Setting up activities

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

In this quick lesson

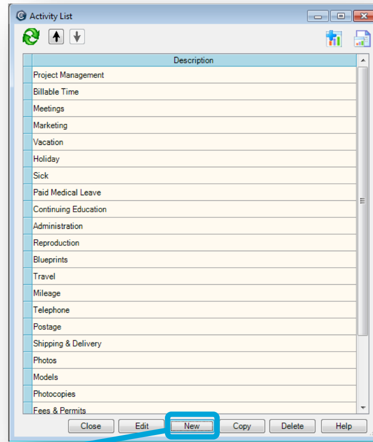
An activity is the type of work or expense charged to a project. You use activities throughout Ajera to track, bill, and report your labor, reimbursable, and consultant costs.

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.



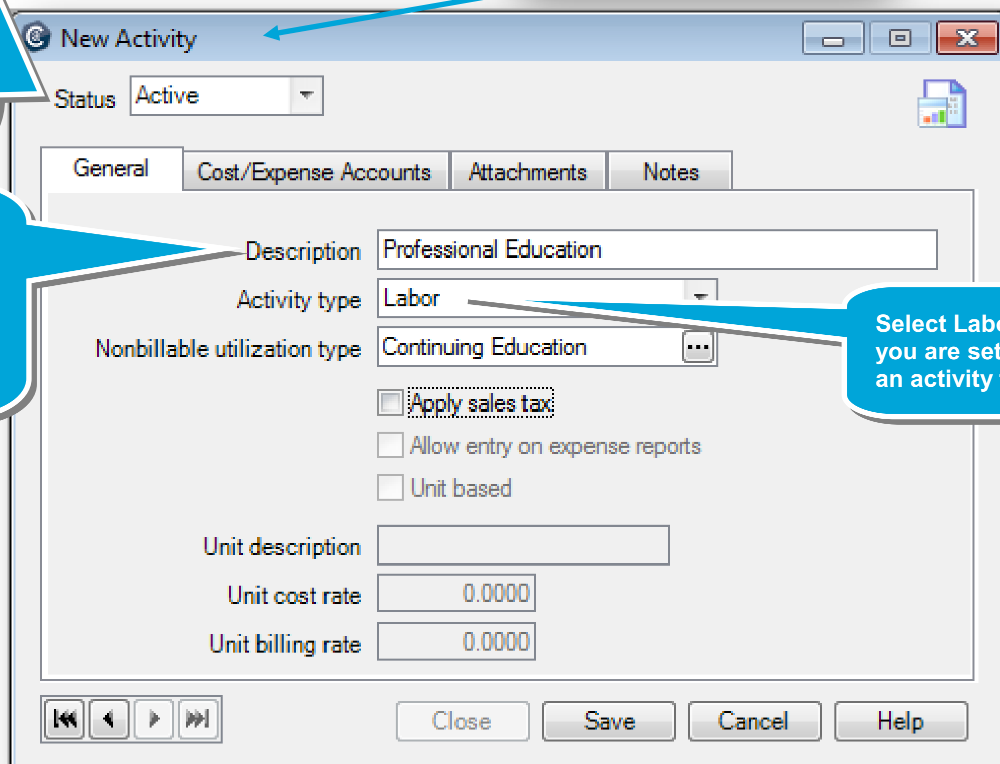
When you add a new activity, Ajera automatically assigns a status of Active.

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.

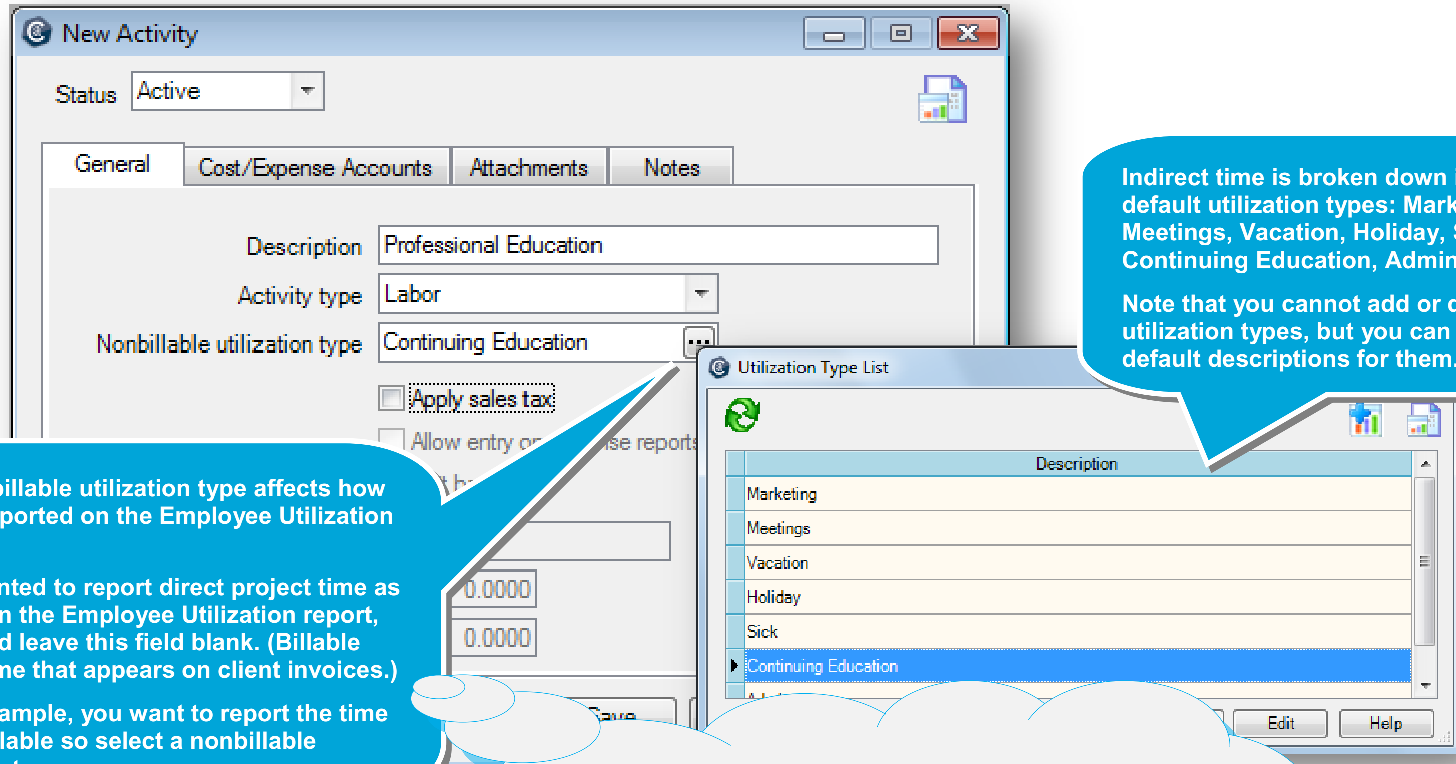
It can also appear on project reports and client invoices.



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

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

4. Select a nonbillable utilization type, if applicable.



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.

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.

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).

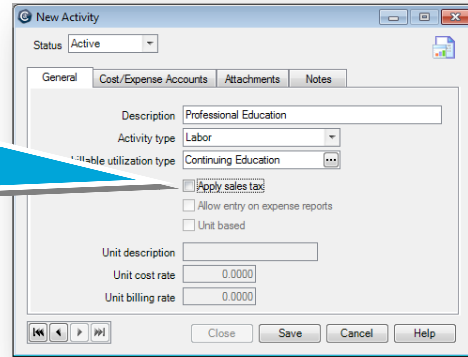
This report shows the way time was spent by your employees for various categories of non-project time and for billable time. Employee utilization is a widely accepted industry standard to help track and manage employee time.

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.

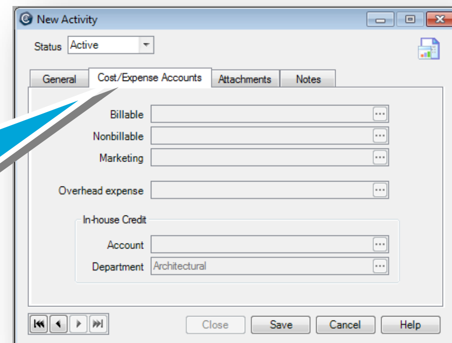


---

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.

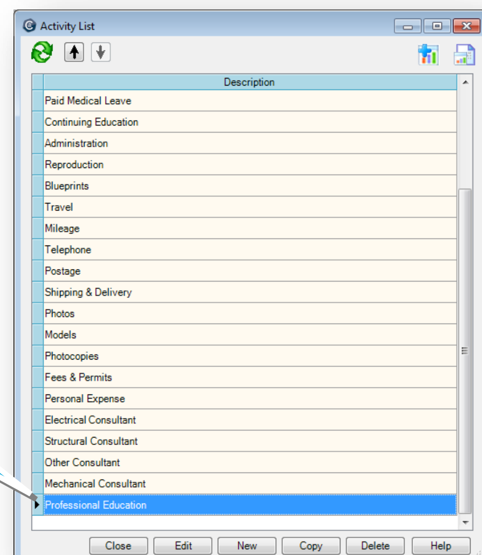


---

7. Click **Save**.

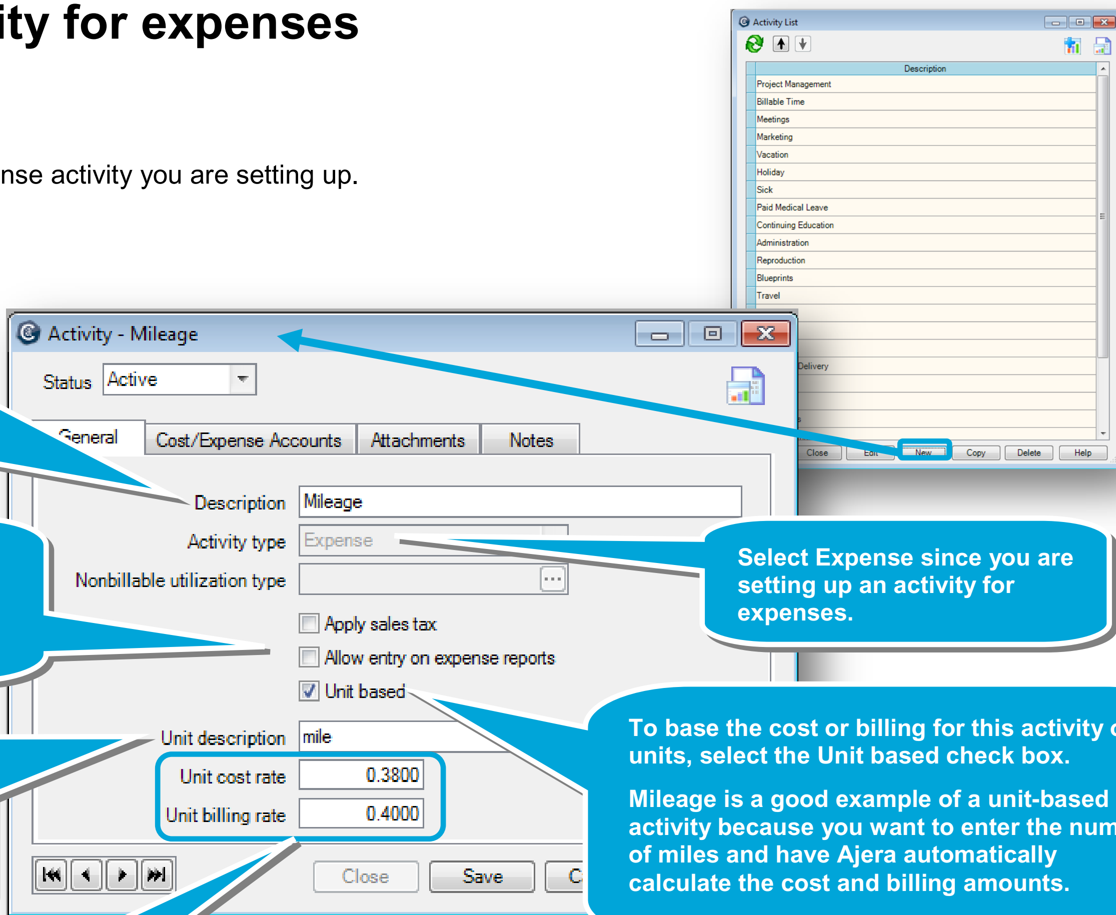
Ajera adds the new activity to the bottom of the list of activities.

Click and drag it to where you want it.



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.

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.

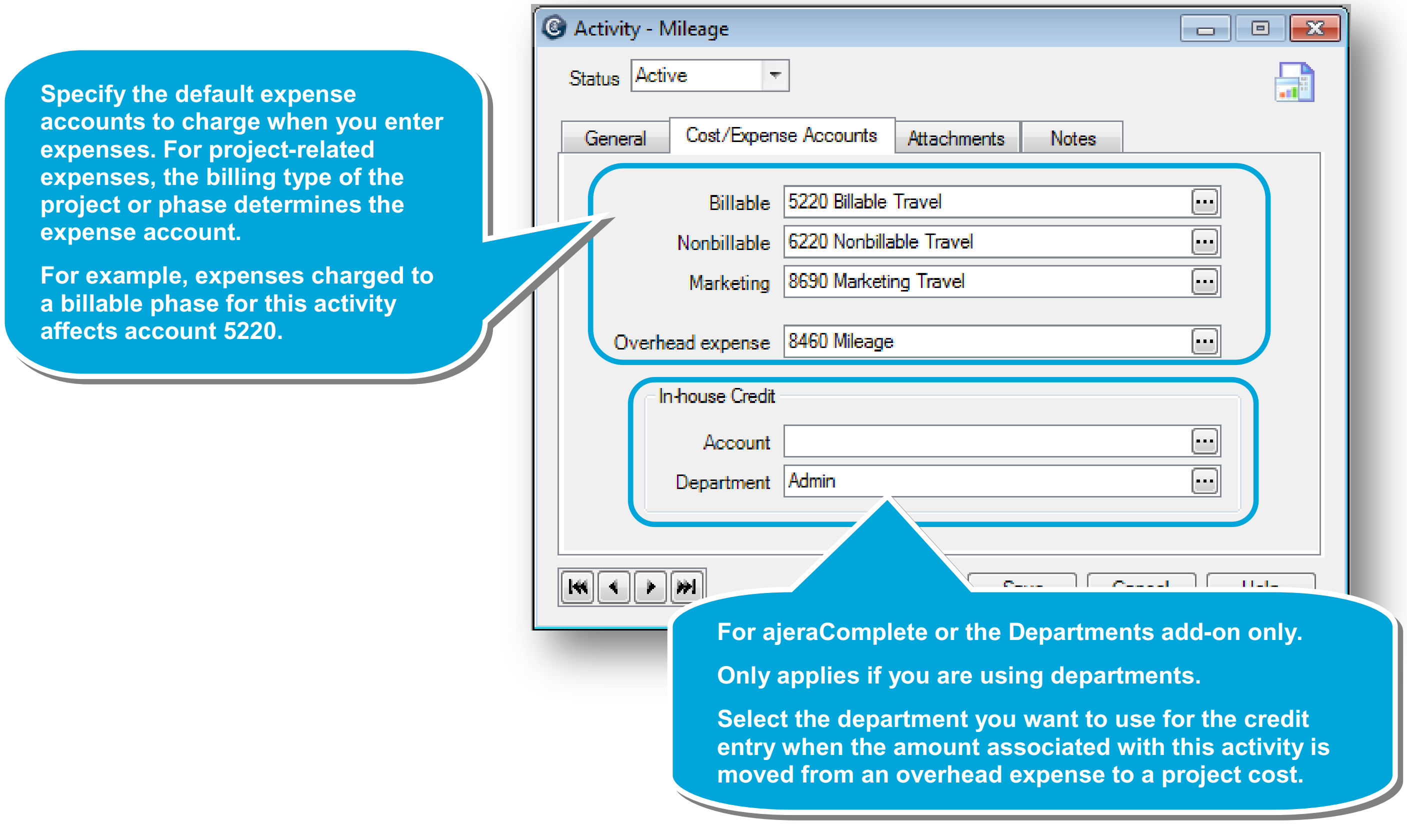
Mileage is a good example of a unit-based activity because you want to enter the number of miles and have Ajera automatically calculate the cost and billing amounts.

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.*

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

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

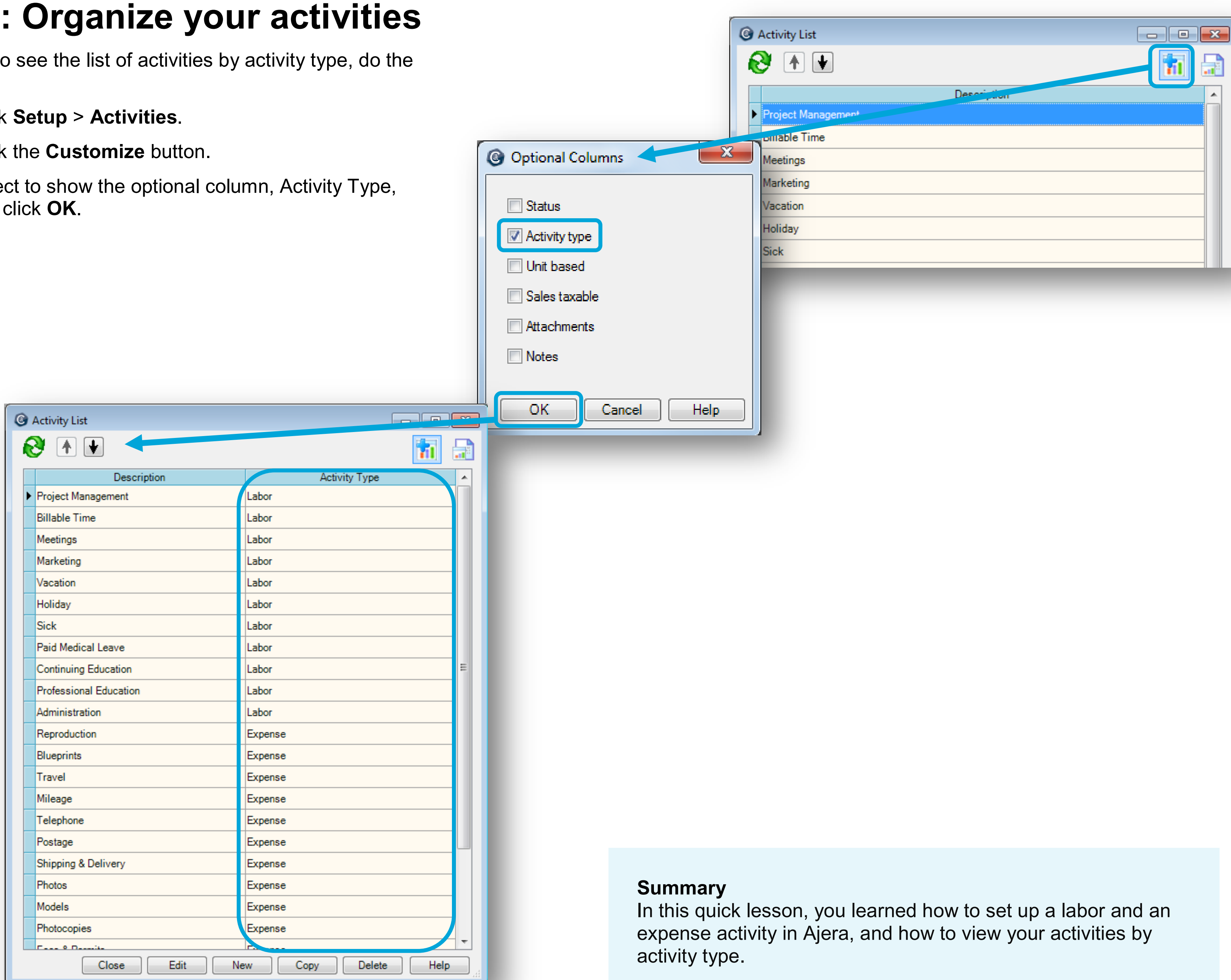


5. Be sure to save the new activity. As with the labor activity you created earlier in this quick lesson, move this new activity from the bottom of the list of activities, as needed.

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**.



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.