

Setting up activities

Goal: Set up activities in Ajera so you can use them in your daily work.

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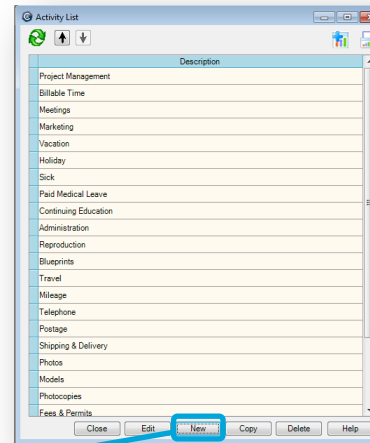
An activity is the type of work or expense charged to a project. You use activities throughout Ajera to track, bill, and report your labor, reimbursable, and consultant costs.

Specifically, you use activities to:

- Identify the type of work or expense charged to a project.
- Establish billing rates.
- Capture detail for project reporting, employee utilization, and client invoicing.

Step 1: Set up an activity for labor

1. Click **Setup > Activities**.
2. Click the **New** button.
3. Enter information to define the labor activity you are setting up.



When you add a new activity, Ajera automatically assigns a status of Active.

If you changed the status to Inactive, the activity would not be available to select when you enter new time. However, the activity would still be available for invoicing and reporting existing information. You can change the status at any time.

Enter a name for the activity. It appears on lists in Ajera, such as when entering time. It can also appear on project reports and client invoices.

Select Labor since you are setting up an activity for labor.

The screenshot shows the 'New Activity' dialog box. The 'Status' dropdown is set to 'Active'. The 'General' tab is selected. The 'Description' field contains 'Professional Education'. The 'Activity type' dropdown is set to 'Labor'. The 'Nonbillable utilization type' dropdown is set to 'Continuing Education'. There are three checkboxes: 'Apply sales tax' (checked), 'Allow entry on expense reports' (unchecked), and 'Unit based' (unchecked). The 'Unit description' field is empty. The 'Unit cost rate' and 'Unit billing rate' fields both contain '0.0000'. At the bottom, there are buttons for Close, Save, Cancel, and Help.

Step 1: Set up an activity for labor (continued)

4. Select a nonbillable utilization type, if applicable.

The screenshot shows two overlapping windows. The 'New Activity' window has a 'Status' dropdown set to 'Active'. It has tabs for 'General', 'Cost/Expense Accounts', 'Attachments', and 'Notes'. The 'General' tab is active, showing 'Description' as 'Professional Education', 'Activity type' as 'Labor', and 'Nonbillable utilization type' as 'Continuing Education'. There are checkboxes for 'Apply sales tax' and 'Allow entry on expense reports'. The 'Utilization Type List' window is open over the 'New Activity' window, showing a list of utilization types: Marketing, Meetings, Vacation, Holiday, Sick, and Continuing Education. The 'Continuing Education' type is selected and highlighted in blue.

The Nonbillable utilization type affects how time is reported on the Employee Utilization report.

If you wanted to report direct project time as billable on the Employee Utilization report, you would leave this field blank. (Billable time is time that appears on client invoices.)

In this example, you want to report the time as nonbillable so select a nonbillable utilization type.

Indirect time is broken down into these default utilization types: Marketing, Meetings, Vacation, Holiday, Sick, Continuing Education, Admin, and Other.

Note that you cannot add or delete utilization types, but you can change the default descriptions for them.

After you set up your labor activities and employees start entering time, you can track staff productivity using the Employee Utilization report (Reports > Employee > Employee Utilization).

This report shows the way time was spent by your employees for various categories of non-project time and for billable time. Employee utilization is a widely accepted industry standard to help track and manage employee time.

Step 1: Set up an activity for labor (continued)

5. Select to apply sales tax, as needed.

If you selected to apply sales tax on the [Company > Preferences > Billing](#) tab, then this check box is available here.

You would select it if sales tax should be applied to billing amounts for this activity during the client invoicing process. Ajera calculates sales tax for this activity only if the project is set up for sales tax and a tax rate is defined.

The screenshot shows the 'New Activity' dialog box with the 'General' tab selected. The 'Status' is set to 'Active'. The 'Description' is 'Professional Education' and the 'Activity type' is 'Labor'. The 'Apply sales tax' checkbox is checked. Other options include 'Allow entry on expense reports' and 'Unit based', both unchecked. The 'Unit cost rate' and 'Unit billing rate' are both set to 0.0000.

6. Click the **Cost/Expense Accounts** tab.

The fields on the **Cost/Expense Accounts** tab are available only for Expense and Consultant activities.

For Labor activities, Ajera automatically distributes the costs to expense accounts you selected in [Company > Preferences](#).

The screenshot shows the 'New Activity' dialog box with the 'Cost/Expense Accounts' tab selected. Fields include 'Billable', 'Nonbillable', 'Marketing', and 'Overhead expense', each with a dropdown menu. The 'In-house Credit' section has an 'Account' dropdown. The 'Department' is set to 'Architectural'.

7. Click **Save**.

Ajera adds the new activity to the bottom of the list of activities.

Click and drag it to where you want it.

The screenshot shows the 'Activity List' window with a list of activities. The activities listed are: Paid Medical Leave, Continuing Education, Administration, Reproduction, Blueprints, Travel, Mileage, Telephone, Postage, Shipping & Delivery, Photos, Models, Photocopies, Fees & Permits, Personal Expense, Electrical Consultant, Structural Consultant, Other Consultant, Mechanical Consultant, and Professional Education. 'Professional Education' is highlighted at the bottom of the list.

Step 2: Set up an activity for expenses

1. Click **Setup > Activities**.
2. Click the **New** button.
3. Enter information to define the expense activity you are setting up.

Enter a name for the activity.

As mentioned earlier, it appears on lists in Ajera, such as when entering time.

It can also appear on project reports and client invoices.

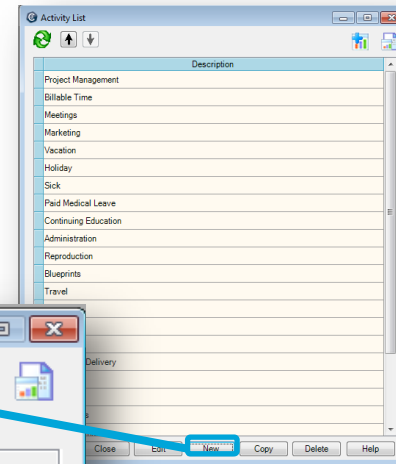
If you wanted to make this activity available for use on employee expense reports, you would select this check box.

Enter a name for the unit in singular form, such as Mile or Copy.

Ajera automatically makes it plural on reports and invoices, as needed.

Enter the unit cost rate and unit billing rate.

If you later decide to use a different billing rate for a specific project, you can create a rate table with the unique rates or change the billing rate on the client invoice. To learn more, see the [Setting up billing rates quick lesson](#).



Select Expense since you are setting up an activity for expenses.

To base the cost or billing for this activity on units, select the Unit based check box.

Mileage is a good example of a unit-based activity because you want to enter the number of miles and have Ajera automatically calculate the cost and billing amounts.

Step 2: Set up an activity for expenses (continued)

4. Click the **Cost/Expense Accounts** tab.

Specify the default expense accounts to charge when you enter expenses. For project-related expenses, the billing type of the project or phase determines the expense account.

For example, expenses charged to a billable phase for this activity affects account 5220.

Activity - Mileage

Status: Active

General Cost/Expense Accounts Attachments Notes

Billable: 5220 Billable Travel

Nonbillable: 6220 Nonbillable Travel

Marketing: 8690 Marketing Travel

Overhead expense: 8460 Mileage

In-house Credit

Account: []

Department: Admin

Save Cancel Help

For aJeraComplete or the Departments add-on only.
Only applies if you are using departments.

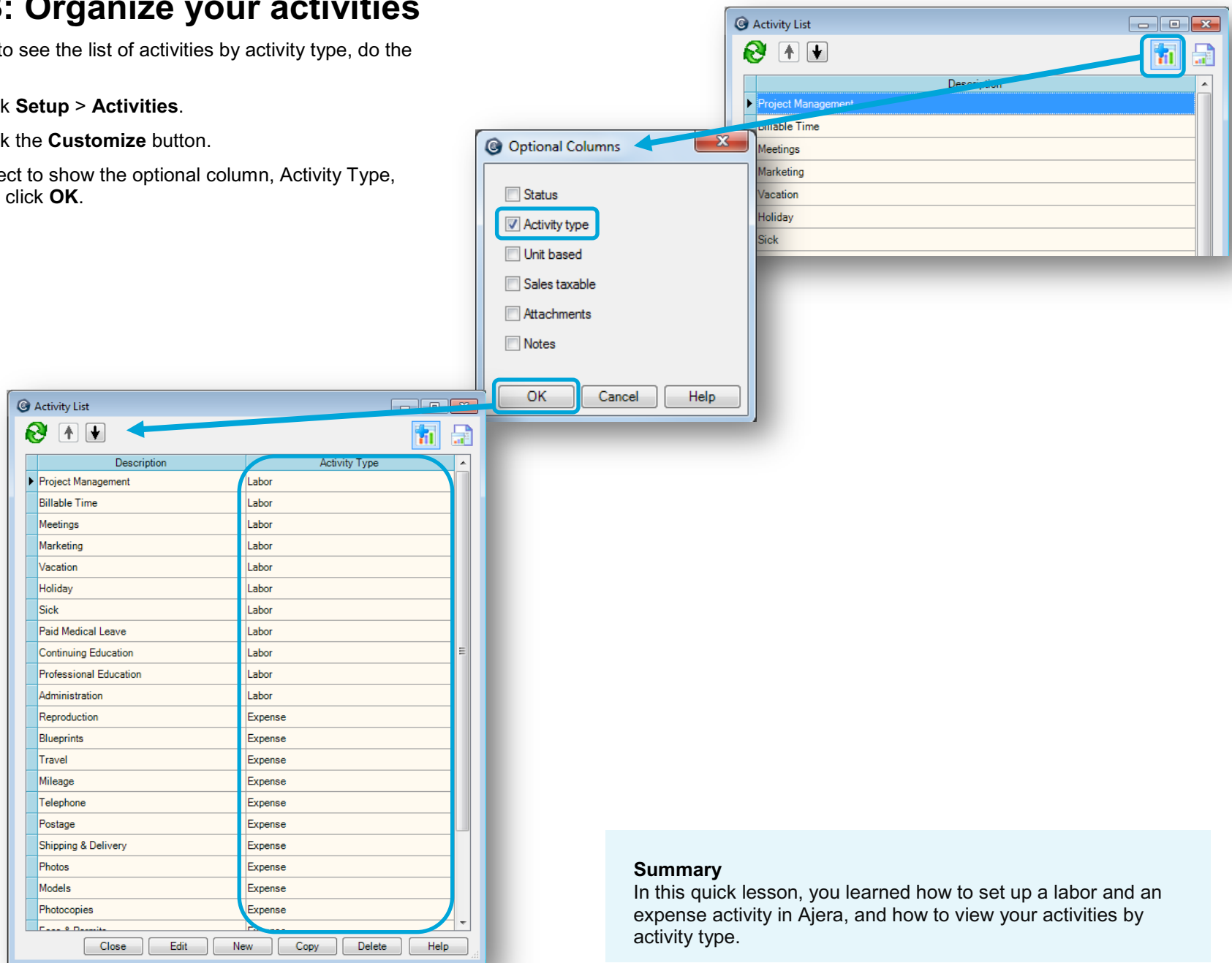
Select the department you want to use for the credit entry when the amount associated with this activity is moved from an overhead expense to a project cost.

5. Be sure to save the new activity. As with the labor activity you created earlier in this quick lesson, move this new activity from the bottom of the list of activities, as needed.

Step 3: Organize your activities

If you want to see the list of activities by activity type, do the following:

1. Click **Setup > Activities**.
2. Click the **Customize** button.
3. Select to show the optional column, Activity Type, and click **OK**.



The screenshot shows the 'Activity List' window with the 'Optional Columns' dialog box open. The 'Optional Columns' dialog box has the following options:

- Status
- Activity type
- Unit based
- Sales taxable
- Attachments
- Notes

The 'OK' button is highlighted. The 'Activity List' window shows a table with the following columns: Description and Activity Type.

Description	Activity Type
Project Management	Labor
Billable Time	Labor
Meetings	Labor
Marketing	Labor
Vacation	Labor
Holiday	Labor
Sick	Labor
Paid Medical Leave	Labor
Continuing Education	Labor
Professional Education	Labor
Administration	Labor
Reproduction	Expense
Blueprints	Expense
Travel	Expense
Mileage	Expense
Telephone	Expense
Postage	Expense
Shipping & Delivery	Expense
Photos	Expense
Models	Expense
Photocopies	Expense

Summary

In this quick lesson, you learned how to set up a labor and an expense activity in Ajera, and how to view your activities by activity type.