

Setting up overhead groups

Goal: Set up overhead groups to simplify time entry and to track indirect time.

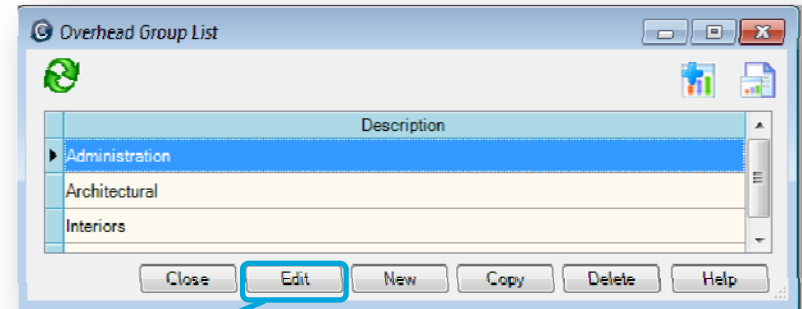
You set up overhead groups before employees start entering time. When you set up an employee, you assign that employee to an overhead group. The items in an overhead group appear in the Overhead area of an employee's timesheet. Examples of overhead group items are vacation, holiday, and administration.

1. Click **Setup > Overhead Groups**.

Ajera automatically sets up several overhead groups. You can use them as is, change them to work for your firm, or create new overhead groups from scratch.

This lesson will show how to change one of Ajera's predefined overhead groups.

2. Click the **Edit** button.
3. Change the overhead group and its items, as needed.

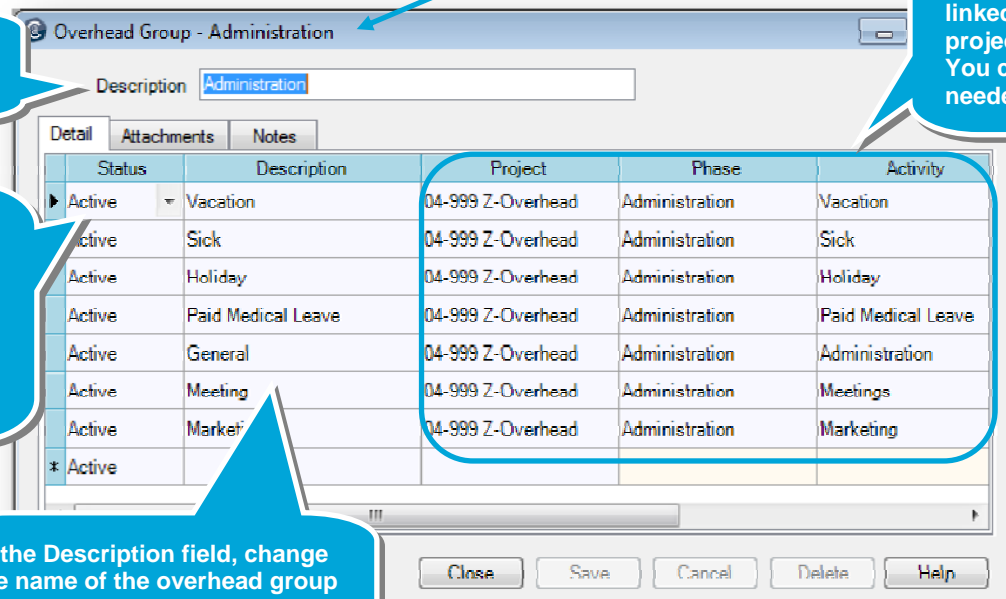


Change the name of the overhead group, as needed.

Ajera automatically sets the status of an overhead group item to Active. If you no longer wanted an item to appear on timesheets, you would change the status to Inactive.

In the Description field, change the name of the overhead group item, as needed. It appears on timesheets.

Each overhead group item is linked to an overhead project, phase, and activity. You can change them, as needed.



4. Continue changing, adding, and deleting overhead group items, as needed.
5. Remember to save your changes, when finished.

The screenshot shows a software window titled "Overhead Group - Administration". At the top, there is a "Description" field containing the word "Administration". Below this are tabs for "Detail", "Attachments", and "Notes". The main area is a table with the following columns: Status, Description, Project, Phase, Activity, Account, and Pay. The table contains several rows of data, including "Vacation", "Sick", "Holiday", "Paid Medical Leave", "General", "Meeting", and "Marketing". At the bottom of the window are buttons for "Close", "Save", "Cancel", "Delete", and "Help".

Four callout boxes provide additional information:

- Top right:** "Scroll to see the remaining columns." (points to the right side of the table)
- Bottom left:** "Add an additional overhead group item by entering it on the next available row." (points to the empty row at the bottom of the table)
- Bottom center:** "To delete an item, click the row in the table, and click the Delete button." (points to the "Delete" button)
- Bottom right:** "The pay indicates the way you want to report time on the paycheck stub (or if using a payroll service, in the payroll file). For example, if you were to select the Vacation pay, Ajera would report all time entered to this overhead group item as Vacation on the paycheck stub." (points to the "Pay" column)

Summary
 In this lesson, you learned how to set up overhead groups.
 Overhead groups provide you with a breakdown of how nonbillable time is spent by employee, department, and the firm. You can review how employees spend their time on the Employee Utilization report.