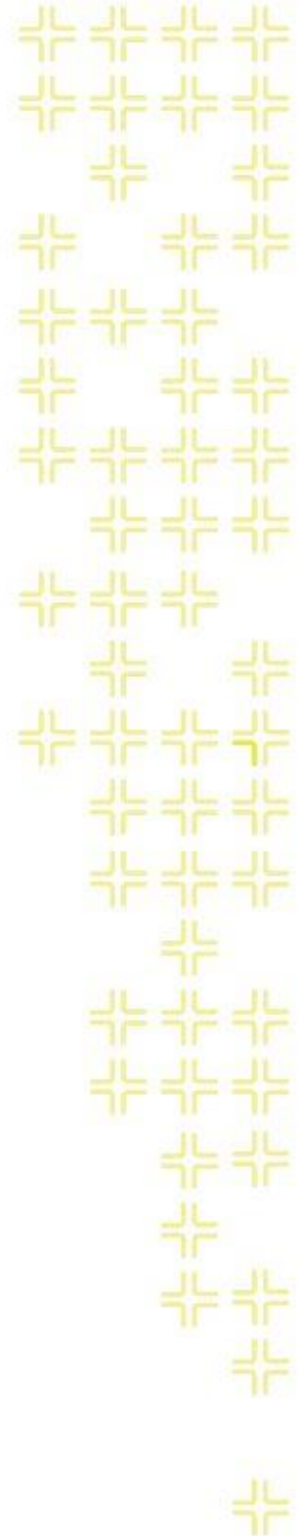




TRAINING GUIDE

Timesheets



Timesheets

The Timesheet system is available within the Lucyty web application. It allows a Lucyty user to track work tasks and hours in a given pay period. A timesheet user can view Work Order tasks and hours as well as open the related Work Orders from within the timesheet system. Timesheets can be approved and locked before they are submitted to payroll. Timesheet pay periods can also be customized and reports generated summarizing employee task hours. There are multiple levels of security permissions available to enable different functional levels of timesheet users.

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Launching Timesheets



To launch the features of the Timesheet system, click the Timesheet button in the Application Toolbar. One or more of these timesheets components will be available but will vary depending on the user's configuration:

- One or more Timesheet Forms
- Timesheet Overview
- Pay Period Management
- Payroll Admin

Timesheet Forms

A timesheet user may be granted access to one or more timesheet forms that are available from the Timesheet menu. The names and fields shown on these forms are customizable by your Timesheet Administrator. These forms are used to view time from Work Order tasks but also input additional work tasks/hours, if desired. When a timesheet form is selected, it will display the pay period that is closest to today's date.

A timesheet form is made up of three grids: Linked Work, Additional Time, and Summary. The fields which display in these grids may be configured by your Timesheet Administrator.

- **Linked Work:** Timesheet tasks that are associated with Work Orders will display in the *Linked Work* grid. The related Work Orders can be opened from this grid.

Note: Work Order Tasks as well as Work Order Employee Resource hours, account numbers, and project numbers added through the Work Orders module that are in the Linked Work grid will show as read-only and cannot be edited using the timesheet forms. However, when the Work Order is opened from within this grid, this information can be added and edited there.

- **Additional Time:** Users may add or alter tasks beyond what is logged in Work Orders for the set pay period in the *Additional Time* section. The number of hours worked can be inputted or changed here.
- **Summary:** Hours added both through the *Additional Time* grid and from Work Orders are totalled automatically by the system. The system displays these work hour totals in the *Summary* section of the timesheet display.

You must be an active Work Employee to add or edit time through the timesheet forms.

Notes: _____

Here's an example of one timesheet form with the three grid sections highlighted:



The screenshot shows a web application interface for a timesheet. At the top, there is a header with the Lucity logo, a home button, and a user profile for Alex Gibson. Below the header, there is a navigation bar with a home button and a link to 'Lucity Timesheet with More Fields (Alex Gibson)'. The main content area is divided into three sections, each with a title bar and a 'View' button:

- Summary:** A table with columns for Description, Work Order, Account Number, Project Number, Time Code, Total Hours, and days of the week (Tues 8/1 to Sat 8/12). The 'Daily Totals' row shows 20.5 total hours.
- Additional Time:** A table with the same columns as the Summary section. It contains one row for 'Project Management' with a total of 3 hours on Tues 8/1.
- Linked Work:** A table with the same columns. It lists tasks with checkboxes: 'Flashing' (5.5 hours), 'Hydrant Valve Maintenance' (7 hours), 'Install New Duct Work' (2 hours), and 'Servicing' (2 hours).

Viewing Tasks from Work Orders

Timesheet tasks and hours that are associated with the employee's Work Orders in a given pay period will display in the *Linked Work* grid. The Account Number and Project Number associated with Work Order Employee Resource will also display if those fields are on the timesheet form. The Work Order tasks cannot be altered from within timesheet forms but the daily hours and totals will be included in the *Summary* section. The linked Work Orders can easily be opened into the Work Orders module where the tasks can be added or changed for those users who have been granted the proper Work Order security permissions.


To open the tasks in the *Linked Work* grid:

1. Select the task(s) you wish to view using this checkbox:
2. Click the Open View button  to open the Work Orders associated with those tasks. The Work Orders module will open.
3. If desired, the time on the Work Order employee resource can then be changed and saved from within the Work Order module. If the task, time or other employee resource information is changed on the Work Order, the changed information and new totals can be viewed on the timesheet by clicking the Refresh button  in the *Summary* section.




Adding Tasks through Work Orders

In order for the tasks from Work Orders to display in the *Linked Work* section, an employee must be included as a Work Order resource in the pay period, as in the following steps:

1. Add the employee as a resource to the Work Order subtask.
2. Fill out one or more of the Units fields and select the Time Code on the Employee Resource:

Units	Regular Hrs	Overtime Hrs
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Time Cost		
<input type="text" value="1"/>	<input type="text" value="REGULAR TIME"/>	

3. Fill out the resource start and end date populated within the timesheet pay period:



Res Start Date		Res Start Time	<input type="text"/>	
<input type="text" value="8/10/2017"/>				
Res End Date		Res End Time	<input type="text"/>	
<input type="text" value="8/10/2017"/>				





4. The Account # and Project # selected on the Work Order employee resource can also display in the *Linked Work* grid if the grid is configured to display those fields.

Note: The timesheet grids may need to be refreshed in order to reflect any changes made to the Work Order.

Adding/Editing/Deleting Additional Tasks



A timesheet user can add as many extra work tasks in the *Additional Time* section as needed for each pay period in the timesheet forms. To add a new work task and hours, complete the steps below:

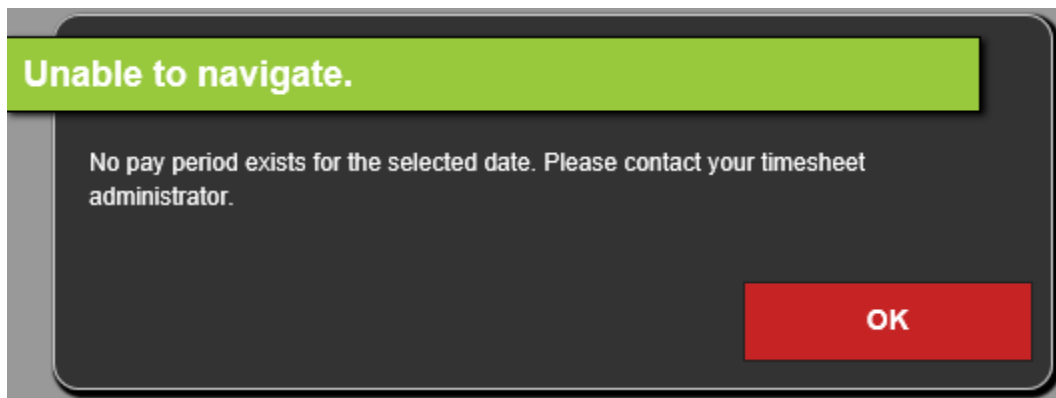
1. Click the  button. A new blank line will be added to your Timesheet grid.
2. Type a description of the work task into the Description field.
3. Use the drop-down list to select a Time Code (Regular Time, Overtime, etc.) that will reflect how the task should be billed. A new task will default to “1/Regular Time” (if that Time Code exists).
4. Enter the hours worked on the task in each of the daily hour fields.
5. If the Timesheet Form has been configured with the Account Number or Project Number, you can also select or enter data into those fields.
6. If the Timesheet Form was configured to display the Task field, use the drop-down list to select the Task.
7. Click the Save button  to save the record. This will recalculate the hour totals at the top of each daily column in the *Summary* section. A red triangle above a cell indicates that a change was made that hasn't yet been saved.
8. To make changes to your work tasks or hours, just type in the change. The grid defaults to edit mode.

9. If needed, click the Cancel button  to cancel any changes.
10. To remove a row, click on the checkbox to the left of the task  that you wish to delete and click the delete button . You will receive a confirmation message before the deletion happens.
Note: You cannot edit or delete the Totals at the top of the timesheet forms or the hours carried over from Work Orders in the Linked Work section at the bottom of the timesheet forms.
11. To copy the tasks from the previous pay period, click the “Copy from Previous Period” button . The copied tasks will be brought into the current pay period but defaulted to zero hours so the new time can be entered and saved.

Navigating through Pay Periods

A timesheet user can navigate to different pay periods by doing the following:

1. Click the navigation arrows: . These buttons will move you between the pre-configured pay periods.
2. Alternatively, you may select a date on the calendar using the date picker: . The system will take you to the pay period where the selected date resides. If there is no pay period configured for that selected date, you will receive a message that no pay period exists for the selected date:



Hiding/Showing Grids

There may be times when you do not wish to see one or more of the timesheet grids within the form. You can hide or show the *Summary*, *Additional Time*, or *Linked Work* grids by clicking one or more of these Hide/Show buttons below. This setting will remain the next time you open that timesheet form.

1. To hide/show the *Summary* grid, click one of these buttons:



2. To hide/show the *Additional Time* grid, click one of these buttons:




3. To hide/show the *Linked Work* grid, click one of these buttons:




Running a Timesheet Report for Current User

A report can be generated for the current timesheet user showing the tasks logged and the task totals for the selected pay period. The timesheet report can be configured by the Timesheet Administrator to display one or two weeks at a time. The report can also be configured to display the task description only or additional fields such as Class, Account #, Project #, and Time Code. Steps to generate a report for the current timesheet user:

1. Click the report icon  .
2. Enter the desired starting date in **YYYYMMDD** format of the report and an optional report subtitle if your reports are configured to prompt for a subtitle:

Enter the Starting Date :
(Please use yyyyymmdd format)



Enter Subtitle Here (Not Required):

- Click OK to display the report. Here's an example of a 1-week report which shows the task description:

Timesheet for One Week									
									8/29/2017 8:50 AM
8/16/2017 To 8/22/2017									
Employee Name	Day	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Total
Task	Date	08/16	08/17	08/18	08/19	08/20	08/21	08/22	
Victoria Gibson									
Fleet Repair		3.00	0.00	0.00	0.00	0.00	0.00	0.00	3.00
Maintenance		0.00	0.00	4.00	0.00	0.00	0.00	0.00	4.00
Total Hours		3.00	0.00	4.00	0.00	0.00	0.00	0.00	7.00

Submitting a Timesheet

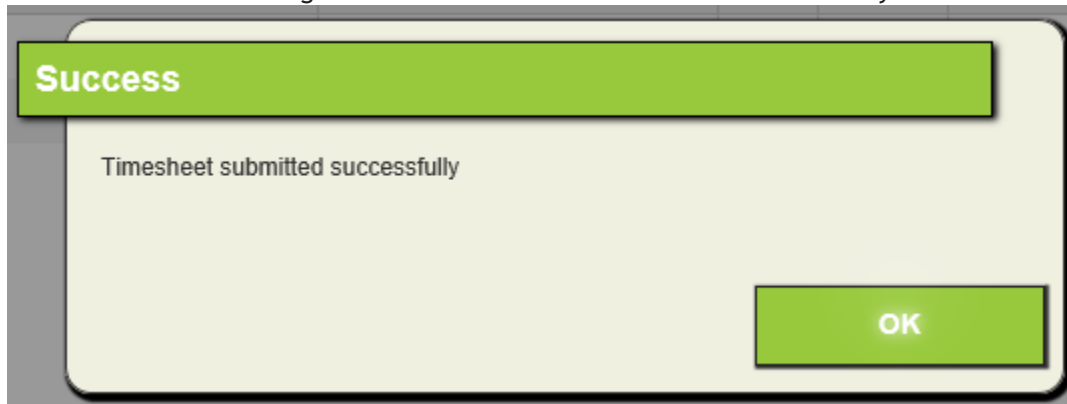
A timesheet may be submitted to indicate to the supervisor or payroll administrator that it has been completed for a given pay period. After the Submit button is clicked, an indicator is turned on in Timesheet Overview showing that the timesheet has been submitted. To submit a timesheet, complete the steps below:

- Verify that all your tasks and hours are correct for the pay period.

- Click the Submit button in the upper right corner of the timesheet form:



- You will receive a message that the timesheet was submitted successfully:



- You will see a message next to the Submit button telling you when the timesheet was last submitted.
- You may still make changes to the timesheet after submitting the timesheet. You may re-submit the timesheet after you make the changes, if desired.

Timesheet Overview




The Timesheet Overview is available from the Timesheet menu. It allows for approving and locking employee records, opening employee timesheet records, and creating reports.

Approving/Locking Timesheets



Employees configured as supervisors or pay clerks/payroll administrators with the proper security permissions can approve, lock, and edit employee timesheets. When a timesheet has been approved or locked, an employee will no longer be able to make changes to it. When an employee whose timesheet is locked attempts to open it, he/she will receive a message such as, “This period has been approved/locked and cannot be edited.” Additionally, if the Work Option “Enable Timesheet Locking” is set to true, timesheet users will not be able to edit or delete the work order resource associated with the locked timesheet or add a new work order resource for the locked time period.

If you have been granted the Timesheet security permission of “Allowed to Approve Timesheets” and you are configured as a supervisor, when you log into Timesheet Overview, you will see the employees listed who report to you, other supervisors under you in the hierarchy, and the employees of those supervisors. You may approve of one or more of those timesheet records separately or all together.

To approve timesheets, follow these steps:



1. Select the record(s) you wish to approve using the checkbox  to the left of the employee record(s).
2. Click the Toggle Approve button .
3. The timesheet(s) records will then show with the “Approved” checkbox  set to True.

To clear the approved status, follow these steps:

1. Select the record(s) you wish to clear using the checkbox  to the left of the employee record(s).
2. Click the Toggle Approve button .
3. The timesheet(s) records will no longer show as “Approved”.


If you have been granted the Timesheet security permission of “Allowed to Approve and Lock Timesheets”, you will be allowed to approve and lock timesheets with a single click. You will be allowed to approve and lock timesheets of all employees in the timesheet system unless you have been configured to only lock the timesheets of employees within certain departments.

To approve AND lock timesheets, follow these steps:

1. Select the record(s) you wish to approve and lock using the checkbox  to the left of the employee record(s).
2. Click the Lock button .

3. The timesheet(s) records will then show with the “Approved” and “Locked” checkboxes set to True .


To clear the approved and lock status, follow these steps:

1. Select the record(s) you wish to clear using the checkbox to the left of the employee record(s).
2. Click the Lock button  .
3. The timesheet(s) records will no longer show as “Approved” and “Locked”.

Opening/Editing Timesheets

Within Timesheet Overview, the user may wish to open one or more employee timesheets to view the details and/or to edit them. For example, a user may wish to review an employee’s timesheet before approving and locking it. Or, maybe an employee is on vacation and is unable to complete his/her own timesheet and a supervisor may want to complete it.

To open a timesheet from Timesheet Overview, do the following:

1. Select the pay period of the timesheets that you would like to view.
2. Select the employee(s) records which you wish to view by clicking the checkbox to the left of the employee record(s).
3. Click the Open View button  to open the timesheet associated with the employee(s).
4. Each selected employee’s timesheet for that pay period will open in a separate tab.
5. If you have been granted the permission to edit the employees’ timesheets, then you can make changes to the selected employee timesheets.

Changing Record Display

There are a few ways to change the records displayed in Timesheet Overview. You may wish to search the records, filter by Supervisor/All Employees, sort the data, or filter by Time Code.


Searching

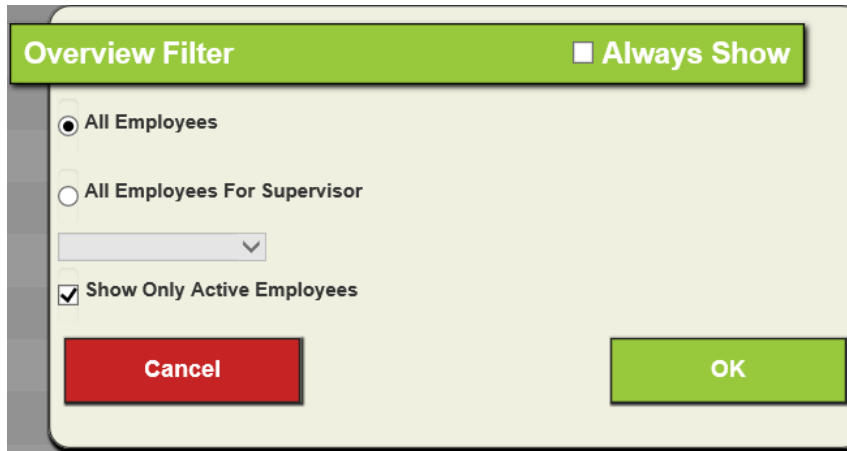
One way to quickly find employee or supervisor records in Timesheet Overview is to use the Search box at the top of the grid:

If you enter text into this box, then the records will be filtered based on this text.

Filtering by Supervisor/All Employees/Active Employees

You may wish to display only the employees of specific supervisors, show active/inactive employees, or revert back to all employees. To filter by supervisor, all employees, or active/inactive employees, do the following:

1. Click the Change Filter icon . This dialog will appear with one or more of these options depending on your permissions:



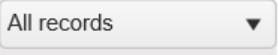
2. Choose the filter view you would like to see: All Employees (if you have been granted the “Allowed to Approve and Lock Timesheets” permission) or All Employees for a specific Supervisor. By default, the supervisor selected will be the supervisor logged into the timesheet system.
3. By default, the list of employees in Timesheet Overview displays only Active employees but the “Show Only Active Employees” option can be de-selected to also show inactive employees.

Note: This Active property is configured in the Work Employee Setup module.

4. Click OK. Both the selected supervisor, supervisors under that supervisor, and employees of the selected supervisor will then display.
5. If you wish for this Filter dialog to open every time Timesheet Overview is opened, you can select the “Always Show” checkbox:





Filtering by Time Code

1. You can sort the records in Timesheet Overview by Time Code by clicking this drop down list for Time Code in the upper right: 
2. Once you select a Time Code, only those employees will show who have logged time in the current pay period using the selected Time Code.
3. Filter on “All records” to restore the records to the original list.

Running a Timesheet Report for Multiple Employees

A report can be generated for selected employees showing their tasks and task totals within the current pay period. The timesheet report can be configured by the Timesheet Administrator to display one or two weeks at a time. The report can also be configured to display the task description only or additional fields such as Class, Account #, Project #, and Time Code. Steps to generate a report for one or more employees:

1. Select one or more employee records using the checkbox  to the left of each record that you wish to include on the report.
2. Click the report icon .
3. Enter the desired starting date in YYYYMMDD format of the report and an optional report subtitle if your reports are configured to prompt for a subtitle:

Enter the Starting Date :
 (Please use yyyyymmdd format)

Enter Subtitle Here (Not Required):

OK


Your Filter has been converted for Crystal Reports.

4. Click OK to display the report. Here's an example of a 1-week report which shows the task description and the extra report fields:

Timesheet for One Week													9/6/2017	
1/9/2017 To 1/15/2017													11:07 AM	
Employee Name	Task	Class	Account #	Project #	Time Code	Day	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Adrian Zavala	Troubleshoot				REGULAR TIME		0.00	0.00	0.00	1.00	0.00	0.00	0.00	1.00
	Repair						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Total Hours							0.00	0.00	0.00	1.00	0.00	0.00	1.00
	Elizabeth Sirois													
Elizabeth Sirois	Inspect						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Troubleshoot				REGULAR TIME		0.00	0.00	0.00	0.00	0.00	0.00	1.00	1.00
	Repair				REGULAR TIME		0.00	0.00	0.00	0.00	2.00	0.00	0.00	2.00
Total Hours							0.00	0.00	0.00	0.00	2.00	0.00	1.00	3.00

Refreshing Timesheet Data

The data showing in the timesheet forms or in Timesheet Overview may need to be updated to reflect a recent change outside of the grids that are showing. To refresh the data showing in the timesheet

grids, click the refresh button .

Sorting Records

Records in the Timesheet Form and Timesheet Overview grids can be sorted using a selected column as the sort criteria. To modify the sort order in one of those grids:

1. Click on the column header that you wish to use to sort the data. Clicking it the first time will make it to sort in ascending order.
2. Click it again to sort in descending order.
3. Click it a 3rd time to reset to the default sort order.


Payroll Admin Management

The Payroll Admin Management user interface (new for Lucity Release 17.5) is available from the Timesheet menu. This interface allows Timesheet Administrators to configure payroll administrators to access to only certain departments when using Timesheet Overview. To use the Payroll Admin Management user interface, do the following:

1. Select the Payroll Admin link on the Timesheet menu. This will open the Payroll Admin Management dialog. The department grid will be grayed out until a specific user name is selected in the Payroll Admins drop down list:

Assigned	Department	Department Code
<input type="checkbox"/>	Operations	O
<input type="checkbox"/>	311 Center	O3
<input type="checkbox"/>	Administration	OA
<input type="checkbox"/>	Facilities	OB
<input type="checkbox"/>	Compliance	OC
<input type="checkbox"/>	FOG	OCF
<input type="checkbox"/>	IPT	OCI
<input type="checkbox"/>	NPDES	OCN
<input type="checkbox"/>	Fleet	OF
<input type="checkbox"/>	Public Services	P
<input type="checkbox"/>	Bridges	PB
<input type="checkbox"/>	Storm	PM
<input type="checkbox"/>	Parks	PP
<input type="checkbox"/>	Pool Maintenance	PPO
<input type="checkbox"/>	Parks Maintenance	PPP
<input type="checkbox"/>	Tree Maintenance	PPT
<input type="checkbox"/>	Streets	PS

2. On the drop down list for Payroll Admins, you will see those users who have been configured as Payroll Administrators. Select the Payroll Admin user that you wish to configure.

- On the right, you will see all the Departments that are configured in the Lucity system. Select the checkbox  to the left of the desired Department(s) to which you want to grant access to the Payroll Admin as in the following example:

Payroll Admin Management			
Nathan Gibson	Assigned	Department	Department Code
	<input type="checkbox"/>	Traffic	PT
	<input type="checkbox"/>	Street Lights	PTL
	<input type="checkbox"/>	Pavement Markings	PTP
	<input type="checkbox"/>	Signs	PTS
	<input type="checkbox"/>	Traffic Signals	PTT
	<input type="checkbox"/>	Utilities	U
	<input type="checkbox"/>	Solid Waste	UO
	<input type="checkbox"/>	Solid Waste Collections	UOC
	<input type="checkbox"/>	Landfill	UOL
	<input type="checkbox"/>	Water Quality	UQ
	<input checked="" type="checkbox"/>	Wastewater	US
	<input type="checkbox"/>	Sewer Collections	USC
	<input checked="" type="checkbox"/>	Wastewater Plant	USP
	<input type="checkbox"/>	Sewer Pump Station	USU

- Click *Save*.
- Click *Done* to exit the Payroll Admin Management dialog.
- The next time the selected Payroll Admin user opens Timesheet Overview, he/she will see only those users who have been assigned to those departments (i.e., those employees assigned that Department in the Work Employee Setup module).

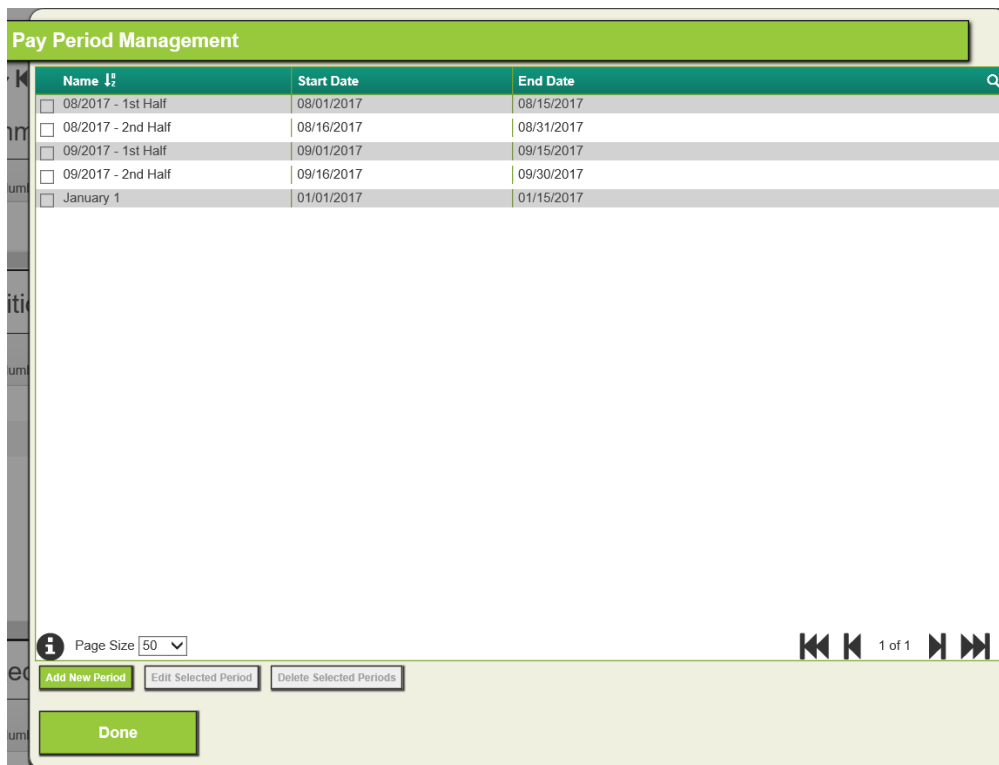
Notes: _____

Pay Period Management

The Pay Period management tool is also available from the Timesheet menu. The Pay Period Management tool allows those users who have been granted the Timesheet security permission of “Allowed to Edit Pay Periods” to set up the pay periods for the year. Once setup, employees will be limited to those pay periods when entering their time in the timesheet system.

Note: The pay periods can be set up to display any date range. Example: If employees are paid the 15th of each month and the last day of each month, you could set up June to display June 1st through June 15th and June 16th through June 30th. However, in July you could set up the pay periods to be July 1st through July 15th and July 16th through July 31st. If you have unusual pay periods, you are able to set up each one individually.


1. To access the functions in Pay Period Management, select the Pay Period Management tool from the Timesheet menu. The following dialog will appear showing any existing pay periods:

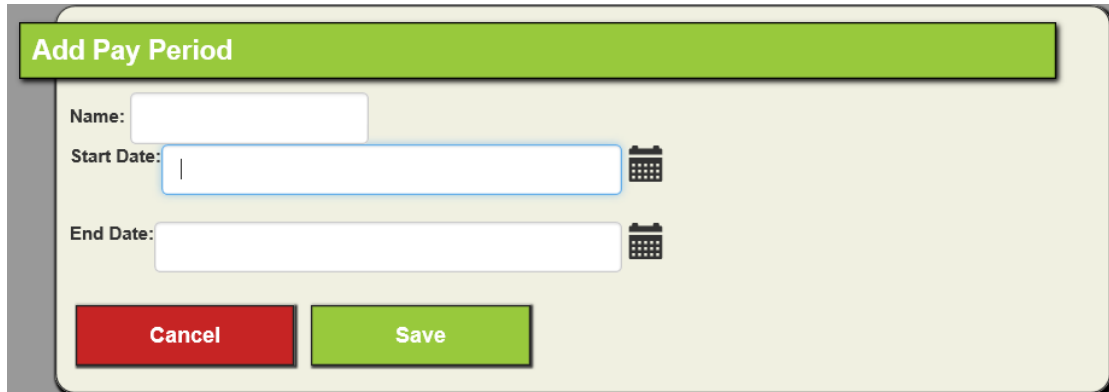


2. Click the Done button to close the Pay Period Management dialog.

Notes: _____


Adding a Pay Period

1. To add a pay period, click the Add New Period button  and the following dialog will appear:




The dialog box titled "Add Pay Period" contains the following fields and buttons:

- Name:** A text input field.
- Start Date:** A date input field with a calendar icon to its right.
- End Date:** A date input field with a calendar icon to its right.
- Buttons:** A red "Cancel" button and a green "Save" button.


2. Give the pay period a name.
3. Use the calendar icons  or type in a date in MM/DD/YYYY format to set the Start and End Dates.
4. Click **Save**.

Editing a Pay Period

1. To edit a pay period, select the pay period you wish to change.
2. Click the Edit Selected Period button: 
3. Make the desired changes and click **Save**.

Note: You will not be able to edit a pay period if there has been time logged outside of Work Orders during that pay period on an employee timesheet.

Deleting a Pay Period

1. To delete a pay period, select the pay period that you wish to delete.
2. Click the Delete Selected Periods button: 
3. The pay period will be deleted.

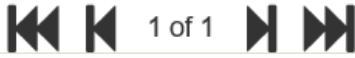
Note: You will not be able to delete a pay period if there has been time logged outside of Work Orders during that pay period on an employee timesheet.

Sorting Pay Periods

1. To sort the pay periods, click on the column that you wish to use for the sort criteria.
2. Clicking them once will sort the pay periods in ascending order.
3. Clicking them a second time will sort the pay periods in descending order.

Navigating Pages



If there are a lot of Pay Period records, there are a couple of ways to make navigating the data easier.

1. The navigation arrows  may be used to go from page to page or to the first/last pages.
2. The Page Size drop down may be changed to show from 50-250 records at a time.

Note: Selecting a large page size may affect performance.

Searching Pay Periods

Pay periods may be searched by doing the following:

1. Click on the Search button 
2. Type the name of the pay period or text you wish to search in the Search field:
 
3. The grid will display the results of the search criteria.
4. To restore the full list, delete the text in the Search field.

Notes: _____

Timesheet Configuration

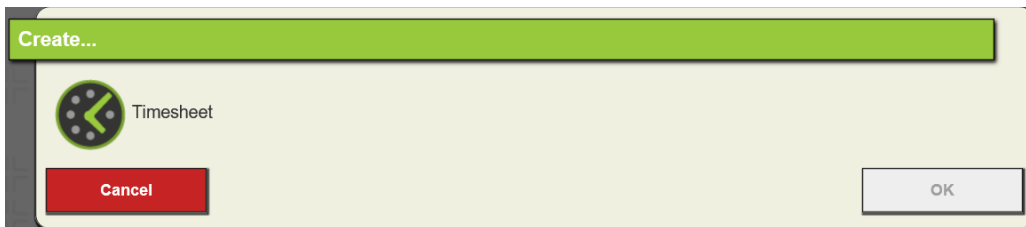
Creating Timesheet Forms

One or more timesheet forms must be configured and assigned before employees can use the Timesheet system. Users who have been granted the Timesheet security permission of “Allowed to Create and Assign Timesheets” can create timesheet forms and assign them to groups of users. One or more of these fields can be added to the forms: Task Description, Account Number, Project Number, Work Order #, Class, and Tasks. To create a timesheet form, follow these steps:

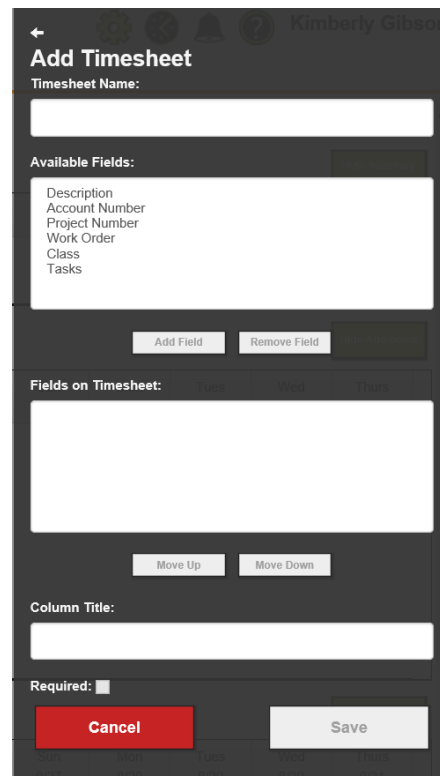
1. From the username in the top of the web application, select “Create New”:




2. The following pop-up should appear:



3. Select Timesheet.
4. Click OK. This new “Add Timesheet” dialog should appear:



The following functions are available when adding timesheet forms:

 Move Pane	Switches the side of the screen on which the edit pane appears.
Timesheet Name	Identifies the name of the <i>Timesheet</i> . This is the name that will appear in the <i>Timesheet</i> menu.
Available Fields	Displays a list of fields that can be added to the <i>Timesheet</i> but do not appear in it yet.
Add Field	Adds the field selected in the <i>Available Fields</i> list to the <i>Fields for Timesheet</i> list.
Remove Field	Removes the field selected in the <i>Fields for Timesheet</i> list and returns it to the <i>Available Fields</i> list.
Fields on Timesheet	Displays the fields currently displayed on the <i>Timesheet</i> . Fields closer to the top of this list appear further to the left in the <i>Timesheet</i> . Note: All fields added to the <i>Timesheet</i> are displayed in the Timesheet's three grids (<i>Summary</i> , <i>Additional Time</i> and <i>Linked Work</i>), even if a particular field isn't populated by one of the grids. Doing so keeps the grids' lengths the same, which makes the <i>Timesheet</i> easier to read.
Move Up	Moves the field selected in the <i>Fields for Timesheet</i> list further up in the hierarchy.
Move Down	Moves the field selected in the <i>Fields for Timesheet</i> list further down in the hierarchy.
Column Title	Identifies the column that is currently selected in the <i>Fields on Timesheet</i> list. Use this field to modify how the column name appears in the <i>Timesheet</i> .
Required	Indicates if this field should be mandatory.
Cancel	Revokes all edits and closes the edit pane.
Save	Retains all edits and closes the edit pane.

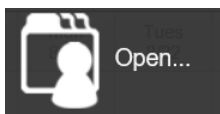
Changing Timesheet Forms

Timesheet forms can easily be changed once they are created.

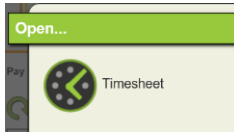
Timesheet Form Not Yet Open

To make changes to a timesheet form that is not yet open, you must first open the timesheet. This will put you in the “Edit Timesheet” mode.

1. From the username in the top of the web application, select “Open”:




2. Select Timesheet:




3. Click **OK**.
4. Select the Timesheet Form you would like to change.
5. Click **OK**.
6. You will now be in “Edit Timesheet” mode. Make the desired changes to the form and click **Save** to save changes or **Cancel** to revert changes.

Timesheet Already Open

To edit a form that has already been opened, do the following:


1. From the open timesheet form, click the “Enter Design Mode” button: . This will put you back in “Edit Timesheet” mode and you can make your desired changes.

Deleting Timesheet Forms


1. To delete a form, you must first open it or be in “Edit Timesheet” mode as per the above instructions.
2. Once the form is in “Edit Timesheet” mode, click the Delete button: .
3. You will receive a confirmation message. Click **Yes** to confirm the deletion.

Assigning Timesheet Forms

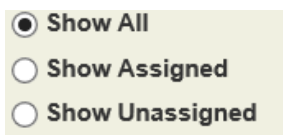
Timesheet forms like web forms must be assigned to security user groups before the users in the group will be able to use them. To assign a security group to a timesheet form, do the following:


1. After creating or opening a timesheet form, click the “Manage User Groups” button  in the upper right of the Timesheet form. If you are in “Edit Timesheet” mode, click the Cancel button in order to see the “Manage User Groups” button.

2. This will open the “Manage Groups for <Timesheet Form>” dialog.

3. Click the “Assign Group” button  next to each group that you wish to assign to the timesheet form.

4. You may filter the list of security groups to show all, those already assigned, or those not yet assigned by clicking one of these radio buttons:

A screenshot of a dialog box showing three radio button options for filtering security groups. The first option is 'Show All', which is selected with a filled radio button. The second option is 'Show Assigned', which is unselected with an empty radio button. The third option is 'Show Unassigned', which is unselected with an empty radio button. The options are listed vertically on a light green background.

5. To remove a group from a timesheet form, click the “Remove Group” button: .
6. Click **Done** when finished.

Field Information

Some fields are automatically included and some are optional on the timesheet forms. The functionality and editability of these fields can vary depending on the section of the timesheet form.

Time Code

The Time Code field is automatically included on timesheet forms. The Time Code field can be configured in the Work Timecost Setup module. On the timesheet forms, it is editable on the *Additional Time* grid. The Time Code field in the *Linked Work* grid comes from the Work Order Employee Resource.

Dates/Hours

The dates that show up on the timesheet forms are based on the pay periods configured in Pay Period Management. Hours can be entered for each date in the *Additional Time* section of the timesheet forms. In the *Linked Work* section, time logged in the dates comes from the Work Order Resource End Date. The hours for each date are from the “Units - Grand Total” field on the Work Order Resource.

Timesheet forms may be configured to include one or more of the following fields:

Description

The description field is editable in the *Additional Time* section. It will be used for the task description when tasks are added in this section. The Description in the *Linked Work* section comes from the Work Order subtask.

Account/Project Numbers

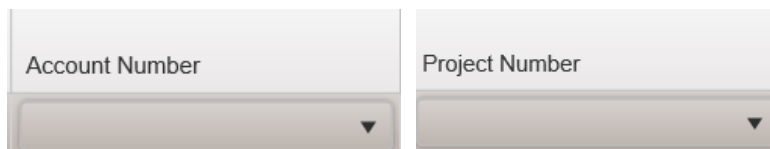
The Account Number and Project Number fields in the *Additional Time* section on the timesheet forms may be configured to allow free-form text or only pre-configured numbers. To require that timesheet users only use pre-configured Account Numbers and Project Numbers on their timesheet forms, do the following:

1. Set the “Force Use of Predefined Account Numbers” and/or “Force Use of Predefined Account Project Numbers” Work Options to True:

Force Use of Predefined Account Numbers

Force Use of Predefined Account Project Numbers

2. Set up one or more Account Numbers or Project Numbers in the Work Flow Setup Account Numbers module or Work Flow Setup Project Numbers module. Only those numbers that are marked as Active will display on the Timesheet form.
3. The user will now be allowed to select from a pre-defined list on the timesheet form.



The image shows two side-by-side dropdown menus. The left menu is labeled 'Account Number' and the right menu is labeled 'Project Number'. Both menus have a downward-pointing arrow at the bottom right corner, indicating they are dropdown lists.

The Account Number and Project Number fields in the *Linked Work* section come from the “Res Account #” and “Res Proj No - Acct” fields on the Work Order Employee resource.

Tasks

There is a field called “Tasks” that can be added to the timesheet forms. It will be editable from the *Additional Time* section. The tasks that are available for selection come from the Work Task Setup module. Only those tasks that are marked as Active = True and “Timesheet Enable” = True will appear.

Work Order

The Work Order field is another field that can be added to timesheet forms. It will display the Work Order # associated with the tasks in the *Linked Work* section.

Report Configuration

There are two System Settings which affect the display of timesheet reports. These system settings can be configured by your Lucy administrator.

1. The default timesheet report generated from timesheet forms or Timesheet Overview can be changed in the System Setting called “Name of the RPT file to use as the default timesheet report” located on the web application under System Settings > Work.

Setting	Function
Name of the RPT file to use as the default timesheet report	Indicates the path and name of the RPT file that will be used as the default timesheet report for all users. The system path will automatically look in the root of the Lucy Web install. Example: Reports\Work\WebTimesheetBasic1WeekWeb.rpt

The report file name can be changed one of the following four standard timesheet reports:

- **WebTimesheetBasic1WeekWeb.rpt** - shows 1 week of tasks and their totals; displays the Task field
 - **WebTimesheetBasic2WeekWeb.rpt** - shows 2 weeks of tasks and their totals; displays the Task field
 - **WebTimesheetAll1WeekWeb.rpt** - shows 1 week of tasks and their totals; displays the Task, Class, Account #, Project #, and Time Code fields.
 - **WebTimesheetAll2WeekWeb.rpt** - shows 2 weeks of tasks and their totals; displays the Task, Class, Account #, Project #, and Time Code fields.
2. The second System Setting affects the report subtitles. It is called “Suppress Subtitles On View Reports” located under System Settings > Reporting. When set to True, the system setting will no longer prompt the user for a timesheet report subtitle.

Setting	Function
Suppress Subtitles On View Reports	Disables all subtitle prompts on reports run from views and timesheets.

Employee Configuration

Timesheet Users

All users of the timesheet system except users set up as Payroll Administrators need to be set up as an active user in the Work Flow Employee Setup module. This will also enable those employees to be selected as Work Order resources so that their Work Order hours appear in the timesheet system.

To set up the user in the Employee Setup module:

1. Open the **Work > Administration > Work Flow Setup > Employee Setup** module.
2. Find or create the user's Employee record.
3. On the Employee record, enter the user's Lucity Login ID (from the Security program) in the Login ID field.
4. Check the Active checkbox.

Supervisors/Employee Hierarchy

An employee configured as a supervisor and granted the Timesheet permission of "Allowed to Approve Timesheets" will be able to approve timesheets of the employees/supervisors that report to him/her as well as the employees of any supervisors that report to him/her. To set up the Supervisor/Employee hierarchy, do the following:

1. Open the **Work > Administration > Work Flow Setup > Employee Setup** module.
2. To mark an employee as a supervisor, find the supervisor's Employee record and mark the Supervisor checkbox on each record.
3. To assign an employee to report to a specific supervisor, go through all Employee records of the supervisor and use the Supervisor picklist field to select the supervisor.

Note: *Supervisors may be assigned to report to other Supervisors.*

Payroll Administrators

Users who have been granted the Timesheet permission of "Allowed to Approve and Lock Timesheets" are labeled in the Timesheet system as Payroll Administrators. By default, Payroll Administrators will be able to approve and lock the timesheets of all users in the timesheet system using Timesheet Overview. You may wish to limit Payroll Administrators to approve and lock timesheets of employees in certain departments only. To limit their access to only certain departments, a Timesheet Administrator can utilize the Payroll Admin User Interface. See the "Payroll Admin Management" section above for detailed instructions.

You may wish for certain users such as payroll clerks with the "Allowed to Approve and Lock Timesheets" to have access to Timesheet Overview without being a Work employee. This is possible by NOT setting them up in the Work Employee Setup module. Those users may still access Timesheet Overview and open timesheets but will not be able to open Pay Period Management.

Configuring Security

Permissions

Timesheets

There are several security permissions that are unique to the timesheet system. A timesheet user may be granted one or more of the following permissions:

- Work >> Timesheets - Run - Enables a user to have read-only access to Timesheets
- Work >> Timesheets - Edit Own Record - enables a user to add/edit/delete tasks on their own timesheet forms but not on other user's timesheets
- Work >> Timesheets - General - Edit - enables a user to add/edit/delete his/her own tasks on timesheet forms. Also enables the user to alter other user's timesheets when opened from within Timesheet Overview.
- Work >> Timesheets - Allowed to Edit Pay Periods - enables a user to configure pay periods. The user also needs to be set up in Work Employee Setup in order to access Pay Period Management.
- Work >> Timesheets - Allowed to Create and Assign Timesheets - enables a user to create timesheet forms and assign them to user security groups.
- Work >> Timesheets - Allowed to Approve Timesheets - enables a user configured as a supervisor to approve timesheets of the employees and supervisors who report to him/her as well as the employees of the supervisors that report to him/her.
- Work >> Timesheets - Allowed to Approve and Lock Timesheets - enables a user to approve and lock the timesheets of all employees and supervisors unless the user is limited to only certain departments.

Note: *Timesheet forms also need to be assigned to security groups in order for users to access them.*

Other Modules

A timesheet user may need one or more of the following permissions that are not unique to timesheets but that affect timesheet functions:

- Lucity Apps >> Lucity Web - Run - enables a user to log into the web app where the Timesheet system resides.
- Work >> Work Orders - Run - enables a user to view the Work Order from the *Linked Work* grid.
- Work >> Work Orders - Edit Own Record - enables a user to edit only the Work Orders that they created.
- Work >> Work Orders - General - Edit - enables a user to edit Work Orders created by any users.
- Work >> Work Orders - General - Add - enables a user to add a Work Order with tasks and employee resource hours so they show in the *Linked Work* grid.

Note: *The timesheet user must be in a security group that has been assigned to a Work Order view in order to open Work Orders from within Timesheets.*

- Admin >> Lucity App Admin - Run - enables a user to execute the Payroll Admin User Interface to assign departments to users set up as Payroll Administrators. Also enables a user to edit applicable system settings for timesheets.

- Admin >> Security Admin >> Run - enables a user to access the Security program to create users and assign permissions.
- Work >> Work Employee Setup - General - Run - enables a user to open the Work Employee Setup module.
- Work >> Work Employee Setup - General - Add - enables a user to add an employee record to the Work Employee Setup module.
- Work >> Work Employee Setup - General - Edit - enables a user to edit an existing employee record in the Work Employee Setup module.

Note: The user must be in a security group assigned to the Work Employee Setup default view in order to open it from the web menu.

- Lucity Apps >> Lucity Web - View Modules List - enables a user to access the web menu to open the Work Employee Setup module.
- Work >> Work Options - Run and General - Edit - enables a user to open and configure Work Options.

There may be some security permissions needed by other modules and functions mentioned throughout this manual that aren't listed here. For more information about those modules and their available security permissions, the Lucity Help Portal, <http://help.lucity.com>, is a helpful resource. It contains information about all Lucity modules as well as the security needed in them.

Timesheet Security Groups

Each different type of timesheet user can be configured to use a separate security group with different permissions.

Example Security Configuration

Here is one example of a configuration of security groups for your timesheet users but these groups are customizable for each agency:

Timesheet Users: For timesheet users who will create tasks and log their time using timesheet forms and Work Orders.

Suggested permissions:

Timesheets - Run, Edit Own Record
 Work Orders - Run, Edit Own Record, General - Add
 Lucity Web - Run

Timesheet Supervisors: For those timesheet users who are supervisors and will approve the timesheets of their employees, supervisors reporting to them, and/or employees of those supervisors. Also optional would be the ability to edit the employees' timesheets and Work Orders.

Suggested permissions:

Timesheets - Run, Edit Own Record or General - Edit, Allowed to Approve Timesheets
 Work Orders - Run, General - Edit, General - Add
 Lucity Web - Run

Timesheet Administrators: For those timesheet users who will serve as the Timesheet Administrator by creating and assigning timesheet security groups, creating and assigning timesheet forms, configuring pay periods for payroll, assigning departments to payroll administrators, configuring Work Options, and configuring users in Work Employee Setup.

Suggested permissions:

Lucity App Admin - Run

Security Admin - Run

Timesheets - Allowed to Create and Assign Timesheets, Allowed to Edit Pay Periods, Run

Work Employee Setup - General - Add, General - Edit, Run

Lucity Web - View Modules List

Work Options - Run, General - Edit

Lucity Web - Run

Payroll Administrators: For those users who will serve as the Payroll Administrator. Can view, approve, and lock timesheets before they are submitted to payroll. Optional would be the permission to configure pay periods for payroll.

Suggested permissions:

Timesheets - Allowed to Approve and Lock Timesheets, Allowed to Edit Pay Periods (would also need to be set up as an employee in Work Employee Setup), Run

Work Orders - Run

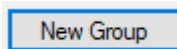
Lucity Web - Run

Creating and Assigning Security Groups

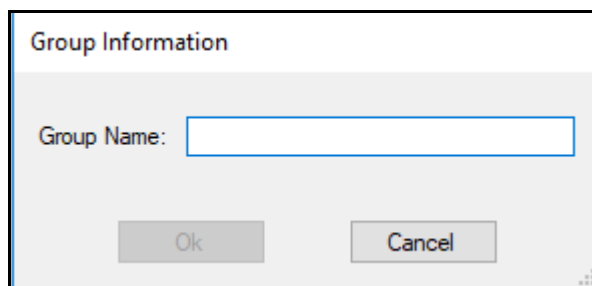
To create security groups and assign one or more users to them, do the following:

1. Within the Security program go to Security > Users/Groups Setup. This will open the User and Group Assignments dialog.
2. To create a security group, do the following:

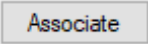
- a. On the right, click the New Group button:



- b. Give the Group a unique name:

A dialog box titled "Group Information" with a light gray background. It contains a label "Group Name:" followed by a text input field. At the bottom, there are two buttons: "Ok" and "Cancel".

- c. Click **OK**.

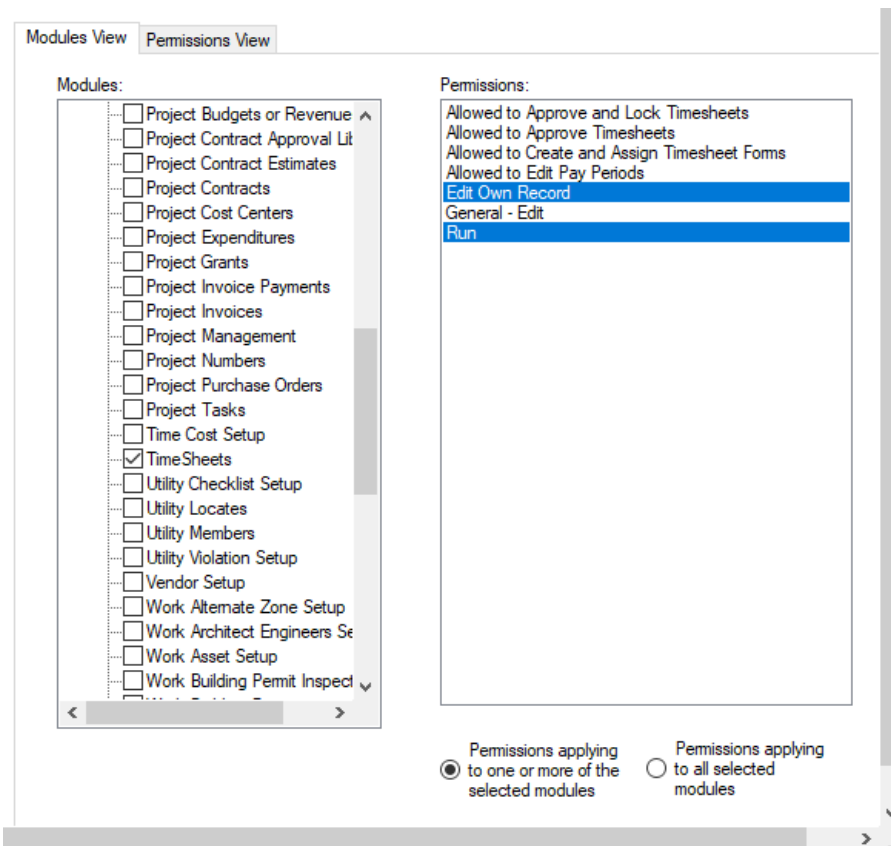
3. To assign a user to a security group, do the following:
 - a. On the left, click on the user(s) who will be assigned to the security group.
 - b. On the right, click on the security group(s) that will be assigned to the selected user(s).
 - c. Click the Associate button  in the middle of the users and groups. The selected user(s) will then be associated to the selected group(s).

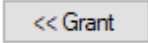
Assigning Permissions

To assign permissions to a security group, do the following:

1. Within the Security program go to Security > Permissions Setup. This will open the Permissions Assignments dialog.
2. On the left side, select the group you wish to configure.
3. On the right side, check the desired module(s).
4. Select one or more of the Permissions within that module that you would like to include in the selected security group.

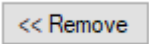
Here are the timesheet permissions for the **Timesheet User** group in our example security configuration:



5. Click the Grant button  in the middle of the screen.
6. Repeat these steps for every permission needed in the timesheet security groups.


Removing Permissions

To remove a permission from a security group, do the following:

1. Within the Security program go to Security > Permissions Setup. This will open the Permissions Assignments dialog.
2. On the left side, select the group from which you wish to remove the permission.
3. On the right side, check the desired module and permission within that module that you would like to remove.
4. Click the “Remove” button: 
5. The permission will no longer be enabled in the security group.



Deny Permissions

To explicitly deny a permission from a security group, do the following:

1. Within the Security program go to Security > Permissions Setup. This will open the Permissions Assignments dialog.
2. On the left side, select the group from which you wish to deny the permission.
3. On the right side, check the desired module and permission within that module that you would like to deny .
4. Click the “Deny” button: 
5. The permission is now explicitly denied to that security group.

Viewing Permissions

To view the assigned permissions for a security group, do the following:

1. Within the Security program go to Security > Permissions Setup.
2. On the left side, select the group that you would like to view.
3. Expand the tree in the “Assigned Permissions” section to see the permissions associated with the security group. A key icon  in front of the permission means that it has been granted to the group. A lock icon  in front of the permission means it has been denied to the group.

Here are the permissions for the “TimesheetUsers” security group in our example security group:

Assigned Permissions:

