REPORTING: OTHER

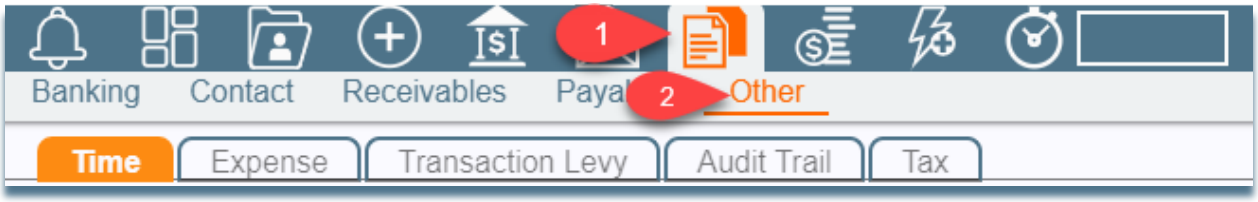
In This Document:

Walk through the different time listing reports available in Soluno®.
Learn how to edit and remove time entries from within time listing reports.
View a list of the possible report summaries you can generate.

This document utilizes Soluno version 1.5.65. Screens may have been adjusted since publication.

OVERVIEW

Important reports that handle productivity, taxes, and auditing can all be found under VIEWS AND REPORTS → OTHER.



After navigating to this screen, you will find up to five sub-menus. Three sub-menus (TIME, EXPENSE, and AUDIT TRAIL) will always be visible. Two additional sub-menus (TRANSACTION LEVY and TAX) will be available for Canadian firms.

Let's explore the different tabs in this section and look at the different reports you can generate.

TIME

Time listings, whether specific to the user entering them (MY DAILY TIME LISTING); or to a general firm list (TIME LISTING), are a convenient way to review time entries in Soluno.

Depending on the report type, you can also review, edit, and remove unbilled time entries from within the report.

VIEWS AVAILABLE:

daily time	A listing of time entries by entry date for the selected time range.
ebill	Lists time entries by entry date that are part of an electronic bill (e-bill).
Prod-billable	List of time entries with billable hours.
Prod-working	List of time entries with working hours.
summary	Lists all time, daily time, and time by task summaries in one document.
time	Provides the hours, rate, and total amount for all time listings for the selected date range plus the user who made the entry.

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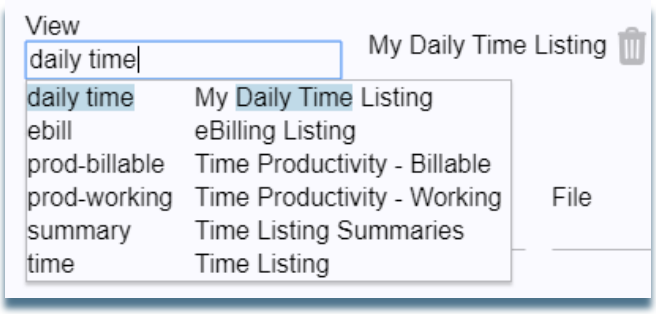
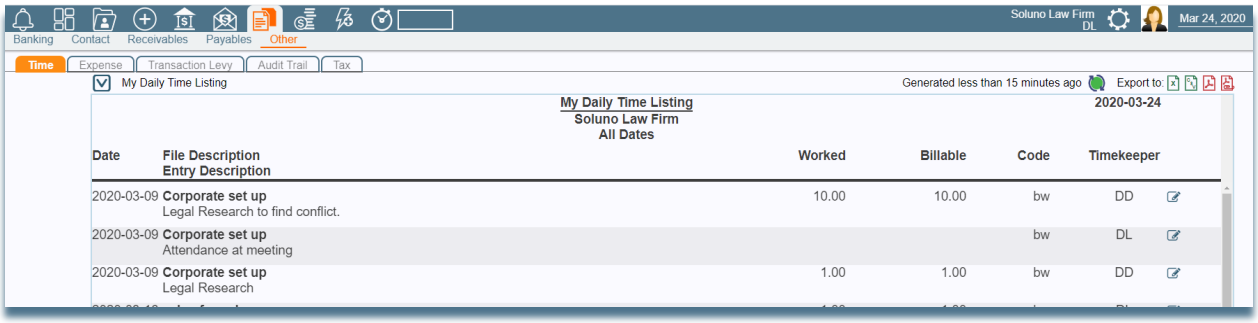
MY DAILY TIME LISTING

To review the My Daily Time Listing, select that option in the VIEW box.



Select any additional filtering you wish to apply (Start Date, End Date, File, etc.) and click on the PLAY ICON (pictured below) to generate the view.

Next, let us break down the information that is displayed.



DATE: This is the date of the time entry.

FILE/ENTRY DESCRIPTION: This field contains the explanation that was input when the time was entered.

WORKED: The number of hours of work done associated with the time entry.

BILLABE: The number of hours to be billed associated with the time entry.

CODE: This field contains the task code used for the entry. The default code is BW (Billable Work) if not specified in file manager.

TIMEKEEPER: This field indicates to which fee earner the time entry is accredited.

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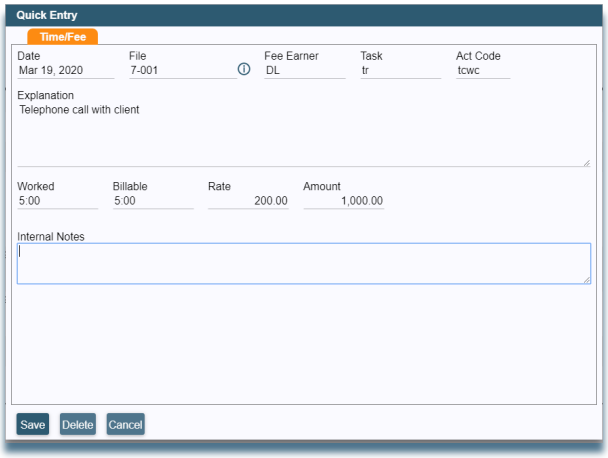
EDIT TIME ENTRIES

You can edit time entries in two ways, either by double-clicking on the entry, or by clicking on the EDIT ICON to the far right of the row (pictured below).

Once the entry is open, it will display all the fields which have been populated to create the time entry. This is the QUICK ENTRY window.



Within the Quick Entry window, you can click into each field to make any necessary changes and enter any INTERNAL NOTES required for the entry.

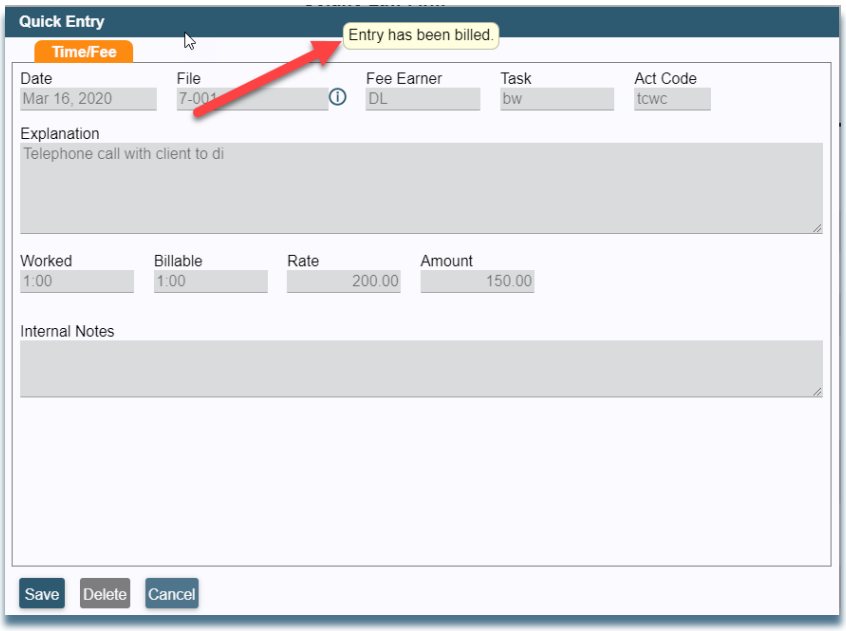
> *Note:* Some fields may not be visible or editable depending on your security access. Internal notes will not appear on the invoice once the time entry is billed.

Within the Quick Entry window, there is an INFORMATION ICON beside the File field.

Clicking this icon will show you the details of the file to which the time entry is applied.

Once you have made all necessary changes, click on the SAVE button in the bottom left hand corner of the edit window.

If you are trying to edit a time entry and all the fields are disabled, this means that the entry is currently locked and cannot be edited. The reason will be displayed at the top of the Quick Entry window.

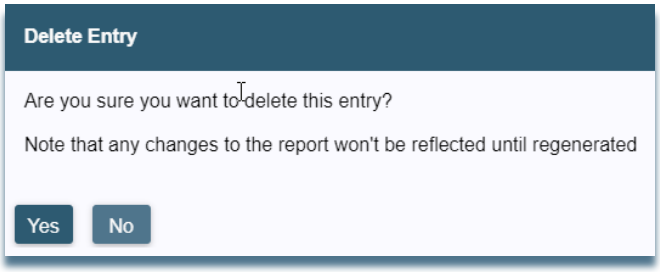


REMOVE A TIME ENTRY

If you wish to remove a time entry, click on the REMOVE ICON on the far right of the entry line.

Note: This icon will only appear if the time entry has not already been billed, and you are authorized to delete time entries.

Once you click on the remove icon you will be asked to confirm this action. Select YES to remove the time entry.



SUMMARIES

Soluno offers a series of summaries at the bottom of the time listing screen. This list can differ depending on reports construction; however the default list is as follows:

TIME SUMMARY BY FEE EARNER: Provides information about the different fee earners who have entries included in the report.

DAILY TIME SUMMARY (FEE EARNER'S NAME): Breaks down the amount of time entered by date, for each fee earner on the report, as well as any adjustments made to the time entries.

DAILY TIME SUMMARY- FIRM TOTALS: Shows the amount of time entered by date, for the firm, as well as any adjustments made to the time entries.

SUMMARIES ALSO INCLUDED ON THE TIME LISTING REPORT

TIME SUMMARY BY TASK AND FEE EARNER, BILLABLE: Summarizes the amount of billable work the fee earners have entered by task, as well as the percentage of the total billable time posted.

TIME SUMMARY BY TASK AND FEE EARNER, ADJUSTED: Breaks down the amount of adjustments made to posted time and fees by fee earner, as well as the percentage of the total adjusted time.

TIME SUMMARY BY TASK, BILLABLE: Shows the amount of the firm's time posted by task code.

TIME SUMMARY BY TASK, ADJUSTED: Summarizes the amount of the firm's time adjusted by task code.