

Time Tracking

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How to access it

From the main menu, click on the arrow next to the Docs module, choose **Time Tracking**.

The screenshot shows the App4Legal application interface. At the top, there is a dark blue navigation bar with the App4Legal logo and several menu items: Dashboards, Companies, Contacts, Matters, Tasks, Contracts, Money, Docs, and an 'Add' button with a dropdown arrow. Below the navigation bar, there is a 'Select Year' dropdown menu currently set to '2020'. The main content area features a chart titled 'Matters Per Filing Date' with a dark blue header. The chart area is mostly empty, with three small blue bars visible at the bottom. On the right side, a dropdown menu is open, showing options: Reports, Time Tracking (highlighted in blue), Intellectual Property, FAVORITES, My Expenses, and My Reminders.

Add/Edit a Time Log

There are many ways that a Time Log can be added.

• From the Quick Add

The screenshot shows the 'Quick Add' dropdown menu. It has a dark blue header with the word 'Add' and a dropdown arrow. Below the header, there is a list of items, each with an icon and a label: Company (building icon), Contact (person icon), Corporate Matter (briefcase icon), Contract (document icon), Matter Container (box icon), Litigation Case (gavel icon), Hearing (gavel icon), Intellectual Property (shield icon), Task (checklist icon), Log Time (clock icon, highlighted in blue), Expense (dollar sign icon), Meeting (group of people icon), and Reminder (bell icon).

- **Manage Timer:** Click on Start timer, relate the timer to a matter or Task . Once the Timer is stopped, the system will automatically relate the Time Log to the Task or Matter.

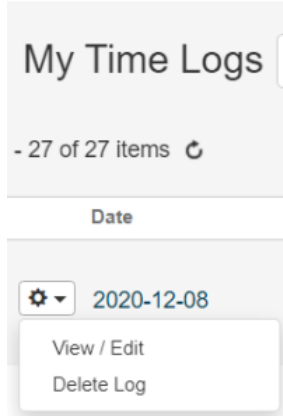


- **Time Tracking in the Money module:** In the Money module that is the work space of the Accountant, there is a possibility to Edit a Time Log. An Accountant would be mostly interested in specifying the Status for billing. This will be discussed in later bullets.

A Time Log form has important fields such as:

- User: By default it is the Logged in App4Legal User. However, the User can be changed such that a Time Log can be added on behalf of another user.
- Matter/Task: The matter and/or Task that the Time is logged on. If a matter is chosen, then the look up of Tasks will only check Tasks that are related to the matter.
- Billable/Internal: If the Time Log is Billable, then it will appear in the Invoicing module. If Billable is chosen, the system will fetch the client at the matter level. If there is no Client at the matter level, then the client inserted at the Time Log shall be injected into the matter automatically.
- Time Spent on: A defined list that is managed from the Admin & Setup or on the fly.
- Date
- Eff. Effort: Time logged in hours. If using the Manage Timer, the system will automatically calculate the Time in hours.
- Comments: Description of the Time Log.

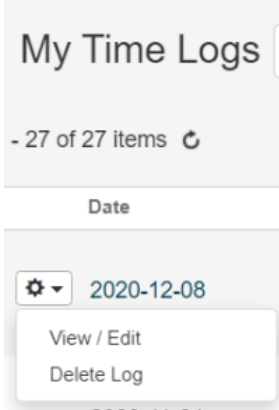
In order to edit a Time Log entry, click on the action wheel next to the Time Log on the grid and choose View/Edit.



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- Delete a Time Log**

In order to delete a Time Log entry, click on the action wheel next to the Time Log on the grid and choose Delete.



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Advanced Search

Using **Advanced Search**, you can run your search on a specific field from the Time Log form. You'll have the possibility also to modify the operator of search for each field (i.e. equal, begins with, contains, >, <, and more). the Advanced Search menu is hidden by default; you need to click on the link Advanced Search to unhide it.

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Export to Excel

The Time Tracking grid can be exported to an excel sheet at any moment via the Actions button on the grid-> Export to Excel. Also, search results can be exported to an excel sheet separately.

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