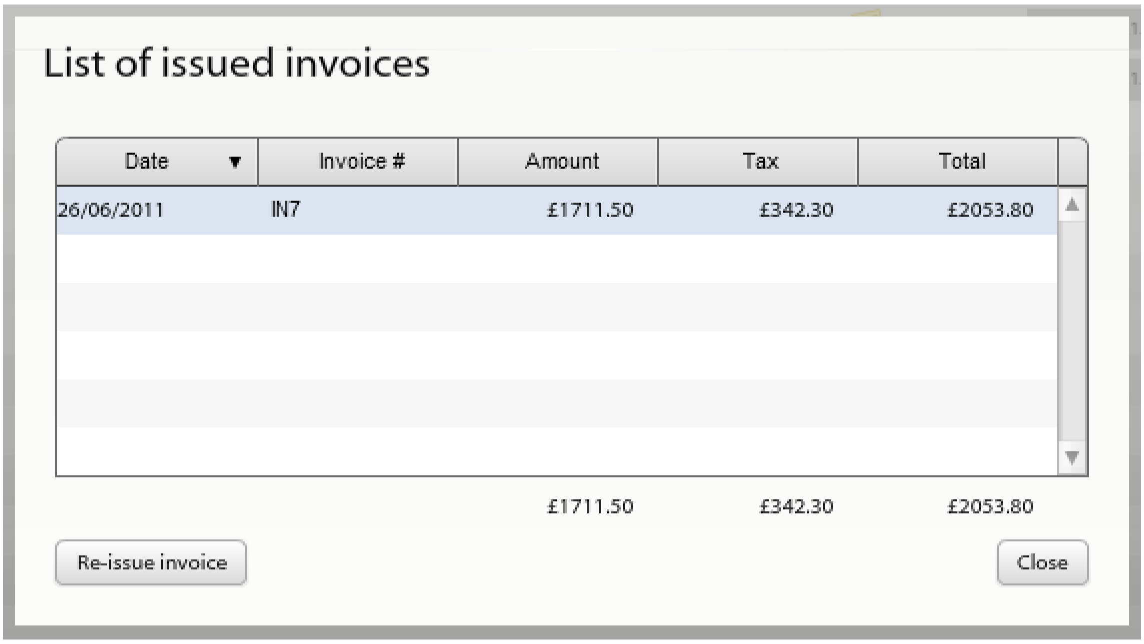
Finally you will need to update the billing status.

Traffic LIVE will force the billing status to "Part Billed" once any invoice has been issued. It has no way of knowing if you have part billed or fully billed a job. As such you must manually update the billing status once you have complete job billing.

The billing status not only tells another user the billing status of the job, but also over rides the profit calculation on the job – only when billing is complete do we really know how much money we have made.

Viewing Issued Invoices and reprinting

To see a summary of issues invoices click



You will see all issued invoices. Should you wish to reprint / reissue the invoice select it and click “Re-issue Invoice”.

Billing and Profit – Important Note

The only definitive way to measure profit on a job is once the amount billed has been confirmed.

Traffic at that point will know how much is coming in – the total of invoices – how much has gone out and the balance will be to profit or loss you have made.

The setting of the billing status to Billing Complete tells traffic that it can now calculate profit using this method.

If billing is not marked as complete Traffic will use a measure called Profit in Progress. Profit in Progress is a calculation based on what Traffic knows at a point in time – and makes assumptions that you will bill the job in line with its recommendations.

These are reasonable assumptions to make unless there is something odd about the job examples include the client not being billed for one reason or another, or the job running significantly over / under.

For accurate profit reporting it is hence **essential** that you correctly set the billing status.

Exporting Invoices

You can export invoices from Traffic LIVE.

We provide an adaptor to import data into Sage Line 50 and Quickbooks – see next section, and export formats to cater for MYOB Account Edge in both Service and Professional format. .

To export invoices select the Jobs tab and the Invoice Export sub tab.

Select the data to be loaded using the search criteria in the left hand panel and click search.

The screen will display every line item in every invoice meeting the search criteria. There is no invoice summary.

We have included in the export all information we hold about a line item. You may wish to use this to produce some bespoke reporting, or to import to an accounting package.

Click export in the bottom right hand side of the screen. The export dialogue will appear.

You can now make a number of selections.

Export Type

Standard

- Exports all fields we hold about an invoice. This is also the correct format to use when exporting to Sage Line 50 or Quickbooks.

Account Edge – Service

- This exports invoices in the format required by MYOB Account Edge – Australian Edition – Mac Account Edge V9

  MYOB supports two invoice layout types, service and professional. This export supports Service. The type of invoice layout you use will be known to the person running your MYOB package.

Account Edge – Professional

- This exports invoices in the format required by MYOB Account Edge – Australian Edition – Mac Account Edge V9

  MYOB supports two invoice layout types, service and professional. This export supports Professional. The type of invoice layout you use will be known to the person running your MYOB package.

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Setting up Traffic LIVE to work with Sage

PLEASE NOTE THIS SECTION REMAINS VALID, HOWEVER SUPPORT.SOHNAR.COM HAS DETAILS OF FULLY AUTOMATED SAGE POSTING.

Traffic LIVE will export the Sales Ledger into a format that can then be imported into Sage Line 50.

Sage Line 50 has a limitation than means it cannot natively import invoices by line item.

To overcome this limitation we use a program called Import Plus.

How Does it Work?

- you raise invoices through Traffic LIVE
- periodically (daily, weekly, monthly – you choose) you create an export file in Traffic LIVE
- this file contains details of your Sales Ledger
- the file in imported into Sage using Import Plus
- the sales ledger in Sage Line 50 is updated
- Import Plus will advise you of any errors that need correction

Three steps to Sage Integration

You need to

- Install Import Plus
- Configure the required fields in Traffic LIVE to match those in Sage
- Run a test

Tools you need for the job

Installing an configuring Import Plus is straightforward. You will need

- to be familiar with installing programs on Windows
- to have admin access to the machine you are installing it on
- have admin privileges to Traffic LIVE
- to know sufficient about Traffic LIVE to be able to issue a sample invoice – or to have on hand someone who does
- to know enough about Sage Line 50 to be able to confirm that what has left Traffic LIVE has arrived in Sage Line 50 – or to have on hand someone who does

Before you start

If you are planning on upgrading Sage Line 50, we recommend that this is undertaken before you install the link to Traffic LIVE.

Setting Up Import Plus

These instructions have been provided by the supplier of the Sage import utility.

Import plus is easy to install, however, there are quite a few steps and these need to be done in the right sequence, **skipping steps, and doing things out of sequence are the main problems**

1. Download the latest installation package for your version of Sage 50

- it is important that you use the right version of import plus for your installation of Sage 50
- the download page for import plus on the Skyewright website (the provider of this utility) is here

2. Run the installation package.

- If you are on a network, then you should do a server installation and then you can use the "workstation setup" application on the server to install to all the workstations.
- Install the application into a shared directory (we suggest you use the existing share for Sage 50, and make a folder called Skyewright in it, this is then accessible to all Sage users)
- once installed you can run the workstation setup program from the server on each workstation.
- If you have a non windows server (Linux, Mac, Novell, or a NAS) you can do a server install to the fileshare from the workstation, just select the path to the file share when you install.

- If you are a single user, then do a full install

3. Install your Sage 3rd Party Activation keys

- these are free of charge
- open Sage 50 and got to Tools>Activation>Enable 3rd Party Integration
- you need to telephone Sage to get your keys, the phone numbers are on the screen

4. Set your datapath, username and password

- In Basic mode, on the lower left of the screen, there is a box Titled Location. In this box you need to enter the path to your Sage data (including the accdata) You can find the current data path from in Sage Help>About>System Information>Directories>Data it can be hard to see it you can stretch the window box, hover over the path and the full path appears in the tool tip or right click on it and open the folder (these methods only work in some versions of Sage 50)
- When you have selected your datapath the name of your company should appear in the box labelled description.
- Enter a Sage 50 username in the Logon box (for production use it is best to have a dedicated username for importing eg "import")
- Enter the associated password in the password box, if there is one, you can have the password memorised, to do this go >Advanced>Connection>Remember Password (Tick Box)>Basic

5. Update your tools

- Open import plus (go to Basic mode if not already there)
- use the ... button next to location to browse to your sage data directory (ends in /accdata)
- You can find you sage datapath from your Sage package. It is in Help>About>System Information>Directories>Data Directory

- go to Tools>UpdateTools and run

6. Get your customisation updater

- Open import plus and (go to Basic mode if not already there)
- go to Tools>Collect and install customiser press Run
- enter your script code will be mih-traffic
- after installation of the cutomiser, you will have a new option in Tools "Update your customisers"

7. Update your customisers

- go to Tools>Update your customisers press Run
- you should now have additional section(s) for your customisers
- You can re run this option to update your installation with the latest changes made to your customiser.

8. Register your software and Request a Licence

- Open import plus (go to Basic mode if not already there)
- go to Tools>Request Licence and press run
- Fill in your details (accept the default licence options)

9. Everything will now work, however, there is a time limit of 14 days and some splashes can not be prevented, you will get an email when licensing is issued, you will probably get a provisional licence and then later on a full licence, each time you get a licence you need to

- Open import plus (go to Basic mode if not already there)
- go to Tools>Collect and Apply Licence and press run
- If for some reason the automatic licensing fails, you can enter the licence code from the email manually
- Open import plus (go to Basic mode if not already there)

go to Tools>Install Licence and press run

Dialogue Screen Size issue: when you open ImportPlus for the second time and It has it's customisation, the "operation" window may be very small, and it may be hard to see your customises. As there is no maximise button, you have drag the edges of the window to make it larger.

NOTES:

- The -feedback option is the path to the file where the results (in html) will be put, if you skip this a file will automatically still be created and a name generated automatically.
- The Password option contains the password in a hashed form, you can use the password in plain text if you want.

- The command lines can be very long and exceed the 255 character limit, you can work around this by putting the command in a batch file

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- Want to turn off the splash screen?
  add the option "nosplash" in the mode box
- Want to skip the listing screens when running
  add the option "nolist" in the mode box
- Want less feedback whilst running ?
  add the option "taciturn" in the mode box
- Want to not show the end result screen?
  add the option "qr" in the mode box
- Want to turn off **all** user interaction whilst running?
  add the option "tool" in the mode box
- Want to delay the showing of the progress bar
  add the option psd=xxxx where xxxx is the number of miliseconds delay you would like in the mode box
- Want to hide the progress bars
  add the option psd=-1 in the mode box
- Want to use a combination of modes?
  separate multiple modes with commas, "nosplash,qr"

Setting up Traffic LIVE

For invoices to flow between Traffic LIVE and Sage Line 50 information between the two systems needs to match so that Sage can understand what Traffic LIVE is sending over.

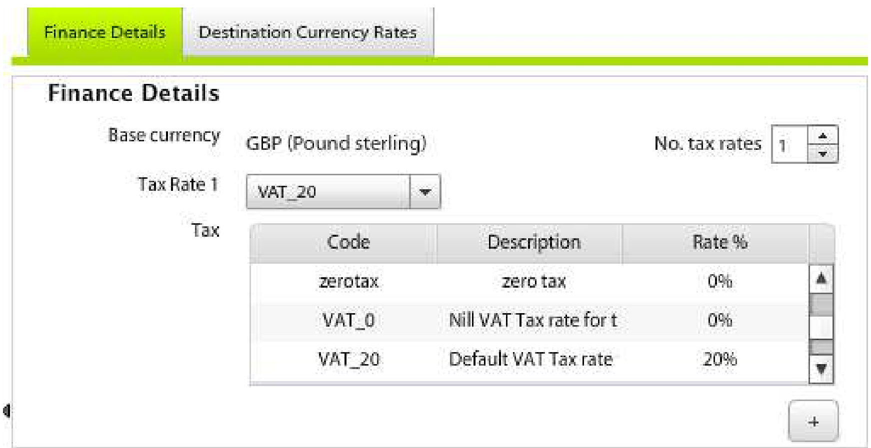
You need to configure three things in Traffic LIVE

1. Tax Types and Codes
2. Client Codes
3. Nominal Codes

Tax Types

To set Tax Types

- enter Admin
- select the "company management" tab
- Select "Configure Company Details" at the top of the left hand list
- You will see "Finance Details displayed on the screen



In the UK companies typically use upto four VAT rates

- Nil
- 0% (not the same thing ☺)
- 5% (certain lower rated items)
- 20%

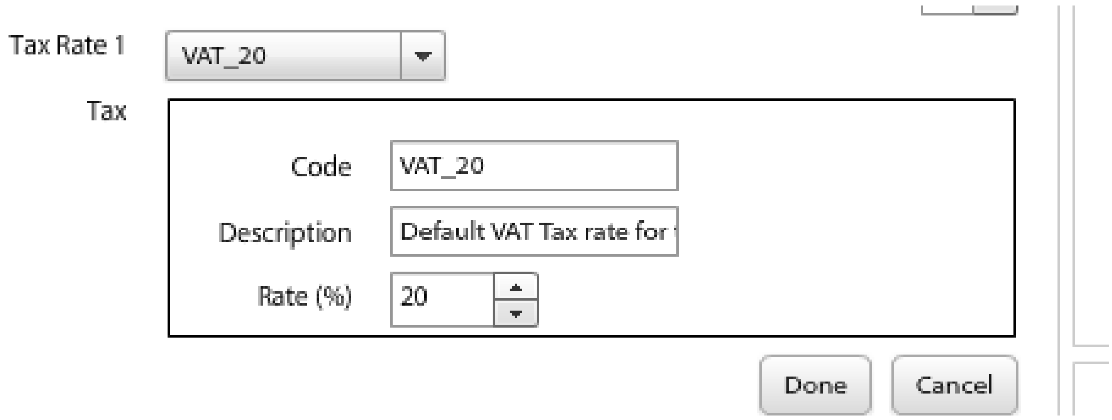
So that users do not become confused we recommend setting as few tax types as possible taking into account your business. For most this probably means 0% and 20%.

You need to liaise with your Sage administrator to determine the codes you are using in Sage to depict these rates.

It is likely that the 20% VAT rate will be known as T1 and the 0% T0 (but you may use T9). These can however vary – so please check.

Your system will probably have tax rates in it already.

To edit the tax code double click on the line item and the line item will open



Enter the code that matches Sage in the Code box.

Click Done.

Finally make sure that your default tax rate (probably 20% unless you do large amounts of non rated work) is selected as default.

The number of tax rates selector is use for countries with more than one sales tax rate per line item (Canada for example) and should be left set at 1.

Nominal Codes

Now move on to nominal codes.

Nominal codes marry up the type of activity you are undertaking in Traffic LIVE with the way your accounting system analyses its income.

Click “Chargebands”

Nominal codes are entered in the “External Code” column. We do not use the term nominal explicitly as these fields are used by different clients integrating with different systems in different ways.

For each activity enter the relevant nominal code.

Income lines in Sage typically start at 4000 so you should be expecting numbers like 4010 4020 and so on. Your system could be different.

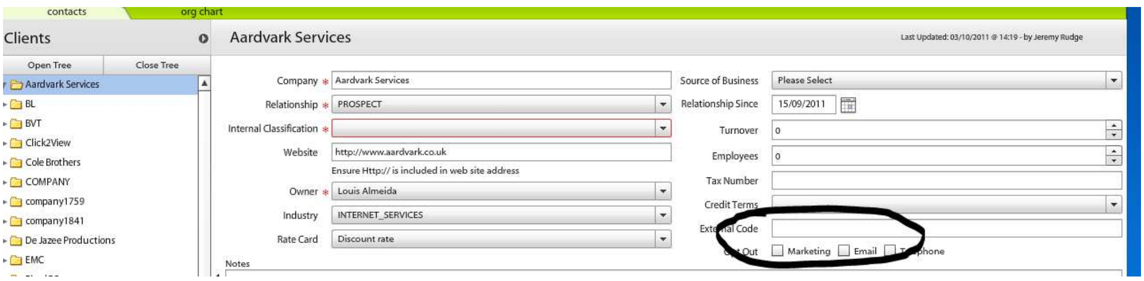
Some agencies use dozens of nominal’s, some a handful. If you have lots of nominals and think you are looking to consolidate, then you should do this before setting up the codes in Traffic LIVE.

Client Codes

Finally you need to enter Client codes.

Navigate to Contacts, and for each client

1. Select the client
2. Click Edit



You will see the screen above.

Enter the Sage client code in the External code box and click Update.

Sage typically generates the client codes for you. Sohnar Ltd for example would probably by SOHN01 in Sage.

Testing

This section assumes you know how to use Traffic LIVE – if not the user guide can assist

You are now ready to run a test and we recommend you involve someone who understands Sage Line 50.

1. Create a test job for a suitable test entity. Your book keeper / FD will advise if this is a test company or a real company.

2. This job should carry maybe 3 or 4 line items. We suggest that the values are low so that your books are subject to minimal distortion

3. Enter Add / Edit Job / Billing and Bill the Job

4. Print out a copy of the invoice so you know what you are checking it against

5. Enter Job Add / Edit – Invoice Export

6. Make sure that the date range at the bottom of the screen coveres the date range you issued the invoice for

7. Filter the list using the filters on the left so that only the invoice you have just raised is shown

8. Click "Export"

9. Make selections as below

10. Your file will now be generated

11. Using details in the Import Plus Section of this guide import the file into Sage.

12. Confirm that what has arrived in Sage matches what has left Traffic.

13. Clean up!

- In traffic LIVE you can bill the job you just created with a negative amount to credit out the transaction
- In Sage ask your book keeper / FD. You can either credit out the invoice or enter the audit trail and delete the transiaction.

What can go Wrong?

The main thing that can “go wrong” is the codes in Traffic LIVE and Sage not agreeing – either due to an input error or due to a new client being added in Sage for example, but the code not being added in Traffic LIVE.

Quickbooks

To import data into Quickbooks we use a product called Transaction Pro.

http://www.baystateconsulting.com/products.htm

This must be bought directly from the link above.

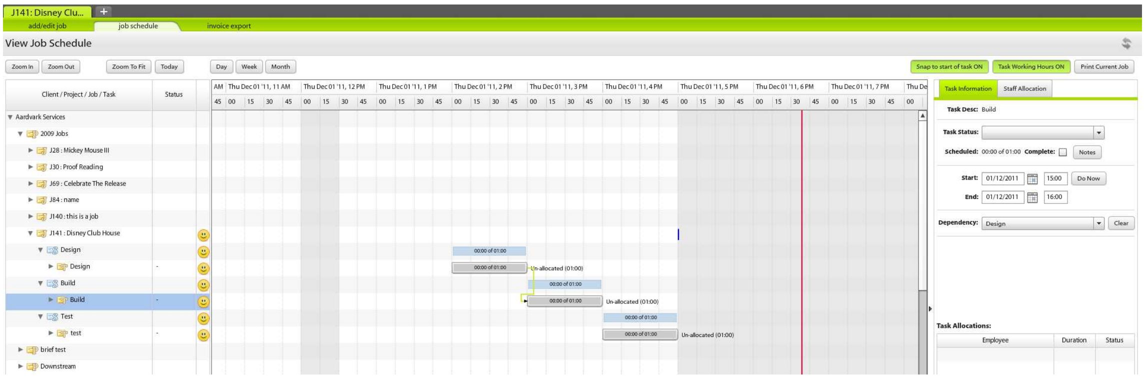
We provide a mapping file that maps the Standard invoice export to Quickbooks in the Transaction Pro product.

The most recent version of this will be found on the support.sohnar.com web site.

The instructions for setting up Traffic and testing are as per Sage above.

Job Schedule

Job Schedule allows you to schedule jobs and allocate people to do the work.



The interface allows you to simply drag and drop resources, as well as move deadlines, set dependencies and so on.

Resourcing is made simple as the system will always recommend the most suitable person who is most available to perform a given task. It you have teams of people that work on given accounts you can view the most appropriate team.

Scheduling takes into account your working day, lunchtimes, weekends, public holidays and company away days.

Tip: Take time to understand scheduling. There are several modes of operation which range from heavily automated to giving you total flexibility. These are your friends – you just need to get to know them!

Tip: Scheduling is a bit like an onion – you can keep peeling back the layers. Several of these layers are there to help you answer specific questions – learn one layer before looking to peel back the next.

The Scheduling View

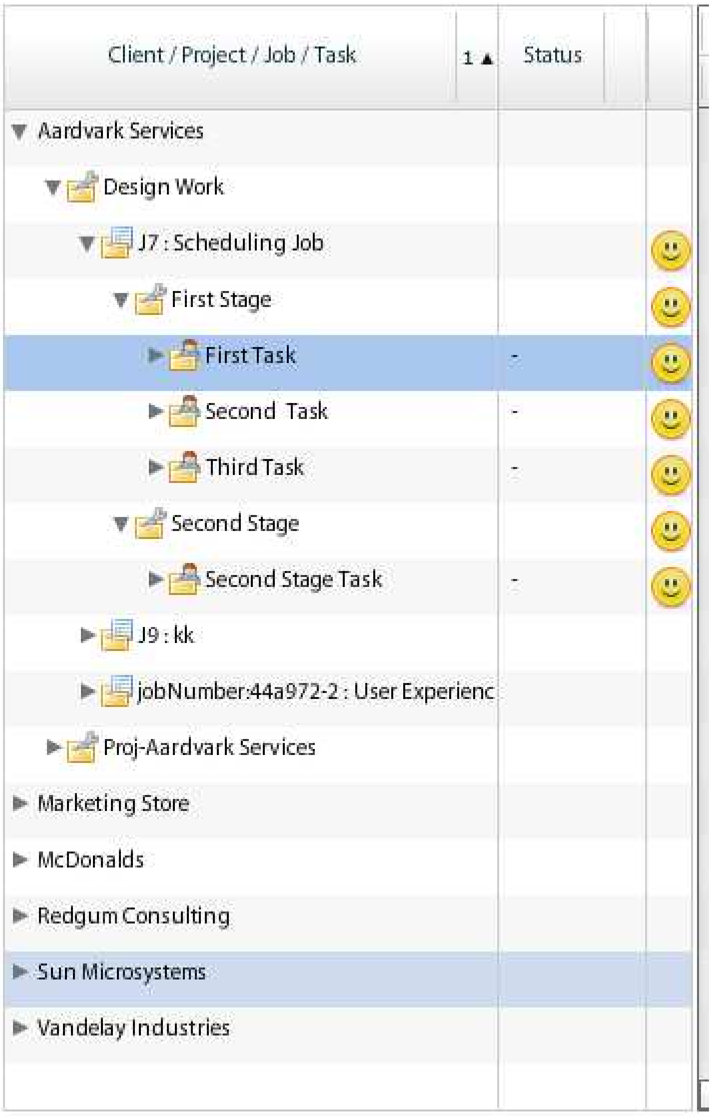
The scheduling view is made of four principal areas

Top Of screen

The top of the screen controls the view

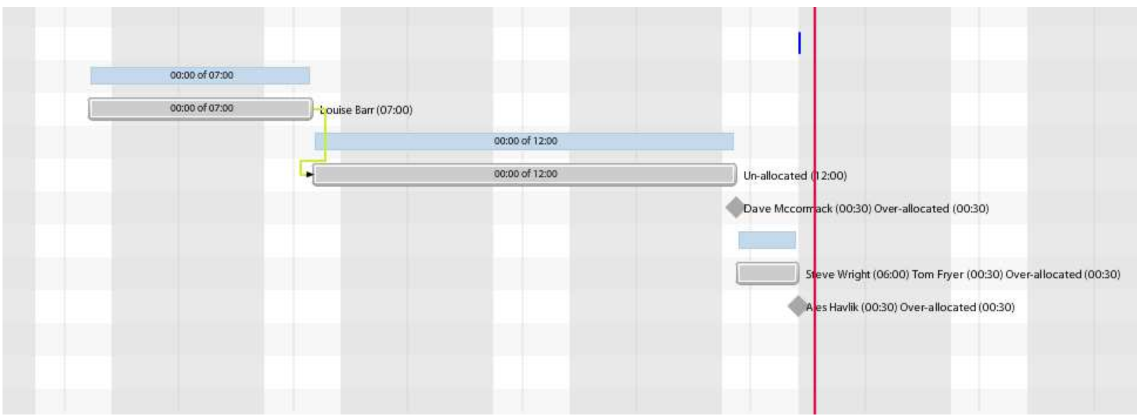
Left Pane

Allows you to select the client, project, job you wish to schedule and to drill down further to see Stage, Task, people working on jobs and the proposed working hours.

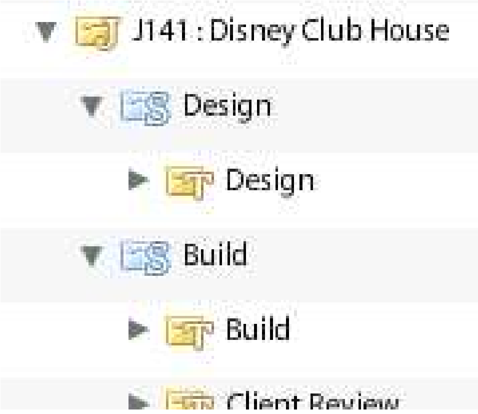


Middle Pane

The main drag and drop scheduling view

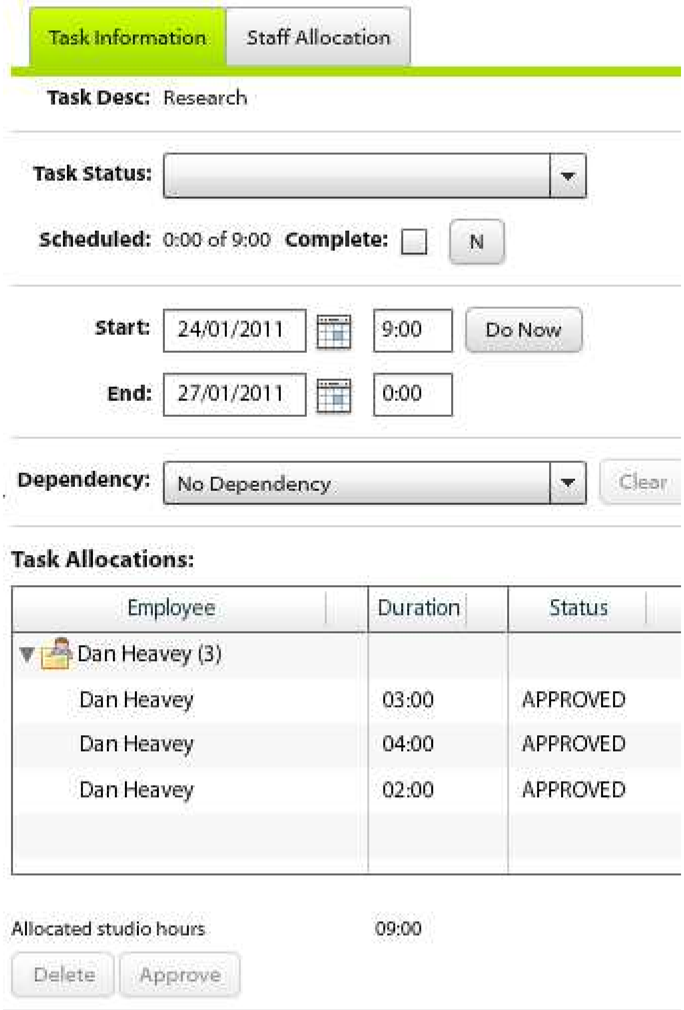


Stages (if used) are shown in Blue in both the body of the Gantt chart and the left hand tree.



Right Pane

Provides information relating to the selected item in the left tree.



Selecting a Job

To select a job using the left hand tree by clicking the client, project and then the job.

Clicking on the job loads the job from the server, so you should expect a short delay of maybe a second whilst the job loads. During this time you will see the hourglass symbol in place of your cursor.

Click on the job again to open the tree further to see the stages (if you have any) and tasks of the job.

What you see will depend upon the date range of the job selected relative to the date range already being displayed in the scheduling view.

Double clicking on the job will automatically zoom the view to show the entire job. Double clicking on a stage will zoom the view to the stage and so on. Alternatively you can zoom manually using the controls at the top of the screen.

Scheduling Bars Explained

At this point you will see a series of bars in the scheduling view representing the stages (if used) and tasks of your job.

The tasks are all set to end on the Internal Deadline of the job, and the length of each bar corresponds to the number of hours in that task. At this point the bars have not been corrected to allow for working hours, weekends etc. This is so that as you start to schedule you can see the relative size of the tasks.

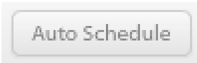
At the end of each bar you will see the names of the people allocated to the task and the hours scheduled to them. The last label is always the extent to which the task is under or over allocated.

Scheduling Tasks

You can schedule tasks either automatically or manually or with some automatic assistance.

Automatically

Click “Auto Schedule” at the bottom of the screen.



The tasks will be scheduled backwards from the internal deadline date. As each task ends, the next task will start.

In scheduling the system will automatically schedule the start and end times of the scheduling bars to take into account

- avoiding weekends (by default weekends are Saturday and Sunday, but can be changed in Admin)
- your start of working day and end of working day (set by your System Administrator in Admin)
- lunchtime (again, set by your System Administrator/ Lunchtime can be disabled)
- Public holidays and company away days set by the half day – for example if you only work half day on

As such the length of the bar will always be the correct number of *working* hours in length.

Example

assume Saturday and Sunday are non working days. That the agency starts at 9am and finished at 5pm with 1 hour for lunch from 12:00 to 1:00 pm.

A 5 hours task starting at 4pm on a Friday would end at 2pm on Monday.

4-5pm on Friday
[weekend]
9-12 on Monday
[lunch]
1-2 on Monday

Manually

You can manually move the bars simply be placing your mouse on the bar, click and hold and move the bar as you choose.

You can also change the length of the bar by clicking and holding your mouse over the ends of the bars and then move to stretch or shrink.

Changing the length of the bar does NOT change the number of hours allocated, it merely changes the physical time available for the task to be accomplished.

Tip : You would use this function if for example you were scheduling 2 people to work simultaneously on a 20 hour task. You may want then to do 10 hours each so you could then shrink the bar.

Semi Automatically

At the top of the screen is a button “working hours on”. Click this and it will turn green.

If you now move the bars they will automatically shrink and contract to be the correct length in working hours taking into account weekends, working times and lunchtimes as described above.

Using a combination of these modes you can schedule quickly, but always remain in control.

If you do something unintended click cancel.

Applying People to Tasks

Click on the task you wish to schedule.

The right hand pane will show details about the task.

Click on “Staff Allocation” tab and the view will change to show all members of your team.

At the top of the screen is the ability to select “all” or “suitable”.

All

All will show all staff members in the system, allowing you to schedule anyone to any activity.

Suitable

Suitable will show you only people who have the skills to do the work.

How does it do this?

Every activity in Traffic is allocated a “Charge Band”. This tells the system what the activity is, how much to charge for it etc.

In Admin your System Administrator has the ability to allocate one or more charge bands to people.

Selecting Suitable will match the charge band of the task you are undertaking to the charge bands allocated to your team members.

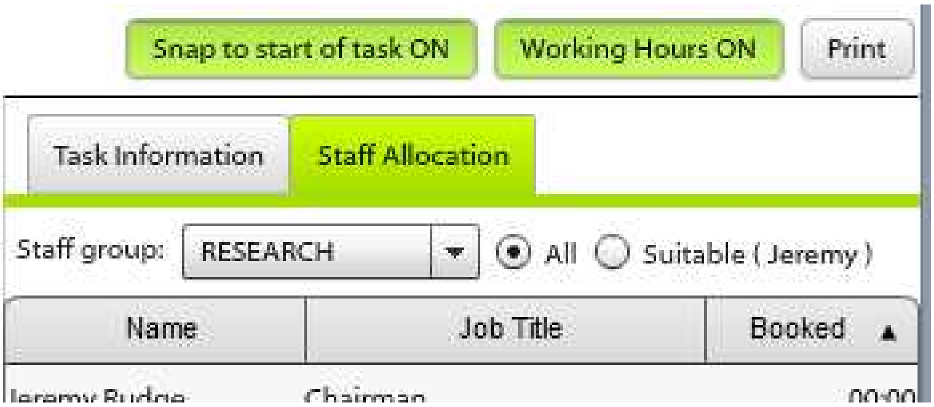
Staff Group

The header bar allows you to select a staff group from the dropdown.

Select a group and the view will show only those staff members in that grouping – in availability order.

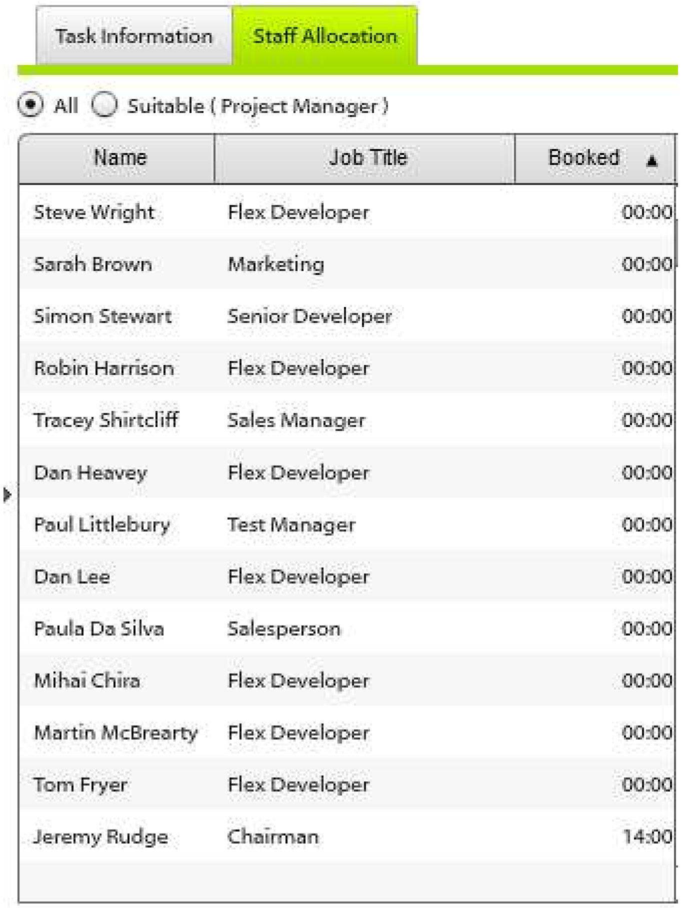
The staff group names and the members of that group are set by your system administrator in Admin.

This feature allows you to have team of people that pitch for work, teams that work on various clients and so on.



Staff Availability / Bookings

For each member of staff the system shows the extent to which they are booked for the dates spanned by the task.



If you move the task the bookings figure will change to show staff bookings for the new dates.

In the absence of a desire to allocate a particular person to a task the person at the top of the list will always be able to do the work and be the most available. Clever? We think so.

The bookings figure is calculated as follows :-

- All bookings are taken into account, scheduled work and time bookings, including tentative work bookings
- The bookings relate to booking by day covered by the task.
    - Example If a task starts at 4pm Monday and finishes 10 am Wednesday the bookings total is that for all of Monday, Tuesday and Wednesday

Traffic gives you tools to manage schedule clashes in Manage Studio.

Tip : If all staff are booked, simply move the task until you find a time where staff are more available.

Tip : Don't be too concerned about over booking staff. Agency workflow is fluid and the Manage Studio section gives you several ways of dealing with scheduling conflicts.

Applying People to Tasks (2)

Once you have chosen the person you wish to allocate to the selected task click on them.

At the bottom of the staff list you will see

Allocation Length

This is the amount of that persons time that will be scheduled to this task.

The default is the remaining task hours left to be scheduled with a minimum of 30 minutes. You may wish to change this manually if you want several people working on the task, each to do a few hours for example.

Snap to Start of Task

To allocate a member of staff to the task you click and drag them onto the task.

If “Snap to start of task” is checked then the start time for that person will automatically align to the start of the task.

If “Snap to start of task” is NOT checked then the piece of work will start at the time you release the mouse. To help you the start date / time is shown over the mouse as you move over the task.

Tip : This mode allows you to allocate say 10 hours to one person form the start of the task and then 10 hours to someone else starting at another time.

Recurring Scheduling

Recurring scheduling allows you to scheduled staff members to jobs using rules that determine how the schedule is allocated.

For example you could ask that 100 hours be allocated to a person for two hours every Tuesday and Wednesday from 11am for the next 25 weeks.

This function is similar to some project management programs - Microsoft Project for example – that lets you allocate 20% of a persons time to a project over the next 6 weeks, but Traffic LIVE thinks in terms of hours not %.

Setting a Recurring Schedule

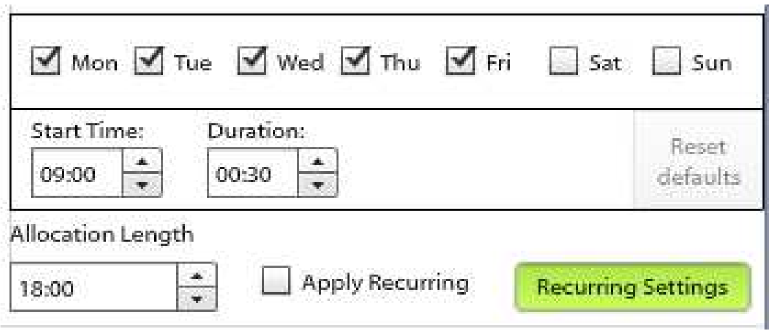
Recurring Scheduling is only available in Job Schedule.

Enter the job schedule, select a task on the left, and then select Staff Allocation.


Task Information
Staff Allocation
Staff group:
Show All
All
Suitable (Designer)
Name
Job Title
Booked
Tracey Shirtcliff Sales Manager 00:00
Marcus Wilkinson Flex Developer 00:00
Kevin Culligan Customer Relations 00:00
Mihai Chira Flex Developer 00:00
Ales Havlik Flex Developer 00:00
Lion Meng 00:00
Tom Fryer Flex Developer 00:00
Martin McBrearty Flex Developer 00:00
Chris Cropley Test Manager 00:00
Robin Harrison Flex Developer 00:00
Simon Stewart Senior Developer 00:00
Kyle Ward Flex Developer 00:00
Louis Almeida Trainer 00:00
Lucy Thomas Marketing 00:00
Dan Heavey Flex Developer 00:00
user Permission Test 01:00
2 Chao Meng 01:00
Allocation Length
18:00
Apply Recurring
Recurring Settings
Cancel Changes
Save

To edit the recurring setting, click the “Recurring Settings” button.

The Recurring Settings view will slide up



You can then select

- the days of the week you wish the work to be scheduled to
- the start time of the work
- the duration

In the example above 18 hours will be scheduled to the selected employee on Monday, Tuesday, Wednesday, Thursday and Friday starting at 9:00am for half and hour, hence finishing @ 9:30am.

If your booking spans the working time rules – lunch for example – then these will be observed when scheduling. If for example you set lunch time as 12:30 – 1:30 and set a recurring appointment to run from 12:00 for 2 hours, it would schedule 30 minutes before lunch and 90 minutes after.

Once the variables are set, click “Recurring Settings” once again to close the dialogue.

When you are ready to use the function, simply check the “Apply Recurring” check box before you click / drag a staff member and the recurring rules will be applied.

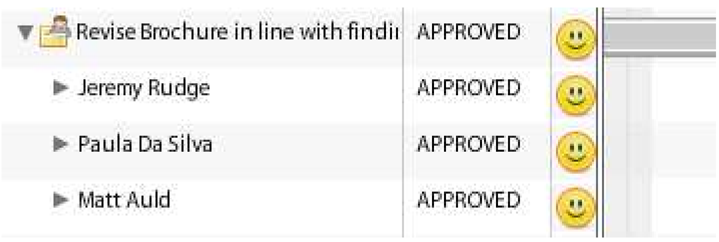
Important Note : Recurring Scheduling puts recurring items into the Schedule. Traffic LIVE has two methods of moving work. Grouping On / Grouping OFF. Grouping On moves a whole block of work and then flows the work around working time. Grouping OFF allows individual chunks (intervals) of work to be moved.

If you move work that has been put in as Recurring with Grouping ON then the entire set of intervals will be moved and normal working time rules applied – which will in effect collapse the work into a continual time block. If you use this function please make users authorised to move work aware of this.

Seeing who is allocated to a task, and when they are working

If you would like to see who is working on a task this is displayed at the end of the task bar.

If you click on the task to open it you will see a list of people working on the item together with a bar showing when their piece of work starts , ends and the number of hours they have logged against it depicted as a progress bar.



If you click on the person the tree will expand again and will show the actual working times allocated to the person.

Moving a persons allocation

Having opened the task you will see the hours progress bar for each person.

If you click on this progress bar you can move it left and right. You will also see all of the allocation times move at the same time. The bar will auto size to working times if Working Hours is enabled.

Tip: If you move an allocation beyond the task deadline date then the task bar will be outlined in red to highlight this to the user. You are free to ignore this warning.

Moving Individual time intervals

By clicking on individual time intervals you can move shrink and stretch them as you choose.

Deleting allocations

To delete a person from a task, or simply to remove one or more time entries

- Open the tree and select the person
- Ensure that the right hand pane is selected to show "Task Information"

- The bottom of this panel shows the employee and all allocations
- Select what you wish to delete (either the Person or one or more time entries)
- Click delete
- Remember to SAVE your changes

Pending / Approved Status

Each time interval in the system can carry a status of either Approved or Pending.

The default setting will depend upon choices made by your System Administrator when your system was set up.

Time intervals set to PENDING will NOT show in users My Traffic workflow calendars. Only entries with a status of APPROVED will show in workflow.

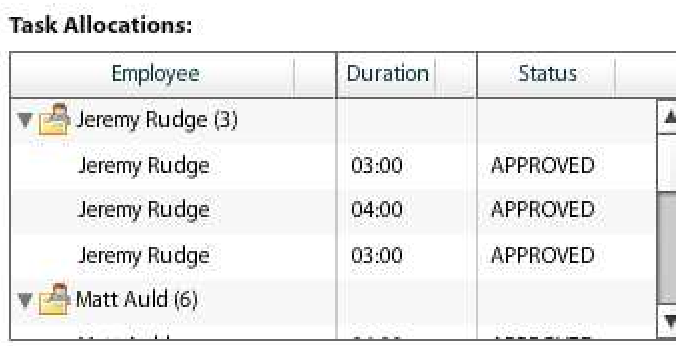
Depending on the permissions allocated to you by your System Administrator you may or may not have permission to change task statuses.

If you do not have permission to change status the approval buttons mentioned below will be greyed out. If you feel you should have approval rights please contact your System Administrator.

The status of each entry is shown in two places

1. The left hand tree when opened to the level of person or below will show the status of each entry

in the right hand “Task Information” pane details of all allocations and their status can be seen.



To change the status of an allocation

- select either a person or one or more allocation
- click Approve
- remember to save your work.

If you select an approved item the button will show “un-approve” and by clicking this you can change work back to a pending state.

Tip : Each time you change or move work in this view the amended item will change back to Pending (if this is the default state set by your System Administrator in admin).

Tip : The main purpose of this function is to allow project managers to request work allocations that are subsequently approved by someone else.

Tip : Manage Studio has other tools available to manage the approval of work

Setting Dependencies

Dependencies can be set by

- selecting the task in the left hand tree
- opening the right hand view in Task Information view
- Selecting from the Dependency drop down the task that you wish the selected task to be dependant upon

The dependency will then be shown on the screen. You are free to breach dependencies by dragging items, but this will be visually obvious.

End users who are authorised to move their work will not be able to move work such that it breaches a dependency.

Dependencies and automatically moving dependant items

We have been asked if Traffic LIVE can automatically move dependant items within the schedule in a similar manner to MS Project.

This feature is relatively simple to achieve technically, however we have chosen not implement a solution for the reasons below.

MS Project exists in its own world. It is simply a plan. It does not have real people with real diaries attached to it. Neither typically will it have a view of anything other than the project you are looking at.

Traffic LIVE is different. It holds all your projects and they link to real people doing real jobs.

If dependant item automatically moved then your carefully planned schedule would be thrown out and suddenly dozens of double bookings would appear in your schedule.

To some extent this is going to happen anyway, however we believe that this action needs to be something conscious that you ask the system to do as opposed to it simply happening.

The Shift Schedule function allows you to block move work once you have decided this is indeed your only option.

Shifting the Schedule

If you have scheduled a job, and the time line changes you can use the "Shift Schedule" feature to move the schedule, and if required the associated Allocation and Intervals.

Please experiment with this feature before using it. Once you have moved the schedule and the resources and clicked SAVE you will be unable to cancel the changes. Changes applied to a large job without due consideration to the resulting changes to the schedule may prove time consuming to fix.

If you have not done to much work on the schedule, and have NOT allocated any / many staff to the job you should consider changing the end date and Auto Scheduling the job once again.

To Shift the Schedule you need to undertake the following steps.

1. Select the point in the schedule you wish to move from. The function will move the selected task and **all tasks below** it in the list. **Tasks preceding the task selected will not be moved**

2. Click "Shift Schedule". The "Shift Schedule" dialogue will show.

3. Select the date to which you wish the first entry to be moved to. This can be either forwards or backwards in time

4. If you wish to move "Groups and Allocations" check the box (more below)

5. Click Apply and the changes will be made.

The changes will only apply to the server once the SAVE button is clicked.

Shift Schedule simply applies an offset to your job and moves the schedule forward or backwards by a given number of whole days. The start and end times of the tasks remain the same. **Critically the schedule is NOT put through working time rules.**

Somewhat by definition jobs that you are seeking to shift are more likely than not to be quite complex. If Working time rules were applied all stages would assume system defined lengths rather than retain any changes that you have made. This is not desirable.

For this reason **we strongly suggest that you only move schedules forward or backward in multiples of 7 days** – ie if the task you commencing your move point on starts on a Tuesday, select the target date to be on a Tuesday as well. This will ensure that weekends etc. are still treated correctly in the schedule.

Moving Groups and Allocations

You will recall that Traffic treats the start and end of a task independently from the people allocated to do the work.

If you do not check the box the function will **ONLY CHANGE THE SCHEDULE – IT WILL NOT MOVE THE TIME SCHEDULED TO YOUR PEOPLE.**

The system does this to ensure that you as user are always in control of Traffic, not the other way round!

Any allocations moved by Shift Schedule will be set to the default system state set in Administration – ie Approved or Pending.

Some thoughts on Shift Schedule

This section started with a "health warning". The Shift Schedule function can save you hours, or cause hours of work if you get it wrong.

This is the most invasive function across the system, hence our expressions of caution. No other function is capable of making so many changes so quickly. As you will have gathered by now this has pro's and con's.

To help you we would recommend you consider the following :-

- When setting up your projects and jobs keep jobs to a sensible size. Maybe 100 / 200 lines. The bigger the job the greater the impact if you have to reschedule. Remember you can have a many jobs in a project as you require so there is only an upside to following this suggestion.

- By splitting up jobs into smaller sizes you can schedule as you go, rather then trying to schedule many months in advance which will give you greater issues if you need to move the schedule

- If you have not done much to the Schedule we would recommend you consider simply changing the end date and using the Auto Schedule function.

- If you Shift the schedule try to move it in even increments of 7 days. This will hence ensure weekends are correctly handled. Working Time rules are not applied on purpose as to do so would change any manual adjustments you have made to the tasks

- If possible (what follows is idealistic we appreciate) try and move the job forwards by a good margin. Say 4 weeks. In this way you will have less in the way of clashes to deal with than if you move if forward only a week

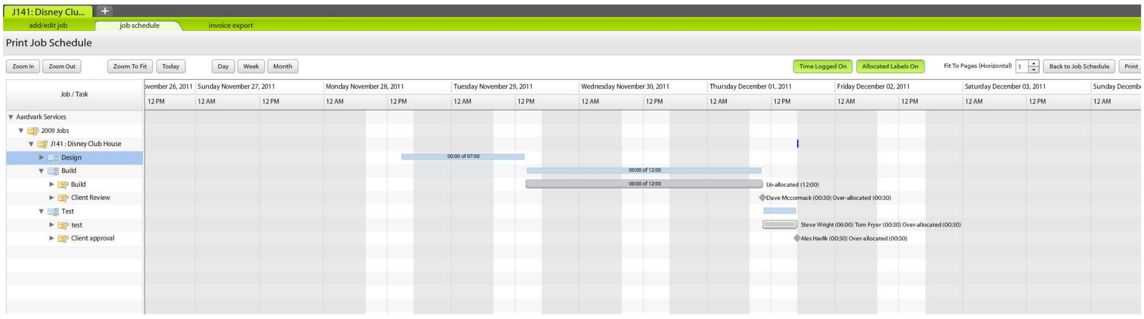
Finally, please do play with this on some small jobs before unleashing mass changes on your masterpiece!

Do Now

The Do Now button escalates the chosen task to be done immediately.

Client Facing Gantt Chart / Schedule

To product a client facing Gantt chart click “Print Current Job” in the top right of the Job Schedule View



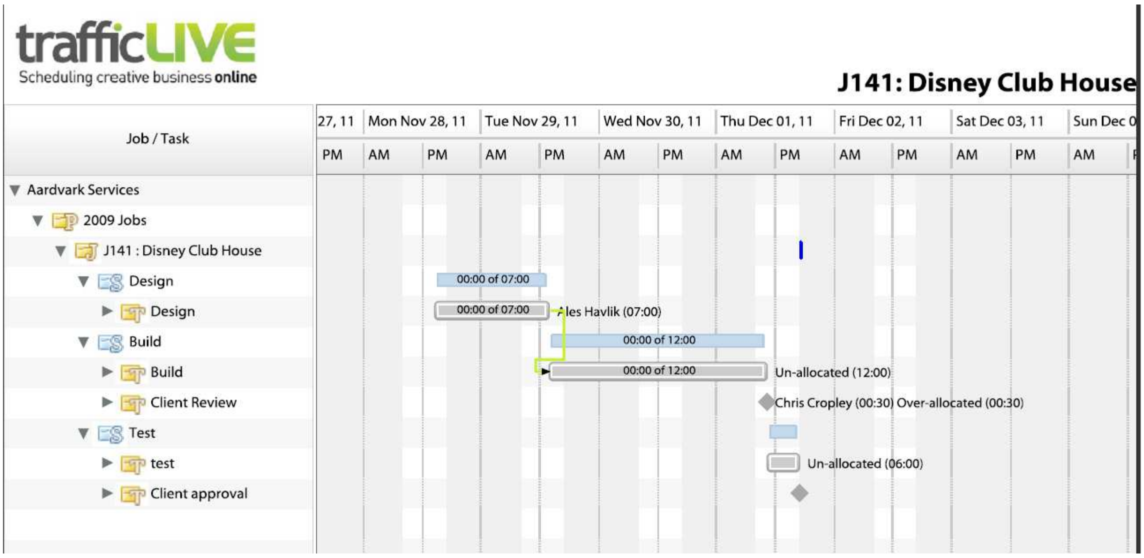
In this view you can choose how much or little you choose to output.
You can expand the left hand tree to the extent you feel is appropriate and also control the type of information you wish to display.

Toggling the Time Logged On and Allocated Labels On buttons will add and remove information from the Gantt.

All coloured rings (indicating that the job is breaching deadlines / dependencies) are suppressed in this view.

You can zoom out / in to show appropriate time lines, and select how many pages you wish to print out over horizontally. The number of pages vertically is determined by the number of lines you are printing.

Sample Output



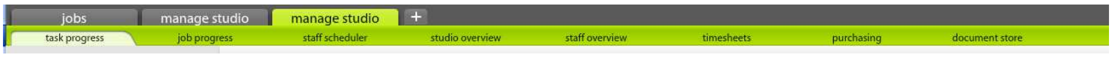
A sample output is above. The logo displayed is your logo.

Tip: You will probably need to select Landscape when printing this view

Tip: This views is pretty much “what you see is what you get” BUT if you have a widescreen monitor it is quite possible that the width of your monitor in scale terms is wider than a piece of paper, so the view may show as more compressed than you would imagine. You can either change the zoom or print over more pages.

Manage Studio

Manage Studio contains a range of view to help you …. Manage the Studio



You will find everything you need to manage task delivery, job progress, see studio utilisation, manage purchasing and move schedules around as you wish.

Task Progress

- Shows all due and over due tasks and allows analysis by person, project etc.

Job Progress

- Shows all live jobs and their progress

Staff Scheduler

- Allows the scheduler to see everyone’s workload, move work, schedule, de-schedule, split work up and more

Studio Overview

- Shows visually all work in the studio, when it starts, stops, is due and progress to date

Staff Overview

- Shows visually the bookings of your people allowing you to understand capacity and answer questions like “when do you next have a designer available"

Timesheets

- Shows visually time logged for everyone in the business

Purchasing

- Shows all current purchases and their status

Document Store

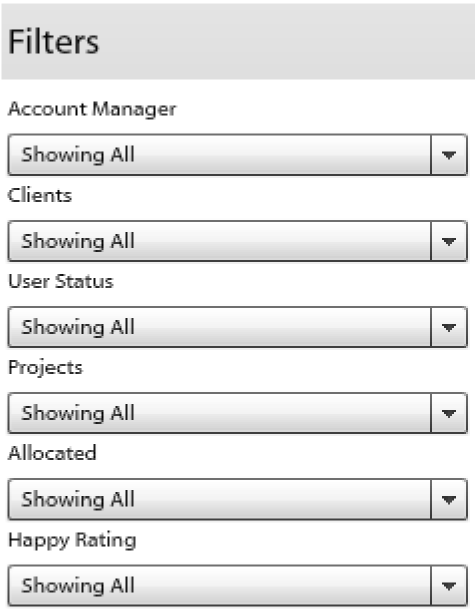
- Allows you to review and manage all documents (files) stored in your Traffic LIVE system

Task Progress

Task progress shows all tasks in the system that are due or overdue within the date range specified

The fields are self explanatory as they have been covered in other areas of this guide, however please note that if multiple people have been allocated to a task then they will all show in the Allocated column.

The grid maybe filtered using the filters to the left of the grid.

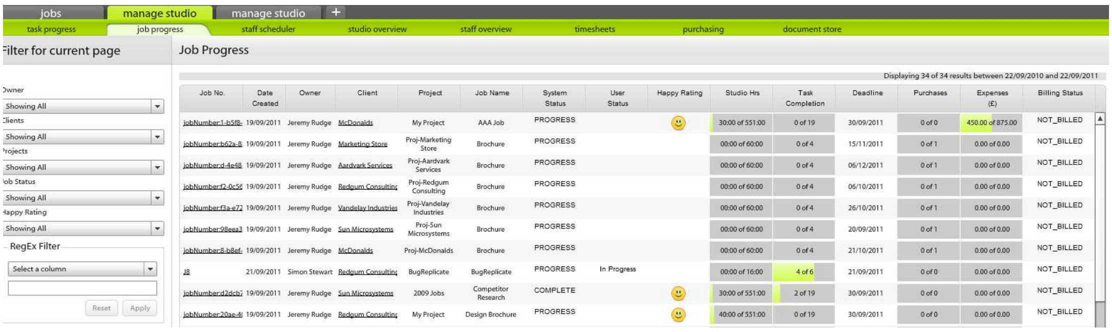


Tip : Filtering by “Allocated” will allow you to see the status of all work assigned to an individual. This maybe useful for a current work review.

You could also change the date range to look at someone's historic performance.

Job progress

Job progress shows all jobs in the system meeting the date and status ranges at the bottom of the screen.



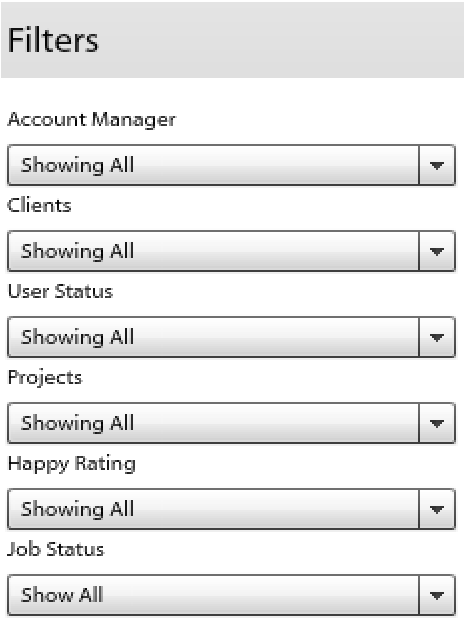
The fields are self explanatory as they have been covered in other areas of this guide.

Please remember that the happy rating of the job is set by the individual tasks.

The rules on Job Happy Rating are as follows

All tasks happy – Job Happy
All tasks complete – Job Complete
Any on task unhappy – Job Unhappy

The grid maybe filtered using the filters to the left of the grid.


Filters
Account Manager
Showing All
Clients
Showing All
User Status
Showing All
Projects
Showing All
Happy Rating
Showing All
Job Status
Show All

In addition to the drop down filters you can also apply a “Regular Expression” to the filtered list.

Regular Expressions allow you to choose any field and then filter the results using that expression.

For example you might want to find every job that contained the word BRAND, or started with the word BROCHURE.

This guide does not seek to teach the use of regular expressions. This web site does a far better job.

http://www.regular-expressions.info/

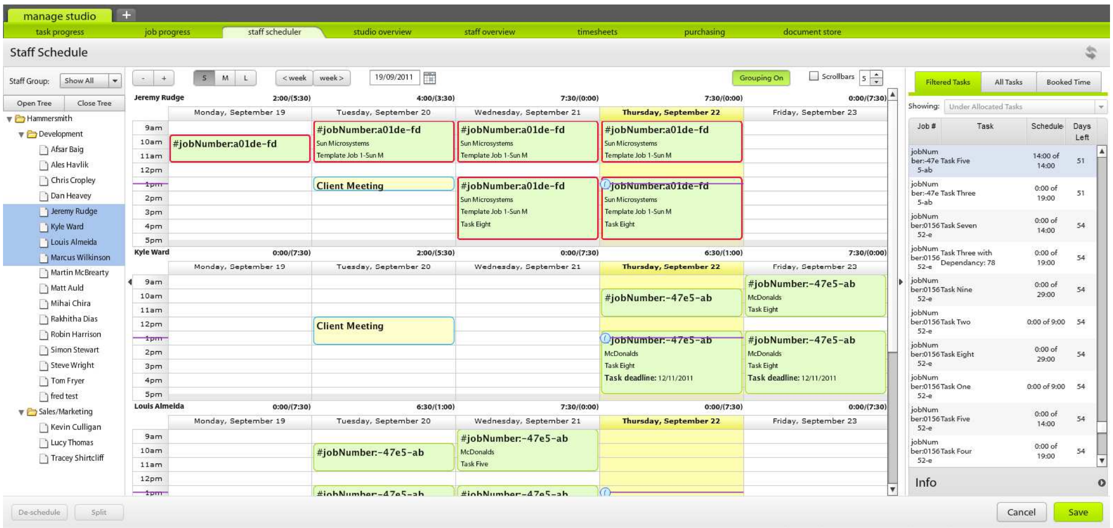
A few things to get you started

Hello	This will return all matching records that contain the word Hello
^12	This will return all records that start with 12
gr.y	Will return things that have gr<any character> y eg grey, gray

trafficLIVE
Scheduling creative business **online**

Staff Scheduler

Staff Scheduler is at the heart of Staff Scheduling,



Schedulers can view the workflow of all staff members and move work between people – in whole or part – as required.

Tasks can be removed form the schedule, and unscheduled tasks can be scheduled.

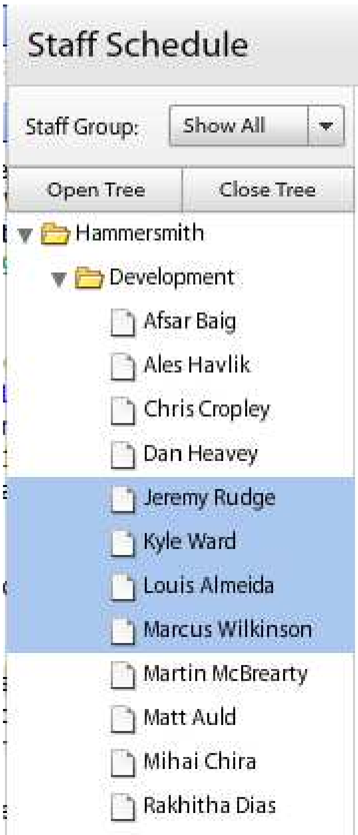
Finally tentative bookings can be made to book staff in advance of formal jobs being in the system.

Screen Layout

The Staff Scheduler is made up of three main areas

Left hand Panel

The left hand bar allows you to select who's schedule you wish to view.



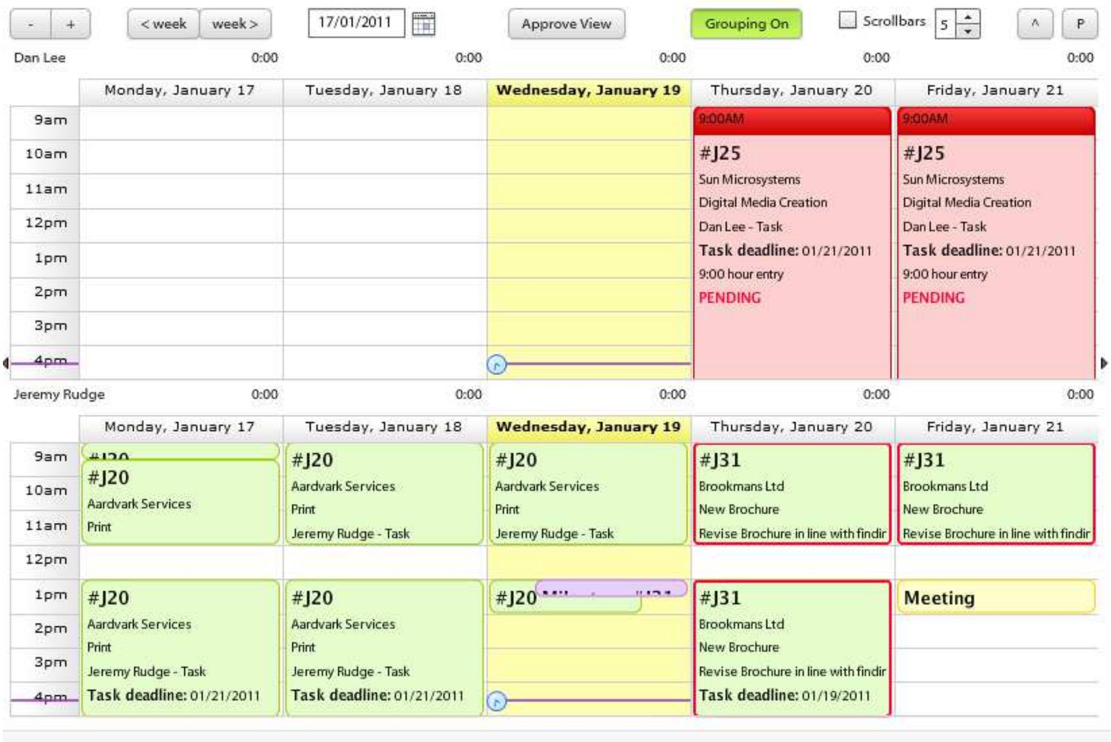
People are grouped by Location, then department and finally their name.

If you wish to see a pre set group of staff you can select them from the dropdown. Staff groups are set up in admin by your system administrator.

You can select a single schedule by clicking on an individual. Multiple schedules can be selected by either Shift Click to select staff in a range, or Control Click on a PC or CMD Click on a Mac to select staff members individually on a PC or CMD Click on a Mac.

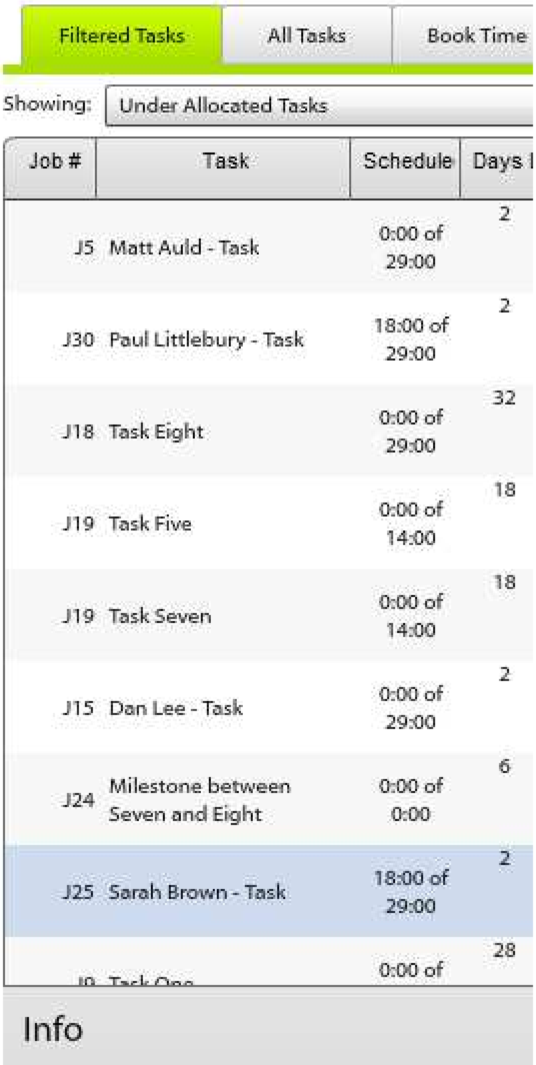
Middle Panel

Displays one or more schedules



Right Panel

Contains elements that can be dragged onto the schedule such as tasks and bookings. Also shows task information that shows where the various components of a task are and their status.



Getting Started

Selecting a member of staff from the left hand panel will display that staff members schedule in the middle panel.

The schedule will display

- All scheduled items in an Accepted State (Green)
- All scheduled items in a Pending State (Red)
- Booked time – editable magnolia (for all those who have decorated properties with a view to selling them. For everyone else it is beige!)

- Booked time – non editable orange
    - Booked time can be locked by its creator, hence you cannot edit it
- Milestones (Purple)

Items can have coloured boarders. These relay the following information

Red Ring

- If any part of the allocation has been moved beyond the deadline date of the task

Purple Ring

- If any part of the allocation had been moved to start before the end of a dependant task

The default time line is to show your agency working times – as set by your system administrator – as the start and end time of the calendars for a 5 day working week.

Changing the number of days displayed

At the top of the screen is a number scroller that controls how many days the schedule displays. The default is 5 days, and you can set this at any number between 1 and 7.

Expanding to 7 days will allow you to schedule staff at weekends.

Changing the times displayed

Click “Scrollbars” checkbox at the top of the screen and the scroll bars will appear on the schedules and allow scrolling. Scroll bars are off by default for clarity.

Alternatively you can zoom in / out using +/- at the top of the screen.

Changing the week displayed

Click the left or right Week buttons to move weeks.

You can also select a date you wish to view using the date picker next to the week buttons.

Expanding the Calendar Size

If you schedule large volumes of small – say one hour tasks –to your people this view will become crowded.

You can expand the calendar size from small to medium or large using the buttons above.

Moving Work

Work is moved by clicking on it, holding your mouse key down and dragging the work to its new location.

When you click on a piece of work to move it you must wait for a moment for the system to load information that enables the object to move. In most cases this will be a fraction of a second, but if you click and move in one single motion you will "beat" it.

There are a number of rules and modes that this can work in, ensuring that the system is doing the work and not you!

At the top of the screen there is a mode button which can be toggled between "Grouping On" and "Grouping Off".

Some Theory

Before continuing a little bit of theory. Please bear with us for a moment and read on. If you understand this concept detailed below you will get so much more from the system!

Work Allocated to you in Traffic is constructed of a number of Intervals. When the system schedules by default it allows for the start of day, the end of day, lunch time and weekends.

As such a piece of work allocated to you for say a 10 hour piece of work starting at 11am on a Monday – and assuming a 9 – 5 working day with an hour for lunch at noon would be allocated to you as follows :-

Monday 11am - 12 noon 1 Hour

Monday	1pm – 5pm	4 hours
Tuesday	9am – 12 noon	3 hours
Tuesday	1pm – 3pm	2 hours
		10 Hours

We call each of these time chunks an interval. Intervals need not be sequential, so you can have people working a few hours here and a few hours there.

A set of intervals allocated to a person for a specific task is called an Allocation.

Each task may have several people assigned to it, in which case it will comprise multiple allocations.

The structure is hence as follows

Project

Job

Task

Allocation (a collection of intervals assigned to someone)

Interval (a unit of time)

Grouping On

If you move a piece of work in "Grouping On" mode you can only grab and move the First or Last Interval. Dropping the piece of work in a new location will then apply the same working hours rules as above and the whole piece of work will be kept together as one continuous piece automatically.

Tip : In Grouping on mode the whole task is moved and the rules on working time are observed. You cannot move work outside of the system defined working times.

Grouping Off

Turning Grouping Off allows you more direct control. In essence the learner wheels are removed and you are in control!

With Grouping Off you can

- Move Intervals independently of each other
- Move intervals into non-working time – lunch times and evenings for example
- Split Intervals into small components

Moving Intervals

Select any item scheduled item and you can drag it anywhere you choose. The other intervals will not move.

For example you could scheduling someone to work late and hence move some scheduled work from the following day into this evening.

You can also move work using the date picker at the bottom of the grid.

Select an interval. The lower panel will display details about the client and job. You can then select your preferred start date and click apply.

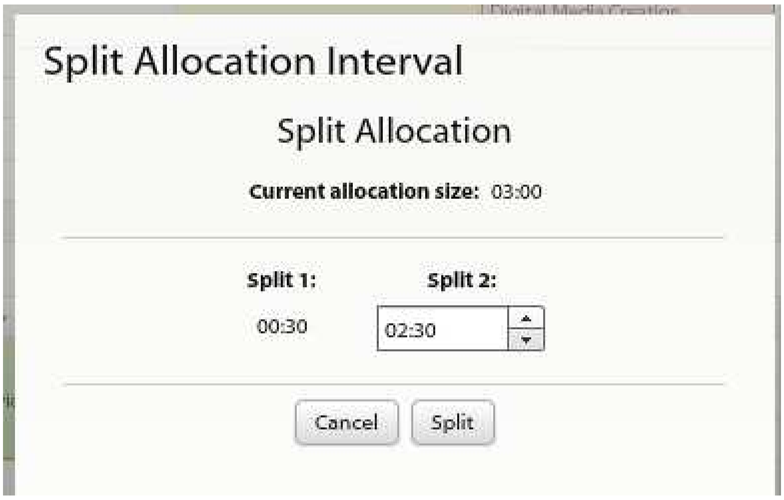
This function is useful if you are trying to move work several weeks into the future, which would otherwise involve several drag operations.

Splitting Intervals

Lets say you wanted to schedule someone to work their lunch hour. Locate an Interval. Click on It.

At the bottom of the screen the "Split" button will be visible. Click it.

The split pane will appear. You can then split the Interval into two parts. Select the size of the interval and click Split.



The Interval will split in two and you can then drag either part wherever you choose.

Putting it all back together again!

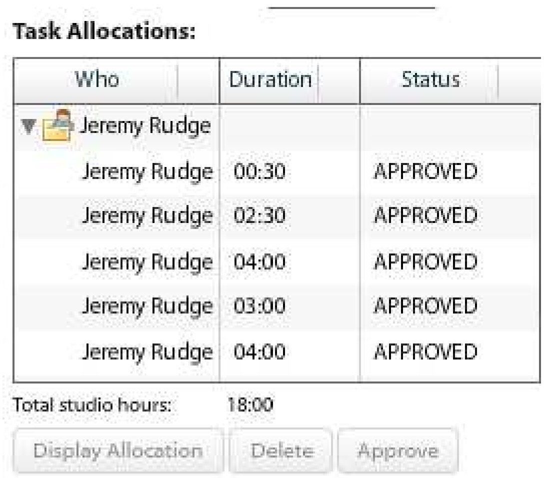
By splitting and moving work you can create your own masterpiece of scheduling. If your masterpiece turns out to be a little wide of the mark simply select “Grouping On”, drag the first Interval and the whole job will be rebuilt in sequential order.

What have I done?

The ability to split and move is clever, however there is a risk particularly if you make active use of this facility that you may loose track of what is going on.

Help is at hand.

Select an Interval. Make sure the pane is selected to Show Tasks. The bottom of this screen will show where all of the intervals for the task are located and their status.



By selecting and item and clicking “Display Allocation” Traffic will take you to the appropriate schedule entry.

Tip :If you get lost, either put Traffic into Grouping On Mode and regroup, or click Display Details and see where each item is allocated.

Tip : You can set your preferred mode – Grouping on / off in My Settings.

Moving work between schedules

Moving work between schedules is similar to moving working within a persons schedule.

Simply click “Control” on a PC or CMD on a Mac on your keyboard before you click the mouse to move an item. As above, wait for a second whilst data loads, then simply drag the item to the required schedule.

Removing work from the Schedule

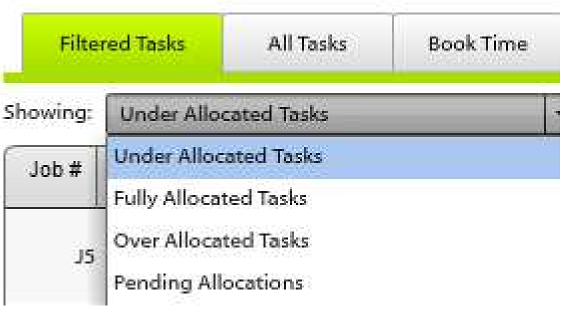
To remove an interval from the schedule, select it and either press delete on the keyboard or click the de-schedule button at the bottom of the screen.

Work will then appear on the right pane as unscheduled.

Scheduling Unscheduled Work

The right pane contains tasks that can be dragged into the schedule.

Selecting the Filtered Tasks tab will allow you to see



Under allocated tasks

- tasks that have less hours allocated to them than the length of the task (includes those with nil hours scheduled)

over allocated tasks

- tasks that have more time allocated to them than sold

Fully allocated tasks

- tasks where the hours scheduled and allocated are the same

Pending Allocations

- All tasks that have a status of Pending. Pending tasks will not show in individual schedules until approved

Selecting All Tasks allows you to find any task in the system and schedule it.

Once you have selected the list you wish to work with select the item by clicking on it,

Clicking on the task will recall additional information about that task from the server which may lead to a short delay.

At the bottom of the list is a “Next Allocation Length” time. By default this is set to schedule to remaining time on the task , subject to a minimum of 30 minutes. If you wish to schedule less time then edit the time BEFORE you drag the interval onto the calendar.

Once you are ready, click and hold the task you want to schedule, and drag it onto the required schedule.

Pending / Approved Status

Each time interval in the system can carry a status of either Approved or Pending.

The default setting will depend upon choices made by your System Administrator when your system was set up.

Time intervals set to PENDING will NOT show in users My Traffic workflow calendars. Only entries with a status of APPROVED will show in workflow.

Depending on the permissions allocated to you by your System Administrator you may or may not have permission to change task statuses.

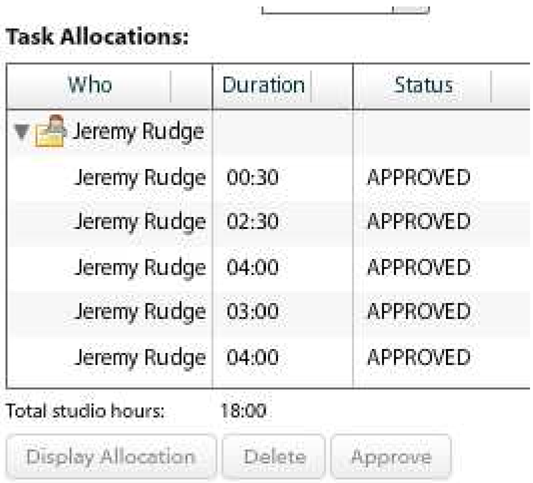
If you do not have permission to change status the approval buttons mentioned below will be greyed out. If you feel you should have approval rights please contact you system administrator.

The status of each entry is shown in three places

- The entry on the calendar shows "PENDING" (Red entries) or "APPROVED" (Green Entries)
- The Information bar at the bottom of the Filtered Tasks tab
- by selecting "Pending approval" from the drop down in the Filtered Tasks tab

To change the status of an allocation

- select the allocation in the info Bar. You can select intervals individually, or by clicking on the persons name you can approve a personal allocation as a block
- click Approve
- remember to save your work.



Approve View

An alternative is to click the “Approve View” button at the top of the screen. This will approve ALL intervals across all selected schedules within the date range displayed.

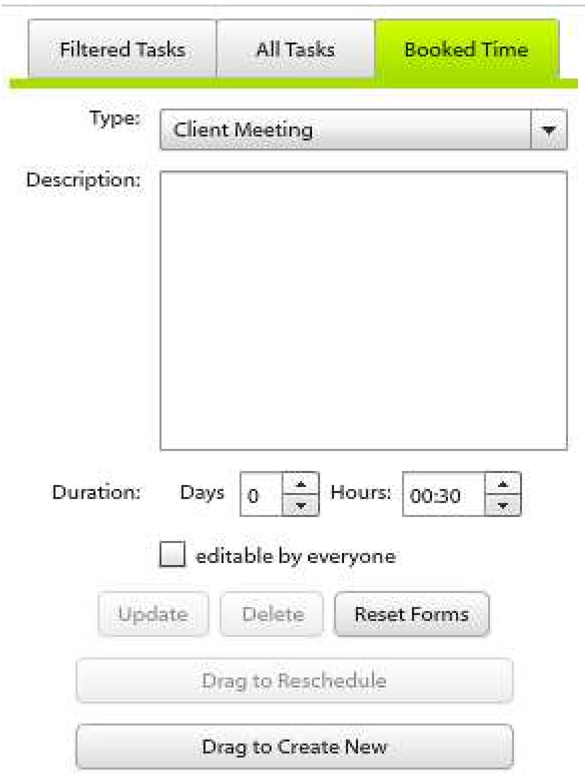
For example if you had 10 schedules open showing Monday to Friday all intervals for those to schedules appearing between Monday and Friday would be approved.

If you select an approved item the button will show “un-approve” and by clicking this you can change work back to a pending state.

Work added to the schedule will have a default status of Pending. Any work already Approved will retain this state when moved by the scheduler.

Making Tentative Bookings / Holidays and similar

Click on the Book Time tab on the right pane.



Select the reason for booking time. The list of available time booking options is set by your System Administrator in Admin. Typical reasons to book people out of the schedule would be Holidays, Meeting and Tentative work bookings.

Enter a description of the booking. This will be seen by the person whose schedule you are booking.

Select the time in hours or days.

If you wish this booking to be editable by others, check the box. If left unchecked the booking is locked and can only be moved by the person who created it.

Finally click on the “Drag to Create New” button and drop it onto the schedule you wish to book.

Tip: If you wish to make the same meeting in several peoples calendar you can drag and drop the “Drag to Create New” lozenge repeatedly without needing to change its settings.

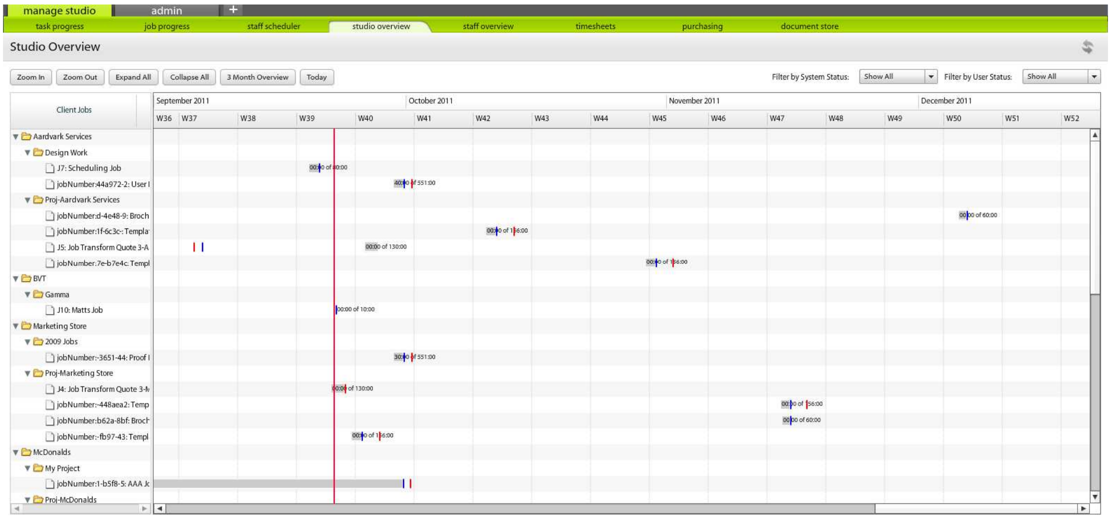
Editing Bookings

You can edit a booking in a number of ways.

- Moving the booking – just drag and drop. You cannot move appointments between calendars.
- Deleting the booking
    - Click on it and either press delete on the keyboard or click the delete button
- Changing the duration
    - Click the end or start of the booking and stretch or shirk the booking

Studio Overview

Studio Overview gives a graphical representation of all jobs in the studio.



The default time line will show information for the past week and the following 3 months.

The Gantt will display

- a bar showing you the timeline of the job. The bar will start at the scheduled date of the first task, and end at the scheduled date of the last task.

- The bar will contain a progress bar showing how many hours have been logged compared to the Studio Hours of the job.

- A blue vertical bar to depict the internal deadline of the job

- A red vertical line to depict the external deadline of the job (if set)

- A solid red vertical line indicating today

- Hovering your mouse over the bar will show you additional information

To view the job, click on the job in the left menu and the job will open in a new tab.

Tip : All things being approximately equally you would expect the progress bar for hours done to be approximately in line with the "Todays Date" vertical red bar.

This makes the assumption that the job is expected to burn hours in a reasonably even manner over its duration. There are of course exceptions with some jobs having a significant front or end loading of hours, but in general this holds true. If hours burnt is significantly out of line and the job has no front / end loading that you know of then it merits investigation.

Filtering the view

The view can be filtered by system and task status using the drop downs at the tope of the chart.

Changing the view

You can change the view in a number of ways

Zoom In

Zooms the view in

Zoom Out

Zooms the view out

3 month view

Restores the display to the default view

Today

Zooms to today's date

Clicking the Header of the Gantt (the month the week number etc)

This will zoom the view to the month, the week, the day etc.

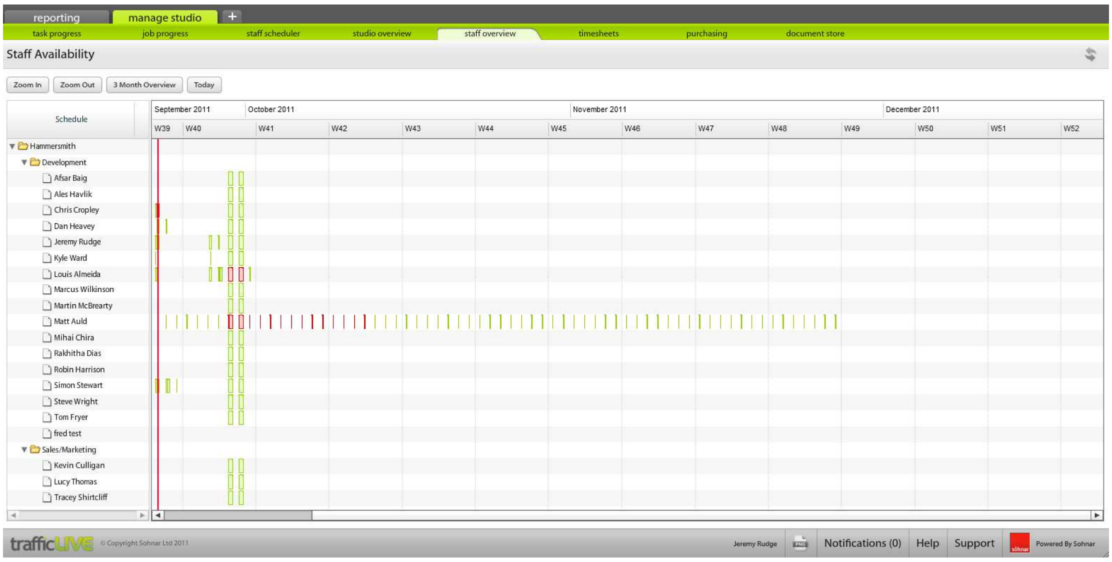
Position your mouse on the Gantt, click and hold, move your mouse left and right

This will move the date of the view forward and backward. As you move you will see the list on the left change to correspond to jobs fitting the new date range.

There maybe a slight delay as you move whilst information is requested from the server.

Staff Overview

Staff Overview gives a graphical representation of staff workload.



Its principal aim is to help you understand how busy the studio is both now and in the future, to highlight double bookings and also to help answer question like “I need a designer for 3 weeks, when do you next have a block of time that long available?”

The default time line will show information for the past week and the following 3 months.

The left hand tree breaks down staff by location, department and then staff member.

When opened the workload of all staff members will be displayed on the Gantt, and the red vertical bar depicts today’s date.

The Gantt will display three types of data

- Green bars will show scheduled work
- Brown bars will show booked time.
- Red bars show that there is a work clash

Booked time is classified at system setup by your system administrator but will most probably include things like meetings, holidays, sickness and most importantly for this view tentative work bookings.

Hovering your mouse over the work item will display details about the booking.

Tip : This view was designed to show high level information for capacity planning. If you want to look at a persons workflow in detail Staff Scheduler will give you a better view

Changing the view

You can change the view in a number of ways

Zoom In

Zooms the view in

Zoom Out

Zooms the view out

3 month view

Restores the display to the default view

Today

Zooms to today's date

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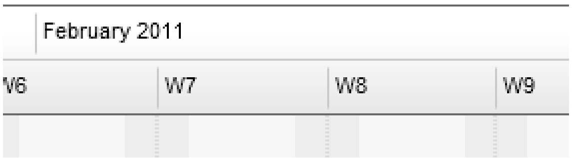
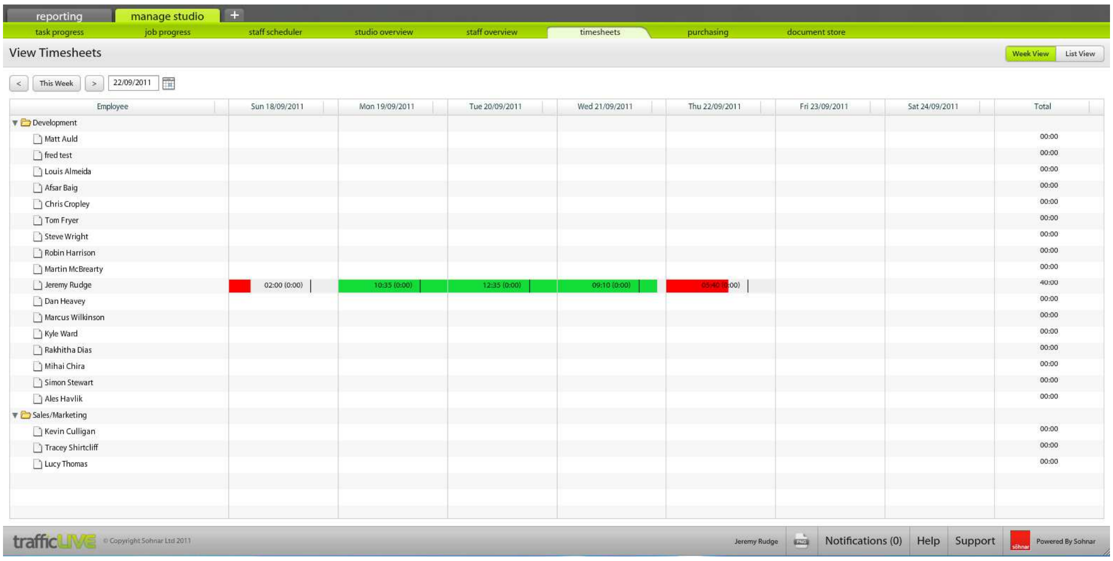


Timesheets

Timesheets shows details of the time logged by all staff in the business.



Viewing Timesheets

Timesheets shows details of all time logged as a graphical progress bar.

Each user has a number of hours they are expected to log each day. This will have been set by your System Administrator in Admin.

The progress bar displays the hours recorded relative to the hours individuals are expected to record.

If they have recorded less than the required number of the bar will be red, the correct number or more will display in Green.

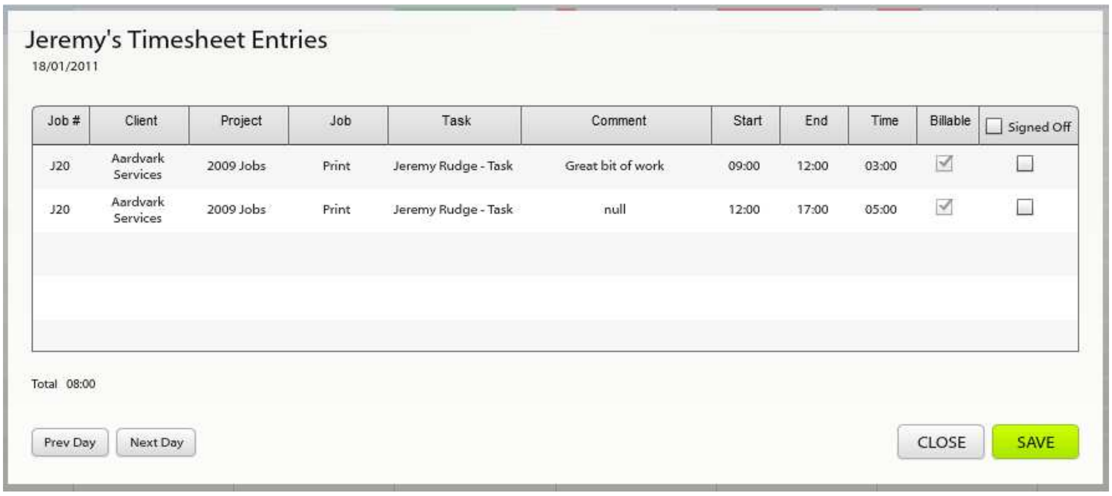
There is a Vertical Bar within the progress bar. This is the 100% bar (ie they have logged the amount of time anticipated). The full deflection of the progress bar indicates upto 120% of the anticipate hours have been logged.

If non billable hours have been logged then these are shown in brackets and the bar will have a “sub bar” displayed showing non billable time in red.

To view details of the timesheets making up the hours double click on the progress bar.

Signing off Time

Double clicking on a progress bar will show the time sheets.



Using the check boxes to the right of the time entry you can sign off individual time entries.

There is a check box in the header which will sign off all time entries for that person.

Click SAVE and the pop up box will close.

If ALL of the time entries have been signed off then the progress bar will turn grey.

Once time has been signed off your team will not be able to move or modify time in any way. Time entries in their calendar will turn from Blue to Grey.

Tip : If you need time edited once it has been signed off, enter this view, uncheck the signed off box, click save and the entry will be available for editing.

Tip : Signing off time is optional. The only impact is to stop time being edited by others once agreed.

Tip : If you are compliant to British Standards, Sarbanes Oxley or any other certification requiring an audit trail we would recommend you consider signing off time.

Export of Time

Traffic LIVE lets you export time entries, either to allow analysis, or to be processed by another program / system.

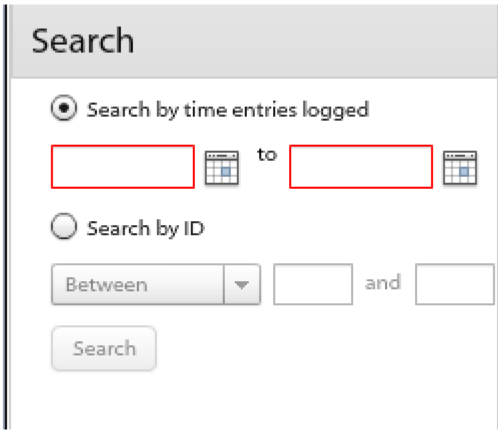
To export time navigate to Manage Studio / Timesheets.

At the top of the screen you can change the view from week view to list view.

Select list view.

The Screen will contain no data until loaded.

Use the search function – below and click "Search". Data will load.



You can search by the date the time entry was logged or a Unique ID.

You can filter by the filters provided, and also by Regular Expression. Regular expressions are briefly covered elsewhere in this guide, and explained in some detail here

http://www.regular-expressions.info/

Why have Search by Unique ID?

In many cases you will be exporting time to enter into another system. A pure data range search my provide misleading / unposted data.

For example if you run an export for the date range 1/7/11 to 31/7/11 and someone entered time for the 31/7 on the 1/8 then this time entry would not be exported in the first export as it had not been created.

If you then ran another report for 1/8 to 31/8 the entry would not show either – it was for the 31/7.

Every time entry is allocated a UID. It is more robust to export an ID range and then pick up the UID+1 for the next date range.

Continuing the example above the date to which the time entry referred is immaterial and the entry would be posted next time the export was run from UID +1.

Information Displayed

We display all information we hold about the time entry.

The descriptions are in the main self explanatory and will not be repeated in this user guide.

There are four fields that need additional explanation. These are “External” codes that let Traffic LIVE hold details of codes used by other systems so that the data can be tied together and posted.

These are

External User Code	The code by which the member of staff is known as in the other system. For example Tom Smith might be known as TOMS01 This code is set Admin against the staff member

External Company Code	The code by which you client company is known as by the other system. For example Sohnar might by SOHN01 This code is set in Contacts.
External Job Code	The code by which the job is known as by the other system. For example J205 in Traffic LIVE maybe known as 5673 in the other system. This code is set in Job Add / Edit in the Job Details tab.
External Chargeband Code	Traffic classifies activities by Chargeband. Eg Design , proofing etc. The other system may or may not goto this level of detail. This maybe known as an activity code or similar. This code is set in Admin against the chargeband.

Exports

Clicking “Export” will give you a dialogue allowing export of a generic format (everything you see on screen) of formats for specific providers.

We currently support a generic export format and specific ones for Adserve, Concepts and Donovan Data Systems – Brand Ocean.

The Standard, Adserve and Concepts exports are in CVS format. The Brand Ocean format is in XML and creates a separate XML file for each time entry.

These exports have been checked by the various providers however it is essential that you first test that the format works in your system before seeking to use them in anger. System versions and setups do vary, and the provider will be able to best advise how this information is imported.

From the dialogue select the export type.

If there are more than 100 records returned then the results are “paged”. Form the second box you can choose to either export only the current page, or all pages of data.

If you export all pages you will see the progress wheel do one circle on the screen for every page that is read and sent to the export file. The time this will take is not excessive per page – maybe 1 or 2 seconds, however if you have say 10 pages of data the delay will be noticeable.

Finally you can choose to export all data, or just the data that you have filtered in the view.

My Export Format is Not Listed

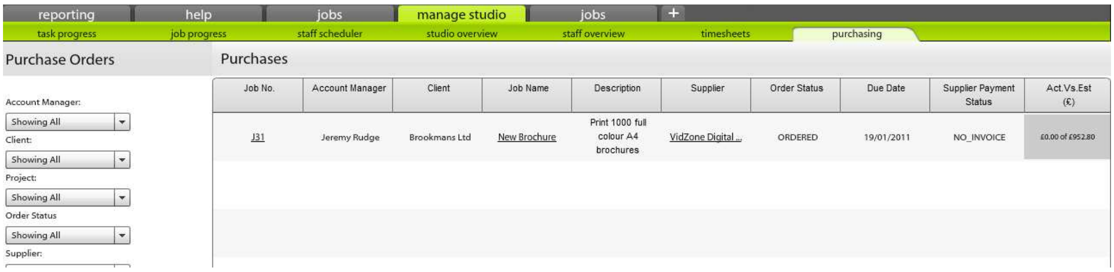
If you can send us the format you require we will look at including it in our next release.

As much information as possible would be appreciate with example data. The devil is in the detail, and things like is time in hhmm or decimal, what is the time increment (minute or 0.1 of an hour etc.). are all relevant.

We do not charge for adding your export format.

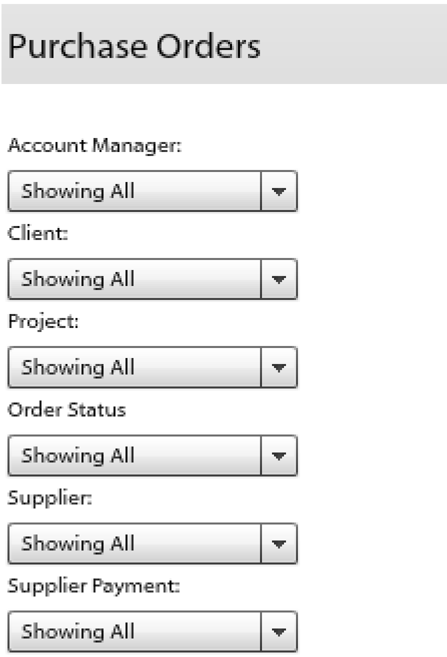
Purchases

Purchases shows the status of all purchases in the system within the date range specified.



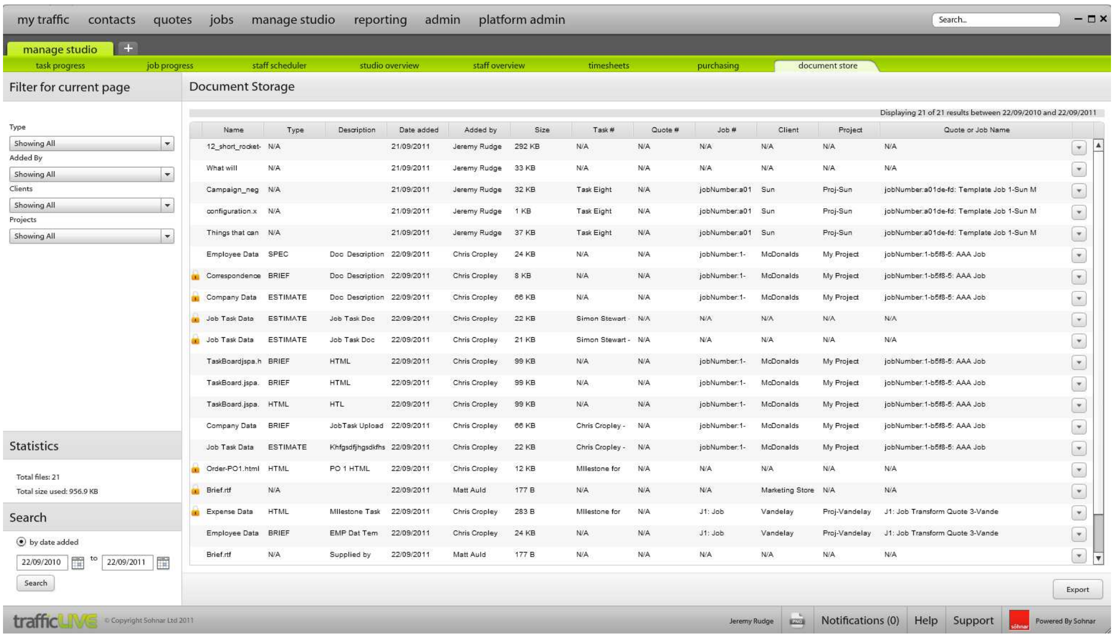
The fields are as set in Jobs / Purchasing and are self explanatory.

The view maybe filtered using the filters on the left of the screen.



trafficLIVE
Scheduling creative business online

Document Store



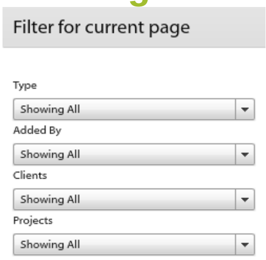
The document store allows you to review all of the files stored in the system, open and delete files, and see how much storage you are using.

You cannot save files in this view – that is performed in context across the application wherever you see the “Doc Store” button.

Searching for files

Files are returned for a given date range using the search facility in the bottom left of the view

Filtering the View

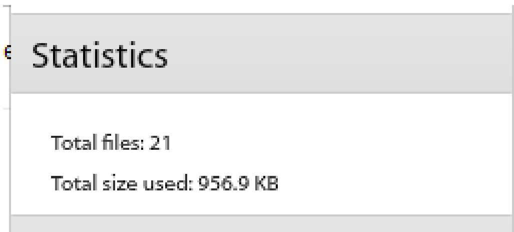


You can filter the view using the filters on the left.

The columns can be sorted by clicking on their header column

Volume of documents stored

The statistics column on the left hand side shows you the total volume of documents stored.



You are charged for the volume of document stored on our servers. Whilst your plan may vary, this is typically an allowance per user – aggregated at client level. For example if you have 20 users, and the allowance per user is 100mb then the company has a limit of 2gb.

Excess storage is charged at a rate per 100mb or part thereof per month.

How much storage can I use?

There is no limit to the volume of files and documents you may store with us. There is no need to book or pre purchase storage, simply use it and it will be reflected in your monthly invoice.

How much storage will I use?

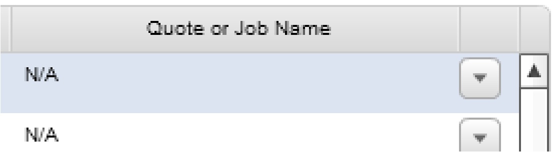
It depends on what you store! To give you an idea the author of this guide has used 2gb in 15 years. This comprises every document, presentation and spreadsheet created since 1997! However … as soon as you start using multimedia files the file storage consumed will grow significantly.

File "Tagging"

All files stored are "tagged" so that we can retrieve them in context. We currently tag documents to a client, project, job, quote and task in addition to the job name. You can see these tags listed on the screen.

Opening / Downloading / Deleting Files

At the end of each row there is a down arrow button.



Click and you will be given the option of

- download
- open
- delete

Download Downloads the document.

Open	the first time this document is opened we must download it so that it can be opened by the application on your computer. Once downloaded it will be opened.
Delete	If you have permissions to delete documents you will be able to delete after confirming your action. ONCE A FILE IS DELETED IT IS GONE – IT CANNOT BE RECOVERED. IF YOU ARE ALLOWED TO DELETE DOCUEMENTS PLEASE USE THE PRIVILAGE WISELY!

Reporting

Traffic Live has powerful reporting, or more properly analytics.

Outside of the "Reporting" tab please remember that there are plenty of places in the system that will give you lists of tasks, lists of time, lists of invoices, lists of quotes, lists of jobs, lists of purchases and so forth. Nearly all of these can be exported and if you are seeking simple list information these are most probably a better source of data.

Reporting is all visual and allows you to visualise and analyse much of the information held within the system. Once you have created your masterpiece you can save it to run it again at a future date.

Reporting currently focuses on Jobs, quotes, people and capacity.

Reporting is powered by "Grids" that are loaded into Traffic LIVE and then queried by dragging and dropping values.

This gives rise to some incredibly powerful reporting capability, HOWEVER please take a little time to play with it and understand what it is capable of and what it is telling you.

We have chosen not to give you "flat" reports where we made the decisions for you. This would have been far simpler for us, and as long as we were able to second guess your requirements it might have been simpler for you – however you would not have been able to manipulate and analyse data on the fly – and we know from almost 10 years in this business with a previous system that held over 120 reports that second guessing individual requirements is almost an impossibility.

Please note that some reports can rely on extensive data sets. This does not take long to travel over the internet (typically less than a second), but once it arrives we create a huge multi dimensional array called an OLAP cube. Think of this as an Excel pivot table on steroids.

Depending on the volume of data returned, the capacity of your computer, its available memory and what else it is doing at the time, these may take some time to build. During this time the application will be unresponsive and may show the message “Not responding”. It is difficult to give a precise guideline as to how long a cube will take to build – lets say upto 30 seconds as a guide, but there are many variables.

The relationship is “cubic”, what this means is that for every additional record the volume of data doubles. As your chosen data set gets bigger and bigger the size of the grid increases exponentially and the processing time gets commensurately longer – possibly minutes. Once built, the data should visualise rapidly, it is only the initial build of the “cube” that takes time.

If build times are excessive please try a smaller date range.

If you would like to know more about OLAP cubes this may help.
http://en.wikipedia.org/wiki/OLAP_cube

Getting Started

Open Reporting. You will be presented with a drop down list at the top of the screen and a date range. There are currently four reporting grids in the system.

Job Time and Money

- The date range refers to WHEN THE JOB WAS CREATED

Time / Bookings with financials

- The date range refers to WHEN THE TIME WAS LOGGED, OR WHEN THE TIME IS BOOKED

Quote Reporting

- The date range refers to THE DATE THE QUOTE WAS CREATED

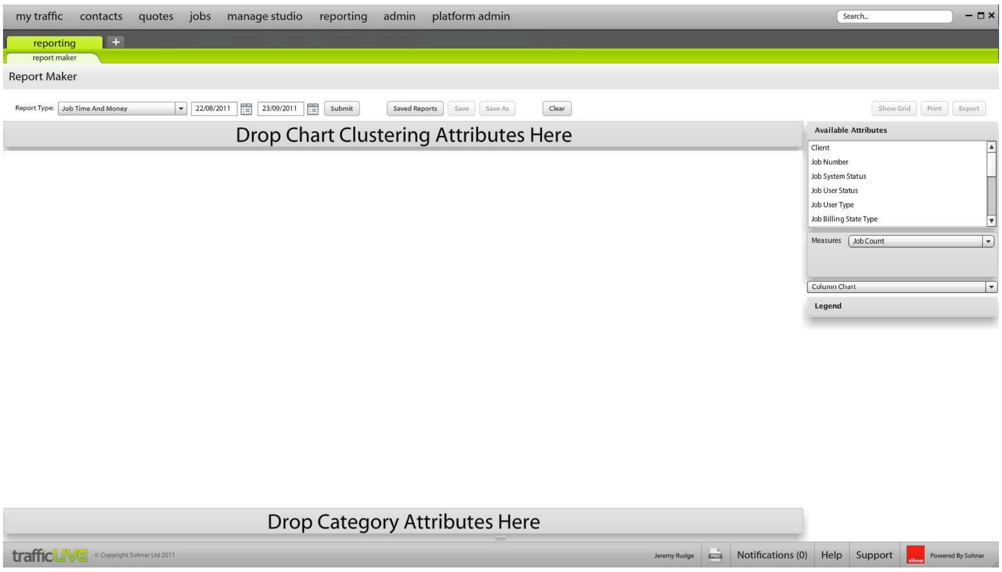
Employee Utilisation

- The date range reflects the period that you wish to look at and brings together all data required – regardless or job dates etc. to give you a correct picture.

Select one of the grids, a date range and click submit.

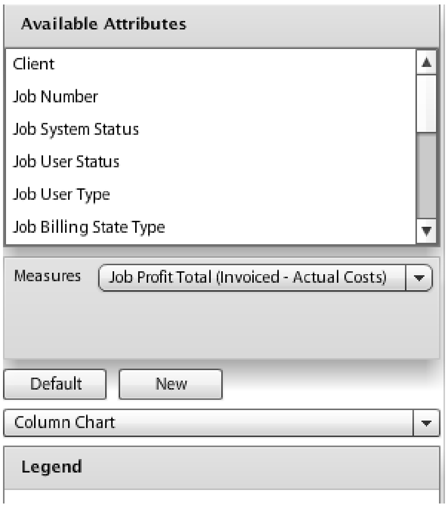
Your data will load. The more data that is loaded the longer this will take. Either way the delay should only be a few seconds, however processing that data may take longer as per the above.

Your view will look similar to below



Attributes, Measures and Chart Types

The top right of the screen shows attributes, measures and chart type. These allow you to select what Traffic LIVE is telling you.



Attributes

Attributes control “I want to see information by …”.

To use an attribute, simply drag it onto the grid and drop it on the Category Attribute or Clustering Attribute landing pad. For now Drag say Client onto the Category Attribute landing pad.

The available attributes vary by the reporting grid loaded. The available attributes are covered in the sections that follow.

Measures

Measures are things that you want to display that relate to the Attribute.

For example “I want to show all time logged (the Measure) by client (the Attribute)”

Nesting

The real power comes from more complex and nested queries. Using simple drag and drop you can expand

“I want to show all time logged (the Measure) by client (the Attribute)”

To

“I want to show all time logged, and the cost of that time by client, broken down by project and job”

To achieve this you simply drag more attributes onto the Category Attributes Landing Pad. Examples will follow.

Clustering

The next level you can go to is to cluster data. To do this you simply drag attributes onto the Clustering landing pad at the top of the screen.

This then lets you expand

“I want to show all time logged, and the cost of that time by client, broken down by project and job”

To

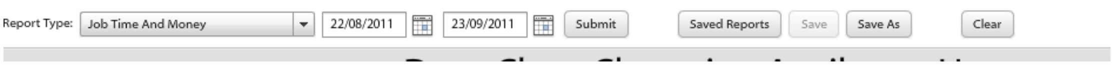
“I want to show all time logged, and the cost of that time by client, broken down by project and job and then summarised by Job type.”

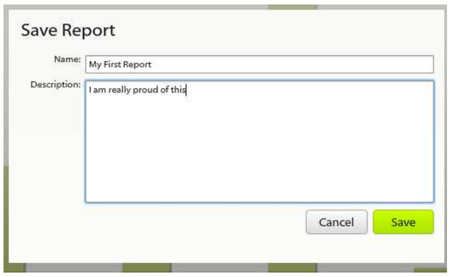
This would then result in multiple graphs on the screen showing the required information by – in this example – job type.

Saving Reports

Once you have created your report you can save them.

Click “Save As” at the top of the screen.



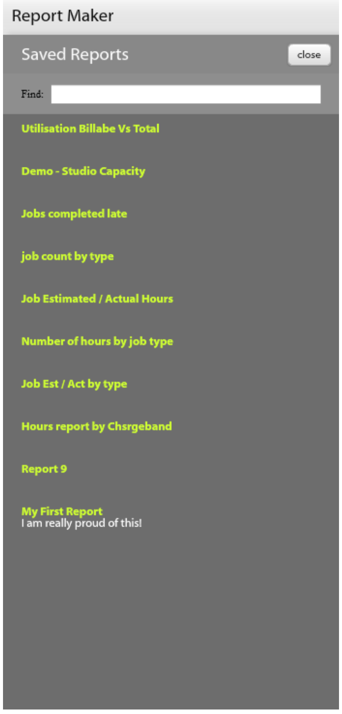


Complete the name and description and click SAVE.

Tip: You can search reports by name and description, so to make reports easy to find make sure you use a meaningful name and description. As a business you may wish to agree how you are going to name reports so that all users can understand what is going on!

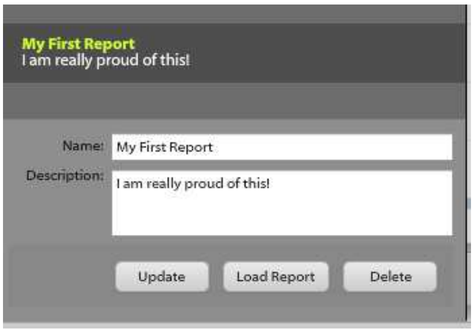
Recalling a saved report

Click on Saved Reports in the top bar



To narrow down your list type into the find box. The list will filter as you type based on the contents of the name and description.

Click on the chosen report and its details will be shown



You can edit the details and click update, delete, and load the report.

When you load the report it will load using the currently set date range. If this date range is not what you were after, change it and click submit. The report will reload with the new date range.

The Type of Chart is not stored with the saved report, so you may need to choose the most appropriate chart type for the data you are looking at.

What can I report on?

What you can report on depends on the “Reporting Grid” loaded.

Will you create reports for me?

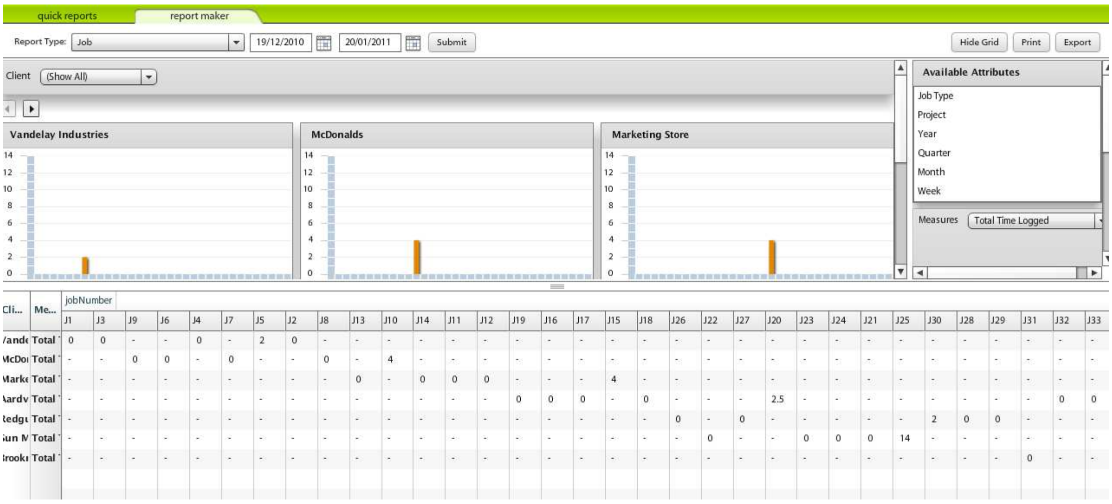
Yes we do offer a report creation service. We will create them in real time for you over the telephone. We charge per hour or part thereof.

Reporting is complex and as you will see below has a huge number of fields to choose from. Much as we would like to even the people who write the code cannot remember every field and what it does. Additionally understanding exactly what you require takes time – so please work with us!

Accessing the underlying data

Once you have built your report, clicking “Show Grid” will split the screen and show you the underlying data that drives the report you have created.

This data can be exported to Excel for further manipulation by clicking Export.



Please note : we have a known issue with exporting to Excel. The "measures" are placed in the top left hand corner of the grid. If you have more than one measure this will push the top column one grid over per additional measure.

As such the data in the export **will not line up when you have multiple measures.** This can be "fixed" by deleting these cells. We apologise for this and we are working on a fix. The challenge is that handling multi dimensional arrays causes the data to be structured in a certain way that makes solving this challenging.

Printing

Click Print and the visible portion of the screen will print.

Chart Type

You can select from Column Charts (default) Line Chart, Stacked Area Charts and Pie Charts.

Simply use the drop down and your chart will be redrawn.

Job Time and Money

Attribute	**Detail**
Account Manager	The Account Manager responsible for the client
Client	The Client Name
Job Billing State Type	The billing status is either Unbilled, Part Billed or Fully Billed. NOTE : The ONLY time we can give you an accurate profit figure on a job is when it is fully billed, so Billing Status is important when looking at profit information
Job Completed Past Internal Deadline	This is a TRUE / FALSE indicator. If a job was completed past the INTERNAL deadline then this will be TRUE.

	The definition of completed is the date at which the job status was changed to COMPLETED. If you change the status away from completed and back to completed again the completed date will reflect the date it was last changed.
Job Completed Past External Deadline	This is a TRUE / FALSE indicator. If a job was completed past the EXTERNAL deadline then this will be TRUE. The definition of completed is the date at which the job status was changed to COMPLETED. If you change the status away from completed and back to completed again the completed date will reflect the date it was last changed.
Job Created – Month / Week	When the job was created
Job Deadline –Month / Week	The job deadline
Job Number	Job number!
Job Number – Job Name	Concatenation of Job Number and Job Name
Job System Status	The system status as determined by the system – Draft, In Progress, Completed , Declined

Job User Status	The job user status. The values of this status are as set up by your system administrator in admin
Job User Type	The Job Type (Design, print etc). The values of this type are as set up by your system administrator in admin
Last Invoice Issue Date – Month	The month in which the job was last billed
Project	The Project Name

Measures	**Detail**
Days Past Deadline (internal)	The number of days past the internal deadline that the job was completed.
Days Past Deadline (external)	The number of days past the external deadline that the job was completed.
Job – Estimated Time Income	The estimate income from Time and Fees
Job Actual Costs Total	The total costs incurred on the job. The elements of this are as above
Job Actual Expenses	The actual expenses incurred, excluding margin
Job Actual Purchases	The actual purchases against the job

	(as set in the Manage Purchase dialogue) excluding margin
Job Client PO Value	The PO value on the job. The PO value is a number. It is assumed this is in base currency.
Job Count	The number of jobs in the dataset being reviewed
Job Estimate Purchases	The estimated Purchases against the job
Job- Estimate Total Income	The expected income from the job (hence including margin) of time, fees, 3rd Party and Expenses.
Job Estimated Expenses	The estimated expenses of the job excluding margin
Job Estimated Hours	The hours that you estimated the job to take
Job Invoiced total	The total of all invoices issued excluding sales tax
Job Profit Total (Invoiced – Actual Costs)	The total invoiced on the job less all costs. All costs include - Labour at the hourly rates for the person logging the time as set in admin - The actual cost of 3rd Party purchases - The actual cost of expenses

	logged to the job NOTE : This measure needs to be used in conjunction with the Billing Status attribute to give meaningful information. If not billings will = 0 and hence the jobs will show a large loss.
Job Scheduled Hours	The hours of the job that have actually been scheduled to a person to do. (Comparing this to Job estimated hours will give you some idea of the "hidden" work in your studio)
Job Studio Allocation Hours	The Job Studio Hours – ie the time that you wanted to put into the studio. (Comparing this to Job Estimated Hours and Job Actual Hours will show you if things are starting to go wrong)
Job Time Cost (Billable)	The cost of the billable time against the job. The cost is worked out based on the hourly rate of the person logging the time as set against the staff member in admin
Job Time Cost (Non – Billable)	The cost on non-billable time logged against the job.

Job Time Logged – ALL Hours	The total hours logged on the job – the sum of the above two
Job Time Logged – Billable Hours	The number of hours (in decimal) of billable time added to the job
Job Time Logged – Non- Billable Hours	The number of hours (in decimal) of non billable time added to the job. Non billable time is set as such when the time entry is added, this is NOT time that you simply decided not to bill at the billing stage.
Unscheduled Time	The allocated time less the scheduled time. Please bear in mind that unscheduled time cannot show in the capacity reports. This figures shows you the scheduling gap.
Value of Expenses	The cost + markup of all expenses.
Value of Job	The total value of the job with reference to the work done. This is the total VALUE you have given to your client. It is NOT reflective of how much you have decided to bill them which maybe more or less than this number. Comparing this value to the billed value shows you how much money is walking out of the door for one reason

	or other.
Value of Purchases	The cost + markup of all purchases
Value of work Done	The value of work done is the hours logged against the job, multiplied by the client sell rate. If a job is running over the value of work done will continue to rise BUT you will probably not bill it. If you wish to analyse the actual income of the job – where the income lines for fees are capped at the amount of the fee this can be analysed in Time / Scheduled Work with financials.

Time and Scheduled Work with Financials

Attributes	Detail
Chargeband	The chargeband of the activity
Client	The client!
Employee	The name of the person who either logged the time or who is assigned to the task
Job Number	Job Number
Job Number – Job Name	Concatenation of Job Number and Job Name
Job User Type	The job type as set on the job. The job types are set by your system administrator in admin
Project	The Project Name
Task Deadline week / month	The Deadline of the Task
Tasks Completed Past Deadline	This is a TRUE / FALSE indicator. If a task was completed past its deadline then this will be TRUE.

	The definition of completed is the date at which the task status was changed to COMPLETED. If you change the status away from completed and back to completed again the completed date will reflect the date it was last changed. Note the task completion date is NOT the same as changing the happy rating to "tick", which only signifies that the person allocated the work is done, not that the whole task is complete.

Measures	Detail
Actual Income for the Task	This reflects the actual income for the task. **The calculation of this depends on the billing type as set in billing. Billing types default based on the line type** - Fee; default = Estimate - Time default = Actual If the line is set to bill to estimate then the value of that line will grow as work is added BUT will never be higher than the estimate. If the line is set to bill to actual then the

	income will continue to grow regardless of how much time is added. If the line is set to Non Billable then income will always be zero. This measure will hence tell you what the task is really worth to you on the assumption it is billed as planned. Note: The value here will be different to the actual job value shown on Job Add / Edit / Time if you have fee lines that are over time. That view is showing you value of work done, not its billable value.
Approved Allocated in Time Range	For the date range selected the allocations (bookings) that are approved (as opposed to being in a Pending state awaiting approval)
Days Past Task Deadline	How many days past the task deadline was the task set to complete
Invoiced Amount for the task	The actual amount invoiced on that task. This is always reported in the base currency of your system (ie a job billed in USD in a GBP based system will report in GBD not USD)
Job Task Count	The number of tasks in the dataset you

	are looking at
Time Allocated Logged Non Billable Hours	As above, but non billable
Total Allocated Billable Time Entry Cost (and variants)	The cost of the various time logged
Total Allocated Time Logged Billable Hours	The value of billable time logged during the period. If someone helps someone out and selects an item from "All Tasks" in their My Traffic Calendar then this work was **not** allocated to them – it was "unallocated" see below. This measure can give you an indication of workflow leakage for a job / client, or the extent to which individuals go "off piste".
Total Costs	The cost of the hours logged within the date range
Total Hours	Total Hours logged within the date range
Total UnAllocate Time Logged Non Billable	Unallocated non billable time logged as per above explanation
Total UnAllocated Time Logged Billable	Unallocated time logged as per above explanation

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Value of Allocated Work	The value of work assigned in the period. The value is taken as hours allocated multiplied by the chargeband rate for the activity as specified in the job. NOTE: This does not seek to determine if the work is billable, for example if the job is over running.

Quote Reporting

Attributes	Detail
Account Manager	Account Manager who owns the quote
Client	The Client!
Job User Type	The type of the job / quote. Job types are set in Admin and allow consistent analysis of work by type.
Project	Project Name
Quote Anticipated week / month	The month you believe the business will close
Quote Created month	Shows quotes created by month / quarter or year
Quote Deadline week / month	Shows quotes by deadline week, month, qtr or year. Week is expressed in week number.
Quote Number	Quote Number
Quote Number – Job Name	Concatenation of Quote number and name
Quote System Status	The current system status of the quote Draft / Progress / Complete / Declined
Quote User Status	The current user status of the quote. The user quote status's are set by your system administrator in admin
Related job Billing Status	If the quote has been migrated to a job this reports the billing status. Not

	Billed / Part Billed or Fully Billed. The billing status is important as without knowing of a job is fully billed it is not possible to finally determine profit.
Sales Stage	Sales Stage

Measures	**Detail**
Quote Count	The number of quotes in the dataset being reviewed
Quote Estimated Cost Amount	The estimated cost of delivering the quote inclusive of time, fees, 3rd Party and expenses.
Quote Estimated Income Amount	The estimated income relating to this quote including time, fees, 3rd party and expenses
Quote Estimated Profit Amount	Estimated Income less Estimated Costs
Quote Margin (Average)	The margin on a quote. If you are looking at a single quote you will see the actual margin for that quote. If you are looking at more than one quote in a dataset the margin will be the average of all quotes.

Related Job Client PO	The purchase order amount
Related Job Invoices Total Amount	The total billed to the client
Related Job Margin %	The margin achieved on the job based on the total billed and the total costs. Caution : this margin is based on the above numbers. If the job has not been fully billed / is not complete the margin shown will be misleading.
Related Job Profit Amount	The total invoices less the total costs. This amount can be negative (and will be negative if the job has not yet been billed). Caution : this is only the correct profit number when the job is fully billed and should be used in conjunction with "Billing Status"
Related Job Total Costs	The total costs (excluding markup) of the job

Employee Utilisation

Attribute	Detail
Department	The department of the employee
Employee	Employee
Location	The location of the employee
Logged date week / month	The period you wish to report on

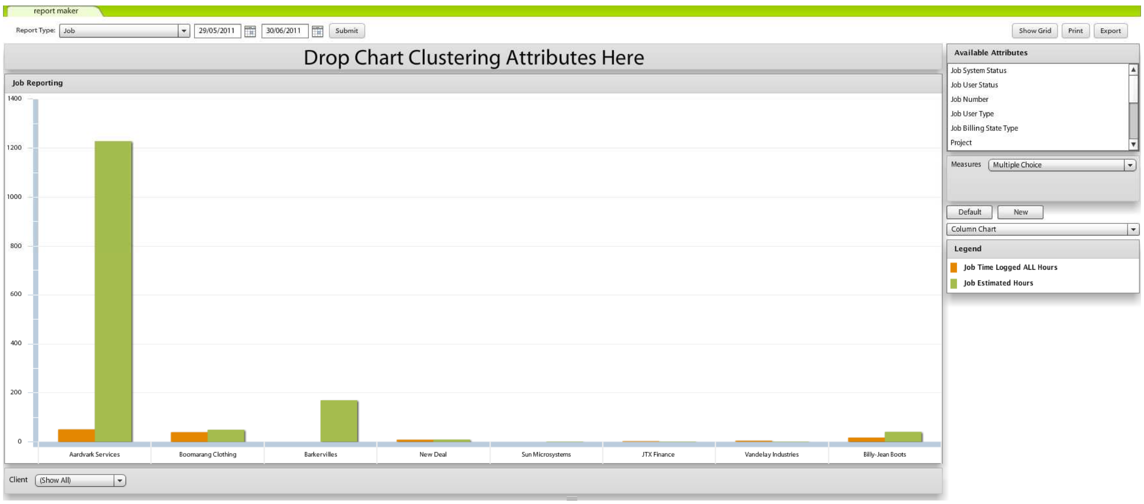
Measure	Detail
Allocated + Booked (Hours)	A sum of the employees allocated and booked time – ie the total time booked in their calendar.
Allocated + Booked / Capacity (%)	The total booked capacity of the employee expressed as a % taking into account work allocation and calendar bookings
Allocated JobTask Hours	Work scheduled to the employee (ie the work they see in their My Calendar view)
Allocated Work Cost	The cost of the work determined as the time multiplied by the allocated persons hourly rate in admin
Billable Hours Logged	The total billable time logged
Booked Time Hours	Bookings in the users calendar
Capacity (Hours)	The capacity of the employee / employee group you are looking at in hours.

	This is calculated using - the date which the employee was enabled (ie before this date they had no capacity as they were not a user, and if they were subsequently disabled as a user then form that point on they had no capacity) - The number of working hours that employee is expected to log per working day as set on their staff record - The number of Working days within the date range specified – ie excludes weekends and days marked in Traffic as non working
Non-Billable Hours Logged	The total non-billable time logged
Time entry cost	The cost to the business – using the staff rate set in admin – of time logged
Total Hours Logged	The total of time logged (Billable and non-billable)
Value of Allocated Work	The value of work allocated to an employee. Caution : This is the value of work allocated to a person, it is not a

	reflection of how much of this will be billed to the client. In particular if the job is in over run the value of work allocated could be high, but your recoverable value lower.
Value of Time Entries	The value of the time entries logged marked as billable. Non Billable entries have a value of zero.

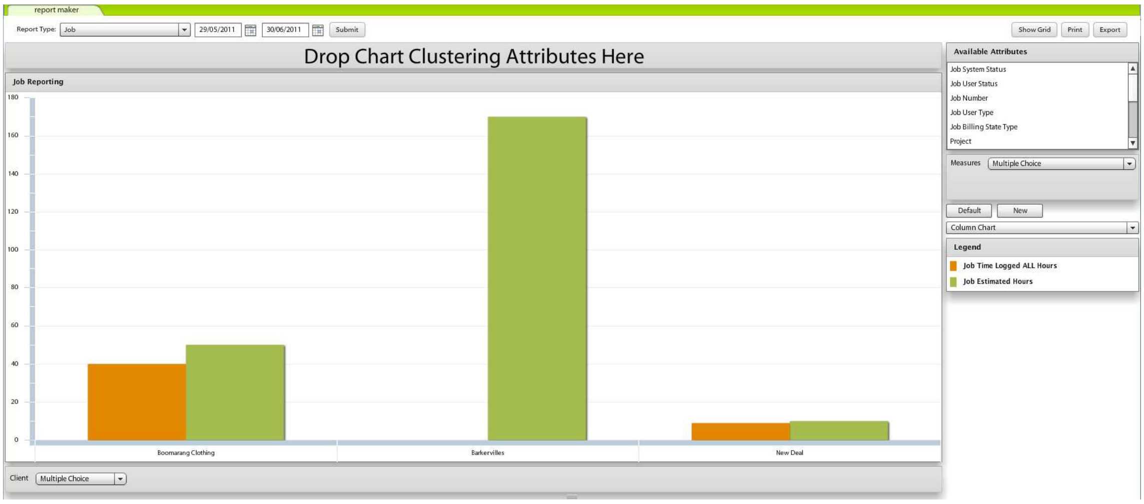
Examples

Below are a series of examples together with a commentary. Take a look. We recommend you practice and play, get stuck? Please just ask.



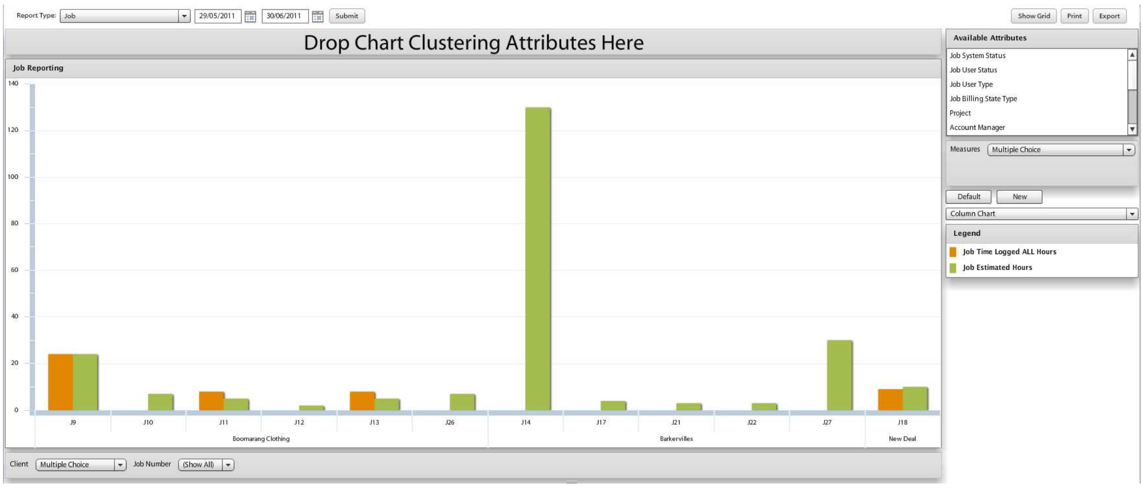
The example above shows hours sold to clients vs time logged. The scale of one client in this example dwarfs the rest.

The Client attribute at the bottom the screen can be filtered so we only look at the few clients we need. Click on the right of it and select the required clients.

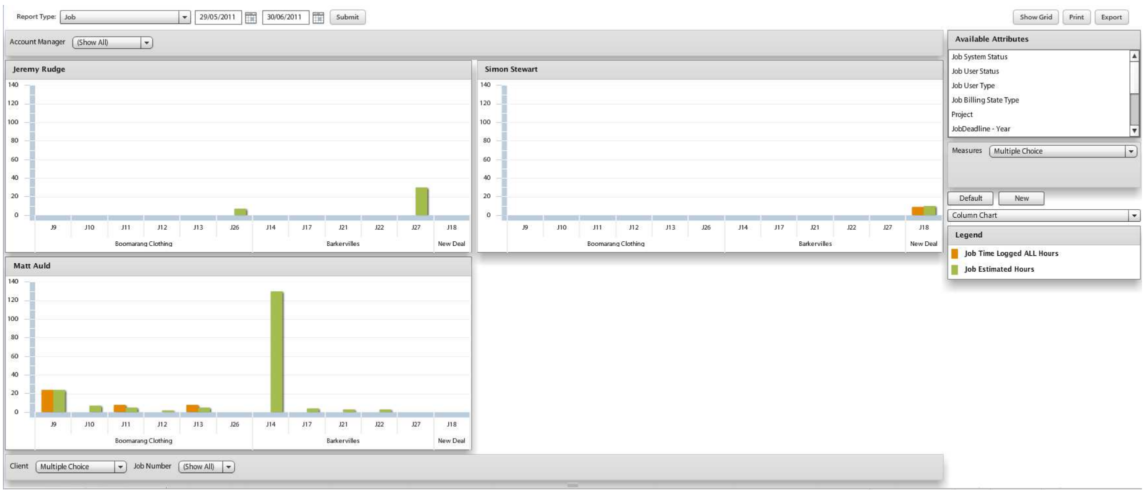


A filtered view is above.

Next we might want to look at which jobs are involved. Simply drag Job No onto the bottom grid.

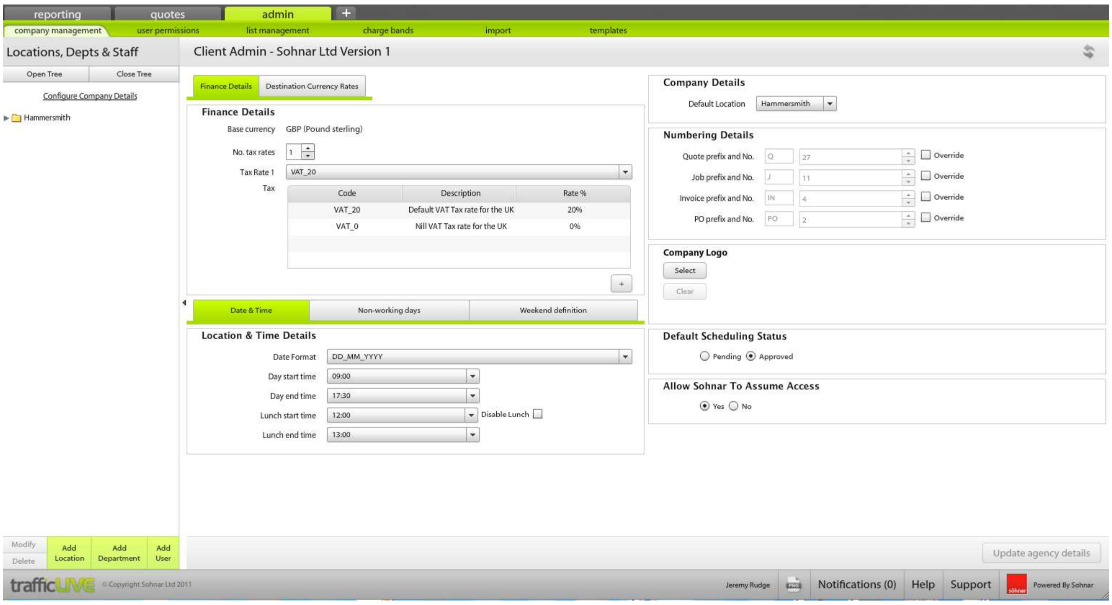


And finally we might want to see this information by Account Manager, so we drag “Account Manager” to the top of the grid**.**



Admin

Admin allows administration of your Traffic system.



Sohnar Support staff can access the Admin section of your Traffic system. Our staff can access the same features as your users with Admin privileges.

We are here to assist you in need, however you do have access to all privileges other than

- turning your company off
- changing your company name
- changing the currency of your company (this is set once only and can never be changed once set. **If you notice your currency is incorrect please do nothing until this has been put right.**

If authorised by you we can log in as a user of your system which will give us access to your data. If you deny us access we have no access to your system other than Admin.

Please never provide anyone with your password. In a truly exceptional case Sohnar may ask for your password if you are having problems that we cannot replicate. In this case please ensure (a) that it really is Sohnar you are talking to and (b) change your password immediately we are finished.

System administrators should be chosen with care. They can set up users, assign permissions (including permissions to access the Admin area) change rate cards and so on.

Admin is comprised of six sections

Company Management

Allows the setting of company defaults, working times, the creation of department and employees

User Permissions

Controls the permissions allocated to users

List Management

Controls the content of all user configurable drop down lists in Traffic.

Charge Bands

Holds details of the rates you charge for goods and services, including client specific rates.

Import

The import of data into your system

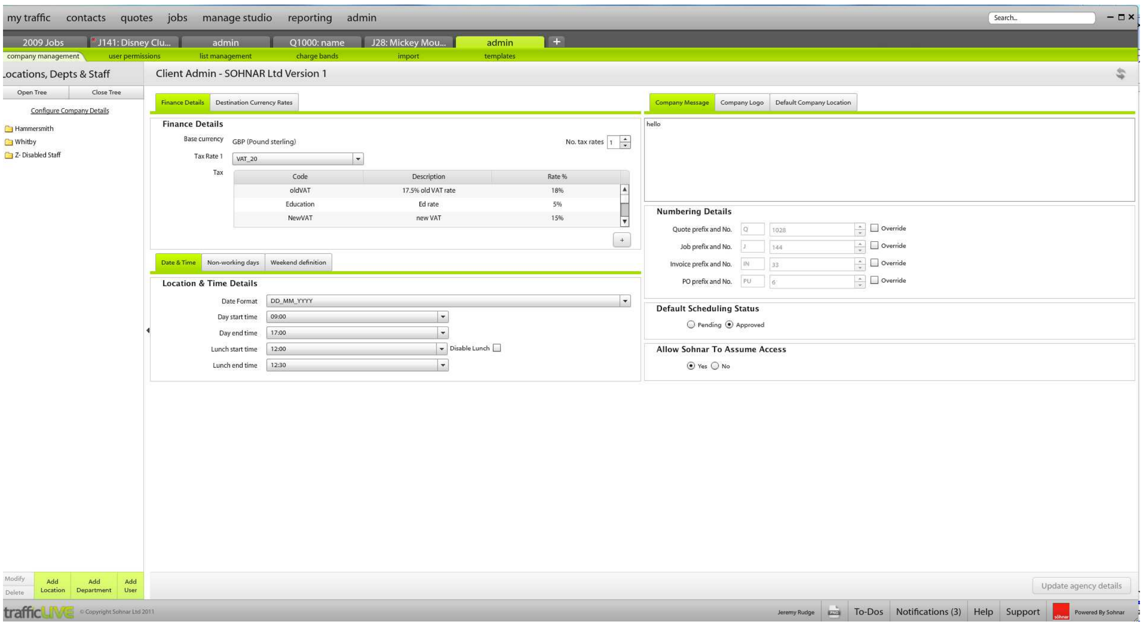
Templates

The setting up of templates for invoices, estimates and purchase orders.

Company Management

Company Management allows the setting of company defaults, the creation of departments and the adding of employees.

Click “Configure Company Details” at the top of the tree and you will see this view.



Company Configuration

The company is configured in this section. The various fields are explained below

Base Currency	Each Traffic system has ONE base currency. The currency can only be changed by Sohnar, and should be set to the currency of your country without you needing to ask. PLEASE CHECK IT IS CORRECT. If it is not

then please STOP and contact Sohnar. We will shoot someone for you and put it right.

Number of Tax Rates	Traffic allows you to use up to two sales tax rates. This allows users in countries such as Canada to take account of their local and state taxes. Changing this setting to two will cause an additional tax rate to show – Tax Rate 2. Tip: If you do not use two tax rates you must not set a second rate. Even if you then change the number of tax rates back to 1 the second rate will still be used in calculations.
Tax Rate 1 /2	A drop down to select the first and second default tax rate. The tax rates are defined in the table below the tax rates.
Tax	This is the table of tax rates. To add a new tax rate click "+" at the bottom of the grid.
Date format	Allows selection between UK and US date formats
Time Zone	The time zone of the company

Day Start Time	The time you usually start work. This is used by scheduling.
Day end Time	The time you usually stop work. This is used by scheduling, and is also the default end time of jobs.
Lunch Start Time	The time you usually start lunch. This is used by scheduling and will schedule people around lunch time. The actual time they take lunch is relatively immaterial – what is important is that the duration of your standard lunch time is correct which will ensure that all staff members are scheduled the correct amount of work.
Lunch End Time	The time you usually end your lunch.
Disable Lunch	If you wish to disable the automatic scheduling of lunch check this box
Non Working Days	You can configure your own non working days. Click Add. You may specify a non working day as a whole day, a morning or an afternoon. Automated scheduling will schedule around these non working times. Tip: Traffic LIVE does not make retrospective

changes, so if you add a company away day for example, jobs that were in train before this will need rescheduling.

Weekend Definition	You can determine your own weekends. Attractive as this may sound this is principally to allow countries such as the arab states to configure Thu / Fri or Fri / Sat weekends.
Default Location	Traffic allows you to set us as many locations as you require for your people (see below) here you select the default
Numbering Details	Here you can set the Prefix and next number sequence for Quotes and Jobs. You can use any prefix you choose – a year for example. You should ensure that you prefix / suffix is not overly long as it will most likely truncate in some views, particularly for users with low resolution monitors. Whilst the system will not technically mind, you should avoid creating duplicate number sequences as your users will find it confusing. To change a number you must first click “Override” next to the number. This is required to tell Traffic LIVE to save the value you have entered. Without this someone in admin could inadvertently reset the numbers each time they

clicked save.

Tip: If you are changing number sequence you should ideally ensure that non one else is using the system at the time.

Company Logo	Your company loge is shown in several places through Traffic. Click Browse and upload it here
Default Scheduling Status	Forces Traffic to schedule in either the Pending or Accepted mode. This is described elsewhere in the user guide, but in essence controls if scheduled work enters the workflow immediately or after approval
Allow Sohnar to Assume Access	Sohnar support staff are able to access your system if this setting is set to yes. If this setting is set to no, Sohnar staff can only access the admin section of your system. When Sohnar enter your system they assume the identity of the employee that they are seeking to assist, see the same permissions and so on.

Foreign Currency Rates

Traffic LIVE allows you to

- issue quotes in foreign currency
- issue invoices in foreign currency
- make suppliers purchases and raise POs in foreign currency

All transactions in Traffic LIVE exist ONLY in the base currency of the system, but are translated to the currency amount for the issue of quote, invoices and POs as above. As such if you have a system denominated in sterling and quote a client for example US$100,000 for a job Traffic LIVE will reflect this as a job valued at some GBP 60,000 in all financial figures and reporting.

Each Quote / Job has an exchange rate allocated to it.

This rate is either

a. typed in manually
b. the current exchange rate populated automatically from rates provided by Yahoo Money
c. a company rate entered here in admin.

Rates provides by Yahoo are provided by Sohnar for your convenience. Sohnar makes no warranty as to the appropriateness of the rate provided, and **users must ensure that the rate returned is within the bounds of their anticipated value**. Sohnar can accept no liability for loss or damage if a rate provided ultimately turns out to be incorrect.

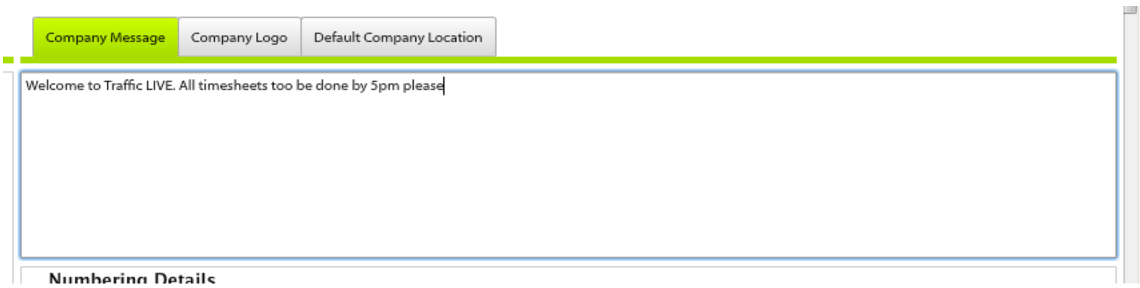
The Yahoo Money rates are provided as is without adjustment or loading.

To enter foreign currency rates simply enter the rate in the “Destination Currency Rates” table.

The rate is “what do I need to MULTIPLY my base currency by to get to my foreign currency amount.

Adding a Company Message

To welcome your users with a localised message enter it here



All users will see this message when they login.

The Traffic Hierarchy for Employees

Traffic holds employees in a hierarchy of

Location
Department
Employee

If you have three offices for example you would add these are three locations.

Of note is that departments are NOT attached to a location. If you have a department – Creative for example you could have the Creative Department spread over 2 locations. Example

London

Creative

David

John

Sydney

Creative

Bruce

Tony

David, John, Bruce and Tony are all a member of the Creative Department, they just happen to be in two locations.

Adding a Location

Click Add Location button at the bottom of the left panel.

Enter a location and click “Create”

Adding a Department

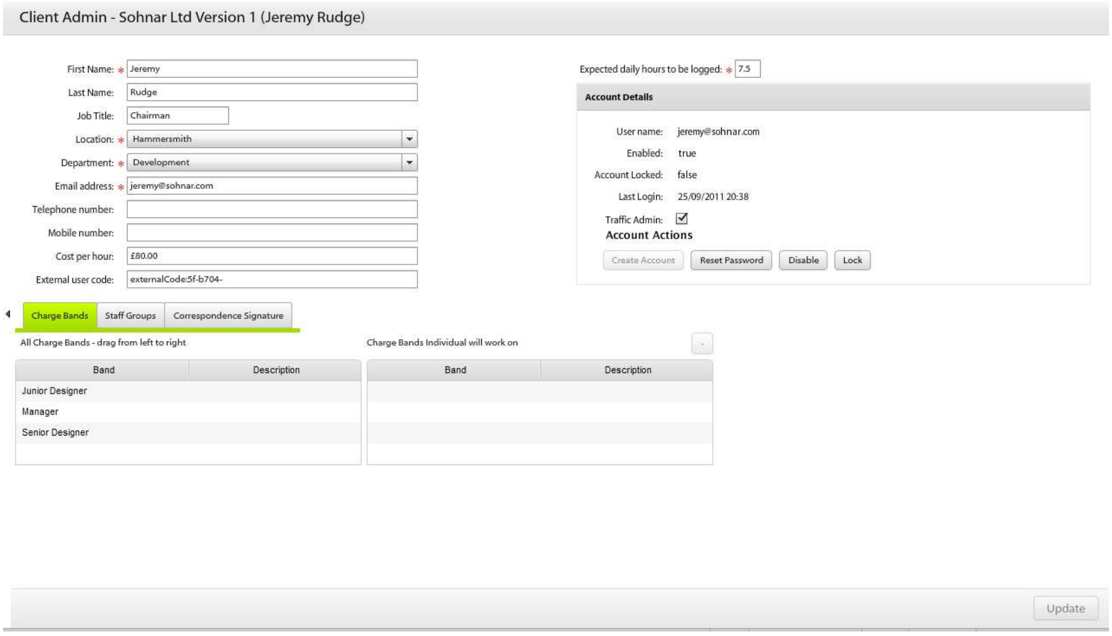
Click Add Department button at the bottom of the left panel.

Enter a Department and click “Create”

Adding a User

Click “Add User” at the bottom of the left hand column.

The right hand panel will display user details.



The fields are mostly self explanatory.

Of note are :-

- Cost Per Hour

This is used by Traffic to calculate the cost of work done which then calculates job profit.

It is important that this figure is accurate and takes into account the salary of the person PLUS the cost of employing them, providing a desk, heat, light etc. This is typically double the salary cost.

Tip: Some businesses do not use real salaries, but instead use bands where for example all Junior Designers have a set cost of £30 per hour regardless of their true salary. This is useful to stop people reverse engineering peoples relative salaries.

- Expected daily hours to be logged

Time reports are all relative to the hours a person is expected to work.

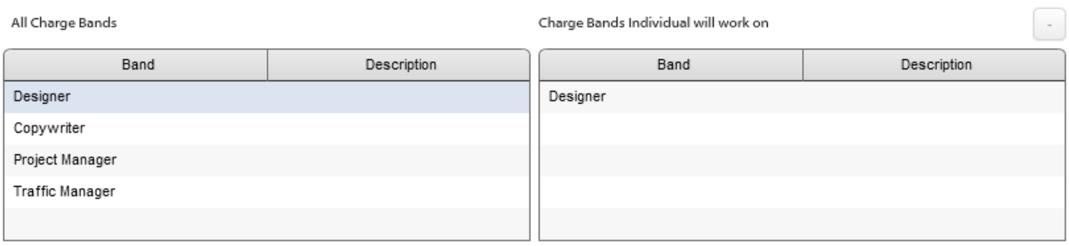
- External user Code
    - If Traffic LIVE is interfacing with other systems, the external code is the code by which the employee is known in the other system. For example Tony Smith maybe known to your accounting system as “tsmith01”

Recording the Skills of each Staff Member

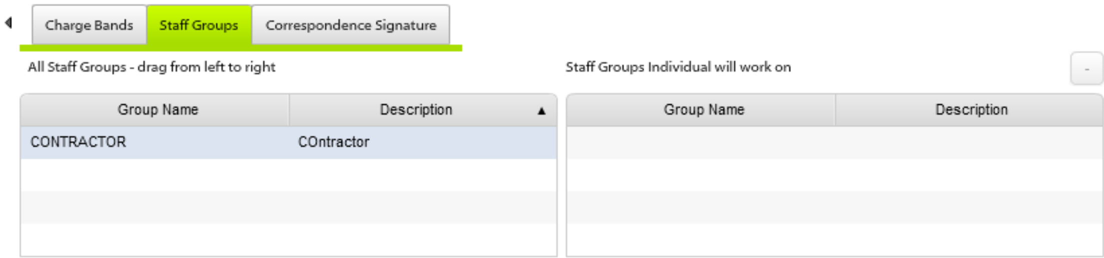
Traffic Scheduling shows the people who can do a job, in order of availability.

This is driven by recording which Charge Bands staff are most suitable to work on.

This is set by dragging the relevant Charge Bands from the left hand list of All Charge Bands to the right hand list of Charge Bands Individuals Will Work On.



Staff Groups



Staff maybe assigned to groups for scheduling purposes.

The groups are set up in “List Management” – see later in this Admin section of the user guide.

To add staff to groups simply drag and drop from the left list to the right list.

You may use groups to bring together any groups of people useful to you and people may be a member of as many groups as you choose.

Examples could be

- pitching teams
- client team
- teams of technical people you have working together using pair programming for example.

Creating A User Account for an Employee

You must first Create the employee by pressing SAVE before you can create an account.

The account details section contains details of the employees account

User Name	Their Traffic user name. This is always their email address. If a user has access to more than one Traffic system they MUST use different email addresses during registration
Enabled	Users can be enabled or disabled (as opposed to being deleted which would remove historic information).
Account Locked	Accounts will lock after 5 failed password attempts. You will need to click “Reset Password” and they will be issued an e-mail with a temporary one time password.
Last Login	The date the user last logged in
Traffic Admin	On a Traffic Admin can create another Traffic Admin. Only Traffic Admins can

- Set or change account permissions
- Lock accounts
- Enable accounts

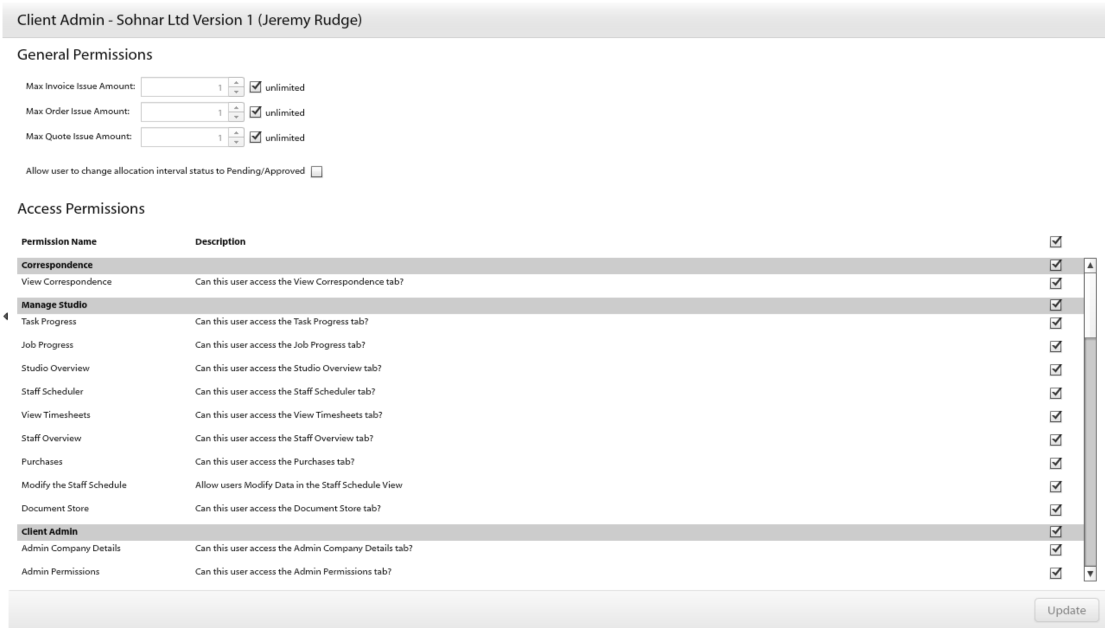
This feature allows you to grant other permissions to access Admin but to ensure that their ultimate level of privilege is limited

Create Account	Will send a welcome email to the user including links to Traffic, passwords etc.
Reset Password	Will send a password to the user following account locking, or due to their password being compromised.

User Permissions

User Permissions set what users are allowed to see and do in Traffic.

Note : Traffic is regularly updated. If any new permissions are added to Traffic LIVE then their default status is usually OFF. If any are to default to ON then this will be covered in the release documentation. This may mean that your team – even administrators – will need to first enable new permission controlled features before using them.



User Permissions can either be changed individually by selecting them from the left hand tree, or in groups by selecting multiple staff members using Shift Click or Ctrl Click on a PC or Shift / CMD Click on a Mac.

The permissions are presented by section using descriptive wordings that will not be repeated verbatim in this guide.

My Traffic	
My Calendar	Can this user access the My Calendar tab?
My Jobs	Can this user access the My Jobs tab?
My Quotes	Can this user access the My Quotes tab?
My Traffic	Can this user access the My Traffic tab?

For a user to access an area, click the check box, to restrict access leave it blank.

In general if you restrict access to a function the user will no longer be able to see the function. If you remove all permissions relevant to a section then the menu item will disappear from the top navigation in Traffic.

Most permissions apply to specific areas of Traffic.

Any general permissions are at the top of the permission list. These impact more than one area of the system.

The current general permissions are

Issue limits on

- invoice
- estimate
- purchase order

If limits are set users will not be able to issue the above where the base currency equivalent of the document exceeds the limit shown.

Clients who are Sarbanes Oxley compliant should consider setting these limits.

- Allow User to change allocation interval status

This function enables users to Approve workflow items in Job Schedule and Staff Scheduler.

Tip : When allocating permissions consider what you really want to restrict people seeing. There maybe some clear areas that you wish to restrict, but don't be too severe – Traffic LIVE is all about sharing information.

Permissions Listing

All Traffic LIVE permissions are listed below.

.

Tab	Sub Tab	Permission / Notes
My Traffic	My Jobs	Can this user access the My Jobs tab?
My Traffic	My Quotes	Can this user access the My Quotes tab?
My Traffic	My Traffic	Can this user access the My Timesheets tab?
My Traffic	Move Calendar Allocations	Allow users to move their own Calendar Allocations?
My Traffic	My Calendar	Can this user access the My Calendar tab?
My Traffic	View other people's calendars	Allow users to view other people's calendars?
My Traffic	All Tasks	Can this user access the All Tasks tab?
My Traffic	My Settings	Can this user access the My Settings tab?
Contacts	Contacts	Can this user access the Contacts tab?
Contacts	View Employee	Can this user access the View Employee tab?
Contacts	View Address	Can this user access the View Address tab?
Contacts	OrgChart	Can this user access the OrgChart tab?
Contacts	View Company	Can this user access the View Company tab?
Contacts	Modify Contact Data	Allow users to Edit or Delete Companies/Address/Employees from the Contacts Area?
Contacts	Contacts Sheet	Can this user access the Contacts Sheet tab?
Contacts	Export From Contacts Sheet	Allow users to Export the Contacts Sheet to file?
Jobs	Create Template From Job	Allow users to create a Job Templates
Jobs	Job Schedule	Can this user access the Job Schedule tab?
Jobs	Job Add/Edit	Can this user access the Job Add/Edit tab?
Jobs	Linking to Add a Job	Can this user access the Linking to Add a Job tab?

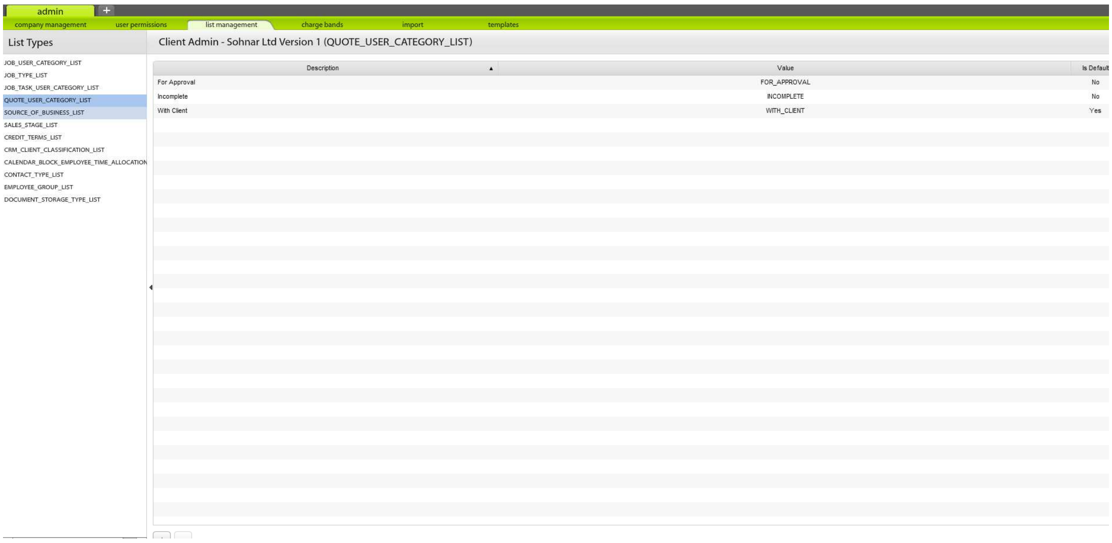
Jobs	Invoice Export	Can this user access the Invoice Export tab?
Jobs	Modify in Job Schedule	Allow users to Modify Data in the Job Schedule View
Jobs	Modify in Job Add/Edit	Allow users to add, edit or delete in the Job Add/Edit View
Jobs	Delete expenses	Allow users to delete expenses from the job add/edit expense grid
Jobs	Delete Time Entries from Jobs Dialog	Allow users to Delete Time Entries from the Time Entry Dialog Box via the Job Add/Edit View
Jobs	Modify Job Template Structure	Allow users to Rename or Delete Templates and Groups from the Job Template area
Jobs	Access to the Job Add/Edit Billing sub-tab	Allow users to access the Billing Sub Tab in the Job Add/Edit view
Jobs	Change Internal/External Job Deadlines	Allow users to modify the Internal or External Deadline Date once the Job has been created in the Job Add/Edit View
Jobs	Access to the Cost Related Job Information in Job Add/Edit view	Allow visibility of the Job Financial Analysis Panel, Time Cost Column, Time Markup Column and Time Act vs Est Column.
Jobs	Open Job Report in Job Add/Edit view	Allow users to open Job Report document in the Add/Edit Job view
Quotes	Create Template From Quote	Allow users to create a Quote Templates
Quotes	Manage Quotes	Can this user access the Manage Quotes tab?
Quotes	Linking to Add a Quote	Can this user access the Linking to Add a Quote tab?
Quotes	Quote Add/Edit	Can this user access the Quote Add/Edit tab?
Quotes	Modify in Quote Add/Edit	Allow users to add, edit or delete in the Quote Add/Edit View
Quotes	Modify Quote Template structure	Allow users to Rename or Delete Templates and Groups from the Quote Template area
Quotes	Modify a Quote once it has been transitioned to a Job.	Allow users to change an existing Quote in the Add/Edit View if it has been transitioned to a Job?
Manage Studio	Studio Overview	Can this user access the Studio Overview tab?
Manage Studio	View Timesheets	Can this user access the View Timesheets tab?
Manage Studio	Staff Scheduler	Can this user access the Staff Scheduler tab?
Manage Studio	Staff Overview	Can this user access the Staff Overview tab?
Manage Studio	Job Progress	Can this user access the Job Progress tab?
Manage Studio	Purchases	Can this user access the Purchases tab?
Manage Studio	Task Progress	Can this user access the Task Progress tab?
Manage Studio	Modify the Staff Schedule	Allow users Modify Data in the Staff Schedule View
Manage Studio	Document Store	Can this user access the Document Store tab?
Client Admin	Admin Charge Bands	Can this user access the Admin Charge Bands tab?
Client Admin	Admin Company Details	Can this user access the Admin Company Details tab?
Client Admin	Admin Manage Lists	Can this user access the Admin Manage Lists tab?
Client Admin	Admin Permissions	Can this user access the Admin Permissions tab?
Client Admin	Admin Output Templates	Can this user access the Admin Output Templates tab?
Client Admin	Admin Staff Import	Can this user access the Admin Staff Import tab?
Client Admin	Modify Company Data	Allow users Delete/Edit Data in the Company Management Area.
Welcome	Welcome Screen	Can this user access the Welcome Screen tab?
Reporting	ReportMaker	Can this user access the ReportMaker tab?
Reporting	Access Employee Utilisation Report	Allow users to access the Employee Utilisation Report
Reporting	Access Job Time and Money Report	Allow users to access the Job Time and Money Report
Reporting	Access Quote Report	Allow users to access the Quote Report

Reporting	Access Time / Scheduled Work With Financials Report	Allow users to access the Time / Scheduled Work With Financials Report
Reporting	Delete Saved Reports	Allow users to delete saved Reports
Correspondence	View Correspondence	Can this user access the View Correspondence tab?
Document Storage	Restricted Access	Allow users to access restricted files
Document Storage	View Documents	Users can view document storage from anywhere in the application.
Document Storage	Create Documents	Allows users to create documents. To allow users to create restricted documents, 'Restricted Access' should be granted
Document Storage	Delete Documents	Allows users to delete documents. To allow users to delete restricted documents, 'Restricted Access' should be granted
Document Storage	Can Access Files Added By Others	Allow users Access files uploaded by others
Document Storage	Can Modify Read Only Files	Allow users to Update or Delete files flagged as ReadOnly
Document Storage	Can Modify Library Files	Allow users to Update or Delete files added as Library files
Document Storage	Can View Library Files	Allow users to view Files Added as Library files

List Management

List Management holds details of the all user defined lists in Traffic.

The lists are described on the left of the view. Clicking on a list type will display its contents.



Adding an item to a list

Click “+” at the bottom of the screen.

You can then enter a Description describing what the status means and a Value which is the value the user will see in their drop down list.

If you wish this entry to be the default setting for the user, check the default box.

Click Done to complete.

Edit an Item in the List

Select the item you wish to edit.

Details of the entry will appear at the bottom of the screen. Edit the fields you require and click Done to complete.

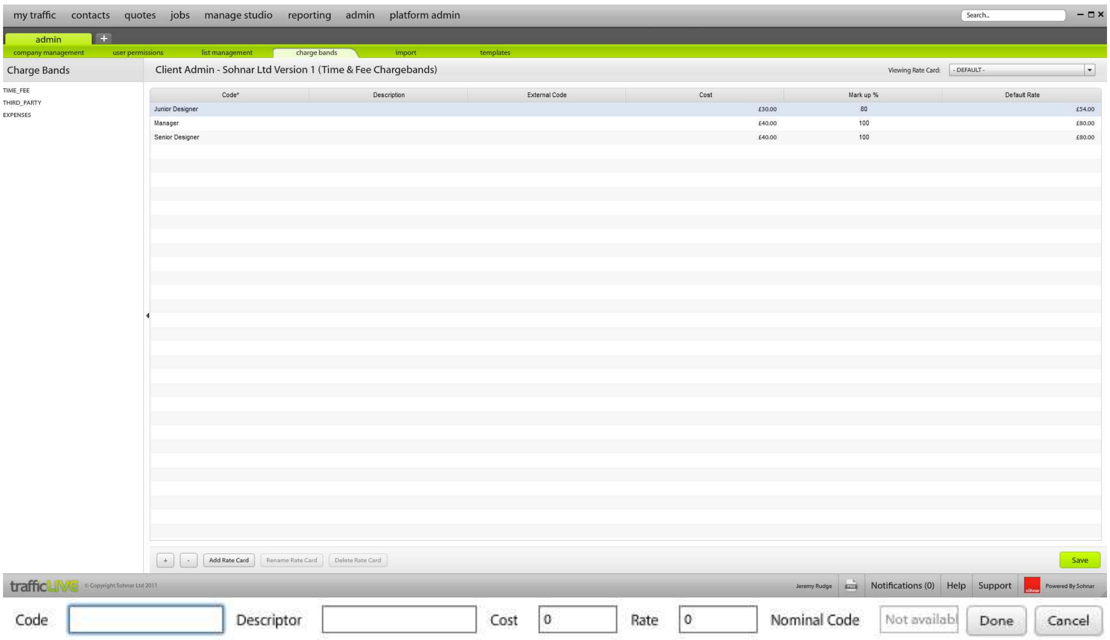
The lists …

List Name	Where it is used
Job User Category List	User status's on jobs. Used to track your internal workflow
Job Type List	Job types used to classify work. Eg Web, Print etc.
Job Task User Category List	Tasks can be assigned a status used to assist in tracking internal workflow
Source of Business List	Contacts includes the ability to track the source of your business
Sales Stage List	User defined sales stages
Credit Terms List	You credit terms
CRM Client Classification List	Contact includes the ability to segment your client list
Calendar Block Employee	When booking time in calendars you can specify the categories for bookings. Please note that if users create calendar bookings in other packages they will be entered with

	the default booking type. As such you should consider making something relatively generic “Meeting” for example the default. If your default is “Dentist” this may give some odd results!
Contact Type List	Contact notes can be classified for ease of reference – meeting, phone call
Employee Group List	You can assign staff to teams for example client teams, pitch teams
Documents Storage Type List	Documents are can be classified when saved. This list sets the available options

Charge Bands

Charge Bands holds details of the cost, markup and sale price of the goods and services you provide to your clients.



There are three types of charge rates held

- Time / Fee
  - These record the hourly rates you charge for your people
- 3rd Party
  - These record the margins you charge on purchases you make on behalf of your clients
- Expenses
  - These record the margins or prices you charge on expenses at to your clients.

Time / Fee

To add a new Charge Band to Time/ Fee click the “+” at the bottom of the grid. A new row will be added and simply type in the detail you require.

Code	The code is the charge code that users will see when selecting charge bands
Descriptor	An optional description of the charge code.
Cost	The hourly cost of providing the service. This cost is used when quoting to calculate cost / profit. At the quoting stage people have not been assigned to the job, so Traffic must use an assumed rate for providing the service.
Rate	The selling price of this service
External Code	Traffic links to other systems. This optional field allows you to record the code that the other system will recognise the activity by. If you are exporting to an accounting package you would enter the nominal code here.

Third Party / Expenses

To add a new Charge Band to Third Party / Expenses click the "+" at the bottom of the grid and enter the new information.

Code	The code is the charge code that users will see when selecting charge bands
Descriptor	An optional description of the charge code.
Cost	The cost of the item – this is optional – please see below
Markup%	The mark up of the item. This is either entered here, or automatically calculated by the system if cost and rate are populated
Rate	The selling price of the item – this is optional – please see below
External Code	As Above

Third Party and Expenses are flexible and can be used in two ways

Markup Only - in this case you leave the cost and rate blank.

For example you may mark up print at 25%.

Catalogue Item – if you sometimes sell fixed price items you can specify here the cost, mark up and rate of the item and this will be populated automatically when used in a quote or job.

For example you may sell hosting that costs you £1 per month for £100, in which case enter 1 as the cost and 100 as the rate. Other example of fixed price items might be colour print outs, CD Roms, standard stationary packs and similar.

Tip : Most agencies leave money on the table either by not marking up purchases, using a low markup or not on billing expenses at all. The amounts involved are significant to most businesses and if you do not markup / on-bill you should re-consider.

Client Rate Cards

Traffic LIVE supports custom rates cards.

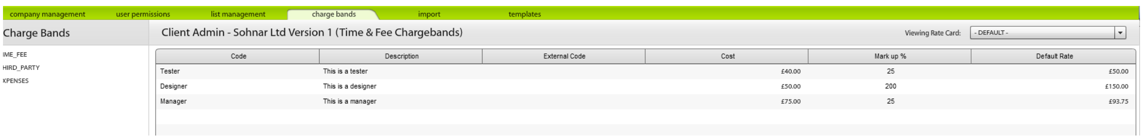
Rate cards carry custom rates for time / fees, 3rd party and expenses.

There is no limit to the number of rate cards you can have.

Rate cards are set against the client and are used automatically for all quotes / jobs for that client unless over ridden.

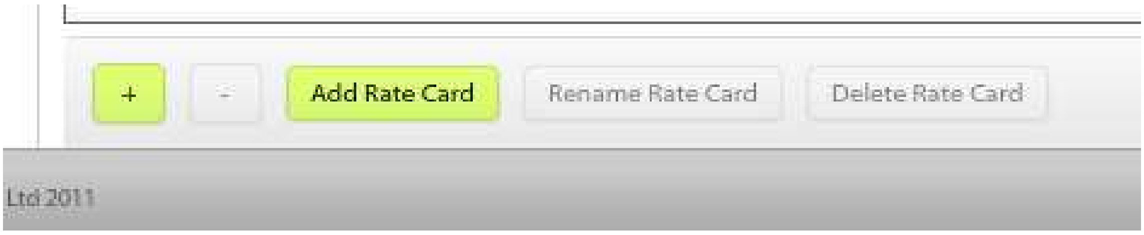
Setting Custom Rates

Enter Admin / Chargebands. Your view will look similar to below.

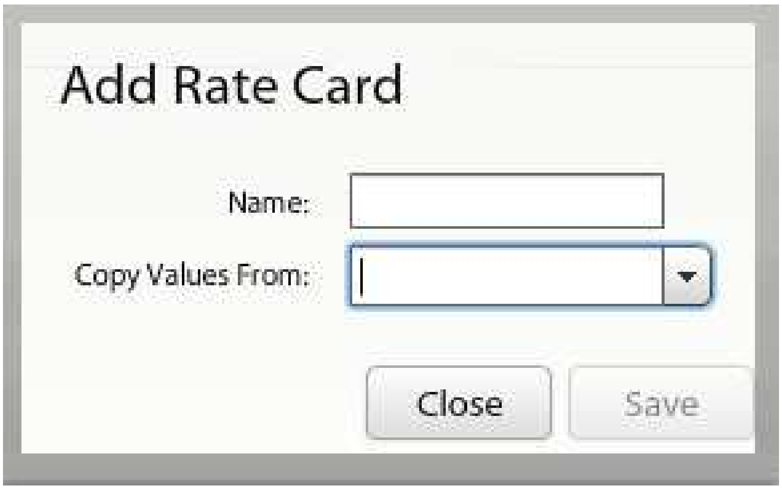


If custom rates have already been set in the system then you can view these rate cards by selecting them from the drop down at the top right of the view.

At the bottom of the view select Add Rate Card

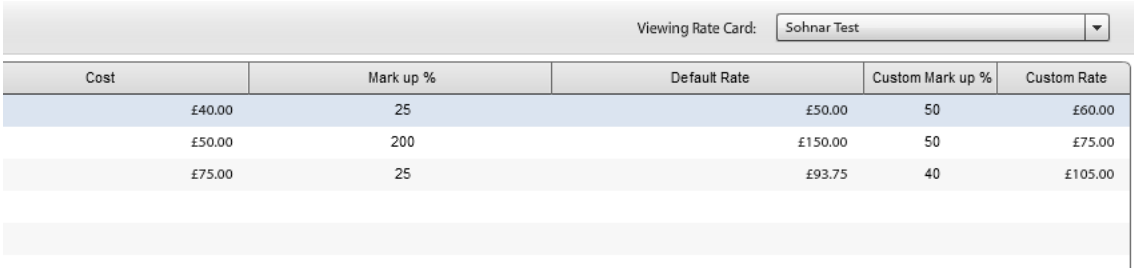


You will see the Add Rate Card dialogue



Give the rate card a name. If you already have custom rate cards you can select to copy the values to this rate card. For example if you have VODAFONE rates you might want to copy them to a new cards called VODAFONE 1.

Click Save and your rate card will be created.



Cost	Mark up %	Default Rate	Custom Mark up %	Custom Rate
£40.00	25	£50.00	50	£60.00
£50.00	200	£150.00	50	£75.00
£75.00	25	£93.75	40	£105.00

You can now enter your custom rates for the client.

If the rate for a given activity is the same as your default rate then simply leave the box blank and the default rate will be used.

Finally, remember that you can set custom rates for all three charge band categories.

Click SAVE to save your changes.

Tip: If you can in your dealings with clients try not to agree a custom rate for everything. Agree one of two rates for activities which they do all the time and keep the rest at rack. Traffic LIVE does not mind, it is just simpler on the overall administration.

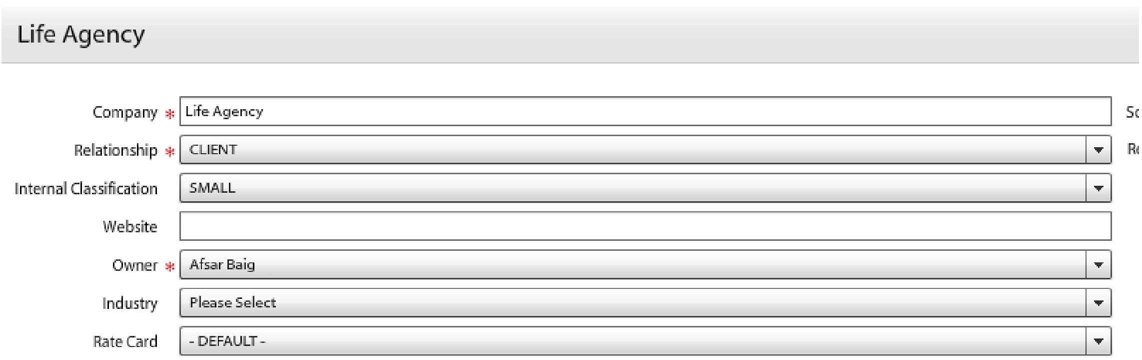
Setting a custom rate card to a client

Once you have created a custom ratecard, you should apply the ratecard to the relevant client(s).

To apply a rate card

1. Select the Client in the Contacts Section, and click EDIT.

2. Select the custom rate card from the rate card drop down and click SAVE



This rate will now be used on all subsequent quotes and jobs for that client.

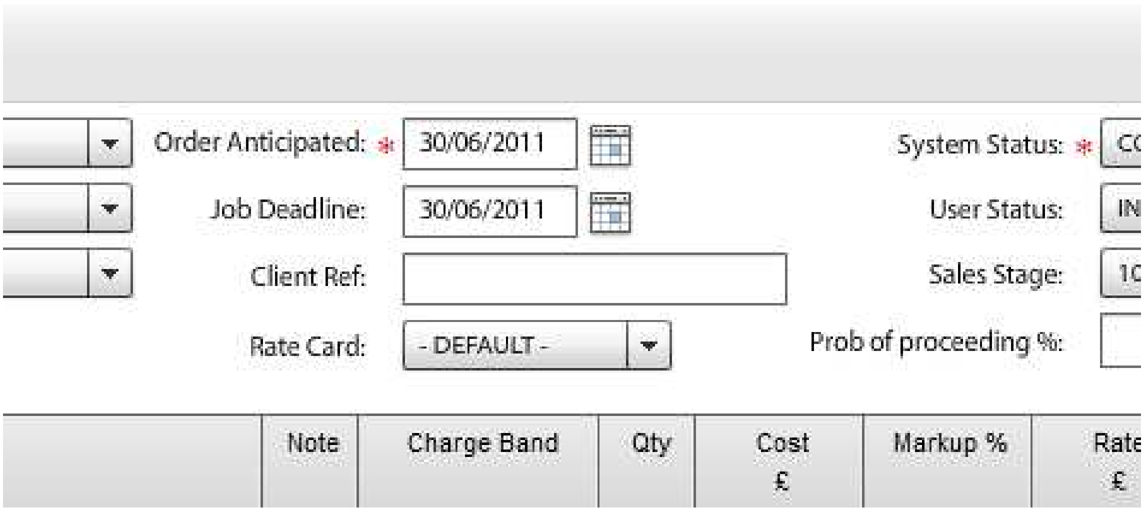
Setting / Over-riding a rate card in a Quote / Job

When you create a quote or job the rate card used will be the default rate card, or if set for the client the client rate card – set as above.

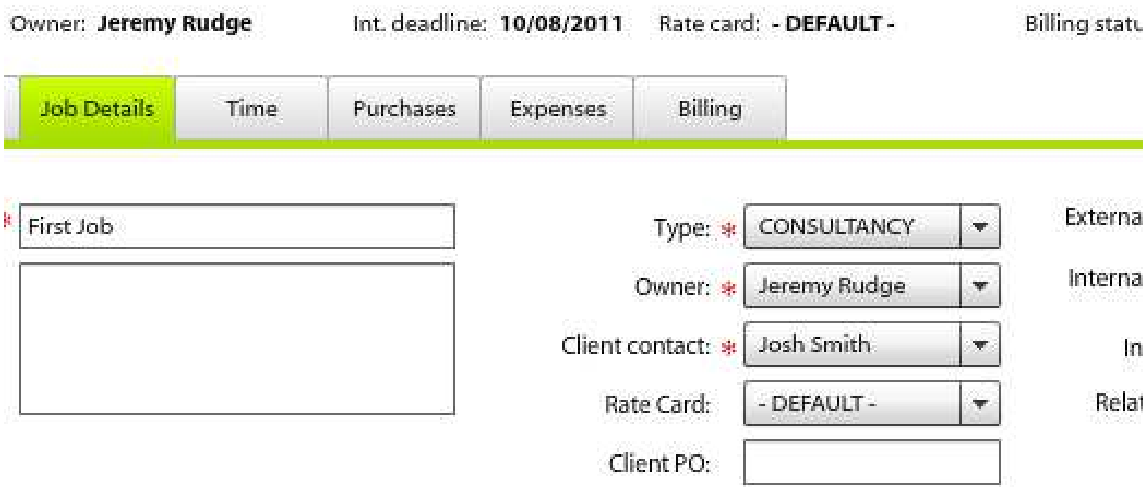
If you wish you can override this rate card and use another.

If for example you have put a client on a rate card DISCOUNT 10, but you had a special offer this month of half price design for example you would set this card up and then override this rate to SPECIAL JULY 11

On a Quote simply select a new rate card



On a Job the rate card is displayed at the top of the screen and set from within the Job Details tab



In both cases the actions following a change of rate card are identical.

1. You will be presented with a dialogue asking to you confirm the changes.

Once you confirm the rates they will be applied.

IMPORTANT NOTE: FOR THIRD PARTY COSTS AND EXPENSES THIS WILL RESULT IN THE DEFAULT RATE / COST FROM THE RATE CARD BEING SET. ANY VALUES ENTERED ON THESE LINES WILL BE **OVERWRITTEN** BY THE DEFAULT DATA IN THE CHOSEN RATE CARD

For this reason we recommend you ensure you are using the correct rate card before you start creating you quote

Import of Data

IMPORTANT NOTE. IF YOU IMPORT DATA THAT SUBSEQUENTLY PROVES TO BE INCORRECT **THERE IS NO UNDO FUNCTION**. DEPENDING ON THE VOLUME OF INCORRECT DATA IMPORTED THIS MAY TAKE MANY HOURS WORK TO DELETE. PLEASE ENSURE YOU UNDERSTAND HOW THIS FUNCTION WORKS, AND CONDUCT TEST IMPORTS TO CHECK YOU ARE GETTING THE RESULTS YOU EXPECT.

You can import data into Traffic LIVE to assist with the rapid setup of the system and to avoid rekeying.

We have sought to make the data import as simple as possible, and incorporated validation and error checking, together with reports to help you clean your data, however … the import of large volumes of information will take some planning. The information is "hierarchical" meaning that things link to other things – Companies have addresses, have employees; Projects have Jobs, have Stages have tasks and so on.

If you are importing data from a legacy system please engage the person in your business best able to understand both the data and how to manipulate it. The data will need some element of human review, and hence this person will need timely support from others in the business. It is important to be realistic as to how much time preparing the data for import may take. Very few businesses have clean unduplicated data, and cleaning data takes time also.

We can give little in the way of real guidance as to the effort required as it depends on data volume, its current structure and how clean the data is. The payoff for the investment is that good quality data makes using the system simpler for everyone.

You can also import further data at any time, but we do ask you heed to warning at the top of this page. **If an import were to be a disaster on an empty system we would probably recommend simply giving you a new one. This is not an option on a live system.**

You can import

- Staff Members
- Companies (Clients / Suppliers / Other)
- The Addresses linked to these companies
- The People who work for these companies
- The Project structure you have in place for your clients
- The Job structure beneath this project structure, together with "meta" information about that job, who owns it and so on.
- Job Stages, and job tasks within those stages *
- Job Purchase data *
- Job Expense Data *
- Client Correspondence

* these imports relate to the estimated time / purchase / expenses against a job. We do not currently import actual values.

Automated Creation of Imports from Sohnar and other systems

If you are an existing client of Sohnar using our Filemaker system we can prepare these imports for you from your current system. This process is part automated / part manual and we will get the files back to you just as soon as we can.

We are also able to offer this service from select other systems in the market place. If you have a system that we do not support, please send us a copy of it and we will see what we can do for you.

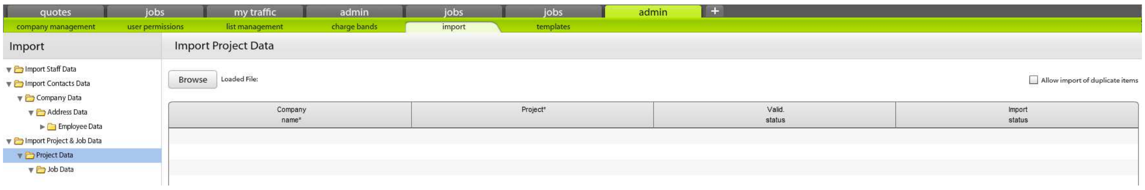
We will send you a copy of the import files for checking. We will show you how to import files, however it is essential that any errors reported are corrected as you go, and in the main this requires client knowledge to undertake. If errors are not corrected they will most likely multiply as you progress. For example a job without an account manager might lead to hundreds of tasks to be rejected in subsequent imports.

Data is a complex thing and if you have used fields to record other information etc. or we have made a mistake, it is easier to deal with this before import rather than after.

If it also possible that your data may require some cleaning before it can be imported. We will let you know if this is the case, but for example mandatory fields will need to be completed and if there is any data that carries, for example, a duplicate company name this will need to be dealt with before importing commences.

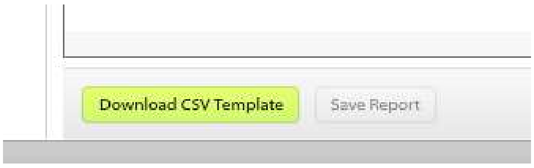
Importing Data

In the Admin tab select Import.



From the left hand tree select what it is that you would like to import.

And from the bottom of the page click to download the CSV template corresponding to the import.



This will give you the template for the items you are seeking to import, along with a small amount of example data.

IMPORTANT NOTE : A CSV file has no formatting, and the program that opens it determines if the field is a text field or a number field. We have no control over this and applications vary as to how they do this.

It is important that anything that could have a leading zero – a telephone number for example is converted to a text field. We have tested this on a variety of spreadsheet type programs. Excel tends to create number fields and Open Office text fields but please check. Programs and their default settings will vary. Likewise fields containing a ":" could be converted to a time field.

Importing Staff Members

Staff members are the members of your Team that will have a login to Traffic LIVE.

1. Download the template and complete it

2. "Browse" select the file and click OK / OPEN depending on your operating system

3. The data will now be loaded into the view. AT THIS POINT THE DATA HAS NOT BEEN IMPORTED

4. You will see a "Valid Status" column on the right hand side.

   This column tells you if Traffic LIVE is able to accept the data provided – ie it meets the validation rules.

   An item can either PASS or FAIL. If an item fails then there will be a number after it letting you know how many things it has failed on, eg FAIL (1)

   If you have any failures then click on the "SAVE REPORT" button and Traffic LIVE will produce you a report telling you why the data failed

5. next you MUST scan the data manually to confirm that what is being processed is as you expect.

6. There are two options at the top of the screen

a. Create User Account on Import

   The creation of a user and the creation of an account for that user (ie emailing them and giving them a login) are separate processes. Checking this box will give all your users an account, accompanied by a welcome email. Not checking this box will allow you do this manually later.

b. Give Full Permissions on Import

   By default users are created with a limited permission set. Checking this option gives users all privileges, with the exception of changing the permissions of others and creating new users.

7. Once you are happy, click SAVE

8. Each item in turn will then be processed. Once commenced this process cannot be stopped. Each line will show if it was successfully imported or not.

   An item that met the validation rules can still fail import as more detailed checks are performed once the line is submitted for processing

9. At the end of this process, click “SAVE REPORT” for a record of what you imported and also details of any entries that failed.

Tip: The information contained in the import must “Text Match” those held in Traffic LIVE fields that relate your data to other parts of the system.

For example the Department must exist in Traffic LIVE and the spelling for the department in Traffic LIVE and the import must be identical.

FOR MATCHING PURPOSES FIELDS ARE NOT CASE SENSITIVE

First Name *	Staff members first name
Last Name	Staff members last name
Job Title	Job Title
Location*	This location MUST text match the a company location in Traffic LIVE
Department *	This Department MUST text match the

	a company department in Traffic LIVE
Email *	A valid email address is required. Traffic LIVE does not allow staff email addresses to be duplicated and duplicates will be rejected.
Telephone / Mobile	Self Explanatory. Ensure that leading zeros are present
External User Code	If you are linking Traffic LIVE to another system, this is the ID that the other system knows the staff member by
Cost Per Hour	What does this person cost?
Daily Hours Log	How many hours is this person expected to log each day

* = Mandatory

Importing Contacts Data

Contacts comprise three levels, the Company Data, the Address data and finally the employee data.

The process is almost identical to that detailed for Staff Members above other than Step number 6 – the check boxes at the top of the screen.

Checking the check box allows you to import duplicate entries. Duplicate entries are those that “Text Match” entries already in the Traffic LIVE database.

The date imported is hierarchical, that is to say that the Address data references the Company data and the Employee Data references the Address Data.

As such when importing you must import Company data first, Address data next and finally Employee data.

As with Staff Data Traffic LIVE uses “text matching” when importing, and to work the fields that refer to other fields must match exactly, so when the Address data is referencing the Company Name the name must match that in Traffic LIVE.

Important Note: Traffic LIVE is a job management system, it was designed to hold all of your clients, suppliers and current prospects. We are aware than some of our clients have databases containing 10,000 / 20,000 / 30,000 prospects from bought in lists. Traffic LIVE was not designed as a prospecting tool on this scale and prospects on this scale should not be imported.

The system has no practical limit to the number of real clients and suppliers you can have (well into the thousands) however loading the system with thousands of speculative records for which you are not proposing to issue quotes any time soon will only serve to slow the

system down. We do not stop you doing this, however please bear in mind that if you do it, your system will slow down and the only way to remove them is manually.

Type*	client / supplier / other
Company Name*	Company Name!
Relationship *	client / ex_client / prospect / supplier / ex_supplier
Website	Website
Owner *	The name of the person at your agency who owns this relationship. This must text match the name of a staff member in Traffic LIVE
Relationship Since	DD/MM/YYYY (this is the format regardless of the date format set in Traffic LIVE
Turnover	Turnover
Employees	Number of Employees
Tax Number	VAT number or similar
External Company Code	If you link Traffic LIVE to other systems, this is the code that the other system refers to the company as

Marketing / Email / Telephone Opt Out	yes / no
Notes	Max 8192 characters

Address Data

Company Name*	This must exactly match the name of a company in Traffic LIVE
Company Type	client / supplier / other (bear in mind you may have clients in more than one category
Address Name *	The address by which the address is known – London, Head Office
Address 1/2/3/City / Postcode	As described
Country*	Must match the country codes in Traffic LIVE
Phone / Fax / email / website	As label
Location Notes	Max 8192 characters. Do NOT use commas as they will be interpreted by the system as moving to the next field on import.

Employee Data

Company Name *	This must exactly match the name of a company in Traffic LIVE
Company Type	client / supplier / other (bear in mind you may have clients in more than one category
Address *	The Address Name as imported on previous spreadsheet
Remaining fields are self explanatory	

Importing Project, Job, Stage, Task, Purchase and Expense data

The instructions for importing Projects and Jobs are identical to the Import Contacts Data section above.

As with the previous sections Traffic LIVE uses “text matching” when importing so for example the Project Name referred to in a job must be identical to the Project Name stored in Traffic LIVE.

You should import Projects first, followed by Jobs, followed by Stages, followed by tasks, purchases and expenses.

Tip : If you are importing information from another system the job number in that system will be retained if the job number is set on import.

The import tool was designed to assist you in rapidly getting your current project / job structure into the system when you first start using the system. We would recommend against filling the system with non current jobs as other than acknowledging that the job existed in the past you will have no work flow information etc. to view. Legacy data is usually best left in the system that created it.

Project

Company Name	This must exactly match the name of a company in Traffic LIVE
Project	The name of the project you wish to create

Job

Company Name*	This must exactly match the name of a company in Traffic LIVE
Project Name*	The name of the project you wish import the job to
Job Name*	The name of the job you wish to create
Job Number	If your legacy data caries a job number then entering it here will force this job number on Traffic LIVE so that your old numbering system will carry through into Traffic LIVE. Note: New jobs will follow Traffic LIVEs sequential numbering model.
Description	Description
Job Type*	Job Type – must match a valid job type in Traffic LIVE. Job types are set in admin / list management
Client Contact *	The person at the client company who has instructed you regarding this job

Rate Card	The rate card for the job
Client PO	Client PO
Client PO Value	Client PO Value
External Job Code	If Traffic LIVE is being connected to other systems, the code by which the job is known
External Deadline Date	dd/mm/yyyy
External Deadline Time	
Internal Deadline Date	dd/mm/yyyy
Internal Deadline Time	
In House Job	yes / no
Job State*	Progress / Draft / Complete / Declined
Job Billing State*	Part_Billed / Billing_complete / not_billed
Brief	The brief text field. Max 8192 characters

Stage (Optional)

Stage data is optional in Traffic LIVE, however if your task data references stages these stages must be present or the tasks will reject.

Title	The Name of the stage
Job ID	The job number that this Stage is a member of. This must include the prefix and number – eg J102
Note	The stage notes. Max 8192 characters
Order in Hierarchy	This reflects the order in which the stages are displayed. Whole numbers starting with 1. If left blank the stage order will be random.

Task

Note : Task import imports the ESTIMATED numbers for the task. As such you can set up jobs etc so the system is “ready to go” but you cannot import actual values.

Job ID	The job number that this Task is a member of. This must include the prefix and number – eg J102
Stage Name	The name of the Stage that the task is a member of. This uses text matching and must match exactly.

Description	Task description
Note	Task notes. Max 8192 characters
Chargeband	The chargeband for the task. This uses text matching and must exactly match a chargeband in Traffic LIVE
Hours	The estimated number of hours in the task. Decimal.
Cost	The cost per hour of the task
Total	The total SELLING price of the task
Studio Hours	The hours allocated to the studio. Decimal
Order in Hierarchy	This reflects the order in which the tasks are displayed. Whole numbers starting with 1. If left blank the stage order will be random.
Category	Tasks can either be FEE TIME or MILESTONE
User Defined Category	Tasks carry a user defined category. This uses text matching and must exactly match a user task category in Traffic LIVE

Is Complete	yes / no
Start Date	The task start date dd/mm/yyyy
Deadline Date	The task deadline date dd/mm/yyyy

Purchase

Note : Purchase import imports the ESTIMATED numbers for the task. As such you can set up jobs etc so the system is “ready to go” but you cannot import actual values.

Job ID	The job number that this Purchase is a member of. This must include the prefix and number – eg J102
Description	Purchase description
Note	Purchase notes. Max 8192 characters
Chargeband	The chargeband for the purchase. This uses text matching and must exactly match a chargeband in Traffic LIVE
Quantity	The quantity
Cost	The cost price per item in decimal
Total	The estimated total purchase price

Expense

Note : Expense import imports the ESTIMATED numbers for the task. As such you can set up jobs etc so the system is “ready to go” but you cannot import actual values.

Job ID	The job number that this Expense is a member of. This must include the prefix and number – eg J102
Description	Description
Note	Expense notes. Max 8192 characters
Chargeband	The chargeband for the expense. This uses text matching and must exactly match a chargeband in Traffic LIVE
Quantity	The quantity
Cost	The cost
Total	The estimated total expenses

Importing Quote Data

The instructions for importing Quotes are identical to the Import Jobs section above.

As with the previous sections Traffic LIVE uses “text matching” when importing so for example the Project Name referred to in a job must be identical to the Project Name stored in Traffic LIVE.

You should import Projects first, followed by Quotes, followed by Stages (optional) , followed by quote items.

Tip : If you are importing information from another system the quote number in that system will be retained if the job number is set on import.

The import tool was designed to assist you in rapidly getting your current project / job structure into the system when you first start using the system. We would recommend you are selective as to the volume of historic quote information you import. If it is valuable, bring it in, but just make sure you don’t end up cluttering a new system with volumes of information that serves little or no purpose.

Quote Data

Company Name*	This must exactly match the name of a company in Traffic LIVE
Project Name*	The name of the project you wish import the job to
Quote Name*	The name of the quote you wish to create
Quote Number	If your legacy data caries a Quote number then entering it here will force this job number on Traffic LIVE so that your old numbering system will carry through into Traffic LIVE. Note: New jobs will follow Traffic LIVEs sequential numbering model. If left blank then a sequential quote number will be allocated on import.
Date Created (optional)	dd/mm/yyy
Brief	Imports the quote brief. Max 8192 characters
Description	Quotes Description
Job Type*	Job Type – must match a valid job

	type in Traffic LIVE. Job types are set in admin / list management. Job Type is a shared term between Quotes and Jobs used to classify work .
Owner*	Your member of staff who is responsible for the Quote
Client Contact *	The person at the client company who has instructed you regarding this job
Order Anticipated*	The date you believe the order will be won. dd/mm/yyyy
Job Deadline	Anticipated job deadline dd/mm/yyyy
Client Ref	Client Reference
Rate Card	The rate card for the quote
System Status	Progress / Draft / Complete / Declined
User Status	A valid user status as defined in admin / list management
Sales Stage	A valid Sales Stage as defined in admin / list management
Prop Of Proceeding	Number (0-100)

Quote Stage Data (Optional)

Stage data is optional in Traffic LIVE, however if your quote line item data references stages these stages must be present or the items will reject.

Title	The Name of the stage
Quote ID	The Quote number that this Stage is a member of. This must include the prefix and number – eg J102
Order in Hierarchy	This reflects the order in which the stages are displayed. Whole numbers starting with 1. If left blank the stage order will be random.

Quote Item Data

Quote ID	The quote number that this Item is a member of. This must include the prefix and number – eg J102
Stage Name	The name of the Stage that the item is a member of. This uses text matching and must match exactly. Expenses and Third Party items cannot be a member of a stage. Seeking to import them will cause an error
Type	The line can be either TIME / FEE / THIRD_PARTY or EXPENSES
Description	Item description
Note	Task notes. Max 8192 characters
Chargeband	The chargeband for the task. This uses text matching and must exactly match a chargeband in Traffic LIVE
Qty	Quantity
Cost	The cost per unit of the item
Markup	Markup %

Rate	Rate inc Markup
Total	The total SELLING price of the item
Studio Hours	The hours allocated to the studio. Decimal
Hierarchy Order	This reflects the order in which the items are displayed. Whole numbers starting with 1. If left blank the stage order will be random.
Exclude from Invoice (Screen should read Exclude from Quote)	Allows items to be excluded from the printed view. Yes / no

Correspondence

Created By	The member of staff who created the correspondence. This field uses text matching and the name must match exactly a user in Traffic LIVE
Contact With	Either a name or an email address. Multiple entries are separated with a comma - fred smith,joe blogs If you use a name then the name must exist in the Company (specified below) and be an exact match. Email addresses do not need to exist in Traffic LIVE
Copied To	The e-mail address the correspondence was copied to. Multiple cc's are separated by a comma Jeremy@sohnar.com , tom@sohnar.com Email addresses do not need to exist in Traffic LIVE
Subject	The Subject
Details	The body text

Type	Traffic LIVE allows you to specify your own “type” for a contact. Call, Email etc. This field must text match the type in Traffic LIVE
Created Date	Created date dd/mm/yyyy
Client Contact	
Company Name	A valid company name in Traffic LIVE. This uses text matching and must match exactly. The company is further identified by the type – below.
Company Type	Client / Supplier / Other
Job Name	If a Job name is specified it must text match a valid job name in Traffic LIVE. If job name is used then Project Name is mandatory
Job Number	Job Number in Traffic LIVE
Project Name	A valid project name in Traffic LIVE for the client specified. This field is mandatory if Job Name is used

Templates

Traffic LIVE is supplied with standard outputs for Invoice, PO and Quote.

These are to a generic design that will allow you to get the most from the system "out of the box". With a basic knowledge of CSS and HTML you can customise these outputs to look as you choose. Please see "Creating Custom Outputs" below.

Traffic LIVE also allows you to modify the standard set up to a point to ensure it is fit for purpose.

You can

- Specify the image to be used on the document
- Change the documents header
- Change the document footer
- Change the background colour on the table grid
- Specify you own document annex – your terms of sale / purchase for example

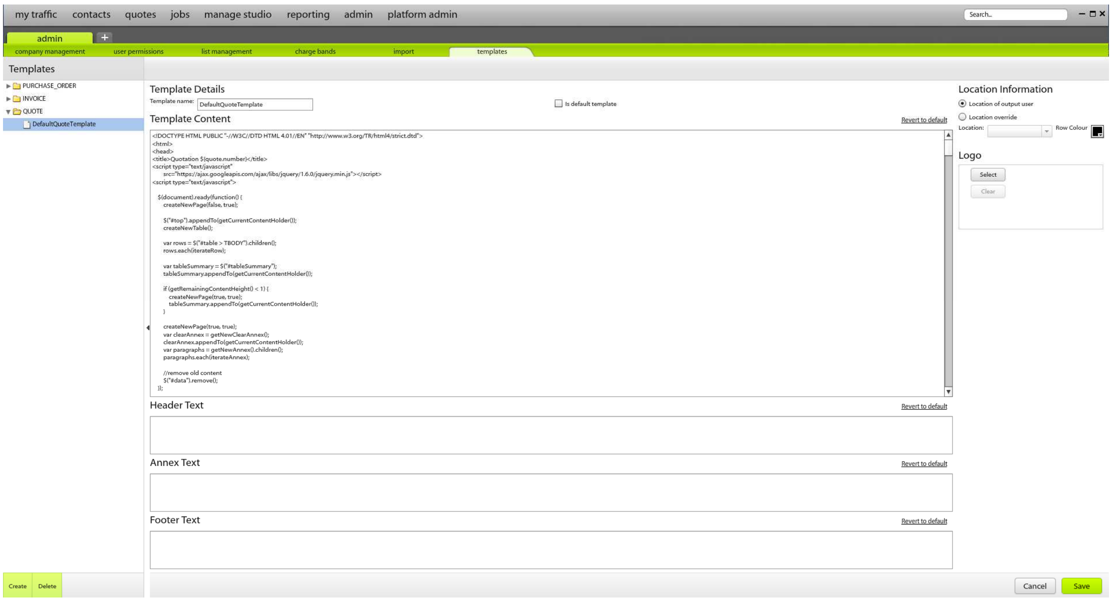
If you would like more changes than this then a bit of HTML coding is required.

Making Changes

In Admin select the Templates Tab.

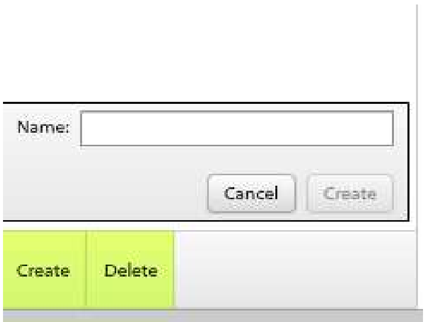
The templates available are listed down the left of the screen, whilst the content of each is different the way in which they work is identical.

- Click on a template to select it. Your view will look similar to below.



Type into the boxes on the left, your preferred header, footer and annex text. Click SAVE.

You can create multiple templates for each type of output, so if you need invoices with different remittance advices or POs with different terms for different type of goods then you can create multiple templates.



The create additional templates Click Create at the bottom of the page and give the template a new name. If you wish this template to be the default, then check the box at the top of the screen.

These boxes will accept plain text or HTML. For a simple footer where you are happy with the font in our template, simply type. For something more complex or for example a formatted annex requiring paragraphs etc you must use HTML.

Tip : You can save word documents as HTML and then use this HTML to “paste” into your Annex. You will need to check that the output is as you expect.

On the right hand side you can make selection as to how the template operates.

Location

Traffic is multi locational, so you can have a team in London and a team in Manchester.

The system holds address details for each of your locations.

The template maybe configured either to give the address to which the user belongs, or to always default to a fixed address.

TIP: You might want quotes to go from the location of the user, but invoices to always come from “head office” for example

Images

You can add you own image / logo to the layout. Each layout (quote, invoice, PO) can carry a different image.

As in the example above the size of the image need not be “suitable” for the layout. The image will be scaled when used and retain its aspect ratio.

Row Colour

The top of the tables can have a coloured background if you wish. Use the colour picker to set your chosen colour.

The Quotation

The quotation produced will look similar to that below. Our templates are subject to revision so yours may look a little different.

Quotation

Q6

Sohnar Ltd Version 1
1 Glenthorne Mews
Hammersmith
London
W6 0LJ

Life Agency
1 Grren Space
Nice Town
Birmingham

BL12 A56

Date: 26/06/2011
Account manager: Jeremy Rudge
Quotation for: Brochure

#	Description	Quantity	Rate	Total £
0	Graphical Design internalNote:4aa2-940	18.00	100.00	1800.00
1	Document Layout internalNote:4f6c-b92	24.00	100.00	2400.00
2	Transportation internalNote:8d97f3f6	5.00	1500.00	7500.00
3	Printing of Brochures internalNote:ab89264a	1.00	750.00	750.00
4	Copywriting internalNote:2598a7fa	8.00	100.00	800.00

Creating Custom Outputs

PLEASE NOTE : Creating custom outputs assumes a knowledge of CSS and HTML and potentially JavaScript proportionate to what you are seeking to achieve. If you create custom outputs that do not work and need our guidance to "fix" them we will charge for this service. Please bear in mind we will need to look at what you have done, understand it and then debug it. If unsure we provide an optional layout building service.

PLEASE NOTE : Traffic LIVE will either create your output in HTML and then allow the user to print to PDF, or print to a PDF directly. Printing via HTML allows you to use any font installed on your machine. If you choose to print to PDF this is rendered on our servers and you are restricted to the 100 or so fonts that we support.

Traffic LIVE allows you to produce quotations, purchase orders and invoices that match you own style.

The Templates section of Admin holds the templates for these documents.

The templates contain a mixture of JavaScript which controls things like page breaks when the documents is printed, and HTML which controls the look and feel of the output.

There is a forum on support.sohnar.com that carries additional fields, new output templates, and also lets you share your creations with others.

Tip: If you edit the Javascript please ensure your knowledge of Javascript is sufficient for what you are seeking to achieve.

Tip: If you make changes to your templates we recommend you keep a copy somewhere. If another user with admin privileges were to come and "play" with the template there is no way of undoing their changes. The only option is to revert it to the standard Traffic LIVE settings.

The Structure of the Templates

All templates have an identical structure as follows

Document Section	Description
CSS	The top of the document is a CSS Style sheet
Top Section	The top section of the document, typically containing the addresses, details of the job and so on
Table section	Contains the line items of the quote / invoice / PO
Table Summary	Contains totals
Page Header	The top of the second and subsequent pages
Page Footer	The bottom of all pages
Annex	The final page of the documents – use for Terms and Conditions and similar

HTML

Each section is clearly marked on the default HTML template eg

****
Top Section
****

The layout contains standard HTML. This user guide does not cover the use of HTML, and our support team are unable to give any guidance on this area.

The coding used to pull through the values from the system is detailed below They are designed to be self explanatory and unless required we do not provide a further description.

We can access pretty much any property in the system and make it available to you. The list runs to many thousands and hence we have only documented the key fields below. If you wish to include something not listed please email priority@sohnar.com with precise details of what you are seeking to achieve and we will tell you the syntax to display the relevant fields.

For simplicity the codes are presented in the same sections as used in our standard outputs, but with the exception of the table construct which must be used within a table context anything can be used anywhere.

Looking at the code will give you a better idea, and to assist you we have left small code snippets in the detail below.

The variables are shown for Quote, PO and Invoice. Many variables will repeat as they are used in each layout but are kept together for ease of reference.

Quotation

TOPSECTION

${quote.number}

${recipient.contactPerson.personalDetails.fullName

${recipient.name}

${recipient.address.lineOne}

#if("$!recipient.address.lineTwo"!="")

${recipient.address.lineTwo}

#if("$!recipient.address.lineThree"!="")

${recipient.address.lineThree}

${recipient.address.city}

${recipient.address.postCode}

${quote.date}

${quote.ownerName}

${company.trafficCompanyName}

${company.senderAddress.lineOne}

${company.senderAddress.lineTwo}

${company.senderAddress.lineThree}

${company.senderAddress.city}

${company.senderAddress.postCode}

${quote.name}

PAGEHEADERSECTION

${company.headerText}

PAGEFOOTERSECTION

${company.footerText}

ANNEXSECTION

${company.annexText}

TABLESECTION

${quote.currencySymbol}

#foreach($itemin${quote.items})

${item.lineItemOrder}

#if("$!{item.description}

${item.description}

#end

#if("$!{item.internalNote}"!="")

${item.quantity}

${item.rate.amountString}

${item.total.amountString}

TABLESUMMARYSECTION

${quote.currencySymbol}${quote.total.amountString}

Purchase Order

TOPSECTION

${po.poNumber}

${company.trafficCompanyName}

${company.senderAddress.lineOne}

${company.senderAddress.lineTwo}

${company.senderAddress.lineThree}

${company.senderAddress.city}

${company.senderAddress.postCode}

${recipient.name}

${recipient.address.lineOne}

${recipient.address.lineTwo}

${recipient.address.lineThree}

${recipient.address.city}

${recipient.address.postCode}

${po.supplierReference}

${po.jobNumber}

${po.userName}

${po.orderDueDate}

PAGEHEADERSECTION

${company.headerText}

PAGEFOOTERSECTION

${company.footerText}

ANNEXSECTION

${company.annexText}

TABLESECTION

(${po.currencySymbol})

${po.item.description}
${po.item.supplierOrderLineItem.orderedQuantity}
${po.item.supplierOrderLineItem.orderedUnitCost.amountString}
${po.item.supplierOrderLineItem.orderedTotalCost.amountString}

Invoice

TOPSECTION

${company.trafficCompanyName}
${company.senderAddress.lineOne}
${company.senderAddress.lineTwo}
${company.senderAddress.lineThree}
${company.senderAddress.city}
${company.senderAddress.postCode}
${recipient.name}
${recipient.address.lineOne}
${recipient.address.lineTwo}
${recipient.address.lineThree}
${recipient.address.city}
${recipient.address.postCode}

${invoice.jobDetail.name}

${invoice.date}

${invoice.jobNumber}

${invoice.ownerName}

${recipient.creditTermsType}

PAGEHEADERSECTION

${company.headerText}

PAGEFOOTERSECTION

${company.footerText}

ANNEXSECTION

${company.annexText}

TABLESECTION (Including code)

```
(${invoice.currencySymbol})</th>
#foreach($itemin${invoice.items})
<tr>
<td>
#if("$!{item.description}"!="")
<pclass="description">
${item.description}
#end
#if("$!{item.internalNote}"!="")
<pclass="note">
$item.internalNote.replaceAll("","<br/>").replaceAll("</?[^>]+[^(br/)]>","")
#end
</td>
<tdclass="money">${item.net}</td>
<tdclass="money">${item.vat}</td>
#if($!{invoice.dualTax})
<tdclass="money">${item.vat2}</td>
#end
<tdclass="money">${item.gross}</td>
</tr>
#end
```

TABLESUMMARYSECTION

```
${invoice.netTotal}
${vat.percentage}
${invoice.currencySymbol}
${vat.amount}
${invoice.grossTotal}
```

Images

You can add images hosted elsewhere if you prefer. To use the image for the layout (per the selections on the template – ie specific to the) use the following

<img src="data:image/png;base64,${company.logo}"

We can build you layouts for you. The current charge for this is £595 per set with 2 amends. (Correct @ July 2011). You will need to supply the HTML components for us to work with.

Page Breaks

The templates handle page breaks to ensure that breaks are logical and clean. As the "table section" crosses page boundaries the table header is replicated at the top of each page.

The table will always page break at the end of a line item – ie it will not print half of a line & description on one page and half on another.

This approach works well in almost all circumstances, but you should be aware that if you have very long notes to each line item then if the next item will not fit on the page a break will be forced. This could give rise to a strange looking output. These circumstances are relatively unlikely to happen in practice.

Important Note : If you amend the page dimensions in the CSS style sheet this will most likely break the auto page break function. The JavaScript in the header carries page dimensions as well and is responsible for the

page breaking. Our recommendation would be not to touch – but it depends on how good your JavaScript is!

Custom Fonts

The templates are rendered in your browser, and then either saved and sent to the client as HTML or printed to PDF as you choose (see below). Alternatively we will create the PDF directly for you on our servers.

Producing documents via HTML on your machine allows you to use any font installed on the machine. If we produce the PDF for you, you are restricted to the fonts installed on our servers. If your document uses and undefined font in most cases the font will revert to Courier.

Tip: If you are using a non standard font, please be aware that if you send the client the HTML it will be rendered into a different font and will not look as intended.

Supported Fonts

aakar	mikachan
Aksharyogini	mikachan\-PB
Andale Mono	mikachan\-P
Ani	mikachan\-PS
AnjaliOldLipi	Mitra Mono
Arial	Mona
Arial Black	Mukti Narrow
Arian AMU	Nakula
Arimo	Norasi
AR PL KaitiM Big5	ori1Uni
AR PL KaitiM GB	padmaa\-Bold.1.1
AR PL Mingti2L Big5	padmaa
AR PL SungtiL GB	Pothana2000
AR PL UKai CN	Purisa
AR PL UKai HK	Rachana
AR PL UKai TW	RaghuMalayalam
AR PL UKai TW MBE	Rekha
AR PL UMing CN	Saab
AR PL UMing HK	Sahadeva
AR PL UMing TW	Samanata
AR PL UMing TW MBE	Samyak Devanagari
Arundina Sans	Samyak Gujarati
Arundina Sans Mono	Samyak Oriya
Arundina Serif	Sarai
BPG Classic	Sawasdee
BPG Classic Medium	Sazanami Gothic
BPG Classic School	Sazanami Mincho
BPG SanSer	suruma
Chandas	Tibetan Machine Uni
Comic Sans MS	Times New Roman
Courier New	Tinos
Cousine	TlwgMono
Dyuthi	TlwgTypewriter
gargi	Tlwg Typist
Garuda	Tlwg Typo
Georgia	Trebuchet MS
Impact	Umpush
Jamrul	UnBatang
Jomolhari	UnBom
Kalimati	UnDotum
Kalyani	UnGraphic
Kedage	UnGungseo
Kinnari	UnJamoBatang
Kochi Gothic	UnJamoDotum
Kochi Mincho	UnJamoNovel
Likhan	UnJamoSora
Lohit Bengali	UnPen
Lohit Gujarati	UnPenheulim
Lohit Hindi	UnPilgi
Lohit Kannada	UnShinmun
Lohit Oriya	UnTaza
Lohit Punjabi	UnYetgul
Lohit Tamil	Vemana2000
Lohit Telugu	Verdana
Loma	Waree
Mallige	Webdings
Meera	WenQuanYi Zen Hei

Printing to PDF

Once the quote etc. is displayed in your browser you can print to PDF. On a MAC this is a built in function. On a PC there are a wide variety of "PDF Printers" available free of charge.

We use http://www.dopdf.com/ , but a search of Google for "pdf printer driver" will show many more options.

If you have installed Adobe Creative Suite then the Adobe PDF printer will most likely be installed already.

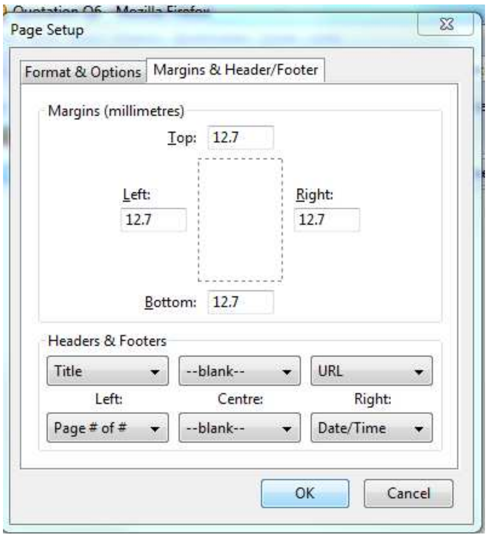
Turning off Browser Generated Headers and Footers & Printing Colours

Depending on your browser settings, when you print you may find that things such as the URL of the page you are looking at, the date and time etc. maybe added to the PDF.

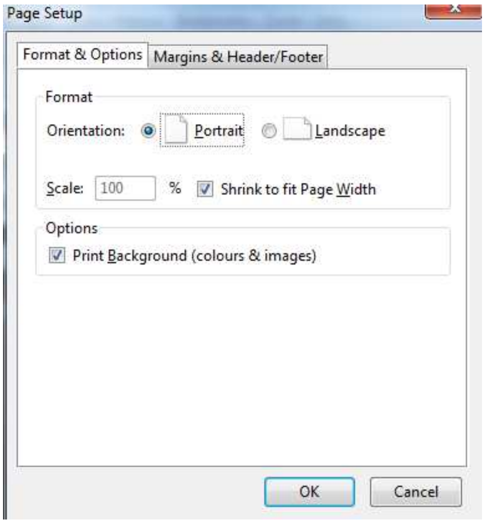
Additionally if your design includes coloured fonts or fill colours (table headers for example) you will need to enable "Print Background Colours and Images" or the browser will default to black fonts.

These settings can simply be changed

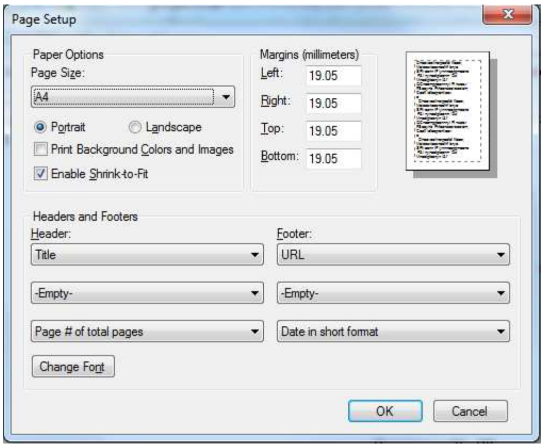
- Firefox
    - File / Page Setup
    - Select Margins / Headers and Footers
    - Change all 6 options to "blank"



- Select Format and options
- Check the Check the box “Print Background (colours and images)



- Explorer
  - Click the expanding panel to the right of the printer icon
  - Select “Page Setup”
  - Change all options to “Empty”
  - Check the box “Print Background Colours and Images



You can also edit page alignment here if you wish to use more of the margin, however please be aware that if changes are made here that are then not reflected in the Style Sheet of the template the pagination of the document my not be correct.

Open API

Traffic LIVE has a comprehensive Open API allowing you to integrate Traffic LIVE into your other business systems.

The user guide covers some high level details of this API. Additional documentation will be placed on the Traffic LIVE website shortly and should be considered the authoritative source of information

The Traffic LIVE API is licensed to you for use within your company. If you want to use the Traffic LIVE APIs outside the scope of these Terms and Conditions, or to build and/or distribute enterprise applications outside your own company (e.g. use the APIs to build an Application that you distribute to other companies), please contact us at support@sohnar.com . We will consider your request and put in place the required commercial agreements.

We apply certain terms and conditions to your access of our systems that can be found below. These are little more than common sense and indeed common courtesy, but we do ask you read and understand them before using our API.

Connecting to the Traffic LIVE API requires a level of technical skill relative to the outcomes you are seeking to achieve. Traffic LIVE holds critical business data and developers are advised to ensure they have the required level of skills and understanding to ensure they do not unintentionally corrupt or change this data so as to cause a business impact. We operate regular backups, however these are for our own business continuity purposes and we are unable to restore damaged data on an individual client level.

Fees and Charges

API Fees : Currently access to the Traffic LIVE API is free of charge, however you may require a specific user to access the API which is billable in accordance with our tariff. We reserve the right to charge for API access in the future, to which we will provide 30 days notice.

Support Fees : The Traffic LIVE API is documented and developers should use this documentation coupled with knowledge of the system and the user guide to develop their solutions. Sohnar does not offer technical support for the API, other than the correction of errors / bugs, within its support packages which are designed to support users using Traffic LIVE through the supplied user interface.

We offer developer time at a current tariff of £150 per hour part thereof should you require assistance. This will be billed to your company at the month end.

Please ensure you have the authority to incur these charges before contacting us for technical support.

Terms

1. You must not violate any law or the rights of any individual or entity, and must not expose Traffic LIVE or Traffic LIVE users to harm or legal liability as determined by us in our sole discretion.
2. You must not include functionality that proxies, requests or collects Traffic LIVE usernames or passwords.
3. You must not circumvent (or claim to circumvent) our intended limitations on core Traffic LIVE features and functionality.
4. If you offer a service for a user that integrates user data into a physical product (such as a support ticket system), you must only create a physical product for that user's personal and non-commercial use.
5. If you wish to commercially exploit the integration you have created you must seek permission from Traffic LIVE.
6. Traffic LIVE may limit the number of network calls that your Application may make via the APIs, and/or the maximum Content that may be accessed, or anything else about the APIs and the Content it accesses as Traffic LIVE deems appropriate in its sole discretion. Traffic LIVE may change such usage limits at any time. In addition to its other rights under these Terms, Traffic LIVE may utilize technical measures to prevent over-usage and/or stop usage of the APIs by an Application after any usage limitations are exceeded. If no limits are stated in the Master Agreement, you nevertheless agree to use the APIs in a manner that, as determined by us in our sole discretion, exceeds reasonable request volume or constitutes excessive or abusive usage.

   Specifically you must not

   - poll our service for the purpose of determining uptime / availability
   - set up services relying on polling at less than 60 second intervals
   - make, or seek to make, unconstrained service calls
   - attempt any action that due it its size, nature or frequency could reasonably be expected to impact or impair the Service performance for other users
   - write routines that seek to extract substantially all of the data we hold on our system

7. You must not use or make derivative use of Traffic LIVE icons, or use terms for Traffic LIVE features and functionality, if such use could confuse users into thinking that the reference is to Traffic LIVE features or functionality.

8. You must not build any module or solution the circumvents or undermines our per user licensing model.

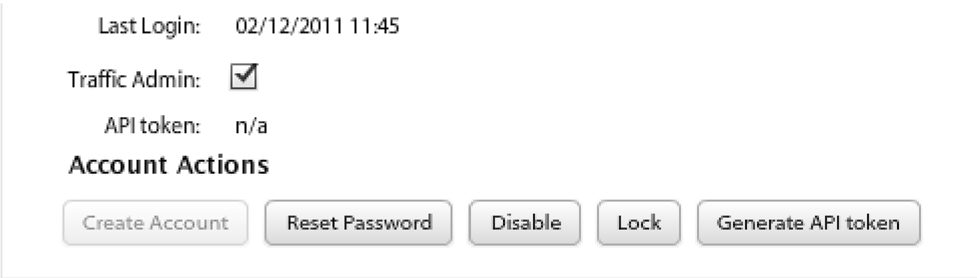
9. You must not create a link to any competing Project Management /. Job Management solution without our express consent in writing

10. You will only request the data you need to operate your application.

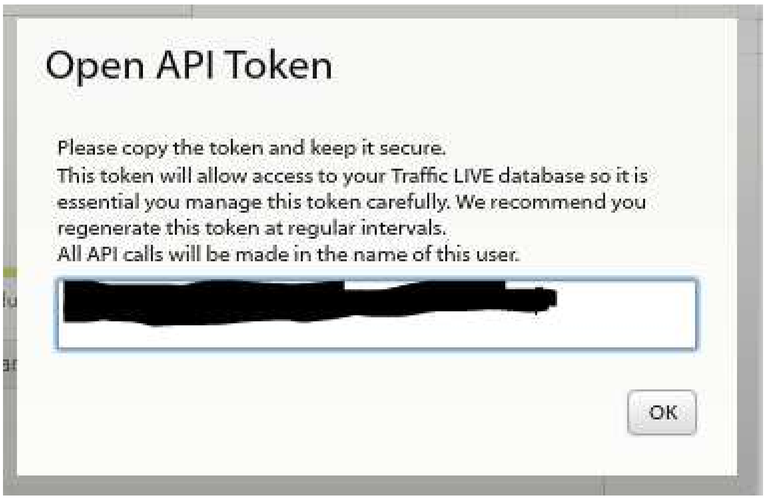
Obtaining API Tokens

In Admin / Company Management, select a staff member and in the Account Details area you will see the button to generate an API token.

For this button to be visible the user must be selected as Traffic Admin (the highest level of access in the system).



Clicking Generate API Token will result in the token being displayed.



The API token will be partially displayed

API Tokens cannot be recalled, and if they are lost then the key will need to be regenerated.

THE API KEY IN CONJUNCTION WITH THE USER NAME WILL ALLOW UNRESTRICTED ACCESS TO THE API AND ALL AVIALABLE DATA AT COMPANY LEVEL. IT IS ESSENTIAL THAT THE KEY IS TREATED WITH THE RESPECT AND SECURITY THAT IT DESERVES.

WE RECOMMEND THAT THIS KEY IS REGULARLY REGENERATED

You may obtain an API key on any users account that carries Traffic Admin privileges.

We would recommend that you set up an account for each system you are seeking to integrate to. Most screen in Traffic LIVE include details such as "Last Updated By …" and if this is using a real users identity this is likely to at best cause confusion.

An account called "Maconomy Integration", "Paprika User" or similar will give far greater traceability of how something came to change in your Traffic LIVE system.

Available Services

The web site http://trafficlive.com/api holds details of all current available service calls.

There is a developers forum on support.sohnar.com