



TRAINING GUIDE

Timesheet Administration



Timesheet Administration

The Timesheet allows you to track the hours you work and edit hours worked by yourself and the employees you supervise. In addition, you can view hours entered in the Work Orders module, as well as open the desktop application directly to the related work orders. A sample of the Timesheet appears below. For additional information on the Timesheet features, check out the links at the bottom of the screen.

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Timesheet Display

The following features can be seen in the Timesheet display:

- The Timesheet forms display work hours for the set pay period. You can see all tasks worked on by the employee selected as well as the number of hours worked per task each day.
- You can add new tasks and hours, edit hours and task names, and save changes directly in the screen below.
- Tasks, hours, account numbers, and project numbers added through the *Work Orders* module will appear in the Timesheet display, but cannot be edited using the Timesheet.
- Timesheet tasks that are associated with Work Orders will display in the *Linked Work* grid. Click on the desktop or web icons to launch the related work order in the desktop application or web application.
- Hours added both through the Timesheet and *Work Orders* are totalled automatically by the system. The system displays these work hour totals in the *Summary* section of the timesheet display.

Note: Hours carried over from Work Orders are read only. You must be a Work Employee to use Timesheets. If a user is not a work employee but attempts to use the Timesheet, he or she will be able to access the screen, but any Timesheet records saved will not be accessible to the Timesheet Forms.

The screenshot shows the 'Lucy - Timesheet' interface for the pay period of 10/1/2012. It features three main data sections: Summary, Additional Time, and Linked Work, each with a table of daily hours and a total hours column.


Summary																	
Description	Time Code	Mon Oct 1	Tue Oct 2	Wed Oct 3	Thu Oct 4	Fri Oct 5	Sat Oct 6	Sun Oct 7	Mon Oct 8	Tue Oct 9	Wed Oct 10	Thu Oct 11	Fri Oct 12	Sat Oct 13	Sun Oct 14	Mon Oct 15	Total Hours
Daily Totals													3				3

Additional Time																	
Description	Time Code	Mon Oct 1	Tue Oct 2	Wed Oct 3	Thu Oct 4	Fri Oct 5	Sat Oct 6	Sun Oct 7	Mon Oct 8	Tue Oct 9	Wed Oct 10	Thu Oct 11	Fri Oct 12	Sat Oct 13	Sun Oct 14	Mon Oct 15	Total Hours
Project Management	REGULAR TIME	5	2.5	3.25													10.75


Linked Work																	
Description	Time Code	Mon Oct 1	Tue Oct 2	Wed Oct 3	Thu Oct 4	Fri Oct 5	Sat Oct 6	Sun Oct 7	Mon Oct 8	Tue Oct 9	Wed Oct 10	Thu Oct 11	Fri Oct 12	Sat Oct 13	Sun Oct 14	Mon Oct 15	Total Hours
Transferred Calls-Utilities	REGULAR TIME												3				3

Add/Edit/Delete a Task


You can add as many new work tasks as needed for each pay period in the Timesheet forms. To add a new work task and work 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 first blank field.
3. Use the drop-down list to select a Task.
4. Use the drop-down list to select a Time Code (regular time, overtime, etc.).
5. Enter the hours worked on the task in each of the daily hour fields.
6. For the Work Timesheet and Project Account Timesheets you can also enter the appropriate account numbers for each work task.


Note: Fields that have "Allow Data Entry" disabled in your Desktop application cannot be used in the Timesheet. For example, if the "Class Text" field is globally set to read only in the Desktop, that field cannot be written to in the Timesheet application.

7. Click  to save the record. This will recalculate the hour totals at the bottom of each daily column.


Note: Changes are automatically saved when you navigate away from the week currently displayed in the Timesheet form.

8. To make changes to your work tasks, click the Edit button .

9. If needed, click  to cancel your changes.

10. To remove a row, click the delete button .



Note: You cannot edit or delete the Totals at the bottom of the Timesheet forms or the hours carried over from Work Orders in your desktop version of Master Series. The pencil and trash can icons beside Work Order tasks will be inaccessible.

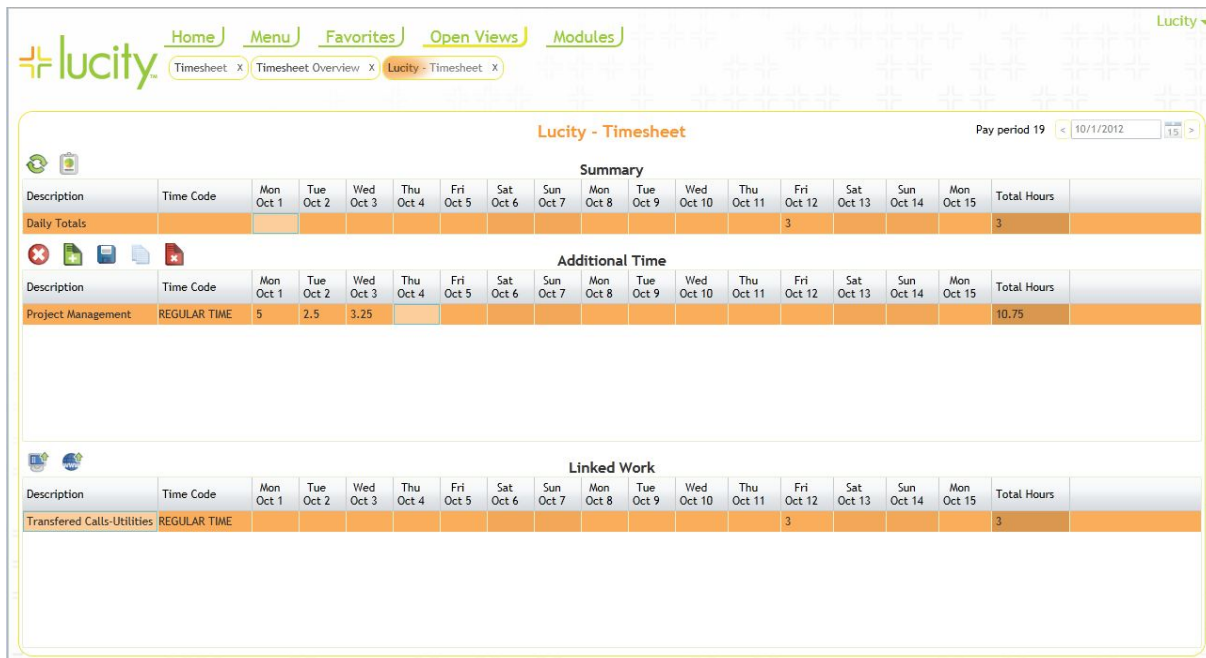
11. To copy a record from the previous pay period, click .

Note: This option will copy over all of the records from the previous pay period.

Notes: _____

12. Timesheet tasks that are associated with Work Orders will display in the *Linked Work* grid.

- Click on the desktop icon  to launch the related work order in the desktop application.
- Click the web icon  to launch the related work order in the web application.



The screenshot shows the 'Lucity - Timesheet' interface for pay period 19 ending 10/1/2012. It features three main data grids:

Summary																	
Description	Time Code	Mon Oct 1	Tue Oct 2	Wed Oct 3	Thu Oct 4	Fri Oct 5	Sat Oct 6	Sun Oct 7	Mon Oct 8	Tue Oct 9	Wed Oct 10	Thu Oct 11	Fri Oct 12	Sat Oct 13	Sun Oct 14	Mon Oct 15	Total Hours
Daily Totals													3				3

Additional Time																	
Description	Time Code	Mon Oct 1	Tue Oct 2	Wed Oct 3	Thu Oct 4	Fri Oct 5	Sat Oct 6	Sun Oct 7	Mon Oct 8	Tue Oct 9	Wed Oct 10	Thu Oct 11	Fri Oct 12	Sat Oct 13	Sun Oct 14	Mon Oct 15	Total Hours
Project Management	REGULAR TIME	5	2.5	3.25													10.75

Linked Work																	
Description	Time Code	Mon Oct 1	Tue Oct 2	Wed Oct 3	Thu Oct 4	Fri Oct 5	Sat Oct 6	Sun Oct 7	Mon Oct 8	Tue Oct 9	Wed Oct 10	Thu Oct 11	Fri Oct 12	Sat Oct 13	Sun Oct 14	Mon Oct 15	Total Hours
Transferred Calls-Utilities	REGULAR TIME												3				3

Timesheet Grid

The Timesheet is made up of three grids: Summary, Additional Time, and Linked Work.

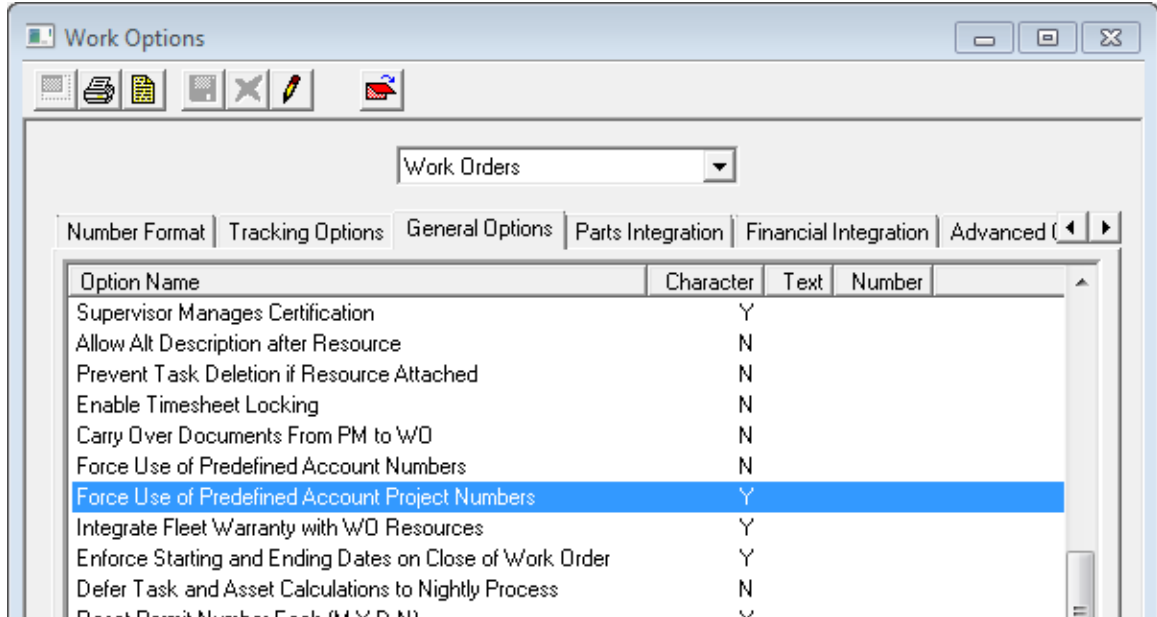
1. **Summary:** This grid is a view only grid that contains the sum of the hours in the Additional Time and Linked Work Grids.
2. **Additional Time:** This grid allows you to add/edit/delete additional work hours. You can also copy hours from the previous pay period in this grid.
3. **Linked Work:** This grid displays the hours from the linked work orders based on employee hours populated for each Subtask. Employee resources must have a Resource start and end date populated for the Linked Work record to display in the grid. You can view these records in the desktop or the web application by clicking on the corresponding icon.

Res Start Date	Res Start Time
1/3/2012	<input type="text"/>
Res End Date	Res End Time
1/3/2012	<input type="text"/>

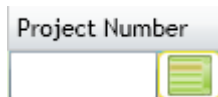
Project Number

To enter a Project Number in the timesheet:

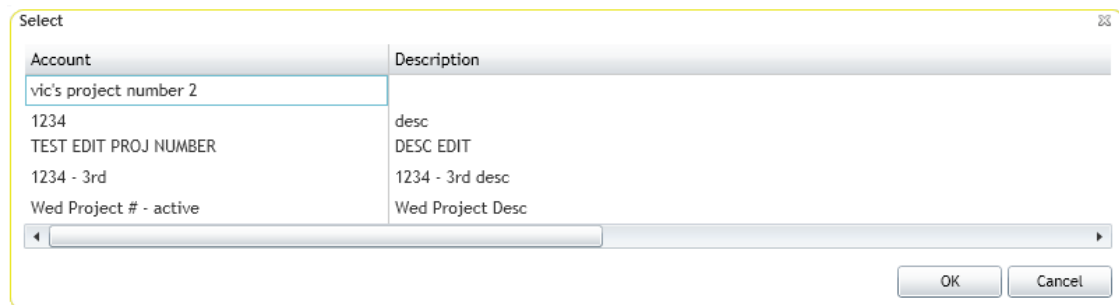
1. Must have Eden integration Option turned on in Work Options or have Work Option " Force Use of Predefined Account Project Numbers" = Y



2. Click in the Project Number field. The Project Number button will appear in the field.



3. Click on the Project Number button, a dialog will open up allowing you to choose the account number from a pick list.



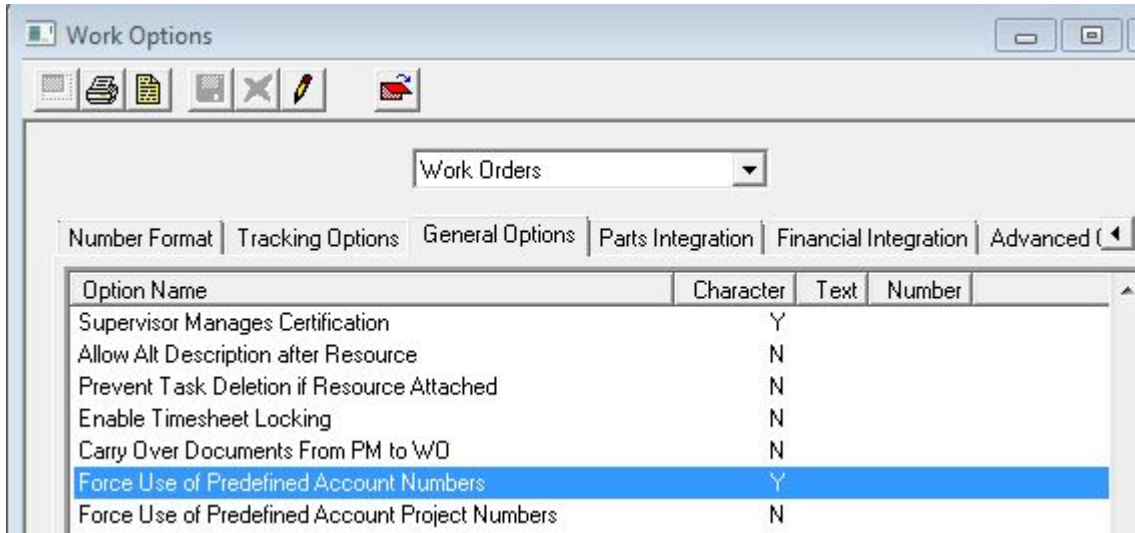
4. Choose the Project Number and click OK.

Note: To set up the Project Number pick list, in the Desktop application, go to Work>>Work Flow Setup>>Account Project Numbers.

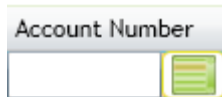
Account Number

To enter a Project Number in the timesheet:

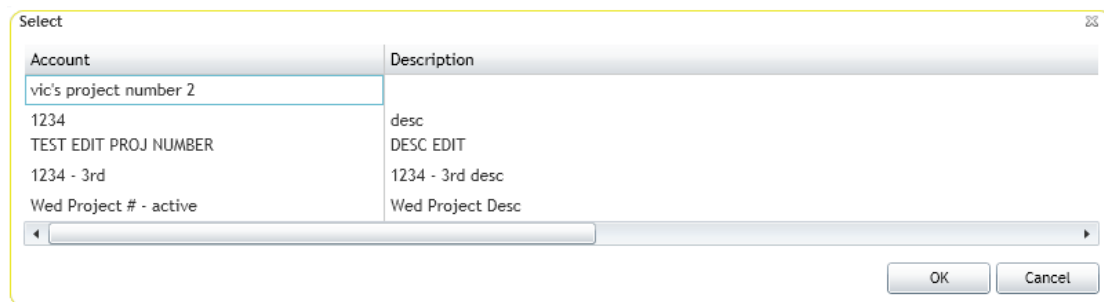
1. Must have Eden integration Option turned on in Work Options or have Work Option " Force Use of Predefined Account Numbers" = Y



2. Click in the Project Number field. The Project Number button will appear in the field.



3. Click on the Project Number button, a dialog will open up allowing you to choose the account number from a pick list.



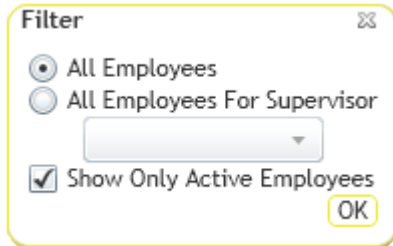
4. Choose the Account Number and click OK.

Note: To set up the Account Number pick list, in the Desktop application, go to Work>>Work Flow Setup>>Account Numbers.

Timesheet Overview

The timesheet overview allows supervisors and pay clerks to lock records, launch records in the web, filter, setup pay periods, and create reports.

- When you open the Timesheet Overview, you will first be asked to choose a filter.



- Choose the view you would like to see: All employees or All Employees for a specific Supervisor. The following window will appear:




Is Approved	Is Locked	Employee Code	Employee	Supervisor	Mon Oct 1	Tue Oct 2	Wed Oct 3	Thu Oct 4	Fri Oct 5	Sat Oct 6	Sun Oct 7	Mon Oct 8	Tue Oct 9	Wed Oct 10	Thu Oct 11	Fri Oct 12	Sat Oct 13	Sun Oct 14	Mon Oct 15	Total Hours	
<input type="checkbox"/>	<input type="checkbox"/>	991	LAKE MAINTENANCE SERVICE																		
<input type="checkbox"/>	<input type="checkbox"/>	135	LAMON WILSON	MIKE SLAYING																	
<input type="checkbox"/>	<input type="checkbox"/>	305	LARRY HANISHE																		
<input type="checkbox"/>	<input type="checkbox"/>	82	LARRY THOMAS	JOHN SMITH																	
<input type="checkbox"/>	<input type="checkbox"/>	485	Liberty In Inc																		
<input type="checkbox"/>	<input type="checkbox"/>	481	Lifting Hydraulics																		
<input type="checkbox"/>	<input type="checkbox"/>	615	LINKED FENCE SPEC																		
<input type="checkbox"/>	<input type="checkbox"/>	93	LOGAN DANIELS	NICK ROLAND																	
<input type="checkbox"/>	<input type="checkbox"/>	158	LOUIS GREAT III	NICK ROLAND																	
<input type="checkbox"/>	<input type="checkbox"/>	350	LOUIS QUELL																		
<input type="checkbox"/>	<input type="checkbox"/>	12345	Lucity													3					3
<input type="checkbox"/>	<input type="checkbox"/>	001656	LYNN THOMAS	MIKEY HANG																	
<input type="checkbox"/>	<input type="checkbox"/>	473	Maxco Auto Paint & Repair																		
<input type="checkbox"/>	<input type="checkbox"/>	364	MABLE HOLLAND																		
<input type="checkbox"/>	<input type="checkbox"/>	501	Mac Tools																		
<input type="checkbox"/>	<input type="checkbox"/>	413	Machine Performance LLC																		
<input type="checkbox"/>	<input type="checkbox"/>	170	MACINTYRE WOMACK	JOHN SMITH JR																	
<input type="checkbox"/>	<input type="checkbox"/>	519	Manny's Towing Co																		
<input type="checkbox"/>	<input type="checkbox"/>	001110	MARGARITA BOLL	EDWIN GENE																	
<input type="checkbox"/>	<input type="checkbox"/>	378	MARICO HERNANDEZ																		
<input type="checkbox"/>	<input type="checkbox"/>	85	MARIO VINCE	RYAN BROKE																	

Toggle Lock State

Supervisors and pay clerks have the ability to lock, approve and edit employee timesheets. This disables the employee's ability to add, edit, or delete timesheet records. Additionally, 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.

To lock timesheets, follow the steps below:

1. Select the record you want to lock.
2. Click the Toggle Lock State icon .
3. The *Is Approved* and *Is Locked* fields will be checked on or off.

Launch in Web



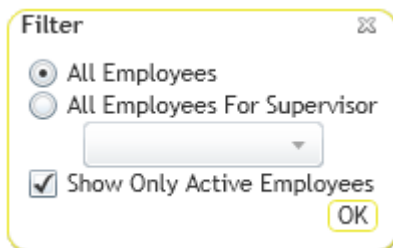
Within the Timesheet there are two locations where users have a Launch in Web icon.

- Timesheet - Within the timesheet there is a button above the Linked Work grid. This button will open the work order that is highlighted in that grid.
- Timesheet Admin - Within the timesheet admin this button appears in the toolbar over the grid of user's timesheets. This button opens up the timesheet for the user currently selected in the grid.

Change Filter

To change the filter you are viewing in the Timesheet Overview,

1. Click the Change Filter icon  and the following dialog will appear:



The image shows a dialog box titled "Filter" with a close button (X) in the top right corner. It contains two radio button options: "All Employees" (which is selected) and "All Employees For Supervisor". Below these options is a dropdown menu. At the bottom left, there is a checked checkbox labeled "Show Only Active Employees". At the bottom right, there is an "OK" button.

2. Choose the filter view you would like to see: All employees or All Employees for a specific Supervisor.
3. Click OK.


Notes: _____

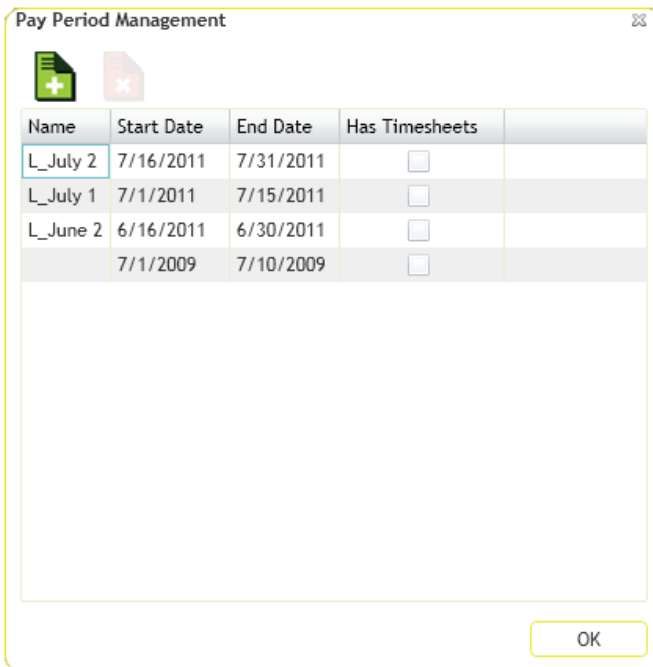
Pay Period Management

The Pay Period Management tool allows pay clerks to set up the pay periods for the year. Once setup, employees will see only the dates specified for each pay period.

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 would set up June to display June 1st through June 15th and June 16th through June 30th. However, in July you would 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.

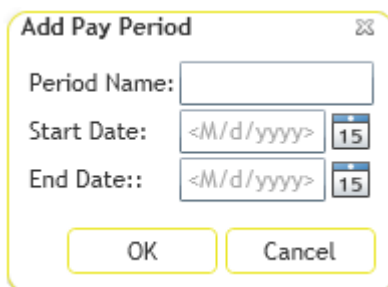
To set up a pay period:


1. Click the Pay Period Management Icon , the following dialog will appear:



Name	Start Date	End Date	Has Timesheets
L_July 2	7/16/2011	7/31/2011	<input type="checkbox"/>
L_July 1	7/1/2011	7/15/2011	<input type="checkbox"/>
L_June 2	6/16/2011	6/30/2011	<input type="checkbox"/>
	7/1/2009	7/10/2009	<input type="checkbox"/>


2. Click the Add icon , the following dialog will appear:

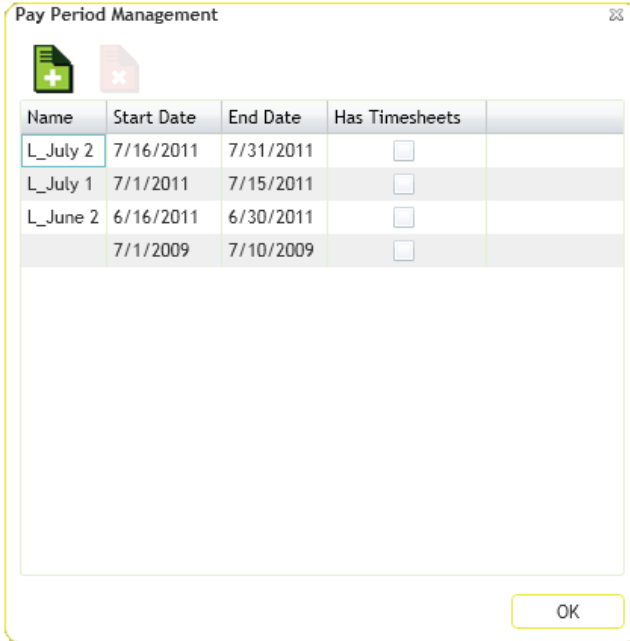


3. Give the pay period a name and use the calendar icons  to create Start and End Dates.
4. Click OK.

Add Pay Period

To add a Pay Period:

1. Click the Pay Period Management Icon , the following dialog will appear:

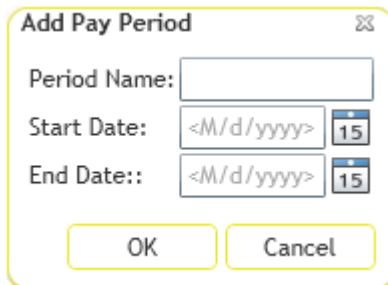


The dialog box titled "Pay Period Management" contains a table with the following data:



Name	Start Date	End Date	Has Timesheets
L_July 2	7/16/2011	7/31/2011	<input type="checkbox"/>
L_July 1	7/1/2011	7/15/2011	<input type="checkbox"/>
L_June 2	6/16/2011	6/30/2011	<input type="checkbox"/>
	7/1/2009	7/10/2009	<input type="checkbox"/>

An "OK" button is located at the bottom right of the dialog.


2. Click the Add icon , the following dialog will appear:



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

- Period Name:
- Start Date: 
- End Date: 


Buttons for "OK" and "Cancel" are located at the bottom.

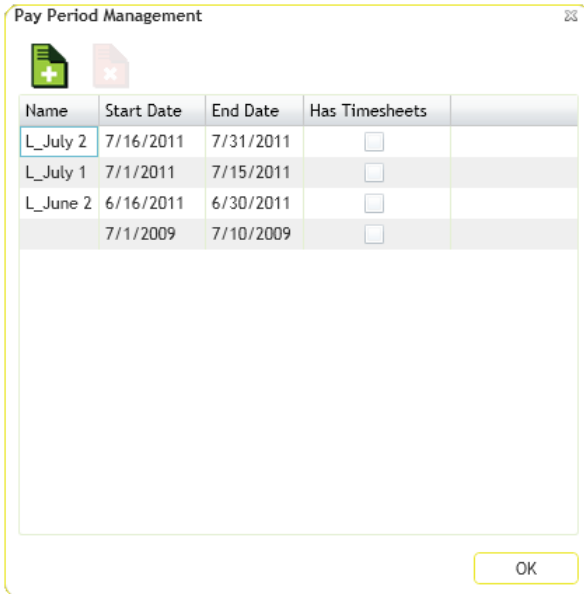
3. Give the pay period a name and use the calendar icons  to create Start and End Dates.
4. Click OK.

Notes: _____

Delete Pay Period

To Delete a Pay Period


1. Click the Pay Period Management Icon  , the following dialog will appear:

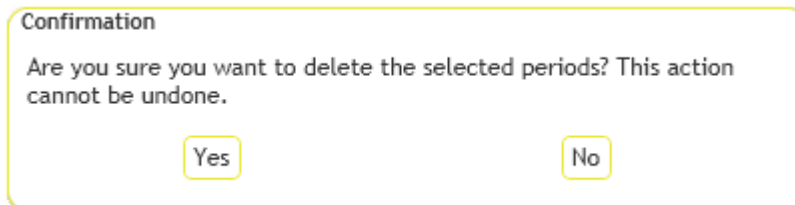


The dialog box titled "Pay Period Management" contains a table with the following data:

Name	Start Date	End Date	Has Timesheets	
L_July 2	7/16/2011	7/31/2011	<input type="checkbox"/>	
L_July 1	7/1/2011	7/15/2011	<input type="checkbox"/>	
L_June 2	6/16/2011	6/30/2011	<input type="checkbox"/>	
	7/1/2009	7/10/2009	<input type="checkbox"/>	

An "OK" button is located at the bottom right of the dialog box.

2. Select the pay period you want to delete.
3. Click the Delete pay period icon  , the following message will appear:



The confirmation dialog box contains the following text:

Confirmation
Are you sure you want to delete the selected periods? This action cannot be undone.


Buttons for "Yes" and "No" are located at the bottom of the dialog box.

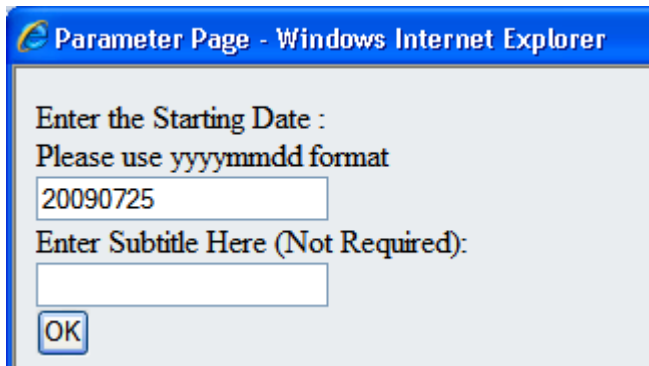
4. Click Yes.

Notes: _____

Run Report

A timesheet report can be run directly from the timesheet form. This report summarizes the daily hours by time code for the current employee. The report also totals the hours worked for the week displayed in the current timesheet. This tool uses the report specified in *Lucity Administration*>> *Settings*>> *Timesheet* tab>> Name of the RPT file to use as the default timesheet report. To change the default report used, select one of the timesheet reports found on the web server i.e. *C:\inetpub\wwwroot\LucityWeb\Reports\Work*

1. Click the Reports button  at the bottom of the timesheet display. A parameter page will appear:



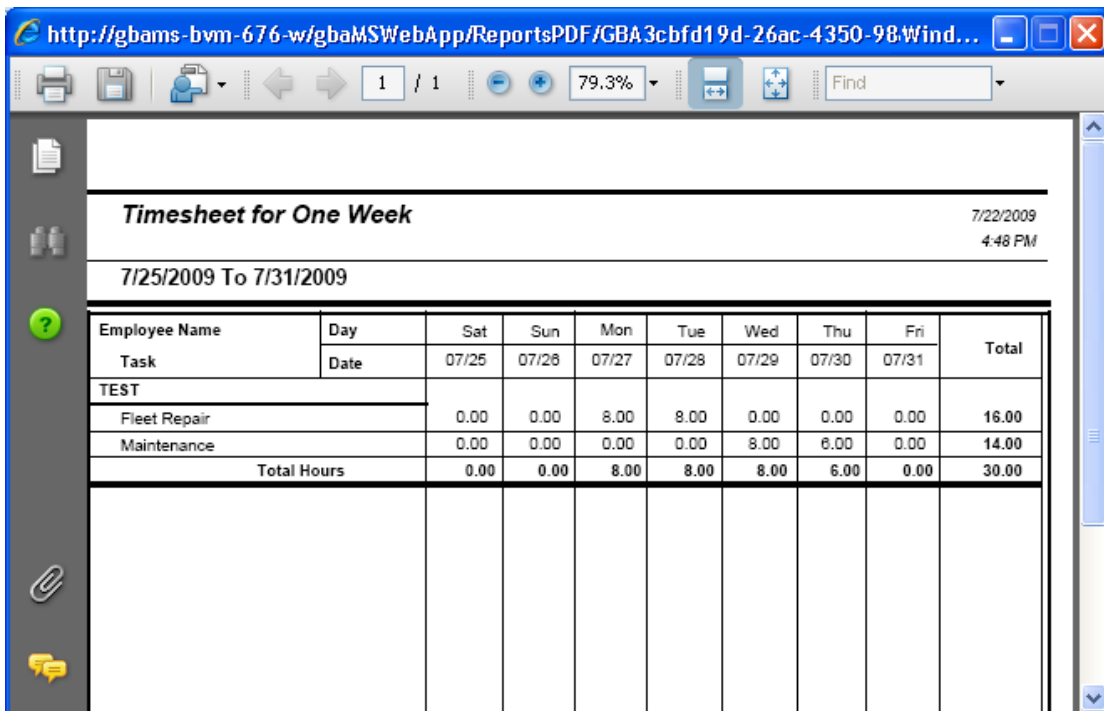
Parameter Page - Windows Internet Explorer

Enter the Starting Date :
Please use yyyyymmdd format
20090725

Enter Subtitle Here (Not Required):
[Empty field]

OK

2. Enter the starting date to be displayed in the report. Use yyyyymmdd format.
3. Enter a subtitle for the report if needed. This step is not required.
4. Click OK. The Timesheet report will appear similar to the example below:



http://gbams-bvm-676-w/gbaMSWebApp/ReportsPDF/GBA3cbfd19d-26ac-4350-98.Wind...

Timesheet for One Week 7/22/2009
4:48 PM

7/25/2009 To 7/31/2009

Employee Name	Day	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Total
Task	Date	07/25	07/26	07/27	07/28	07/29	07/30	07/31	
TEST									
Fleet Repair		0.00	0.00	8.00	8.00	0.00	0.00	0.00	16.00
Maintenance		0.00	0.00	0.00	0.00	8.00	6.00	0.00	14.00
Total Hours		0.00	0.00	8.00	8.00	8.00	6.00	0.00	30.00

Permissions

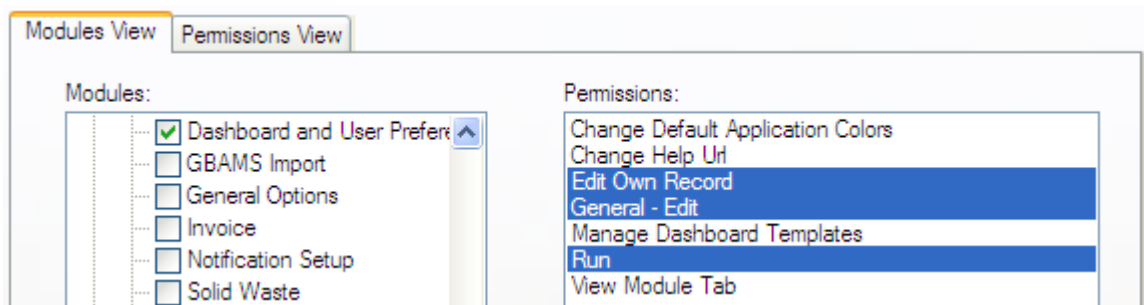
There are several security permissions that apply to the time sheet. To setup security for the timesheet go into the Lucy Security program.

Timesheet Groups

1. Within the Security program go to Security > Users/Groups Setup.
2. It is suggested that you create two new security groups. One for Timesheet users and one for Timesheet Admins.
3. Assign users to the two groups

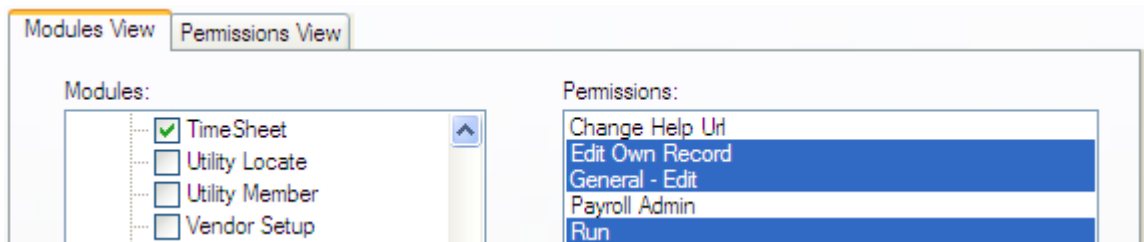
General Permissions

1. Within the Security program go to Security > Permissions Setup
2. On the left side select the Timesheet group, and the Timesheet Admin group
3. On the right side expand General and mark Dashboard and User Preferences
4. Select Edit Own Record, General - Edit, and Run.
5. Click << Grant in the middle of the screen



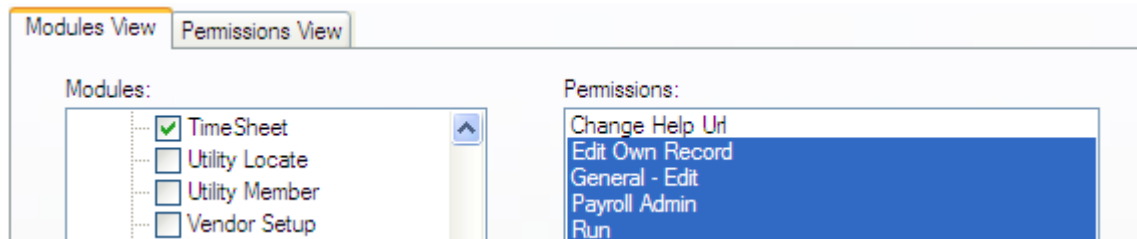
Timesheet Users

1. On the left side select the Timesheet group
2. On the right side expand Work and mark Timesheet
3. Select Edit Own Record, General - Edit, and Run.
4. Click << Grant in the middle of the screen




Timesheet Admins

1. On the left side select the Timesheet Admin group
2. On the right side expand **Work** and mark **Timesheet**
3. Select **Edit Own Record**, **General - Edit**, **Payroll Admin**, and **Run**.
4. Click << Grant in the middle of the screen



Assigning Timesheets

Timesheets like web Forms must be assigned to groups before the users in the group will be able to use them. This is done in the Lucity Administration Tool.

1. In the Lucity Administration Tool go to **Security > Assign Groups to Forms**.
2. In the middle check the **Show All Views/Forms** box.
3. In the right-hand column select a timesheet.
4. In the left hand column select a group.
5. Click the **Assign Groups** button.
6. The timesheet button  will now appear on the user's dashboard if they have permissions to use the timesheets.
 - o If the user has one timesheet assigned clicking the Timesheet button will open that timesheet.
 - o If they have more than one timesheet assigned clicking the button will display a dropdown list of timesheets to select from.

System > Settings

In the Lucity Administration tool under System > Settings there is a Timesheet tab that contains several global settings for the timesheet.

Setting	Function
Name of the RPT file to use as the default timesheet report	Indicate the path to 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 Lucity Web install.
Name of the timesheet that will have no required fields except timecode	Enter the timesheet form name that will have no required fields. This will disable all the require fields (except for timecode) on the form for all users.
The first day of the week shown on the TimeSheet forms	Indicate a day of the week (i.e. Saturday, Sunday, Monday, etc.) that will be the first day displayed on all Timesheet forms. This will apply to all users.