BS4Y Task & Time Management

User's guide

Audience: ordinary application users

Pages covered: Tool Task Management, Tool Task 2 Time Management, and Tool Favorite Task

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Contents

1. What the three pages are for

The pages support one connected workflow:

Page	When to use it	Main purpose
Tool Task Management	During the current workday	Enter a clear description of the work you performed, select the client and booking task, reuse favorites, or upload tasks from Excel.
Tool Favorite Task	Whenever you want to prepare or maintain reusable entries	Save task descriptions that you use regularly so that you do not have to type them again.
Tool Task 2 Time Management	After a workday is complete	Compare timer time with task entries, allocate or correct split time, check that the balance is zero, and export the result.

In short: enter today's tasks in **Task Management**, then use **Task 2 Time Management** for a completed day to check that the time is allocated correctly.

Important terms

- **Client**: the customer or internal project area to which the work belongs.
- **Booking Task**: the approved task/category under the selected client.
- **Work Task Load**: your specific description of the work performed. Write enough detail for another person to understand the result.
- **Favorite Task**: a reusable combination of project, booking task, and task text.
- **Duration / Worked**: time received from the timer system.
- **Split**: the part of the timer duration assigned to one task description.
- **Booked**: the sum of the split values assigned to the same timer group.
- **Open**: duration that is not yet allocated. It is calculated as `Duration - Booked`.
- **Balance**: booked time minus worked time across the currently loaded records. The desired result is `0`.

Time values are shown as decimal hours. For example, `0.5` is 30 minutes and `1.25` is 1 hour 15 minutes.

2. Sign in, move between pages, and sign out

Sign in

1. Open the application in your browser.
2. Select **Mit Microsoft anmelden**.
3. Complete the Microsoft sign-in process with your work account.
4. After sign-in, the application opens **Tool Task Management**.

Open one of the three pages

1. In the top navigation bar, select **Task & Time Management**.
2. Select one of these menu entries:
    - **Tool Task Management**
    - **Tool Task 2 Time Management**
    - **Tool Favorite Task**

Selecting the BS4Y application title also returns you to **Tool Task Management**.

Session timer

The clock at the top right shows the remaining signed-in time. When 30 minutes remain, the application asks whether you want to extend the session by 20 hours.

- Select **OK** to extend the session.
- Select **Cancel** if you are finished or do not want to extend it.
- Save any open changes before the timer reaches zero.

If the session expires during an action, reload the page, sign in again, and repeat the unsaved action.

Sign out

1. Select your name at the top right.
2. Select **Logout**.

3. Common controls and symbols

The application uses compact icon buttons. Move the pointer over a button to see its name.

Symbol	Meaning
+	Add a new record. On Task Management there are two plus buttons; their tooltips distinguish a new record from a favorite task.
Pencil	Edit the row.
Floppy disk	Save the open form or all edited values.
X	Cancel the open form or discard unsaved bulk changes.
Trash can	Delete one row or the selected rows.
Checkbox	Select a row. The checkbox in the column heading selects all rows visible on that page.
Upload arrow	Upload task rows from an Excel file.
Heart	Add a task to favorites or remove it from favorites.
Circular arrow	Refresh/recalculate time data.
Pencil in a box	Edit all split values at once.

Save and cancel

- Changes are not saved until you select the **floppy disk**.
- The **X** closes the edit area and discards changes that have not been saved.
- Closing a Work Task Load pop-up with **Cancel** discards changes made inside that pop-up only.
- After many save or delete actions, the page reloads automatically to show current data.

Filters

After changing a filter, select **Load**. Changing the **From** date automatically changes **To** to the same date; change **To** afterwards if you need a range.

Tables and pages

- Use the page numbers and, where shown, **Previous** and **Next** below a table to see more records.
- Task Management and Favorite Task show up to 30 records per page.
- A disabled button is not available for the current selection or for your access level.

4. Tool Task Management

Purpose

Use this page to record what you worked on today. Ordinary users see their own current-day entries. The **From** and **To** dates are fixed to today; this is intentional. You can still filter your entries by **Company**.

Each row contains:

Column	Meaning
Action	Edit, delete, or add/remove the row as a favorite.
Selection checkbox	Select the row for a multiple-row delete.
Client	The selected customer/project area.
Booking Task	The approved task category.
Work Task Load	Your detailed description of the work.
User	The person associated with the entry.
Create Date	When the record was first created.
Update Date	When the record was last changed.

The newest entries appear first.

Add a task manually

1. Select the first **+** button. Its tooltip is **Add record**.
2. Choose a **Client**.
3. In **Booking Task**, start typing a task name, issue key, or task number, or use the down-arrow to open the list.
4. Select a task from the search results. Typing text without selecting a valid result is not enough.
5. Select the **Work Task Load** field (the area showing *Insert your task details..*).
6. Enter a specific description of the work performed.
7. Select **Apply** in the Work Task Load pop-up.
8. Review the client, booking task, and description.
9. Select the **floppy disk** to save.

The application remembers your last client and booking task in this browser and suggests them the next time you add a normal record. Always check that the suggested values are correct.

Write a useful Work Task Load description

Prefer a result-oriented description, for example:

> Prepared and reviewed the July customer invoice report; corrected missing cost-center assignments.

Avoid descriptions such as “worked on project,” “meeting,” or “miscellaneous” without additional context.

The description is required. It is also sent through the application's automatic translation process when the record is saved. If translation is temporarily unavailable, the record is not saved; try again later.

Add a task from favorites

1. Select the second **+** button. Its tooltip is **Add from favorite task**.
2. If you have several favorites, select the required item in **Choose Favorite Task**.
3. The application fills the client, booking task, and Work Task Load.
4. Check the values and adjust the Work Task Load if necessary.
5. If the favorite does not contain a usable booking task, choose one from the search results.
6. Select the **floppy disk** to save today's entry.

If the application says **No favorite tasks were found**, create one on **Tool Favorite Task** or use the heart on an existing Task Management row.

Edit an entry

1. Find the row.
2. Select its **pencil**.
3. Change the client, booking task, or Work Task Load.
4. Select the **floppy disk** to save, or **X** to cancel.

Ordinary users can change only their own records.

Delete one entry

1. Select the **trash can** in the row.
2. Confirm **Delete this row?**

Deletion cannot be undone from this page. If you selected the wrong record, choose **Cancel** in the confirmation dialog.

Delete several entries

1. Select the checkbox beside each unwanted row.
2. To select every row on the current page, select the checkbox in the table heading.
3. Select the toolbar **trash can**.
4. Check the number in the confirmation message and confirm the deletion.

The toolbar trash button remains disabled until at least one row is selected. Selection applies to the current page, not to records on other pages.

Add or remove a favorite directly from a row

1. Find a row containing the client, booking task, and Work Task Load you want to reuse.
2. Select the **heart** in that row.

- An outlined heart means the row is not currently a favorite; selecting it adds the favorite.
- A filled heart means a matching favorite exists; selecting it removes the favorite.

This toggle acts immediately and does not ask for confirmation. A row cannot become a favorite if it has no project ID or its Work Task Load is empty.

Upload tasks from Excel

Use the **upload arrow** when you have a completed BS4Y task workbook.

File requirements

- Accepted formats are `.xlsx`, `.xlsm`, and `.xls`.
- A worksheet must contain columns named **Client**, **Project**, and **Task English**.
- **Project** in the workbook means the portal's **Booking Task**.
- Every non-empty task row must contain all three values.
- Client and Project values must match choices available in the portal.
- The workbook must provide a worker name through the standard **Worker** field.
- A date must be available in a **Date** or **Datum** column, in the standard template date field, on the template's Data sheet, or as an eight-digit `yyyyMMdd` value in the file name.

Use the approved company template whenever possible; it supplies the worker and date in the layout the importer expects.

Upload procedure

1. Select the **upload arrow**.
2. Choose the Excel file.
3. Wait while the progress indicator changes from uploading to processing.
4. Read the result message.
5. After a successful import, the page returns to its first page and displays the imported records.

The file is checked before records are imported. If any row fails validation, no rows from that upload are imported. The error message lists up to 12 issues and identifies the Excel row number. Correct all reported rows, then upload the file again.

Common upload errors include:

- missing Worker or Date/Datum information;
- a blank Client, Project, or Task English cell;

- a client that is not present in the portal;
- a project/booking task that is not available for the specified client;
- missing required column headings.

Filter and browse entries

1. Choose a **Company**, or leave **All clients** selected.
2. Select **Load**.
3. Use **Previous**, **Next**, or a page number below the table when more than 30 rows match.

For ordinary users, dates stay fixed to today and the User filter is not displayed.

5. Tool Favorite Task

Purpose

This page maintains your reusable task descriptions. Ordinary users see and manage their own favorites. A favorite does not itself create a dated task entry; you use it later from Task Management.

Each row shows the project, booking task, reusable task text, owner, and create/update dates.

Create a favorite

1. Select **+ Add record**.
2. Choose a **Project**.
3. Choose a **Booking Task**. The list is filled after you choose the project.
4. Enter the reusable **Task Text**.
5. Select the **floppy disk** to save.

All three fields are required. If **No booking tasks** appears, choose another project or contact the application administrator to have the project/task assignment checked.

Use task text that can be reused safely, but remember to add day-specific details when using the favorite if the work differs.

Edit a favorite

1. Select the row's **pencil**.
2. Change the project, booking task, or task text.
3. Select the **floppy disk** to save, or **X** to cancel.

Delete one favorite

1. Select the row's **trash can**.
2. Confirm **Delete this row?**

The favorite is removed from your reusable choices. This does not delete dated task records that were previously created from it.

Delete several favorites

1. Select the checkboxes beside the favorites.
2. Optionally use the heading checkbox to select all favorites on the current page.
3. Select the toolbar **trash can**.
4. Confirm the displayed number of rows.

Only records you are allowed to manage have edit, delete, and selection controls.

Browse a long favorites list

When more than 30 records are available, use the page numbers under the table. The current page number is highlighted.

Other way to manage favorites

You can add or remove a favorite by selecting the heart beside an existing row on **Tool Task Management**. Use **Tool Favorite Task** when you need to change the project, booking task, or wording.

6. Tool Task 2 Time Management

Purpose

Use this page to allocate completed timer time to your task descriptions and confirm that all worked time is booked. Ordinary users see their own records.

The page opens on the previous completed workday. For ordinary users, the selectable range normally runs from the first day of the current month through the previous workday. Today's rows are not available for ordinary-user editing because the workday is not yet complete.

Load a day or date range

1. Choose **From**. The application also sets **To** to that date.
2. If needed, choose a later **To** date within the allowed range.
3. Choose a **Company**, or leave **All clients** selected.
4. Select **Load**.

If the chosen dates are reversed, the application treats the earlier date as From and the later date as To.

Understand the main table

Column	Meaning
Action	Edit a row. Delete is disabled for ordinary users.
Date	Work date.
Client	Customer/project area.
Project	Booking task or time-system project.
Start / End	First and last timer times for the group.
Duration	Total timer duration for the group.
Task English	Task description assigned to the time.
Split	Amount of the group duration assigned to this row.
Booked	Sum of all splits in the group.
Open	`Duration - Booked`; the target is `0`.

When several task rows belong to the same timer group, Start, End, Duration, Booked, and Open are shown only on the first row of that group. Blank cells on the following rows do not mean the timer information is missing.

Read the summary above the table

- **Worked** is the timer duration across the loaded groups.
- **Booked** is the sum of the displayed split values.
- **Balance** is `Booked - Worked`.

A green **Balance: 0** means the loaded records are balanced. A negative balance means some worked time is not yet booked. A positive balance means more time is booked than was worked.

For a single group, use **Open** in the table: positive Open time is still unallocated; negative Open time is overbooked.

Refresh timer values

Select the **circular arrow** (**Update all times**) to reload timer data and recalculate the loaded records.

Use this when:

- timer entries were changed after the page was loaded;
- a newly entered task is not yet shown in this report;
- Duration, Booked, or Open appears out of date.

If a timer duration changed and the group's saved splits no longer equal it, refresh can redistribute that group's duration evenly across its task rows. Review the split values after refreshing.

Edit one split

1. Select the **pencil** beside the required row.
2. The edit area opens above the table.
3. For ordinary users, Client, Project, Favorite Task, and Task English are locked. Change **Split** only.
4. Watch the read-only **Booked** and **Open** preview values.
5. Select the **floppy disk** to save, or **X** to cancel.

Split cannot be negative, and the saved booked time cannot exceed the group's Duration. If the application reports a maximum allowed split, enter that value or a lower one, then adjust the other rows in the same group as needed.

Edit all splits at once

This is usually the fastest way to balance a day containing several task rows.

1. Select the **pencil-in-a-box** (**Edit all split times**).
2. Every Split cell becomes an input box.
3. Enter a non-negative decimal-hour value in each required row.
4. Check **Worked**, **Booked**, and **Balance** while editing; they update immediately.
5. Aim for **Balance: 0** and check each group's **Open** value after saving.
6. Select the **floppy disk** (**Save all split times**).

Select **X** (**Cancel split editing**) to discard all unsaved bulk changes. While bulk editing is active, the refresh button is disabled.

The bulk editor changes all rows in the currently loaded filter, including rows on other table pages. Review the date and company filters before saving.

Export to Excel

1. Load the correct date range and company.
2. Select **Export**.
3. Select **Excel Leistungsnachweis**.
4. Open or save the downloaded workbook according to your browser's prompt.

The export uses the current date and company filters and, for an ordinary user, includes that user's records.

Read the four lower summary panels

Below the main table are status and reference summaries:

1. **Employee sent Excel or added task manually** shows whether employee task information was submitted for the date.
2. **Tasks submitted for external projects** shows submission status by external project.
3. **Task count for external projects** shows how many tasks were submitted for each client/date.
4. **Timer summary** shows detailed timer totals by project, date, company, and timer task.

Green/positive rows indicate a submission was found; highlighted missing rows indicate that expected information was not found. Use these panels to identify missing task submissions before completing the report.

Pagination

The main table displays 30 rows at a time. Use the page numbers below it. Changing pages does not change the loaded filters.

7. Recommended daily workflow

During the day

1. Open **Tool Task Management**.
2. Add each meaningful work item manually, from a favorite, or through the approved Excel upload.
3. Check the client, booking task, and task details before saving.
4. Correct mistakes with the pencil while the entries are easy to identify.
5. Turn recurring entries into favorites with the heart.

On the next workday or after the timer day is complete

1. Open **Tool Task 2 Time Management**.
2. Load the completed workday.
3. Select **Update all times**.
4. Confirm that all expected tasks appear.
5. Use **Edit all split times** to allocate the duration across task descriptions.
6. Save and confirm that **Balance** is `0` and each relevant **Open** value is `0`.
7. Review the lower submission panels for missing information.
8. Export **Excel Leistungsnachweis** if required.

Occasionally

Open **Tool Favorite Task** to remove outdated favorites or improve their wording and booking-task assignment.

8. Messages and troubleshooting

“Please choose a booking task from the search results”

The text in the Booking Task box was typed but not selected as a valid portal option. Reopen the result list and select the required result.

“No matching booking task” or “No booking tasks”

Check the selected client/project first. Booking tasks depend on that selection. If the expected task still does not appear, contact the application administrator and provide the client and missing task name.

“Please enter the Work Task Load text”

Open Work Task Load, enter a description, select **Apply**, and then save the row.

Translation is unavailable

The application translates Work Task Load when it saves or imports a task. Leave the page open if practical, wait, and try the save/upload again. The unsuccessful action was not saved.

Excel upload rejected

Read every listed row error. Correct the workbook so that Client and Project match portal choices and all required values, Worker, and Date are available. Then upload the full file again. A rejected validation does not partially import the valid rows.

Balance is not zero

1. Check that the correct date range and company are loaded.
2. Select **Update all times**.
3. Use bulk split editing.
4. Adjust the splits until Booked equals Worked.
5. Save, then check each affected group's Open value.

Pencil or trash button is disabled

- Ordinary users can edit only completed (past) Time Management rows.
- Ordinary users cannot delete rows from Task 2 Time Management.
- On Favorite Task, only the owner of a favorite can manage it.
- A toolbar trash button stays disabled until at least one checkbox is selected.

“Your session has expired”

Reload the page, sign in again, and repeat the last unsaved action. Saved actions remain in the system.

Yellow database warning / data unavailable

The page automatically retries after approximately 30 seconds. Avoid making edits until the data has loaded. If the warning continues after several retries, contact application support and include the page name and the exact message.

The table says no data was found

Check the date and company filters. On Task Management, ordinary users see today's own entries. On Time Management, ordinary users see their own records within the permitted completed-workday range.

A save or delete appears not to work

Do not repeat the action rapidly. Wait for the automatic reload, then check whether the row changed. If an error appears, copy the exact message for support.

9. Quick reference

Add today's task

Task Management → first + → Client → Booking Task result → Work Task Load → Apply → Save

Reuse a favorite today

Task Management → second + → choose favorite → check details → Save

Create a reusable favorite

Favorite Task → + → Project → Booking Task → Task Text → Save

Balance a completed day

Task 2 Time Management → choose date → Load → Update all times → Edit all split times → Balance 0 → Save

Export a report

Task 2 Time Management → load filters → Export → Excel Leistungsnachweis

Get help

When reporting a problem, include:

- the page name;
- the selected date range and company;
- the exact error message;
- the Excel row number when an upload failed;
- whether the action was add, edit, delete, refresh, or export.