TimeWizard® 3.7

Supplementary Guide
for Administrators

TIMEWIZARD® 3.7

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Contents

CHAPTER 1

Introduction

TimeWizard version 3.7 offers both new features and enhancements. This guide supplements the *TimeWizard Administrator's Guide* to explain the changes in the Administrator application. Changes in the TimeWizard.*enterprise* application are explained in the *TimeWizard.enterprise User's Guide*.

In addition to the features described in the following chapters, users will find TimeWizard.*enterprise* easier to access and exit.

If you use TimeWizard.*enterprise* on a corporate intranet, you can allow your employees to access TimeWizard.*enterprise* without logging in to the application. Depending on a property setting, users who log on to the intranet with a valid user ID are also recognized as valid TimeWizard users. When these intranet users enter the TimeWizard address in their browsers, their employee home pages will display. For further information on this property setting, consult the *TimeWizard Installation Guide*.

If your employees use Microsoft's Internet Explorer browser with TimeWizard.*enterprise*, you can activate a safety feature with a TimeWizard property setting. TimeWizard.*enterprise* will then prompt employees to save any unsaved changes when they attempt to leave a timesheet. A warning message will display if they try to exit the timesheet or select another period, department, or employee before timesheet modifications have been saved. Users can also choose to leave the timesheet if they do not want to save their changes.

CHAPTER 2

Managing Employees' Employment Dates

TimeWizard prevents employees from entering time before their employment start dates and after their termination dates. By setting an active date and inactive date for an employee, you define the valid range of employment dates.

Any dates occurring before the designated "Active Date" that are in the same period as the active date will display read-only timesheet cells, which cannot be edited. Similarly, any dates occurring after the designated "Inactive Date" that are in the same period as the inactive date will display read-only timesheet cells. Other periods before and after the valid employment range do not display, regardless of the preference setting for "Periods Past" and "Periods Forward."

Objective

1. Setting an employee's active and inactive dates

Objective 1: Setting an employee's active and inactive dates

In addition to defining an employee's current status as "Active" or "Inactive," you can set a specific employee start or "Active Date" and termination or "Inactive Date" (Figure 2.1). Employees cannot enter time for dates before the active date or after the inactive date.

When you add a new employee to TimeWizard (Employees > Employee Detail), the default employee status is "Active" and the Active Date text box displays the current day's date. You may edit the active date or change the employee status to "Inactive." If you later change the employee's status from "Inactive" to "Active," the active date will automatically change to the current date. For further information on adding a new employee, refer to Chapter 11, "Working with Employees," in the version 3.6 *TimeWizard Administrator's Guide*.

You can define an active date without entering an inactive date, which may be added later. Whenever you change an employee's status to "Inactive," the inactive date will automatically change to the current day's date. You can also edit this date. While the employee status is "Inactive," the display for the active date is read-only and cannot be edited.

NOTE

Setting an inactive date does not automatically change the employee status from "Active" to "Inactive" after the specified date. You must change the status to "Inactive" separately. The specified inactive date may be an anticipated date. When an employee's status is defined as "Inactive," the employee and the employee's department owner cannot view any of the employee's timesheets.

To set an employee's active and inactive dates:

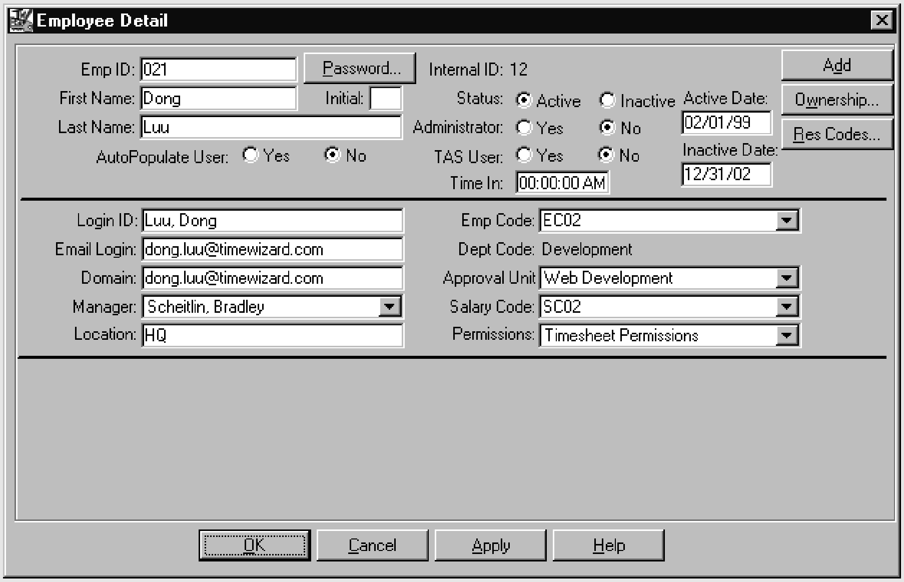


Figure 2.1

1. Click on the Employees icon  or select Tools > Employees from the TimeWizard main menu to open the Employees window.
2. Click on the employee row and click on the Edit Employee icon  (or double-click on the employee row) to open the Employee Detail dialog box for the selected employee.
3. To set the employee's active date while the employee's status is Active, enter the date in the Active Date text box.
4. To set the employee's inactive date, enter the date in the Inactive Date text box.
5. Click "Apply" to save the settings and remain in the dialog box or click "OK" to save the settings and exit the dialog box.

Example If you enter "04/03/01" in the Active Date box, and if the employee's status is "Active," the employee can enter time for April 3, but not for April 2 or earlier dates. If you enter "06/28/01" in the Inactive Date box, the employee can enter time for June 28, but not for June 29 or later dates. Even if the employee's status is "Active" and the employee's preference profile allows editing 12 periods forward, neither the employee or the employee's manager can add time for June 29 or later.

CHAPTER 3

Customizing the Assignments Display

The display feature enables you to customize how employee assignments appear on TimeWizard.*enterprise* timesheets. You can also display assignments differently for different employees or groups of employees.

For example, you may not want to display the Resource Code column for employees who use only unclassified assignments. You may want to head the second column "Client" for some employees and "Project" for other employees.

By creating a display profile, you can determine the following assignment display properties in the Time Reporting frame:

- Selection of columns to display
- Column headings
- Column display order (left to right)
- Column sort number (sorting priority)
- Column sort order (ascending or descending)

You can also rename the ETC/Bal column.

You are not required to make any display profiles. TimeWizard uses a default display profile if you do not create any. The default profile is determined by your Activities setup in the Custom Fields area. If you prefer, you can assign some employees to custom display profiles and let TimeWizard use the default profile for all other employees.

A timesheet user can also determine the assignment sorting criteria for the user's individual timesheet. Sorting criteria that is changed from a timesheet takes precedence over criteria set in the employee's display profile in the Administrator application.

For more information on setting up custom fields, see Chapter 3, "Defining TimeWizard Custom Fields," in the *TimeWizard Administrator's Guide*. To learn to sort assignments from a timesheet, see Chapter 5, Objective 4, "Sorting assignments on your timesheet," in the *TimeWizard.enterprise User's Guide*.

Objectives

1. Creating a display profile
2. Assigning members to a display profile
3. Editing a display profile
4. Deleting a display profile

Objective 1: Creating a display profile

To create a display profile, you define the profile and set its properties. Before creating profiles, consider how you will group employees for assignment to the profiles. Employees can be grouped by department, employee code, salary code, or custom lists of employees that you determine. After creating the profiles, continue with Objective 2 to assign members (i.e., employees) to the profiles.

To create a display profile:

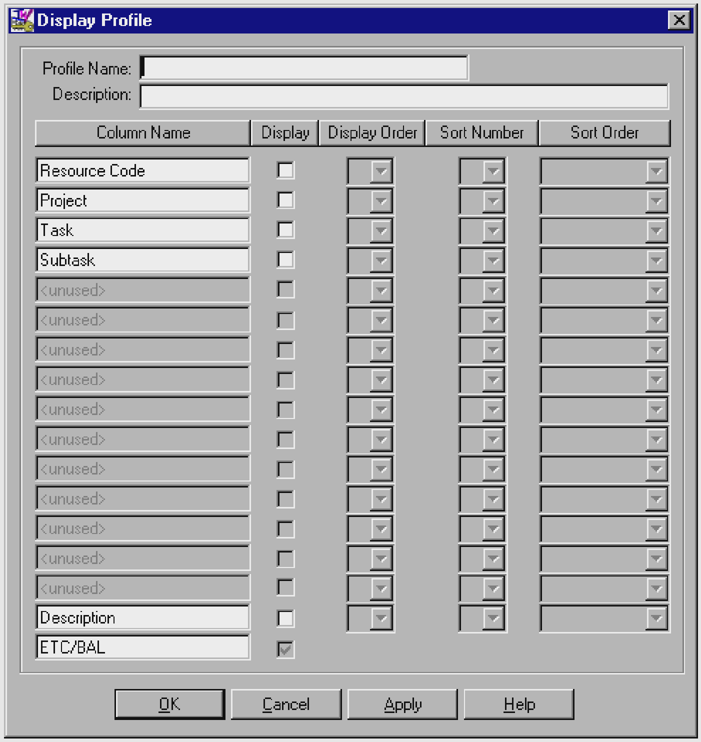


Figure 3.1

1. Click on the Display Settings icon  on the toolbar, or select Tools > Business Rules > Display from the main menu, to open the Display window (Figure 3.3).

2. Click on the Add Profile  icon on the toolbar or select Profile > Add Profile from the menu to open the Display Profile dialog box (Figure 3.1).

3. Type the profile name in the Profile Name box.

4. Type the profile description in the Description box.

5. Continue with the steps below to set the profile properties.

When you set the properties for a display profile, you can enter a new name for the ETC/Bal column, but you cannot hide it from the display or change its position in the Time Reporting frame.

To set display profile properties:

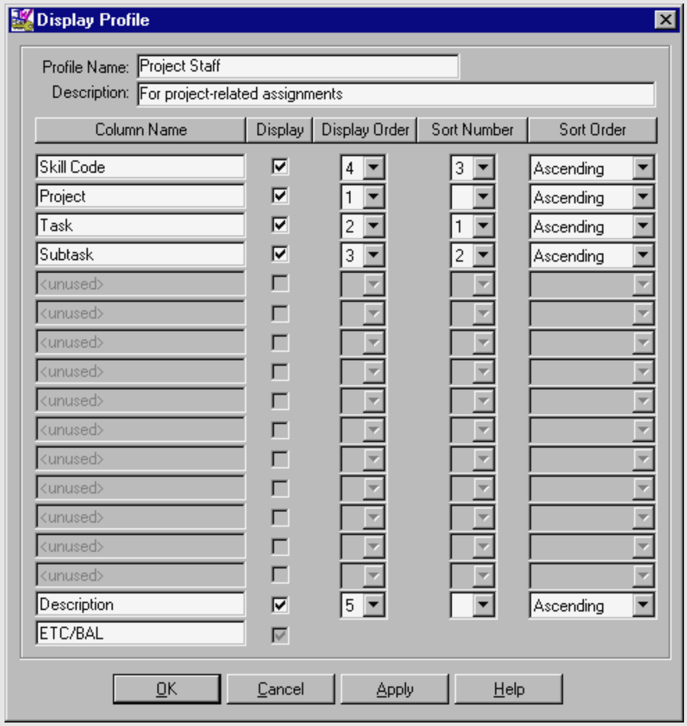


Figure 3.2

1. In the Display Profile dialog box (Figure 3.2), enter a new name in the Column Name box of each existing heading you want to rename.
2. Click in the Display check box of each existing column you want to display.
3. To select the order in which the checked columns display from left to right, click on their Display Order drop-down boxes and select position numbers.

   "1" indicates the first column on the left.
4. To change the sorting priority of the assignment rows, click on their Sort Number drop-down boxes and select priority rankings.

   Assignment rows are sorted first by the names in the column designated "1." Within the first grouping, rows are sorted by names in the column designated "2," and so on.
5. To change the sort order of the assignment rows to descending, click on their Sort Order drop-down boxes and select "Descending."

   "Ascending" (the default) sorts from the smallest number to the largest and from A to Z. "Descending" sorts from the largest number to the smallest and from Z to A.
6. Click on "Apply" to save the settings and remain in the dialog box, or click on "OK" to save the settings and close the dialog box.

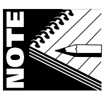
Objective 2: Assigning members to a display profile

Originally, all employees are assigned to the default display profile. You can assign some or all employees to custom display profiles, but an employee can be a member of only one profile at a time.

Before assigning members to profiles, you select one employee grouping method to be used for all display profiles. The possible grouping methods are as follows:

- Department
- Employee Code
- Salary Code
- Custom

The Custom grouping method enables you to select specific employees to assign to profiles, regardless of the employees' department, employee code, or salary code.



After employee assignments are made, changing the grouping method removes assignments from custom profiles and returns all employees to the default profile. You can change employee assignments or edit a display profile without changing the grouping method.

For more information about grouping methods, see Objective 1, "Understand Employee and Activity Grouping Methods," of the Introduction to Section Six in the *TimeWizard Administrator's Guide*.

In the Display window, you can select multiple members in the following ways:

To select members in sequence:

1. Click on the top member row you want to select.
2. Hold down the Shift key and click on the bottom row you want to select. All rows from the top row you click to the bottom row you click will be selected.

To select members not in sequence:

1. Click on one member row.
2. Hold down the Control key and click on an additional member row.
3. Continue to hold down the Control key and click on additional member rows as needed. Each row you click will be selected.

To assign members to a display profile:

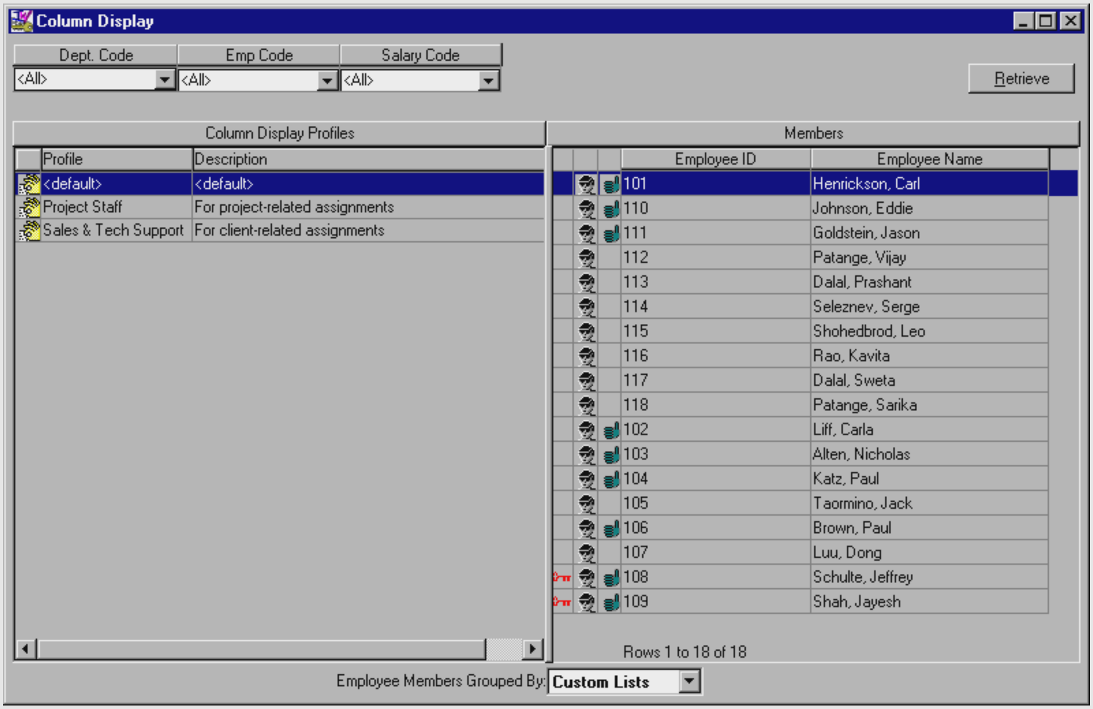


Figure 3.3

1. Click on the Display Settings icon  (Tools menu > Business Rules > Display) to open the Display window (Figure 3.3).
2. Click on the Employee Members Grouped By drop-down box at the bottom of the window and select a grouping method.
3. To limit which members will display, if desired, click on the Dept. Code, Emp. Code, or Salary Code drop-down boxes in the upper left and select a code. This optional selection does **not** need to match the selected grouping method.
4. Click on the Retrieve button in the upper right to display the profile names and the membership of the default profile.
5. With <default> highlighted in the Display Profile frame on the left, drag and drop each appropriate employee or group of employees from the Members frame on the right to the appropriate display profile on the left.
6. To view the membership of a profile, click on the profile name. Its members will display in the Members frame.
7. To change an assignment, click on the member's current profile. Drag and drop the member from the Members frame to the desired profile.

TIP

If the selected grouping method is Custom, you can sort the displayed Members list by employee name or employee ID by clicking on the corresponding heading.

Objective 3: Editing a display profile

When you change the display settings in a profile, you automatically change those settings for all of the employees assigned to the profile.

To edit a display profile:

1. Click on the Display Settings icon (Tools menu > Business Rules > Display) to open the Display window.
2. Click on the Retrieve button in the upper right to display the profile names.
3. Do one of the following to open the Display Profile dialog box for the profile you want to edit:
   - Select the profile and click on the Edit Profile icon on the toolbar.
   - Select the profile and select Edit Profile from the Profile menu.
   - Double-click on the profile name.
4. Modify the profile settings as desired.
5. Click “Apply” to save the settings and remain in the dialog box, or click “OK” to save the settings and close the dialog box.

Objective 4: Deleting a display profile

When you delete a display profile, its members return to the default display profile. You can delete any profile except the default profile.

To delete a display profile:

1. Click on the Display Settings icon  on the toolbar, or select Tools > Business Rules > Display from the main menu, to open the Display window.
2. Click on the Retrieve button in the upper right to display the profile names in the left frame.
3. Select the profile you want to delete and do one of the following:
   - Click on the Delete Profile icon.
     
   - Select Delete Profile from the Profile menu.
4. In the prompt window (Figure 3.4), click on “Yes” to delete or “No” to cancel the delete action.

Figure 3.4

CHAPTER 4

Working with the Calendar

The calendar feature enables you to have time entered automatically on employees' timesheets for holidays. You determine the activity, resource code, detail codes, and amount of time to be entered. You can choose different settings for different employees and for different holidays.

In contrast to TimeWizard AutoPopulate, the calendar feature does not require you to set data for an entire period. Also unlike AutoPopulate, the calendar feature does not require additional setup in timesheets.

You can also use the calendar feature to facilitate the use of timesheet rules. Your company may use a timesheet rule that requires a minimum number of hours on each submitted timesheet. The timesheet of an employee whose start or termination date falls in the middle of a period might not have the required hours. The calendar feature can adjust the timesheet rule hours proportionately when the rule is applied to the timesheet of such an employee.

To pre-populate timesheets with holiday data, you first create one or more calendar profiles containing the desired settings. Next you assign employees or groups of employees to the profiles. You then add a calendar interface in the Interface Controller.

From the Interface Controller, you can run the calendar process manually or schedule it to run automatically at specified intervals.

To use the calendar feature only for timesheet rules, you create one or more calendar profiles for "nonworking days." As the final step, you assign employees or groups of employees to these profiles. Unlike calendar profiles for holidays, profiles for nonworking days do not use the Interface Controller.

NOTE

If you want to use the calendar feature for both holidays and nonworking days, you must associate the holiday and nonworking day settings for a group of employees with the same calendar profile. Employees or groups of employees can be assigned to only one calendar profile at a time.

For information on using the Interface Controller, see "Introduction to the TimeWizard Interface Controller" in Section Seven of the *TimeWizard Administrator's Guide*, particularly Objective 3, "Navigate the Interface Controller window" and Objective 4, "Execute TimeWizard Interfaces." To run the interface at scheduled times, also see Objective 6, "Set up the Interface Interval."

Objectives

1. Creating a calendar profile
2. Setting up a calendar profile for holidays
3. Setting up a calendar profile for nonworking days
4. Assigning members to a calendar profile
5. Editing a calendar profile
6. Deleting a calendar profile

Objective 1: Creating a calendar profile

The first step in creating a profile for holidays or nonworking days is to save a name and description for the profile. If you will use the profile for holidays, you next select the activity, resource code, detail codes, dates, and the hours to apply to the dates. If you will use the profile for other nonworking days, you designate specific days of the week as nonworking days.

Before creating profiles, consider how you will group employees for assignment to the profiles. Employees can be grouped by department, employee code, salary code, or custom lists of employees that you determine. After creating the profiles and selecting settings, you will assign members (i.e., employees or groups of employees) to the profiles.

To create a calendar profile:

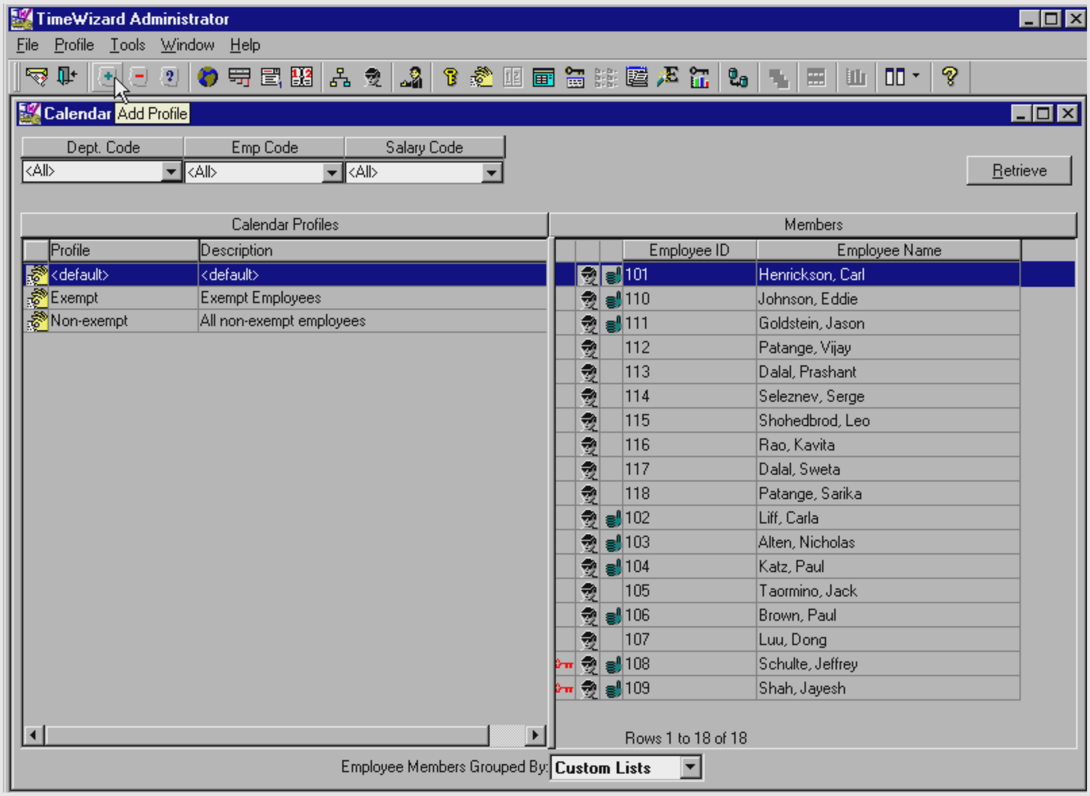
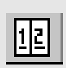


Figure 4.1

1. Click on the Calendar icon  on the tool-bar, or select Tools > Business Rules > Calendar from the main menu, to open the Calendar window (Figure 4.1).

2. Click on the Add Profile  icon on the tool-bar or select Profile > Add Profile from the menu to open the Calendar Profile dialog box Figure 4.2).

3. Type the profile name in the Profile Name box.

4. Type the profile description in the Description box.

5. Click "Apply" to save your entries. Follow the steps below to continue setting up the profile.

The Calendar Profile dialog box (Figure 4.2) gives you access to the Manage Holidays dialog box and the Manage Nonworking Days dialog box.

To access the management dialog boxes:

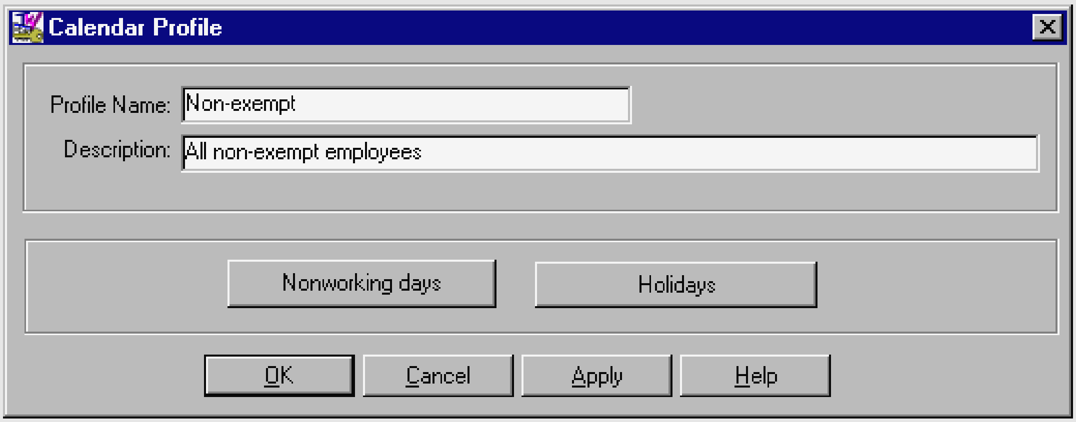


Figure 4.2

1. In the Calendar Profile dialog box (Calendar > Calendar Profile), do one of the following:
   - Click on the Holidays button to manage holidays
   - Click on the Nonworking days button to manage nonworking days for employees who start or end a job in mid-period
2. Continue with Objective 2 to set up a calendar profile for holidays or Objective 3 to set up a calendar profile for nonworking days.

Objective 2: Setting up a calendar profile for holidays

The Manage Holidays dialog box (Figure 4.3) enables you to view any existing settings for a calendar profile and gives you access to dialog boxes for completing the initial setup or editing an existing setup. Data displayed in the Manage Holidays dialog box cannot be modified from within the Manage Holidays box.

NOTE

An amount of hours set in a profile will not replace an amount of hours that was entered on a timesheet before the calendar process is run.

To access the Add Holidays dialog box:

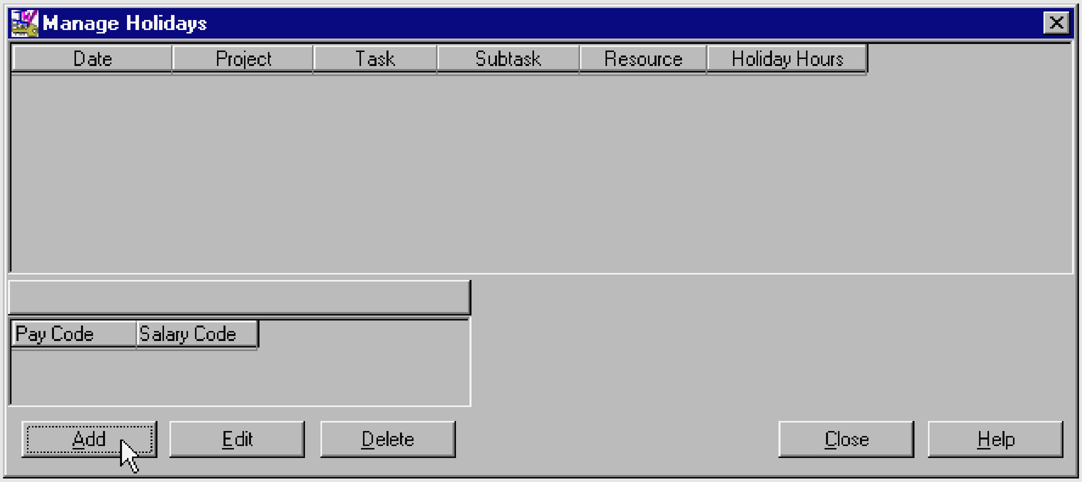


Figure 4.3

1. In the Manage Holidays dialog box (Calendar > Calendar Profile > Mange Holidays), if no holiday data displays, click on the Add button to open the Add Holidays window.

2. If data displays in the Manage Holidays dialog box, see Objective 5, "Editing a calendar profile."

If you want a profile to include multiple holidays, you can select different settings for each holiday in the Add Holidays dialog box (Figure 4.4). You can set different activities, resource codes, detail codes, and amounts of time. For the profile in Figure 4.4, four holiday hours have been set for December 24, 2002, and eight hours have been set for December 25 and other holidays.

NOTE

In the Add Holidays dialog box, after selecting an activity, hours, and a date, you must click on the Apply button before any of the following steps:

- Selecting a different activity for another date
- Selecting a different resource code for the same activity and another date
- Selecting a different detail code for the same activity and another date

NOTE

When you click on "Apply," the saved dates disappear from the Add Holidays dialog box and display in the Manage Holidays dialog box.

To set up holidays:

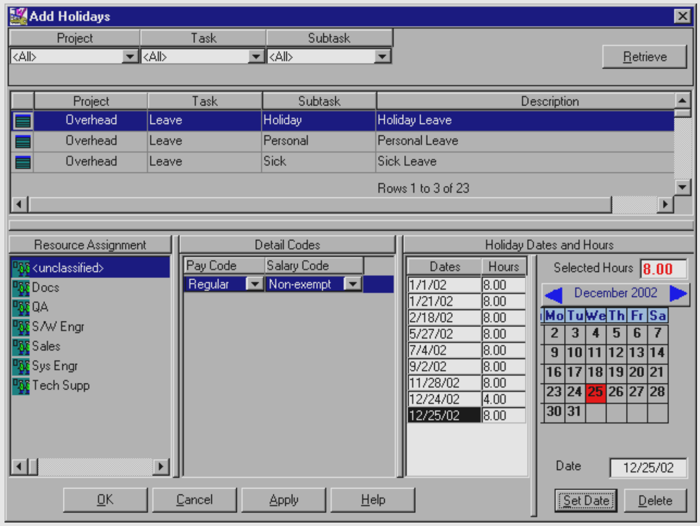


Figure 4.4

1. In the Add Holidays dialog box (Calendar > Calendar Profile > Manage Holidays > Add Holidays), click on "Retrieve" in the upper right to display all activities. Or, use the filter drop-down boxes in the top frame to narrow the list and then click on "Retrieve."
2. From the retrieved activity list, select an activity to include in the profile.
3. From the Resource Assignments frame in the lower left, select a resource code for the activity to form a resource assignment to include.
4. From each detail code drop-down box in the Detail Codes frame, select a code to include with the selected resource assignment.
5. In the Selected Hours box in the lower right, enter the amount of time for a holiday date for the selected assignment.
6. In the calendar in the lower right, locate the date for the selected hours and assignment. Click on the left arrow beside the month and year to display previous months; click on the right arrow to display following months.
7. Set the date by doing one of the following:
   - Double-click on the date in the calendar
   - Select the date and click on "Set Date" in the lower right
   - Enter the date in the Date box below the calendar and click on "Set Date"

   The selected date and hours display in the list to the left of the calendar.
8. To delete dates and hours, select the list row and click on "Delete" in the lower right.
9. To add other dates to the profile for the selected assignment, repeat steps 5 - 7.
10. To add other dates to the profile with another resource code, detail code, or activity, click "Apply" before repeating all needed steps.
11. Click "OK" to save the settings and close the box.

Objective 3: Setting up a calendar profile for nonworking days

If your company uses a timesheet rule to enforce the minimum number of hours on submitted timesheets, you may want to create and set up a calendar profile for "nonworking days." New employees who start work after the first business day of the period or employees who separate from the company before the last business day of the period might have less than the required number of hours on their timesheets. Calendar profiles for nonworking days are used so that their timesheets can be validated and submitted for approval.

In contrast to calendar profiles for holidays, profiles for nonworking days are not used to enter time on timesheets. Instead, TimeWizard calculates how much of the timesheet rule hours should be applied to an employee's timesheet. The calculation is based on the following three factors:

1. The number of hours stipulated by the timesheet rule for the employee's preference profile (Hours for the rule are set in Administrator > Tools menu > Business Rules > Define Timesheet Rules. The rule is assigned to the preference profile in Administrator > Preferences window > Preference Profile > Timesheet Rules.)
2. The employee's active or inactive date (set in Administrator > Employees > Employee Detail window)
3. The nonworking days set in the employee's calendar profile

Nonworking days are the days of the week when the employee does not usually work. If the employee's usual workweek is Monday through Friday, then Saturday and Sunday are the employee's nonworking days.

Using these factors, TimeWizard determines the proportion of the timesheet rule hours to apply to employees, or groups of employees, who are assigned to particular calendar profiles.

The Manage Nonworking Days dialog box

The Manage Nonworking Days dialog box (Figure 4.5) incorporates three functions in one window: completing an initial setup, viewing an existing setup, and editing an existing setup. If you have not created the calendar profile to be used for the nonworking days, see Objective 1: "Creating a calendar profile."

TIP

If you want to include most days of the week in the profile, you can add all days in one step and then remove the ones you want to exclude.

To manage nonworking days:

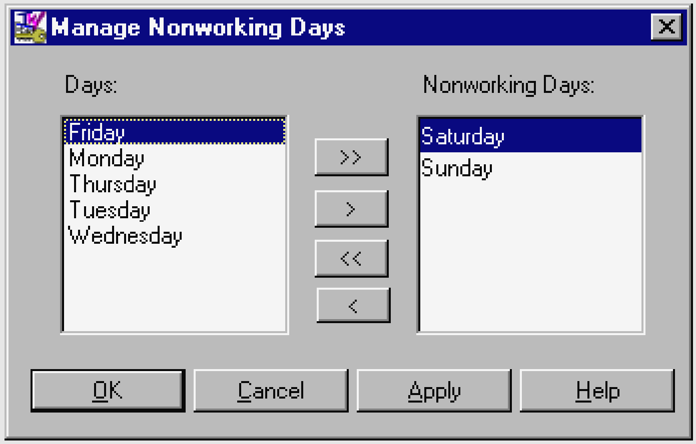


Figure 4.5

1. In the Calendar Profile dialog box for the selected profile (Calendar > Calendar Profile), click on the Nonworking days button to open the Manage Nonworking Days dialog box.
2. In the Nonworking Days box on the right, view any existing days currently set for the selected profile.
3. To add a day to the profile, select the day in the Days box on the left and click on the right arrow button between the boxes.

   The day moves to the Nonworking Days box on the right.
4. To move all days to the Nonworking Days box, click on the double right arrow button.
5. To remove a day from the profile, select the day in the Nonworking Days box and click on the left arrow button between the boxes.

   The day moves to the Days box on the left.
6. To remove all days from the Nonworking Days box, click on the double left arrow button.
7. Click on "Apply" to save the profile settings and remain in the dialog box, or click on "OK" to save the settings and close the dialog box.

Objective 4: Assigning members to a calendar profile

Originally, all employees are assigned to the default calendar profile. You can assign some or all employees to custom calendar profiles, but an employee can be a member of only one profile at a time.

Before assigning members to profiles, you select one employee grouping method to be used for all calendar profiles. The possible grouping methods are as follows:

- Department
- Employee Code
- Salary Code
- Custom

The Custom grouping method enables you to select specific employees to assign to profiles, regardless of the employees' department, employee code, or salary code.

NOTE

After member assignments are made, changing the grouping method removes assignments from custom profiles and returns all employees to the default profile. You can change member assignments or edit a calendar profile without changing the grouping method.

For more information about grouping methods, see Objective 1, "Understand Employee and Activity Grouping Methods," of the Introduction to Section Six in the *TimeWizard Administrator's Guide*.

In the Calendar window, you can select multiple members in the following ways:

To select members in sequence:

1. Click on the top member row you want to select.
2. Hold down the Shift key and click on the bottom row you want to select. All rows from the top row you click to the bottom row you click will be selected.

To select members not in sequence:

1. Click on one member row.
2. Hold down the Control key and click on an additional member row.
3. Continue to hold down the Control key and click on additional member rows as needed. Each row you click will be selected.

To assign members to a calendar profile:

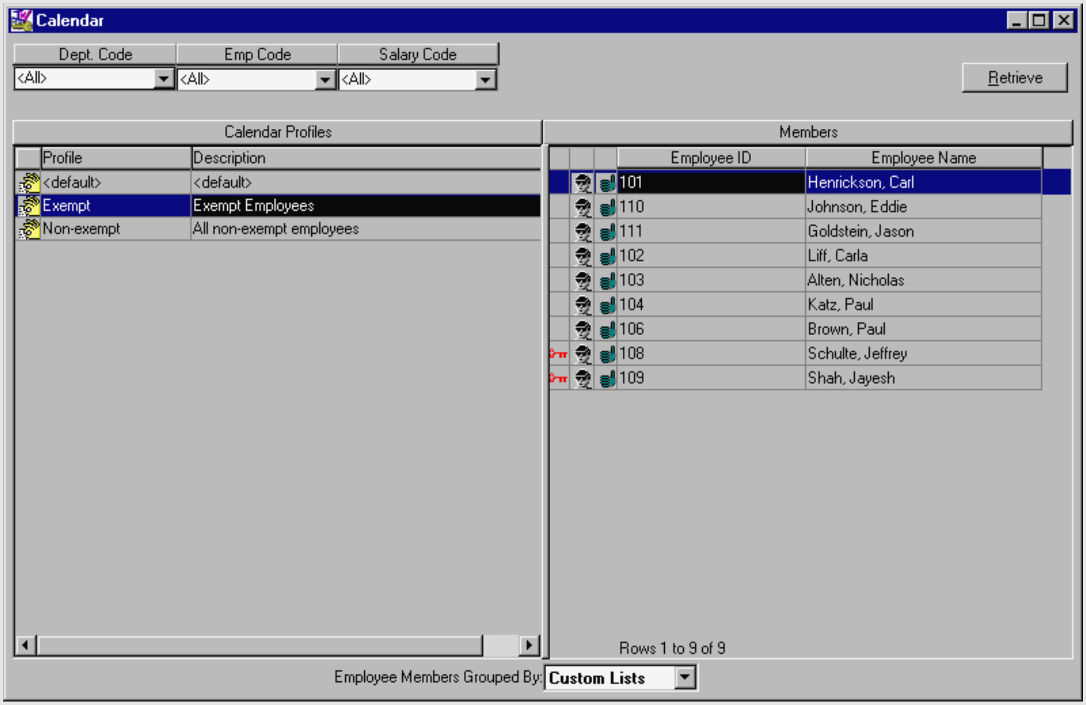


Figure 4.6

1. Click on the Calendar icon on the tool-bar, or select Tools > Business Rules > Calendar from the main menu, to open the Calendar window.
2. Click on the Employee Members Grouped By drop-down box at the bottom of the window and select a grouping method.
3. To limit which members will display, if desired, click on the Dept. Code, Emp. Code or Salary Code drop-down boxes in the upper left and select a code. This optional selection does **not** need to match the selected grouping method.
4. Click on the Retrieve button in the upper right to display the profile names and the membership of the default profile.
5. With <default> highlighted in the Calendar Profiles frame on the left, drag and drop each appropriate employee or group of employees from the Members frame on the right to the appropriate profile on the left.
6. To view the membership of a profile, click on the profile name. Its members will display in the Members frame.
7. To change an assignment, click on the member's current profile. Drag and drop the member from the Members frame to the desired profile.

TIP

If the selected grouping method is Custom, you can sort the displayed Members list by employee name or employee ID by clicking on the corresponding heading.

Objective 5: Editing a calendar profile

When you change the settings in a calendar profile, you automatically change those settings for all of the employees assigned to the profile.

To access a calendar profile for editing:

1. Click on the Calendar icon on the toolbar, or select Tools > Business Rules > Calendar from the main menu, to open the Calendar window.
2. Click on the Retrieve button in the upper right to display the profile names.
3. Do one of the following to open the Calendar Profile dialog box for the profile you want to edit:
   - Select the profile and click on the Edit Profile icon on the toolbar.
   - Select the profile and select Edit Profile from the Profile menu.
   - Double-click on the profile name.
4. To edit settings for nonworking days, continue with the steps in the box below.
5. To edit settings for holidays, continue with the steps in the second box below.

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To edit nonworking day settings:

1. Open the Calendar Profile dialog box for the selected profile, as described above.
2. Click on the Nonworking days button.
3. Edit the settings by following the steps in Objective 3: “Setting up a calendar profile for nonworking days,” as needed.
4. Click on “OK” to save the settings and close the dialog box.

To edit holiday settings:

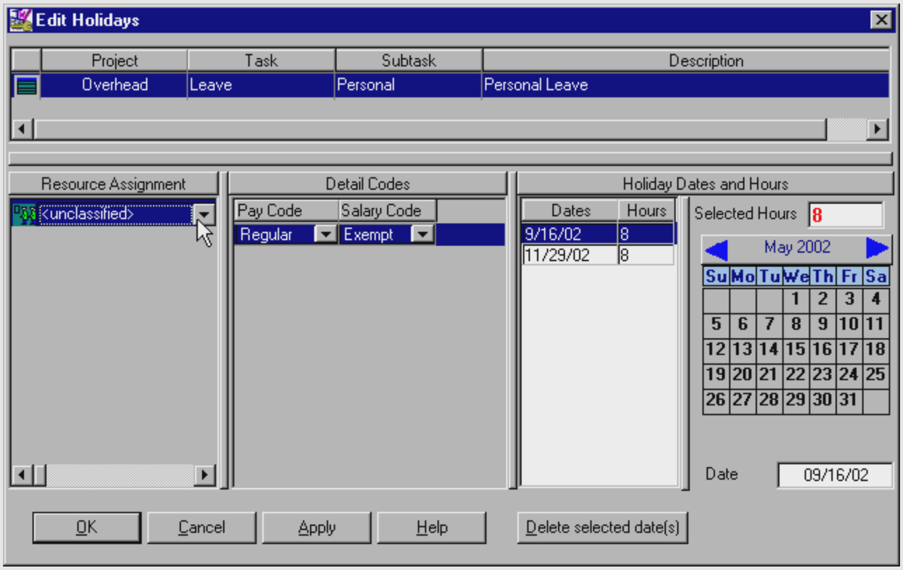


Figure 4.7

1. Open the Calendar Profile dialog box for the selected profile, as described above.
2. Click on the Holidays button to open the Manage Holidays dialog box (Figure 4.3).
3. To add another activity to the profile for an additional holiday date, click on the Add button to open the Add Holidays dialog box. Follow the steps in Objective 2 to set up holidays.
4. To delete a holiday row from the Manage Holidays box, select the row and click on the Delete button. Continue to modify the profile or click on "Close" to close the box.
5. To edit a holiday row, select the row and click on the Edit button to open the Edit Holiday dialog box (Figure 4.7).
6. In the Edit Holiday dialog box, to edit a date, select the date and hours row, select the desired date in the calendar (or enter it in the Date box), and click "Apply."
7. To edit hours, select the date and hours row, edit the hours in the Selected Hours box, and click "Apply." You can combine this step with step 6.
8. To delete one or more date and hours rows, select the rows and click on "Delete selected date(s)" below the date and hours rows.
9. To edit a resource code, select the date, click on the Resource Code drop-down box in the lower left frame, and select the desired code.
10. To edit a detail code, select the date, click on the detail code drop-down box in the Detail Codes frame, and select the desired code.
11. To edit resource or detail codes for multiple dates, multi-select the date and hours rows.
12. Click "Apply" to save the settings and remain in the dialog box, or click "OK" to save the settings and close the dialog box.

To edit an activity holiday setting, you must delete the activity's holiday row in the Manage Holidays dialog box and use the Add Holiday dialog box to make your new selection. You cannot edit an activity in the top frame of the Edit Holiday dialog box.

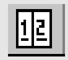
If you want to edit resource codes or detail codes for multiple dates, you can select multiple date and hours rows in the Edit Holiday dialog box and apply your changes to all the selected dates at one time. You can also delete multiple date and hours rows at one time. (See Objective 4: "Assigning members to a calendar profile" to learn to use multiple selection.)

While multiple date and hours rows are selected in the Edit Holiday dialog box, the calendar that displays in the lower right, the Selected Hours box above the calendar, and the Date box below the calendar are disabled.

Objective 6: Deleting a calendar profile

When you delete a calendar profile, its members return to the default calendar profile. You can delete any profile except the default profile.

To delete a calendar profile:

1. Click on the Calendar icon  on the toolbar, or select Tools > Business Rules > Calendar from the main menu, to open the Calendar window.
2. Click on the Retrieve button in the upper right to display the profile names in the left frame.
3. Select the profile you want to delete and do one of the following:
   - Click on the Delete Profile icon.

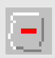
     
   - Select Delete Profile from the Profile menu.
4. In the prompt window (Figure 4.7), click on “Yes” to delete or “No” to cancel the delete action.

Figure 4.8

CHAPTER 5

Working with Submittal Notes in TimeWizard.*enterprise*

When timesheet users submit a timesheet for approval, they save a submittal note. Depending on a property setting, you may set TimeWizard.*enterprise* to display only the standard submittal note or to display a text box for composing an original submittal note, as well.

A timesheet user can choose not to leave a note by saving a blank original note.

You can view employees' submittal notes in the Approval History window in the same way you view other approval notes, whether you perform approvals in Administrator, the client/server timesheet, or TimeWizard.*enterprise*. If you use the Approvals Inbox of TimeWizard.*enterprise*, you can view submittal notes in the Approval History frame of the Inbox. (See Chapter 12, Objective 5, "Showing Approval History," in the *TimeWizard.enterprise User's Guide*.)

Employees can view their own submittal notes by using the View Approval History feature of the TimeWizard.*enterprise* timesheet.

If you want TimeWizard.*enterprise* to display only the standard submittal note, you need not take any action in the properties file. The default property setting displays the standard submittal note. To change the property setting to allow original submittal notes, refer to the *TimeWizard Installation Guide*.

CHAPTER 6

Setting Report Parameters in TimeWizard.*enterprise*

In the TimeWizard.*enterprise* Reports area, you define most parameters for TimeWizard standard reports by selecting the parameters from list boxes. Some list boxes allow you to select multiple values or items. For example, for the parameter "departments_owned," you can select all of the departments you own that you want to include in one report. (See Figure 4.1.)

To select multiple parameter values in sequence:

1. Click on the first parameter value in the sequence you want to select.
2. Hold down the Shift key and click on the last parameter value in the sequence you want to select.

To select multiple parameter values not in sequence:

1. Click on a parameter value you want to select.
2. Hold down the Control key and click on each additional parameter value you want to select.

NOTE

If a parameter box does not allow you to highlight more than one value or item at a time, the selected report does not process multiple values for that particular parameter.

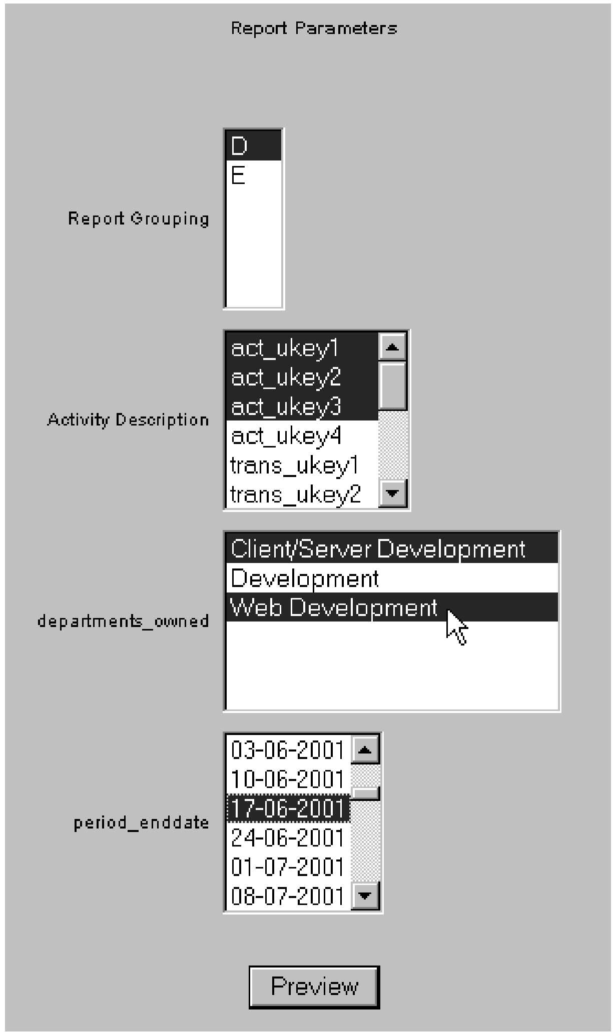

Report Parameters
Report Grouping
D
E
Activity Description
act_ukey1
act_ukey2
act_ukey3
act_ukey4
trans_ukey1
trans_ukey2
departments_owned
Client/Server Development
Development
Web Development
period_enddate
03-06-2001
10-06-2001
17-06-2001
24-06-2001
01-07-2001
08-07-2001
Preview

Figure 6.1

If a parameter box is labeled "From," type the starting date of the first period in the range you want to select. If a parameter box is labeled "To," type the ending date of the last period in your range. (See Figure 4.2.)

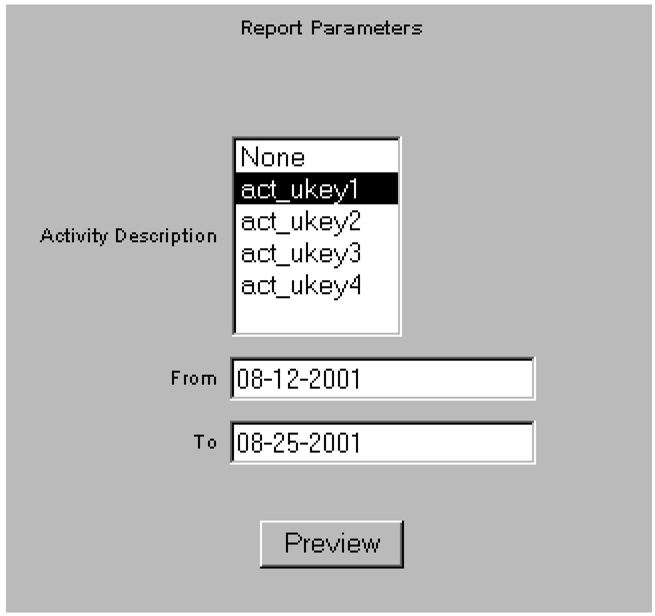


Figure 6.2

If the parameter box is labeled "Missing Timesheet Hours Threshold," you can use the default value of "1.00" (hour) or edit the value. A timesheet with less than the amount of hours in this box is considered to be "missing."

For further information on setting parameter values, see the *TimeWizard Guide to Reports*.

Filtering and Backing Up DataBridge Interfaces

The DataBridge feature enables you to create automated links to export data from TimeWizard into other systems within your organization, such as Human Resources and Accounting systems. To learn the fundamentals of setting up and running an interface, please see “Introduction to the TimeWizard Interface Controller” in Section 7 of the *TimeWizard Administrator’s Guide*. To learn to use the DataBridge feature, see Chapter 24, “Working with the DataBridge Toolkit,” in the *Administrator’s Guide*.

A DataBridge filter specifies your selection criteria for transactions records in an export. TimeWizard now gives you the option of applying your date criteria automatically to multiple DataBridge interfaces. This function is particularly useful when your filters are set to include transactions through a specified period ending date or transactions between two specified dates.

The DataBridge window also enables you to make a backup copy of your DataBridge setup specifications, including export variable definitions, filtering criteria, and an output target profile. If you change your DataBridge specifications, you can keep a copy of the specifications used on previous dates. You can also use a backup copy in case of power failure during the execution of a DataBridge interface or for troubleshooting purposes.

Objectives

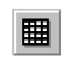
1. Applying filter dates to all DataBridges
2. Backing up DataBridge interface settings
3. Importing a DataBridge backup

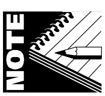
Objective 1: Applying filter dates to all DataBridges

If you have multiple DataBridge interfaces, you can set the date criteria for all the DataBridge filters simultaneously. This function will set the date criteria for both normal and historical transactions. Using this function will not set any other DataBridge filter criteria, such as criteria to include open or closed periods or approved or unapproved transaction data.

To use this function, first select the DataBridge interface containing the date criteria you want to use. Then select "Apply Filter Dates to All DataBridges" in the DataBridge Script Editor window for the selected interface (Figure 5.1).

You can open the DataBridge Script Editor from the Interface Controller in the following four ways:

1. Double-click on the DataBridge interface ID or application name you want to use.
2. Select the DataBridge interface row and select Setup Options from the main Interface menu.
3. Select the DataBridge interface row and click on the Setup Options icon  on the toolbar.
4. Select the DataBridge interface row, right-click on the ID or interface type, and select Setup Options from the popup menu.



When you use this function, the filter dates are applied only to the DataBridge interfaces currently residing in the Interface Controller. When you close the DataBridge Script Editor, this function is no longer selected. It will not apply to any DataBridge interfaces you add in the future unless you select the function again.

To apply filter dates to all DataBridges:

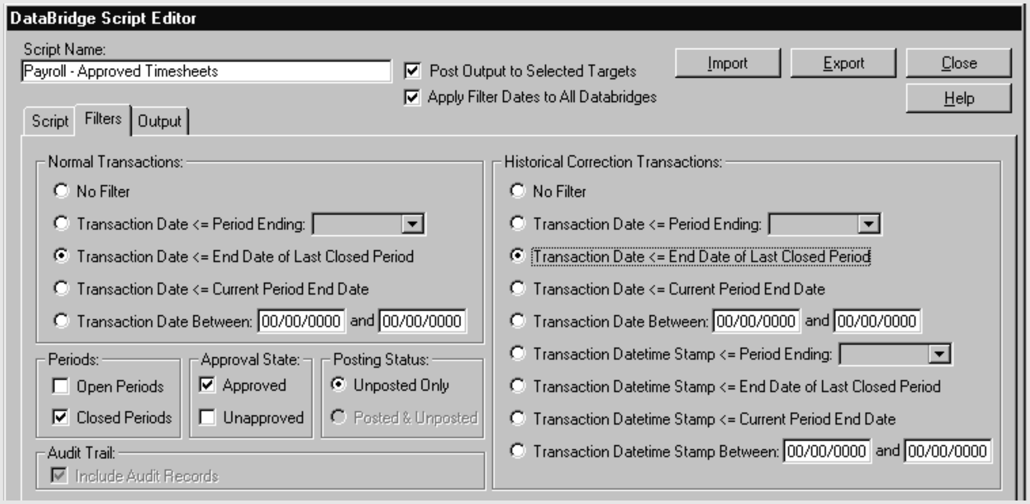


Figure 7.1

1. In the Interface Controller, select the DataBridge interface whose dates you want to use.
2. Open the DataBridge Script Editor as described above.
3. Click on the "Filters" tab to open the Filters tab page.
4. Confirm that the filter date criteria are correct for both normal and historical transactions or edit as needed.
5. Select "Apply Filter Dates to All DataBridges" in the upper part of the window.
6. Click "Close."

Objective 2: Backing up DataBridge interface settings

The export function

You can save a copy of your DataBridge interface settings by using the DataBridge export function. Unlike executing a DataBridge interface, this export function does not transmit transaction records to an external system. Instead, it saves only the DataBridge settings and stores them in text files within the TimeWizard directory. If you change your DataBridge settings, you can keep copies of settings you used on each specific date.

NOTE

You cannot use the export function when more than one DataBridge interface resides in the Interface Controller.

The export function saves DataBridge settings in six files, with the current date and time at the start of each file name. You can save DataBridge settings from different dates without overwriting the files.

The Defaults subdirectory

Before using the export function for the first time, you will need to make a subdirectory to store the exported files. Within the TWIAS subdirectory of your main TimeWizard directory, make a subdirectory named “Defaults” or “defaults.” Once the Defaults subdirectory has been created, you can export files to it many times.

To export DataBridge settings:

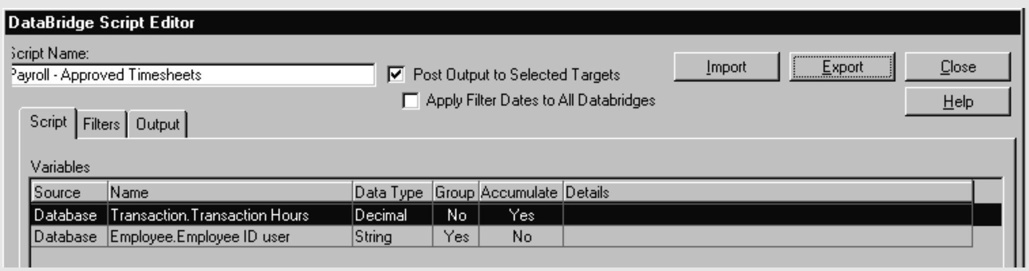


Figure 7.2

1. If you do not have a Defaults subdirectory, create one named "Defaults" or "defaults" in the TWIAS subdirectory.
2. In the Interface Controller, open the DataBridge Script Editor by double-clicking the DataBridge interface ID (or, with the row selected, select Setup Options from the Interface menu, click the Setup Options icon, or right-click the interface type or ID and select Setup Options from the popup menu).
3. Set up the interface script, filters, and output.
4. Click on the Export command button in the upper right of the window.

Objective 3: Importing a DataBridge backup

If you want to use previous settings that no longer appear in a DataBridge interface, you can enter settings from exported backup files by using the DataBridge import function. You may import settings to a specific DataBridge interface even when more than one DataBridge interface is in the Interface Controller.

NOTE

To import DataBridge settings, you must first remove the time and date from the names of the six files you want to use. The imported data overwrites existing settings in the selected DataBridge in the Interface Controller with the settings from the text files.

To import DataBridge settings:

1. In your TimeWizard file directory, open the Defaults subdirectory in the TWIAS subdirectory.
2. Delete the date and time from the names of the six files you want to import.
3. In the Interface Controller, select the DataBridge interface whose settings you want to replace.
4. Open the DataBridge Script Editor by double-clicking the DataBridge interface ID (or, with the row selected, select Setup Options from the Interface menu, click the Setup Options icon , or right-click the interface type and select Setup Options from the popup menu).
5. Click on the Import command button in the upper right of the window (see Figure 5.2).

CHAPTER 8

Deleting Headers from Table Retrievals

The Table Retrieval feature enables you to create automated links to import data into TimeWizard from other systems within your organization, such as Human Resources and Accounting systems. To learn the fundamentals of setting up and running an interface, please see "Introduction to the TimeWizard Interface Controller" in Section 7 of the *TimeWizard Administrator's Guide*. To learn to use the Table Retrieval feature, see Chapter 25, "Working with the Table Retrieval," in the *Administrator's Guide*.

You can use a database or a flat file as the data source for a Table Retrieval. A flat file may contain a header in the first row of the file. TimeWizard enables you to prevent the import of header text into a data cell of a TimeWizard database when you perform a Table Retrieval.

Objective

1. Deleting a Header from a Table Retrieval

Objective 1: Deleting a Header from a Table Retrieval

Identifying your data source type as a flat file (Figure 6.1) gives you the option of preventing header text from being imported to a data cell of a TimeWizard database table. If you identify your data source type as a database, you will not need this option, and it will not display.

If you do not select "File Contains Header" in the Table Retrieval setup options, TimeWizard processes every row of the file as data.

To delete a header from a Table Retrieval:

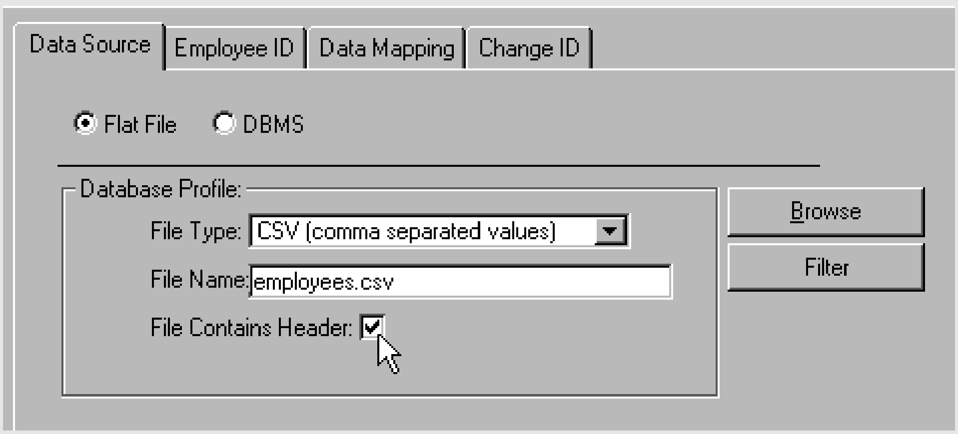


Figure 8.1

1. In the Interface Controller, open the Table Retrieve setup window by double-clicking the Table Retrievals interface ID (or, with the row selected, select Setup Options from the Interface menu, click the Setup Options icon, or right-click the interface type or ID and select Setup Options from the popup menu).
2. After entering a name for the retrieval set and adding a map table, select Flat File as the data source type.
3. Select the file type and enter the file name.
4. Select "File Contains Header."
5. Click "Apply" to save the settings and remain in the window or click "OK" to save the settings and exit the window.

C H A P T E R 9

Synchronizing TimeWizard with Microsoft Project and Business Engine ProjectServer

If you link TimeWizard to both Microsoft Project (MSP) and Business Engine ProjectServer, changes you make to activities in MSP are carried out in TimeWizard. This chapter discusses how TimeWizard synchronizes activity and assignment status with MSP when MSP is connected to ProjectServer. For other information about ProjectLinks, consult the specific TimeWizard User's Guide for the ProjectLink your organization uses.

Closing an activity in MSP

When you close an activity in MSP and TimeWizard retrieves MSP/Project Server data, TimeWizard automatically closes the activity in the TimeWizard database. The retrieval also closes any resource assignments and employee assignments that are based on the activity.

TimeWizard logs the last transaction date as the "actual finish" date. If no transaction data has been saved for an assignment, TimeWizard uses the actual finish date that was posted in MSP/ProjectServer for the activity and all associated assignments.

If you want to close a resource assignment or employee assignment without closing the activity on which it is based, you must close the assignment directly in TimeWizard—not through the retrieval. If you subsequently execute an update from TimeWizard to MSP/ProjectServer, the update will display an actual finish date for the assignment in MSP/ProjectServer.

Opening an activity in MSP

When you open a previously-closed activity in MSP and TimeWizard retrieves MSP/Project Server data, TimeWizard automatically opens the activity in the TimeWizard database.

NOTE

Opening an activity during a retrieval from MSP/ProjectServer does not open any associated assignments in TimeWizard. You control which assignments you want to reopen in TimeWizard after the retrieval.

If you open a resource assignment or employee assignment directly in TimeWizard, a subsequent update will open the assignment in MSP/ProjectServer.

LaborLogix

TimeWizard®
Administrator's Guide

TimeWizard® 4.2

Administrator's Guide

TimeWizard® 4.2 TimeWizard Administrator's Guide

LaborLogix, Inc.

Bethesda, Maryland

USA

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Understanding the Basics

Remembering English 101

If you can recall seventh grade English and the six types of questions—who, what, when, where, why, and how—then you are well on your way to understanding the basic structure of TimeWizard. At the product's simplest level, it serves to answer these same questions:

Who is working?

The answer to this question lies in the TimeWizard Employees area (see Section 4: Managing Resources), which compiles the list of resources who are able to make time entries in the TimeWizard system.

What are they working on?

The answer to this question lies in the TimeWizard Activities and Assignments area (see Section 5: Managing Projects), which compiles the list of jobs on which the employees can work.

What types of time are they charging to the task?

This type of detailed information can be gathered in TimeWizard and shared with appropriate departments company-wide. For example, Payroll may be interested in different types of Paycodes charged and Human Resources may be interested in non-project hours (e.g., holiday, sick leave, maternity leave) charged. The answer to this question lies in two areas:

- The TimeWizard Custom Fields and Code Values areas (see Section 2: Customizing TimeWizard) enable you to customize TimeWizard to gather the specific information that is important to your company.
- The TimeWizard timesheet detail code area (see the *TimeWizard Timesheet User's Guide*) is where the employees can stipulate such details as what type of time (i.e., regular time or overtime) they charged to the task.

When did they work?

The answer to this question lies in three areas:

- The TimeWizard Approval Period area (see Section 3: Defining the Approval Process) defines when the employees *can* work.
- TimeWizard Business Rules (see Section 6: Applying Your Business Rules) enable you to set up user preferences that define the duration of each employee's workday and work week.
- The TimeWizard timesheet (see the *TimeWizard Timesheet User's Guide*) is where the employees stipulate when (i.e., on what specific day) they *did* work.

Where are they working?

This type of detailed information may only be important because different work locations (e.g., at headquarters or off-site) get billed differently. The answer to this question lies in two areas:

- The TimeWizard Detail Code Value area (see Section 2: Customizing TimeWizard) can define such details as where the employees *can* work.
- The TimeWizard timesheet detail code area (see the *TimeWizard Timesheet User's Guide*) is where the employees can stipulate such details as where (i.e., at what location) they *did* work.

Why are they working?

Only the employee can answer this question. And even if the response is "Because you told me to," that answer can be sent in the form of a TimeWizard note. Transaction notes, for example, are attached to specific actions on the timesheet.

How long did they work on the job?

The answer to this question lies in the TimeWizard timesheet, where the employees stipulate exactly how long they worked on a job on a certain day.

TimeWizard is not ready to answer these questions right out of the box. You have to set parameters, get more specific on the questions you want answered, and nurture the product along the way—sounds a lot like raising children! But it will help you to keep everything in perspective to remember that, at its basic level, TimeWizard is designed to answer those six simple questions.

But What Does the Employee Get Out of It?

It may be easy for you to see the advantages of using TimeWizard but quite another for your company's employees to recognize the benefits to them. To that end, we recommend that you review the *TimeWizard Timesheet User's Guide* and the *TimeWizard Timesheet Manager's Guide* so that you have a complete perspective of how your company's employees will use the application.

In the day-to-day management of your company, department owners and project managers break down your company's projects into a number of activities, which are then assigned to the employees (depending on their skills and areas of expertise). However, planning a project and assigning employees to do the work is only part of the process. To be effective, managers need to know how much time is being spent on various activities assigned to each employee. Once the activities are in progress, managers also need to know how much more time is required for completion of these tasks. This is where TimeWizard becomes an invaluable tool.

Using TimeWizard, employees see the activities to which they are assigned on their timesheets when they login. These assignments can be pulled directly from an external project management system, eliminating the need for redundant data entry. The employees then enter the time they have spent working on the individual assignments, noting the number of hours planned for each assignment and the number of hours spent to date. Employees— who know best the effort and time required to complete the work—then can adjust the estimate to complete (hours remaining to complete the assignment). This data can then be updated to a project management system so that the project manager is fully informed.

Let's Review the Value of this Process:

- Managers see the true current status of their projects and can consult with the employees working on the activities to intervene when necessary to add additional resources, modify the schedule, make adjustments to the scope, or take whatever action is deemed appropriate.
- Employees working on the projects benefit directly, because there are no surprises when the completion date arrives and the work is not complete. The communication with management has been ongoing and accomplished with very little effort on the employee's part.
- Managers are armed with the data needed to justify any corrective actions to man-

agement levels above.

- Employees are no longer expected to complete 60 hours of effort in 40 hours of time! Managers can use the historical knowledge gathered by TimeWizard for future planning. By collecting accurate data from the source (the employees working on the activities), managers can make more accurate estimates in future project plans.
- Over-commitment of resources is reduced. Using the knowledge gathered by TimeWizard, managers can see the impact of new assignments on resources. This enables managers to reassign the work to available resources or shift the work to more appropriate time frames before commitments are made.

In short, TimeWizard provides the information and means of communication necessary to keep your managers and employees in synch and to make your company stronger, more effective, and more competitive.

Objectives

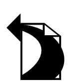
1. Navigate the *TimeWizard Administrator's Guide*
2. Execute the TimeWizard Administrator
3. Log on to the TimeWizard Administrator
4. Change your password
5. Access the About dialog box
6. Send e-mail from TimeWizard
7. Use On-line Help
8. Set up printing specifications
9. Exit the TimeWizard Administrator

Objective 1: Navigate the TimeWizard Administrator's Guide

Can you draw me a map?

At the beginning of this Introduction, we discussed what TimeWizard is designed to do. Now, let's see how this manual is designed to walk you through the steps of setting up the system. Each section in the manual is comprised of chapters that guide you through specific objectives. As you complete each section, you will be prepared to proceed to the next section, which in turn has its own chapters and objectives. In addition, this manual often presents special notes or tips to help you understand key points. Table I.1 explains each icon used in this manual. As you start your journey of setting up TimeWizard for your company, we suggest that you stay on the path that this manual lays out for you.

Table I.1: TimeWizard Guide Icons

TimeWizard Guide Icons	Explanation
	The Notes call attention to information that is especially important. Often, the instructions in the notes affect the functionality of TimeWizard.
	The Tips offer additional information about a topic and often include shortcuts or suggestions.
	The Detours suggest that you review another section or chapter in the manual before continuing.

This guide presumes that your mouse is programmed for right-handed use.

Section 1: Implementing TimeWizard

Put the TimeWizard CD in your computer's CD drive and get started. TimeWizard utilizes InstallShield's Install Wizard, which helps guide you through each step of installation. This section also helps you set up the TimeWizard database, which is necessary for you to use the system.

Section 2: Customizing TimeWizard

Tell TimeWizard what categories of data you want to capture. You will define these categories for three areas: Activities, Detail Codes, and Employees. For example, Activity categories may include "Project," "Subproject," "Job Number," and "Description." Detail Code categories may include "Shift," "Billing Number," and "Cost Type." Employee categories may include "Department Code," "Employee Code," and "Salary Code."

Then, assign attributes, or values, to each category. For example, a Detail Code category called "Shift" may have attributes called "Morning," or "Evening," and "Graveyard." An Employee category called "Employee Code" may have attributes called "Full-time," "Part-time," and "Contract." An Activity category called "Projects" may have attributes called "TW3," "TWInstall," and "WebSite."

Section 3: Define the Approval Process

Decide which is a higher priority for your company:

- Tracking employees' hours to help monitor departmental objectives
- Tracking collective hours charged to specific activities to help manage projects

Your answer will drive how your company approves (that is, validates) the data that TimeWizard gathers.

Then, decide how often your company needs to lock timesheet data, and define the approval periods to match. The frequency with which you establish approval periods may depend on the payroll distribution cycle or how up-to-date you require the actuals to be in your project management system.

Section 4: Managing Resources

Compile a group of employees who are allowed to use TimeWizard. Each employee will be characterized by certain attributes. For example, does the employee work full-time? What is the employee's salary level? And in what department does the employee work?

Section 5: Managing Projects

Give the employees something to do—that is, create activities in the system. To create activities, we use attributes from each Activity category to make unique activities. For example, using the categories "Resource," "Project," "Subproject," "Job Number," and "Description" we could create the activity: ProDev, TW3, Documentation, 154, Writing specs for TimeWizard DataBridge.

Then, put each employee to work on the right activity by making assignments. (In TimeWizard, employees use the timesheet to charge time on their own assignments to activities.)

Section 6: Defining Business Rules

Give some users special permissions. Place restrictions on other users. In this section, you learn how to set up TimeWizard to reflect your own company's business rules. These include the following:

- Preferences that define "standard" workdays for your employees
- Permissions that stipulate who can go where in the TimeWizard system
- Access lists that control which employees can work on certain activities
- Detail code rules that control what types of time certain employees can charge to certain activities
- Activity pools that stipulate which project managers have approval authority over which activities
- Standard notes that ensure that communication throughout the system is coherent and consistent
- Report category access lists that control which employees can produce which business reports

Section 7: Sharing TimeWizard Data with Other Systems

Stop entering the same data more than once. Get your company's departments to start sharing data so that the whole company can benefit. TimeWizard's Interface Controller enables you to use your application of choice for all of your business efforts. For example, you may prefer to manage your projects and activities in Microsoft Project 98 and your Human Resources efforts in PeopleSoft. Interfaces with these systems enable you to populate TimeWizard with the appropriate project and personnel records. Once the data is approved or updated, TimeWizard can update your external system, making manual updates unnecessary.

Objective 2: Execute the TimeWizard Administrator

Once you have successfully installed TimeWizard and set up the TimeWizard database, you can execute the application and log on.

Executing TimeWizard

To execute TimeWizard, follow these steps:

1. Double-click on the "TimeWizard Administrator" icon in the TimeWizard group window.
2. Windows 95 users, position your cursor over the TimeWizard menu item on the Start button menu and then click on TimeWizard.

Figure I.1

Objective 3: Log on to TimeWizard Administrator

Your default login ID is "TWADMIN" and default password is "bendar."

TIP Be sure that you do not have the Caps Lock on.

Logging On to TimeWizard

To log on, follow these steps:

1. Select your login ID from the the drop-down menu. Scroll through the list to locate and select your ID. You also can begin typing your logon ID in the Login ID text box; as you type, TimeWizard searches ahead for a match.
2. When your login name appears in the text box, press tab or click on the Password text box
3. Enter your password in the text box.
4. Click "OK" or press <Enter> on your keyboard to open the application.

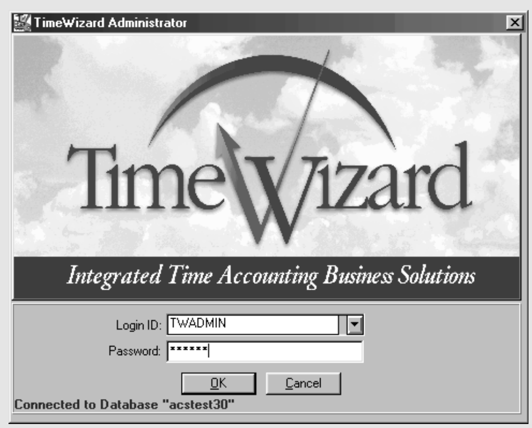


Figure I.2

Objective 4: Change Your Password

System access and security is critical in any shared environment, because it prevents unauthorized access to user data, which in most cases contains important personal information. The use of a password feature enables a system to provide for controlled-access security for user data.

Passwords should be simple to remember by the user but difficult for others to determine. We recommend you change your password immediately to prevent unauthorized access to the TimeWizard functions. Once the default password for the login ID "TWADMIN" has been changed, you cannot use this login ID to enter the Administrator application and change the password if you forget the new password. Designating multiple employees as Administrators (Employees > Employee Detail window) with Advanced Permissions (Permissions > Permissions Profile) is encouraged. Such an Administrator can change another employee's password and grant permissions, but cannot change the password for the login ID "TWADMIN."

Because of encryption limitations, do not use uppercase for your password. In addition, do not begin or end your password with the letter "a."

Changing Your Password

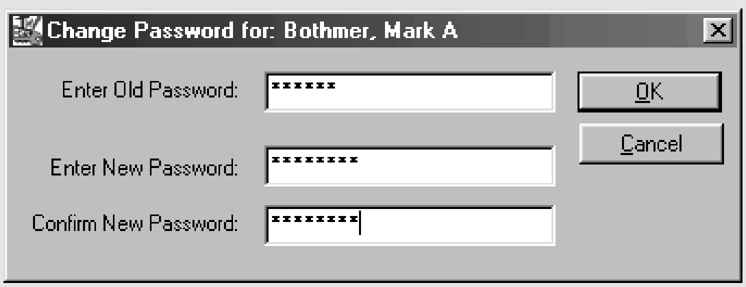


Figure I.3

To change your password, follow these steps:

1. From the File menu, select Change Password to open the "Change Password" dialog box.
2. Enter your current password in the "Enter Old Password" box.
3. Enter a new password in the "Enter New Password" box. Passwords for TimeWizard Administrator must be exactly six characters long. You may use any combination of lowercase letters, numbers or special characters. Remember not to use uppercase and not to begin or end with "a."
4. Enter the new password in the "Confirm New Password" box to confirm it.
5. Click on "OK" to return to the TimeWizard main window.

Objective 5: Access the About dialog box

The "About TimeWizard" dialog box gives you a quick glimpse of your TimeWizard contract information. Use it as a reference to view information including the name of the license owner, the number of licenses in your contract, your customer ID, and your product serial number.

Accessing the About dialog box

To access the About dialog box, follow either of these steps:

1. Select Help > About TimeWizard from the main menu.
2. Click the About icon on the TimeWizard Administrator toolbar.

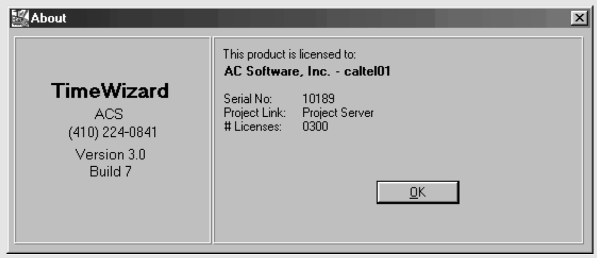


Figure I.4

Objective 6: Send e-mail from TimeWizard

You can send e-mail directly from TimeWizard Administrator if you have a MAPI 1.0 compliant mail system, such as Microsoft Mail or Microsoft Exchange. For assistance with setting up a new e-mail profile, see your network administrator for instructions specific to your e-mail application.

Sending e-mail from TimeWizard

To access the send e-mail from TimeWizard, follow this step:

1. Click the send mail icon  on the TimeWizard toolbar or select File > Send Mail from the main menu to open an e-mail system dialog box, such as the Choose Profile dialog box associated with Microsoft Outlook (Figure I.5).
2. Select your e-mail system or set up a new mail profile.
3. In the example dialog box, click "OK" to open your e-mail system. (Your dialog box may differ but will function similarly.)

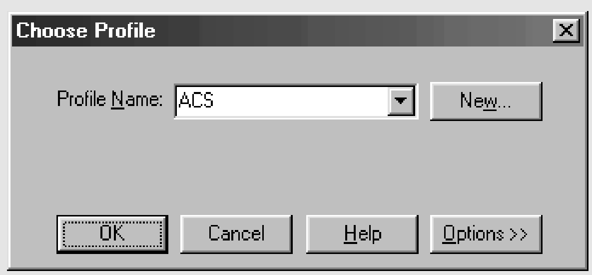


Figure I.5

Objective 7: Use On-line Help

TimeWizard is equipped with extensive on-line help files that, like this manual, guide you through the TimeWizard system.

You can approach the on-line help files in either of two ways:

1. To start with the content page and work your way through in a forward progression, select the Contents tab from the TimeWizard Help main screen.

2. To search for specific information, select the TimeWizard Help Index tab. Then select a specific entry and click the "Display" command button.

The help screen often contains more information than is displayed in the window. You can scroll the help screen by using the scroll bars, or you can use your keyboard in the following manner:

- To scroll down by one line, use the "down arrow" key.
- To scroll up by one line, use the "up arrow" key.
- To scroll the help topic down by one screen or "page," use the "page down" key.
- To scroll the help topic up by one screen or "page," use the "page up" key.
- To scroll to the end of the topic, press the <Ctrl> and <End> keys.
- To scroll to the beginning of the topic, press the <Ctrl> and <Home> keys.

NOTE TimeWizard does not support mouse scroll wheels.

Clicking on the green text with a solid underline will link you to another topic. Clicking on the green text with a dotted underline will open a temporary pop-up window. You can close the pop-up window by clicking once more with the mouse.

Help topics can be viewed one at a time from within the Help window by choosing the Next and Previous commands on the Help menu. These commands display the next or previous help topic as listed in the topic list so you can skim through a number of help topics before closing the window.

At the bottom of most help topics, a small list of related topics appears. You can open and read any of these topics by double-clicking on the topic name. This allows you to jump between related topics quickly.

Using the online help

To use the online help, follow this step:

1. Click on the Help icon on the TimeWizard toolbar or select Help > Help Index from the main menu to open the Help window.
2. From the Help Contents or Index selections, simply click on the topics of choice to find the information you need.
3. To close Help, press the <Esc> key on your keyboard or select Close from the Help menu. When you close Help, you return to your last location in TimeWizard before you opened the Help window.

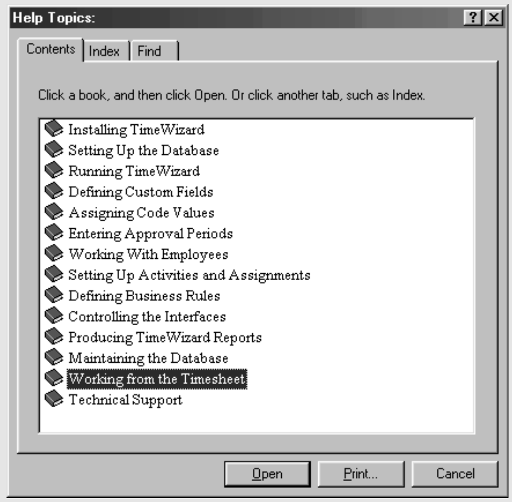


Figure I.6

Objective 8: Set up printing specifications

TimeWizard uses your default printer for printing your timesheet. Click “Printer Setup” to select a different printer, or change the printer settings for the printer on which you want to print the timesheet report.

Setting up printing specifications

To set up printing specifications, follow these steps:

1. Select "Printer" (File > Printer) to open the Printer Setup dialog box.
2. Select the appropriate printer from the printer menu.
3. Click "Setup" to specify printer setup preferences. Follow the setup instruction supplied by your printer vendor.
4. Click "OK" to save printer settings and exit the dialog box.

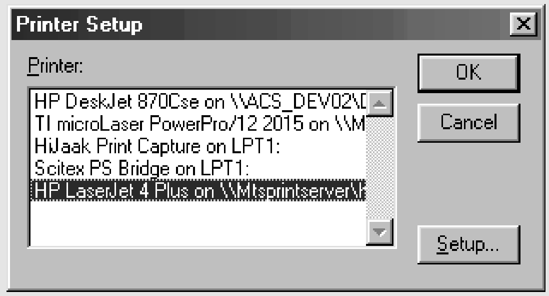


Figure I.7

Objective 9: Exit the TimeWizard Administrator

When you have completed your work in TimeWizard Administrator you may exit the application.

Exiting TimeWizard Administrator

To exit the TimeWizard Administrator, follow these steps:

1. Click on the Exit icon  on the TimeWizard Administrator toolbar or choose Exit from the File menu (File > Exit).
2. TimeWizard displays the Exit dialog box. Click OK to exit the program.

Summary

In this Introduction, we introduced you to the benefits of time accounting and discussed the steps outlined by each section of this manual. In addition, you learned the basics of the TimeWizard system, such as how to log in and exit the TimeWizard Administrator, customize your password, use the on-line help feature, and send information via your company's e-mail.

S E C T I O N   O N E

Implementing TimeWizard

1

In this section, you learn to install the TimeWizard Network, Administrator, and Timesheet files onto your appropriate machines. TimeWizard provides a simple database setup that is performed only once during the initial setup of your TimeWizard system.

In addition, TimeWizard enables you to maintain the database effectively by removing old or unused data. Once several periods have been closed and you no longer need to make historical corrections to that data, you can archive those periods, i.e., copy the old data and remove it from the TimeWizard database. If you have any unneeded activity and employee records in TimeWizard database, you can purge—completely remove—that data.

Introduction to TimeWizard Installation

Introduction to TimeWizard Installation

In this Introduction, you are introduced to the basic concepts that concern the installation of TimeWizard.*enterprise* and the TimeWizard Network, Administrator, and Timesheet files onto your appropriate servers and client-level machines. In addition, we discuss items—such as the software license agreement and technical support—that you should consider before performing an installation.

Objectives

1. Understand the TimeWizard Application Environment
2. Prepare to Install TimeWizard

Objective 1: Understand the TimeWizard Application Environment

The TimeWizard client/server installation consists of three sections:

1. Network
    - TimeWizard Interface Application Server (IAS) and log files
    - Reports
    - Database setup
    - TimeWizard Registration
2. Administrator
3. Timesheet

The TimeWizard Network install resides on your application/file server, visible to all client machines. The Administrator and Timesheet installs reside on appropriate client machines.

If you are installing TimeWizard from an installation CD, you must copy the Timwiz.ini file from the application server to all client machines.

If you are performing the setup from a network to a client machine, the Timwiz.ini file is copied automatically.

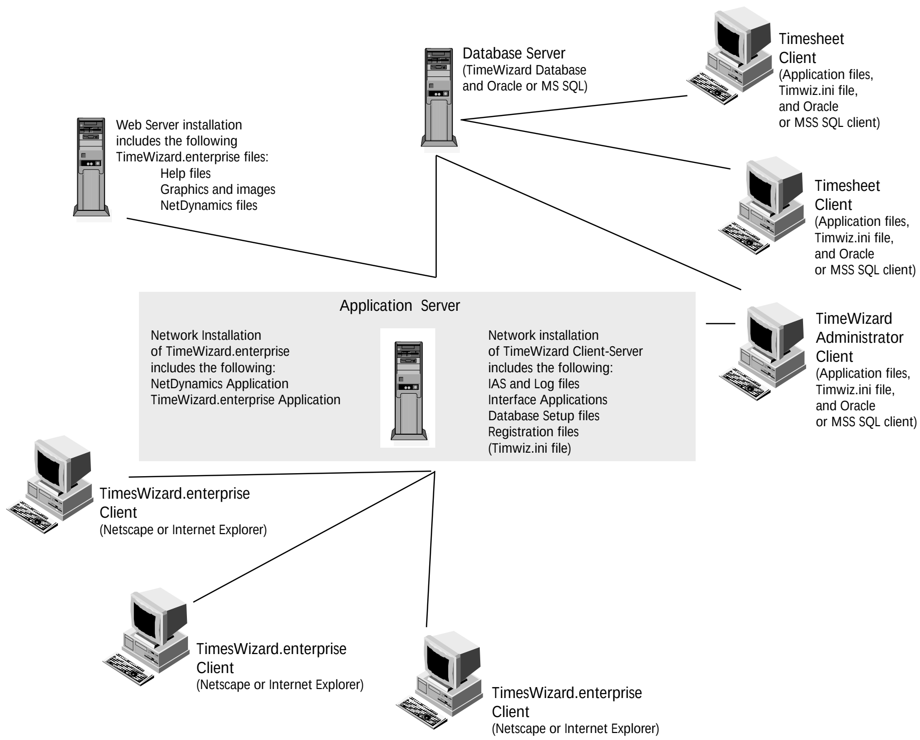


Figure I.1

Running the Interfaces from an Application Server

Import and export processes tend to consume substantial computer resources. In the interest of efficiency, security, and convenience, the TimeWizard data interfaces must be run on an application server, with the execution initiated and controlled from a TimeWizard Administrator client workstation.

NOTE The Administrator application does not have to be running for the scheduler/interfaces to run.

Figure I.1 illustrates the TimeWizard Application Environment, which outlines the relationship between the TimeWizard administror/client machines, the TimeWizard.*enterprise* web server, the TimeWizard database, and the application server.

Setting up the TimeWizard Server Application

The server application is stored and executed on an application server. The server application also is required to be in run mode at all times. The traffic signal displayed on the application server's main window indicates whether the service status is active or inactive. The green light indicates it is active; the red light indicated it is inactive. In addition you can start or stop the service manually, if necessary.

You are required to assign a port number for the application/service in the SERVICES file on the application server. The TimeWizard server application requires a unique port number on the server machine.

For example, you could assign a port number as follows in the \\WINNT\SYSTEM32\SERVICES file:

```
tw_serv   10014/tcp      tw_serv
tw_serv   10014/udp
```

The InterfaceApp.ini file keeps Interface applications information such as Status, Start time, and Stop time. The file gets created every time when TimeWizard server starts. It has three sections:

- Interface Application, which keeps status information for Interface applications based on the control ID, which can be viewed in the Interface Controller.
- Start Time, which keeps date and time stamp when an application has started based on the control ID.
- Stop Time, which keeps date and time stamp when an application has stopped execution based on the control ID.

Setting up the TimeWizard Administrator Application

In the TimeWizard Administrator system Hosts file, you are required to declare the TCP/IP address of the application server where the TimeWizard server application resides.

In addition, you must also identify the HostName and Port number under the [Application Server] heading in the TimWiz.ini file:

```
HostName =      Dev005
Port =          10014
IP Address =    DEV0005
```

Objective 2: Prepare to Install TimeWizard

Before you install TimeWizard, consider the following:

You will need the following to install TimeWizard successfully:

- The drive letter of the CD-ROM drive where you will insert the TimeWizard installation CD-ROM
- The drive letter of the hard drive (your application/file server) where you want TimeWizard installed
- The TimeWizard CD-ROM and this manual

Read the Software License Agreement

Be sure to read the license agreement before you install TimeWizard. This document informs you of your rights as a purchaser of the product as well as the limitations and responsibilities to which you agree by using TimeWizard.

E-mail System Requirements

If you have a MAPI 1.0-compliant e-mail system, users will be able to send e-mail messages from TimeWizard Administrator and from the client/server TimeWizard timesheet. In addition, you can choose to have e-mail messages sent automatically to client/server timesheet users upon approval or rejection of their timesheets by managers.

If you have an SMTP mail server, users will be able to send e-mail messages from TimeWizard.enterprise. In addition, you can choose to have e-mail messages sent automatically to TimeWizard.enterprise users upon approval or rejection of their timesheets by managers.

The TimeWizard Exception Processor can send e-mail messages to specified individuals regarding exceptions, such as missing approvals or rejected timesheets. For information on system setup procedures for the Exception Processor, see the TimeWizard Implementation Guide.

Technical Support

LaborLogix, Inc. provides free technical support for 30 days following TimeWizard installation. After that time, you may purchase a technical support contract.

For technical assistance with TimeWizard, contact a technical representative at LaborLogix, Inc.:

Phone: 1-(888) 463-9973
Fax: (301) 718-5141
Email: Support@LaborLogix.com

When you contact us, please have the following ready for the technical support staff:

- Your company name
- Your company's telephone and fax numbers
- Your TimeWizard serial number
- Information about your computer configuration—such as your database management system.

CHAPTER 1

Installing TimeWizard

The TimeWizard installation process utilizes the InstallShield wizard, which displays dialog boxes to help guide you through each installation step. Objective 1 of this chapter covers installation dialog boxes 1-4. After you complete installation dialog boxes 1-4 and accept the TimeWizard Software License Agreement, you may proceed to Objectives 2, 3, or 4 to select and install specific TimeWizard files to your system.

Objectives

1. Start the TimeWizard Installation
2. Complete the TimeWizard.*enterprise* Installation
3. Configure the browser settings for TimeWizard.enterprise
4. Complete the TimeWizard Administrator Server/TimeWizard IAS Installation
5. Complete the TimeWizard Timesheet Client Installation

Objective 1: Start the TimeWizard Installation

The first steps in installing TimeWizard include the license agreement, database selection, and user registration. These dialog boxes are identical for each product installation.

Starting the TimeWizard Installation

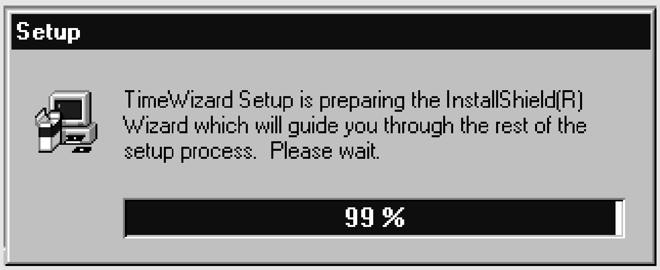


Figure 1.1

To start the TimeWizard Installation, follow these steps:

1. Insert the TimeWizard CD-ROM into the CD-ROM drive.
2. Open Windows Explorer to view the contents of the TimeWizard Install CD.

   Then in the TimeWizard CD contents display (in Windows Explorer) double-click on the TimeWizard Setup icon to open the TimeWizard Install Welcome dialog box and begin the installation process.
3. Or click the Start button and then select "Run" from the Start button menu.

   Then in the Run dialog box, type the drive specification followed by the file name "Setup" (or click on the Browse command button to locate the setup file) and click OK.
4. TimeWizard launches the InstallShield Wizard, which guides you through the rest of the installation process.

NOTE: There are instances during the installation process when TimeWizard may display a dialog box that prompts you to take a certain action before proceeding.

Example 1: If you have an earlier version of the application installed, TimeWizard displays a message suggesting that you abort the current installation until you have uninstalled the earlier version. (See Figure 1.2.)

Figure 1.2

Example 2: Before installing TimeWizard.*enterprise*, you first should install the NetDynamics Application Server. If TimeWizard cannot detect the NetDynamics Application Server, it displays a message suggesting that you exit the TimeWizard installation and install NetDynamics before proceeding. (See Figure 1.3.)

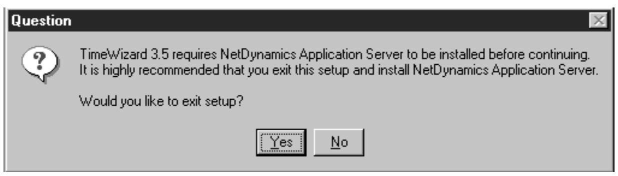


Figure 1.3

Example 3: To install TimeWizard Administrator, you must be operating on Windows NT. If TimeWizard cannot detect the Windows NT operating system, it displays a message suggesting that you exit the TimeWizard installation and install on a Windows NT system. (See Figure 1.4.)

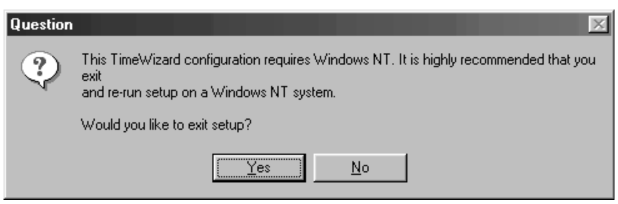


Figure 1.4

Installation Dialog Box 1: Welcome

1. This dialog box explains that the installation process will copy TimeWizard files to your computer. It recommends that you exit all Windows programs before proceeding.
2. Click Next to continue or Cancel to exit the installation.

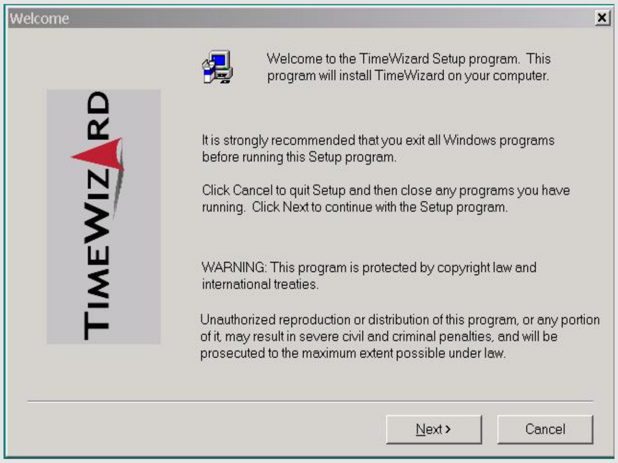


Figure 1.5

Installation Dialog Box 2: Database Selection

1. This dialog box enables you to select which database files are copied to your system. The choices are Oracle, Microsoft SQL. Your selection depends on which database you use currently.
2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

Figure 1.6

Installation Dialog Box 3: User Information

1. Enter your name and company as you would like for those entries to appear in the TimeWizard registration. By default, TimeWizard populates the data fields based on settings from the host machine system registry.
2. Enter the Activation Key in the data field. The activation key is supplied with the software.

   If necessary, call TimeWizard Technical Support for assistance with your activation key.
3. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

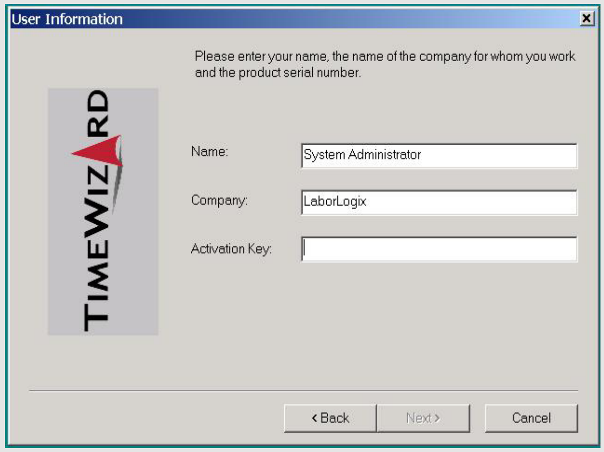


Figure 1.7

Objective 2: Complete the TimeWizard.enterprise Installation

After you complete installation dialog boxes 1-4 and accept the TimeWizard Software License Agreement, you may begin to select and install specific TimeWizard.*enterprise* files to your system.

NOTE The files available for download depend on the TimeWizard activation key you entered in dialog box 3.

Installation Dialog Box 5: Language Selection

1. This dialog box enables you to select one or more language files to copy to your system. TimeWizard.*enterprise* currently is available in English, French, and German.
2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

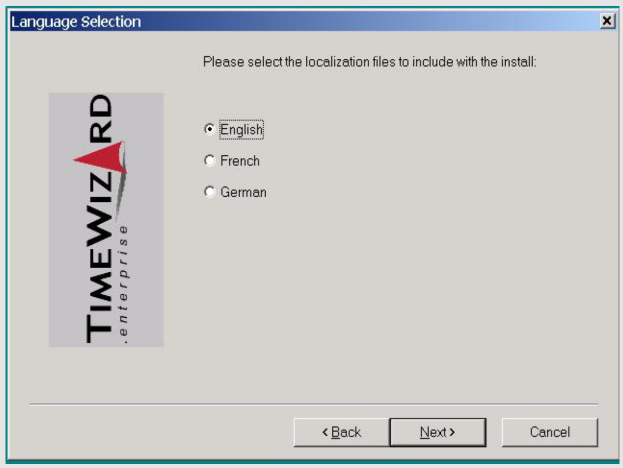


Figure 1.9

Installation Dialog Box 6: Select Components

1. This dialog box enables you to select the components you want to install and to clear the components you do not want to install.

   For each component selected, TimeWizard displays a file description. In addition TimeWizard displays a running tally of space required for all selected components as well as the space available on your C: drive.

2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

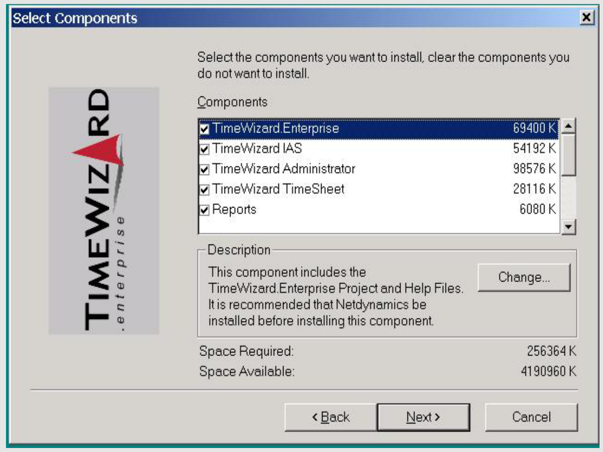


Figure 1.10

Installation Dialog Box 7: Destination Location

1. This dialog box enables you to select a destination folder in which all of the selected components will be installed. The default destination is the C: drive of the host computer. Click the Browse command button specify a new destination.

2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

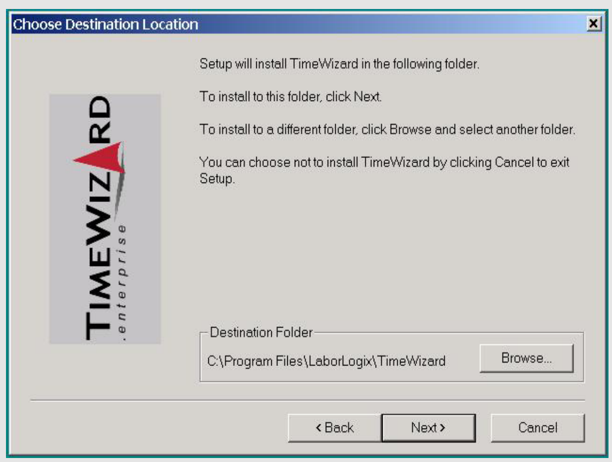


Figure 1.11

Installation Dialog Box 8: Destination Location (NetDynamics)

1. This dialog box enables you to select a destination folder in which all of the NetDynamics-based Project files will be installed and a destination folder in which all of the Help files will be installed. The default destination of each is the C: drive of the host computer. Click the Browse command button to specify a new destination.
2. Click Back to return to the previous dialog box, or Next to continue, or Cancel to exit the installation.

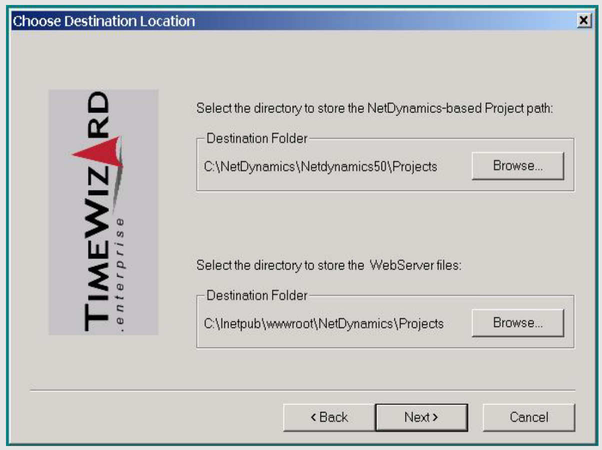


Figure 1.12

Installation Dialog Box 9: Select Program Folder

1. This dialog box enables you to name the Program folder in which all of the TimeWizard timesheet program icons will be installed. The default name of the Program folder is TimeWizard 3.0.
2. Click Back to return to the previous dialog box, or Next to continue, or Cancel to exit the installation.

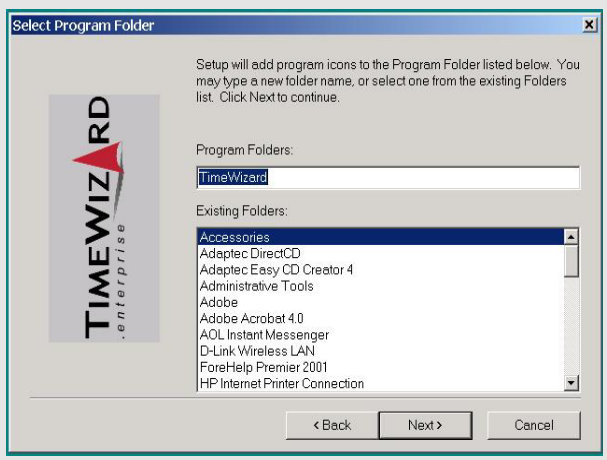


Figure 1.13

Installation Dialog Box 10: Application Server Address

1. Enter the IP address of the application server in the data field.
2. Enter the Host name of the application server in the data field.
3. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

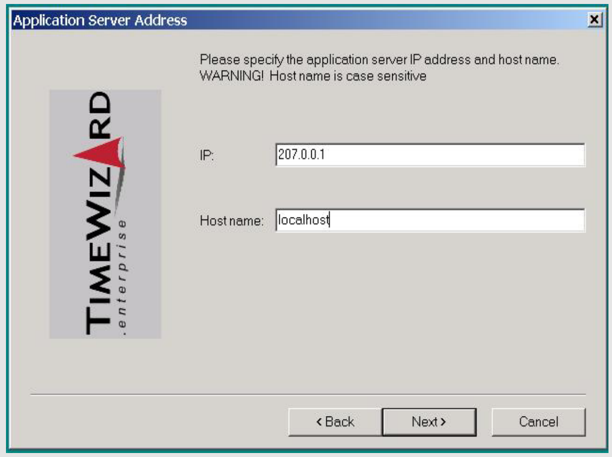


Figure 1.14

Installation Dialog Box 11: Start Copying Files

1. This dialog box summarizes your installation settings and gives you a final opportunity to alter any selections.
2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

   Note: Clicking Next begins the TimeWizard installation.
3. Click Finish to complete Setup.

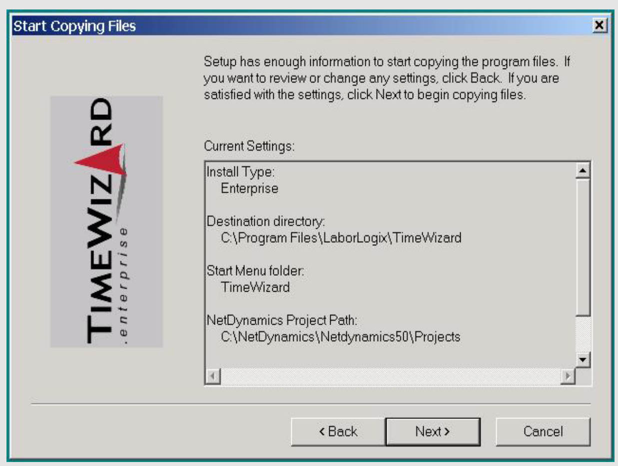


Figure 1.15

Objective 3: Configure the browser settings for TimeWizard.enterprise

There are specific browser settings required for TimeWizard.*enterprise* that you can set in NetDynamics from the command center. All kinds of browser errors can occur in TimeWizard.*enterprise* without these set.

Configuring the browser settings

To configure the browser settings, follow these steps:

1. Open the NetDynamics Command Center.
2. Click on the Connection Processor Service from the hierarchy in the left frame of the NetDynamics Command Center sreen.
3. Click on the Browsers tab.
4. Make sure the Frames Support, Dynamic Frames Support, and Java Script Enabled check boxes are checked for MSIE4 and Mozilla/4.
5. Save the changes.
6. Select Action > Restart from the main menu to restart the CP Service.
7. Select Utilities > Clear Cache to clear cache.

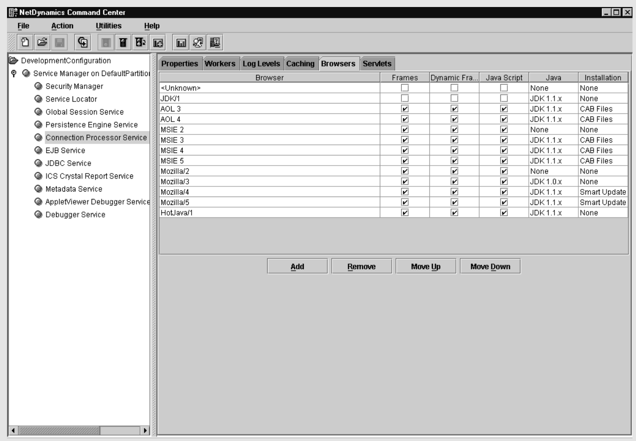


Figure 1.16

NOTE

These are not default settings.

Objective 4: Complete the TimeWizard Administrator/TimeWizard IAS Installation

After you complete installation dialog boxes, you may begin to select and install any combination of specific TimeWizard files to your server.

NOTE

The files available for download depend on the TimeWizard activation key you entered in dialog box 3.

Stop! It is not time to run TimeWizard. You must first do the following:

Installation Dialog Box 5: Language Selection

1. This dialog box enables you to select one or more language files to copy to your system. TimeWizard client-server currently is available in English only.
2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

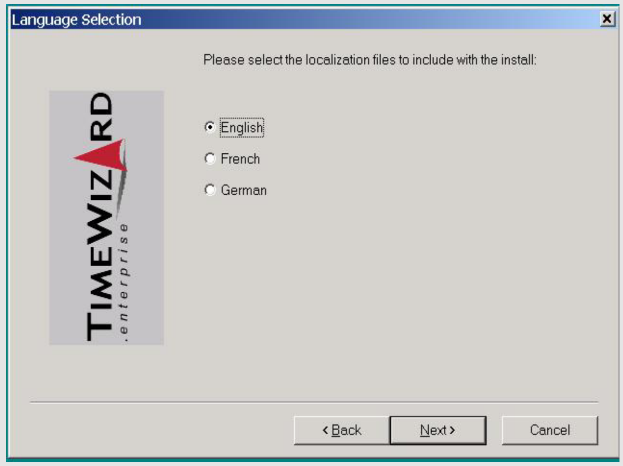


Figure 1.17

Installation Dialog Box 6: Select Components

1. This dialog box enables you to select the components you want to install and to clear the components you do not want to install.

   TIP For each component selected, TimeWizard displays a file description. In addition TimeWizard displays a running tally of space required for all selected components as well as the space available on your C: drive.

2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

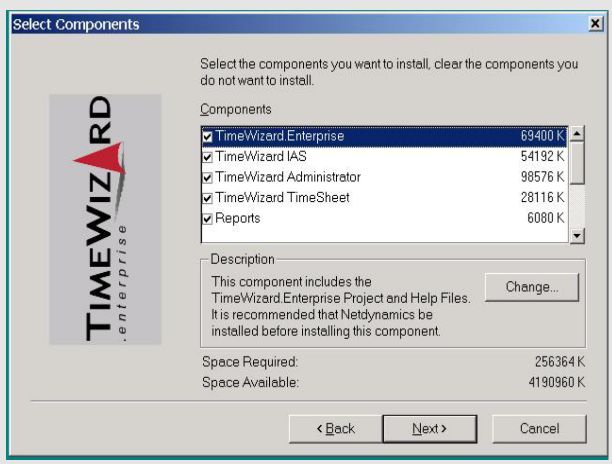


Figure 1.18

Installation Dialog Box 7: Destination Location

1. This dialog box enables you to select a destination folder in which all of the selected components will be installed. The default destination is the C: drive of the host computer. Click the Browse command button specify a new destination.
2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

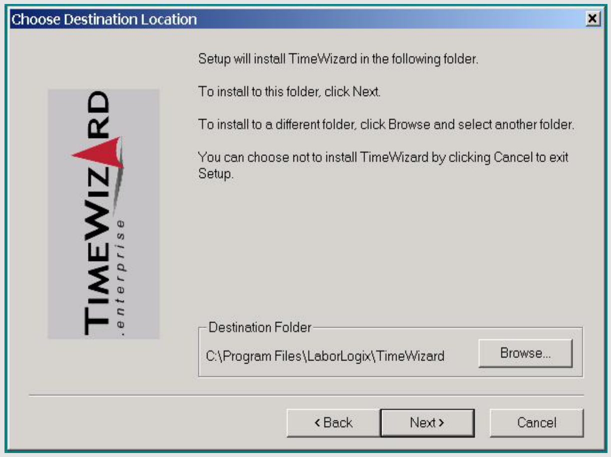


Figure 1.19

Installation Dialog Box 8: Select Program Folder

1. This dialog box enables you to name the Program folder in which all of the TimeWizard timesheet program icons will be installed. The default name of the Program folder is TimeWizard 3.0.
2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

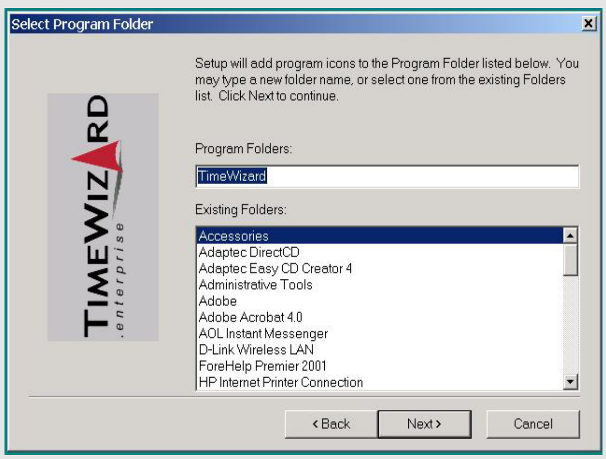


Figure 1.20

Installation Dialog Box 9: Application Server Address

1. Enter the IP address of the application server in the data field.
2. Enter the Host name of the application server in the data field.
3. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

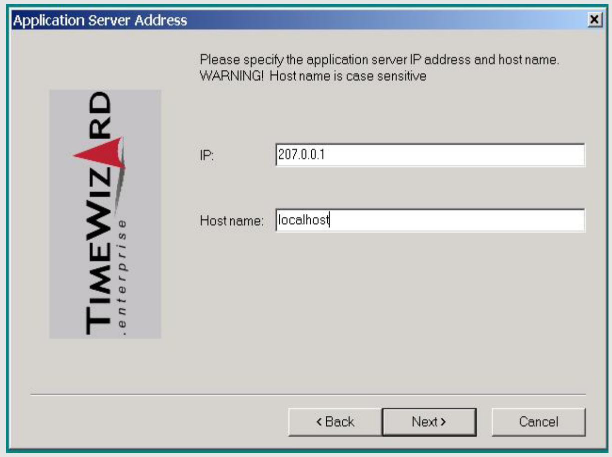


Figure 1.21

Installation Dialog Box 10: Start Copying Files

1. This dialog box summarizes your installation settings and gives you a final opportunity to alter any selections.
2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

   NOTE: Clicking Next begins the TimeWizard installation.
3. Click on radio button to restart the computer now or later, then click on Finish to complete Setup.

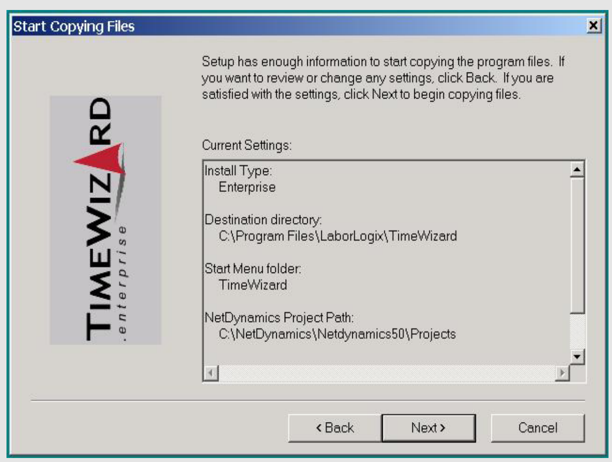


Figure 1.22

Objective 5: Complete the TimeWizard Timesheet Client Installation

After you complete installation dialog boxes 1-4 and accept the TimeWizard Software License Agreement, you may begin to install TimeWizard timesheet files to your client machine.

NOTE The files available for download depend on the TimeWizard activation key you entered in dialog box 3.

Installation Dialog Box 5: Timesheet Documentation Selection

1. TimeWizard displays a Question dialog box asking whether you want to install the Timesheet documentation.
2. Click Yes or No to continue.

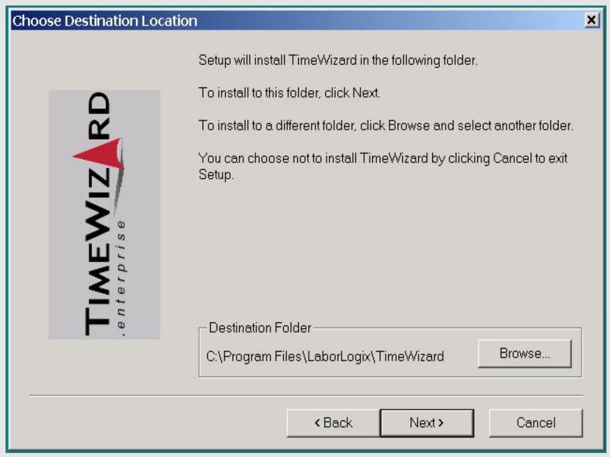


Figure 1.23

Installation Dialog Box 6: Destination Location

1. This dialog box enables you to select a destination folder in which all of the TimeWizard timesheet files will be installed. The default destination is the C: drive of the host computer. Click the Browse command button specify a new destination.
2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

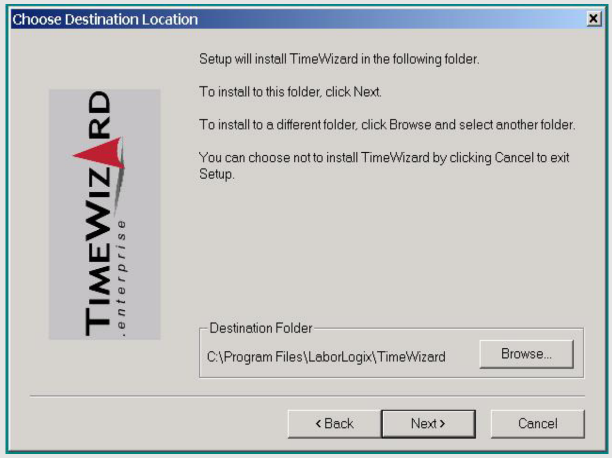


Figure 1.24

Installation Dialog Box 7: Select Program Folder

1. This dialog box enables you to name the Program folder in which all of the TimeWizard timesheet program icons will be installed. The default name of the Program folder is TimeWizard 3.0.
2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

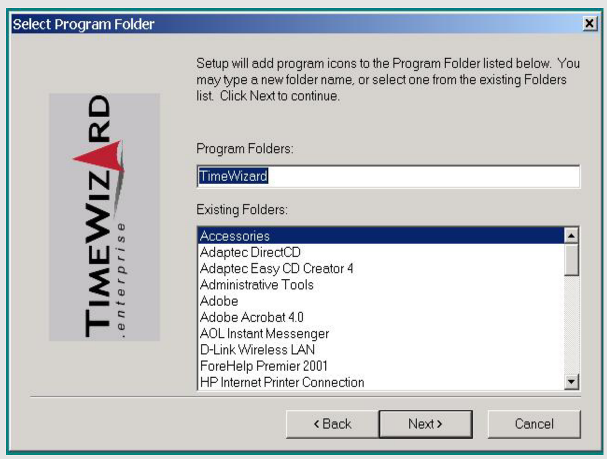


Figure 1.25

Installation Dialog Box 8: Start Copying Files

1. This dialog box summarizes your installation settings and gives you a final opportunity to alter any selections.
2. Click Back to return to the previous dialog box or Next to continue or Cancel to exit the installation.

   NOTE: Clicking Next begins the TimeWizard installation.
3. Click on Finish to complete Setup.

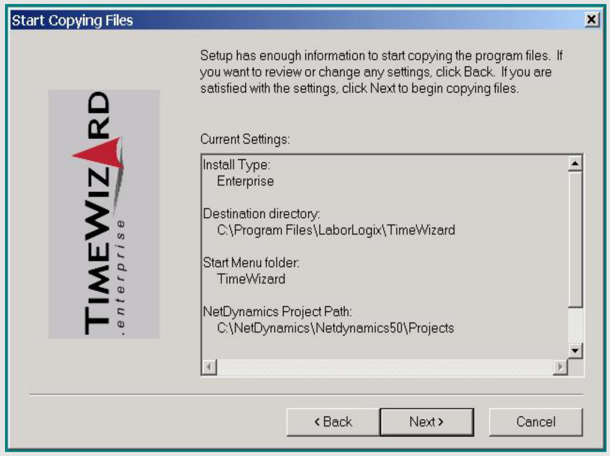


Figure 1.26

NOTE

- Set up the TimeWizard Database. See Chapter 2 for complete instructions.
- For Oracle: The Database Administrator must create an alias for the Oracle server. The Oracle user must be assigned a role that includes connect, DBA, and resource privileges.

NOTE

For Oracle, three table spaces are required: TWMAIN, TWIndexes, and TWInterfaces. In addition, the DBA should work with a TimeWizard technical support representative to determine sizing requirements for the database, based on volume projections for number of users and activities.

Summary

Once you have completed installing the TimeWizard application, your next step is to set up the TimeWizard database and registration.

CHAPTER 2

Working With the TimeWizard Database

In this chapter, you learn how to set up or upgrade your TimeWizard Database and register the system. TimeWizard provides a simple database setup that is performed only once during the initial setup of your TimeWizard system. The completion of the database setup also writes all database connection information to the Timwiz.ini file.

NOTE Before running database setup, you must copy the “twreg.dat” registration file to the network TimeWizard directory. This file is provided by a TimeWizard technical support representative and is necessary for you to register licensing information to the database.

If you upgraded TimeWizard from an earlier version of the TimeWizard 3.x product line, you may want to continue using the same TimeWizard database, which already contains your organization’s employees, assignments, and other data. In that case, you will upgrade the database instead of performing the database setup for a new database.

Objectives

1. Execute the Database Setup or Database Upgrade
2. Set Up the TimeWizard Database
3. Modify Your TimeWizard Database Setup
4. Register TimeWizard
5. Upgrade the TimeWizard Database
6. Purge Data from Your TimeWizard Database

Objective 1: Execute the Database Setup or Database Upgrade

The TimeWizard database setup is a separate executable from the TimeWizard Administrator.

Executing the Database Setup or Upgrade

To execute the database setup or upgrade, follow these steps:

1. Locate the TimeWizard group window.
2. Double-click on the database icon in the TimeWizard Group window or select "Database Setup" from the TimeWizard Start Menu folder to open the Database Setup Login window.
3. Select DB Setup or Upgrade.
4. Enter the Database Setup password in the data field. The password was supplied with your TimeWizard software.

   If necessary, call TimeWizard Technical Support for assistance with your Database Setup password.

Figure 2.1

Objective 2: Set Up the TimeWizard Database

TimeWizard provides a simple database setup that is performed only once during the initial setup of your TimeWizard system. Table 2.1 explains each area and command button available in the Setup Database window. If you are upgrading from an earlier version of the TimeWizard 3.x product line and want to use your existing TimeWizard database, continue with Objective 5 instead of setting up a new database.

Do not use uppercase passwords for the database password. In addition, due to encryption limitations, do not begin or end with the letter "p."

Setting Up the TimeWizard Database (continued on page 54)

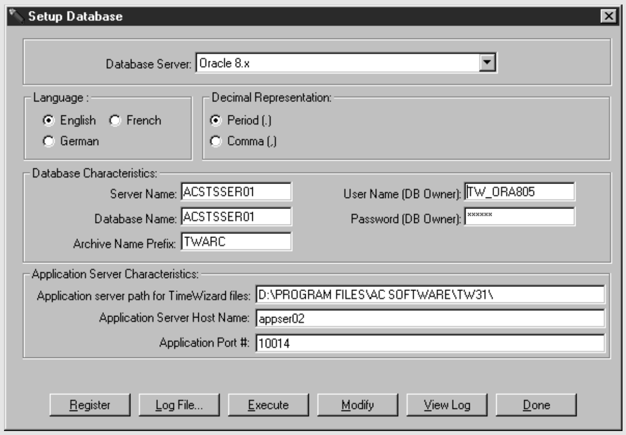


Figure 2.2

To set up the TimeWizard database, follow these steps:

1. In the Setup Database window, click on the drop-down box at the top of the screen to display a list of valid DBMS Servers. Click on the appropriate server used by your company.

This selection must be in synch with your database selection during TimeWizard installation. If your installation selection was either Sybase or SQL, your database server options are either Sybase or MS SQL Server. If your installation selection was Oracle, your database server options are either Oracle 7.x or Oracle 8.x (for Oracle 8i, select Oracle 8.x).

2. In the Language area, select a language for the database. This selection must be in synch with your language selection(s) during TimeWizard installation.

You may only have one language selection per database.

3. In the Decimal Representation area, click or tab to specify whether you want to represent decimals by a period or a comma.

4. In the Database Characteristics area, click or tab to specify the name of the server on which the TimeWizard database resides.

If you selected Oracle 7.x or Oracle 8.x as your Database Server, enter all letters in the Server Name in uppercase. If you selected Oracle 7.x, enter the symbol "@" as the beginning of the Server Name.

5. In the Database Characteristics area, click or tab to specify the name of the TimeWizard database.

If you selected Oracle 8.x as your Database Server, make the Database Name exactly the same as the Server Name. If you selected Oracle 7.x, make the Database Name the same as the Server Name, but without "@."

6. In the Database Characteristics area, click or tab to specify the file name prefix for the database archive.

7. In the Database Characteristics area, click or tab to specify the user name of the database owner.

Setting Up the TimeWizard Database (continued from page 53)

8. In the Database Characteristics area, click or tab to specify the password of the database owner.

   NOTE Do not use uppercase passwords for either the database password or the user-level TimeWizard password—lowercase only!

9. In the Application Server Characteristics area, click or tab to specify the path to the directory on your server where the Network TimeWizard files have been installed.
10. In the Application Server Characteristics area, click or tab to specify the name of the application server machine.
11. In the Application Server Characteristics area, click or tab to specify the port number of the application server machine.
12. Once you have entered the appropriate information in all the fields, click on the Execute command button to begin the database setup. If errors occur during the database setup, TimeWizard displays a message advising you to check the log file for detailed error messages. In this event, seek assistance from your Database Administrator or a TimeWizard technical representative.
13. Follow the steps in Objective 4 of this chapter to register TimeWizard.
14. Click on the Done command button to complete the process and exit the Setup Database window.

Objective 3: Modify Your TimeWizard Database Setup

Modifying Your TimeWizard Database

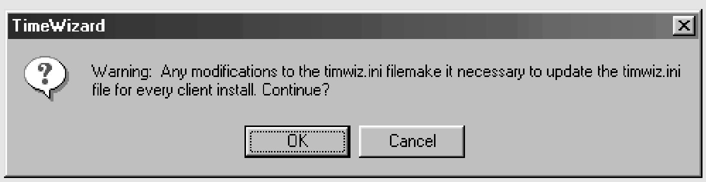


Figure 2.3

To modify your TimeWizard database setup, follow these steps:

1. Edit the boxes you want to modify. You can change the physical location (server) on which the TimeWizard database resides. You also can change the database name, password, or path for TimeWizard files, as well as modify the archive prefix. (See Objective 2 for rules for these text boxes.)

   NOTE You may not change the DBMS.

2. Click on the Modify command button at the bottom of the Setup Database window. TimeWizard displays the Warning dialog box. Click OK to continue.
3. Click on the Done command button to complete the process and exit the Setup Database window.

Table 2.1: Set up Database Data and Commands

Setup Database Data and Commands	Explanation
Database Server	This selection must be in synch with your database selection during TimeWizard installation. If your installation selection was either Sybase or SQL, your database server options are either Sybase or MS SQL Server. If your installation selection was Oracle, your database server options are either Oracle 7.x or Oracle 8.x.
Language	This selection must be in synch with your language selection during TimeWizard installation. Note: You may only have one language selection per database.
Decimal Representation	This enables you to specify whether you want to represent decimals by a period or a comma.
Server Name	This is the name of the server on which the TimeWizard database resides. (For Oracle databases, see Objective 2.)
Database Name	This is the name of the TimeWizard database. (For Oracle databases, see Objective 2.)
Archive Name Prefix	This is the file name prefix for the database archive.
User Name (DB Owner)	This is the user name of the database owner.
Password (DB Owner)	This is the password of the database owner. Note: Do not use uppercase passwords for the database password —use lowercase passwords only! Do not begin or end the database password with the letter "p."
Application Server Path For TimeWizard Files	This specifies the location of the TimeWizard network application files.
Application Server Host Name	This is the name of the application server machine.
Application Port Number	This is the port number of the application server machine.
Register Command Button	This command button opens the registration dialog box, in which you enter the registration password.
Log File Command Button	This command button enables you to specify the name of the log file into which TimeWizard enters any error diagnostics generated during the database setup.
Execute Command Button	This command button executes the database setup process.
Modify Command Button	This command button enables you to modify an existing database setup. Note: Any modifications to the Timwiz.ini file make it necessary to update the Timwiz.ini file for every client install.
View Log Command Button	This command button enables you to view existing log files, which report any error diagnostics generated during the database setup.

Objective 4: Register TimeWizard

TimeWizard registration stamps the database with the product serial number and your company's license information.

Registering TimeWizard

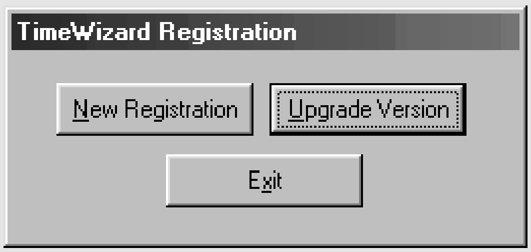


Figure 2.4

Figure 2.5

To register TimeWizard, follow these steps:

1. Click on the Registration command button at the bottom of the Setup Database window to open the TimeWizard Registration dialog box (see Figure 2.4).
2. Specify whether this is a new registration or an upgrade version to open the appropriate registration password dialog box (see Figure 2.5).
3. Enter your TimeWizard password, provided to you by your TimeWizard representative.
4. Click "Done." TimeWizard executes the registration process automatically and returns to the Setup Database window.

Objective 5: Upgrade the TimeWizard Database

To continue using your current TimeWizard database after upgrading the application from an earlier version of the TimeWizard 3.x product line, perform a database upgrade instead of setting up a new database.

NOTE After upgrading your TimeWizard database, you do not have to register TimeWizard again.

Upgrading the TimeWizard Database

To upgrade the TimeWizard database, follow these steps:

1. In the Upgrade Database window, review the current setup information about your TimeWizard database. To modify information, click or tab to a text box and follow the rules in Objective 2 regarding input for these boxes.
2. Click on the Upgrade command button. If errors occur during the database upgrade, TimeWizard displays a message advising you to check the log file for detailed error messages. In this event, seek assistance from your Database Administrator or a TimeWizard technical representative.
3. When you receive the message, "Database upgrade completed successfully," click on the Done command button to complete the process and exit the Upgrade Database window.

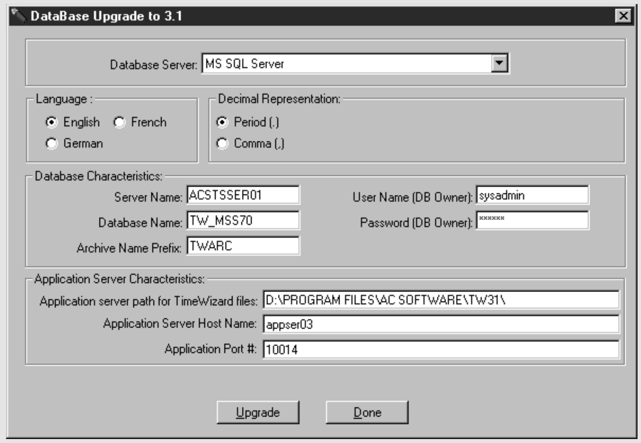


Figure 2.6

Objective 6: Purge Data from Your TimeWizard Database

The purge function in TimeWizard allows you to delete unneeded data from your TimeWizard database. TimeWizard saves purged data to tab-delimited ASCII files in directories that you specify. You may choose to purge unneeded data to prevent your TimeWizard database from becoming too large and cumbersome. Carefully consider which data to purge. Purged data will not be available for TimeWizard Reports or export to external systems.

NOTE

Making a backup of your TimeWizard database before using the purge function is highly recommended.

Purge Criteria

Approval periods, activities, employees, or departments that meet the criteria below may be purged.

- An **approval period** can be purged if any and all previous periods are being purged.
- An **activity** can be purged if no transactions (i.e., timesheet hours) exist for any associated employee assignment in any period. (Purging an activity purges all associated resource assignments and employee assignments.)
- An **employee** can be purged if no transactions exist for the employee in any period.
- A **department** can be purged if none of the department's employees have the Department status "Pending" or "Approved" for any period. However, the default department, i.e., the highest level of the hierarchy in the Departments window, cannot be purged.

NOTE

Because approval periods that contain transactions can be purged, you can purge activities or employees that have transactions by first purging the periods that contain those transactions. Similarly, you can purge departments that have "Pending" or "Approved" timesheets by first purging the periods with those statuses. WARNING: When you purge a period, the period is purged for all employees.

NOTE

If you purge the current approval period, no employees will be able to log in to their timesheets. Purge the current period only when you intend to create a new current period immediately.

NOTE

TimeWizard treats an audit record in the database as a transaction, even when no transaction is displayed on the employee's timesheet. If a transaction has been cleared from a timesheet after the audit time has elapsed or during an Historical Correction, the employee or associated activity cannot be purged while the period exists in the database.

The Purge Window

The Purge window contains four tab pages, one for each category of data that you may select (see Figure 2.7). The upper frame of each tab page displays all the data eligible to be purged from the selected category. While any rows are selected, you cannot open a different tab page.

The Log Files Path text box is located in the lower left frame. Here you will enter the directory

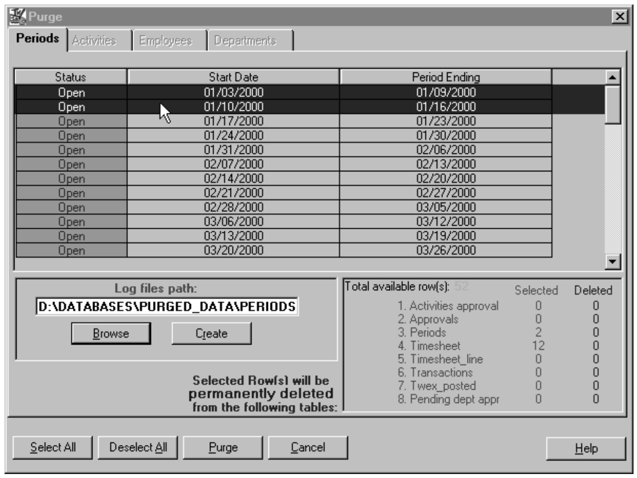


Figure 2.7

path where you want purged data to be stored in ASCII files.

The status frame is located in the lower right. The total number of rows available to be purged in the selected category, i.e., the number of rows in the upper frame, displays at the top of the status frame. The left column in the status frame lists all the TimeWizard database tables that may be affected by a purge in the selected category. While rows are selected in the upper frame, the middle column of the status frame, "Selected," displays the number of database records that will be deleted from the corresponding database tables if you proceed with the purge.

After you complete a purge, the right column of the status frame, "Deleted," displays the number of database records that were successfully deleted from the corresponding database tables. The Total Available Rows indicator is updated to reflect the new number of rows in the upper frame after the purge. The numbers of deleted records in the column "Deleted" will display until you choose another tab or exit the Purge window.

Because the purge process removes the selected rows from the upper frame, the column "Selected" will display zeros after the purge has been executed. If you want to compare the number of rows deleted with the number of rows that were selected for each table, note the numbers from the column "Selected" before clicking on the Purge command button.

Purge Preparations

Make a backup of your TimeWizard database.

Create a subdirectory for each category of data that you will purge. The purge function creates a separate ASCII file for each affected database table every time you purge. TimeWizard names each file with the date, time, and table name. (With United States English operating systems, the file name format is ***mmddyy_hhmm_tablename***. With German or French operating systems, the file name format is ***ddmmyy_hhmm_tablename***.) Because different categories of data, such as activities or employees, affect some of the same tables, file names for purged data may be nearly identical. To avoid confusion, make separate subdirectories for each category of data.

Before purging data from the database, users of all TimeWizard applications connected to that database should exit the applications. The NetDynamics application that runs on the application server for TimeWizard.*enterprise* must be stopped prior to the purge.

Purging Data from your TimeWizard database ***(continued on page 61)***

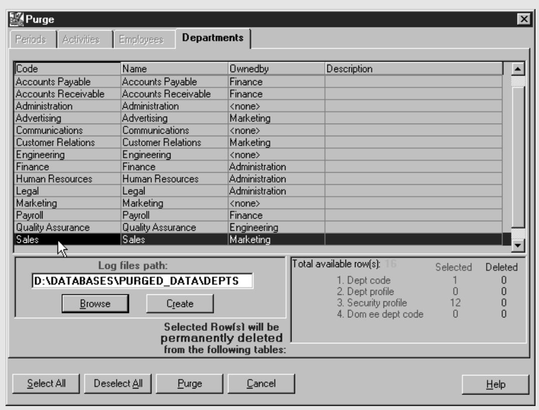


Figure 2.8

To purge data, follow these steps:

1. Select Purge from the TimeWizard Tools menu (Tools > Purge) to open the Purge window.
2. Click on the tab of the category of data you want to purge:
   - Periods
   - Activities
   - Employees
   - Departments

Purging Data from your TimeWizard database *(continued from page 60)*

3. Select the item(s) you want to purge by clicking on the desired row(s) in the upper frame.

   TIP To select multiple rows in sequence, click on the top row you want to select and press <Shift> + click on the bottom row you want to select. To select multiple rows not in sequence, click on the top row you want to select and press <Control> + click on each additional row you want to select.

   You can select all rows on the tab page by clicking on the Select All command button. This action will select rows that may become visible only by scrolling downward.

   A message displays on the bottom of the tab page to warn that "Selected Row(s) will be permanently deleted from the following tables."

4. To deselect rows, click on the Deselect All command button. You may now select another set of rows on this tab page, select a different tab page, or safely exit the Purge window.

5. In the Log Files Path text box, enter the directory path in which you want to store the ASCII files of purged data. To choose an existing path, click on the Browse button. To create a new path, type the path in the text box and then click on the Create button. A directory path must display in the Log Files Path box to complete the purge.

TIP To add a new subdirectory to an existing path, browse to select the path, type a backslash (\) and the new subdirectory name, and click on the Create button.

6. To complete the purge process, click on the Purge command button. A dialog box will open to ask whether you want to delete the selected rows permanently from the database. Click on Yes to complete the purge or No to return to the Purge window.

NOTE If you have an Oracle database, you cannot select more than 254 records at one time.

Summary

In this chapter you have learned the steps necessary to set up or upgrade your TimeWizard database and to purge data as necessary.

S E C T I O N   T W O

Customizing TimeWizard

TimeWizard and Top Hits

Consider TimeWizard as a jukebox that just arrived at your diner—without any music pre-installed. You have some decisions to make before your customers can enjoy it. First, you must decide what styles of music your customers want to hear—Rock, Country, Dance/Pop? Then, you must select specific song titles within each style of music—"Fly Away," by Lenny Kravitz; "That Don't Impress Me Much," by Shania Twain; or "It's Not Right But It's Okay," by Whitney Houston?

When you have finished adding the musical styles and selections, your jukebox becomes unique to your establishment, different from any other because of the choices made to please your specific customers.

This is not so different from the steps needed to customize TimeWizard for your company. TimeWizard in one company is different from TimeWizard in any other company, because each customer customizes the system to meet very specific needs.

First—just as you selected styles of music for the jukebox—you must decide what categories of information the system must capture. This is driven by the needs of your customers, or rather the departments in your company with which TimeWizard will share data. Such categories of information could be Projects and Subprojects for your Project Manager "customers," or Shift and Pay Code for your Payroll "customers."

Next, you must select specific values within each category. Just as each style of music needs songs to play on the jukebox, each category of information needs specific values to work in TimeWizard. Such values could be as simple as Shift designations (e.g., Shift 1, Shift 2, and Shift 3) for your Payroll "customers."

This section includes

Chapter 3: Defining TimeWizard Custom Fields
Chapter 4: Assigning Code Values to the Custom Fields

CHAPTER 3

Defining TimeWizard Custom Fields

TimeWizard is designed to integrate with a variety of other corporate systems—such as those used in Project Management, Accounting, Payroll, Information Services, and Billing departments. Custom fields define the broad categories of information that TimeWizard will capture and then share with the applications used by these other corporate departments.

Before you begin entering custom fields in to the TimeWizard system, you must be able to answer these questions:

- With what systems does your company want TimeWizard to interface, that is, what other software applications will share data with TimeWizard? Examples include project management applications such as Microsoft Project 98, Primavera P3, or Business Engine Project Server. Or ERP systems such as PeopleSoft, Baan, or SAP.
- What data do you need to capture in TimeWizard? Only the departments that use the other systems can answer this question. For example, project managers need project information such as how much time has been charged against a particular project. Human Resource managers need employee information such as how much sick leave a particular employee has used. Payroll managers need pay code information such as how much regular time or overtime an employee worked in a given week.

When you have consulted the appropriate department managers and have all the answers to the preceding questions, you can begin to set up TimeWizard custom fields.

Objectives

1. Navigate the Custom Fields window
2. Define activities fields
3. Define detail codes fields
4. Define employee fields

5. Apply default definitions to custom fields
6. Modify custom field data

Objective 1: Navigate the Custom Fields window

TimeWizard has three categories in which you can setup custom fields: Activities, Detail Codes, and Employees. In the Custom Fields window, each Custom Field category is represented as a tab. Table 3.1 explains the role of each category in TimeWizard. Table 3.2 explains the contents and options available in all of the Custom Field windows. Specific instructions concerning the setup procedures are explained in following objectives.

Navigating the Custom Fields window

To open the Custom Fields window, follow either of these steps:

1. Click on the Custom Fields icon.
2. Select Tools > Custom Fields from the TimeWizard main menu.

Figure 3.1

Table 3.1: Custom Field Category

Custom Field Category	Definition
Activity Fields	Activity Fields define what data comprises an activity in TimeWizard.
Detail Code Fields	Detail Code Fields specify what types of time an employee may apply to a timesheet transaction.
Employee Fields	Employee Fields specify what type of data is included in an employee's security record in TimeWizard.

Table 3.2: Custom Fields Window Contents

Custom Fields Window Contents	Definition
Caption	Caption identifies the name of the field as it appears on the timesheet, if you choose to display it (see "Display," below). Note: Changing the relationship between the caption and the data may affect the meaning of historical data.
Length	Length identifies the maximum length of data to be contained in that particular field.
Display	Display indicates whether or not you choose to have the data in that field displayed on the timesheet. There may be data you need to capture—possibly for reporting or interfacing with another system in your company—but do not need or want to display on the timesheet.
Quickfilter	The Quickfilter option enables more efficient data retrieval in other areas of TimeWizard. By selecting quickfilter for any given custom field, you tag the specific data within that field for quick retrieval later.
Timesheet Display	The Timesheet Display window at the bottom of the Activities Custom Fields window illustrates how your activities custom fields configuration appears on the timesheet. Only fields for which you enabled the Display option are shown in the Timesheet Display window (and consequently on the timesheet).
Negative Hour Rule	This detail code is used in certain circumstances in which the employee would need to charge against "negative hours." For example, as an employee uses accrued comp time, he or she could specify Negative Hour in the Detail Code section of the timesheet. Note: You can only assign this attribute to one detail code.

Objective 2: Define activities fields

You can identify key and non-key fields that define an activity in your TimeWizard system. The key fields define a unique record in the TimeWizard database. The non-key fields define additional data that you want to capture for each activity record.

NOTE: Each field may be defined to up to 255 characters.

Defining activities fields

To define activities fields, follow these steps:

1. Click on the Activities tab to open the Activities custom fields dialog box (Tools > Custom Fields > Activities).
2. Click the Caption text box and enter the name of the field.
3. Click on the Length text box and enter the desired maximum length of data the field is to contain in the timesheet.
4. Enable the display and quickfilter options for each key and non-key field as desired.
5. Click “Apply” to save the settings but remain in the Custom Fields window, or click “OK” to save the settings and exit the Custom Fields window.

The Timesheet Display window at the bottom of the Activities Custom Fields window illustrates how your activities custom fields configuration appears on the timesheet. *Only fields for which you enabled the Display option are shown in the Timesheet Display window (and consequently on the timesheet).*

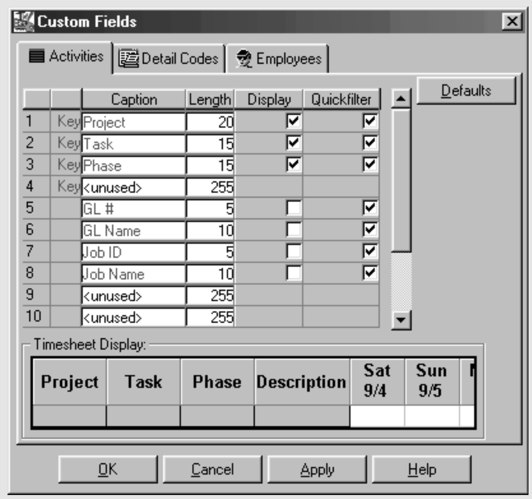


Figure 3.2

Example Figure 3.2 shows an example Activities dialog box in which we have defined three key activity fields named “Project,” “Task,” and “Phase.” In this example, we also entered four non-key activity fields named “GL#,” “GL Name,” “Job ID,” and “Job Name.” We enabled the display option for the key fields only. We enabled the quickfilter option for all fields.

Objective 3: Define detail codes fields

In this section, you define Detail Code fields that specify what types of time an employee may apply to a timesheet transaction. The Detail Codes Custom Field dialog box consists of ten fields for user-defined detail codes.

You must define at least one detail code custom field.

Defining detail codes fields

To define detail codes fields, follow these steps:

1. Click on the Detail Codes tab to open the Detail Codes Custom Field dialog box (Tools > Custom Fields > Detail Codes).
2. Click the Caption text box and enter the name of the code.
3. Click on the Length text box and enter the desired maximum length of data the code is to contain in the timesheet.
4. Click on “Apply” to save the settings but remain in the Custom Fields window, or click “OK” to save the settings and exit the Custom Fields window.

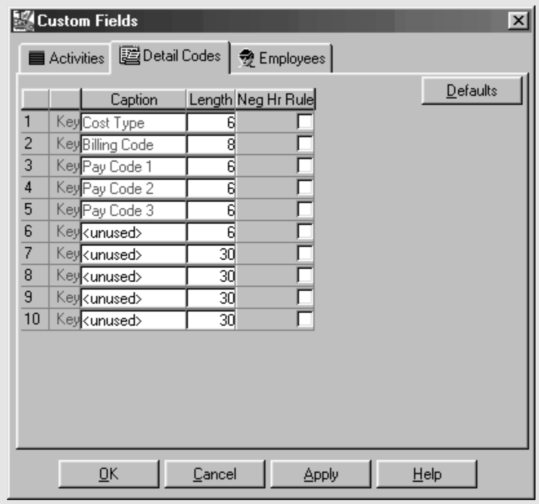


Figure 3.3

Example Figure 3.3 shows an example Detail Codes Custom Fields dialog box in which we defined detail code fields entitled “Cost Type,” “Billing Code,” and “Pay Code (1-3).”

Objective 4: Define employee fields

Employee fields and their associated values enable you to define the fields that make up an employee record in TimeWizard. There are four preset employee key fields:

- Resource Code
- Department Code
- Employee Code
- Salary Code

You also have the option of customizing eight non-key fields.

Defining employee fields

To set up employee fields, follow these steps:

1. Click on the Employees tab of the Custom Fields window.
2. For each of the preset key fields—Resource Code, Department Code, Employee Code, Salary Code—specify the length (see Table 3.1).
3. For the Department Code, Employee Code, Salary Code fields, specify whether or not you want to use the quickfilter option (see Table 3.1).
4. Click "Apply" to save the settings but remain in the Custom Fields window, or click "OK" to save the settings and exit the Custom Fields window.

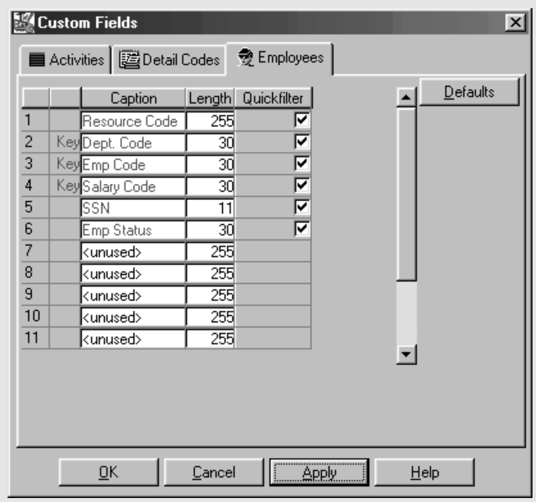


Figure 3.4

Example Figure 3.4 shows an example Employees custom field dialog box that contains the four predefined fields: Resource field, Department Code field, Employee Code Field, and Salary Code Field. In addition, we added two non-key fields: "SSN," and "Employee Status."

Objective 5: Apply default definitions to custom fields

At any time during the custom field definition process, you can revert to the default settings in any custom field row for any of the categories. On previously unused cells, the default setting is “<unused>.”

Applying defaults

To apply defaults, follow these steps:

1. Select the incorrect field.
2. Click the “Defaults” command button to open the Apply Defaults dialog box (see Figure 3.4).
3. Select your preference to apply defaults to current field, current row, or all rows.
4. Click “OK” to execute the Defaults command.

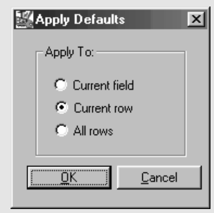


Figure 3.5

Objective 6: Modify custom field data

You should consider very carefully any modifications to your TimeWizard custom field definitions, because such modifications may affect the meaning of historical data (e.g., within current, closed or archived periods). If you alter the meaning of historical data, you possibly change data relationships throughout TimeWizard.

Modifying custom field data

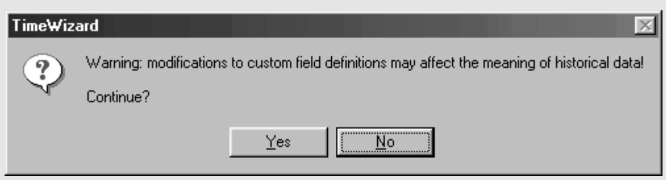


Figure 3.6

To modify custom field data, follow these steps:

1. Click on the custom field category tab that contains the data you want to change (i.e., the tabs for Activities, Detail Codes, or Employees).
2. Click the appropriate cell and overwrite its content as desired.
3. When you attempt to save the settings (“Apply” or “OK”), TimeWizard displays a warning to remind you of the ramifications of such modifications (see Figure 3.6).

If you do not want to save the changes:

Click “No” to return to the selected dialog box without saving the changes.

If you want to save the changes:

Click “Yes” to exit the TimeWizard warning dialog box.

4. Click “Apply” to save the settings but remain in the Custom Fields window, or click “OK” to save the settings and exit the Custom Fields window.

Summary

In this chapter, you have learned how to define the broad categories of information that TimeWizard will capture and then share with the applications used by these other corporate departments. In the next chapter, you learn how to add values to each TimeWizard custom field category.

CHAPTER 4

Assigning Code Values to the Custom Fields

In the introduction to this section, we compared TimeWizard to a jukebox—with the custom fields compared to musical styles and the code values compared to specific songs within each style. We also stated that the style and song selections are driven by the preferences of your customers. With that in mind, we suggested in Chapter 3 that you consult the appropriate department managers to review their needs. In this chapter, we show you how to put those decisions to work by adding code values to each TimeWizard custom field category—i.e., Activity, Detail Codes, and Employees. TimeWizard users (i.e., your company's employees) can then select those values on their timesheets to better define their transactions.

For example, if your company's Payroll managers needed TimeWizard to capture pay code information, you could have set up a detail code custom field entitled "Pay Codes." For TimeWizard to capture specific information within this custom field category, you could add specific pay code values, such as "regular time" or "overtime."

Objectives

1. Navigate the Code Values window
2. Assign activity code values to activity fields
3. Assign detail code values to detail code fields
4. Assign code values to employee code fields

4a. Assign employee code values to employee fields

4b. Assign salary code values to employee fields

4c. Assign resource code values to employee fields

5. Assign code values to DataBridge targets
6. Modify or delete code values

Objective 1: Navigate the Code Values window

The Custom Field categories—Activities, Detail Codes, and Employees—comprise the tabs in the upper Code Values window. As you click from one tab to another, the lower tabs represent key (preset or custom) and required fields associated with each Custom Field category. Table 4.1 explains each area of the Code Values window.

Navigating the Code Values window

To open the Code Values window, follow these steps:

1. Click the Code Values icon on the toolbar.
2. Select Tools > Code Values from the TimeWizard main menu.

Figure 4.1

Table 4.1: Code Value Fields

Code Value Fields	Explanation
Code	This field is required. TimeWizard uses the code for filtering and for applying the code value to transactions and activities. If the code value has been applied to any transactions or activities, the code cannot be changed.
Name	This field is required. TimeWizard uses the name for identifying the value. You may edit the field at any time.
Description	This field is not required. It is available for you to enter a full description of the code value, if necessary.

Objective 2: Assign activity code values to activity fields

Within each Activity field, you can assign specific values. You later will use unique combinations of these activity values to build unique activities.

NOTE

Once you use an activity code to build an activity, it can no longer be deleted.

Assigning activity code values to activity fields

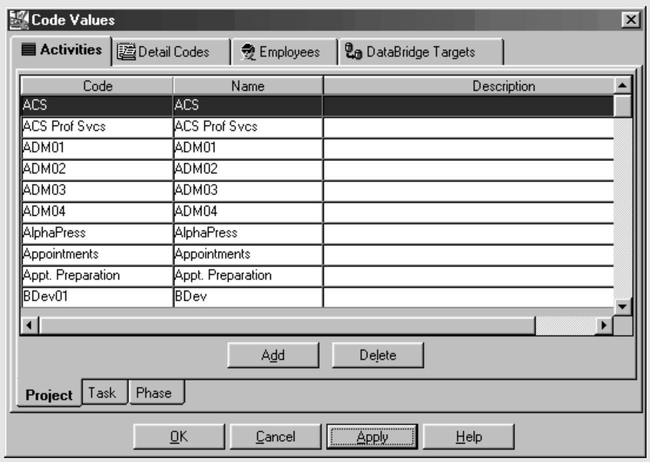


Figure 4.2

To assign activity code values to an activity field, follow these steps:

1. Click on the Activities category tab to open the Activities dialog box.
2. Click on the activity custom field tab for which you want to assign a value.
3. Click "Add."
4. Click on each blank text box to define the code values by typing the code, name, and description (if desired). The "code" and "name" are required fields for all code values. Once you have entered the code, click "Apply" (or press the tab key on your keyboard), and TimeWizard enters the name automatically.

Example In the example custom field definitions in Chapter 3, the example Activities Codes dialog box in Figure 4.2 contains custom fields for Project, Task, and Phase (displayed as the lower tabs). In this example, we assigned multiple code values for the Project field.

Objective 3: Assign detail code values to detail code fields

The code values that you assign to each Detail Code Custom Field category specify what types of data an employee may associate with a particular timesheet hours entry. For example, using multiple detail code values, an employee may divide a 10-hour work day into 8 hours of regular time and 2 hours of overtime.

NOTE Once you use a detail code in a business rule or timesheet transaction, it cannot be deleted.

Assigning detail code values to detail code fields

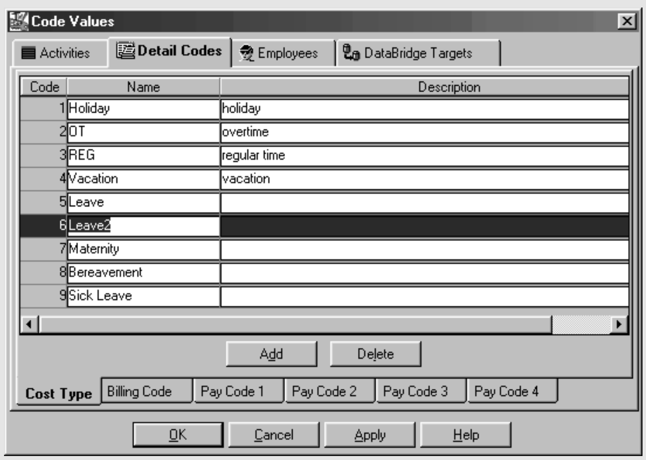


Figure 4.3

To assign detail code values to detail code fields, follow these steps:

1. Click on the Detail Codes category tab to open the Detail Codes dialog box.
2. Click on the detail codes custom field tab for which you want to assign a value.
3. Click "Add."
4. Click on each blank text box to define the code values by typing the code, name, and description (if desired).

Example Based on the example custom field definitions in Chapter 3, the example Detail Codes dialog box in Figure 4.3 contains custom fields for Cost Type, Billing Code, and Pay Codes 1-4 (displayed in the lower tabs). In this example, we assigned have assigned multiple code values for the Cost Type field.

Objective 4: Assign code values to employee code fields

The Employees tab of the Code Values window is comprised of three of the four preset employee key fields: Employee Code, Salary Code, and Resource Code. You complete the customization process for the Department field in the TimeWizard Administrator Departments window. Once you use an employee code in an employee record, it cannot be deleted.

Objective 4a: Assign employee code values to employee fields

Employee code values enable you to specify a unique designation for each employee. For example, you may use employee code values to designate whether an employee is full-time, part-time, or contract.

Assigning employee code values to employee fields

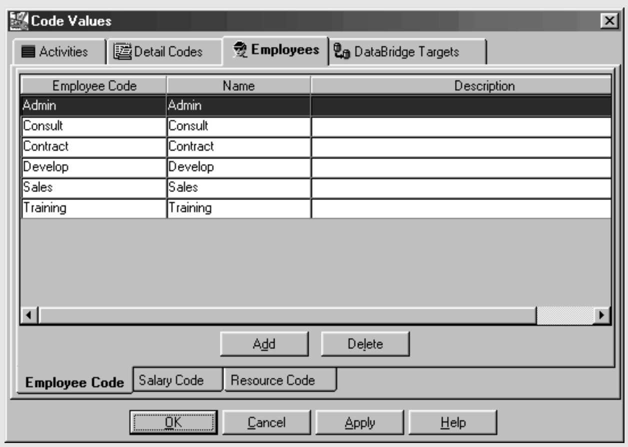


Figure 4.4

To assign employee code values to employee fields, follow these steps:

1. Click on the Employees tab (upper right) of the Custom Fields window.
2. Click on the Employees Code tab (lower left) of the Employees dialog box.
3. Click the Add command button to add an empty value text box.
4. For each new value, enter the employee code, name, and description (see Table 4.1).

Example Based on the example custom field definitions in Chapter 3, the example Employees dialog box in Figures 4.4 contains custom fields for Employee Code, Salary Code, and Resource Code (displayed in the lower tabs). In this example, we assigned multiple code values for the Employee Code field.

Objective 4b: Assign salary code values to employee fields

Salary code values enable you to specify a unique salary-level designation for each employee. For example, you may use salary code values to designate which labor rates are associated with an employee.

Assigning salary code values to employee fields

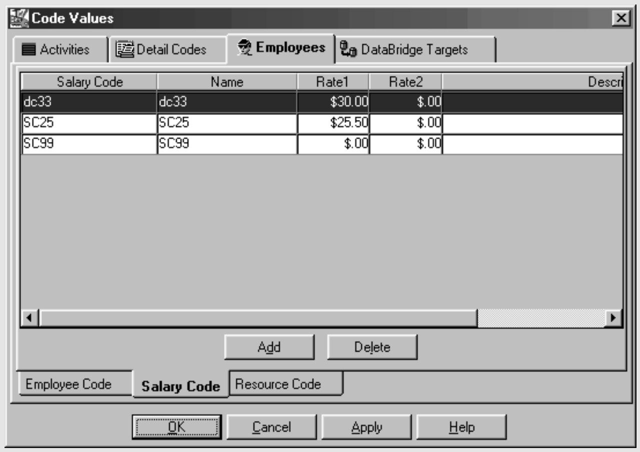


Figure 4.5

To assign salary code values to employee fields, follow these steps:

1. Click on the Employees tab (upper right) of the Custom Fields window.
2. Click on the Salary Code tab (lower middle) of the Employees dialog box.
3. Click the Add command button to add an empty value text box.
4. For each new value, enter the salary code, name, allowable rates, and description (see Table 4.1).

Example Based on the example custom field definitions in Chapter 3, the example Employees dialog box in Figures 4.5 contains custom fields for Employee Code, Salary Code, and Resource Code (displayed in the lower tabs). In this example, we assigned multiple code values for the Salary Code field.

Objective 4c: Assign resource code values to employee fields

Resource code values enable you to categorize your employee by specific talent designations. One employee may qualify for multiple resource codes. For example, you may use resource code values to assign an unclassified resource—e.g., any employee qualified to do the job—to an activity rather than assigning an individual employee.

Assigning resource code values to employee fields

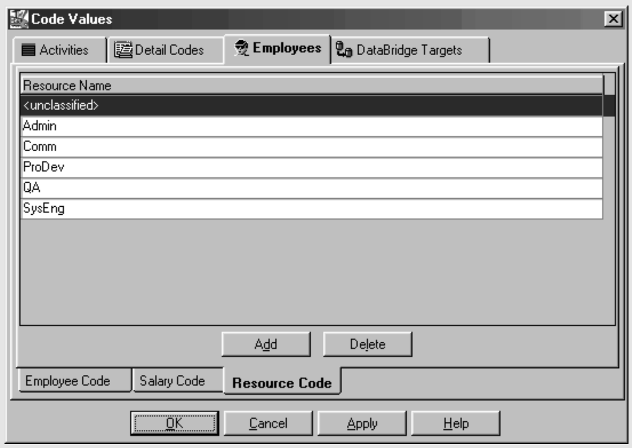


Figure 4.6

To assign resource code values to employee fields, follow these steps:

1. Click on the Employees tab (upper right) of the Custom Fields window.
2. Click on the Resource Code tab (lower right) of the Employees dialog box.
3. Click the Add command button to add an empty value text box.
4. For each new value, enter the resource name (see Table 4.1).

Example Based on the example custom field definitions in Chapter 3, the example Employees dialog box in Figures 4.6 contains custom fields for Employee Code, Salary Code, and Resource Code (displayed in the lower tabs). In this example, we assigned multiple code values for the Resource Code field.

Objective 5: Assign code values to DataBridge targets

A key feature of the TimeWizard software is that it enables you to run two-way exchanges of information—from TimeWizard into other corporate systems and from other corporate systems into TimeWizard. This feature reduces data entry (thereby reducing human error and increasing accuracy) and gets TimeWizard and all your departmental systems in synch. The bulk of interface setup and maintenance is explained in Section 7: Sharing TimeWizard Data with Other Systems; however, the first step is in the TimeWizard Code Values section.

Just as you have assigned functional values to other TimeWizard fields—Activities, Detail Codes, and Employees—you do the same for a new field introduced here: the DataBridge Target field. The values you assign to this area designate certain external systems as targets for regular DataBridge exports from TimeWizard.

NOTE: Once you use a DataBridge code to export data, it can no longer be deleted.

Assigning code values to export targets

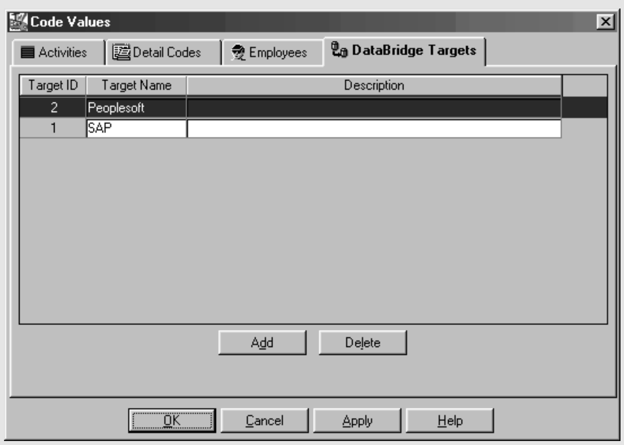


Figure 4.7

To assign code values to export targets, follow these steps:

1. Click on the Export Targets category tab to open the Export Targets dialog box.
2. Click "Add."
3. Click on each blank text box to define the export target code values by typing the target name and description (if desired). TimeWizard automatically generates the target ID.

Example The example DatabBridge Targets dialog box in Figure 4.7 contains two values that designate external systems Peoplesoft and SAP as targets for regular updates from TimeWizard. Now that we have identified these DataBridge targets to the TimeWizard system, we later will be able to continue the interface setup and maintenance in Section 7: Sharing TimeWizard Data with Other Systems.

Objective 6: Modify or delete code values

TimeWizard allows you to modify or delete code values as long as no activities, transactions, employees, or business rule profiles have been assigned to the values. If you attempt to modify or delete a value that has such associations, TimeWizard displays an error message explaining that it will not alter the value.

Modifying or deleting code values

To modify or delete code values, follow these steps:

1. Click on a custom field category to open the appropriate dialog box.
2. Click on the tab of the custom field for which you want to modify data (if necessary).
3. Click on the “name” or “description” field to select it.
4. Modify the information as needed:
   - Overwrite existing data.
   - Click “Delete.”

Summary

In this chapter, you have learned how to add functionality to each TimeWizard custom field category—i.e., Activity, Detail Codes, and Employees—by assigning specific code values. TimeWizard users (i.e., your company's employees) can then select those values on their timesheets to better define their transactions. In addition, you were introduced to TimeWizard's ability to run two-way exchanges of information and took the first steps toward setting up the interfaces by designating export targets.

SECTION THREE

3

Defining and Working in the Approval Process

Your employees enter detailed data in their timesheets, but how would you use the raw data? Timesheet data becomes the most useful when it is collected in defined batches, validated, and approved.

TimeWizard offers two types of approval process to help you gather time accounting information in the form best suited to your organization's needs. Because you must choose one of the two types before deploying TimeWizard, this section helps you understand the purpose of each.

You also must decide the length of time, in days, of each work period for which you want to collect and approve timesheet data. These periods of time, called "approval periods," do not need to be of uniform length.

First, this section will introduce you to the concepts behind approvals. Next, you will learn to set the approval process type and define approval periods in TimeWizard. Then, you will learn to view and edit employees' timesheets and to approve and reject timesheet data in your organization's approval process.

This section includes

Chapter Five: Selecting the Right Approval Process for Your Company
Chapter Six: Entering Approval Periods
Chapter Seven: Working in Your Employees' Timesheets
Chapter Eight: Approving and Rejecting Timesheets for Departments
Chapter Nine: Approving and Rejecting Timesheet Assignments

TimeWizard

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CHAPTER 5

Selecting the Right Approval Process for Your Company

Before you select an approval process and begin to set up approval periods in your TimeWizard database, you need to answer these questions from a company standpoint:

1. Who or what drives the approval process?
2. Which individuals should belong to selected approval hierarchies?
3. When or how often does your company need to lock data? (Locked data cannot be modified, except by authorized employees using an auditable correction process.)

We explore each question in the objectives of this chapter. Other sections and chapters of this guide discuss how you can customize and set up TimeWizard to gather valuable business data, but the decisions you make in this chapter control how all of that data is validated within your TimeWizard system, as well as in other corporate systems with which TimeWizard shares data.

Based on the answers to these questions, you will set TimeWizard to use one of the following two approval processes:

- Department approvals process (for exclusively department-oriented environments)
- Integrated approvals process (for activity-oriented or combination department/activity-oriented environments)

Once you have set the approval process, typical approval actions are as follows:

1. Employees enter time on their timesheets for the days within a defined approval period.
2. When timesheets are complete (i.e., all time and appropriate detail codes for the current approval period have been entered), the employees submit the timesheets for higher approval. (Department owners submit the timesheets of employees who

do not have the preference setting to submit them.) Submitting a timesheet locks the timesheet data.

3. Based on a global preference setting for the approval process type, authorized department owners, authorized project managers, or both approve or reject submitted timesheet data. Rejected data is unlocked so that it can be corrected and then resubmitted for approval.
4. Once all required approvals have been made, the information has been validated and is ready to be sent to other corporate systems (e.g., payroll, billing, or project management applications).

Objectives

1. Choose an approvals process
2. Decide which individuals should belong to selected approval hierarchies
3. Decide when or how often your company needs to lock data
4. Set TimeWizard Global Preferences

Objective 1: Choose an approvals process

Which of the following do you want to accomplish in your company?

- Tracking of employees' hours to help monitor departmental objectives
- Tracking of hours worked on specific activities to help manage projects

TimeWizard enables you to attain either or both of these goals.

In a department-driven environment, the approval process is guided primarily by the payment cycle of the company. Timesheet data must be validated and locked so that Payroll can cut the checks. In the department approvals process, an approver can approve or reject timesheet data for members of a particular department.

In an activity-driven environment, the approval process is guided primarily by the need for efficient project management. In the integrated approvals process, an approver can approve or reject timesheet data for employees with particular assignments. This is ideal for cross-functional project teams, whose team members may belong to different departments. You have the option of sending approved activity data to an external project management application. Locked actuals (i.e., actual starts, actual hours worked, actual finishes) can be retrieved automatically and compared with planned starts, hours, and finishes in the project management system.

In a combination environment, department managers and project managers both have a need to approve timesheet data. The integrated approvals process incorporates departmental approvals and activity approvals. You can send timesheet data that has been validated by both department managers and project managers to a project management system, to Payroll, and to other corporate systems.

In Objective 4, you will specify your approvals process selection in the TimeWizard Global Preferences dialog box.

Objective 2: Decide which individuals should belong to selected approval hierarchies

Establishing an approval hierarchy—that is, who approves the timesheets for each employee—encourages accountability and ensures that the timesheet data is validated before it is used for business purposes. For the timesheet approval "chain of command" to commence, the timesheet data must first be submitted for approval. In Chapter 16, "Setting Up Preferences," you will set a preference that determines whether timesheet owners can submit their own timesheets. If timesheet owners submit timesheets, individuals accept responsibility for their own timesheet entries. If timesheet owners cannot submit timesheets, then department owners must submit them. A submittal locks a timesheet against any impermissible alterations during the approval process.

In a department approvals process, the first person to approve the submitted timesheet could be a department manager or director and is the approver who validates the submitted timesheet data. If departments validate timesheet data so that it can be sent to Payroll, then the final approver—be that the second, third, or other approver—is fiduciary and accepts responsibility for the amount of the payroll in the payment cycle.

NOTE

If multiple approvals are required, each approval must occur at a successively higher department level in the TimeWizard department tree (see Chapter 10, "Setting Departmental Approval Definitions").

In an integrated approvals process, department approvals are followed by activity approvals. If your organization needs only activity approvals, the number of required department approvals can be set to "1." Then the timesheet submittal will fulfill the requirement for one department approval, and the timesheet will be available for activity approvals.

In the activity approvals portion of the process, only one approval is required per assignment. The timesheet submittal does not serve as an activity approval. An employee's timesheet may include multiple assignments, each under the supervision of a different activity approver. An activity approver may be authorized to approve multiple activities and the associated assignments. The approvers are project managers who are ultimately responsible for validating the hours accrued for a project.

Objective 3: Decide when or how often your company needs to lock data

The length of the approval cycle in a department-oriented environment often depends on your payroll cycle. The timesheet data must be approved, validated, and locked before the payroll process can continue. Consequently, whether your payroll is distributed on the 1st and 15th of the month, every two weeks, or monthly, the approval cycle should coincide with the payroll cycle.

The length of the approval cycle in an activity-oriented environment depends on how you use your project management system. You establish automated retrievals of actuals from TimeWizard to your project management application based on how up-to-date you require the actuals to be in your system. Complete the following statement: "Our project management reports must be accurate as of ..." Your answer—whether it is "one week," "two weeks," or any other span of time—defines the duration of your TimeWizard approval periods.

Your approval process may need to satisfy different needs for different departments. In a combination department/activity-oriented environment, the approval process still needs a hierarchy of accountability but requires a compromise between project reporting and payment cycles. One possible scenario is that of a company that distributes paychecks biweekly but must update its project management systems weekly. In this example, weekly approval periods would be set up. The project management system would be fed locked and approved data weekly, and the Payroll department could collect data every two weeks.

Objective 4: Set TimeWizard Global Preferences

After you choose either the department approvals process or the integrated approvals process, you specify your selection in the TimeWizard Global Preferences window. The window also includes other specifications that are discussed in Table 5.1.

Your selection of either the department approvals process or the integrated approvals process affects the entire approval process for your company's time accounting data. If you feel that you need to change your selection at a later date, we highly recommend that you make the change only when the following two conditions have been met:

1. All approval periods for which the old approvals process was used are closed.
2. No timesheets have been submitted for the approval periods for which the new approvals process will be used.

Meeting these conditions is necessary to protect the integrity of your data.

Table 5.1: Global Preferences

Global Preferences	Explanation
Close activities when all resource assignments are closed	A resource assignment combines an activity with a resource code. The resource code may restrict assignment of the activity to employees with a specific skill set. Selecting this option will cause an activity to close automatically when all of its associated resource assignments are closed. See Section 5 for more information.
Close resource assignments when all assignments are closed	A resource assignment that is assigned to a specific employee is called an employee assignment. Selecting this option will cause a resource assignment to close automatically when all of its associated employee assignments are closed. See Section 5 for more information.
Department Approvals	The department approvals process requires department approvers to approve or reject entire timesheets completed by employees within their departments. You must choose either "Department Approvals" or "Integrated Approvals."
Integrated Approvals	The integrated approvals process follows department approvals with activity approvals. The activity approvals portion of the process requires activity owners to approve or reject specified employee assignments. You must choose either "Department Approvals" or "Integrated Approvals."
Activity Display	If you selected "Integrated Approvals," this drop-down box enables you to select the activity field to display in the TimeWizard.*enterprise* activity approvals windows. First, define activities fields (see Chapter 3). Then select one of the first four fields from this drop-down list or select "Custom" to display a combination of the key fields.
Audit Time	After the specified audit time (in seconds) has elapsed, TimeWizard's Smart Audit feature creates an audit record in the database if an employee changes a saved timesheet entry. For example: The audit time is set at 600 seconds (i.e., 10 minutes). An employee saves a timesheet transaction on Monday. If the employee attempts to edit the transaction on Tuesday, an audit record will be saved in the database.

Setting TimeWizard Global Preferences

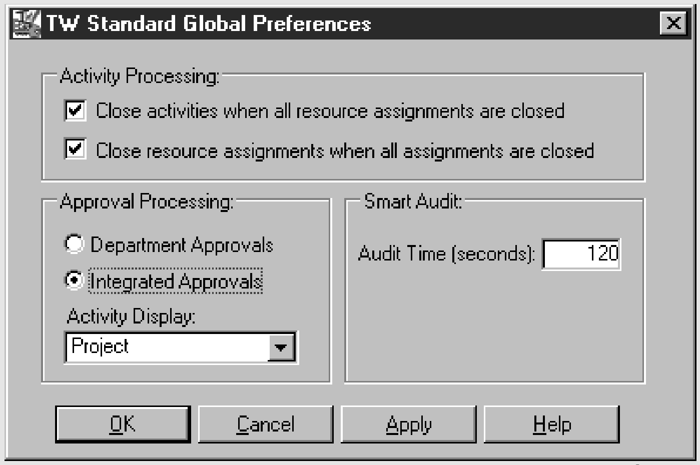


Figure 5.1

To set TimeWizard global preferences, follow these steps:

1. Click on the Global Preferences icon  or select Tools > Global Preferences from the main menu.
2. Specify whether you want TimeWizard to close activities when all associated resource assignments are closed.
3. Specify whether you want TimeWizard to close resource assignments when all associated employee assignments are closed.
4. Specify whether you want to use the department approvals process or the integrated approvals process.
5. If you specified Integrated Approvals in step 4 above, click on the Activity Display drop-down box and select how you want activities to display in the activity approvals windows of the Integrated Approvals area.
6. Enter the number of seconds you desire for the TimeWizard audit time.
7. Click on Apply to save the settings and remain in the dialog box or click on OK to save the settings and exit the dialog box

Summary

Now that you have been introduced to the TimeWizard approval processes, you should be better prepared to define an approvals process for your company. The deciding question is usually: Is your company driven by payroll deadlines, by project deadlines, or both? The department approvals process approves data associated with specific departments (usually at intervals coinciding with payroll periods). The integrated approvals process combines department approvals with approvals of data associated with specific activities (often used in project management).

The approval process type and approval hierarchy determine who approves the timesheet data. You have also been introduced to approval periods that determine when timesheet data is locked and becomes available for approval. In addition, you have learned to set TimeWizard Global Preferences.

In the next chapter, you will learn how to set up approval periods in TimeWizard. For more information about activities and assignments, see Section 5.

CHAPTER 6

Entering Approval Periods

In Chapter 5, what did you decide you wanted to accomplish in your company: To track employees' hours to help monitor departmental objectives, to track collective hours charged to specific activities to help manage projects, or both?

In addition, how often did you decide that your company needed to lock its timesheet data? If you chose a department-oriented approach, then the timesheet data must be approved, validated, and locked before the payroll process can continue. Consequently, whether your payroll is distributed on the 1st and 15th, every two weeks, or monthly, the approval period cycle should be concurrent. If you chose an activity-oriented approach, then the approval period cycle (i.e., the frequency in which you establish automated retrievals of actuals from TimeWizard to your project management system) depends on how up-to-date you require the actuals to be in that system. You can accomodate activity approvals or a combination of department and activity approvals by choosing the integrated approvals process.

Now that you understand the big picture of approval processes and have decided which approval process your company is going to use—either department approvals or integrated approvals—we can leave the process discussion for a moment and actually set up approval periods in your TimeWizard system. An approval period is the length of time, in days, during which your company wants to capture time accounting data. Once you have set up approval periods, TimeWizard can gather and lock timesheet data according to your approval process, making the timesheet entries available for approval and validation. When an approval period is closed, no more time may be charged to any timesheet in that period without an auditable correction process. Regardless of which approval process approach you have decided to take, the steps to set up and maintain an approval period are the same.

Objectives

When you have finished this chapter, you should be able to do the following:

1. Navigate the Approval Periods window
2. Set up a “standard” set of approval periods
3. Customize or maintain an approval period
4. Delete approval periods
5. Close-Out approval periods

Objective 1: Navigate the Approval Periods window

The Approval Periods window enables you to setup your approval period parameters, customize or enter sets of approval periods, and maintain your approval periods. Table 6.1 includes explanations of all areas and tools in the Approval Period window.

Opening the Approval Periods window

To open the Approval Period window, follow either of these steps:

1. Select Tools > Approval Periods from the TimeWizard Administrator main menu.
2. Click the Approval Period icon on the TimeWizard Administrator toolbar.

You can do the following in the Approval Period window:

- Define your company's approval periods (e.g., monthly, bi-weekly, or customized), using the Standard Periods area
- Setup “standard” sets of approval periods, using the Begin On/End For Year area
- Customize/maintain periods, using the Period Definition area (and the insert, delete, or add command buttons)
- Close-out approval periods

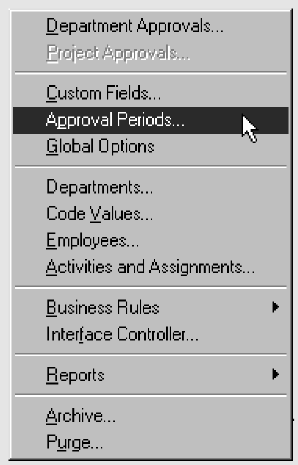


Table 6.1: Approvals Window Areas & Tools

Approvals Window Areas & Tools	Explanation
Standard Periods area	This area enables you to define the duration of your company's approval periods (e.g., monthly, bi-weekly, or customized) before generating them in TimeWizard.
Begin On/End For Year area	This area enables you to setup "standard" sets of approval periods.
Period Definition area	This area enables you to customize approval periods unique to your company (i.e., not a standard period).
Command Buttons	The top three command buttons enable you to insert, add, and delete single approval periods. The Close-Out command button enables you to close a selected approval period against any further timesheet transactions.

Objective 2: Set up a "standard" set of approval periods

The Standard Periods area and the "Begin On/End For Year" area of the Approval Periods window enable you to define your own approval periods based on commonly used cycles—i.e., 1st and 15th, every two weeks, etc. Once you set up approval periods based on these "standard" selections, you have the option of moving forward as-is or customizing your own unique cycle (see Objective 3).

If you know that the pattern of your approval periods will remain constant (e.g., 1st and 15th, every two weeks, etc.), you may find it convenient to produce approval periods for a full year or to the end of the current year. When you need to add additional approval periods beyond that point, select the last period and generate more on to the end.

Setting up a standard set of approval periods

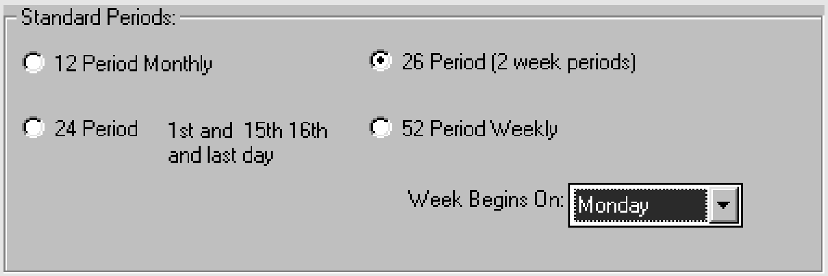


Figure 6.2

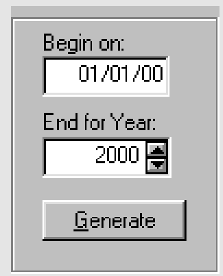


Figure 6.3

To set up a standard set of approval periods, follow these steps:

1. Go to the Standard Periods area of the Approval Periods window. (see Figure 8.2)
2. Click on the radio button that reflects your company's standard work period.
3. If you select either "26 Periods (two-week)" or "52 Periods (weekly)," a "Week Begins On:" drop-down box appears. (see Figure 8.3)
4. Select the first day of your company's standard work week.
5. Go to the "Begin On/End For Year" area of the Approval Periods window.
6. Enter the desired starting date in the "Begin On" text box.

   The begin date must match the day of the week indicated in the "Week Begins On" text box.

7. Select the year through which you want to setup an approval period in the "End For Year" data window.
8. Click on "Generate" to create your approval period (displayed in the Period Definition section).

Example Approval Period Window Figure 6.4 shows an example Approval Period window with a set of approval periods that begins on September 1, 1997 and ends on the last day of 2000. Each "Start Date/End Date" row reflects a single approval period (either the 1st to the 15th or the 16th to the last day of each month) within a 24-period annual cycle. For the closed periods, no more time may be charged to any timesheet without an auditable correction process.

NOTE: The date displays are shown based on the regional settings of your local hard drive (Control Panel > Regional Settings).

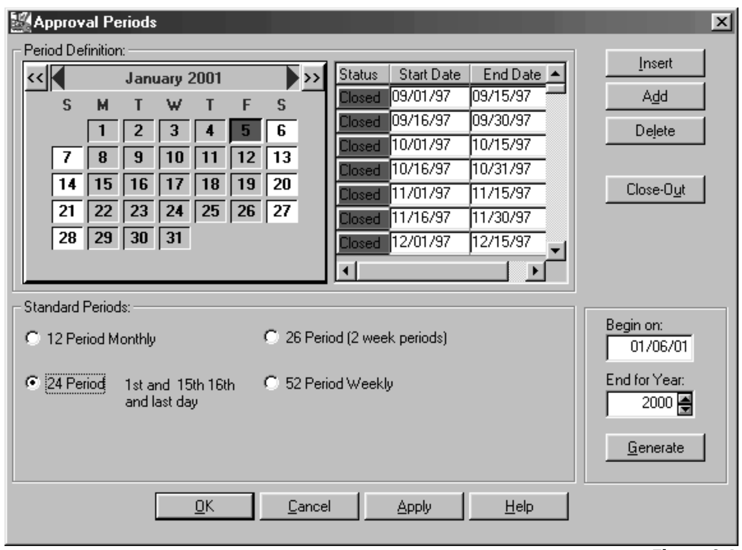
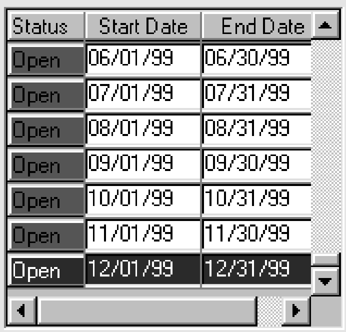


Figure 6.4

Objective 3: Customize or maintain an approval period

Since your company's accounting cycles may or may not fall within standard parameters such as the 1st and 15th of each month, TimeWizard gives you the flexibility to accommodate such exceptions. First, set up a standard approval period by following the steps described in Objective 2, then adjust the standard dates to fit your unique requirements.

Customizing or maintaining an approval period



Status	Start Date	End Date
Open	06/01/99	06/30/99
Open	07/01/99	07/31/99
Open	08/01/99	08/31/99
Open	09/01/99	09/30/99
Open	10/01/99	10/31/99
Open	11/01/99	11/30/99
Open	12/01/99	12/31/99

Figure 6.5

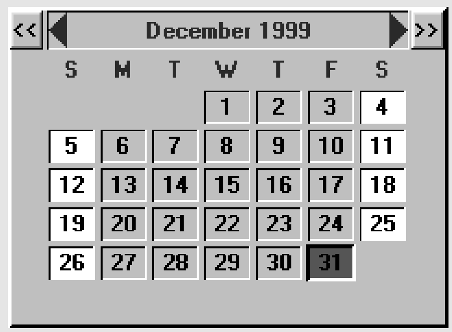


Figure 6.6

To customize or maintain an approval period, follow these steps:

1. Place the cursor on the specific start/end date text box and enter the date. TimeWizard automatically enters the slash marks ("/") in the date. Tab or click in the next date text box to continue entering dates. (See Figure 6.5)
2. Click "Apply" to save the settings and remain in the dialog box or "OK" to save the settings and exit the dialog box.
3. Click "Insert" to insert an approval period between existing start/end dates, or click "Add" to add approval periods to the end of all existing start/end dates.

You can refer to the calendar in the upper left of the window when customizing dates. Click the double arrows in the calendar to display another year. Click the single arrows to display another month. (See Figure 6.6)

Example TimeWizard customers who use weekly approval periods (i.e., either 26 or 52 Period) may have to create a custom period so that the last period of the calendar year ends on December 31—regrardless of how many days the period ends up containing.

NOTE You cannot edit a period's start date or end date after a timesheet transaction has been made for the period.

Exercise: You can change the approval period of March 1, 1997–March 15, 1997 to two single-week periods by following these steps:

1. Place the cursor on the March 15, 1997 text box immediately before the "15."
2. Type "08" to change the date to March 8, 1997.
3. Press the Tab key to move the cursor to the next row.
4. Click on the Insert command button to insert a new Start Date/End Date row between the March 8, 1997 end date and the cursor to account for the second single-week period.
5. Place the cursor on the undefined Start Date text box ("00/00/00").
6. Type "030997" to enter the date March 9, 1997.
7. Place the cursor on the undefined End Date text box ("00/00/00").
8. Type "031597" to enter the date March 15, 1997.

The approval period customization does not break the continuing flow from end dates to start dates. *In fact, TimeWizard does not allow gaps between end dates and start dates.*

NOTE If you manually enter an approval period that has gaps or inconsistencies—such as an end date prior to its start date—TimeWizard returns an error message when you attempt to save the approval periods.

Objective 4: Delete approval periods

If you create approval periods too far in advance (for example, you selected the wrong year in the End Date field), you can delete future approval periods from the Start Date/End Date table—as long as no timesheet transactions exist in the periods you want to delete. Simply, highlight the periods you want to delete and click on the Delete command button.

NOTE You cannot delete the approval period for the current period or for a closed period.

Objective 5: Close-Out approval periods

When an approval period is closed in TimeWizard, no more time may be entered or edited for any dates within that period, unless an auditable correction process is used. When you begin to close-out a period, TimeWizard checks whether all required timesheet approvals are in place. If all timesheet approvals have been made for the timesheets in the period, the period will close.

If any required timesheet approvals are missing, a window will open that enables you, as an Administrator, to override the need for additional approvals. To complete the close-out of the selected period, you must enter a reason for the override.

NOTE

Closing-out approvals is an irreversible process.

A closed period remains in the TimeWizard system, allowing you to make Historical Corrections to it, if you have the permission to do so. Historical Corrections modify the timesheet, but the TimeWizard database maintains the original data and the reason for the correction, as well as the corrective data. Closed periods can be deleted through the Purge process (see Chapter 2: Working with the Database).

Closing-out an approval period

To close-out an approval period, follow these steps:

1. Select the Start Date/End Date row for the period you want to close-out.
2. Click "Close-Out."
3. TimeWizard automatically closes-out the selected period or displays a closed period override window.
4. To close-out the period and override missing approvals, enter a standard or user-defined reason and specify "Yes" in the override window.

Summary

Now that you have learned how to set up standard approval periods in the TimeWizard system (or to customize approval periods to accommodate your company's nonstandard accounting cycles), your next step in the approval process is to define an approval hierarchy. This hierarchy of departments and subgroups determines who can approve timesheets in your company.

CHAPTER 7

Working in Your Employees' Timesheets

If you have the appropriate department owner permissions, you can view and edit the timesheets of employees in departments you own. TimeWizard requires you to leave a note explaining your reason for editing an employee's timesheet.

Objectives

1. View an employee's timesheet
2. Make an employee edit (and leave an employee edit note)

Objective 1: View an employee's timesheet

If you are designated as a department owner, you can view timesheets of employees in the department you own.

Viewing an employee's timesheet

To view an employee's timesheet, follow these steps:

1. In the Timesheet Status area, click on the View drop-down box to view the list of departments you own.
2. Select the department that contains the timesheets you want to view.
3. The timesheet of the first employee in that department appears in the Timesheet drop-down box.
4. To view a timesheet of another employee in the selected department, click on the Timesheet drop-down box. Select the employee who owns the timesheet you want to view.
5. Confirm that you are viewing the timesheet in the correct approval period. To view a timesheet for the selected employee in another period, select the desired period ending date from the Period End drop-down list.

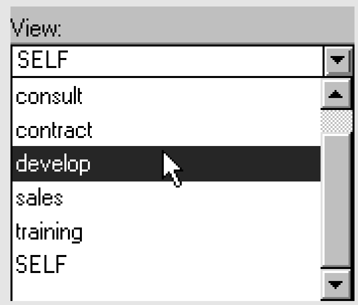


Figure 7.1

Objective 2: Make an employee edit (and leave an employee edit note)

If you have the appropriate department owner permission, you can edit the unapproved timesheets of employees in a department you own. TimeWizard requires users to note a reason for employee edits, i.e., edits of time or detail code values on another employee's timesheet. When viewing another employee's timesheet, the timesheet is locked into read-only mode until you leave an employee edit note. However, you may add, delete, close, or open an assignment on the timesheet without leaving a note.

The employee edit note is saved to the database and can be viewed in the timesheet transaction note window. In the client/server timesheet, a shaded timesheet cell indicates that an employee edit note (or other transaction note) exists. In the TimeWizard.*enterprise* timesheet, a Note Pad icon in the transaction cell indicates that an employee edit note (or other transaction note) exists. For additional information concerning timesheet notes, see the *TimeWizard User's Guide* or the *TimeWizard.enterprise User's Guide*.

NOTE

An employee edit note will replace a previous transaction note in the transaction note window. However, each note is preserved in the database.

Making an employee edit (and leaving an employee edit note)

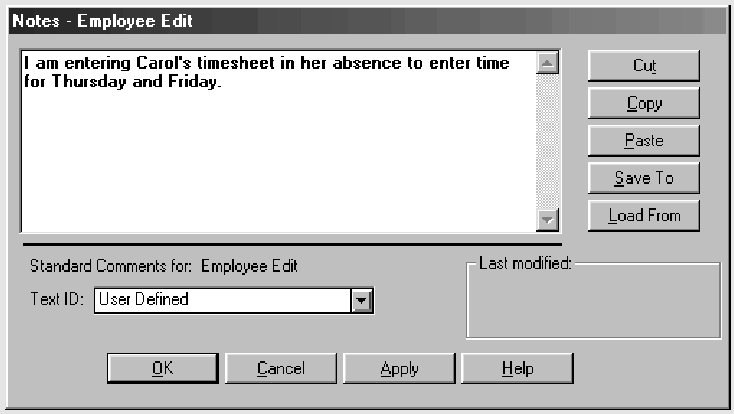


Figure 7.2

To make an employee edit, follow these steps:

1. Confirm that you are viewing the timesheet of the correct employee in the correct approval period. Follow the steps in Objective 1, as needed.
2. Click the Employee Edit icon (located to the right of the View drop-down) to open the Notes - Employee Edit window.
3. Click on the Text ID drop-down box and select a standard or user-defined note. The standard audit notes have pre-defined text. If you selected "User Defined," compose an original note in the text box.
4. When you have selected or composed the appropriate note, click "OK" to exit the dialog box and gain edit access to the employee timesheet. In the client/server timesheet, a shaded timesheet cell indicates the employee edit note. In the TimeWizard.*enterprise* timesheet, a Note Pad icon indicates the employee edit note.

Summary

In this chapter you have learned how to enter the timesheets of your departments' employees and make modifications, as necessary.

CHAPTER 8

Approving and Rejecting Timesheets for Departments

In the department-oriented approval process, a department manager is assigned approval authority for time submitted by employees in a specific department. A department owner is a manager who has permission to access timesheets of employees in the designated department. Some—but not necessarily all—department owners also have the departmental permission to approve and reject timesheets.

You define a department hierarchy in the TimeWizard Departments area and set the number of approvals required for employees in each department or approval unit (see Chapter 10, "Setting Departmental Approval Definitions"). The department hierarchy or department tree shows which departments "own" which other departments or approvals units.

The first level of the approval process is always the submittal of all time entries on an employee's timesheet for a particular period. If the employee has the Submit Timesheet preference setting, then the employee submits the timesheet for approval (see Chapter 16, "Setting Up Preferences"). If the employee does not have the preference, then the employee's department owner performs the submittal.

If one level of approval is required for the employee's department, then the submittal will fully approve the timesheet. If two levels of approval are required, then, following the submittal, one more approval will fully approve the timesheet. If additional levels of approval are required, then the timesheet must be approved at successively higher department levels to become fully approved.

If a department approver rejects the submitted hours or clears (i.e., deletes) an approval, the approval process begins again. The timesheet owner or department owner makes any needed corrections in the timesheet and resubmits it.

The Approval Status designation in the upper right of the timesheet displays the status of the timesheet at each level of the approval process. Table 8.1 explains each designation. (If you use the integrated approvals process, you can find additional information about the timesheet approval status in Table 9.2 of Chapter 9.)

Table 8.1: Timesheet Approval Status

Timesheet Approval Status	Explanation
Unapproved	The timesheet for the selected period has not been submitted for approval or the approvals have been cleared (i.e., deleted).
Pending	The timesheet for the selected period has been submitted for approval but not yet fully approved, and the timesheet has not been rejected.
Approved	The timesheet for the selected period is fully approved, i.e., it has all required approvals.
Rejected	The timesheet for the selected period has been submitted but has been rejected by a department approver. The timesheet owner (or department owner) should correct and re-submit the timesheet.

NOTE A timesheet with zero hours entered for a period will display in the Department Approvals window and require approval if an entry has been saved to an associated Special Amount or User field.

When timesheet hours are approved or rejected, the approval statement or rejection statement can be automatically e-mailed to the affected timesheet owner. To send such e-mail notification, the department approver must have the corresponding preferences Send E-Mail on Approve and Send E-Mail on Reject set in the approver's Preference Profile (see Chapter 16, "Setting Up Preferences").

E-mail notification also requires specific information to be entered in the timesheet owner's and department approver's Employee Detail windows. A user of the client/server timesheet must have the user's e-mail address (preferably a fully-qualified Internet e-mail address) in the Email Login text box of the Employee Detail window. A user of the TimeWizard.*enterprise* timesheet must have the user's fully-qualified Internet e-mail address in the Domain text box of the Employee Detail window. See Chapter 11, "Working with Employees," for more information about the Employee Detail window.

This chapter describes using the Department approvals window from the client/server timesheet. To use the Department Approvals window from the TimeWizard.*enterprise* timesheet, see the *TimeWizard.enterprise User's Guide*.

TimeWizard enables department owners with appropriate permission or approval authority, who are using the client/server timesheet, to do the following for timesheets in their department or sub-department:

- Display timesheets with pending approvals
- Approve or reject timesheets for entire departments or for specific employees
- Collect timesheets regardless of their approval status
- Take ownership of other departments or sub-departments
- Clear timesheet approvals for entire departments and sub-departments or for specific employees
- Check timesheet approval status for entire departments or for specific employees

Objectives:

1. Navigate the Department Approvals window
2. Check the Approvals Inbox for pending approvals
3. Show approval status for a department
4. Show approval history for an employee timesheet
5. Approve or reject timesheets for a department
6. Approve or reject timesheets for a single employee
7. Collect Timesheets
8. Take ownership of a department
9. Release ownership of a department
10. Clear approvals for a department
11. Clear approvals for a department and all sub-departments
12. Clear approval for a single employee

Objective 1: Navigate the Department Approvals window

The Department Approvals window displays your company's departmental hierarchy for timesheet approvals and all associated timesheets.

Opening the Department Approvals window

To open the Department Approvals window, follow either of these steps:

1. Click on the Department Approvals icon on the timesheet toolbar.
2. Select Tools > Department Approvals from the main menu.

Figure 8.1

In the Department Approvals window in Figure 8.2, we have selected the Systems Engineering Department in the top left frame, which requires the timesheet submit plus two approvals (for a total of three approvals). In the top right frame, all employee timesheets associated with the selected department are displayed. When you select an employee, his or her assignment and hours charged are displayed in the lower frames.

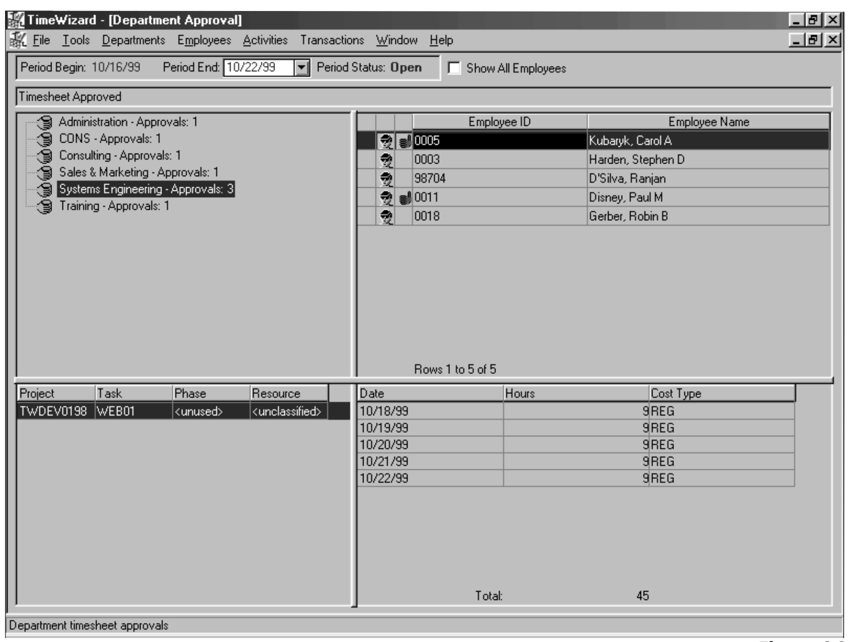


Figure 8.2

To expand or collapse the department hierarchy in the upper left frame, right click on a selected department and select Expand from the drop-down menu. Or click on the "+" or "-" symbols located to the left of the selected department name.

Objective 2: Check the Approvals Inbox for pending approvals

TimeWizard enables you to display a list of timesheets with pending approvals, grouped by approval period and approving department. This enables you to find the timesheets with pending approvals quickly and approve or reject them as needed.

Checking the Approvals Inbox for pending approvals

To check the Approvals Inbox for pending approvals, follow these steps:

1. In the Department Approvals window, select Department > Open Inbox to open the Pending Timesheet Approvals dialog box.
2. TimeWizard displays timesheets with pending approvals grouped by approval period and approving department.
3. To approve or reject the timesheets with pending approvals, click on the Period End drop-down menu to select the appropriate period ending date. Then in the top left box, select the department that contains the timesheets you wish to approve or reject.

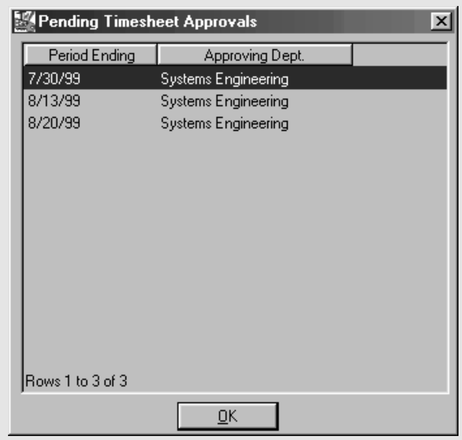
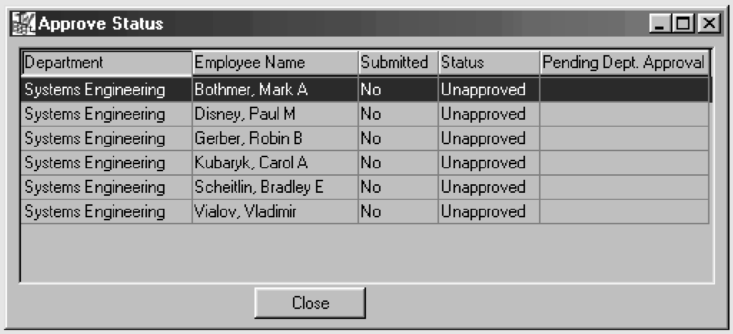


Figure 8.3

Objective 3: Show approval status for a department

For quick reference of where all of a department's timesheets are in the approval process, TimeWizard enables you to show timesheet approval status for the department en masse.

Showing approval status for a department



Department	Employee Name	Submitted	Status	Pending Dept. Approval
Systems Engineering	Bothmer, Mark A	No	Unapproved	
Systems Engineering	Disney, Paul M	No	Unapproved	
Systems Engineering	Gerber, Robin B	No	Unapproved	
Systems Engineering	Kubaryk, Carol A	No	Unapproved	
Systems Engineering	Scheitlin, Bradley E	No	Unapproved	
Systems Engineering	Vialov, Vladimir	No	Unapproved	

Figure 8.4

To show approval status for a department, follow these steps:

1. In the Department Approvals window, click on the Period End drop-down menu to select the appropriate period ending date.
2. In the upper left frame, select the department that contains the timesheets for which you want to show approval history. If the department contains subgroups or approval units, continue to open the departmental hierarchy until you have selected the appropriate departmental group.

NOTE: When you select the department in the upper left frame, all employees in upper right frame are selected automatically.

3. Right-click on the appropriate department and select Show Approval Status from the drop-down menu (Department > Show Approval Status) to open the Approve Status dialog box for the selected department.

When a department owner clears approvals (i.e., deletes approvals), the record in the Approve Status window displays "Reset" in the Status field.

Objective 4: Show approval history for an employee timesheet

For quick reference of where a specific employee timesheet is in the approval process, TimeWizard enables you to show the approval history of the selected timesheet.

Showing approval history for an employee timesheet

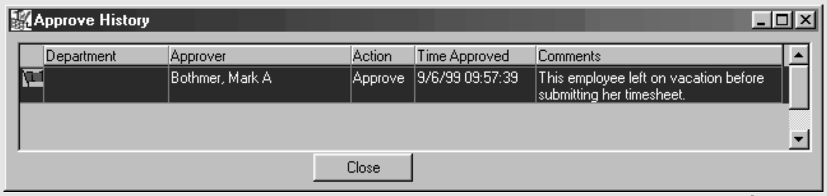


Figure 8.5

To show approval history for an employee timesheet, follow these steps:

1. In the Department Approvals window, click on the Period End drop-down menu to select the appropriate period ending date.
2. In the upper left frame, select the department that contains the timesheets for which you want to show approval history. If the department contains subgroups or approval units, continue to open the departmental hierarchy until you have selected the appropriate departmental group.
3. In the upper right frame, select the employee (within the selected department) who owns the timesheet for which you want to show approval history.
4. Right-click on the employee and select Show Approval History from the drop-down menu (Employees > Show Approval History) to open the Approve History dialog box for the selected timesheet.

NOTE

You may only show approval history for an employee timesheet if the timesheet is pending at your approval level.

When a department owner clears approvals (i.e., deletes approvals), the record in the Approve History window displays “Reset” in the Action field.

Objective 5: Approve or reject timesheets for a department

TimeWizard enables you to approve or reject the timesheets for a department en masse. Before proceeding with this function, however, be sure that you have reviewed each timesheet for accuracy.

Approving or rejecting timesheets for a department

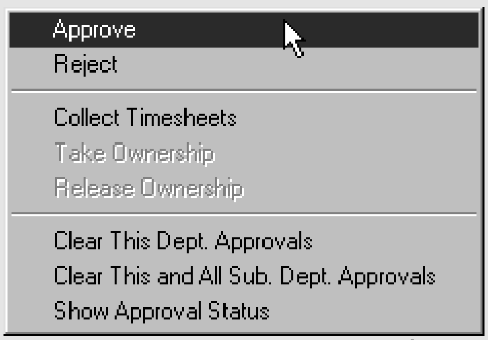


Figure 8.6

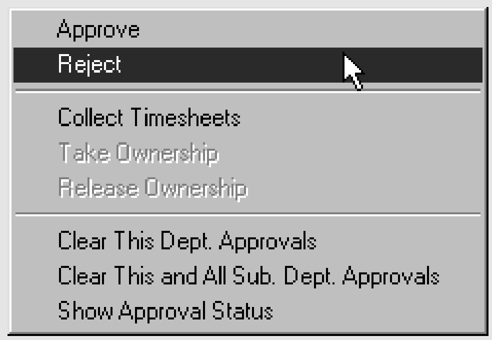


Figure 8.7

To approve or reject timesheets for a department, follow these steps:

1. In the Department Approvals window, click on the Period End drop-down menu to select the appropriate period ending date.
2. In the upper left frame, select the department that contains the timesheets you wish to approve or reject. If the department contains subgroups or approval units, continue to open the departmental hierarchy until you have selected the appropriate departmental group.

   NOTE: When you select the department in the upper left frame, all employees in upper right frame are selected automatically.
3. Right-click on the appropriate department and select Approve or Reject from the drop-down menu to approve or reject all timesheets associated with the selected department.
4. If you selected Approve, TimeWizard automatically approves all timesheets associated with the selected department and removes them from the employee list in the upper right frame (unless "Show all employees" is checked). If this is the final approval, the approval process is complete, and the timesheet owner is so notified via email (see introduction of this chapter for setup information). If higher approvals are required, the process continues to the next level.
5. If you selected Reject, TimeWizard opens a dialog box that requires you to specify a reason for the rejection. Select a standard note or enter an original note in the text box.
6. Click OK to continue. TimeWizard automatically rejects all timesheets associated with the selected department and removes them from the employee list in the upper right frame (unless "Show all employees" is checked). The rejected timesheet is returned to the timesheet owner for correction and re-submittal. The process then starts over.

Objective 6: Approve or reject timesheets for a single employee

TimeWizard enables you to select each employee's timesheet and approve or reject it independently of the other timesheets in the same department.

Approving or rejecting timesheets for a single employee

Figure 8.8

Figure 8.9

To approve or reject timesheets for a single employee, follow these steps:

1. In the Department Approvals window, click on the Period End drop-down menu to select the appropriate period ending date.
2. In the upper left frame, select the department that contains the timesheets you wish to approve or reject. If the department contains subgroups or approval units, continue to open the departmental hierarchy until you have selected the appropriate departmental group.
3. In the upper right frame, select the employee (within the selected department) who owns the timesheet you wish to approve or reject.
4. In the lower left frame, select the assignment for which you want to review transaction hours. The transaction hours associated with the selected assignment are populated in the lower right frame.
5. Right-click on the employee and select Approve or Reject from the drop-down menu to approve or reject the selected timesheet based on the accuracy of the assignment data.
6. If you selected Approve, TimeWizard automatically approves the timesheet and removes it from the employee list in the upper right frame (unless "Show all employees" is checked). If this is the final approval, the approval process is complete, and the timesheet owner is so notified via email (see introduction of this chapter for setup information). If higher approvals are required, the process continues to the next level.
7. If you selected Reject, TimeWizard opens a dialog box that requires you to specify a reason for the rejection. Select a standard note or enter an original note in the text box.
8. Click OK to continue. TimeWizard automatically rejects the timesheet and removes it from the employee list in the upper right frame (unless "Show all employees" is checked). The rejected timesheet is returned to the timesheet owner for correction and re-submittal. The process then starts over.

To select multiple employees in sequence: 1. Click on the top employee. 2. Hold down the Shift key. 3. Click on the bottom employee.

To select multiple employees not in sequence: 1. Click on one employee. 2. Hold down the Control key. 3. Click on an additional employee. 4. Continue to hold down the Control key and click on additional employees as needed

Example In the example TimeWizard Reject Timesheet dialog box shown in Figure 8.10, the timesheet was rejected because of unauthorized overtime. Once the timesheet owner corrects the transaction, the timesheet may be resubmitted and the approval process may begin again.

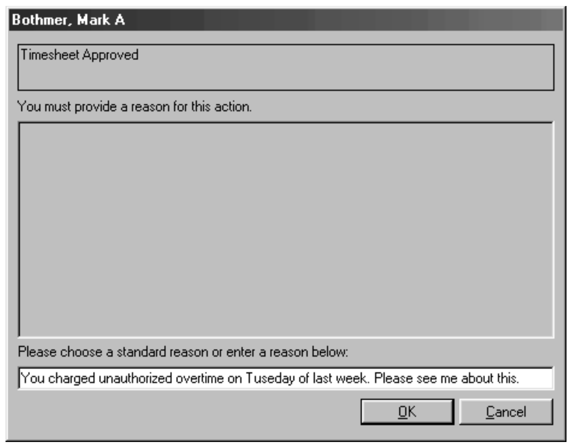


Figure 8.10

Objective 7: Collect Timesheets

TimeWizard enables you to forcibly collect timesheets from any level of department that you own. In fact, even if an employee has not yet submitted his or her timesheet or if any required lower-level approval has not yet been completed, you can take ownership of that approval level and forcibly collect the timesheets.

NOTE: You cannot collect timesheets for a future period.

Collecting timesheets

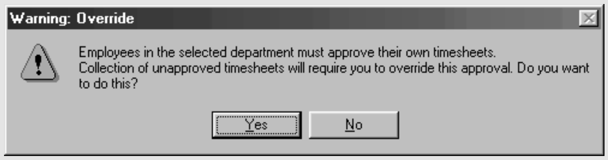


Figure 8.11

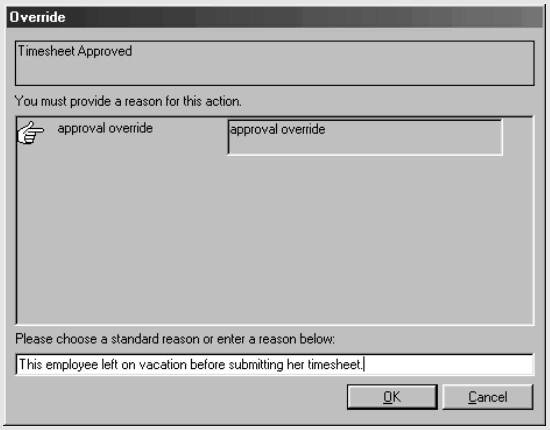


Figure 8.12

Figure 8.13

To collect timesheets, follow these steps:

1. In the Department Approvals window, click on the Period End drop-down menu to select the appropriate period ending date.
2. In the upper left frame, select the department that contains the timesheets you wish to approve or reject. If the department contains subgroups or approval units, continue to open the departmental hierarchy until you have selected the appropriate departmental group.

If you need to collect timesheets at a lower approval level, you must first take ownership of that level and then collect the timesheets. See Objective 6.

3. Right-click on the appropriate department and select Collect Timesheets from the drop-down menu (Department > Collect Timesheets) to open the Collect Timesheets Warning dialog box (Figure 8.11).
4. Click “Yes” to open the Override dialog box, in which you must provide a reason for this action.
5. Either select a standard note or enter an original note in the text box at the bottom of the Override dialog box (Figure 8.12).
6. Click OK to continue.
7. TimeWizard displays a confirmation dialog box with the number of timesheets collected (Figure 8.13). Click OK to return to the Department Approvals window.

Objective 8: Take ownership of a department

TimeWizard enables you to take temporary ownership of lower-level departments for the purpose of collecting timesheets or approving at that level in the absence of the department owner.

Taking ownership of a department

To take ownership of a department, follow these steps:

1. In the Department Approvals window, click on the Period End drop-down menu to select the appropriate period ending date.
2. In the upper left frame, select the department that contains the timesheets for which you want to take ownership. If the department contains subgroups or approval units, continue to open the departmental hierarchy until you have selected the appropriate departmental group.
3. Right-click on the appropriate department and select Take Ownership from the drop-down menu (Department > Take Ownership).

   NOTE: When you leave the Approvals window, TimeWizard automatically releases ownership of any departments for which you have taken ownership.
4. TimeWizard immediately grants you all approval permissions of a department owner for the selected department.

Objective 9: Release ownership of a department

TimeWizard enables you to release ownership of any departments for which you have taken ownership.

In addition, your temporary ownership is released automatically when you exit the Departments window.

Releasing ownership of a department

To release ownership of a department, follow these steps:

1. In the Department Approvals window, click on the Period End drop-down menu to select the appropriate period ending date.
2. In the upper left frame, select the department that contains the timesheets for which you want to release ownership. If the department contains subgroups or approval units, continue to open the departmental hierarchy until you have selected the appropriate departmental group.
3. Right-click on the appropriate department and select Release Ownership from the drop-down menu (Department > Release Ownership).

   NOTE: When you leave the Approvals window, TimeWizard automatically releases ownership of any departments for which you have taken ownership.
4. TimeWizard immediately returns ownership of the selected department to the original owner. You no longer have approval permissions of a department owner for the selected department.

Objective 10: Clear approvals for a department

TimeWizard enables you to clear timesheet approvals for a department en masse. This function does not allow you to clear an individual approval, rather it clears all approvals from the initial submit to the highest-level approval.

Clearing approvals for a department

Figure 8.14

To clear approvals for a department, follow these steps:

1. In the Department Approvals window, click on the Period End drop-down menu to select the appropriate period ending date.
2. Click the "Show all employees" box to specify (yes or no) to display all the employees in your department, those with pending and approved timesheets alike.
3. In the upper left frame, select the department that contains the timesheets for which you want to clear approvals. If the department contains subgroups or approval units, continue to open the departmental hierarchy until you have selected the appropriate departmental group.

NOTE: When you select the department in the upper left frame, all employees in the upper right frame are selected automatically.

4. Right-click on the appropriate department and select Clear This Department Approvals from the drop-down menu (Departments > Clear This Department Approvals) to clear all approvals for the selected department.

Objective 11: Clear approvals for a department and all sub-departments

TimeWizard enables you to clear timesheet approvals for a department and all associated sub-departments en masse. This function does not allow you to clear an individual approval, rather it clears all approvals from the initial submit to the highest-level approval.

Clearing approvals for a department and all sub-departments

Figure 8.15

To clear approvals for a department and all sub-departments, follow these steps:

1. In the Department Approvals window, click on the Period End drop-down menu to select the appropriate period ending date.
2. Click the "Show all employees" box to specify (yes or no) to display all the employees in your department, those with pending and approved timesheets alike.
3. In the upper left frame, select the department that contains the timesheets for which you want to clear approvals. For this function, you do not need to select specific subgroups or approval units.

NOTE: When you select the department in the upper left frame, all employees in upper right frame are selected automatically.

4. Right-click on the appropriate department and select Clear This and all Sub-Department Approvals from the drop-down menu (Departments > Clear This and all Sub-Department Approvals) to clear all approvals for the selected department and associated sub-departments.

Objective 12: Clear approval for a single employee

TimeWizard enables you to select each employee's timesheet and clear approvals independently of the other timesheets in the same department. This function does not allow you to clear an individual approval, rather it clears all approvals from the initial submit to the highest-level approval.

Clearing approval for a single employee

To clear approval for a single employee, follow these steps:

1. In the Department Approvals window, click on the Period End drop-down menu to select the appropriate period ending date.
2. Click the "Show all employees" box to specify (yes or no) to display all the employees in your department, those with pending and approved timesheets alike.
3. In the upper left frame, select the department that contains the timesheets for which you want to clear approvals. If the department contains subgroups or approval units, continue to open the departmental hierarchy until you have selected the appropriate departmental group.
4. In the upper right frame, select the employee (within the selected department) who owns the timesheet for which you want to clear approvals.

Figure 8.16

5. Right-click on the employee and select Clear Approvals from the drop-down menu to clear all approvals associated with the selected timesheet.

Summary

In this chapter, you have learned how to participate in your company's department-oriented approval process by approving or rejecting submitted timesheets in departments that you own.

CHAPTER 9

Approving and Rejecting Timesheet Assignments

In the integrated approvals process, department approvals are followed by activity approvals. A project manager is assigned approval authority for time submitted for a specific activity or activities. The activity approver, called an "activity owner," can approve or reject time for those "owned" activities without having approval authority for all of the time submitted for an employee. Unlike a department approver, an activity owner can approve time for employee assignments without owning the employee's department. If different assignments on one timesheet are owned by different activity owners, each activity owner will need to perform an approval or rejection.

Once a timesheet has received all required department approvals, it becomes available to the authorized activity owners for approval or rejection of activities or assignments. Only one approval is required for each employee assignment per period. When every assignment on a timesheet has been approved, the timesheet is fully approved for the period, and no other level of approval is required.

If an activity owner rejects the submitted hours or clears (i.e., resets) an approval, the approval process requires additional stages. The rejection or clearing action unlocks the timesheet so that the employee may correct the timesheet data. After the timesheet data has been modified, it must be resubmitted. Then the entire approvals process, beginning with department approvals, begins again.

If an activity approval is cleared or hours are rejected, but no modification is made to the timesheet data, the timesheet must still be resubmitted. In this case, the existing department approvals remain in place and activity approvals can continue.

After a timesheet has been submitted, an assignment status displays in the Status column at the left of the timesheet assignment rows to show the status of each assignment at each stage of the process. Table 9.1 explains each assignment approval status designation.

Table 9.1: Assignment Approval Status

Assignment Approval Status	Explanation
Pending	The employee assignment row for the selected period has been submitted for approval, and the activity owner has not yet approved this submission.
Approved	The submitted employee assignment row for the selected period has been approved by the activity owner.
Rejected	The submitted employee assignment row for the selected period has been rejected by the activity owner. The timesheet owner should correct the assignment row and then resubmit the timesheet.

The Approval Status designation in the upper right of the timesheet displays the status of the timesheet as a whole. Table 9.2 explains each timesheet approval status designation.

Table 9.2: Timesheet Approval Status

Timesheet Approval Status	Explanation
Unapproved	The timesheet for the selected period has not been submitted for approval or must be resubmitted for approval. If the timesheet has been submitted, at least one department approval or activity approval has been cleared (i.e., reset to "Unapproved"), and the timesheet is unlocked.
Pending	The timesheet for the selected period has been submitted for approval but not yet fully approved.
Approved	All assignments on the timesheet have been approved, and the timesheet is fully approved for the selected period.
Rejected	1) The timesheet for the selected period has been rejected by a department approver or 2) one or more assignments for the selected period have been rejected by an activity owner. The timesheet is unlocked and must be resubmitted. If timesheet data is modified before the resubmittal, the entire approvals process will begin again.

NOTE An assignment row with zero hours entered for a period will display in the Activity Approvals window and will require approval if an entry has been saved to an associated Special Amount or User field.

When timesheet hours are approved or rejected, the approval statement or rejection statement can be automatically e-mailed to the affected timesheet owner. To send such e-mail notification, the activity owner must have the corresponding preferences Send E-Mail on Approve and Send E-Mail on Reject set in the activity owner's Preference Profile (see Chapter 16, "Setting Up Preferences").

E-mail notification also requires specific information to be entered in the timesheet owner's and activity owner's Employee Detail windows. A user of the client/server timesheet must have the user's e-mail address (preferably a fully-qualified Internet e-mail address) in the Email Login text box of the Employee Detail window. A user of the TimeWizard.*enterprise* timesheet must have the user's fully-qualified Internet e-mail address in the Domain text box of the

Employee Detail window. See Chapter 11, "Working with Employees," for more information about the Employee Detail window.

This chapter describes using the Activity Approvals window from the client/server timesheet. To use the Activity Approvals window from the TimeWizard.*enterprise* timesheet, see the *TimeWizard.enterprise User's Guide*.

TimeWizard enables project managers with activity approval authority to perform the following functions:

- Display a list of activities that are available for approval
- Approve or reject submissions for entire activities, for specific resource assignments, or for specific employee assignments
- Clear approvals (i.e., delete approvals) for entire activities, for specific resource assignments, or for specific employee assignments
- Check approval status for entire activities or for specific employee assignments

Objectives:

1. Navigate the Activity Approvals window
2. Display activities available for approval
3. Show approval status of an activity
4. Show approval history of a single employee assignment
5. Approve or reject submissions for entire activities
6. Approve or reject submissions for specific resource assignments
7. Approve or reject submissions for specific employee assignments
8. Clear approvals for an activity
9. Clear approval for a single resource assignment
10. Clear approval for a single employee assignment

Objective 1: Navigate the Activity Approvals window

The Activity Approvals window displays your company's project hierarchy for activity approvals and all associated resource assignments.

Opening the Activity Approvals window

To open the Activity Approvals window, follow either of these steps:

1. Click on the Activity Approvals icon on the timesheet toolbar.
2. Select Tools > Activity Approvals from the main menu.

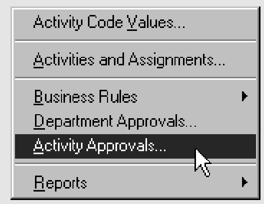


Figure 9.1

In the Activity Approvals window in Figure 9.2:

- The activity "TW3.0 Development, 11, Migration" in the upper left frame has two associated resource assignments in the upper right frame.
- The "SysEng" resource assignment in the upper right frame has two associated employee assignments in the lower left frame.
- The employee assignment for Bruce Gibson in the lower left frame has 12 hours charged to it in the selected period, as shown in the lower right frame.

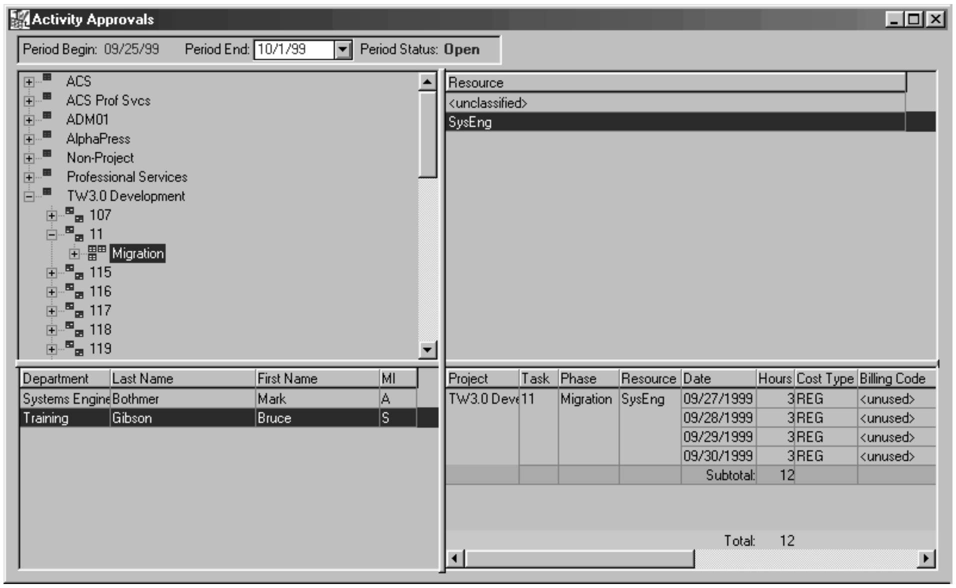


Figure 9.2

To expand or collapse the activity hierarchy in the upper left frame, right-click on a selected activity and select Expand from the pop-up menu or click on the "+" or "-" symbols located to the left of the selected activity name.

Objective 2: Display activities available for approval

TimeWizard enables you to display a list of activities available for approval, grouped by period ending date. An activity will not display until one or more of its associated employee assignments have received all required department approvals. This display enables you to find pending activity approvals quickly, and then proceed with approvals or rejections.

Displaying pending activity approvals

To display pending activity approvals, follow these steps:

1. In the Activity Approvals window, select Activity > Open Inbox from the main menu to open the Pending Activity Approvals dialog box.
2. TimeWizard displays activities available for activity approval, grouped by period ending date.
3. To proceed with the approvals process, click on the Period End drop-down box and select the appropriate period ending date.

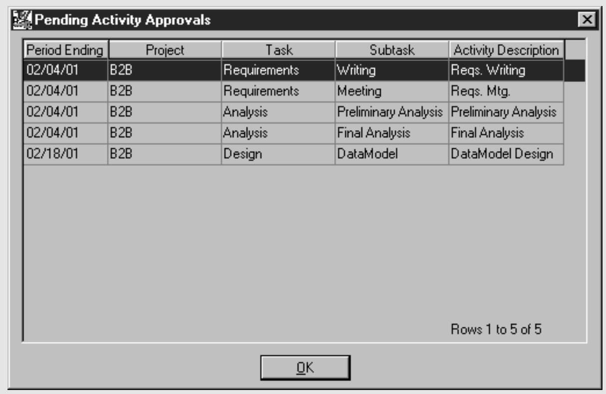
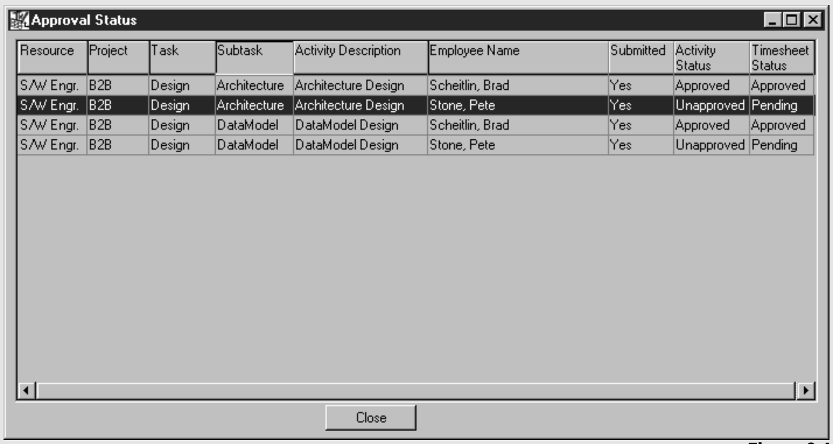


Figure 9.3

Objective 3: Show approval status of an activity

The Show Approval Status feature enables you to view the assignment approval status of submitted employee assignments associated with a specified activity, for a specified period, en masse.

Showing approval status for an activity


Approval Status

Resource	Project	Task	Subtask	Activity Description	Employee Name	Submitted	Activity Status	Timesheet Status
S/W Engr.	B2B	Design	Architecture	Architecture Design	Scheitlin, Brad	Yes	Approved	Approved
S/W Engr.	B2B	Design	Architecture	Architecture Design	Stone, Pete	Yes	Unapproved	Pending
S/W Engr.	B2B	Design	DataModel	DataModel Design	Scheitlin, Brad	Yes	Approved	Approved
S/W Engr.	B2B	Design	DataModel	DataModel Design	Stone, Pete	Yes	Unapproved	Pending

Figure 9.4

To show approval status for an activity, follow these steps:

1. In the Activity Approvals window, click on the Period End drop-down box and select the appropriate period ending date.
2. In the top left frame, select the activity that contains the appropriate resource assignment approvals. If the activity contains lower-level fields, continue to open the project hierarchy until you have selected the appropriate activity.

NOTE: When you select the activity in the left frame, all resource assignments in the right frame are selected automatically.

3. Right-click on the appropriate activity and select Show Approval Status from the pop-up menu (or select Activity > Show Approval Status from the main menu) to open the Approve Status window for the selected activity.

When approvals have been cleared (i.e., deleted), the record in the Approve Status window displays “Reset” in the appropriate status field.

Objective 4: Show approval history of a single employee assignment

TimeWizard enables you to show the assignment approval history for a specified employee assignment.

Showing approval status for a single employee assignment

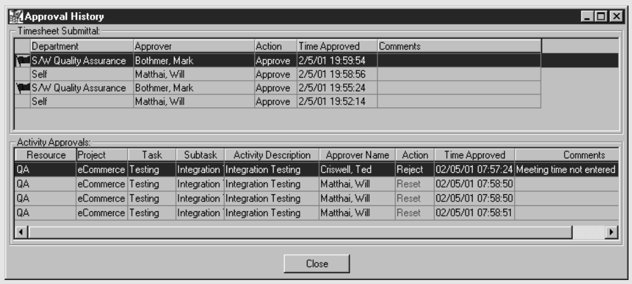


Figure 9.5

To show approval status for an employee assignment, follow these steps:

1. In the Activity Approvals window, click on the Period End drop-down box to select the appropriate period ending date.
2. In the upper left frame, select the activity that contains the resource assignment that contains the employee assignment for which you want to show the approval history. If the activity contains lower-level fields, continue to open the project hierarchy until you have selected the appropriate activity.
3. In the upper right frame, select the resource assignment that contains the employee assignment for which you want to show the approval history.

NOTE: When you select the resource assignment in the right frame, all associated employee assignments in the lower left frame are selected automatically.

4. In the lower left frame, right-click on the appropriate employee assignment and select Show Approval History from the pop-up menu (or select Employee > Show Approval History from the main menu) to open the Approve History window for the selected employee assignment.

When approvals have been cleared (i.e., deleted), the record in the Approve History window displays “Reset” in the appropriate action field.

Objective 5: Approve or reject submissions for entire activities

TimeWizard enables you to approve or reject the submissions for an activity en masse. When you approve or reject an activity, all associated resource assignments (and therefore employee assignments) are approved or rejected automatically. Before proceeding with this function, you may want to review resource assignments and employee assignments for accuracy.

Approving or rejecting submissions for entire activities

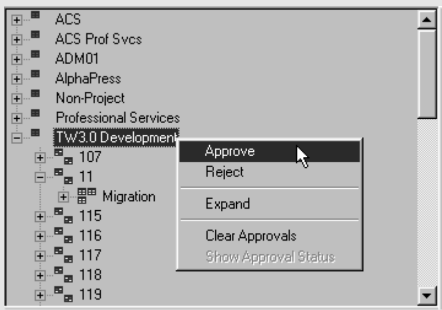


Figure 9.6

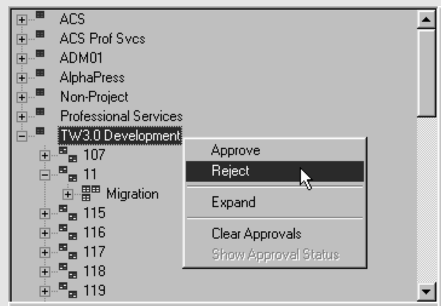


Figure 9.7

To approve or reject submissions for entire activities, follow these steps:

1. In the Activity Approvals window, click on the Period End drop-down box and select the appropriate period ending date.
2. In the upper left frame, select the activity that contains the resource assignments you wish to approve or reject. If the activity contains lower-level fields, continue to open the project hierarchy until you have selected the appropriate activity.

   NOTE When you select the activity in the upper left frame, all resource assignments in the upper right frame are selected automatically.
3. Right-click on the appropriate activity and select Approve or Reject from the pop-up menu to approve or reject all associated resource assignments.
4. If you selected Approve, TimeWizard automatically approves all resource assignments associated with the selected activity and removes them from the resource assignment list. You may approve or reject another submission or close the window.
5. If you selected Reject, TimeWizard opens a dialog box that requires you to specify a reason for the rejection. Select a standard note or enter an original note in the text box. Click OK to continue. TimeWizard automatically rejects all resource assignments associated with the selected activity and removes them from the resource assignment list.

Objective 6: Approve or reject submissions for specific resource assignments

TimeWizard enables you to select each resource assignment and approve or reject it independently of the other resource assignments associated with the same activity. When you approve or reject a resource assignment, all associated employee assignments are approved or rejected automatically. Before proceeding with this function, you may want to review each associated employee assignment for accuracy.

To select multiple resource assignments listed in sequence:

1. Click on the top resource assignment you want to select.
2. Hold down the Shift key and click on the bottom resource assignment you want to select.

To select multiple resource assignments not listed in sequence:

1. Click on one resource assignment you want to select.
2. Hold down the Control key and click on an additional resource assignment you want to select.
3. Continue to hold down the Control key and click on additional resource assignments as needed.

Approving or rejecting submissions for specific resource assignments

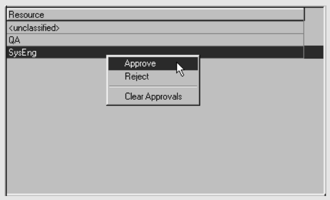


Figure 9.8

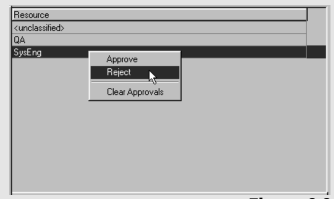


Figure 9.9

To approve or reject submissions for specific resource assignments, follow these steps:

1. In the Activity Approvals window, click on the Period End drop-down box to select the appropriate period ending date.
2. In the upper left frame, select the activity that contains the resource assignments you wish to approve or reject. If the activity contains lower-level fields, continue to open the project hierarchy until you have selected the appropriate activity.
3. In the upper right frame, right-click on the appropriate resource assignment, and select Approve or Reject from the pop-up menu to approve or reject the resource assignment.
4. If you selected Approve, TimeWizard automatically approves the resource assignment and removes it from the resource assignment list. You may approve or reject another submission or close the window.
5. If you selected Reject, TimeWizard opens a dialog box that requires you to specify a reason for the rejection. Select a standard note or enter an original note in the text box. Click OK to continue. TimeWizard automatically rejects the resource assignment and removes it from the resource assignment list.

Objective 7: Approve or reject submissions for specific employee assignments

TimeWizard enables you to select each employee assignment and approve or reject it independently of the other employee assignments associated with the same resource assignment.

Approving or rejecting submissions for specific resource assignments

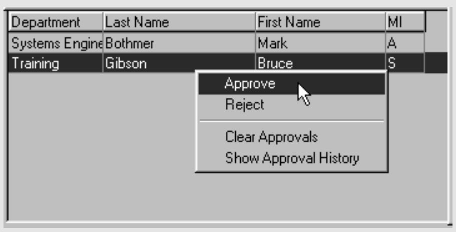


Figure 9.10

Figure 9.11

To approve or reject submissions for specific employee assignments, follow these steps:

1. In the Activity Approvals window, click on the Period End drop-down box and select the appropriate period ending date.
2. In the upper left frame, select the activity that contains the resource assignments that contain the employee assignments you wish to approve or reject. If the activity contains lower-level fields, continue to open the project hierarchy until you have selected the appropriate activity.

   NOTE When you select the activity in the left frame, all resource assignments in the right frame are selected automatically.
3. In the upper right frame, select the resource assignment that contains the employee assignments you wish to approve or reject.

   NOTE When you select the resource assignment in the right frame, all associated employee assignments in the lower left frame are selected automatically.
4. In the lower left frame, right-click on the appropriate employee assignment and select Approve or Reject from the pop-up menu to approve or reject the resource assignment.
5. If you selected Approve, TimeWizard automatically approves the employee assignment and removes it from the employee assignment list. You may approve or reject another submission or close the window.
6. If you selected Reject, TimeWizard opens a dialog box that requires you to specify a reason for the rejection. Select a standard note or enter an original note in the text box. Click OK to continue. TimeWizard automatically rejects the employee assignment and removes it from the employee assignment list.

To select multiple employee assignments listed in sequence:

1. Click on the top employee assignment you want to select.
2. Hold down the Shift key and click on the bottom employee assignment you want to select.

To select multiple employee assignments not listed in sequence:

1. Click on one employee assignment you want to select.
2. Hold down the Control key and click on an additional employee assignment.
3. Continue to hold down the Control key and click on additional employee assignments as needed.

Example In the TimeWizard Reject Timesheet dialog box shown in Figure 9.12, the employee assignment was rejected because of unauthorized use of a project code. Once the employee corrects the transaction and resubmits the timesheet, the employee assignment is placed in "Pending" status again. Department approvals must be completed again before the activity approval process may continue.

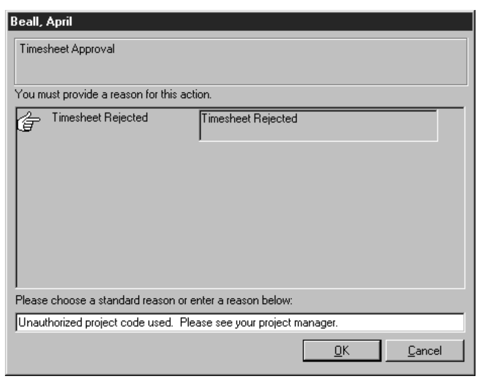


Figure 9.12

Objective 8: Clear approvals for an activity

If you have the Clear Approvals permission, you can reset approvals or rejections for an activity en masse. When you clear approvals for an activity, all approvals for associated resource assignments (and, therefore, employee assignments) are deleted automatically. An activity owner cannot clear the assignment status “Pending.”

TIP Department owners with the Clear Approvals permission may clear the assignment status “Pending,” as well as the timesheet approval status “Pending,” in the department approvals Clear Approvals window.

Clearing approvals for an activity

To clear approvals for an activity, follow these steps:

1. In the Activity Approvals window, click on the Period End drop-down box and select the appropriate period ending date.
2. In the upper left frame, select the activity that contains the resource assignment approvals you wish to clear. If the activity contains lower-level fields, continue to open the project hierarchy until you have selected the appropriate activity.

   NOTE When you select the activity in the upper left frame, all resource assignments in the upper right frame are selected automatically.

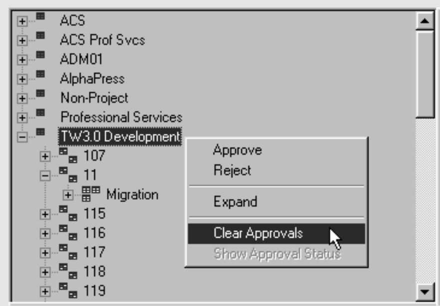


Figure 9.13

3. Right-click on the appropriate activity and select Clear Approvals from the pop-up menu to clear approvals for all associated resource assignments and employee assignments.

Objective 9: Clear approval for a single resource assignment

If you have the Clear Approvals permission, you can select a resource assignment and reset all associated approvals (or rejections) for it independently of the other resource assignments associated with the same activity. When you clear approvals for a resource assignment, all approvals for associated employee assignments are deleted automatically. An activity owner cannot clear the assignment status "Pending."

TIP: Department owners with the Clear Approvals permission may clear the assignment status "Pending," as well as the timesheet approval status "Pending," in the department approvals Clear Approvals window.

Clearing approval for a single resource assignment

To clear approvals for a resource assignment, follow these steps:

1. In the Activity Approvals window, click on the Period End drop-down box and select the appropriate period ending date.
2. In the upper left frame, select the activity that contains the resource assignment approvals you wish to clear. If the activity contains lower-level fields, continue to open the project hierarchy until you have selected the appropriate activity.
3. In the upper right frame, select the resource assignment that contains the approvals you wish to clear.

   NOTE: When you select the resource assignment in the upper right frame, all employee assignments in the lower left frame are selected automatically.

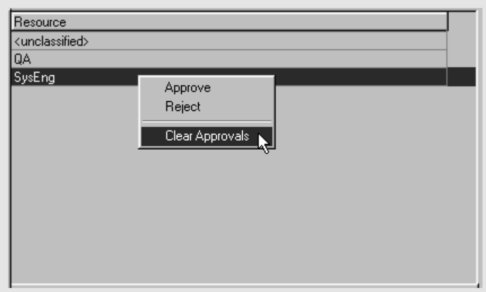


Figure 9.14

4. Right-click on the resource assignment and select Clear Approvals from the pop-up menu to clear the approvals associated with the selected resource assignment.

Objective 10: Clear approval for a single employee assignment

If you have the Clear Approvals permission, you can select an employee assignment and reset all associated approvals (or rejections) for it independently of the other employee assignments associated with the same resource assignment. An activity owner cannot clear the assignment status “Pending.”

TIP

Department owners with the Clear Approvals permission may clear the assignment status “Pending,” as well as the timesheet approval status “Pending,” in the department approvals Clear Approvals window.

Clearing approval for a single employee assignment

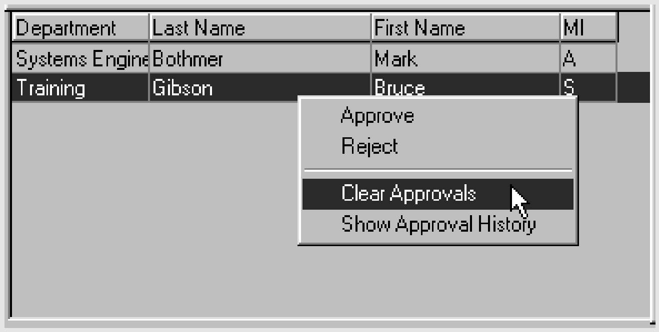


Figure 9.15

To clear approvals for an employee assignment, follow these steps:

1. In the Activity Approvals window, click on the Period End drop-down box and select the appropriate period ending date.
2. In the upper left frame, select the activity that contains the resource assignment that contains the employee assignment approvals you wish to clear. If the activity contains lower-level fields, continue to open the project hierarchy until you have selected the appropriate activity.
3. In the upper right frame, select the resource assignment that contains the employee assignment approvals you wish to clear.
4. In the lower left frame, right-click on the appropriate employee assignment and select Clear Approvals from the pop-up menu to clear the approvals for the selected employee assignment.

Summary

In this chapter, you have learned how to participate in the activity approvals portion of the integrated approvals process by approving or rejecting submitted timesheet data for activities you own.

S E C T I O N   F O U R

Managing Resources

Introduction to Managing Resources in TimeWizard

In the Introduction to this manual, we recalled seventh grade English and the six types of questions—who, what, when, where why and how. The answers to the question "Who is working?" lies in the TimeWizard Employees section, which enables you to add and manage the resources who are able to make time entries in the TimeWizard system. For each resource, you complete an employee record that encompasses everything TimeWizard needs to know about that user. This includes not only standard data such as name and employee number but also TimeWizard-specific data such as departmental ownership settings and resource code designations.

This section includes the following

Chapter Ten: Setting Departmental Approval Definitions
Chapter Eleven: Working with Employees

CHAPTER 10

Setting Departmental Approval Definitions

In Chapter 5, we discussed the different types of approval process and the implications of each. In Chapter 6, you learned how to set up standard or customized approval periods so that your company's employees can enter time within those periods. In this chapter, we discuss the final step of setting up the department portion of the approval process. You do this by establishing an approval hierarchy of departments, subgroups, and associated employees. Table 10.1 explains the role of each member of the approval hierarchy.

NOTE If you choose the integrated approvals process, you will also need to map out who approves which assignment time entries. You will set activity approvers for this purpose in the Activity Approval Pools area (see Chapter 18, "Creating Activity Approval Pools").

Objectives

When you have finished this chapter, you should be able to do the following:

1. Navigate the Departments window
2. Create an approval hierarchy
3. Place employees in the appropriate departments and subgroups
4. Edit departments and subgroups in an approval hierarchy
5. Delete departments and employees from an approval hierarchy
6. Cut and paste departments and employees
7. Maintain employees in the Departments window

Table 10.1: Approval Hierarchy Members

Approval Hierarchy Members	Role in the Approval Process
Highest-level member of the approval hierarchy	The highest-level member of the approval hierarchy is merely a place holder that signifies the highest-level office in your company (the name of which could be your company name). This member does not participate in the approval process but serves to connect all of the approval departments.
Departments	The approval departments in the approval hierarchy represent your company's departments (e.g., Payroll, Human Resources, Marketing, and Administration). If you define subgroups, the approval department is responsible for approving the timesheet data previously approved by the subgroups.
Subgroups	The approval subgroups in the approval hierarchy represent smaller divisions within your company's departments (e.g., Public Relations and Advertising within the Marketing Department). If you define approval units, the approval subgroup is responsible for approving the timesheet data previously approved by the approval units.
Approval Units	Approval units are the lowest possible level of the approval hierarchy. You can define approval units to break up larger approval subgroups.
Employees	Employees who have the Submit Timesheet preference start the approval process by submitting their own timesheets for the next level of approval. Department owners submit timesheets for employees who do not have the Submit Timesheet preference.

Objective 1: Navigate the Departments window

The Departments window enables you to define departments in the TimeWizard system and to establish a hierarchy of approvals. You can then assign employees to the appropriate departments.

Opening the Departments window

To open the Departments window, follow either of these steps:

1. Select Tools > Departments from the TimeWizard Administrator main menu.
2. Click on the Departments icon on the TimeWizard Administrator toolbar.

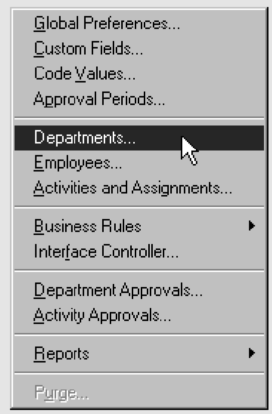


Figure 10.1

Objective 2: Create an approval hierarchy

An approval hierarchy is like an organizational chart that illustrates who works for whom in your company. For example, your highest level of the hierarchy could be called "Executive Office," followed by the primary departments of your company (such as Business Development, Information Technology, and Payroll). Each primary department may include several subgroups (such as Administration, Consulting, and Help Desk). If a subgroup is large, you can divide it into approval units, the lowest possible level of the approval hierarchy.

If your organization wants to use the activity approval portion of the integrated approvals process, but chooses not to use the department approval portion, set the number of approvals for each department to "1." When a timesheet is submitted for approval, the submittal acts as the first departmental approval. If only one department approval is required, the submittal makes the timesheet accessible to activity approvers.

Creating an approval hierarchy

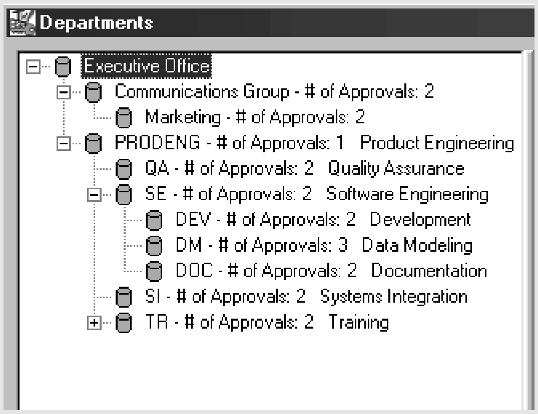


Figure 10.2

Figure 10.3

To create an approval hierarchy, follow these steps:

1. Right-click on the default department entitled "Begin Department Hierarchy Here" to access the Departments tools menu. Select "Edit"and rename the default department as appropriate (i.e., your company's highest level department).
2. Right-click on the default department to access the Departments tools menu.
3. Select "Add" to open the Department dialog box.
4. For the new department, enter the appropriate information, such as department name and number of department approvals required. The first approval is the submittal of the timesheet.
5. To add additional departments, repeat step 2-4.
6. To add subgroups that are approved by a particular department, right-click on the specific department and repeat step 3. Enter the appropriate information in the dialog box.
7. To designate a subgroup as an approval unit, click on the "Approval Unit Only" checkbox in the dialog box.
8. Click "Apply" to save the settings and keep the dialog box open, or click "OK" to save the settings and close it.

A drum-shaped icon appears to the left of each department or subgroup in the Departments window (see Figure 10.2). Approval units will have an icon that shows a smaller drum beside the larger one, indicating a "parent-child" relationship.

TIP

To open or collapse the approval hierarchy, either click on the plus (+) or minus (-) symbols to the left of each department or double-click on the department.

Objective 3: Place employees in the appropriate departments and subgroups

When you place employees into a specific department or subgroup, they are bound by the approval settings of the department or subgroup. Just as the department approval hierarchy reflects the departmental structure of your company, the employee placements reflect the day-to-day organization of your company's resources.

Placing employees in the appropriate departments and subgroups

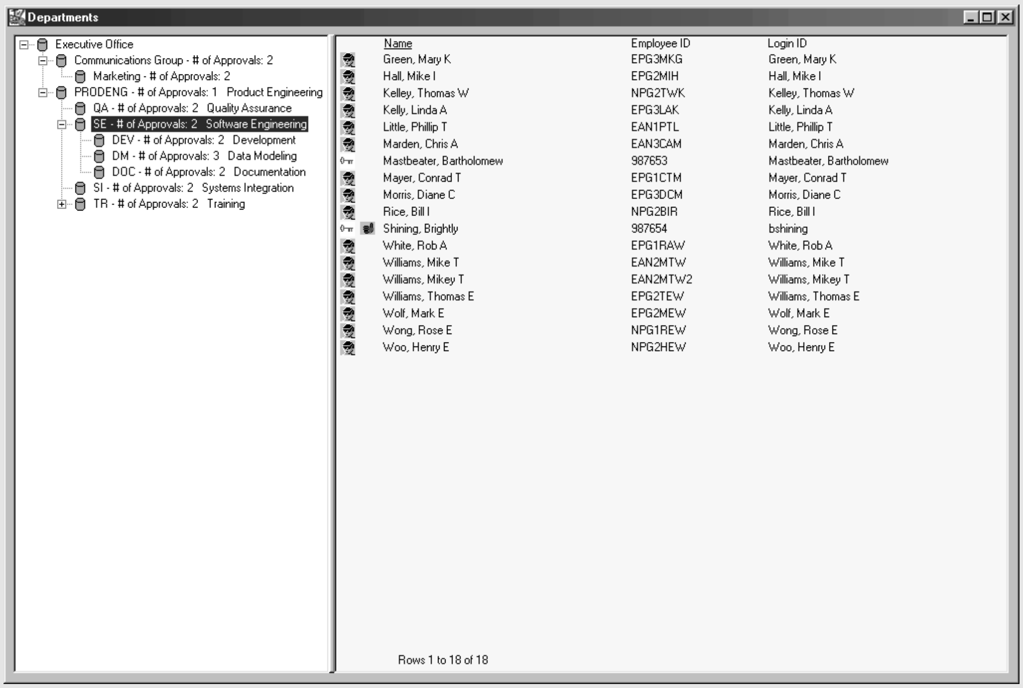


Figure 10.4

To place employees in the appropriate departments and subgroups, follow these steps:

1. Click on the default department (the highest level department). All employees already in the TimeWizard system are displayed in the right frame of the Departments window.
2. Click and hold on the employee you want to place in another department or subgroup.
3. Drag the selected employee from the default department onto the appropriate department or subgroup.

Objective 4: Edit departments and subgroups in an approval hierarchy

TimeWizard enables you to edit departments and subgroups in the approval hierarchy at any time.

Editing departments and subgroups in an approval hierarchy

To edit departments and subgroups, follow these steps:

1. Right click on the department or subgroup you want to edit.
2. Select Edit from the drop-down menu to open the Department dialog box.
3. Edit the settings as necessary.

   NOTE: You cannot edit the Department Code.
4. Click Apply to save the settings and remain in the dialog box or OK to save the settings and return to the Departments window.

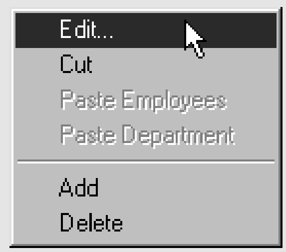


Figure 10.5

Objective 5: Delete departments and employees from an approval hierarchy

You can only delete lowest-level departments or subgroups (i.e., ones that have no child subgroup beneath it) that contain no employees. To delete a department that has subgroups as well as employees, you first must move its position in the approval hierarchy (to a lowest-level position) and move all of its employee members to a new location.

You cannot delete an employee who has timesheet transactions in any period (open or closed).

Deleting Departments and Employees from an Approval Hierarchy

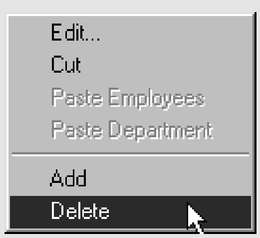


Figure 10.6

Figure 10.7

To delete departments and employees from an approval hierarchy, follow these steps:

1. Right click on the subject of your choice.
2. Select Delete from the drop-down menu.
3. In the Delete dialog box, click Yes to delete the department or employee.

Objective 6: Cut and paste departments and employees

You can cut departments and paste them into a new position in the approval hierarchy (e.g., as a subgroup to another department), and you can cut employees and paste them into a new department or subgroup.

You also can click and drag departments and employees for the same results as cutting and pasting.

To select multiple employees in sequence: 1. Click on the top employee. 2. Hold down the Shift key. 3. Click on the bottom employee.

To select multiple employees not in sequence: 1. Click on one employee. 2. Hold down the Control key. 3. Click on an additional employee. 4. Continue to hold down the Control key and click on additional employees as needed.

Cutting and pasting departments and employees

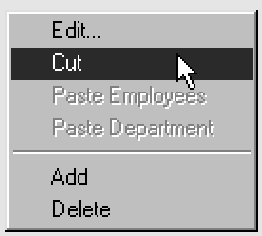


Figure 10.8

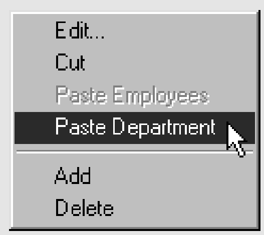


Figure 10.9

To cut and paste departments and employees, follow these steps:

1. Right click on the subject of your choice.
2. Select Cut from the drop-down menu.
3. Right-click on the appropriate destination.
4. Select "Paste Employees" or "Paste Department" as appropriate.

Objective 7: Maintain employees in the Departments window

For convenient management of your company's employees and departments, TimeWizard enables you to access certain dialog boxes associated with the TimeWizard Employees window by right-clicking on any listed employee. These dialog boxes include:

- The Employee Detail dialog box
- The Departments Owned dialog box
- The Resource Codes dialog box.

For complete instructions on using these TimeWizard dialog boxes and associated functions, see Chapter 11, "Working with Employees."

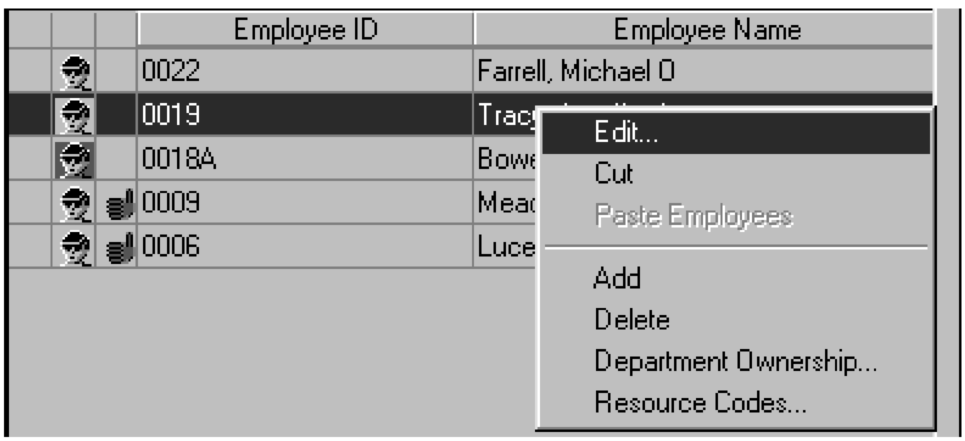


Figure 10.10

Summary

By creating a hierarchy of departments, you continue the definition of the approval process for your company. You will assign departmental approval authority to specific employees in Chapter 11, "Working with Employees." If you choose the integrated approvals process, you will set activity approvers in Chapter 18, "Creating Activity Approval Pools."

CHAPTER 11

Working with Employees

The Employees section is your one-stop section for setting up and maintaining your resources in the TimeWizard system. In this chapter, we will discuss how to create, access, and maintain new employee records; set department-level permissions; and assign resource settings to individual employees.

In other areas of TimeWizard—e.g., Business Rules, Activities and Assignments, and Reports—you can specify security parameters that further govern the actions of each specific resource.

Objectives

1. Navigate the Employees window
2. Use the Employees Quickfilter
3. Add a new employee
4. Assign department ownership for an employee
5. Assign department permissions for an employee
6. Assign a resource code to an employee
7. Assign employee passwords
8. Maintain employee security records
9. Delete an employee

Objective 1: Navigate the Employees window

From the Employees window, you establish and maintain a list of all resources in the TimeWizard system. At the top of this window is the Employees Quickfilter (see Objective 2). The main body contains data that is pulled from each employee's security record. Table 11.1 explains each Employee Toolbar icon. Table 11.2 explains icon used in the Employees window.

Navigating the Employees Window

To open the Employees window, follow either of these steps:

1. Click on the Employees icon. 
2. Select Tools > Employees from the TimeWizard main menu.

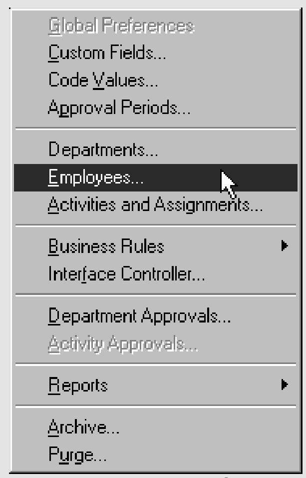
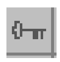


Figure 11.1

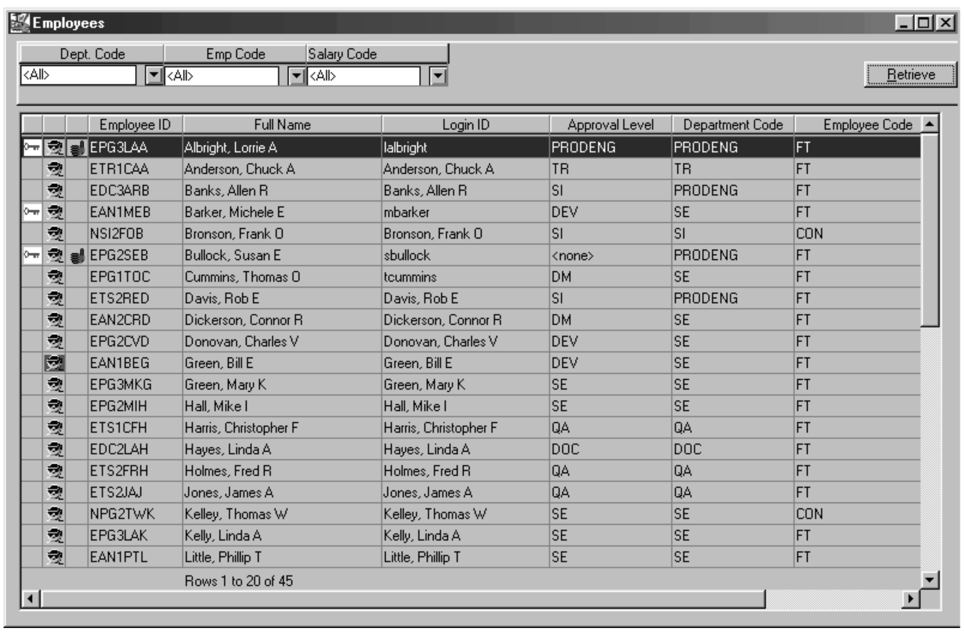
Table 11.1: Employee Toolbar Icons

Employee Window Icons	Explanation
	The add employee icon opens an empty Employee Detail dialog box for you to add a new employee to the TimeWizard system.
	The delete employee icon deletes a selected employee from the TimeWizard system. You cannot delete an employee who has timesheet transactions existing in any period.
	The edit employee icon opens the Employee Detail dialog box of a selected employee for you to edit the employee record.

Table 11.2: Employees Window

Employee Window Icons	Explanation
	The employee icon signifies an active employee in the TimeWizard system. If the icon has a red background, the employee status is inactive.
	The key icon signifies that the employee has administrator-level accesss in the TimeWizard system.
	The thumbs up icon signifies that the employee is a department owner and has department-level permissions in the TimeWizard system.

Example Figure 11.2 shows an example TimeWizard Employees window. In this example, we selected <All> for each Quickfilter field to retrieve all employees in the TimeWizard system.



Employee ID	Full Name	Login ID	Approval Level	Department Code	Employee Code
EPG3LAA	Albright, Lorrie A	lalbright	PRODENG	PRODENG	FT
ETR1CAA	Anderson, Chuck A	Anderson, Chuck A	TR	TR	FT
EDC3ARB	Banks, Allen R	Banks, Allen R	SI	PRODENG	FT
EAN1MEB	Barker, Michele E	mbarker	DEV	SE	FT
NSI2FOB	Bronson, Frank O	Bronson, Frank O	SI	SI	CON
EPG2SEB	Bullock, Susan E	sbullock	<none>	PRODENG	FT
EPG1TOC	Cummins, Thomas O	tcummins	DM	SE	FT
ETS2RED	Davis, Rob E	Davis, Rob E	SI	PRODENG	FT
EAN2CRD	Dickerson, Connor R	Dickerson, Connor R	DM	SE	FT
EPG2CVD	Donovan, Charles V	Donovan, Charles V	DEV	SE	FT
EAN1BEG	Green, Bill E	Green, Bill E	DEV	SE	FT
EPG3MKG	Green, Mary K	Green, Mary K	SE	SE	FT
EPG2MIH	Hall, Mike I	Hall, Mike I	SE	SE	FT
ETS1CFH	Harris, Christopher F	Harris, Christopher F	QA	QA	FT
EDC2LAH	Hayes, Linda A	Hayes, Linda A	DOC	DOC	FT
ETS2FRH	Holmes, Fred R	Holmes, Fred R	QA	QA	FT
ETS2JAJ	Jones, James A	Jones, James A	QA	QA	FT
NPG2TWK	Kelley, Thomas W	Kelley, Thomas W	SE	SE	CON
EPG3LAK	Kelly, Linda A	Kelly, Linda A	SE	SE	FT
EAN1PTL	Little, Phillip T	Little, Phillip T	SE	SE	FT

Rows 1 to 20 of 45

Figure 11.2

Objective 2: Use the Employees Quickfilter

Once you have entered employees into the TimeWizard system, you can retrieve them quickly using the Employees Quickfilter located at the top of the Employees window. Rather than having to scroll through an entire listing of your company's employees, you can use the quickfilter to list only the employees with whom you want to work.

The fields listed across the top are those specified as quickfilter fields in your Employees Custom Field definitions. The drop-down box below each field contains all possible values associated with the field.

Using the employee quickfilter

Figure 11.3

To use the employee quickfilter, follow these steps:

1. Click on the scroll arrow in each quickfilter field and select your desired filtering parameters.
2. Click "Retrieve" (Employees > Quickfilter > Retrieve).
3. All employees that fall within your selected filtering parameters appear in the Employees window.

TIP: To view all employees, select <All> for each quickfilter field. Or you can type the first characters of a value in a Quickfilter field; as you type, TimeWizard searches ahead for a match.

Objective 3: Add a new employee

Once employees are active in the TimeWizard system, they have timesheets available to them to which assignments can be added and time charged. Through the Employee Detail dialog box, you can create new employee records and access and maintain existing employee records. Table 11.3 gives a detailed explanation of each item of the Employee Detail dialog box. You have the option of adding employees into TimeWizard using three different methods:

- Direct entry into the Employee Detail dialog box from the Employees window (discussed here)

- Direct entry into the Employee Detail dialog box from the Departments window (see chapter 10)
- Automated entry through a Table Retrieval (see chapter 25)

NOTE The bottom of the Employee Detail dialog box contains text boxes for entering each of the user-defined fields that were defined in Chapter 3: Defining Custom Fields.

TIP Once in the Employee Detail dialog box, you can click “Add” (in the upper right corner) to add a new employee (rather than opening a new Employee Detail dialog box from the main Employees Window). When you open a new Employee Detail dialog box in this manner, TimeWizard continues to display several of the employee data selections. This is especially convenient for adding several similar employees in succession.

Adding a new employee

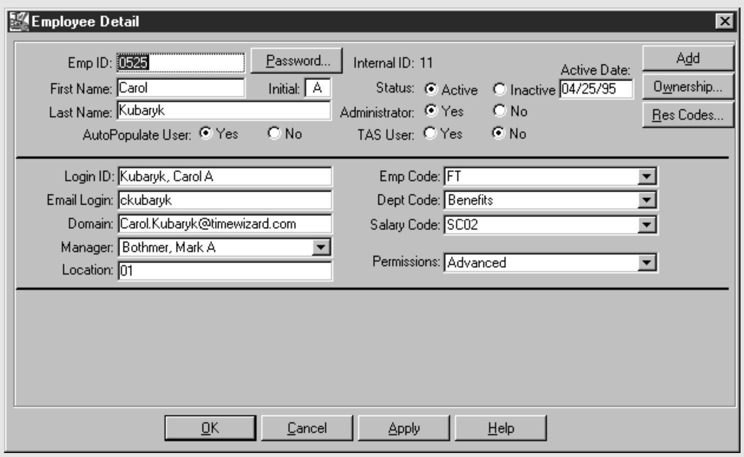


Figure 11.4

To add a new employee, follow these steps:

1. Click on the Add Employee icon (Employee > Add Employee) to open the Employee Detail dialog box.
2. Enter employee information and security parameters. (See detailed explanations of each text box, below.)
3. Click “Apply” to save the settings and remain in the Employee Detail dialog box, or click “OK” to save the settings and exit the dialog box.

Table 11.3: Employee Detail (continued on page 157)

Employee Detail	Definition
Emp ID	This identification number is unique for each employee and is designated by the TimeWizard Administrator.
Internal ID	This identification number is unique for each employee and is designated by the TimeWizard system.
First Name, Initial, Last Name	These fields identify the employee by name.
Status	This identifies whether the employee is active or inactive in the TimeWizard system. Active status indicates that the employee has one TimeWizard license. Inactive status indicates that the employee does not have the required TimeWizard lisence.
Administrator	This identifies (yes or no) whether the employee has administrator-level access in the TimeWizard system. This also determines whether the employee's login ID appears in the drop-down login menu for the TimeWizard Administrator application.
Active Date	This identifies the date on which the employee became active in the TimeWizard system.
AutoPopulate User	This identifies (yes or no) whether the employee's timesheets can be automatically populated with time entries.
TAS User	This identifies (yes or no) whether the employee can use a TimeWizard Time & Attendance Suite Timesheet or Timeclock application. Time & Attendance users cannot access other TimeWizard timesheet applications. (See the *TimeWizard Time & Attendance Suite Guide*.)
Login ID	This identifies the employee's login ID for the TimeWizard system. The employee's login ID appears in the drop-down login menu for the TimeWizard timesheet application.

Table 11.3: Employee Detail (continued from page 156)

Employee Detail	Definition
Email Login	This identifies the employee's fully-qualified Internet e-mail address, e.g., mark.bothmer@timewizard.com, to be used for specified communication. (If your e-mail system does not accept Internet e-mail addresses, consult your system administrator regarding e-mail login IDs.)
Domain	This identifies the employee's fully-qualified Internet e-mail address, e.g., mark.bothmer@timewizard.com. This is used only by TimeWizard.*enterprise*.
Manager	This identifies the resource who manages the employee and is used for reporting purposes only.
Location	This identifies the working location of the employee (e.g., company headquarters may be location 01 or Seattle).
Emp Code	This code is selected from the list of Employee Code values. It identifies the employee's specific employee code in the TimeWizard system (e.g., full-time, part-time, contract). (See Tools > Code Values.)
Dept Code	This identifies the department that owns the employee's approval unit. Often, these are the same.
Approval Unit	This identifies the department or subgroup to which the employee submits his or her timesheet. (See Tools > Departments.)
Salary Code	This code is selected from the list of Salary Code values. It identifies the employee's specific salary code in the TimeWizard system (e.g., SC01, SC02). (See Tools > Code Values.)
Permission	This identifies the employee's permission profile settings in the TimeWizard system. (See Tools > Business Rules > Permissions.)

Objective 4: Assign department ownership for an employee

A department owner has the ability to view timesheets for employees in any departments owned. In the Departments Owned By dialog box, you can manage the department owner's access and control over the timesheets in each owned department.

You can assign direct ownership of departments from any level of the department hierarchy. "Directly owned" departments are the departments listed in the department owner's Departments Owned text box. "Indirectly owned" departments are the departments that are subordinate to a directly owned department in the department hierarchy and have not been assigned in the Departments Owned text box. Both directly and indirectly owned departments display in the department owner's View drop-down list on the timesheet. A department owner has the same department permissions with an indirectly owned department as with the higher-level directly owned department.

Usually, you assign direct ownership of all departments that the department owner regularly approves, whether the departments are lower-level or higher-level departments. By allowing a department owner to display indirectly owned departments in the approvals area, you can enable a department owner of a higher-level department to act as the direct owner of a lower-level department, e.g., in that owner's absence. See Objective 5 for further information on indirectly owned departments.

Assigning department ownership for an employee *(continued on page 159)*

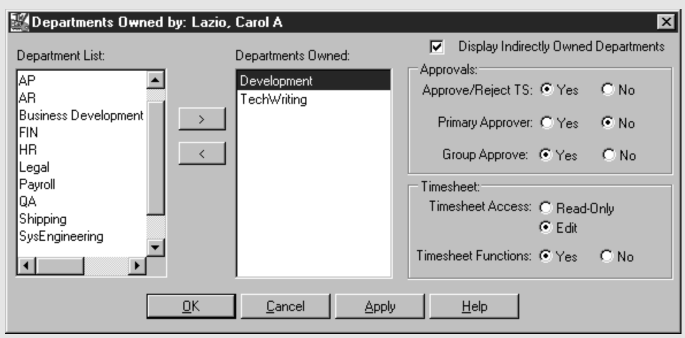


Figure 11.5

To assign department ownership for an employee, follow these steps:

NOTE: Assigning department ownership is not part of the initial employee record setup. When you have completed an employee record for a new employee, you must save the settings by clicking on Apply before the Ownership command button becomes available.

1. In the Employees window, double-click on an employee to open the Employee Detail window.
2. Click "Ownership" to open the Departments Owned By dialog box.

In the Departments Owned By dialog box, all departments entered into the TimeWizard system (see Chapter 4: Assigning Code Values) are listed on the left. All departments directly owned by the employee are listed on the right.

3. Select the department to be owned from the Department List text box (at left).

Assigning department ownership for an employee ***(continued from page 158)***

4. Click on the “>” to move the selected department to the Departments Owned text box (on the right). You also can double-click on the selected department to move it over.

To correct or change a department assignment, select the incorrect entry and click on the “<” to move it back to the Department List box. You also can double-click on the incorrect entry to move it back.

5. Click “Apply” to save the settings and remain in the dialog box, or click “OK” to save the settings and exit the dialog box.

Objective 5: Assign department permissions for an employee

The right side of the Departments Owned By dialog box contains permission settings that manage the department owner’s access and control over the timesheets in his or her department.

NOTE

A department owner can have different permissions for each owned department.

If you use the department approvals process, you may enable approvers who use TimeWizard.*enterprise* to display their indirectly owned departments in the approvals area. The TimeWizard client/server approvals area uses a different procedure, which is explained in Chapter 8, “Approving and Rejecting Timesheets for Departments.”

You can enable TimeWizard.*enterprise* department approvers to approve timesheets in a Department Summary view by assigning the Group Approve permission. Department approvers without this permission perform approvals in the more detailed Timesheet Summary view. Group approvers may use either view. For more information, see the *TimeWizard.enterprise User’s Guide*.

Assigning department permissions for an employee

To assign department permissions for an employee, follow these steps:

1. Specify whether the employee can display indirectly owned departments in the TimeWizard.*enterprise* Department Approvals area.
2. Indicate (Yes or No) whether the employee can approve and reject timesheets for the department owned.
3. Indicate (Yes or No) whether the employee is the primary approver—if not, then the employee is a "backup" approver—of the timesheets for the department owned. This designation can be included in TimeWizard reports.
4. Indicate (Yes or No) whether the employee can "group approve" in the TimeWizard.*enterprise* Department Summary view. If not, the employee can perform approvals only in the Timesheet Summary view.
5. Indicate whether the employee has read-only or edit timesheet access capabilities on the timesheets for the department owned. In other words, can the department owner only look at the timesheets (read-only) or actually make changes to the timesheets (edit)? Making edits requires leaving a note in TimeWizard.
6. Indicate (Yes or No) whether the employee is allowed to perform timesheet functions for everyone in the department owned. Table 11.4 gives a detailed explanation of timesheet functions. Timesheet functions include the following permissions:
   - Add Assignments
   - Delete Assignments
   - Close Assignments
   - Open Assignments
   - Historical Corrections
   - Edit ETCs
7. Click "Apply" to save the settings and remain in the dialog box, or click "OK" to save the settings and exit the dialog box.

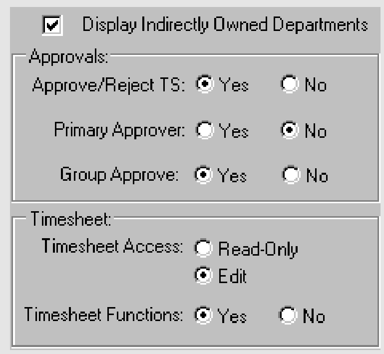


Figure 11.6

Table 8.4: Departmental Options (Timesheet Functions)

Departmental Options	Definition
Add Assignments	This option enables the department owner to add assignments to any timesheets within his or her department.
Delete Assignments	This option enables the department owner to delete assignments from any timesheets within his or her department.
Close Assignments	This option enables the department owner to close assignments so that no time may charged against them on any timesheets within his or her department.
Open Assignments	This option enables the department owner to open closed assignments so that time may charged against them on any timesheets within his or her department.
Historical Corrections	This option enables the department owner to make historical corrections to data on any timesheets within his or her department.
Edit ETCs	This option enables the department owner to edit the Estimate to Complete project-related data on any timesheets within his or her department.

Objective 6: Assign a resource code to an employee

If you chose to use resource codes, you can assign resource code values to individual employees. These values represent specific skills offered by the employee, such as programming, accounting, and editing.

NOTE

Assigning resource codes is not part of the initial employee record setup. When you have completed an employee record for a new employee, you must save the settings by clicking Apply before the Resource Codes command button becomes available.

Assigning a resource code to an employee

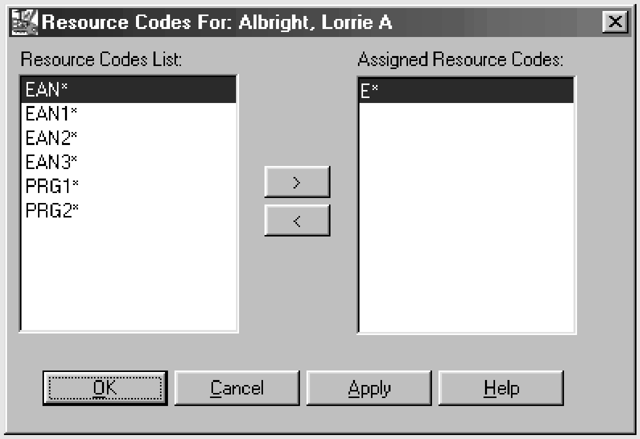


Figure 11.7

To assign a resource code to an employee, follow these steps:

1. In the Employees window, double-click on an employee to open the Employee Detail window.
2. Click “Resource Codes” to open the Resource Codes For dialog box.

   In the Resource Codes For dialog box, all resource codes entered into the TimeWizard system (see Chapter 4: Defining Custom Fields) are listed on the left. All resource codes assigned to the employee are listed on the right.
3. Select the resource to be owned from the Resource Codes List box (on the left).
4. Click on the “>” to move the selected resource code to the Assigned Resource Codes box (on the right). You also can double-click on the selected resource to move it over.

   To correct or change a resource assignment, select the incorrect entry and click on the “<” to move it back to the Resource Codes List box. You also can double-click on the incorrect entry to move it back.
5. Click “Apply” to save the settings and remain in the dialog box, or click “OK” to save the settings and exit the dialog box.

Objective 7: Assign employee passwords

The Password command button in the Employee Detail window opens the Change Password For dialog box and enables you to enter the employee's password, which is used in conjunction with the Login ID to gain entry into the TimeWizard system. It must be at least six characters in length, with the maximum length being 20 characters. Warning: Do not use uppercase for the password and do not begin or end the password with the letter "a"! Once entered, the password appears as asterisks to ensure privacy.

Assigning employee passwords

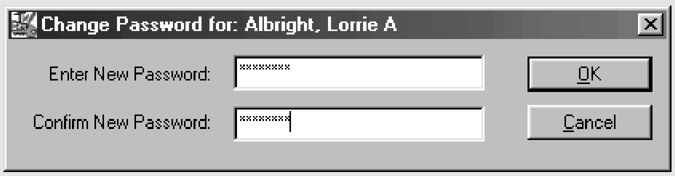


Figure 11.8

To assign employee passwords, follow these steps:

1. Type the new password in the Enter New Password text box. Remember: Do not use uppercase for the password.
2. Type the new password once again in the Confirm New Password text box.
3. Click "OK" to save the settings and exit the dialog box.

If you do not enter a password when adding a new employee, the password default setting is "password." If you wish, you can let the default password apply and allow employees to change their own passwords the first time they login.

If an employee forgets his or her password, you (as TimeWizard Administrator) can open the default window for the employee, click on the Password command button, and follow the steps outlined above to enter a new password. However, you cannot find out what the old password was.

Objective 8: Maintain employee security records

In the event an employee changes employment status (e.g., from contract or part-time to fulltime), you can change the employee ID within his or her employee record. The new employee ID must be unique. TimeWizard retains the original employee ID in historical data. In addition, you can make other corrections to an employee's security record as necessary.

Maintaining Employee Security Records

To maintain employee security records, follow these steps:

1. From the Employees window, select the employee whose record you wish to edit.
2. Click on the Edit Employee icon or double-click on the employee to open the Employee Detail window.
3. Make any necessary changes to the record.
4. Click "Apply" to save the settings and remain in the window, or click "OK" to save the settings and exit the window.

Objective 9: Delete an employee

You cannot delete an employee who has timesheet transactions existing in any period (open or closed). The only way to delete such an employee is to first archive any period in which time has been entered for the employee (such periods must be closed) and then delete any assignments associated with the employee.

Deleting an employee

To delete an employee, follow these steps:

1. From the Employees window, select the employee you want to delete.
2. Click the Delete Employee icon (Employee > Delete Employee) to open the Delete Employee dialog box.
3. TimeWizard displays a prompt, "Are you sure you want to delete this employee?" Click "Yes" to delete the record.

Summary

In this chapter, you have learned how to add employees to your TimeWizard system and setup security records for those employees. These records give you the ability to exercise precise control over who is permitted to use the various functions in TimeWizard.

SECTION FIVE

Managing Projects in TimeWizard

The implied prerequisite to needing a labor tracking system is, well, labor. And by definition, labor includes workers and activities—the two key ingredients to this section. TimeWizard's basic project management capabilities enable you to setup activities and then assign resources to them. TimeWizard defines an "activity" as a task or project and an "assignment" as the link between a resource (employee) and an activity. When you assign an employee to an activity, you authorize that employee to enter or charge time to a project or task on his or her timesheet.

This section includes

Introduction to Project Management in TimeWizard

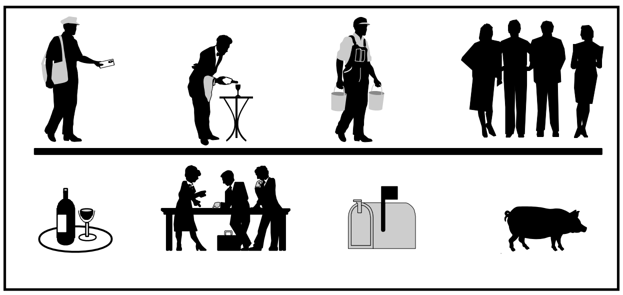
The Activities and Assignments area enables you to create, maintain, and control access to activities in your TimeWizard system. For any activity listed in the Activities and Assignments window, you can add resource assignments, view employees available for assignment, assign employees to an activity, and maintain existing assignments. Table I.1 gives a detailed explanation of each section of the Activities and Assignments window (displayed in Figure I.1). Table I.2 explains each toolbar icon in the Activities and Assignments window.

You also have the choice of managing projects in a project management system (e.g., Microsoft Project 98, Primavera P3, or Business Engine) and then sharing project-related data with TimeWizard through one of its ProjectLink interfaces. For more information, Section 7: Sharing TimeWizard Data with Other Systems.

There are two assignment types in TimeWizard:

- A resource assignment is the association of a resource code and an activity.
- An employee assignment is the association of an activity, a resource code, and an employee.

Before we go any further—just to be certain that you understand the difference between TimeWizard assignment types—we are going to play a game that you probably haven't seen since kindergarten: "Match the Worker to the Job." On the top there are the following workers: a postal worker, a waiter, a farmer, and a group of office workers. On the bottom there are the following jobs: serving a bottle of wine, attending an office meeting, delivering mail, and feeding a pig. The object of the game is to match the right worker to the right job.



In this exercise, the specific professional abilities—such as those represented by a postal worker, a waiter, or a farmer—are resource types. Some of the jobs or activities—such as farming, waiting tables, or delivering mail—can only be done by certain resource types. When you match a specific resource type to a specific activity, you have created a resource assignment. Only employees who have the appropriate resource codes may be assigned to resource assignments.

Other activities—such as attending an office meeting—can be done by any worker. When you match any resource type to a specific activity, you have created an <unclassified> resource assignment. Any employee—regardless of what resource codes they have—may be assigned to <unclassified> resource assignments.

Finally, when you put an individual employee—whether that is Joe the postal worker, Bob the farmer, or Mary the office employee—to work on a resource or <unclassified> assignment, you have created an employee assignment.

Table I.1: Activities and Assignments Window Area

Activities and Assignments Area	Explanation
Activities Quickfilter	The Activities Quickfilter enables you to retrieve only the activities with which you want to work. The fields listed across the top are those specified as quickfilter fields in your Activities Custom Field definitions. The drop-down box below each field contains all possible values associated with the field.
Retrieved Activities	Once you click the Retrieve command button, all activities that match your filtering criteria are listed in this area.
Resource Assignments	When you click on an activitiy, all associated resource assignments are listed in this area.
Assigned Employees	When you click on a resource assignment, all associated employee assignments are listed in this area.
Available Employees	When you click on a resource assignment, all employees who have the appropriate resource codes are listed in this area.

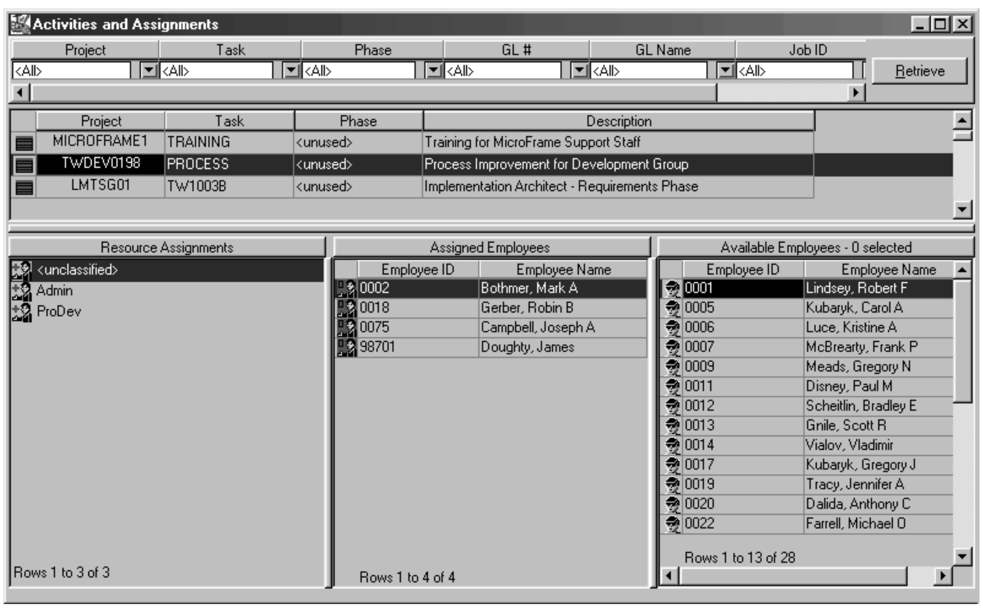
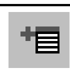
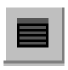
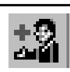
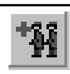
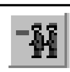
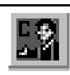
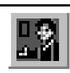
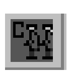
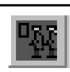


Figure I.1

Table I.2: Activities and Assignments Window Toolbar Icons

Activities and Assignments Window Toolbar Icons	Explanation
	The Add Activity icon opens the Activity Detail window and enables you to select from existing activity values to add a new activity in TimeWizard.
	The Delete Activity icon enables you to remove an activity from TimeWizard. You cannot delete an activity if you have assignments to it in any period.
	The Close Activity icon (which is red) enables you to close an activity to any additional timesheet transactions. When the activity is closed, all associated resource and employee assignments are closed.
	The Open Activity icon (which is green) enables you to open a closed activity (and therefore all associated resource and employee assignments) to additional timesheet transactions.
	The Add Employee Assignment icon enables you to assign a selected available employee to the selected resource assignment.
	The Delete Employee Assignment icon deletes an employee assignment, thereby removing an assigned employee from the Assigned Employees list and returning him or her to the Available Employees list. You cannot delete an employee assignment if any transactions exist.
	The Add Resource Assignment icon enables you to associate a resource code with the selected activity.
	The Delete Resource Assignment enables you to remove an association between a resource code and an activity. You cannot delete a resource assignment if any transactions exist.
	The Close Employee Assignment icon enables you to close a selected employee assignment from any additional timesheet transactions.
	The Open Employee Assignment icon enables you to open a selected closed employee assignment to additional timesheet transactions.
	The Close Resource Assignment icon enables you to close the resource assignment to additional timesheet transactions. When the resource assignments is closed, all associated employee assignments are closed.
	The Open Resource Assignment icon enables you to open the closed resource assignment (and therefore any associated employee assignments) to additional timesheet transactions.

CHAPTER 12

Working with Activities

The Activities and Assignments area—which also includes the Activity Detail dialog box—enables you to create, maintain, and control access to activities in your TimeWizard system. In the next chapter, you will learn how to assign employees to activities so that they can charge time to a project or task on their timesheets. Remember: TimeWizard defines an "activity" as a task or project and an "assignment" as the link between a resource (employee) and an activity.

Objectives

1. Navigate the Activities and Assignments window
2. Use the Activities Quickfilter
3. Add a new activity
4. Define a new activity value
5. Edit an existing activity
6. Delete an existing activity
7. Close an existing activity
8. Open an existing activity

Objective 1: Navigate the Activities and Assignments window

From the Activities and Assignments window, you can create and maintain all TimeWizard activities and assignments. Table 12.1 defines each icon used in this chapter.

Navigating the Activities and Assignments Window

To open the Activities and Assignments window, follow either of these steps:

1. Click on the Activities and Assignments icon.
2. Select Tools > Activities and Assignments from the TimeWizard main menu.

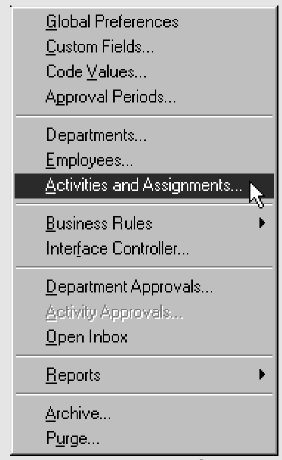


Figure 12.1

Objective 2: Use the Activities Quickfilter

Once you have entered activities into the TimeWizard system, you can retrieve them quickly using the Activities Quickfilter located at the top of the Activities and Assignments window. Rather than having to scroll through an entire listing of your company's activities, you can use the quickfilter to narrow the list of activities with which you want to work.

The fields listed across the top are those specified as quickfilter fields in your Activities Custom Field definitions. The drop-down box below each field contains all possible values associated with the field.

By selecting values for one or more quickfilter fields, you can reduce the number of activities retrieved from the TimeWizard database. This can be a benefit for performance and for ease of use.

Using the activity quickfilter

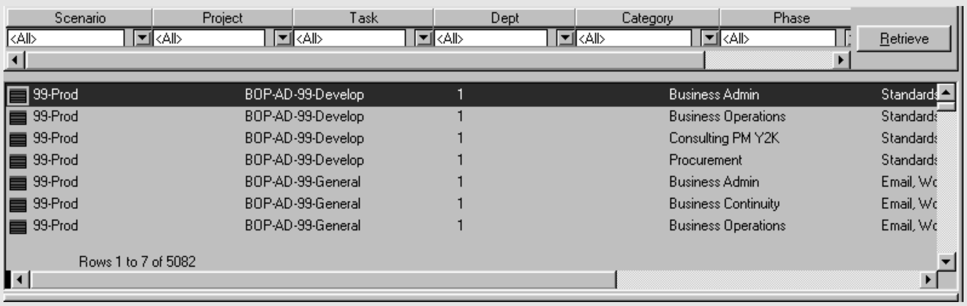


Figure 12.2

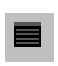
To use the activity quickfilter, follow these steps:

1. Click on the scroll arrow in each quickfilter field and select your desired filtering parameters. Note: To view all activities, select <All> for each quickfilter field.
2. Click on the "Retrieve" command button (Activities > Quickfilter > Retrieve).
3. All activities that fall within your selected filtering parameters appear in the activity quickfilter window.

TIP

To view all activities, select <All> for each quickfilter field. Or you can type the first characters of a value in a Quickfilter field; as you type, TimeWizard searches ahead for a match.

Table 12.1: Retrieved Activities Area Icons

Retrieved Activities Area Icons	Explanation
	The open activity icon (which is green) indicates that the selected activity open and that you may associate resource assignments with it.
	The closed activity icon (which is red) indicates that the selected activity closed and that you may not associate resource assignments with it. Any existing resource and employee assignments are automatically closed.

Objective 3. Add a new activity

From the Activity Detail dialog box, you can combine the activity code values you created in Chapter 4 to create new activities in your TimeWizard system. Each activity must be a unique combination of activity code values. The Activity Detail dialog box consists of four sections: key activity field information, non-key activity field information, project management information, and last update information. Table 9.2 explains these sections in detail.

You have the option of adding activities into TimeWizard using three different methods:

- Direct entry into the Activity Detail dialog box from the Activities and Assignments window (discussed here)
- Automated entry through a ProjectLink (see Section 7)
- Automated entry through a Table Retrieval (see Section 7)

Once in the Activity Detail dialog box, you can click “Add” (in the lower left corner) to add a new activity (rather than opening a new Activity Detail dialog box from the Activities and Assignments window). When you open a new Activity Detail dialog box in this manner, TimeWizard continues to display several of the activity data selections. This is especially convenient for adding several similar activities in succession.

Adding an activity

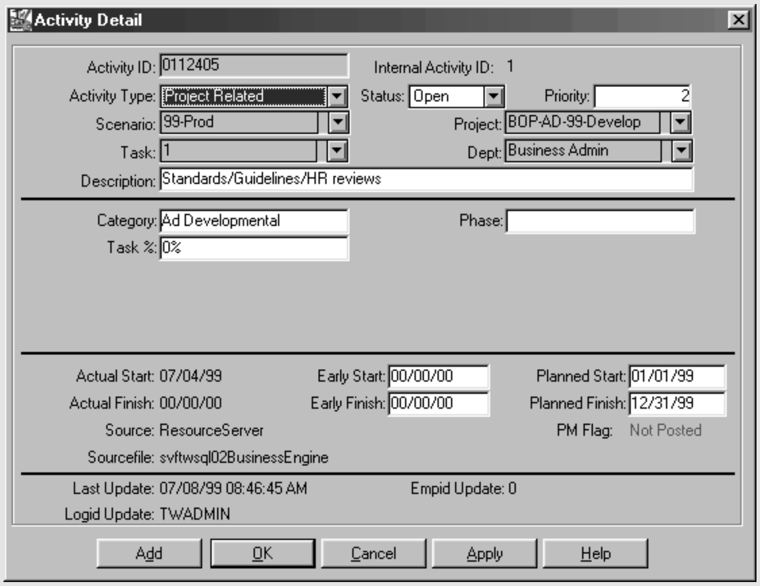


Figure 12.3

To Add a new activity, follow these step

1. Click on the Add Activity icon to open the Activity Detail window (Activity > Add Activity).
2. Enter the appropriate information requested for each section of the Activity Detail window. (See "The Activity Detail Window," this chapter, for detailed explanations.)
3. Click "Apply" to save the settings but remain in the Activity detail window, or click "OK" to save the settings and close the Activity Detail window.

Example Figure 12.3 shows an example Activity Detail window in which we created an activity described as "Standards/Guideline/HR Reviews." The fields available in the Activity Detail window are determined by the custom field settings you defined in Chapter 3: Defining Custom Fields. This example activity has the following key field values:

- Project: BOP-AD-99-Develop
- Scenario: 99-Prod
- Task: 1

Table 12.2: Activity Detail Area (continued on page 177)

Activity Detail	Explanation
Activity ID (Internal)	This is an internal identifier that TimeWizard enters automatically for each activity.
Activity ID (User-supplied)	This is an identifier that you enter for each activity.
Activity Type	This specifies whether the activity is project-related, overhead leave (OH-Leave), overhead break (OH-Break), other overhead (OH-Other), or an expense (OH-Expense). In the Clock-In/Clock-Out (CIO) timesheet, leave assignments accept an amount of time instead of times of day, as they do in non-CIO timesheets. Time logged to break assignments is not counted in daily or period totals. Expense assignments can be added only to expense sheets.
lsActivity Status	This specifies whether the activity is open or closed. When an activity is closed, all associated assignments are also closed.
Activity Priority	This enables you to rank the level of importance of the activity. A lower number designates a higher priority (except in Microsoft Project, for which the opposite is true).
User-Defined Key Fields	These are the general categories of activity-related information that you want TimeWizard to capture (see Chapter 3: Defining Custom Fields). The example user-defined key fields shown in Figure 9.3 are scenario, project, task, and department.
Activity Description	This is the description of the activity as it will appear on the timesheet.

Table 12.2: Activity Detail Area (continued from page 178)

Activity Detail	Explanation
The non-key activity section	This consists of information based on your custom-defined non-key activity fields (see Chapter 3: Defining Custom Fields). The example non-key fields in Figure 12.3 are category, phase, and task.
Planned Start/Finish	These reflect your company s desired dates to begin and end the activity.
Early Start/Finish	These are dates based on dependencies associated with the activity.
Actual Start/Finish	TimeWizard automatically generates these dates based on the date of the first timesheet transaction associated with the activity (actual start) and the date of the last timesheet transaction before the activity is closed (actual finish).
Source	This indicates the source application that added the activity. The source might be TimeWizard if the activity was entered manually or another source if entered by TimeWizard's Table Retrieval or ProjectLink features.
Source File	This indicates the source file from which the information for the activity originated if it is a source other than TimeWizard.
Project Management (PM) Flag	This indicates to TimeWizard whether update information on the activity has been posted to a project management system.
Delete Flag	This is used only in conjunction with ProjectLink interfaces if the activity has been deleted from the project management system. If the activity has time posted to it, then it can only be marked for delete.
Last Update	This indicates the date of the last update to the selected activity.
Login ID (Logid) Update	This indicates the login ID of the last employee to update to the selected activity.
Employee ID (Empid) Update	This indicates the employee ID of the last employee to update to the selected activity.

Objective 4: Define a new activity value

In the event you are attempting to create a new activity but a necessary activity value is not yet in your TimeWizard system, you can create such a value on the fly. TimeWizard provides a link from the Activity Details dialog box to the Code Values window, which enables you to add a new value for a key field. You can then return to the Activity Details dialog box and finish creating the new activity.

Defining a new activity value

To define a new activity value, follow these steps:

1. Type the new value in the appropriate key field text box.
2. As soon as you enter and apply a new project name (by either clicking "Apply" or clicking on any other text box in the Activity Detail window), TimeWizard opens a dialog box asking if you wish to add the value.
3. Click "OK" to open the Code Values window, with your new value entered (see Chapter 5: Assigning Code Values).
4. Click "OK" to save the Code Values window information and return to the Activity Detail window.

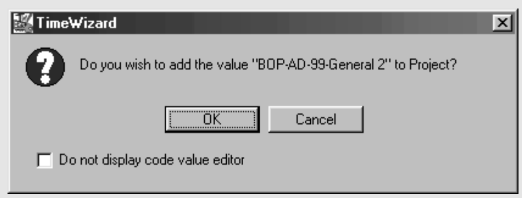


Figure 12.4.1

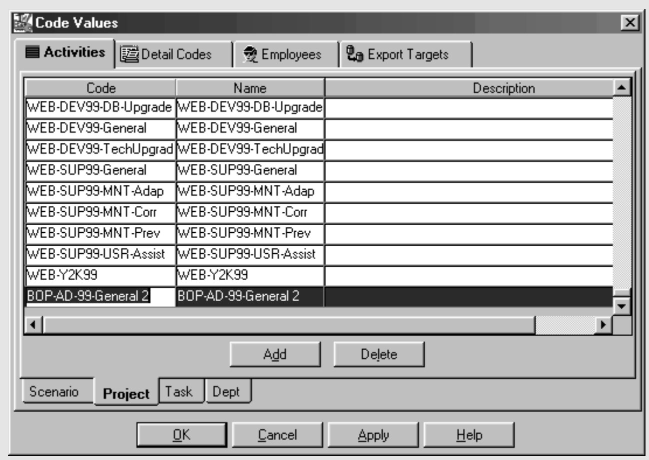


Figure 12.4.2

You can bypass the Code Value Editor by checking the "Do not display Code Value Editor" option in the TimeWizard dialog box. TimeWizard will automatically add the new value for you.

Example: In the example shown in Figures 12.4.1 and 12.4.2, we are adding a new value "BOP-AD-99-General 2" to the Project field. When we return to the Activity Detail window, we can use the newly added value to create a new activity.

Objective 5: Edit an existing activity

You can edit existing activities by modifying the data listed in the Activity Detail window. To maintain the relationships and integrity of the TimeWizard database, you cannot modify the key fields in activity records. If you need to change these fields, you must first delete the activity (or close it if hours exist) and then re-add it with the new fields.

Editing an activity

To Edit an Activity, Follow these steps

1. Click on an activity listed in the Activities and Assignments window.
2. Click on Activity > Edit Activity (or double-click on the activity) to open the Activity Detail window for the selected activity.
3. Modify existing information as needed.
4. Click "Apply" to save the settings and remain in the Activity Detail window, or "OK" to save the settings and exit the Activity Detail window.

Objective 6: Delete an existing activity

To maintain the relationships and integrity of the TimeWizard database, you cannot delete an activity if you have assignments (open or closed) to it in any period (see Figure 12.6.2). For more information on the Archive and Purge functions (which allow you to save and then delete unneeded data) see Chapter 2: Working with the TimeWizard Database.

You can instruct TimeWizard to proceed without displaying the Delete Activity confirmation dialog box by specifying "Do not ask this question again."

Deleting an activity

Figure 12.5.1

Figure 12.5.2

To Delete an Activity, follow these steps:

1. Click on an activity.
2. Click on the Delete Activity icon (Activity > Delete Activity).
3. TimeWizard displays a prompt, "Delete selected activity?"

Click "OK" to delete the activity (see Figure 9.5.1). If transactions exist for the activity, TimeWizard displays a dialog box stating that you cannot delete the activity (see Figure 12.5.2).

Objective 7: Close an existing activity

Once an activity is closed, employees cannot enter hours for any assignments associated with it on their timesheets. Any time already entered on the timesheet will stay as is, but TimeWizard will lock out any further transactions associated with those assignments and any additional assignments to that activity. When you close an activity, you are saying that all work must stop for all associated assignments.

Closing an existing activity

To close an existing activity, follow these steps:

1. Click on an activity.
2. Click on the Close Activity icon (Activity > Close Activity) to close the selected activity.
3. TimeWizard displays a prompt, "Close activity and all associated assignments?" Click "OK" to close the activity.

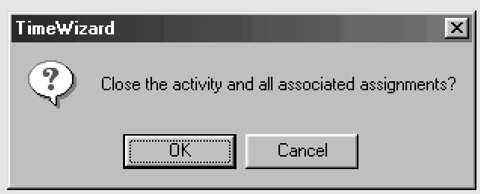


Figure 12.6

Objective 8: Open an existing activity

When opening an activity, associated assignments can be opened automatically at the same time, and then new assignments and subsequently time entries can be associated with it.

TIP When you open an activity, you can instruct TimeWizard to open all associated activities at the same time by specifying “Open all associated assignments” in the Open selected activities confirmation dialog box.

Opening an activity

To open an existing activity, follow these steps:

1. Click on an activity.
2. Click on the Open Activity icon (Activity > Open Activity) to open the selected activity.
3. TimeWizard displays a prompt, “Open selected activities?” Click “Yes” to open the activity.

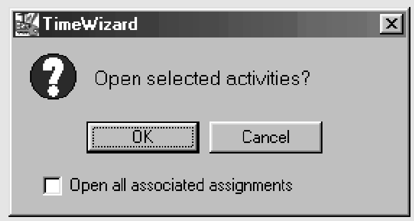


Figure 12.7

TIP You can select multiple activities to assign to a resource assignment.

To select multiple activities in sequence: 1. Click on the top activity. 2. Hold down the Shift key. 3. Click on the bottom activity.

To select multiple activities not in sequence: 1. Click on one activity. 2. Hold down the Control key. 3. Click on an additional activity. 4. Continue to hold down the Control key and click on additional activities as needed.

Summary

In this chapter, you learned how to create, maintain, and control access to activities in your TimeWizard system. In the next chapter, you will learn how to assign employees to activities so that they can charge time to a project or task on their timesheets.

CHAPTER 13

Working with Resource Assignments

In Chapter 4, you specified resource code values to allow you to categorize your employees by specific talent designations. Later, in Chapter 11, you assigned these resource code values to specific employees. In this chapter, you create resource assignments, which is the association of a resource and an activity. Only employees who have the appropriate resource codes may be assigned to resource assignments. However, <unclassified> resource assignments are available to any employee not already assigned to the activity.

One employee may have multiple resource codes, and therefore can be assigned to multiple resource (as well as <unclassified> resource) assignments. Any employee—regardless of what resource codes they have—may be assigned to <unclassified> resource assignments.

TIP For instructions on adding activities to TimeWizard, see Chapter 12: Working with Activities.

Objectives

1. Navigate the Assignments area of the Activities and Assignments window
2. Add resource assignments
3. Edit an existing resource assignment
4. Delete an existing resource assignment
5. Close a resource assignment
6. Open a resource assignment

Objective 1: Navigate the Assignments area of the Activities and Assignments window

From the Assignments area of the Activities and Assignments window (Figure 10.1), you can create and maintain resource and employee assignments for all TimeWizard activities. This area is divided into three sections (from left to right): the Resource Assignments section, the Assigned Employees section, and the Available Employees section. For a detailed explanation of each section of the Assignments area of the Activities and Assignments window, refer to Table I.1 in the Introduction of this section. Table 10.1 defines each icon used in this chapter.

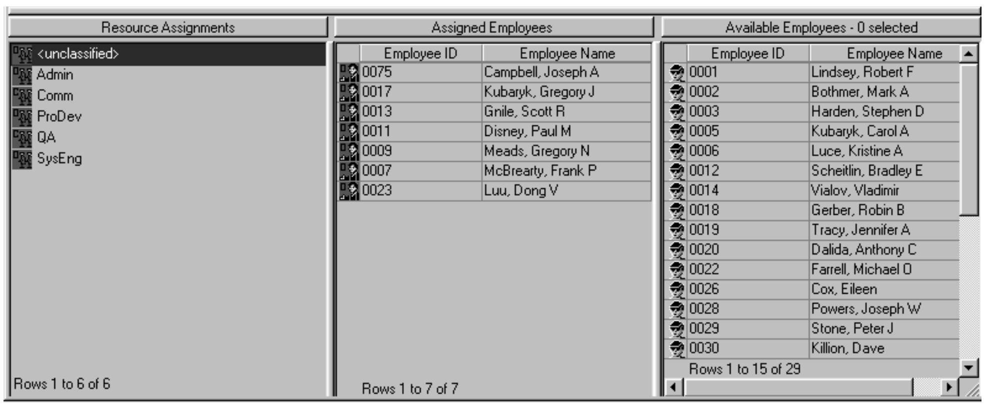
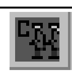
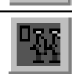


Figure 10.1

Table: 10.1: Resource Assignments Icons

Resource Assignments Icons	Definition
	The closed Resource Assignment icon indicates it is locked from any additional employee assignments and that it is closed against any additional timesheet transactions.
	The open Resource Assignment icon indicates that the associated resource assignment is open for employee assignments and that it will accept timesheet transactions.

Objective 2: Add resource assignments

For any activity listed in the Activities and Assignments window, you can add resource assignments that stipulate which employees can be assigned to the activity.

Adding resource assignments

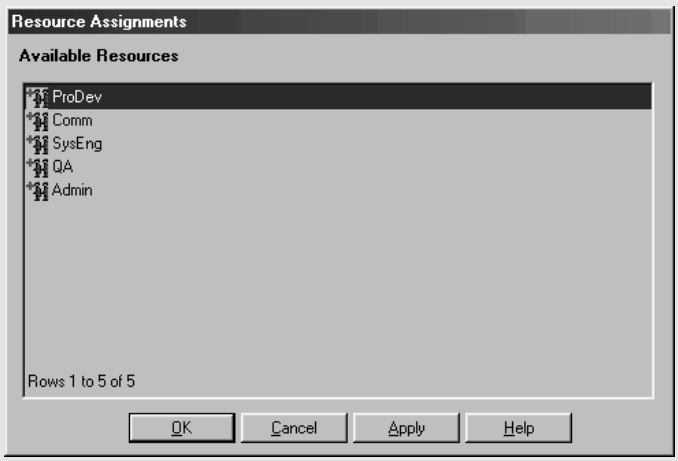


Figure 10.2

To Add resource assignments, follow these steps

1. In the activities quickfilter, click on a listed activity.
2. In the Assignment menu, select Add Resource Assignment to open the Resource Assignment dialog box.
3. Select a resource code from the list to add a resource assignment for the activity.
4. Click OK to save the setting and return to the Activity and Assignments window.

NOTE: Adding a resource assignment to an activity does not assign an employee to the activity. It merely specifies the resource codes available for the employee assignment.

Example The Resource Assignments section of the Assignments area (left) in Figure 10.1 contains the default <unclassified> resource assignment as well as five additional resource assignments that we selected from the Resource Assignment dialog box. In addition, we closed two of the resource assignments so that all related employee assignments are closed and no additional employees may be assigned to them.

Objective 3: Edit an existing resource assignment

You can edit existing resource assignments by modifying the data listed in the Resource Assignment Detail dialog box. To maintain the relationships and integrity of the TimeWizard database, you cannot modify the key field (resource) in assignment records. If you need to change this field, you must delete the assignment and then add it with the new resource. Table 10.2 defines each area of the Resource Assignment Detail dialog box.

Editing a resource assignment

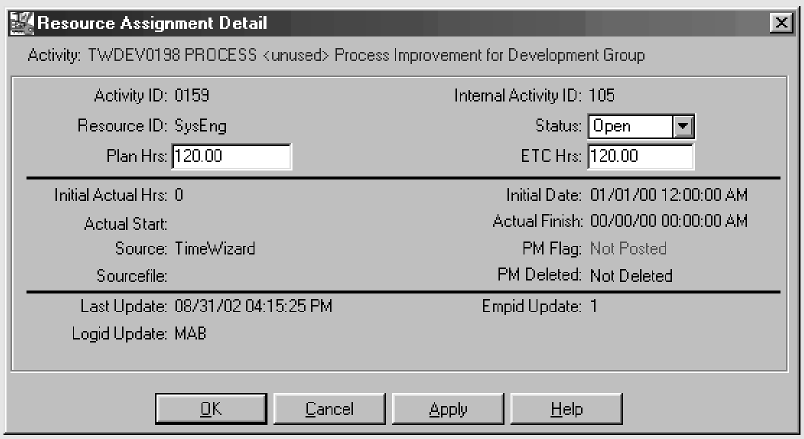


Figure 10.3

To edit an existing resource assignment, follow these steps

1. Click on a resource assignment.
2. Click on Assignment > Edit Resource Assignment to open the Resource Assignment Detail window.
3. Alter the information as needed.
4. Click “Apply” to save the settings but remain in the Resource Assignment Detail window, or click “OK” to save the settings and close the Resource Assignment Detail window.

Example Figure 10.3 shows an example Resource Assignment Detail dialog box in which we created a resource assignment named SysEng for the selected activity. Any employee assigned to the SysEng resource assignment for the selected activity must be associated with the SysEng resource code.

Table: 10.2: Resource Assignment Detail Area

Resource Assignment Detail Area	Explanation
Activity:	This area displays the key field values and description of the activity with which the resource assignment is associated.
Activity ID	This is an internal identifier that TimeWizard enters automatically for each activity.
Internal Activity ID	This is an internal identifier that TimeWizard enters automatically for each activity.
Resource ID	This indicates whether the resource assignment is generic (and based on a specific resource type) or <unclassified>.
Assignment Status	This specifies whether the resource assignment is open or closed. When a resource assignment is closed, all associated employee assignments are closed and no additional timesheet transactions may be applied.
Plan Hours	This indicates how many actual hours the task is planned to take, regardless of how many employee assignmwents are associated with it.
Estimated Hours to Complete (ETC)	This indicates the estimated number of hours remaining before all assigned employees complete the task.
Initial Actual Hours	This indicates the number of hours associated with the resource assignment prior to its being entered into TimeWizard.
Initial Date	This indicates the date on which the initial actual hours began.
Actual Start/Finish	TimeWizard automatically generates these dates based on the date of the first timesheet transaction associated with the resource assignment (actual start) and the date the resource assignment is closed (actual finish).
Source	This indicates the source application that added the resource assignment. The source might be TimeWizard if the assignment was entered manually or another source if entered by TimeWizard's Import or ProjectLink features.
Source File	This indicates the source file from which the information for the assignment originated if it is a source other than TimeWizard.
Project Management (PM) Flag	This indicates to TimeWizard whether update information on the assignment has been posted to a project management system.
PM Deleted	This indicates to TimeWizard whether the assignment has been deleted from a project management system.
Last Update	This indicates the date of the last update to the assignment.
LogID Update	This indicates the login identification of the last person to update the assignment.
Employee ID Update	This indicates the ID of the last person to update the assignment.

Objective 4: Delete an existing resource assignment

To maintain the relationships and integrity of the TimeWizard database, you cannot delete a resource assignment if there is any time entered for it in any period (open or closed). For more information on the Archive and Purge functions (which allow you to save and then delete unneeded data) see Chapter 2: Working with the TimeWizard Database.

TIP You can instruct TimeWizard to procede without displaying the Delete Assignment confirmation dialog box by specifying “Do not ask this question again.”

Deleting a resource assignment

To delete an existing resource assignment, follow these steps

1. Click on a resource assignment.
2. Select Assignment > Delete Resource Assignment to delete the selected assignment.
3. TimeWizard displays a prompt, “Are you sure you want to delete the selected assignment?” Click “OK” to delete the assignment.

Figure 10.4

Objective 5: Close a resource assignment

Once a resource assignment is closed, all associated employee assignments are also closed (i.e., the assigned employee cannot enter hours for it on the timesheet). Any time already entered on the timesheet for that resource assignment will stay as is, but TimeWizard will lock out any further transactions associated with that assignment.

TIP You can instruct TimeWizard to proceed without displaying the Close Resource Assignment confirmation dialog box by specifying “Do not ask this question again.”

NOTE When closing a resource assignment, Actual Finish is calculated based on latest transaction.

Closing a resource assignment

To close a resource assignment, follow these steps

1. Click on a resource assignment.
2. Select Assignment > Close Resource Assignment to close the selected assignment.
3. TimeWizard displays a prompt, "Are you sure you want to close the selected assignment?" Click "OK" to close the assignment.

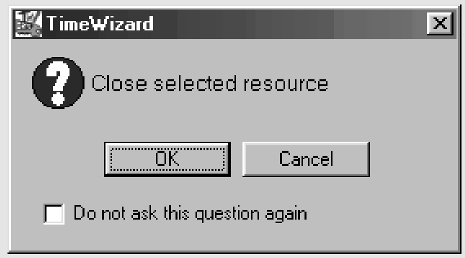


Figure 10.5

Objective 6: Open a resource assignment

When opening a resource assignment, associated employee assignments can be opened automatically at the same time, and then new employee assignments and subsequently time entries can be associated with it.

TIP: When you open a resource assignment, you can instruct TimeWizard to open all associated employee assignments at the same time by specifying "Open all associated assignments" in the Open selected activities confirmation dialog box.

NOTE: When opening a resource assignment, Actual Finish is cleared.

Opening a resource assignment

To open a resource assignment, follow these steps

1. Click on a resource assignment.
2. Select Assignment > Open Resource Assignment to open the selected assignment.
3. TimeWizard displays a prompt, "Are you sure you want to open the selected assignment?" Click "OK" to open the assignment.

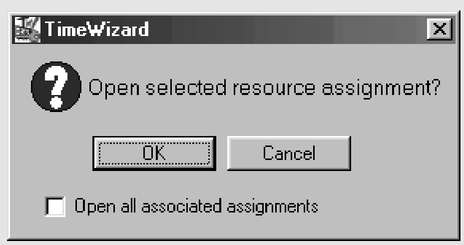


Figure 10.6

Summary

In this chapter, you have learned how to make resource and <unclassified> resource assignments to the activities in your TimeWizard system. Your next step is to make employee assignments based on the resource code criteria—thereby authorizing your company's employees to work on specific projects and charge time against those projects on their timesheets.

CHAPTER 14

Working with Employee Assignments

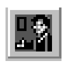
From the the Assigned Employees section and the Available Employees section of the Activities and Assignments window, you can create and maintain employee assignments. In this process, employees are assigned to a resource or <unclassified> resource assignment (employee-specific) for a selected activity.

Only employees who have the proper resource codes are available for resource assignments. However, any employee not already assigned to a selected activity is available for <unclassified> resource assignments (i.e., employee-specific assignments). Table 14.1 defines each icon used in this chapter.

Objectives

1. Assign available employees to a resource assignment
2. View assigned employees
3. Edit an existing employee assignment
4. Delete an existing employee assignment
5. Close an existing employee assignment
6. Open an existing employee assignment

Table: 14.1: Employee Assignments Icons

Employee Assignments Icons	Definition
	The closed employee assignment icon indicates that the selected assignment is closed to any additional timesheet transactions.
	The open employee assignment icon indicates that the selected assignment is open to additional timesheet transactions.

Objective 1: Assign available employees to a resource assignment

An available employee is defined as one who is not already assigned to the selected resource assignment. The list of available employees will vary depending on the resource code requirements of the resource assignment. For example, if the resource assignment is "SysEng," only employees who have the "SysEng" resource code will be listed. However, if the resource assignment is <unclassified>, all available employees will be listed, regardless of which resource codes they have. Multiple employees may be assigned to the same activity, and any given employee may be assigned to multiple activities.

TIP

You can view employees by either name or employee ID by changing the display order (Assignment > Display Order > By Name/By Employee ID). To do so, click on the data column header you prefer in the Available Employees area.

Assigning available employees to a resource assignment

To assign available employees to an activity, follow These steps:

1. In the Retrieved Activities area, click on a listed activity.
2. In the Resource Assignments area (left), select either <unclassified> or a specific resource assignment.
3. In accordance with your selections, all employees available for assignment are listed in the Available Employees box (right).
4. Click on an available employee.
5. Drag and drop the available employee from the Available Employees box (right) to the Assigned Employees box (center). Or click on the Add Assignment icon (Assignment > Add Assignment).

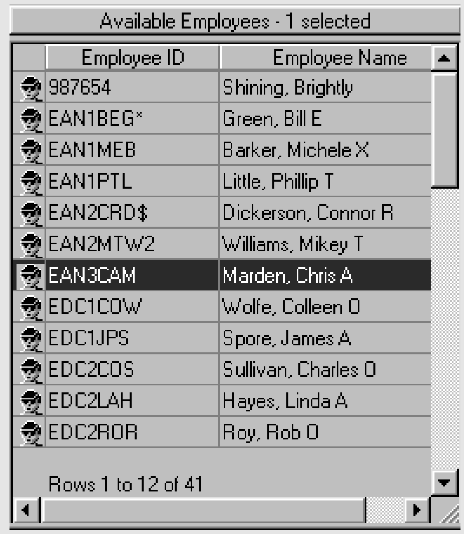


Figure 14.1

TIP

You can select multiple employees to assign to a resource assignment.

To select multiple employees in sequence: 1. Click on the top employee. 2. Hold down the Shift key. 3. Click on the bottom employee.

To select multiple employee not in sequence: 1. Click on one employee. 2. Hold down the Control key. 3. Click on an additional employee. 4. Continue to hold down the Control key and click on additional employees as needed.

Objective 2: View assigned employees

The Assigned Employees box (center) lists all employees assigned to specified resource assignment for the selected activity.

TIP

You can view employees by either name or employee ID by changing the display order. To do so, click on the data column header you prefer in the Assigned Employees area.

Viewing assigned employees

To view assigned employees, follow these steps

1. Click on a listed activity.
2. Click on an associated resource assignment.
3. Check the Show Assigned Employees box at the bottom of the Activities and Assignments window.
4. All employees assigned to the selected activity are listed in the Assigned Employees box at right.

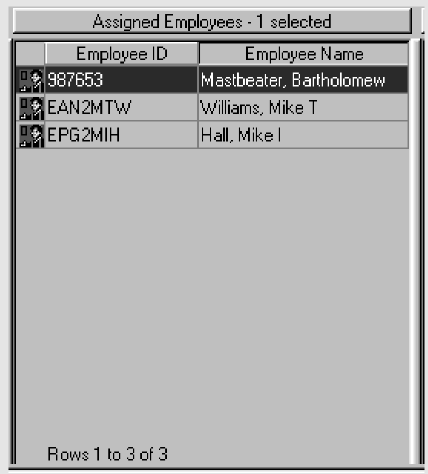


Figure 14.2

Objective 3: Edit an existing employee assignment

In the Employee Assignment Detail dialog box, you can edit the information associated with one of the employees assigned to an activity. The Employee Assignment Detail window consists of four sections: activity information, employee and assignment information, project management information, and last update information. Table 14.2 explains these sections in detail.

To maintain the relationships and integrity of the TimeWizard database, you cannot modify the key field (employee/resource) in assignment records. If you need to change this field, you must delete the assignment and then add it with the new employee/resource.

Editing an employee assignment

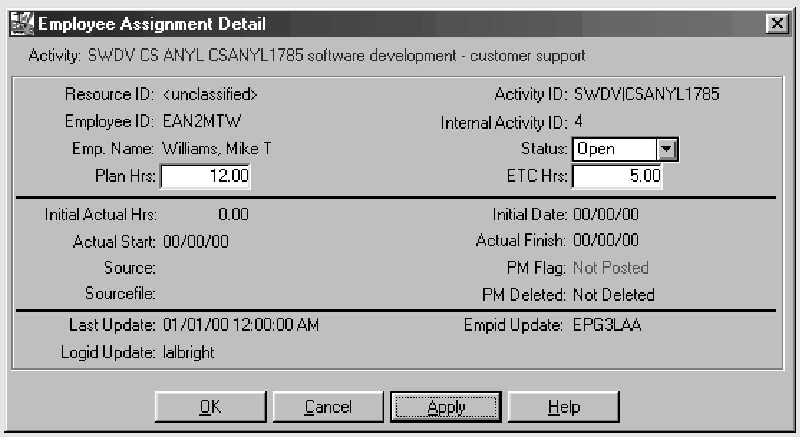


Figure 14.3

To edit an existing employee assignment follow these steps:

1. Click on an assigned employee.
2. Click on Assignment > Edit Assignment to open the Employee Assignment Detail window.(Or double-click on the employee.)
3. Alter the information as needed.
4. Click "Apply" to save the settings but remain in the Employee Assignment Detail window, or click "OK" to save the settings and close the Employee Assignment Detail window.

Example

Figure 14.3 shows an example Employee Assignment Detail dialog box in which we assigned employee Mike T. Williams to an <unclassified> resource assignment for the activity described as "software development - customer support."

Table: 14.2: Employee Assignment Detail Area

Employee Assignment Detail Area	Explanation
Activity:	This area displays the key field values and description of the activity with which the employee assignment is associated.
Resource ID	This indicates whether the resource assignment (with which the employee assignment is associated) is assigned to a specific resource type or <unclassified>.
Employee ID	This indicates the user-defined ID of the assigned employee.
Employee Name	This indicates the name of the assigned employee.
Activity ID	This is a user-defined activity ID.
Internal Activity ID	This is an internal identifier that TimeWizard enters automatically for each activity.
Assignment Status	This specifies whether the employee assignment is open or closed. When an employee assignment is closed, no additional timesheet transactions may be applied.
Plan Hours	This indicates how many hours the task is planned to take for the assigned employee.
Estimated Hours to Complete (ETC)	This indicates the estimated number of hours that the assigned employee has remaining before completing the task.
Initial Actual Hours	This indicates the number of hours associated with the assignment prior to its being entered into TimeWizard.
Initial Date	This indicates the date on which the initial actual hours began.
Actual Start/Finish	TimeWizard automatically generates these dates based on the date of the first timesheet transaction associated with the employee assignment (actual start) and the last transaction date for the resource assignment before it is closed (actual finish).
Source	This indicates the source application that added the assignment. The source might be TimeWizard if the assignment was entered manually or another source if entered by TimeWizard's Table Retrieval or ProjectLink features.
Source File	This indicates the source file from which the information for the assignment originated if it is a source other than TimeWizard.
Project Management (PM) Flag	This indicates to TimeWizard whether update information on the assignment has been posted to a project management system.
PM Deleted	This indicates to TimeWizard whether the assignment has been deleted from a project management system.
Last Update	This indicates the date of the last update to the assignment.
LogID Update	This indicates the login identification of the last person to update the assignment.
Employee ID Update	This indicates the ID of the last person to update the assignment.

Objective 4: Delete an existing employee assignment

To maintain the relationships and integrity of the TimeWizard database, you cannot delete an assignment if there is any time entered for it in any period (open or closed).

Deleting an employee assignment

To delete an existing employee assignment

1. Click on an assigned employee.
2. Click on the Delete Assignment icon (Assignment > Delete Assignment) to delete the selected assignment.
3. TimeWizard displays a prompt, "Are you sure you want to delete the selected assignment?" Click "OK" to delete the assignment.

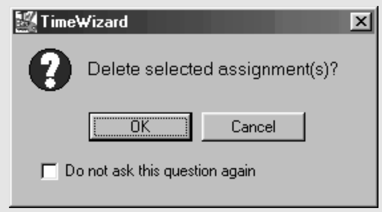


Figure 14.4

Objective 5: Close an existing employee assignment

Once an assignment is closed, the employee cannot enter hours for it on the timesheet. Any time entered on the timesheet will stay as is, but TimeWizard will lock out any further transactions associated with that assignment.

NOTE When you close an assignment, the Actual Finish is calculated based on the last transaction.

Closing an employee assignment

To close an existing employee assignment, follow these steps

1. Click on an assigned employee.
2. Click on the Close Assignment icon (Assignment > Close Assignment) to close the selected assignment.
3. TimeWizard displays a prompt, "Are you sure you want to close the selected assignment?" Click "OK" to close the assignment.

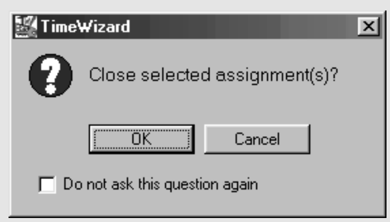


Figure 14.5

Objective 6: Open an existing employee assignment

Once an assignment is opened, it reappears on the timesheet, and work may continue for that employee on that task or project.

NOTE: When you open an assignment, the Actual Finish is cleared.

Opening an employee assignment

To open an existing employee assignment, follow these steps

1. Click on an assigned employee.
2. Click on the Open Assignment icon (Assignment > Open Assignment) to open the selected assignment.
3. TimeWizard displays a prompt, "Are you sure you want to open the selected assignment?" Click "OK" to open the assignment.

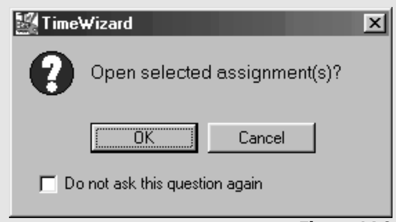


Figure 14.6

Summary

In this chapter, you have learned how make employee assignments to the resource assignments for the activities in your TimeWizard system. In so doing, you authorize your company's employees to work on specific projects and charge time against those projects on their timesheets.

SECTION SIX

Applying Your Business Rules to TimeWizard

Playing by the Rules

You can play just about any game without regard to the rules—from tennis to chess to Candyland—but you just don't get the same outcome of the game. TimeWizard is much the same. Through previous chapters, you have already setup the system so that your employees can charge time against projects on their timesheets. You could say that you have setup the playing board and all the pieces. By applying rules to the game—or rather your company's time accounting process—you improve the outcome and ultimate impact the software will have on your company.

TimeWizard's business rules enable you to determine what each user can or cannot do within the system. For example, you can control where users can go in the system, setup standard work days for different employee types (e.g., full-time or part-time), grant or deny employee access to the activities in TimeWizard, specify what types of time employees can charge on their timesheets (e.g., overtime, shift codes, and pay codes), and decide who has access to certain levels of business reports.

This section includes

Introduction

This introduction to applying your business rules to TimeWizard explains the principles that are the same throughout all of the business rules categories. By understanding these commonalities up front, you will find it easier to grasp the specific areas in which the categories differ.

TimeWizard has eight categories that enable you to set up the following business rules: Permissions, Preferences, Access Lists, Activity Approval Pools, Detail Code Rules, the Standard Text Editor, Report Categories, and Timesheet Rules. Table I.1 explains each business rule category. When you define a business rule, you create a rules profile group. Then, when you assign TimeWizard users to specific rules profile groups, they are—as members of that group—bound by its permissions and restrictions.

Table I.1: Business Rules Categories

Business Rules Category	Explanation
	Permissions grant users admittance to areas of TimeWizard; you specify who can perform which functions within the system.
	Preferences define standard work days, work weeks, and other timesheet and project management settings for your company's employees; you restrict specific users to specific preferences.
	Access Lists specify which TimeWizard users can be assigned to particular activities.
	Activity Pools enable you to specify who has approval authority over which activities in your TimeWizard system.
	Detail Code Rules allow you to restrict TimeWizard users to specific sets of detail code values for their timesheet transactions.
	Standard Text Editor enables you to compose standard notes that users can select for multiple timesheet functions. Note: Users will have the option of choosing a standard note or composing an original note.
	Reports Categories enable you to specify who has access to which report categories. The actual report categories are maintained in the TimeWizard Define Report Categories window and Define Reports window.
Timesheet Rules (menu item)	Timesheet Rules enable you to restrict time submitted for approval by activity or detail code value and to apply specific conditions to submitted time.

Objectives

When you have finished this introduction, you should be able to do the following:

1. Understand Employee and Activity Grouping Methods
2. Understand who Available Members are
3. Use the Quickfilter

Objective 1: Understand Employee and Activity Grouping Methods

One of the necessary steps in creating many of the business rules in TimeWizard is to group together employees and/or activities. By grouping, you are specifying which employees or activities should be treated alike for the specific rule you are creating. In short, you are saying how you want to group your employees or activities for the purpose of assigning them—as members—to specific rules.

The definition of "members" is controlled by your selections in the Employee and Activity Members Grouped By drop-down boxes, located at the bottom of each Business Rules cat-

Table I.2: Employee Grouping Methods

Employee Grouping Method	Explanation
Department	Department categorizes "members" as departments within your company (e.g., administrative support, customer service). In this grouping method, you assign whole departments—and consequently all employees therein—to specific rules profiles.
Employee Code	Employee Code categorizes "members" by employee types (e.g., full-time employees, contract employees, exempt employees, and non-exempt employees). In this grouping method, you assign whole employee types—and consequently all employees therein—to specific rules profiles.
Salary Code	Salary Code categorizes "members" by salary-level groups (e.g., entry-level salary, manager-level salary, and executive-level salary). In this grouping method, you assign whole same-salary-level groups—and consequently all employees therein—to specific rules profiles.
Custom Lists	Custom Lists categorizes "members" as individual employees. This is the most flexible method, as it enables you to assign specific employees to specific rules profile groups.

egory window and in the Activity Groups dialog boxes. Each grouping method controls how your information is categorized and displayed in the selected category window; consequently, you may choose only one method of employee or activity grouping for each category. Changing the method of grouping employees or activities for a specific profile or activity group will remove all existing assignments for that profile or group.

The Employee Members Grouped By menu (located in most Business Rules category windows) groups employees based on any of the three key employee fields. The Activity Members Grouped By menu (located in the Activity Groups dialog boxes for the Access Lists and Activity Approval Pools business rules categories) groups employees based on any of the four custom key activity fields. In addition, for most of the grouping methods (employee or activity) you can select a custom list. Table I.2 explains the TimeWizard employee grouping methods.

Objective 2: Understand who Available Members are

From within the Permissions, Preferences, Detail Codes, and Report Categories business rules categories, an available member may belong only to a single rules profile group, as that set of rules governs all actions by that member. For these business rules categories, the term "available members" is defined as those members not previously assigned to another profile group from within any same Business Rules category.

The same restriction does not apply to the Access Lists and Activity Approval Pools business rules categories. An employee may belong to multiple access lists and activity approval pools. For these busines rules categories, the term "available members" is defined as those members not previously assigned to the same access list or activity approval pool.

Objective 3: Use the Quickfilter

Once you have entered employees and activities into the TimeWizard system, you can retrieve them quickly using the quickfilter located in each Business Rules category window. Rather than having to scroll through entire listings of your company's employees and activities, you can use the quickfilter to narrow the list with which you want to work.

The fields listed across the top are those specified as quickfilter fields in your Custom Field definitions. The drop-down box below each field contains all possible values associated with the field.

By selecting values for one or more quickfilter fields, you can reduce the number of activities or employees retrieved from the TimeWizard database. This can be a benefit for performance and for ease of use.

Using the quickfilter

Figure I.1

To use the quickfilter, follow these steps:

1. Click on the scroll arrow in each quickfilter field and select your desired filtering parameters. Note: To view all activities or employees, select <All> for each quickfilter field.
2. Click "Retrieve."
3. All activities or employees that fall within your selected filtering parameters appear in the appropriate window.

Summary

In this introduction, you have been introduced to the basic concepts and functional commonalities of the TimeWizard Business Rules categories. In the following chapters, you learn the specific steps needed to define each rule for your TimeWizard system.

C H A P T E R 15

Setting Permissions

The Permissions business rules category enables you to control user access throughout the system. Simply put, users must have your permission to access certain functions in TimeWizard. You control access to TimeWizard users by setting up permissions profile groups and assigning employee members to appropriate groups.

After reviewing all of the individual permissions (as shown in Figure 15.2 and defined in Tables 15.2-4), decide how many different sets of rules are needed for permissions. For example, you may have a default list of permissions for most employees, a different set of permissions for managers, and an additional one or two sets for different levels of TimeWizard Administrators. These sets of rules are called profiles.

In addition, think about how you want to group employees for the purpose of assigning them to these sets of rules. Do all employees—without exception—have the same set of permissions based on the department to which they belong? Or is the grouping based on what type of employee they are (e.g., regular employee vs. contractor)? Or if grouping does not fit your organization, you can use custom lists.

Objectives

When you have finished this chapter, you should be able to do the following:

1. Navigate the Permissions area
2. Define a permissions profile
3. Assign members to a permissions profile
4. Edit a permissions profile
5. Delete a permissions profile

Objective 1: Navigate the Permissions area

From the Permissions area, you can create and maintain all TimeWizard permissions profiles. Table 15.1 defines each toolbar icon used in this chapter.

Navigating the Permissions area

To open the Permissions area, follow either of these steps

1. Click on the Permissions icon. 
2. Select Tools > Business Rules > Permissions from the TimeWizard main menu.

Figure 15.1

Table 15.1: Permission Icons

Permissions Icons	Definition
	The Add Permissions icon opens an empty Permissions Profile dialog box.
	The Delete Permissions icon deletes a selected permissions profile.
	The Edit Permissions icon opens the Permissions Profile dialog box with data for a selected permissions profile.

Objective 2: Define a permissions profile

The Permissions Profile categories in the Permissions Profile dialog box refer to typical levels of TimeWizard users. Any profile that you create is not limited to a single category. In other words, you can pick and choose among all of the permission selections to create a unique profile. Tables 15.2-4 explain all of the selections available in the Permissions Profile dialog box.

The Default permissions profile contains all employees who do not belong to any other profile. You cannot delete the default profile. You create new permission profiles so that groups of employees are governed by different permission rules.

Defining a permissions profile

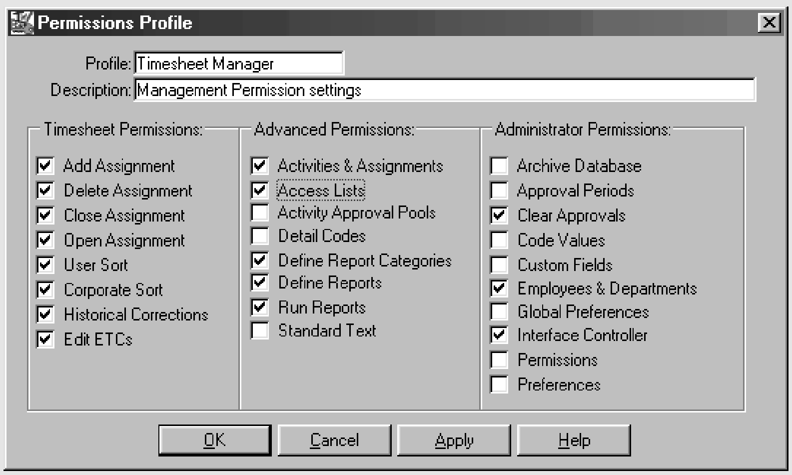


Figure 15.2

To define a permissions profile, follow either of these steps

1. Open the Permissions window (Tools > Business Rules > Permissions).
2. Click the Add Profile icon to open the Permissions Profile dialog box (Profile > Add Profile).
3. Type the name and description of the profile in the text boxes.
4. Check every permission box appropriate to the profile. (See Tables 15.2-4 for detailed explanations.)
5. Click "Apply" to save the settings but remain in the dialog box, or click "OK" to save the settings and close the dialog box.

Example Figure 15.2 shows an example Permissions Profile dialog box in which we created a new permissions profile group named "Timesheet Manager." In this example, the permissions profile group members (who will be managers of TimeWizard timesheets) have a variety of permissions selected from each permissions level to enable them to manage timesheets effectively.

Table 15.2: Timesheet Permissions

Timesheet Permissions	Explanation
Add Assignment	This selection enables the timesheet owner to add assignments from the available list of activities to his or her own timesheet.
Delete Assignment	This selection enables the timesheet owner to delete assignments with no time entries from his or her own timesheet.
Close Assignment	This selection enables the timesheet owner to close assignments on his or her own timesheet against any further time entries.
Open Assignment	This selection enables the timesheet owner to open closed assignments to an open activity on his or her own timesheet.
User Sort	This selection enables the timesheet owner to specify unique sorting criteria for the data on his or her own timesheet. This feature is available for the client-server timesheet only.
Corporate Sort	This selection enables the timesheet owner to specify unique sorting criteria for the data on all timesheets. This feature is available for the client-server timesheet only.
Historical Corrections	This selection enables the timesheet owner to edit timesheet data from closed approval periods and utilizes the TimeWizard SmartAudit feature.
Edit ETCs	This selection enables the timesheet owner to edit the estimate-to-complete for each assignment on his or her own timesheet.

Table 15.3: Advanced Permissions

Advanced Permissions	Explanation
Activities and Assignments	This selection enables the timesheet or department owner to add new activities into TimeWizard and make new assignments for your companies employees.
Business Rules: Access Lists	This selection enables the timesheet or department owner to create access lists that control which employees may be assigned to which activities.
Activity Approval Pools	This selection enables the timesheet or department owner to specify who has approval authority over which activities in your TimeWizard system.
Business Rules: Detail Codes	This selection enables the timesheet or department owner to create detail code profiles that govern what type of time each user may charge on his or her timesheet.
Define Reports Categories	This selection enables the timesheet or department owner to setup categories of business reports to which you later can assign specific reports. In addition, using the Reports Categories business rules feature, you specify who has access to which report categories.
Define Reports	This selection enables the timesheet or department owner to modify the settings of reports based on timesheet data companywide.
Run Reports	This selection enables the timesheet or department owner to run reports based on timesheet data and the categories with which they are associated.
Standard Text	This selection enables the timesheet or department owner to compose standard notes that users can select for multiple timesheet functions. Note: Users will have the option of choosing a standard note or composing an original note.

Table 15.4: Administrator Permissions

Administrator Permissions	Explanation
Archive Database	This selection enables the TimeWizard administrator to save old data and remove it from the TimeWizard database.
Approval Periods	This selection enables the department owners or activity owners to generate and maintain your company's approval periods.
Clear Approvals	This selection enables the TimeWizard administrator to clear timesheet approvals for an open approval period.
Code Values	This selection enables the TimeWizard administrator to create and edit code values for TimeWizard fields.
Custom Fields	This selection enables the TimeWizard administrator to create and edit custom fields for activities, employees, and detail codes.
Employees and Departments	This selection enables the TimeWizard administrator to generate and maintain your company's employee records and maintain a departmental approval hierarchy in your TimeWizard system.
Global Preferences	This selection enables the TimeWizard administrator to set system-wide preferences such as whether your approval process is departmental- or activity-based, the conditions under which you want to automatically close activities and resource assignments, and the duration of the audit time in the Smart Audit feature.
Interface Controller	This selection enables the TimeWizard administrator to generate and maintain interfaces between TimeWizard and your company's other applications.
Business Rules: Permissions	This selection enables the TimeWizard administrator to generate and maintain Permissions business rules for TimeWizard users.
Business Rules: Preferences	This selection enables the TimeWizard administrator to generate and maintain Preferences business rules for TimeWizard users.

Objective 3: Assign members to a permissions profile

When you assign TimeWizard users to specific permissions profile groups, they are—as members of that group—bound by its permissions and restrictions. All members start out in the <default> permission profile. Create all the additional permissions profiles you need. Then decide how to group employees (i.e., by department, salary, employee code, or custom lists). As you select a profile on the left, you see the current members of that profile on the right. Move the members on the right (from the <default> group) into the appropriate profile on the left.

Assigning members to a permissions profile

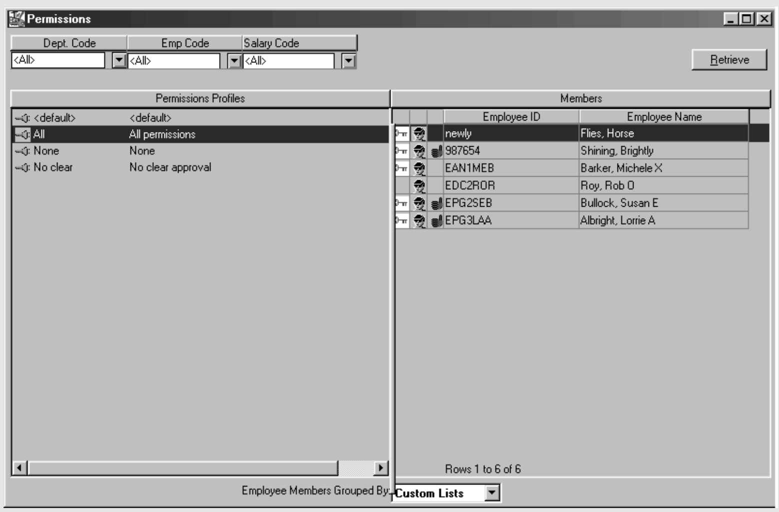


Figure 15.3

To assign members to a permissions profile, follow either of these steps

1. Open the Permissions window (Tools > Business Rules > Permissions).
2. Choose an employee grouping method (see “Employees Grouping Methods,” this chapter).
3. To view all available members, select “<Default>” in the Permissions Profile window (the members listed are “members” of the “profile group” named “<Default>”).

NOTE: The <default> profile can be modified but never deleted.

4. Drag and drop each appropriate employee from the list in the Members box to the appropriate profile in the Permission Profiles box.

In the members box, you can sort the display lists by clicking on the Employee ID tab and the Employee Name tab.

In addition, you can multiple select members by using the shift or control keys on your keyboard.

Objective 4: Edit a permissions profile

When you edit a permissions profile, you automatically change the permission settings for all of its members.

Editing a permissions profile

To edit a permissions profile, follow these steps:

1. Select a Permissions Profile.
2. Click the Edit Profile icon to open the Permissions Profile dialog box (Profile > Edit Profile).
3. Modify the profile information as desired.
4. Click “Apply” to save the settings but remain in the dialog box, or click “OK” to save the settings and close the dialog box.

Objective 5: Delete a permissions profile

When you delete a permissions profile, its members return to the <Default> group. You cannot delete the <Default> profile, because its members are those not belonging to any other group.

Deleting a permissions profile

To delete a permissions profile, follow these steps

1. Select the desired profile.
2. Click the Delete Profile icon (Profile > Delete Profile). Members of deleted profiles

Figure 15.4

Summary

In this chapter, you have learned how to control access to TimeWizard users by setting up permissions profile groups and assigning members to appropriate groups.

CHAPTER 16

Setting Up Preferences

You can create preference business rules groups to define standard work days, work weeks, and other timesheet and project management settings for your company's employees. You then assign members to these groups. You can create as many preference profiles groups as needed, but each employee may be assigned to only one—e.g., one employee may have a standard work day of four hours, while another may have a standard work day of eight hours.)

Objectives

When you have finished this chapter, you should be able to do the following:

1. Navigate the Preferences area
2. Define a preferences profile
3. Assign members to a preferences profile
4. Edit a preferences profile
5. Delete a preferences profile

Objective 1: Navigate the Preferences area

From the Preferences area, you can create and maintain all TimeWizard Preference profiles and manage the memberships to each. Table 16.1 defines each toolbar icon used in this chapter.

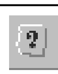
Navigating the Permissions area

To open the Preferences area, follow either of these steps:

1. Click on the Preferences icon. 
2. Select Tools > Business Rules > Preferences from the TimeWizard main menu.

Figure 16.1

Table 16.1: Preferences Icons

Preferences Icons	Definition
	The Add Preferences icon opens an empty Preferences Profile dialog box.
	The Delete Preferences icon deletes a selected permissions profile.
	The Edit Preferences icon opens the Preferences Profile dialog box with data for a selected preferences profile.

Objective 2: Define a preferences profile

The Default preferences profile contains all employees who do not belong to any other profile. You can rename—but not delete—the default profile. You create new preferences profiles so that groups of employees are governed by different preference rules. Tables 16.2-5 explain all of the selections available in the Preferences Profile dilaog box.

TIP

The Timer Logoff (minutes) is a unique client/server feature that serves as additional system security. This feature can guard against two potential problems:

1. Possible access to information and permissions that otherwise would be restricted. This could occur when employees who are logged on to TimeWizard leave it running and leave their workstations unattended for a period of time.
2. Resource overload. This could occur (depending on your DBMS server licensing and setup) if many users are logged on to TimeWizard and are, therefore, connected to the TimeWizard database.

Defining a preferences profile

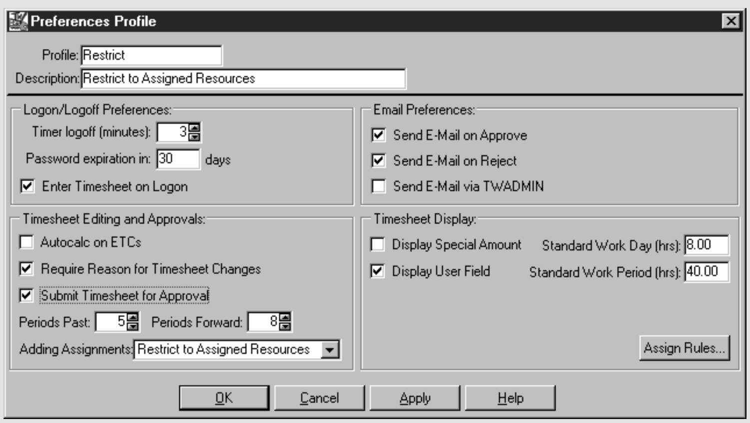


Figure 16.2

To define a preferences profile, follow these steps:

1. Open the Assign Preferences window (Tools > Business Rules > Preferences).
2. Click on the Add Preferences icon to open the "Preferences Profile" dialog box (Profile > Add Profile).
3. Type the profile name and description in the text boxes.
4. Specify profile settings (see Tables 16.2-5).
5. Click "Apply" to save the setting but remain in the dialog box, or click "OK" to save the setting and close the dialog box.

Table 16.2: Logon/Logoff Preferences

Logon/Logoff Preferences	Explanation
Timer Logoff (minutes)	Timer Logoff (minutes) is a unique feature that serves as additional system security. The Timer Logoff feature automatically terminates TimeWizard at the predetermined logoff time if the user has stopped working with TimeWizard. The default is set to "0" minutes, which provides unlimited time without the application being terminated. The system supports a range of from 0 minutes to 1,000 minutes.
Password Expiration	This option enables you to specify the exact number of days before the employee must change his or her login password.
Enter Timesheet on Login	This option enables employees to enter directly into the timesheet when they log on successfully.

Table 16.3: Email Preferences

Email Preferences	Explanation
Send E-Mail on Approve	Send E-Mail on Approve enables TimeWizard to automatically send an e-mail notification to the timesheet owner upon timesheet approval. If you do not select this function, you will have to send the e-mail notification yourself. To receive the e-mail message, the TimeWizard timesheet owner's e-mail address must be entered in the Email Login text box (Employees > Employee Detail window). Similarly, the TimeWizard.*enterprise* timesheet owner's Internet e-mail address must be entered in the Domain text box (Employees > Employee Detail window).
Send E-Mail on Reject	Send E-Mail on Reject enables TimeWizard to automatically send an e-mail notification to the timesheet owner upon timesheet rejection. If you do not select this function, you will have to send the e-mail notification yourself. To receive the e-mail message, the TimeWizard timesheet owner's e-mail address must be entered in the Email Login text box (Employees > Employee Detail window). Similarly, the TimeWizard.*enterprise* timesheet owner's Internet e-mail address must be entered in the Domain text box (Employees > Employee Detail window).
Send E-Mail via TWADMIN	Send E-Mail via TWADMIN enables TimeWizard to automatically send all e-mail notifications via the TimeWizard Administrator.. To use this feature, a fully-qualified Internet mail account must be set up for the user "TWADMIN." The same password used to access the TimeWizard Administrator application with the Login ID, "TWADMIN," must be assigned to this e-mail account.

Table 16.4: Timesheet Editing Preferences

Timesheet Editing Preferences	Explanation
Autocalc on ETCs	Autocalc on ETCs enables TimeWizard automatically to decrement the ETC hours by the number of hours that were entered on the timesheet. If disabled, TimeWizard does not perform this task automatically. The default setting is disabled. (If Autocalc is turned on, when time is deleted from an open period, the time is added back into the ETC.)
Require Reason for Timesheet Changes	This option requires timesheet owners to leave a reason why they are changing timesheet entries if the SmartAudit time limit for that entry has lapsed. For example, if on Friday an employee attempts to change a time entry from Monday (and the audit time has lapsed), TimeWizard requires a reason for the change.
Submit Timesheet for Approval	This option enables employees to submit their own timesheets for approval by department or activity owners.
Periods Past	This option enables you to specify the exact number of periods past that the employee may access through his or her timesheet.
Periods Forward	This option enables you to specify the exact number of periods forward that the employee may access through his or her timesheet.
Adding Assignments	For employees who have permission to add assignments to their timesheets, this option enables you to specify whether they are resticted to assigned resources (skill set descriptions) or they can add assignments as an <unclassified> resource.

Table 16.5: Timesheet Display Preferences

Timesheet Display Preferences	Explanation
Display Special Amount Field	This preference enables you to display a field for special rates (e.g., bonus, special billing, etc.) on the detail line on the timesheet.
Display User Field	This preference enables you to display a user-defined field of up to 255 characters on the detail line on the timesheet.
Standard Work Day (hrs.)	Standard work day (hrs.) allows you to define the number of hours in a standard work day for your company's employees. The default is set to "8" hours, but the system supports a range of from 1 hour to 24 hours. Based on your "standard" selections, TimeWizard color codes daily totals that are less than or more than the predefined standard for each employee.
Standard Work Period (hrs.)	Standard work week (hrs.) allows you to define the number of hours in a standard work week for your company's employees. The default is set to "40" hours. Based on your "standard" selections, TimeWizard color codes weekly totals that are less than or more than the predefined standard for each employee.
Assign Rules ...	This command button opens the Timesheet Rules window, in which you can assign defined timesheet rules to preference profiles. Timesheet rules restrict hours that can be submitted for specific activities or detail code values under specified conditions. See Chapter 20: "Defining Timesheet Rules."

Objective 3: Assign members to a preferences profile

When you assign TimeWizard users to specific preferences profile groups, they are—as members of that group—bound by its preferences and restrictions. All members start out in the <default> preferences profile. Create all the additional preferences profiles you need. Then decide how to group employees (i.e., by department, salary, employee code, or custom lists). As you select a profile on the left, you see the current members of that profile on the right. Move the members on the right (from the <default> group) into the appropriate profile on the left.

TIP

In the members box, you can sort the display lists by clicking on the Employee ID tab and the Employee Name tab.

In addition, you can multiple select members by using the shift or control keys on your keyboard.

Assigning members to a preferences profile

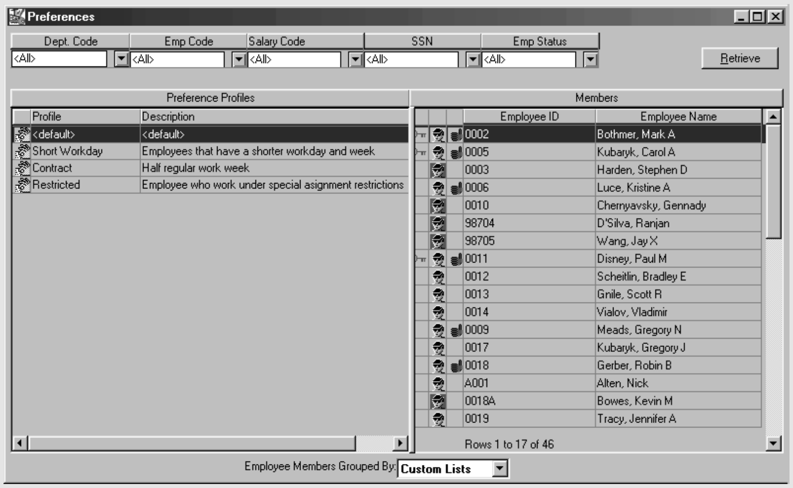


Figure 16.3

To assign members to a preferences profile, follow these steps:

1. Choose an employee grouping method (see "Employee Grouping Methods," this chapter).
2. Select "<Default>" in the Preferences Profile window to view all available members (the members listed are "members" of the "profile group" named "<Default>").
3. Drag and drop each appropriate employee from the list in the Members box to the appropriate profile in the Preferences Profiles box.

Example In Figure 16.2, we created a new Preferences profile named "Short Workday" for employees who have a shorter workday and work week. According to the set rules of this example profile (among other preferences), a typical workweek for its members—the employees listed in Figure 16.3—consists of a 7-hour work day and a 35-hour standard work week.

Objective 4: Edit a preferences profile

When you edit a preferences profile, you automatically change the preference settings for all of its members.

Editing a preferences profile

To edit a preferences profile, follow these steps:

1. In the Preferences window, select a preference profile from the Preference Profiles box.
2. Click the Edit Profile icon or double-click on the profile to open the Preferences Profile dialog box (Profile > Edit Profile) for the selected profile.
2. Edit the profile information.
3. Click "Apply" to save the settings but remain in the dialog box, or click "OK" to save the settings and close the dialog box.

Objective 5: Delete a preferences profile

When you delete a preferences profile, its members return to the <Default> group. You cannot delete the <Default> profile.

Deleting a preferences profile

To delete a preferences profile, follow these steps:

1. Select the desired profile.
2. Click the Delete Profile icon (Profile > Delete Profile). Members of deleted profiles return to the <Default> group. (Remember: You cannot delete the <Default> profile.)

Summary

In this chapter, you have learned how to create preference profile groups—to define standard work days, work weeks, and other timesheet and project management settings for your company's employees—and then assign members to these profiles.

CHAPTER 17

Creating Access Lists

Assigning an access list to an activity enables you to have greater control over the way assignments to an activity are made. By creating access lists, you limit the list of employees who have "access" to a specific activity. In other words, an access list specifies which TimeWizard users can be assigned to a particular activity.

Your work with access lists follows a three-step process:

1. Define activity groups (in the Activity Groups dialog box).
2. Assign activities to the activity groups (in the Activity Groups dialog box).
3. Assign members to the activity groups (in the Activity Groups dialog box), thus defining an access list.

Objectives

1. Navigate the Access Lists area
2. Define an activity group
3. Assign available activity members to an activity group
4. Assign available employee members to an activity group
5. Edit an activity group
6. Delete an activity group

Objective 1: Navigate the Access Lists area

From the Access Lists area, you can create and maintain all TimeWizard Access Lists. Table 17.1 defines each toolbar icon used in this chapter.

Navigating the Access Lists area

To open the Access Lists area, follow either of these steps:

1. Click on the Access Lists icon. 
2. Select Tools > Business Rules > Access Lists from the TimeWizard main menu.

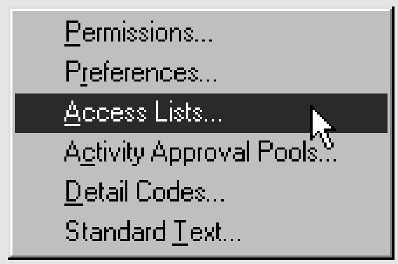


Figure 17.1

Table 17.1: Access Lists Icons

Access Lists Icons	Explanation
	The Add Activity Groups icon opens the Activity Group dialog box so that you can create a new activity group.
	The Delete Activity Groups icon deletes a selected activity group profile.
	The Edit Activity Group icon opens the Activity Group dialog box so that you can edit an existing activity group.

Objective 2: Define an activity group

The first step in creating access lists is to create groups of activities—activity groups—to which you will later grant access to selected employee members. In this objective, you create and name the group to which you will assign activity members.

Defining an activity group

To define an activity group, follow these steps:

1. Click the Add Activity Group icon to open the Activity Groups dialog box (Activity Group > Add Group) (see Figure 9.8).
2. Type the activity group name and description in the text boxes.
3. Click "Apply" to save the settings but remain in the dialog box, or click "OK" to save the settings and close the dialog box.

NOTE: Once you click on Apply, the retrieve button is enabled so you can assign activity members.

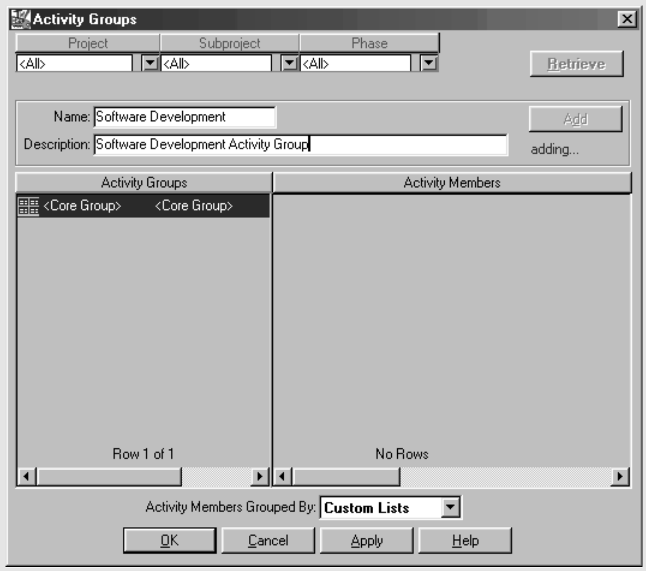


Figure 17.2

Example Figure 17.2 shows an example Activity Groups dialog box in which we are adding a new activity group named "Software Development."

Objective 3: *Assign available activity members to an activity group*

Once you have defined an activity group, the next step is to assign individual activities—activity members—associated with the larger activity group. Available activities are those activities not assigned to another activity group. All activity members start out in the <Core Group> activity group. Create all the additional activity groups you need. Then decide how to group activities—i.e., by any of the four custom key Activity fields you defined previously or by custom lists. As you select an activity group on the left, you see the current activity members of that activity group on the right. Move the members on the right (from the <Core Group>) into the appropriate activity group on the left.

Assigning available activities to an activity group

To assign available activities to an activity group, follow these steps:

1. In the Access Lists window, click the tab of the activity group to which you want to assign activities.
2. Click the Edit Activity Group icon (or double-click on the appropriate activity group tab) to open the Activity Groups dialog box.
3. Specify an activity member grouping method.
4. Specify your quickfilter parameters (see “Using the Quickfilter,” this chapter).
5. Click “Retrieve” to display available activities in the Members box (the activities listed are “members” of the <Core Group>).
6. Drag and drop available <Core Group> activity members from the Members box onto a desired activity in the Activity Groups box.
7. Click “OK” to return to the Access Lists window.

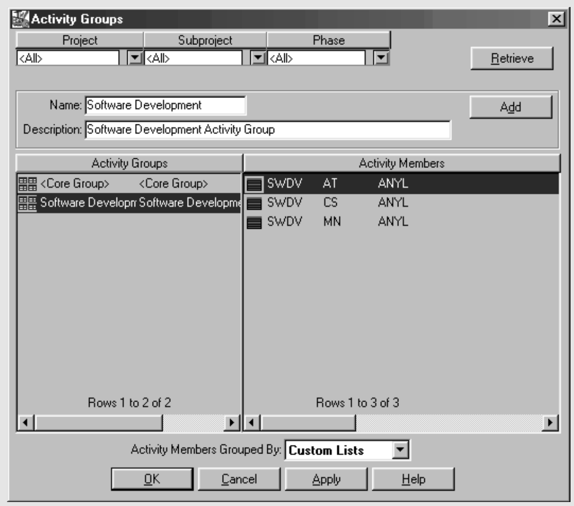


Figure 17.3

Example Figure 17.3 shows an example Activity Groups window in which we have assigned three activity member—SWDV/AT/ANYL, SWDV/CS/ANYL, and SWDV/MN/ANYL—to the activity group named “Software Development. In this example, we chose to group activity members by custom lists.

To edit the activity membership for an activity group, move the appropriate activities from the membership area on the right back to the <Core Group> activity group on the left.

In the Activity Members box, you can sort the display lists by clicking on the Activity fields tabs.

In addition, you can multiple select activity members by using the shift or control keys on your keyboard.

Objective 4: Assign available employee members to an activity group

When you assign available employee members to an activity group, you allow them to create assignments for any of the activities in the activity group. Employees who are not assigned to the activity group do not have access to those activities.

Available employees are those who are not already assigned to the selected activity group. A single employee may be assigned access to multiple activity groups. Create all the additional activity groups you need. Then decide how to group employees. As you select an activity group from the tabs at the top of the Access Lists window, you can see available employees on the right. Move the appropriate employees on the right into the membership area on the left.

To edit the employee membership for an activity group access list, move the appropriate employees from the membership area on the left back to the available employees area on the right.

In the Activity Members box, you can sort the display lists by clicking on the Activity fields tabs.

In addition, you can multiple select activity members by using the shift or control keys on your keyboard.

Assigning available employee members to an activity group

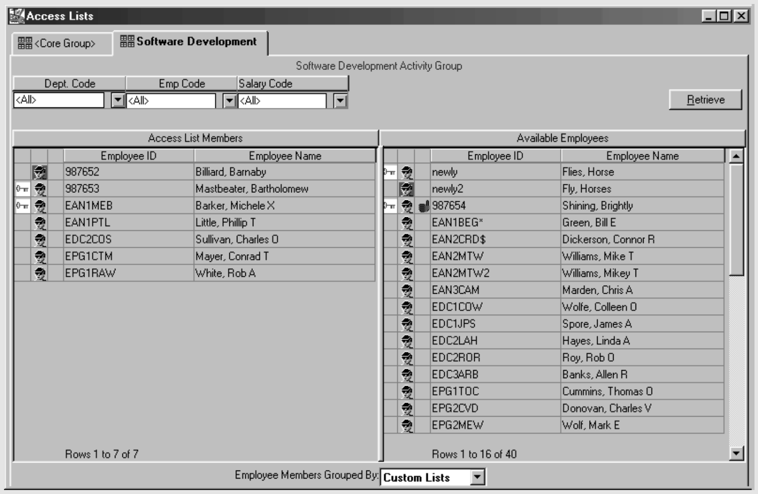


Figure 17.4

To assign members to an activity group, follow these steps:

1. In the Access Lists window, click the tab of the activity group to which you want to assign employees.
2. Specify an employee grouping method (see "Employees Grouping Methods," this chapter).
3. Specify your quickfilter parameters (see "Using the Quickfilter," this chapter).
4. Click "Retrieve" to display available employees.
5. Drag and drop each appropriate employee from the Available Employees box to the Access List Members box.

   To reverse the Access List assignment, simply drag and drop the employee from the Acces List Members box back to the Available Employees box.

Example Figure 17.4 shows an example activity group access list. From the list of available employees on the right, we assigned seven employees access to the activity group "Software Development." In this example, we chose to group activity members by custom lists.

Another example could be to group employees by department and then assign SE to the Software Development tasks access list.

Objective 5: Edit an activity group

The Edit Activity Group dialog box enables you to rename and change the description for an existing activity group.

Editing an activity group

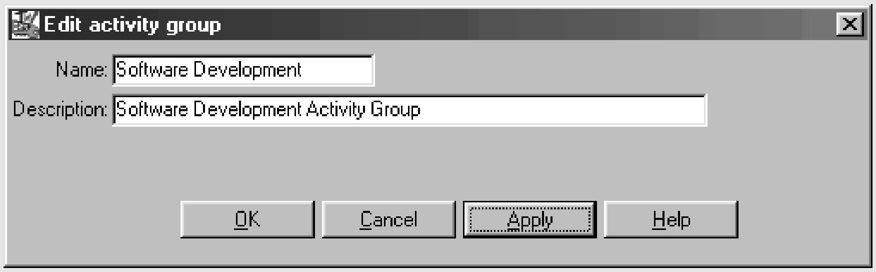


Figure 17.5

To edit an activity group, follow these steps:

1. In the Access Lists window, click the tab of the activity group to which you want to make corrections.
2. Click the Edit Activity Group icon to open the Activity Groups dialog box (Activity Group > Edit Group).
3. Click "Retrieve" to display available activities.
4. In the Activity Groups box, double-click on the activitiy group you want to edit to open the Edit Activity Group dialog box.
5. Edit the activity group information (i.e., name or description) as necessary.
6. Click "OK" to save the changes and return to the Activity Groups dialog box.

Objective 6: Delete an activity group

When you delete an activity group, its activity members return to the <Core Group>, and its employee members return to the Available Employees box for other activity groups.

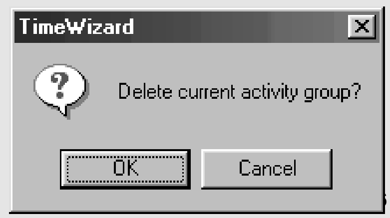
NOTE

Activities belonging to the deleted activity groups return to the <Core> group. Consequently, employees belonging to the deleted activity groups return to the available employees list.

Deleting an Activity Group

To delete an activity group, follow these steps:

1. In the Access Lists window, click the tab of the activity group that you want to delete.
2. Click the Delete Activity Group icon (Profile > Delete activity group).
3. TimeWizard displays a confirmation window: "Delete current activity group?" Click "OK" to delete the activity group.



Summary

In this chapter you have learned to create groups of activities and then assign employee members to those groups. In so doing, you allow those employees to create assignments for the activities in the activity groups.

CHAPTER 18

Creating Activity Approval Pools

If you chose integrated approvals as your approval process, you need to set up activity approval pools. Creating activity approval pools enables you to specify who can approve time charged to specific activities. An activity approver, who is called an activity owner, is usually a project team leader who is authorized to approve time for a particular project's activities. An activity owner does not need to be a department owner to approve time for employee assignments.

Your work with project approval pools follows a three-step process:

1. Define activity groups (in the Activity Groups dialog box).
2. Assign activity members to the activity groups (in the Activity Groups dialog box).
3. Assign employee members to the activity groups (in the Activity Approval Pools window), thus defining an activity approval pool.

Objectives

1. Navigate the Activity Approval Pools area
2. Define an activity group
3. Assign available activity members to an activity group
4. Assign available employee members to an activity approval pool
5. Edit an activity group
6. Delete an activity group

Objective 1: Navigate the Activity Approval Pools area

From the Activity Approval Pools area, you can create and maintain all TimeWizard activity approval pool activity groups. Table 18.1 defines each toolbar icon used in this chapter.

Navigating the Activity Approval Pools area

To open the Activity Approval Pools area, follow either of these steps:

1. Click on the Activity Approval Pools icon. 
2. Select Tools > Business Rules > Activity Approval Pools from the TimeWizard main menu.

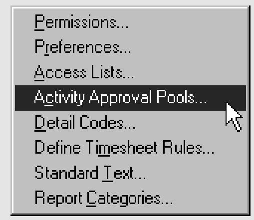


Figure 18.1

Table 18.1: Activity Approval Pools Icons

Activity Approval Pools Icons	Explanation
	The Add Activity Groups icon opens the Activity Group dialog box so that you can create a new activity group.
	The Delete Activity Groups icon deletes a selected activity group profile.
	The Edit Activity Group icon opens the Activity Group dialog box so that you can edit an existing activity group.

Objective 2: Define an activity group

The first step in creating an activity approval pool is to create an activity group. In this objective, you add and name the group. In Objective 3, you assign activities (activity members) to the group. Finally, in Objective 4, you assign employee members to the group. These employee members are activity owners, who have the authority to approve time for all employee assignments associated with the group's activity members.

Defining an activity group

To define an activity group, follow these steps:

1. After opening the Activity Approval Pools window, click the Add Activity Group icon or select Activity Group > Add Activity Group from the main menu to open the Activity Groups dialog box.
2. Type the profile name and description in the text boxes at the top of the dialog box.
3. Click "Apply" to save the settings but remain in the dialog box, or click "OK" to save the settings and return to the Activity Approval Pools window. If you remain in the dialog box, continue with Objective 3, step 3, to assign activity members.

TIP: Once you click on Apply, the Add button in the dialog box is enabled, and you can add additional activity groups without exiting.

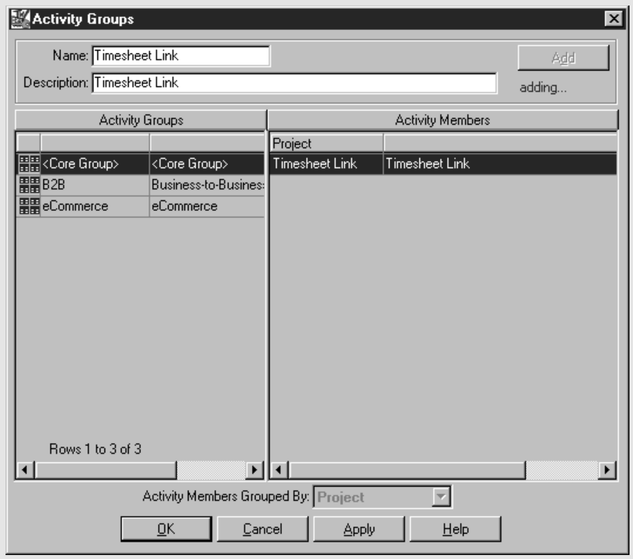


Figure 18.2

Objective 3: Assign available activity members to an activity group

Once you have defined an activity group, the next step is to assign individual activities—activity members—associated with the larger activity group. Available activities are those activities not assigned to another activity group. All activities start out in the <Core Group> activity group. Define all the additional activity groups you need (see Objective 2). Then decide how to group activities—i.e., by any of the key activity fields you defined previously in the Custom Fields area (from activity field 1 through field 4). As you select an activity group on the left of the Activity Groups dialog box, you see the current activity members of that activity group on the right. When the <Core Group> is selected, you can move available activities on the right into the appropriate activity group on the left.

Assigning available activity members to an activity group

To assign available activity members to an activity group, follow these steps:

1. In the Activity Approval Pools window, click on the activity group to which you want to assign activities.
2. Click the Edit Activity Group icon or select Activity Groups > Edit Activity Group from the menu to open the Activity Groups dialog box.
3. Specify activity grouping method in the Activity Members Grouped By drop-down box (see the introduction of this chapter).

   NOTE You must use the same grouping method for each activity group in the Activity Approval Pools area.
4. With <Core Group> selected on the left, drag and drop available <Core Group> activities from the Activity Members box on the right onto the desired activity group on the left.
5. Click "Apply" to save your assignments and remain in the dialog box or click "OK" to save and exit the Activity Groups box.

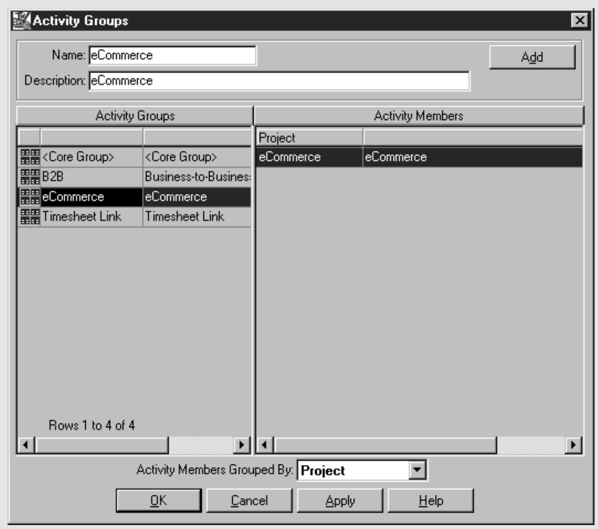


Figure 18.3

6. While the Activity Groups dialog box is open, click on any activity group on the left to view its assigned members on the right.

Example Figure 18.3 shows an example Activity Groups window in which we have assigned one activity member to the activity group named "eCommerce." In this example, we chose to group activity members by Project.

You can multiple-select activity members by holding down the Shift key and clicking on the top and bottom rows of the series you want to select or by holding down the Control key and clicking on each row you want.

Objective 4: Assign available employee members to an activity approval pool

When you assign available employee members to an activity group, you grant approval authority for all employee assignments associated with the activities in the activity group. Other employees, who are not assigned to the activity group, do not have approval authority over those activities. An activity group may have more than one approval pool member; however, only one member's approval will be required for that group of activities. Additional pool members are for backup purposes.

Available employees are those who are not already assigned to the selected activity group. A single employee may be assigned to multiple activity groups. Define all the additional activity groups you need. As you select an activity group in the upper frame of the Activity Approval Pools window, you can see available employees in the lower right frame. Move the appropriate employees from the right into the Approval Pool Members area in the lower left frame.

You must assign activity members to an activity group before assigning employee members to the associated activity approval pool.

To edit the employee membership for an activity group, move the appropriate employees from the membership area (on the left) back to the available employees area on the right.

Example Figure 18.4 shows an example activity approval pool. From the list of available employees on

Assigning available employee members to an activity approval pool

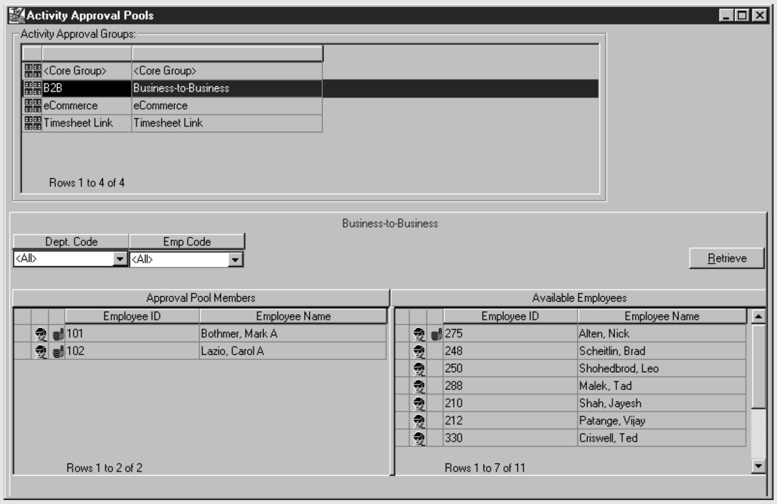


Figure 18.4

To assign available employee members to an activity approval pool, follow these steps:

1. In the Activity Approval Pools window, click on the activity group to which you want to assign employees.
2. Specify your quickfilter parameters (see "Using the Quickfilter," in the introduction of this section). If you choose any parameters other than <All>, click "Retrieve" to display the filtered list of employees.
3. Drag and drop each appropriate employee from the Available Employees box to the Approval Pool Members box.

NOTE: To reverse the activity approval pool assignment, simply drag and drop the employee from the Approval Pool Members box back to the Available Employees box.

the right, we assigned two employees approval authority over the activities in the activity group "B2B."

NOTE: In the Approval Pool Members box and the Available Employees box, you can sort the display lists by clicking on the Employee ID or Employee Name Column headings.

In addition, you can multiple-select activity members by holding down the Shift key and clicking on the top and bottom rows of the series you want to select or by holding down the Control key and clicking on each row you want.

Objective 5: Edit an activity group

The Activity Groups dialog box enables you to rename and change the description for an existing activity group. You can change the membership of an activity group in the same dialog box.

Editing an activity group

To edit an activity group, follow these steps:

1. In the Activity Approval Pools window, click on the Edit Activity Group icon to open the Activity Groups dialog box (Activity Groups > Edit Activity Group).
2. In the Activity Groups dialog box, click on the activity group you want to edit.
3. To edit the group name or description, make the desired change in the text boxes in the top frame.
4. To edit the activity membership of the group, drag the appropriate activities from the membership frame on the right to the <Core Group> activity group on the left. Activities moved to the <CoreGroup> are available to be assigned.
5. Click "Apply" to save the settings but remain in the dialog box, or click "OK" to save the settings and close the dialog box.

Objective 6: Delete an activity group

When you delete an activity group, its activity members return to the <Core Group>, and its employee members return to the Available Employees frame to be available for other activity groups. Deleting an activity group deletes the corresponding activity approval pool.

Deleting an activity group

To delete an activity group, follow these steps:

1. In the Activity Approval Pools window, click on the activity group that you want to delete.
2. Click on the Delete Activity Group icon (Activity Groups > Delete Activity Group).
3. TimeWizard displays a confirmation window: "Delete current activity group?" Click "OK" to delete the activity group.

Figure 18.6

Summary

In this chapter, you have learned to create activity approval pools that assign approval authority over specific activities to specific employees.

CHAPTER 19

Setting Up Detail Code Rules

The detail code fields and detail code values that you entered previously enable employees to associate different types of data with specific timesheet transaction entries. For example, if your company's Payroll managers need TimeWizard to capture pay code information, you would set up a detail code custom field entitled "Pay Codes." For TimeWizard to capture specific information within this custom field category, you would add specific pay code values, such as "regular time" or "overtime."

Creating detail code business rules enables you to restrict TimeWizard users to specific sets of Detail Code values for their timesheet transactions. To further enhance those restrictions, you can associate the detail code business rules with activity groups so that employees' access to detail codes is based on the activity to which they are assigned. For example, just because the pay code value "overtime" exists does not mean that every employee is allowed to charge overtime to a timesheet. TimeWizard enables you to specify that only a certain group of employees working on a certain activity can charge overtime to their timesheets (for that activity only).

TIP: If you want the same "rules" to apply to employees for all activities, then you can skip objectives 2-5, because all activities would be in the "core" activity group. Later, to create exceptions to this setup, you may create new activity groups and associate new detail code profiles with each group.

Objectives

1. Navigate the Detail Codes area
2. Define an activity group
3. Assign available activity members to an activity group
4. Edit an activity group
5. Delete an activity group
6. Define detail code profiles for an activity group
7. Assign employee members to detail code profiles

8. Edit a detail code profile
9. Delete a detail code profile

Objective 1: Navigate the Detail Codes area

The Rules for Detail Code drop-down box at the top of the Detail Code Rules window contains the detail code fields.

From the Detail Code Rules area, you can create and maintain all TimeWizard detail code activity groups and detail code profiles. Table 19.1 defines each toolbar icon used in this chapter.

Navigating the Detail Codes area

To open the Detail Codes area, follow either of these steps:

1. Click on the Detail Codes icon. 
2. Select Tools > Business Rules > Detail Codes from the TimeWizard main menu.

Figure 19.1

Table 19.1: Detail Codes Icons

Detail Codes Icon	Definition
	The Add Profile icon opens an empty Detail Codes Profile dialog box.
	The Delete Profile icon deletes a selected detail codes profile.
	The Edit Profile icon opens the Detail Codes Profile dialog box with data for a selected Detail Codes profile.
	The Add Activity Group icon opens the Activity Groups dialog box.
	The Delete Activity Group icon deletes a selected activity group.
	The Edit Activity Group icon opens the Activity Groups dialog box.

Objective 2: Define an activity group

The first step in creating detail code rules is to create activity groups for which you will later create detail profiles and assign selected employee members. In this objective, you create and name the activity group to which you will assign activity members.

Defining an activity group

To define an activity group, follow these steps:

1. Click on the Detail Codes icon to open the Detail Code Rules window.
2. Click on the Rules for Detail Code drop-down box (Figure 19.2) to select the Detail Code field for which you want to create a profile group. Scroll through the drop-down list to make the selection, e.g., "Cost Type."
3. Click the Add Activity Group icon to open the Activity Groups dialog box (Activity Group > Add Group).
4. In the Activity Groups dialog box, type the profile name and description in the text boxes (Figure 19-3).
5. Click "Apply" to save the new settings and keep the dialog box open, or click "OK" to save the settings and close it.

NOTE Once you click on Apply, the Retrieve button is enabled so you can assign activity members to the newly-created activity group(s).

Figure 19.2

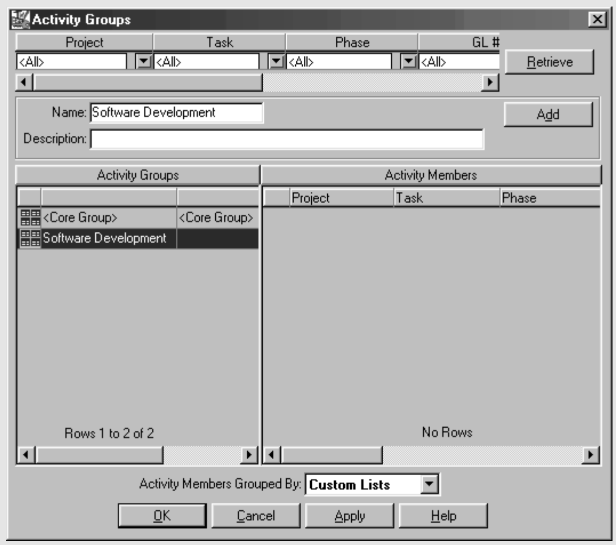


Figure 19.3

TIP If you want the same "rules" for all activities, then you can skip objectives 2-5, because all activities would be in the "core" activity group.

Example Figure 19.3 shows an example Activity Groups dialog box in which we have added a new activity group named "Software Development" for the detail code "Cost Type."

Objective 3: Assign available activity members to an activity group

Once you have defined an activity group, the next step is to assign individual activities—activity members—which will populate the activity group(s). Available activities are those which have not already been assigned to another activity group. All activity members start out in the <Core Group> activity group. Once you have created all the activity groups you need, you must decide how to group the activities themselves—i.e., by any of the four custom key Activity fields you defined previously, or by custom lists. As you select a newly-created activity group on the lower left of the Detail Code Rules window, you will see the activity members already a part of that activity group on the right. Click on the <Core Group> on the left to display the available activities on the right. Next, click on and drag the desired activity members on the right into the appropriate activity group on the left.

NOTE: Changing the method of grouping activity members for activity groups will remove all existing assignments of activity members to activity groups (see Section 6 Introduction, Objective 1, "Understand Employee and Activity Grouping Methods" for details).

Assigning available activity members to an activity group

To assign available activities to an activity group, follow these steps:

Once you have created an activity group, the next step is to assign individual activities to that activity group.

1. In the upper left list of the Detail Code Rules window, highlight the activity group to which you want to assign activities .
2. Click the Edit Activity Group icon to open the Activity Groups dialog box (Figure 19.4).
3. At the bottom of the dialog box, specify an activity grouping method.
4. Specify your quickfilter parameters (see Section 6, Objective 3, "Use the Quickfilter" for details).
5. Click "Retrieve" to display available activities in the Members box (the activities listed are "members" of the <Core Group>).
6. Drag and drop available activity members from the Members box onto a desired activity in the Activity Groups box.

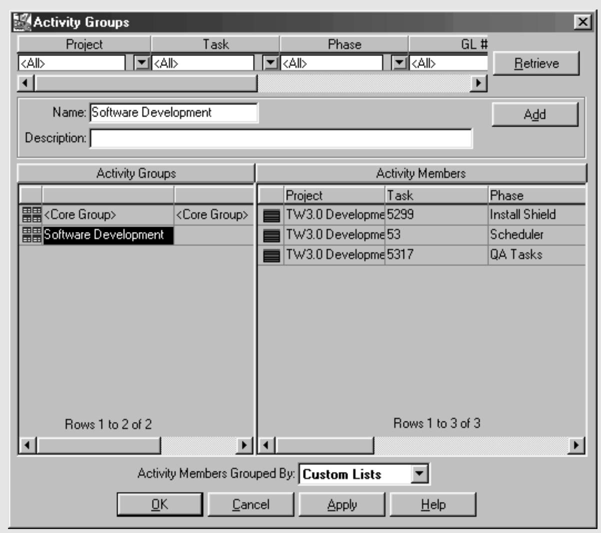


Figure 19.4

7. Click "Apply" to save the new settings and keep the dialog box open, or click "OK" to save the settings and return to the Detail Code Rules window.

NOTE

To remove an activity member from an activity group, highlight the activity group and move the appropriate activity from the membership frame on the right back onto the <Core Group> activity group on the left.

TIP

In the Activity Members frame, you can sort the display lists by clicking on the Activity field column headings.

In addition, you can simultaneously select multiple activity members by using the shift or control keys on your keyboard.

Example Figure 19.4 shows an example Activity Groups dialog box in which we have assigned three activity members to the activity group named "Software Development." In this example, we chose to group activity members by custom lists.

Objective 4: Edit an activity group

The Edit Activity Group dialog box enables you to rename and change the description for an existing activity group.

Editing an Activity Group

To edit an activity group, follow these steps:

1. In the Detail Code Rules window, click on the activity group to which you want to make corrections.
2. Click the Edit Activity Group icon to open the Activity Groups dialog box (or, Activity Group > Edit Group).
3. Click "Retrieve" to display available activities.
4. In the Activity Groups box, double-click on the activitiy group you want to edit to open the Edit Activity Group dialog box.
5. Edit the activity group information (i.e., name or description) as necessary.
6. Click "OK" to save the changes and return to the Activity Groups dialog box.
7. Click "Apply" to save the settings and remain in the dialog box, or click "OK" to save the settings and close the dialog box.

Objective 5: Delete an activity group

When you delete an activity group, its activity members return to the <Core Group> of activity members available for (re-)assignment to other activity groups, and its employee members return to the available employee members list.

Deleting an activity group

To delete an activity group, follow these steps:

1. In the Detail Code Rules window, click on the activity group that you want to delete.
2. Click the Delete Activity Group icon (Activity Groups > Delete Activity Group).
3. TimeWizard displays a confirmation window: "Delete current activity group?" Click "OK" to delete the activity group.

   Activities belonging to the deleted activity groups return to the <Core Group>. Consequently, employees belonging to the deleted activities return to the available employees list.

Figure 19.5

Objective 6: Define detail code profiles for an activity group

Now that you have created activity groups and assigned specific activities to them, you must create detail code profiles for each activity group and then assign employee members to those profiles. These detail code profiles will determine how employees charge time upon being assigned to an activity; the codes include such information as Cost Type, Pay Code and Billing Type. Information about the values used to create detail code profiles can be found in Chapter 4, Objective 3, "Assign available activity members to an activity group."

Defining detail code profiles for an activity group

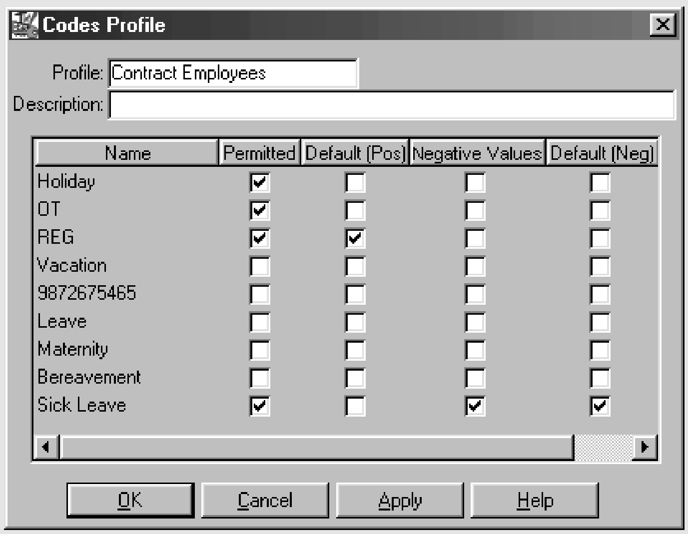


Figure 19.6

To define detail code profiles for an activity group, follow these steps:

1. In the Detail Code Rules window, click on the activity group for which you want to create detail code profiles.
2. Click the Add Profile icon to open the Codes Profile dialog box (Profile > Add Profile).
3. Type the profile name and description in the text boxes.
4. Select the appropriate permissions. You must specify one default setting for one permission for the entry of positive timesheet hours. If your company uses negative hours, see note below.
5. Click "Apply" to save the settings and remain in the dialog box, or click "OK" to save the settings and close the dialog box.

NOTE: If your company uses negative hours (e.g., for sick leave), you must select one default setting for the set of negative permitted code values, as well as one default setting for the positive permitted code values.

Objective 7: Assign employee members to detail code profiles

When you assign available employee members to detail code profiles, you allow them to charge the specified detail code values to assignments of activities in the activity group with which the profile is associated.

"Available" employees are those who are not assigned to a given detail code profile for an activity group. A single employee may only be assigned to one detail code profile per activity group; however, that employee may belong to other profiles for other activity groups. The general procedure is to first create all necessary activity groups, assign activities to them, associate detail code profiles with activity groups, and assign employees to those profiles.

When you select an activity group from the list at the top of the Detail Code Rules window, the <default> profile in the lower left will be highlighted, and you will see available employees in the Members list below and to the right. Click on and drag the appropriate employees on the right into the appropriate profile on the left.

NOTE To remove an employee member from an activity group profile, highlight the profile and move the appropriate employee from the Members frame on the right back to the <default> profile on the right.

TIP In the employee members frame, you can sort the display lists by clicking on the Members field column headings. In addition, you can simultaneously select multiple employees by using the shift or control keys on your keyboard.

NOTE Changing the method of grouping employee members for detail code profiles will remove all existing assignments of employeess to detail code profiles (see Section 6 Introduction, Objective 1, "Understand Employee and Activity Grouping Methods" for more information).

Assigning employee members to detail code profiles

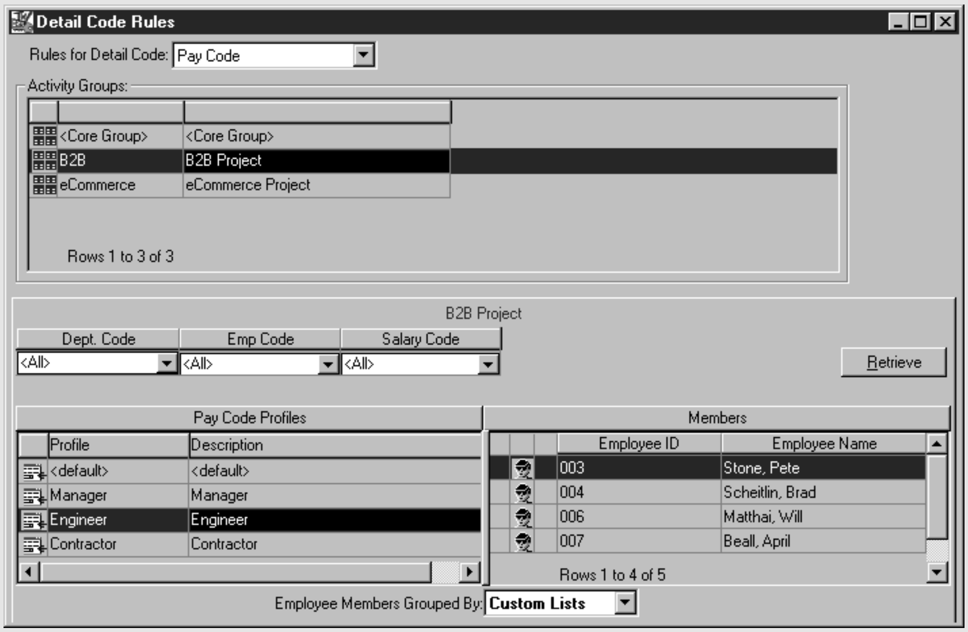


Figure 19.7

To assign employee members to detail code profiles, follow these steps:

1. Click on the Detail Codes icon to open the Detail Code Rules window.
2. Click on the Rules for Detail Code drop-down box and select the Detail Code field that contains the profile to which you want to assign members. Scroll through the drop-down list to make the selection.
3. Click on the activity group that contains the profile to which you want to assign members.
4. At the bottom of the window, specify an employee grouping method.
5. Specify your quickfilter parameters (see Section 6, Objective 3, "Use the Quickfilter").
6. Click "Retrieve" to display available employees. The available employees are members of the <default> profile.
7. Drag and drop each appropriate employee from the Members frame in the lower right to the appropriate profile in the lower left Profiles frame.

NOTE: To reverse the profile assignment, simply drag and drop the employee from the profile Members box back to the <default> profile.

Example In Figure 19.6, we defined a codes profile named “Contract Employees.” In Figure 19.7, we assigned employee members to that Contract Employees profile. In this example, the members of the Contract Employees profile are only permitted to charge time for holiday, overtime, regular time, and sick leave when they work on the activities in the Software Development activity group.

Objective 8: Edit a detail code profile

When you edit a detail code profile, you automatically change the settings for all of its members.

Editing a detail code profile

To edit a detail code profile, follow these steps:

1. Click on the Detail Codes icon to open the Detail Code Rules window.
2. Click on the Rules for Detail Code drop-down box and select the Detail Code field that contains the profile you want to edit. Scroll through the drop-down list to make the selection.
3. Click on the activity group that contains the profile you want to edit.
4. Specify your quickfilter parameters (see Section 6, Objective 3, “Use the Quickfilter”).
5. Click “Retrieve” to display the profiles.
6. Select the code profile you want to edit.
7. Click the Edit Profile icon to open the Codes Profile dialog box (Profile > Edit Profile).
8. Modify the profile information as desired.
9. Click “Apply” to save the settings and remain in the dialog box, or click “OK” to save the settings and close the dialog box.

Objective 9: Delete a detail code profile

When you delete a detail code profile, its members return to the <default> profile. You cannot delete the <default> profile, because its members do not belong to another group.

Deleting a detail code profile

To delete a detail code profile, follow these steps:

1. Click on the Detail Codes icon to open the Detail Code Rules window.
2. Click on the Rules for Detail Code drop-down box and select the Detail Code field that contains the profile you want to delete. Scroll through the drop-down list to make the selection.
3. Click on the activity group that contains the profile you want to delete.
4. Specify your quickfilter parameters (see Section 6, Objective 3, "Use the Quickfilter").
5. Click "Retrieve" to display the profiles.
6. Select the code profile you want to delete.
7. Click the Delete Profile icon (Profile > Delete Profile).

Figure 19.8

8. TimeWizard displays a confirmation window: "Delete the selected profile?" Click "OK" to delete the profile.

Summary

In this chapter, you have seen how to define activity groups and how to assign activities to them. You have also seen how to associate detail code profiles with activity groups and how to populate those profiles with employees. You have learned that the creation of detail code profiles allows you to restrict TimeWizard users to specific sets of Detail Code values for their timesheet transactions.

CHAPTER 20

Defining Timesheet Rules

Defining timesheet rules enables you to apply your organization's time accounting rules to the timesheet data that employees submit for approval. Timesheet rules allow you to enforce restrictions on the amounts of time submitted and the amounts of time associated with designated detail code values. Because timesheets that reach approvers are in compliance with the defined timesheet rules, the approval process is quicker and easier, and the data shared with other systems is more accurate.

When you define a timesheet rule, you first create the rule, and you then apply the rule to employees by assigning it to preference profile groupings. You can define multiple timesheet rules and determine when and how each will be applied. For each rule, you determine the affected days or date range, the affected activities or detail code values, and whether a timesheet owner who violates the rule is prevented from submitting the timesheet or merely receives a warning.

For example, you can make a timesheet rule that employees in one preference profile cannot submit more than 90 hours for a two-week period. For another preference profile, you can make a rule that hours cannot be submitted as overtime until 40 hours have been submitted as regular hours for a week. Another rule might apply to specific holiday dates, such as 12/25/01, and either require submitted hours to be logged to a holiday activity or prevent submission of project-related hours. If your employees are instructed to account on their timesheets for all weekly totals less than 40 (e.g., leave without pay), you can have TimeWizard enforce a rule that total hours must be greater than or equal to 40.

Objectives

1. Add a timesheet rule for an operator type and hours total
2. Define the range
3. Define the classification
4. Define the severity and compose error message text
5. Assign a timesheet rule to a preference profile
6. Edit a timesheet rule
7. Delete a timesheet rule

Objective 1: Add a timesheet rule for an operator type and hours total

You start the process of defining a timesheet rule by adding a name for the rule in the Define Timesheet Rules window, selecting an operator type, and entering the total number of hours on which the rule will be based. For example, if you want a rule that regular weekly hours must not exceed 40, then you can name a rule “Regular Hours,” select the operator “Must be less than or equal to (<=),” and enter the total hours “40.00” as in Figure 20.1.

You may select any of the following operator types:

- must be equal to (=)
- must not be equal to (<>)
- must be greater than (>)
- must be greater than or equal to (>=)
- must be less than (<)
- must be less than or equal to (<=)

Adding a timesheet rule, operator type, and hours total

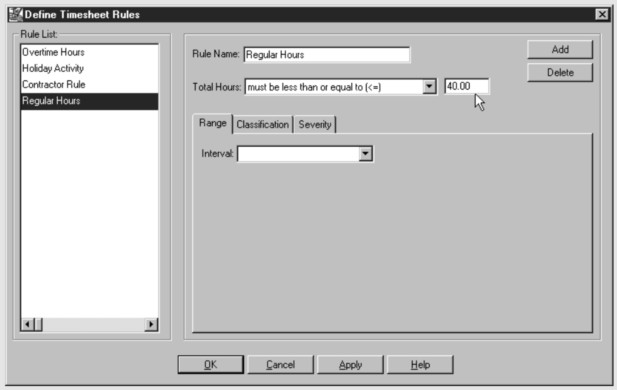


Figure 20.1

To add a timesheet rule, follow these steps:

1. Open the Define Timesheet Rules window through the Tools main menu (Tools > Business Rules > Define Timesheet Rules ...).
2. Click on the Add command button in the upper right to open the Add New Rule window.
3. Enter the desired Timesheet Rule name in the Rule Name text box. Click on the OK button to save the rule name and return to the Define Timesheet Rules window. The newly saved rule name will display in the Rule List in the left of the window and in the Rule Name text box in the upper center.
4. Click on the drop-down box below the Rule Name text box and select an operator for the rule.
5. Enter the total number of hours for the rule in the text box to the right of the operator drop-down box.
6. Follow the steps in Objective 2 to continue defining the rule.

Objective 2: Define the range

The range designates the interval of time in days or dates to which the timesheet rule will apply. Table 20.1 explains the interval types you can select. The selection of some interval types entails additional steps to define the range.

Table 20.1: Interval types

Interval	Explanation
Every day	The timesheet rule will apply to every day in every approval period, one day at a time.
Day of week list	The timesheet rule will apply to a day or days of the week, e.g., Monday and Wednesday, every week in every approval period.
Day of week range	The timesheet rule will apply to a range of days of the week, e.g, from Monday through Friday, every week in all approval periods. Days in a range are always consecutive.
Date list	The timesheet rule will apply to a specific date or specific dates that the user selects from a calendar in the Define Timesheet Rules window. Selected dates may be in one approval period or in many periods.
Date range	The timesheet rule will apply to a range of dates that the user selects from a calendar in the Define Timesheet Rules window, e.g., from 10/01/00 to 12/31/00.
Period rule	The timesheet rule will apply to all days within every approval period, one period at a time.

Defining the range *(continued on page 251)*

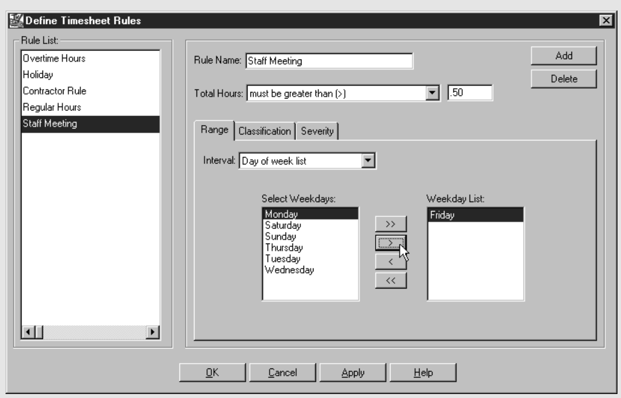


Figure 20.2

To define the range, follow these steps:

1. In the Define Timesheet Rules window, see that the Rule Name text box displays the desired rule.
2. In the Range tab page, click on the Interval drop-down box and select the interval type from the list.
3. If you selected “Every day” or “Period rule,” follow the steps in Objective 3 to continue defining the rule. If you selected another interval type, continue with the steps of Objective 2.

Defining the range *(continued from page 250)*

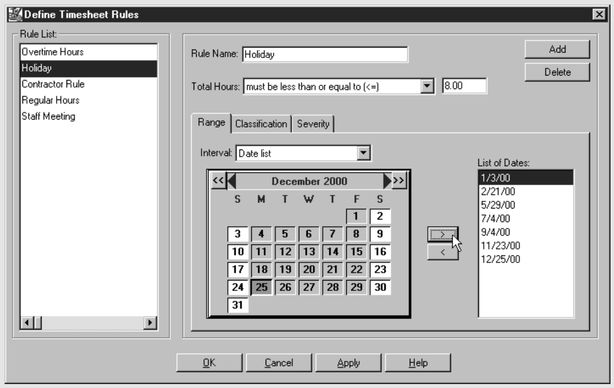


Figure 20.3

4. If you selected "Day of week list," boxes labeled "Select Weekdays" and "Weekday List" display on the Range tab page (Figure 20.2). Highlight the desired day in the Select Weekdays box and click on the right-arrow (>) command button to move your selection to the Weekday List box or double-click on the day to display it in the list. Repeat until all desired days display in the Weekday List box. Click on the left-arrow (<) button to move a highlighted day from the Weekday List box to the Select Weekdays box.

5. If you selected "Day of week range," boxes labeled "From" and "To" display on the Range tab page. Click on the "From" drop-down box and select the first day of the range from the list. Click on the "To" drop-down box and select the last day of the range from the list.

6. If you selected "Date list," a calendar and a box labeled "List of Dates" display on the Range tab page (Figure 20.3). In the calendar, click on the double arrows to select another year and click on the single arrows to select another month. Click on the desired date and then click on the right-arrow (>) command button to display your selection in the List of Dates box or double-click the date to display it in the list. Repeat until all desired dates display in the List of Dates box. Click on the left-arrow (<) button to delete a highlighted date from the list.

7. If you selected "Date range," a calendar and boxes labeled "From Date" and "To Date" display on the Range tab page. In the calendar, click on the double arrows to select another year and click on the single arrows to select another month. Click on the desired date to begin the range, and click on the upper right-arrow (>) command button next to the "From Date" box. Click on the desired date to end the range, and click on the lower right-arrow button next to the "To Date" box.

8. Follow the steps in Objective 3 to continue defining the rule.

Objective 3: Define the classification

The classification designates the activities or detail code values to which the timesheet rule will apply. Table 20.2 explains the classifications you can select. The selection of some classifications entails additional steps to define the activities or detail code values on which the timesheet rule will be based.

Table 20.2: Classifications

Classification	Explanation
All hours	The timesheet rule will apply to all hours, regardless of activity or detail code value.
All project-related activities	The timesheet rule will apply to all activities defined as project-related in the Activity Detail window. The rule will not apply to activities defined as overhead leave or overhead other.
By ***(activity field value)***	The timesheet rule will apply to the specific activity field values, i.e., activity keys values, that the user selects.
By ***(detail code value)***	The timesheet rule will apply to the specific detail code values that the user selects.
By ***(detail code value)*** with condition	The timesheet rule will apply to specific detail code values, and hours must be applied to particular detail code values designated by the user before being applied to other detail code values. For example, the rule's hours total must be applied to the detail code value "Regular Time" before any hours can be applied to the detail code value "Overtime."

Defining the classification *(continued on page 254)*

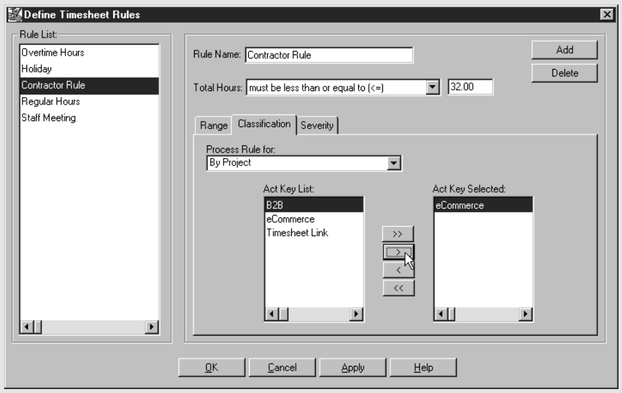


Figure 20.4

To define the classification, follow these steps:

1. In the Define Timesheet Rules window, see that the Rule Name text box displays the desired rule.
2. In the Classification tab page, click on the "Process Rule for" drop-down box and select the classification from the list.
3. If you selected "All hours" or "All project-related activities," follow the steps in Objective 4 to continue defining the rule. If you selected another classification, continue with the steps of Objective 3.
4. If you selected an activity field name, boxes labeled "Act Key List" and "Act Key Selected" will display (Figure 20.4). Highlight an activity item in the Act Key List box and click on the right-arrow (>) command button to move your selection to the Act Key Selected box. Repeat until all desired items display in the Act Key Selected box. You can click the double right-arrow (>>) button to select and move all the items. Click on the left-arrow (<) button to delete a highlighted item from the Act Key Selected box or click on the double left-arrow (<<) button to delete all the items.

Defining the classification *(continued from page 253)*

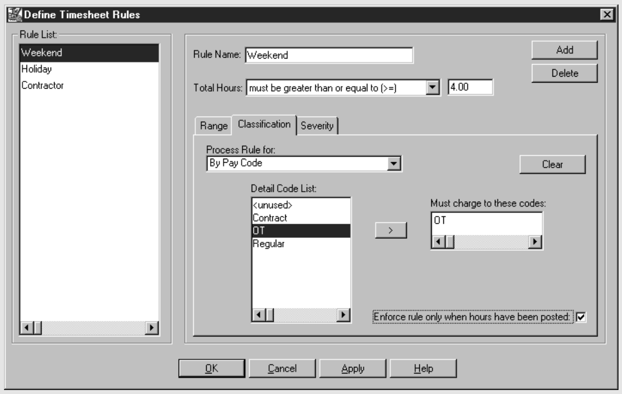


Figure 20.5

5. If you selected a detail code field name, boxes labeled "Detail Code List" and "Must charge to these codes" will display. Highlight a detail code value in the Detail Code List box and click on the right-arrow (>) command button to move your selection to the Must charge to these codes box. Repeat until all desired code values display in the Must charge to these codes box. Use the horizontal scroll bars as needed. To delete the values from the Must charge to these codes box, click on the Clear button in the upper right of the tab page.
6. If you selected a detail code field name, but you did not select a detail code with condition, you can select "Enforce rule only when hours have been logged" to prevent the rule from being applied when no hours have been entered in the defined range (see Figure 20.5 above and the example below).
7. If you selected a detail code field name with condition, boxes labeled "Detail Code List," "Must charge to these codes," and "Before these codes" will display. Highlight a detail code value in the Detail Code List box and click on the upper right-arrow (>) command button to move your selection to the Must charge to these codes box. Repeat until all desired code values display in the Must charge to these codes box. To move a code value to the Before these codes box, highlight the value in the Detail Code List box and click on the lower right-arrow button. Repeat until all desired code values display in the Before these codes box. Use the horizontal scroll bars as needed. To delete the values from the Must charge to these codes or Before these codes boxes, click on the Clear button in the upper right of the tab page.
8. Follow the steps in Objective 4 to continue defining the rule.

Example

Suppose you define a rule that employees must log at least four hours when they apply a detail code for overtime to weekend hours. Select the "Enforce rule only when hours have been logged" checkbox to prevent the timesheet rule from invalidating timesheets that have no hours logged for the weekend.

Objective 4: Define the severity and compose error message text

The severity level of the timesheet rule determines whether a timesheet that violates the rule can be submitted for approval. If you want to require timesheets that violate the rule to be corrected before submittal, choose the "Error" level. If you want the timesheet owner to receive a warning but have the option of submitting an uncorrected timesheet, choose the "Warning" level instead.

Regardless of the severity level you select, when the timesheet owner attempts to submit a timesheet that violates a rule, your custom error message displays with the dates of the timesheet columns that contain the violations. If the timesheet owner does not have the permission to submit timesheets, the department owner who performs the submittal will receive the message. You are required to enter a message before you can complete the definition of a timesheet rule.

A property setting enables you to use a different error message specifically for violations of timesheet rules for leave balances. By applying this property setting, the alternative message displays when an employee exceeds a leave balance and attempts to submit the timesheet. If the employee violates a timesheet rule other than a leave balance rule, the message entered in the Define Timesheet Rules window displays.

The alternative message text is "Leave Balance Exceeded." You may edit this text to create a custom message for leave balance violations. See the *TimeWizard Installation Guide* to learn to change the property setting and to create an alternative message.

Defining severity and composing error message text

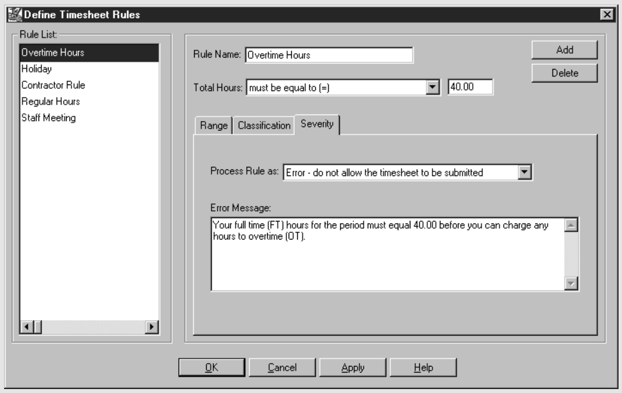


Figure 20.6

To define severity, follow these steps:

1. In the Define Timesheet Rules window, see that the Rule Name text box displays the desired rule.
2. In the Severity tab page, click on the "Process Rule as" drop-down box and select the severity from the list. If a timesheet violates a rule processed as "Error," the timesheet cannot be submitted until corrected.
3. In the Error Message text box, enter the message text you want displayed for all timesheet rule violations, or, if you use the alternative property setting, for all violations except excessive leave balances.
4. Click the Apply command button at the bottom of the window to save all aspects of your timesheet rule and remain in the window. Click the OK button to save all aspects of your timesheet rule and exit the window.

Objective 5: Assign a timesheet rule to a preference profile

Before a timesheet rule can be applied to a timesheet, the rule must be assigned to the employee. TimeWizard enables you to assign timesheet rules to selected groups of employees by assigning the rules to preference profiles in the Preferences area of TimeWizard Administrator.

Assigning a timesheet rule

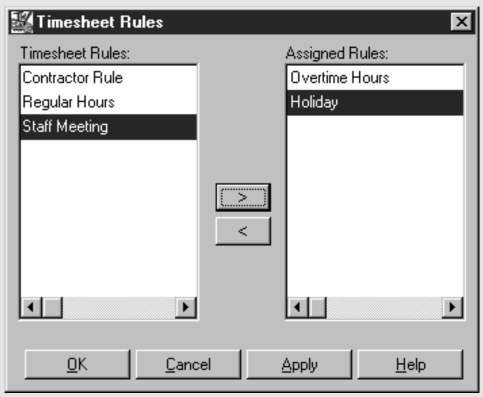


Figure 20.7

To assign a timesheet rule, follow these steps:

1. In the Preferences area, open the desired Preference Profile detail window (see Chapter 16).
2. Click on the "Assign Rules ... " command button in the lower right to open the Timesheet Rules window (Figure 20.7).
3. In the Timesheet Rules text box in the left side of the window, highlight the name of the rule you want to assign. Click on the right-arrow (>) command button to move the selected rule to the Assigned Rules text box on the right side of the window.

   NOTE: The rule will apply to all members of the preference profile.
4. Repeat step 3 until all the rules you want to assign to the profile display in the Assigned Rules text box.
5. To delete a rule from the Assigned Rules box, highlight the rule and click on the left-arrow (<) button.
6. Click on the Apply command button at the bottom of the window to save your assignments and remain in the window. Click on the OK button to save your assignments and return to the Preference Profile window.

Objective 6: Edit a timesheet rule

Editing a timesheet rule

To edit a timesheet rule, follow these steps:

1. In the Define Timesheet Rules window, highlight the name of the desired rule in the Rule List box on the left side of the window to display the name in the Rule Name text box in the upper center (Figure 20.1).
2. To edit a rule name, make the edit in the Rule Name box rather than the Rule List box.
3. Change the entries in the desired input text boxes or drop-down boxes.

   NOTE: To make an edit on a Classification tab page that displays a Clear command button in the upper right, first click on the Clear button.
4. Click on the Apply command button to save your edits and remain in the window or click on the OK button to save your edits and exit.

Objective 7: Delete a timesheet rule

Deleting a timesheet rule

To delete a timesheet rule, follow these steps:

1. In the Define Timesheet Rules window, highlight the name of the desired rule in the Rule List box on the left side of the window to display the name in the Rule Name text box in the upper center (Figure 20.1).
2. Click on the Delete command button in the upper right of the window.
3. A prompt box, which includes the rule name, opens to ask if you want to delete that rule. Click on the OK button in the box to confirm the deletion or click on the Cancel button to stop the deletion.
4. If you deleted the rule, it is deleted from both the Define Timesheet Rules window and the Preference Profile Timesheet Rules window.
5. Click on the "X" control on the right side of the window title bar or click on the Cancel button at the bottom of the window to exit the window.

Summary

You have learned to create timesheet rules so that timesheet data is more accurate. You have also learned to assign different timesheet rules to different groups of employees.

CHAPTER 21

Standard Text Editor

TimeWizard's communication system consists of several types of notes that can be attached to a variety of transactions. Some notes—such as a timesheet transaction note or a timesheet summary—are composed voluntarily by the timesheet owner. Other notes—such as an employee edit note or an approval statement—are required for auditing purposes.

Rather than requiring all TimeWizard users to write their own notes (which may not communicate effectively), you can use the Standard Text Editor to compose standard notes that users can select for multiple timesheet functions. Users then will have the option of choosing a standard note or composing an original note.

For convenience, one default standard text note comes predefined for each standard text category. You can edit these notes to reflect the wording you desire and add additional notes for each standard text category.

Objectives

1. Navigate the Standard Text Editor Area
2. Compose Standard Notes
3. Edit Standard Notes
4. Deleting Standard Notes

Objective 1: Navigate the Standard Text Editor area

From the Standard Text Editor area, you can compose standard notes that users can select for multiple timesheet functions.

Navigating the Standard Text Editor area

To open the Standard Text Editor area, follow either of these steps:

1. Click on the Standard Text Editor icon. 
2. Select Tools > Business Rules > Standard Text Editor from the TimeWizard main menu.

Figure 21.1

Table 21.1: Standard Text Categories

Standard Text Category	Explanation
Approval Override	This category enables you to compose a standard note that users with approval authority can use to explain an approval that overrode a lower-level approval. This lower level may have been the employee's submit of his or her own timesheet or a lower-level department owner's approval.
Approval Statement	This category enables you to compose a standard note that users with approval authority can use to explain an approval.
Closed Period Override	This category enables you to compose a standard note that users with administrator-level permissions can use to explain the action of closing an approval period even when approvals are missing.
Corrections	This category enables you to compose a standard note that users with permission for Historical Corrections can use to explain changes to original timesheet data.
Employee Edit	This category enables you to compose a standard note that users with department ownership can use to explain their entry into another employee's timesheet.
Rejections	This category enables you to compose a standard note that users with approval authority can use to explain a timesheet rejection.
Timesheet Summary	This category enables you to compose a standard note that timesheet owners can use to explain the entire timesheet for a single approval period.
Transaction Notes	This category enables you to compose a standard note that timesheet owners can use to explain detailed timesheet transactions.

Objective 2: Compose standard notes

The standard text categories cover all functions of the timesheet for which users may desire or be required to leave notes. You can compose and save multiple notes for each standard text category—except for the Approval Statement category, which allows for only one note. Table 21.1 explains each standard note category.

Composing standard notes

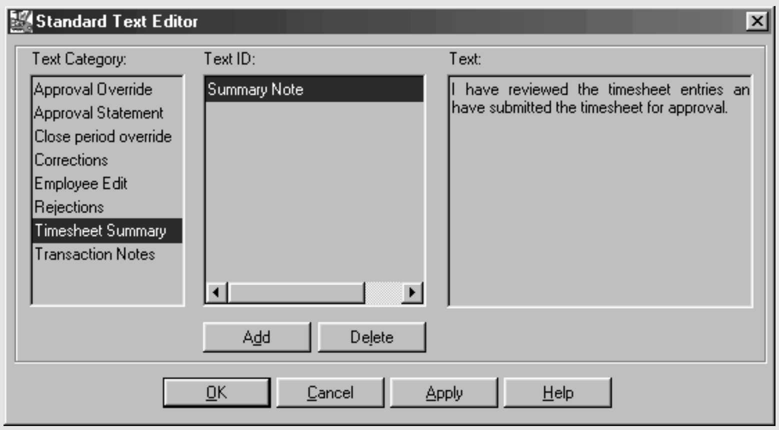


Figure 21.2

To compose standard notes, follow these steps:

1. Select Standard Text Editor from the Tools menu (Tools > Business Rules > Standard Text Editor) to open the Standard Text Editor window.
2. Select the Standard Text Category for which you want to compose a standard note.
3. Click "Add" to add an empty text box in the Text ID box.
4. Enter the name of the standard note in the text box.
5. Click in the Text box (at right) and compose the standard text for the selected note.
6. Click "Apply" to make the settings but remain in the dialog box, or click "OK" to save the settings and close the dialog box.

Example In the example Standard Text Window shown in Figure 21.2, we added a new note entitled "Summary Note" to the Timesheet Summary Standard Text Category. We then composed the text for the new note in the Text box. Now that this note exists in the TimeWizard system, timesheet users can select this note as their timesheet summary, rather than having to type a new note (which may not communicate as effectively).

Objective 3: Edit Standard Notes

TimeWizard enables you to edit the text in an existing standard note at any time. Once you apply the change, TimeWizard users making new selections will see the new text when they place that standard note. Notes already saved to the database remain unchanged.

Editing Standard Notes

To edit standard notes, follow these steps:

1. Select Standard Text Editor from the Tools menu (Tools > Business Rules > Standard Text Editor) to open the Standard Text Editor window.
2. Select the Standard Text Category that contains the note you want to edit.
3. In the Text ID box, select the note that you want to edit.
4. In the Text box, make any necessary changes to the text.
5. Click "Apply" to save the settings but remain in the dialog box, or click "OK" to save the settings and close the dialog box.

Objective 4: Delete standard notes

TimeWizard enables you to delete unused standard notes. When you delete a standard note, it will no longer be available to TimeWizard users.

Deleting standard notes

To delete standard notes, follow these steps:

1. Select Standard Text Editor from the Tools menu (Tools > Business Rules > Standard Text Editor) to open the Standard Text Editor window.
2. Select the Standard Text Category that contains the note you want to delete.
3. In the Text ID box, select the note that you want to delete.
4. Click "Delete."
5. Click "Apply" to save the settings but remain in the dialog box, or click "OK" to save the settings and close the dialog box.

Summary

In this chapter, you have learned to compose standard notes in the system so that communication between TimeWizard users remains convenient and consistent.

CHAPTER 22

Setting Up Clock-In/Clock-Out Use

Clock-In/Clock-Out (CIO) timesheets record start and stop times of an employee's work for each assignment during the day. A time cell displays the time of day instead of the amount of hours worked. The Daily Total and Period Total cells display amounts of hours in the usual way.

Clock-In/Clock-Out users

You can designate some or all TimeWizard.*enterprise* users as CIO users. CIO users automatically receive the Clock-In/Clock-Out timesheet when they open their timesheets.

Time formats

CIO timesheets can display time in AM/PM format or in 24-hour format. "01:00PM" is an example of AM/PM format; the same time would display as "13:00" in 24-hour format. The selected time format applies globally to all CIO users in your TimeWizard database. To change the property setting to 24-hour format from the default AM/Pm format, refer to the *TimeWizard Installation Guide*.

Leave and break activities

Leave activities, such as Vacation Leave or Sick Leave, can be set for entry of an amount of hours, rather than start and stop times, by defining their activity type as OH-Leave in the Activity Detail window. Activities such as Lunch or Break Time can be set so that they do not add time to daily and period totals by defining their activity type as OH-Break. See Chapter 12, "Working with Activities," for information on creating activities.

NOTE When a CIO timesheet is submitted for approval, TimeWizard does not check the timesheet data for adherence to the Timesheet Rules set in the Define Timesheet Rules window and assigned to preference profiles. Restrictions can be enforced through the balance settings for OH-Leave assignments and through the approval process. DataBridge scripts can prevent the export of certain kinds of invalid data.

To learn to use the CIO timesheet, see Chapter 5, "Clocking In and Out," in the *TimeWizard.enterprise User's Guide*.

Objectives

1. Set up Clock-In/Clock-Out timesheets
2. Set Detail Codes for different types of users

Objective 1: Set up Clock-In/Clock-Out timesheets

Employees who are designated as CIO users can clock in and out of the same assignment many times during a day by adding multiple detail code rows to the assignment.

Once you have completed the setup for CIO timesheets, the first detail field of each assignment will automatically display a sequence number (positive integers such as 1, 2, or 3). Any other detail code fields will display your default detail code values and will be read-only fields.

Setting up Clock-In/Clock-Out timesheets

Figure 27.1

To set up Clock-In/Clock-Out timesheets, follow these steps:

1. To set the first detail code field for CIO sequence numbers, consult the *TimeWizard Installation Guide* and set the appropriate property setting to "Y."
2. To assign the CIO timesheet to an employee, select CIO User in the Employee Detail window for the employee (Employees > Employee Detail). (Figure 22.1).
3. In the Custom Fields area, define the first Detail Code field for the CIO sequence number (Tools > Custom Fields > Detail Codes). Enter a Caption and the maximum length (number of digits) of the sequence number, and click "OK."
4. In the Code Values area, assign positive integers in sequence to the first Detail Code field (Tools > Code Values > Detail Codes), from "1" to the maximum times an employee can use an assignment in one day.

   For each number, click "Add" and enter the number in the blank Name box. After entering all the numbers, click "OK."
5. To complete the setup, continue with the steps on the next page to make and assign Detail Code Rules for CIO users.

Completing the Clock-In/Clock-Out setup

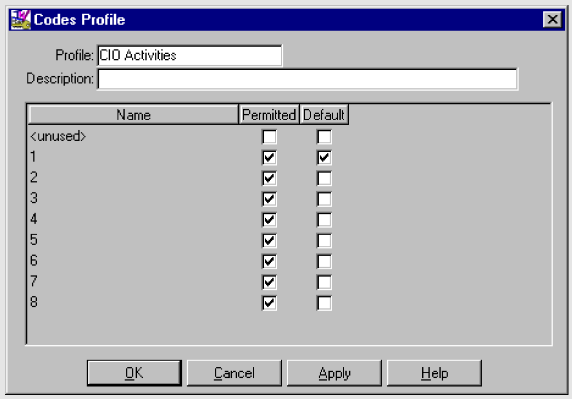


Figure 22.2

To complete the Clock-In/Clock-Out setup, follow these steps:

1. In the Detail Codes area (Tools > Business Rules > Detail Codes), define new activity groups, if needed, in the Activity Groups dialog box, and save the new settings.
2. Assign activities to activity groups, as needed, and save the new settings. Do not change the Activity Members Grouped By selection unless you want to remove all exisitng activity assignments.
3. In the Codes Profile dialog box (Figure 22.2), define a detail code profile for each activity group that CIO users may access. Select the Permitted box of each sequence number. Do not permit any other code values for the first detail code field.
4. Select the code value "1" as the positive default.
5. If CIO users may use detail code fields other than the first field, select the permitted code values for those fields. If any associated transactions will be negative, select the corresponding Negative Values box(es) and one negative default.
6. Save the Codes Profile settings.
7. Assign CIO users to the appropriate detail code profiles, defined in step 3 above. Do not change the Employee Members Grouped By selection unless you want to remove all existing employee assignments. Close the Detail Code Rules window.

Objective 2: Set Detail Codes for different types of users

You can have the first detail code field show different sets of codes to different types of users. Non-CIO users need not see the sequence numbers described in Objective 1.

Setting Detail Codes for different types of users

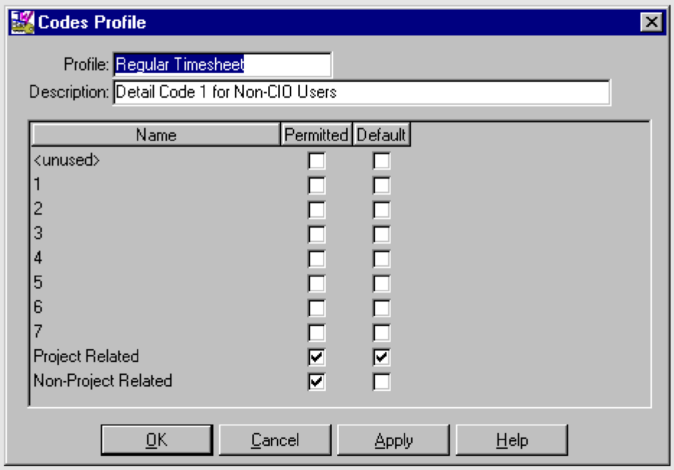


Figure 22.3

To set detail codes for different types of users, follow these steps:

1. In the Code Values area, assign code values for non-CIO users to the first detail code field (Tools > Code Values > Detail Codes). For each code, click "Add" and enter the code in the blank Name box. After entering all the codes, click "OK."

   Retain the sequence numbers assigned in Objective 1 (Figure 22.3).

2. In the Codes Profile dialog box of the Detail Codes area (Tools > Business Rules > Detail Codes > Codes Profile), define a detail code profile for each activity group that a specific non-CIO user group may access (Figure 22.2). Select the Permitted box of each code you added in step 1. Do not permit codes for the first detail code field that are inappropriate for these users.

4. Select one code as the positive default or, if the associated transactions will be negative, select the corresponding Negative Values boxes and one negative default. Save the Codes Profile settings.

5. Assign users to the appropriate detail code profiles, defined in step 2 above. Do not change the Employee Members Grouped By selection unless you want to remove all existing employee assignments. Close the Detail Code Rules window.

CHAPTER 23

Setting Up Accrual Hours

Many employees accrue leave hours, such as vacation or sick leave, each payroll period. TimeWizard can automatically generate the leave accrual for selected activities and employees. You can schedule leave balances to be updated at the end of each approval period or on a selected day prior to the end of the period.

Objectives

1. Set up accrual activities
2. Define an accrual profile
3. Assign employees to an accrual profile
4. Schedule balance updates
5. Edit an accrual profile
6. Delete an accrual profile

Objective 1: Set up accrual activities

You can select any activities that are designated as activity type "OH-Leave" to accrue leave hours. If you add multiple leave activities to the TimeWizard database, you can set up different activities to accrue different amounts of hours each approval period. For example, you can set Vacation Leave to accrue 3.08 hours each period and Sick Leave to accrue 1.54 hours each period.

Setting up specific activities for different types of leave also enables you to assign different employees to different accrual profiles. For example, you can choose to assign all employees to a profile for Sick Leave and only some employees to a profile for Personal Leave.

NOTE: An accrual profile is set up for an activity rather than a specific employee assignment. When timesheet balances are updated, the accrual amount is applied to all employee assignments based on the accrual activity.

Setting up accrual activities

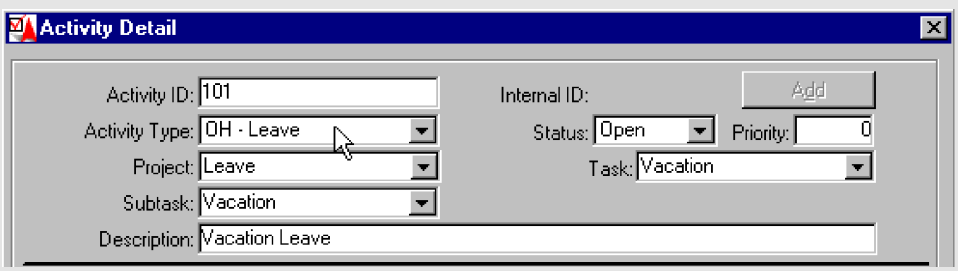


Figure 23.1

To set up accrual activities, follow these steps:

1. In the Activities and Assignments area, select Activity > Add Activity from the menu or click the Add Activity icon to add a new activity.
2. In the Activities Detail window (Figure 23.1), click the Activity Type drop-down box and select "OH-Leave" from the list.
3. Follow the instructions in Chapter 12, Objective 3, "Add a new activity" to complete the setup for the activity.

Remember that each activity must have a unique combination of key activity values in the top section of the window.

Objective 2: Define an accrual profile

When you define an accrual profile, you specify the amount of hours to accrue to one selected leave activity in one period. You define a separate accrual profile for each activity that you want to use for accruals. Employee assignments based on an accrual activity only accrue hours if the employee is assigned to the accrual profile for that activity.

You can define multiple profiles for one activity if different employees accrue different amounts of hours for the activity. For example, you can define one vacation profile for entry-level employees and a second vacation profile for employees with more seniority who accrue more vacation hours each period. You must give each profile a unique name.

Defining an accrual profile

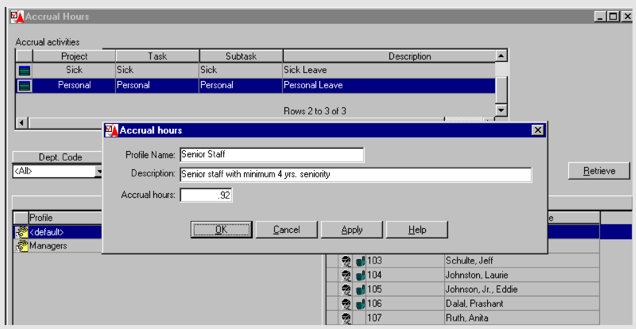


Figure 23.2

To define an accrual profile, follow these steps:

1. Click the Accrual hours icon on the toolbar or select Tools > Business Rules > Accruals from the menu to open the Accrual Hours window.
2. Select the activity for the profile in the Activity Groups list in the top frame. Scroll down in the list as needed.
3. Click the Add Profile icon or select Profile > Add Profile from the menu to open the Accrual hours dialog box for the selected activity (Figure 23.2).
4. Type a unique profile name and optional description in the text boxes. Enter the amount of accrual hours in the bottom box.
5. Click “OK” to save the profile and close the Accrual hours dialog box.
6. To define more accrual profiles, repeat steps 2 – 5 above.

Objective 3: Assign employee members to an accrual profile

You can assign an employee to many accrual profiles, provided that each of the employee's profiles is defined for a different accrual activity.

All employees are initially assigned to the <default> profile for each accrual activity. You may edit the accrual hours amount in the <default> profile or keep its initial setting of zero hours. When you assign an employee to a profile, you remove the employee from the <default> profile for that activity. However, the employee remains in the <default> profiles for other activities until you make assignments for those activities.

NOTE

Changing the method of grouping employee members for accrual profiles will remove all existing assignments to accrual profiles. See the Section Six Introduction, Objective 1, "Understand Employee and Activity Grouping Methods" for more information on grouping methods.

Assigning employee members to an accrual profile

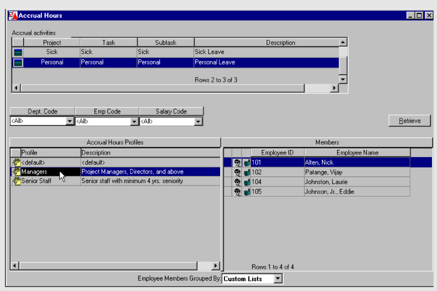


Figure 23.3

To assign employees to an accrual profile, follow these steps:

1. In the Accrual Hours window, click the Retrieve button on the right to display the Accrual Hours Profiles in the lower left frame.
2. To change the employee grouping method for all accrual profiles, select a grouping method in the Employee Members Grouped By drop-down box at the bottom of the window. Changing the grouping method removes all existing assignments to accrual profiles.
3. Select members in the lower right frame. Drag and drop the selected members to the appropriate profile in the lower left.
4. To view assignments to a profile, select the profile in the lower left. The members of the selected profile display in the lower right.
5. To change an assignment, drag and drop a member from the Members frame to the <default> profile. Select the <default> profile and repeat step 3 if needed.

Objective 4: Schedule balance updates

You can schedule TimeWizard to update the leave balances at specified times. You accomplish this by setting up a Custom Application interface in the Interface Controller, setting an Interval Type, and starting the Scheduler.

Setting up a Custom Application for accruals

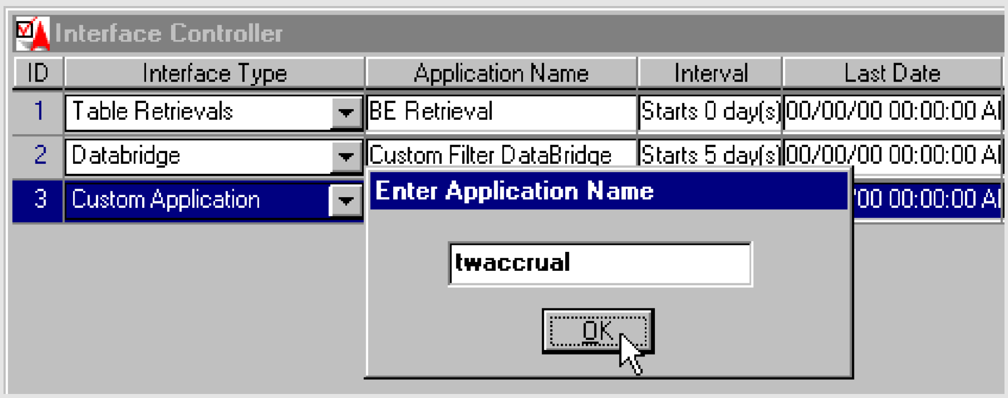


Figure 23.4

To set up a Custom Application for accruals, follow these steps:

1. Click the Interface Controller toolbar icon or select Tools > Interface Controller from the main menu to open the Interface Controller window.
2. Click the Add Interface icon or select Interface > Add Interface from the menu to add a new interface row.
3. In the new row, select Custom Application from the Interface Type drop-down menu.
4. Click the Setup icon or double-click the blank application name box to open the Enter Application Name dialog box.
5. Enter the following name for the application: twaccrual
6. Click "OK" to save the name and close the dialog box. Continue with the steps on the next page.

To learn more about working with the Interface Controller, see "Introduction to the TimeWizard Interface Controller" in Section Seven, particularly Objective 3, "Navigate the Interface Controller window" and Objective 7, "Review the Interface Status."

Scheduling balance updates

To schedule a balance update, follow these steps:

1. In the Interface Controller window, select the twaccrual application. Select Interface > Interval from the menu or click the Interval icon on the toolbar to open the Change Interval dialog box (Figure 23.5).

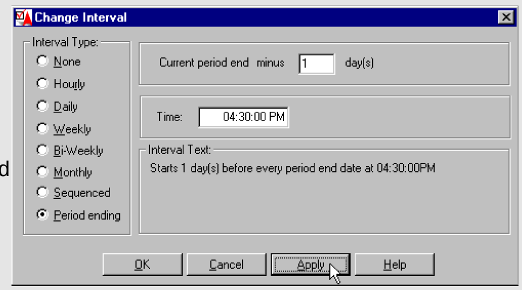


Figure 23.5

3. Select an interval type such as Period ending. If you select Period ending, the default value of zero in the "Current period end minus __ day(s)" box schedules the update for the last day of each period.

4. To schedule the update for a specified number of days before the end of the period, select Period ending as the interval type, and edit the number in the "Current period end minus __ day(s)" box as needed.

5. In the Time box, specify the time of day to update the balances. Enter the time in the format HH:MM:SS AM or HH:MM:SS PM.

6. Click "Apply" to view a confirmation of your settings. Click "OK" to save the settings and close the dialog box.

7. Select Interface > Start Scheduler from the menu or click the Start Scheduler icon on the toolbar.

8. To stop a scheduled update, select the application row in the Interface Controller window. Select Interface > Stop Scheduler from the menu or click the Stop Scheduler icon.

Objective 5: Edit an accrual profile

When you edit an accrual profile, your change applies to all members of the profile.

Editing an accrual profile

To edit an accrual profile, follow these steps:

1. Click the Accrual hours icon on the toolbar or select Tools > Business Rules > Accruals from the menu to open the Accrual Hours window.
2. Click the Retrieve button on the right side of the window to display the profiles in the lower left.
3. Select the accrual profile you want to edit. Click the Edit Profile toolbar icon or select Profile > Edit Profile from the menu to open the Accrual hours dialog box for the profile.
4. Edit the profile definition as needed.
5. Click "OK" to save your changes and close the dialog box.
6. To modify member assignments to the profile, see the steps of Objective 3, "Assign employee members to an accrual profile."
7. To change the accrual activity for the profile, delete the profile and define a new profile. See Objective 6, "Delete an accrual profile."

Objective 6: Delete an accrual profile

When you delete an accrual profile, its members return to the <default> profile. You cannot delete the <default> profile.

Deleting an accrual profile

To delete an accrual profile, follow these steps:

1. Click the Accrual hours icon on the toolbar or select Tools > Business Rules > Accruals from the menu to open the Accrual Hours window.
2. Click the Retrieve button on the right side of the window to display the profiles in the lower left.
3. Select the accrual profile you want to delete. Click the Delete Profile toolbar icon or select Profile > Delete Profile from the menu.
4. A dialog box displays to confirm that you want to delete the selected profile. Click "Yes" to delete the profile or "No" to retain the profile.

CHAPTER 24

Setting Up the Expense System

The expense system enables you to track employee expenses in relation to TimeWizard assignments. It also provides employees with an easy system for recording and submitting detailed expense sheets, whether or not the employees use timesheets. Department owners can approve expense sheets in the Expense Approval area, which uses the same approval hierarchy as department approvals.

You customize the expense system for your business. Expense types, payment types, and expense sheet names are all user-defined. Users can produce expense sheets for specific projects, date ranges, or any other categorization of expenses.

The expense system accommodates all internationally recognized currency types and can be configured to perform exchange rate calculations.

You can export expense data to external corporate systems through TimeWizard's DataBridge. See Chapter 27, "Working with the DataBridge Toolkit," for information on the DataBridge feature.

Objectives

1. Set expense permissions
2. Set up optional expense activities
3. Set default currency and exchange rates
4. Set up currency profiles
5. Define expense types
6. Define payment types

Objective 1: Set expense permissions

Three permission settings govern access to the expense system. Table 24.1 explains each expense permission.

Table 24.1: Expense Permissions

Permission	Explanation
Expense System	This permission allows a user to create expense sheets, add assignments and expense items to them, and edit the expense sheets. When the user submits the expense sheet for approval, the sheet becomes read-only.
Expense System Setup	This permission allows a user to set up expense types and payment types to be used in expense sheets.
Currency	This permission allows a user to define currency profiles so that different employees can have different default currency types. The permission also allows the user to assign employees to profiles and to modify profiles.

Setting expense permissions

To set expense permissions, follow these steps:

1. Open the Permissions window (Tools > Business Rules > Permissions) and click "Retrieve."
2. To modify an existing permissions profile for all of its employee members, select the profile and open the Permissions Profile dialog box (Profile > Edit Profile).
3. From Advanced Permissions, select "Expense System" as needed. From Administrator Permissions, select "Expense System Setup" and "Currency" as needed.
4. Click "OK" to save the settings and close the dialog box. Repeat steps 2 - 4 to modify other permissions profiles.
5. To apply your changes, close the Permissions window.
6. To add a new permissions profile or change employee profile assignments, see Chapter 15, "Setting Permissions."

Objective 2: Set up optional expense activities

An expense sheet user can add any assignment—even a closed assignment—to an expense sheet, provided that the user is not restricted from adding the assignment by other business rule settings. The assignment does not need to be on the user's timesheet to be added to an expense sheet.

Expense activities

Assignments based on expense activities can only be added to expense sheets; they cannot be added to timesheets. An expense sheet may contain timesheet assignments, expense assignments, or both. Expense activities are particularly useful for employees who do not use timesheets, but need to submit expense sheets. For example, salaried or exempt employees may not be required to submit timesheets but may have travel expenses to record.

To use an expense sheet, an employee must be entered in TimeWizard (Administrator > Employees) and must be assigned the "Expense System" permission (see Objective 1, "Set expense permissions").

Setting up expense activities

To set up expense activities, follow these steps:

1. Open the Activities and Assignments window (Tools > Activities and Assignments).
2. Open the Activity Detail dialog box (Activity > Add Activity).
3. Click the Activity Type drop-down box and select "OH-Expense" from the list.
4. Enter the appropriate information requested for each section of the dialog box, as needed.
5. Click "Apply" to save the settings and remain in the Activity Detail dialog box, or click "OK" to save the settings and close the dialog box. After clicking "Apply," you can click "Add" to add another activity.
6. In the Activities and Assignments window, make one or more resource assignments based on each new activity. The resource assignments may use the resource code "<unclassified>."

For more information on adding and editing activities and resource assignments, see Chapter 12, "Working with Activities," and Chapter 13, "Working with Resource Assignments."

Objective 3: Set default currency and exchange rates

Currencies

Initially, the US Dollar is designated as the **default company currency type** in TimeWizard. You may change which currency type is set as your company default. When you define an expense type for use in the expense system, you may use your company default or select another currency type for the expense type.

The box on the next page describes one method of setting the default currency type that will display in the Expense Type setup window. You may choose to change this company default currency by running a database script instead. An example of such a script is included later in this objective.

An expense sheet user may have a different default currency than the company default currency. You have the option of setting up currency profiles to assign different **user default currencies** to different employees or groups of employees. Whether or not an expense sheet user's default currency is the same as the company's, the user may select another currency for an expense item entry.

If a user selects a currency other than the user's default for an expense entry, and if TimeWizard has been set up to perform exchange rate calculations, then the expense sheet will automatically display the amount of the entered expense in both currencies.

NOTE If a user enters expense items with different currencies on the same expense sheet, the sheet will display totals grouped by currency type, rather than displaying one grand total.

NOTE Setting the company default currency in the database does not automatically set the currency type in the <default> currency profile in the Currency window (Administrator > Currency). See Objective 4, "Set up currency profiles," for more information.

Exchange rates

Entering exchange rates in TimeWizard is optional. However, if you complete the exchange rate setup for the currencies your employees use, TimeWizard will perform rate calculations for you and display the results on expense sheets. You may update the rates as often as you wish.

TimeWizard's database accepts exchange rates up to four decimal places and performs calculations using four decimal places.

When TimeWizard is set up for exchange rate use, the rates display in the expense entry window and on the expense sheet. The expense sheets are initially set to round the rate to two decimal places for display purposes. You can configure the expense entry window and the expense sheet to display up to four decimal places by changing the setting of the FRACTIONSIZE property in the TWeb properties file on the TimeWizard Web server.

The box below describes one method of setting exchange rates. You may choose to update the rates by running a database script, instead. An example of a such a script is included at the end of this objective.

Setting the default currency and exchange rates

To set the default currency and exchange rates, follow these steps:

1. In the TimeWizard database table named Currency, locate the currency you want to designate as your company default currency. In the default_currency column, change the value to "1" (from "-1"). Only one currency in the column should have the value "1."
2. If you want to use exchange rates, note the identification (ID) of all the currencies you want to use, located in the currency_id column. You will need these IDs in step 4 below.
3. In the database table named effdate_currency, locate an ID of a currency you want to use. Modify the value in the exchange_rate column for that ID row to the exchange rate you want the system to use for the currency.
4. Modify the value in the eff_date column for that ID row to the date you want the new exchange rate to take effect in the system.
5. Repeat steps 4 and 5 above for each currency you want the system to use.
6. To complete the set up for exchange rates, on the TimeWizard Web server, in the TWeb properties file, set the EXCHANGERATE property to: Yes

Sample script for updating exchange rates in the database

Running a database script is optional.

For MS SQL Databases:

Run a statement similar to the statement in number 1 below from query analyser in MS SQL Server.

For Oracle Databases:

1. Run a statement similar to the one below from SQL Plus or SQL Plus worksheet in Oracle.
   ```
   update effdate_currency set exchange_rate=0.993,eff_date='02-Feb-2003'
   where currency_id=(select currency_id from currency where name='Euro');
   ```
2. Next, for Oracle databases only, run the following statement:
   ```
   commit;
   ```

Substitute values for MS SQL and Oracle Databases:

Run the statement(s) again for each currency that has an exchange rate you want to change, replacing three values for each currency. The three places where you must substitute an appropriate value are described below.

exchange_rate=	(Exchange rate that you want the system to use)
eff_date=	(Date the new exchange rate will be applied in the system)
name=	(Name of the currency to which the new exchange rate will be applied)

You must type currency names exactly as they appear in the Currency table in the database.

Sample script for changing the company default currency

Running a database script is optional.

For MS SQL Databases:

Run a statement similar to the statement in number 1 below from query analyser in MS SQL Server, substituting the appropriate value in the place described below:

name= (Name of the currency which you want to set as the company default)

For Oracle Databases:

1. Run a statement similar to the statement below from SQL Plus or SQL Plus worksheet in Oracle:

   ```
   update currency set default_currency=-1;
   update currency set default_currency=1 where name='Euro';
   ```

   Before running the statement, substitute the appropriate value in the place described below:

   name= (Name of the currency which you want to set as the company default)

2. Next, for Oracle databases only, run the following statement:

   ```
   commit;
   ```

You must type currency names exactly as they appear in the Currency table in the database.

Objective 4: Set up currency profiles

You can assign different default currencies to different employees by defining currency profiles and assigning employees or groups of employees to the profiles. Employees can still choose other currencies for expense entries.

Employees are initially assigned to the <default> profile. The <default> profile is originally set to the currency type US Dollar, but you may change this to another currency.

Defining a currency profile

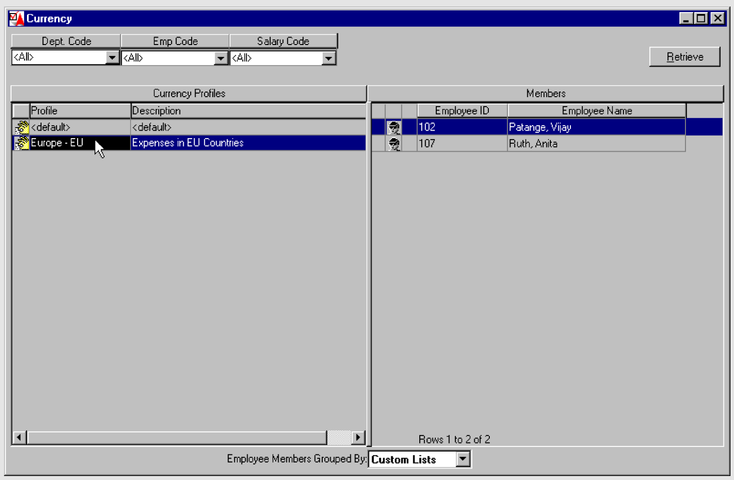


Figure 24.1

To define a currency profile, follow these steps:

1. Select Tools > Business Rules > Currency from the menu or click the Currency Profile icon to open the Currency window.
2. Select Profile > Add Profile from the menu or click the Add Profile icon on the toolbar to open the Currency Profile dialog box (Figure 24.1).
3. Enter a name and description for the profile in the text boxes.
4. Click the Currency drop-down box and select the default currency for the profile from the list.
5. Click "OK" to save the settings and close the dialog box.
6. Continue with the steps on the next page.

Changing the method of grouping employee members will remove any existing assignments of employees to currency profiles and will return all employees to the <default> profile.

Assigning members to a currency profile

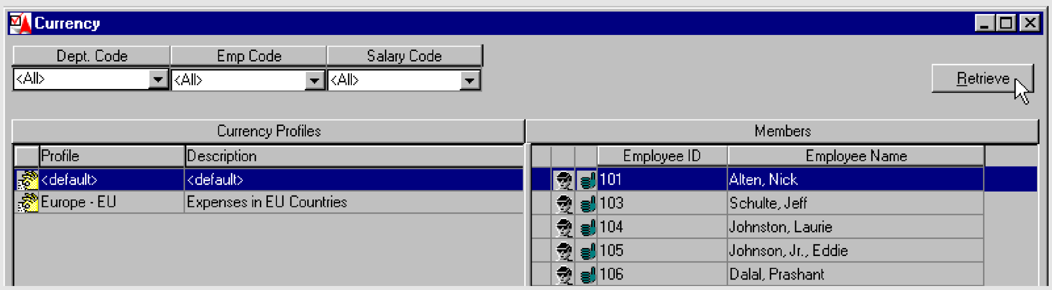


Figure 24.2

To assign members to a currency profile, follow these steps:

1. In the Currency window (Tools > Business Rules > Currency), click the Retrieve button on the right to display the list of profiles in the lower left frame (Figure 24.2).
2. To select a grouping method other than "Custom Lists," click the Employee Members Grouped By drop-down box.
3. Select employees or groups of employees from the Members list in the lower right frame and drag and drop them into the appropriate profile in the lower left.
4. To remove a member from a profile, select the profile. The profile's members display in the lower right. Select the members you want to remove and drag and drop them into the <default> profile.
5. To apply your assignments, close the window.

For more information on grouping methods, see Objective 1, "Understand Employee and Activity Grouping Methods," in the Introduction to Section Six, "Applying Your Business Rules to TimeWizard."

Objective 5: Define expense types

You set up expense categories called expense types in the Expenses area of TimeWizard.*enterprise*. You must have the Expense System Setup permission to access the Expense Type setup window.

An expense type may be a flat amount or an expense rate. Choose "Expense Rate" for expenses that have a rate per unit, such as mileage (rate per mile) or equipment rental (rate per day).

Defining an expense type

To define an expense type, follow these steps:

1. In your TimeWizard.*enterprise* Employee Home Page, open the Expenses menu on the main navigation bar. Select Expense Setup > Expense Type Setup from the menu.
2. In the Expense Type dialog box, enter the expense name and description in the text boxes.
3. Click the Amount Type drop-down box and select "Flat Amount" or "Expense Rate."
4. If you selected "Expense Rate," select a currency type for the rate in the Unit Rate drop-down box and enter a rate in the box to the left of the currency type.
5. If you selected "Expense Rate," enter the type of unit in the Unit Title box.
6. Click "Save" to save the settings.
7. Click "Return" to close the dialog box and return to your Employee Home Page. Or, to empty the text boxes and restore the drop-down boxes to their defaults, click "Reset." Clicking "Reset" will not delete settings that have been saved.
8. To review or edit a saved expense type, select View/Edit Existing Expense Type. Select the type from the drop-down box and click "Retrieve" in the lower left of the dialog box.
9. To delete a saved expense type, select Delete Existing Expense Type. Select the type from the drop-down box and click "Delete" in the lower left of the dialog box.

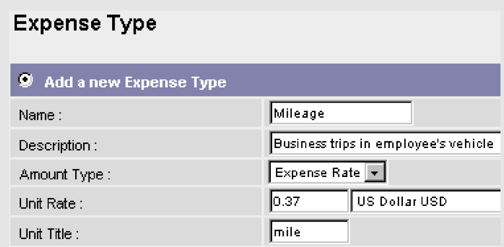


Figure 24.3

Objective 6: Define payment types

You set up payment types in the Expenses area of TimeWizard.*enterprise*. You must have the Expense System Setup permission to access the Payment Type setup window. Typical payments types are "Employee Paid" (for amounts to be reimbursed to the employee) and "Company Paid" (for amounts charged to the company).

When you define a payment type, you must set the payment type to add expense entries to the expense sheet total or to subtract expenses from the total. For example, you can set a payment type such as "Employee Paid" for expenses to be added to the total. Expense entries to be subtracted display as negative numbers.

NOTE

Setting the "Add to Total Expense" option to "No" can result in a negative total on the expense sheet. If you want to prevent this outcome, set all payment types to "Yes," which will add the expense amounts to the total.

TIP

If your company issues advances to employees, you may want to set up payment types in the following manner. Set a payment type to add employee expenditures to the total. Set another type to subtract the amount of an advance. If the expense sheet total displays a negative number, then the total shows the unspent amount to be returned to the company. If the total is a positive number, the total shows the amount to be reimbursed to the employee. A total of zero means that the employee's expenditures equaled the advance.

Payment type can be used to indicate payment method (e.g., corporate credit card, personal credit card, check, or cash) or other information you want to track.

Defining a payment type

To define a payment type, follow these steps:

1. In your TimeWizard.*enterprise* Employee Home Page, open the Expenses menu on the main navigation bar. Select Expense Setup > Payment Type Setup from the menu.

2. In the Payment Type dialog box, enter the payment name and description in the text boxes.

3. Select “Yes” to add the amount to the total on an expense sheet or “No” to subtract the amount from the total.

6. Click “Save” to save the settings.

7. Click “Return” to close the dialog box and return to your Employee Home Page. Or, to empty the text boxes and restore the drop-down boxes to their defaults, click “Reset.” Clicking “Reset” will not delete settings that have been saved.

8. To review or edit a saved payment type, select View/Edit Existing Payment Type. Select the type name from the drop-down box and click “Retrieve” in the lower left of the dialog box.

9. To delete a saved payment type, select Delete Existing Payment Type. Select the type name from the drop-down box and click “Delete” in the lower left of the dialog box.

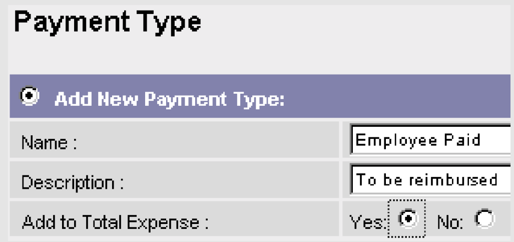


Figure 24.4

To learn to prepare expense sheets, see Chapter 10, “Preparing Expense Sheets,” in the *TimeWizard.enterprise User’s Guide*.

For information on performing expense sheet approvals, see Chapter 15, “Approving and Rejecting Expense Sheets,” in the *TimeWizard.enterprise User’s Guide*.

CHAPTER 25

Setting Report Category Profiles

The Report Categories business rules section enables you to control user access to all TimeWizard report categories. Simply put, users must have your permission to access certain reports in TimeWizard. You control access to TimeWizard users by setting up report categories profile groups and assigning employee members to appropriate groups.

Objectives

When you have finished this chapter, you should be able to do the following

1. Navigate the Report Categories frame
2. Define a reports category profile group
3. Assign members to a reports category profile group
4. Edit a reports category profile group
5. Delete a reports category profile group

Objective 1: Navigate the Report Categories frame

From the Report Categories area, you can assign and maintain user access to all TimeWizard report categories. Table 22.1 defines each toolbar icon used in this chapter.

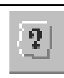
Navigating the Report Categories frame

To open the Report Categories frame, follow either of these steps:

1. Click on the Report Categories icon. 
2. Select Tools > Business Rules > Report Categories from the TimeWizard main menu.

Figure 22.1

Table 22.1: Report Categories Icons

Permissions Icons	Definition
	The Add Profile icon opens an empty Report Codes Profile dialog box.
	The Delete Profile icon deletes a selected Report Categories profile.
	The Edit Profile icon opens the Report Codes Profile dialog box with data for a selected Report Categories profile.

Objective 2: Define a reports category profile group

The report categories in the Reports Codes Profile dilaog box refer to typical levels of TimeWizard users. Any profile that you create is not limited to a single report category. In other words, you can pick and choose among all of the report category selections to create a unique reports category profile group. Table 22.2 explains all of the pre-defined selections available in the Reports Codes Profile dialog box. These are the default categories and reports that come with TimeWizard.

The Default Reports Category Profile contains all employees who do not belong to any other profile. You can rename—but not delete—the default profile. You create new reports category profile groups so that groups of employees are governed by different restrictions.

Defining a reports category profile group

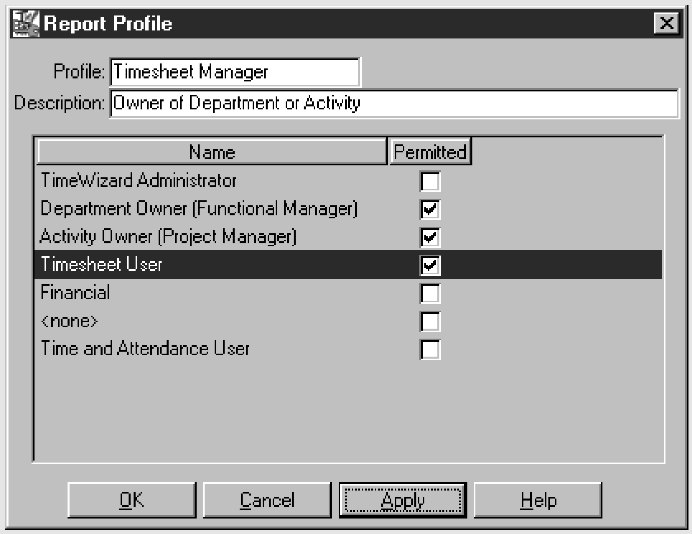


Figure 22.2

To define a reports category profile group follow these steps:

1. Open the Report Categories window (Tools > Business Rules > Report Categories).
2. Click the Add Profile icon to open the Reports Codes Profile dialog box (Profile > Add Profile).
3. Type the name and description of the reports category profile group in the text boxes.
4. Check every reports category box appropriate to the profile group. Table 22.2 lists each report included in the report categories.
5. Click "Apply" to save the settings but remain in the dialog box, or click "OK" to save the settings and close the dialog box.

Example Figure 22.2 shows an example Reports Codes Profile dialog box in which a new reports category profile group called Timesheet Manager has been created. In this example, the profile group members have permission to run reports from the following report categories: Department Owner, Activity Owner, Timesheet User.

Table 22.2: Report Categories

Report Categories	Available Reports
TimeWizard Administrator	Activity Summary Employee Profile Missing Approvals Missing Timesheet Resource Code Associations Timesheet Audit Report Timesheet Status Timesheet Summary
Department Owner (Functional Manager)	Bar Chart for Department Owners Employee Profile Expense Report Missing Approvals Missing Timesheet Pie Chart for Department Owners Resource Assignments for Department Owners TAS Resource Assignments for Department Owners TAS Timesheet for Department Owners Time and Attendance Summary Timesheet Report for Department Owners Timesheet Status Timesheet Summary
Activity Owner (Project Manager)	Activity Summary Bar Chart for Activity Owners Pie Chart for Activity Owners Resource Assignments for Activity Owners Timesheet Summary
Timesheet User	Timesheet Report
Financial	Activity Summary Bar Chart for Activity Owners Bar Chart for Department Owners Billing Report Expense Report Pie Chart for Activity Owners Pie Chart for Department Owners Timesheet Summary
Time and Attendance User	TAS Timesheet
<none>	

Objective 3: Assign members to a reports category profile group

When you assign TimeWizard users to a specific reports category profile group, they are—as members of that group—bound by its permissions and restrictions.

Assigning members to a reports category profile group

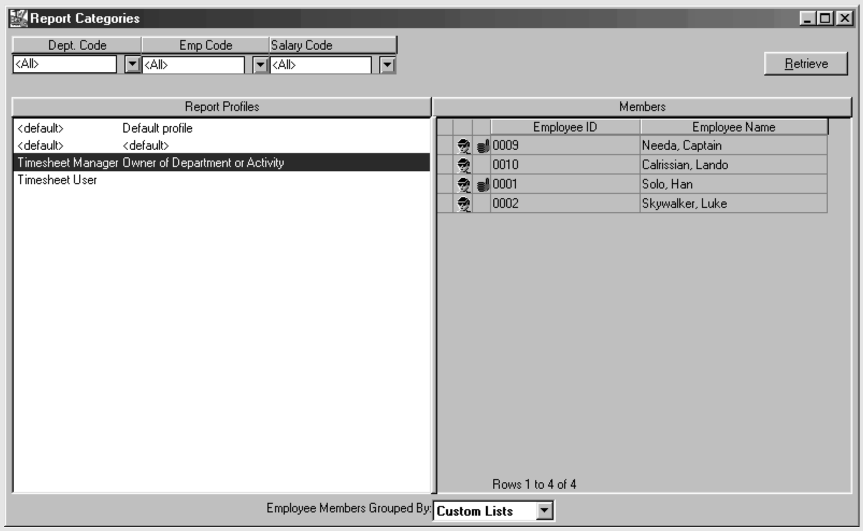


Figure 22.3

To assign members to a reports category profile group follow these steps:

1. Open the Report Categories window (Tools > Business Rules > Report Categories).
2. Choose an employee grouping method (see "Employees Grouping Methods," in the Introduction to this section).
3. To view all available members, select "<Default>" in the Report Categories window (the members listed are "members" of the "profile group" named "<Default>"). Note that the <Default> profile can be modified (renamed) but never deleted.
4. Drag and drop each appropriate employee from the list in the Members box to the appropriate profile group in the Reports Category Profile box.

TIP

In the members box, you can sort the display lists by clicking on the Employee ID tab and the Employee Name tab.

Objective 4: Edit a reports category profile group

When you edit a reports category profile group, you automatically change the permission settings for all of its members.

Editing a reports category profile group

To edit a reports category profile group, follow these steps

1. Select a reports category profile group.
2. Click the Edit Profile icon to open the Reports Codes Profile dialog box (Profile > Edit Profile).
3. Modify the profile information as desired.
4. Click "Apply" to save the settings but remain in the dialog box, or click "OK" to save the settings and close the dialog box.

Objective 5: Delete a reports category profile group

When you delete a reports category profile group, its members return to the <Default> group. You cannot delete the <Default> profile, because its members are those not belonging to any other group.

Deleting a reports category profile group

To delete a reports category profile group, follow these steps

1. Select the desired profile group.
2. Click the Delete Profile icon (Profile > Delete Profile). Members of deleted profiles return to the <Default> profile.

Summary

In this chapter, you have learned how to control access to TimeWizard reports by creating report category profile groups and assigning members to appropriate groups.

C H A P T E R 26

Setting Up Reports

TimeWizard provides for a number of pre-installed report categories and reports. In addition, it allows for customized report categories and reports to be created and added for use within TimeWizard. In this chapter you learn how to setup custom report categories and reports, and how to setup the enterprise web configuration.

Refer to the TimeWizard Guide to Reports for additional information on pre-installed report categories, pre-installed reports, and running reports.

Objectives

1. Define report categories
2. Define reports
3. Set up the *enterprise* Web Configuration

The reports definition is a simple process. First, you create report categories. Second, you create new reports and specify whether each is designed to expect parameter input at runtime. Third, you assign individual report files to each report category. Finally, you assign report categories to report profiles that enable specified users to have access to those report categories and reports contained within. See Chapter 22, Setting Report Category Profiles, for information on setting up report category business rules.

Objective 1: Define Report Categories

From the Define Report Categories dialog box, you can create report categories that will later contain individual report files. For example, a report category named “Resource Utilization” might include reports such as employee hours by activity, employees by department, or employees who own departments.

Defining Report Categories

To add a new category, follow these steps:

1. To open the Define Report Categories dialog box, select Tools > Reports > Define Categories from the TimeWizard main menu.
2. Click on the Add command button.
3. Enter the name of the report category in the Category Name text box.
4. Enter the path to the report category folder in the Path text box. To enter an existing path, click on the Browse button, and navigate to and select the report category folder. This designates the location of the folder that contains the individual report files.
5. Click OK to save the settings and exit the dialog box, or Apply to save the changes and remain in the dialog box..

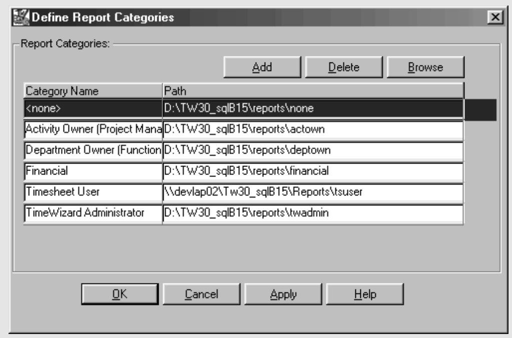


Figure 23.1

To delete a report category, follow these steps:

1. Select the report category you want to delete.
2. Click on the Delete command button.
3. Click OK to save the settings and exit the dialog box, or Apply to save the changes and remain in the dialog box.

NOTE

Before deleteing a report category you must first:

1. Delete all associated reports see Objective 2 for additional information).

2. Remove (uncheck) the category from any Report Category business rules (see Chapter 22, Setting Report Category Profiles, for additional information.

Objective 2: Define Reports

From the Define Reports dialog box, you can create report or import reports, specify whether each report is designed to expect parameter input at runtime, and assign reports to appropriate report categories.

NOTE For any newly created report category you must first select (check) the category in at least one Report Category Business Rule Profile to which you belong before it becomes available to have reports assigned to it. See Chapter 22, Setting Report Category Profiles, for information on setting up report category business rules.

Defining Reports and Identifying Report Parameter Specifications

To add a new report, follow these steps:

1. To open the Define Reports dialog box, select Tools > Reports > Define Reports from the TimeWizard main menu.
2. From the Category drop down menu, select the report category to which you want to assign reports.
3. To add a new report, click the Add command button.
4. Enter the name of the report in the Report Name text box. To copy an existing report, click on the Browse button and select the report file.
5. Enter the description of the report in the Description text box.
6. Specify whether the report is designed to expect parameter input at runtime. You select (yes or no) from the following options: Parameters, Period End, Depart ments Owned, EmpID. Table 23.1 explains each report option.
7. Click OK to save the settings and exit the dialog box, or Apply to save the changes and remain in the dialog box.

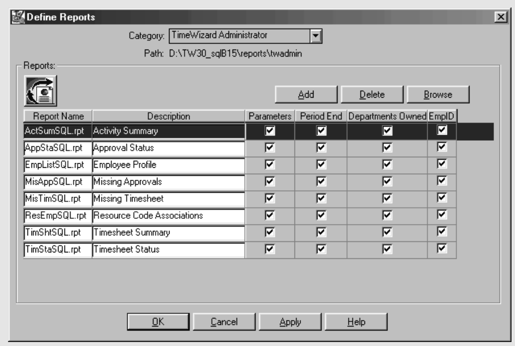


Figure 23.2

To delete a report, follow these steps:

1. Select the category that contains the report you want to delete.
2. Select the report.
3. Click on the Delete command button.
4. Click OK to save the settings and exit the dialog box, or Apply to save the changes and remain in the dialog box.

NOTE The report file is not physically deleted, rather the reference to it is deleted from the category.

Table 23.1: TimeWizard Report Definition Options

Reports Options	Explanation
Parameters	These specifies whether or not the report is designed to expect parameter input at run time.
Period End	This specifies whether or not the report was designated to accept period end date filtering information at runtime. The report must use a parameter name of Period_Enddate.
Departments Owned	This specifies whether or not the report was designated to accept departments owned filtering information at runtime. The report must use a parameter name of Departments_owned.
EmpID	This specifies whether or not the report was designated to accept employee ID filtering information at runtime. This is for reports that are to be run by employees that only have the need to see their own data. The report must use a parameter name of EmpID.

Objective 3: Set up the enterprise Web Configuration

The *enterprise* Web Configuration setup process enables you to run interactive, presentation-quality reports over the Internet. This is perhaps the most powerful feature of TimeWizard.*enterprise* in that it enables you not only to capture valuable business data via the web but also to analyze and act upon that information while online.

Setting up the *Enterprise* Web Configuration

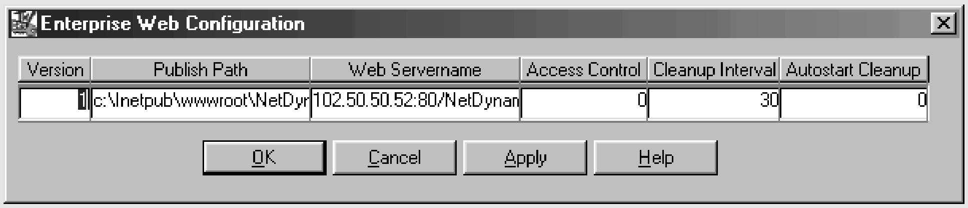


Figure 23.3

To set up the *Enterprise* Web Configuration, follow these steps:

1. To open the *Enterprise* Web Configuration dialog box, select Tools > Reports > Enterprise Web Configuration from the TimeWizard main menu.
2. Specify the configuration setting for the following selections: Version, Publish Path, Webservername, Access Control, Cleanup Interval, Autostart Cleanup. Table 23.2 explains each configuration setting. See the *TimeWizard Implementation Guide* provided on the installation CD for further information.
3. Click OK to save the settings and exit the dialog box.

Table 23.2: TimeWizard.*enterprise* Configuration Settings

Configuration Settings	Explanation
Version	This is a TimeWizard internal designation. The setting is always 1.
Publish Path	This identifies the web server directory where the reports will be "published".
Web servername	This identifies a virtual path to the web server directory where the published reports will be found.
Access Control	This is a TimeWizard internal designation. The setting is always 0.
Cleanup Interval	This is a TimeWizard internal designation. The setting is always 30.
Autostart Cleanup	This is a TimeWizard internal designation. The setting is always 0.

Summary

In this chapter, you learned about how to create and delete customized report categories, add and delete reports from specified categories, add and delete reports from specified categories, and how to set up the TimeWizard.*enterprise* web reporting configuration settings.

SECTION SEVEN

Sharing Information Between TimeWizard and Other Corporate Systems

Can We Talk?

In today's business climate, the need for accurate and timely information is paramount. Successful companies cannot afford to have isolated departments duplicating efforts or even competing against one another. Rather, each department must be willing and able to share its data so that the company as a whole can benefit. Corporate applications that contribute to the overall success of a company must be able to interface with one another to be fully effective.

TimeWizard's Interface Controller enables you to setup and maintain interfaces for one- and two-way transfers of data to and from your TimeWizard system. By allowing TimeWizard and your other corporate systems to communicate with one another, you ensure that data from one system has the same meaning company wide. These interfaces keep TimeWizard and your other corporate systems in synch without redundant data entry. In addition, you can setup TimeWizard to perform scheduled processes.

The interfaces enable you to use your application of choice for all of your business efforts. For example, you may prefer to manage your projects and activities in Microsoft Project 98 and your Human Resources efforts in Peoplesoft. An interface with these systems enables you to populate TimeWizard with the appropriate project and personnel records. Once the data is approved or updated, TimeWizard can update you external system, making manual updates unnecessary.

This section includes the following:

Introduction to the TimeWizard Interface Controller

The Interface Controller enables you to set up and maintain all TimeWizard interfaces, schedule interface intervals, and create re-usable filters and database profiles for use with multiple interfaces.

Objectives

1. Overview of TimeWizard Interface Types
2. Overview of Running TimeWizard Interfaces
3. Navigate the Interface Controller window
4. Execute TimeWizard Interfaces
5. Browse Interface Log Files
6. Set up the Interface Interval
7. Review the Interface Status
8. Create database profiles
9. Delete database profiles
10. Edit database profiles
11. Filter interface data

Objective 1: Overview of TimeWizard Interfaces

This introduction briefly describes each type of interface available through the Interface Controller.

NOTE TimeWizard also enables you to setup the execution of an interface of your own design. See Chapter 26: Working with Custom Applications.

The TimeWizard Interface Controller has the following interface types:

ProjectLinks

TimeWizard provides automated links to selected project management systems, allowing two-way transfer of data: from your project management system to TimeWizard and from TimeWizard to your project management system.

NOTE Each TimeWizard ProjectLink has its own supplement to the TimeWizard Administrator's Guide. Refer to the appropriate supplement for detailed usage instructions.

TimeWizard provides links for the following project management systems

- Microsoft Project 98
- Primavera Project Planner (P3)
- Business Engine (ResourceServer and ProjectServer)

The ProjectLinks enable you to create TimeWizard timesheet activities and assignments automatically from your project management system (rather than having to enter them manually). Employees then can enter time for these assignments on their timesheets. TimeWizard captures the following project-related data:

- Actual Start/Finish Dates
- Planned Start/Finish Dates
- Early Start/Finish Dates
- Estimate to Complete in Hours
- Original Planned Hours
- Initial Actual Hours
- Actual Hours Accumulated

Once the data is approved, TimeWizard can update your project management system with this information, making manual updates unnecessary.

Databridge Toolkit

TimeWizard provides the capability for you to create automated exports to other systems within your organization—such as Payroll, Accounting, Human Resources, etc.—allowing a one-way transfer of data from TimeWizard to your selected system.

Table Retrievals

TimeWizard enables you to import and update data from other systems in your company to your TimeWizard system.

AutoPopulate

TimeWizard enables you to have time entered automatically on timesheets of employees who are designated as AutoPopulate users.

Close Period: Override

TimeWizard enables you to close the oldest period currently open, even if timesheets in the period have missing approvals.

Exception Processor

TimeWizard enables you to specify circumstances under which you want to have exception logs (specifying such conditions as missing timesheets, approvals, or rejected timesheets) sent via e-mail to specified individuals within your company.

NOTE

The ProjectLinks are available only if you have purchased the add-on systems.

Objective 2: Overview of Running TimeWizard Interfaces

Introduction to Distributed Computing

Distributed computing allows you to get the most out of your investment in the client/server architecture. By building distributed applications, you can:

- Centralize business logic on servers.
- Partition application functions between the client and the server, thereby reducing the client workload.
- Make your applications scalable and easy to maintain.
- Increase application performance by utilizing higher-end server hardware.

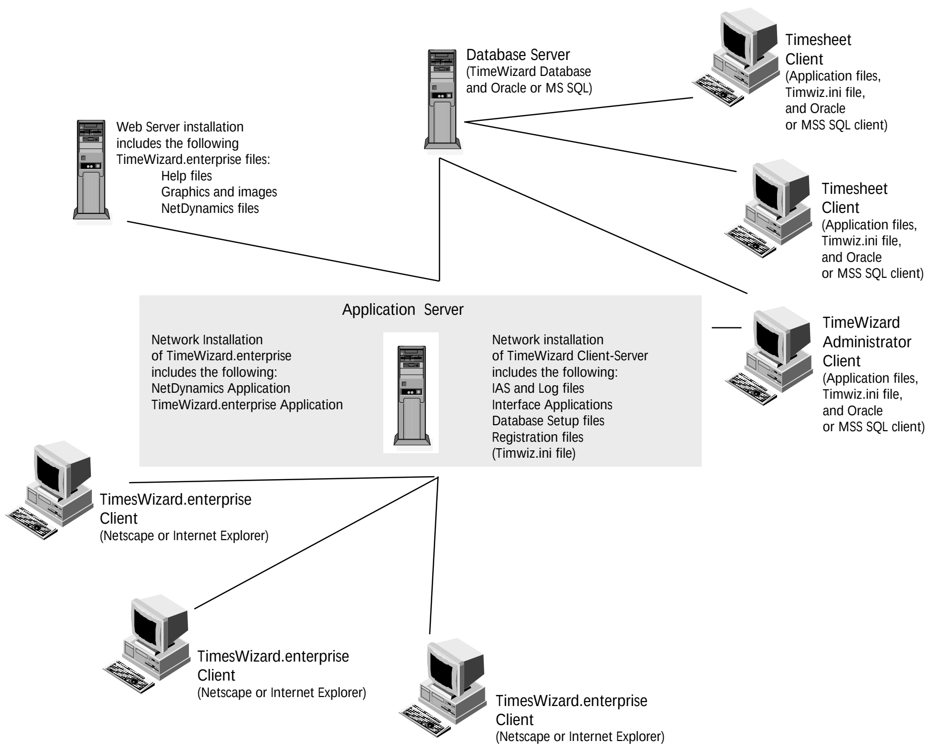


Figure I.1

Running the Interfaces from an Application Server

Import and export processes tend to consume substantial computer resources. In the interest of efficiency, security, and convenience, the TimeWizard data interfaces must be run on an application server, with the execution initiated and controlled from a TimeWizard Administrator client workstation.

NOTE The Administrator application does not have to be running for the scheduler/interfaces to run.

Figure I.1 illustrates the TimeWizard Application Environment, which outlines the relationship between the TimeWizard administror/client machines, the TimeWizard.*enterprise* web server, the TimeWizard database, and the application server.

Setting up the TimeWizard Server Application

The server application is stored and executed on an application server. The server application also is required to be in run mode at all times. The traffic signal displayed on the application server's main window indicates whether the service status is active or inactive. The green light indicates it is active; the red light indicated it is inactive. In addition you can start or stop the service manually, if necessary.

You are required to assign a port number for the application/service in the SERVICES file on the application server. The TimeWizard server application requires a unique port number on the server machine.

For example, you could assign a port number as follows in the \\WINNT\SYSTEM32\SERVICES file:

```
tw_serv    10014/tcp         tw_serv
tw_serv    10014/udp
```

The InterfaceApp.ini file keeps Interface applications information such as Status, Start time, and Stop time. The file gets created every time when TimeWizard server starts. It has three sections:

- Interface Application, which keeps status information for Interface applications based on the control ID, which can be viewed in the Interface Controller.
- Start Time, which keeps date and time stamp when an application has started based on the control ID.
- Stop Time, which keeps date and time stamp when an application has stopped execution based on the control ID.

Setting up the TimeWizard Administrator Application

In the TimeWizard Administrator system Hosts file, you are required to declare the TCP/IP address of the application server where the TimeWizard server application resides.

In addition, you must also identify the HostName and Port number under the [Application Server] heading in the Timwiz.ini file:

```
HostName =      Dev005
Port =          10014
IP Address =    DEV0005
```

Objective 3: Navigate the Interface Controller window

The TimeWizard Interface Controller gives you quick access to manage all of your interfaces between TimeWizard and your other corporate applications. Table I.1 explains the interface commands of the Interface Controller window.

Navigating the Interface Controller window

To open the Interface Controller window, follow either of these steps:

1. Click on the Interface Controller icon on the TimeWizard Administrator toolbar.
2. Select Tools > Interface Controller from the TimeWizard main menu.

NOTE: If the application server is not running, the Interface Controller will not connect and will kick you out.

Figure I.2

Example Figure I.3 shows an Interface Controller window in which we have created a DataBridge, Table Retrieval, Exception Processor, a ProjectLink Retrieval, and a close period override. For each interface, we have specified appropriate intervals.

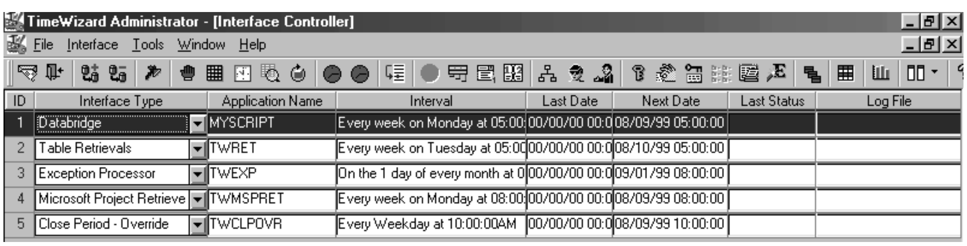
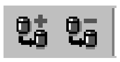
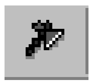
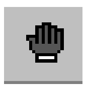
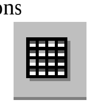
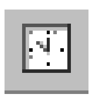
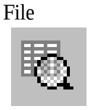
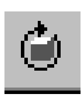
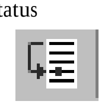


Figure I.3

Table I.1: Interface Controller Commands

Interface Controller Commands	Explanation
Add/Delete Interface 	These commands add or delete an Interface row in the Interface Controller window.
Execute Now 	This command runs a selected interface.
Stop Interface 	This command stops a selected interface.
Setup Options 	This command opens the setup windows for a selected interface.
Interval 	This command opens the Change Interval dialog box for a selected interface and enables you to schedule an interface interval.
Browse Log File 	This command enables you to browse the log file for the selected interface.
Refresh 	This command refreshes the Interface Controller window so that the most current data is displayed.
Start/Stop Scheduler 	These commands start or stop the scheduler on the application server.
Interface Status 	This command opens the Interface Status dialog box that displays the ID, start and stop times, and current status (running or idle) of each interface on the application server.

Objective 4: Execute TimeWizard Interfaces

The execute interface command runs the selected interface in accordance to your setup and scheduling parameters.

Executing TimeWizard interfaces

To execute TimeWizard interfaces, follow these steps:

1. In the Interface Type column of the Interface Controller window, select the interface you want to run.
2. To execute the selected interface, click the Execute Now icon or select Interface > Execute Now from the main menu.
3. To stop an interface during execution, click the Stop Interface icon or select Interface > Stop Interface from the main menu.

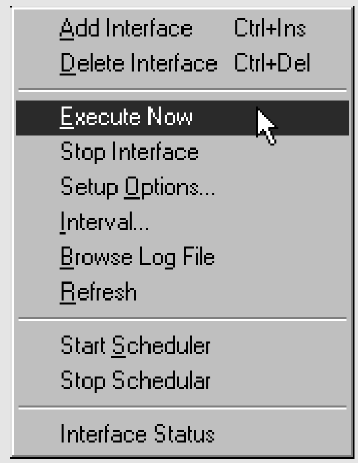


Figure I.4

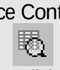
Objective 5: Browse Interface Log Files

The Interface Status dialog box displays the ID, start and stop times, and current status (running or idle) of each TimeWizard interface you have created in the Interface Controller.

Browsing interface log files

To execute browse interface log files, follow these steps:

1. In the Interface Type column of the Interface Controller window, select the appropriate interface.



2. To browse log files for the selected interface, click the Browse Log Files icon (Place Icon I.6 here.) or select Interface > Browse Log Files from the main menu.

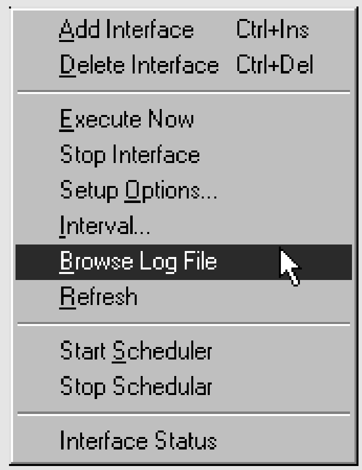


Figure I.5

Objective 6: Set up the Interface Interval

Setting up the interface interval enables you to run interfaces at scheduled times. In addition, you can sequence two or more interfaces to run in a specified order at specified times. Once you have set up an interface interval, click the Start Scheduler icon (Interface > Start Scheduler) to activate the TimeWizard scheduler. The scheduler then runs continually in the background and executes all scheduled intervals.

NOTE

When you run sequenced interfaces, each interface must run successfully before the next interface will run. In other words, if one interface in a sequence fails, the sequence stops and no subsequent interfaces run.

Setting Up the Interface Interval

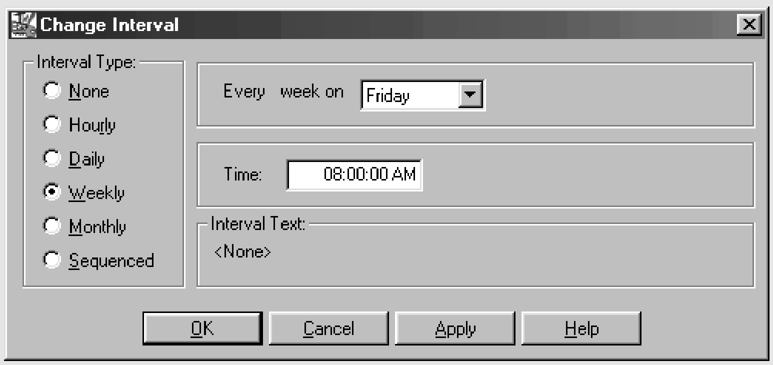


Figure I.6

To set up the interface interval, follow these steps:

1. To open the "Change Interval" dialog box, click on the Interval icon, select Interface > Interval from the main menu, or double-click on the interval field.
2. In the Interval Type area, click on the check boxes to select or deselect the intervals. Your interval options are hourly, daily, weekly, monthly, or sequenced. Table I.2 explains these options.
3. Use the appropriate drop-down boxes to select the corresponding interval specifications (e.g., specific day and time). For a sequenced interval, click on the interface drop-down box and select from the list of existing interfaces.
4. Click Apply to save the settings and remain in the Change Interval dialog box, or click OK to save the settings and exit the dialog box.
5. Click the Start Scheduler icon or select Interface > Start Scheduler from the main menu.
6. To stop a scheduled interface interval, click the Stop Scheduler icon or select Interface > Stop Scheduler from the main menu.

Table I.2: Interval Options

Interval Options	Explanation
None	This option specifies no interval selection.
Hourly	This option specifies that you have scheduled the interface to run hourly. You must specify the sequence of hours or minutes (e.g., every 2 hours).
Daily	This option specifies that you have scheduled the interface to run daily. You must specify the starting time each day (e.g., every day at 9:00 AM).
Weekly	This option specifies that you have scheduled the interface to run weekly. You must specify the starting time and day (e.g., every week on Monday at 9:00 AM).
Monthly	This option specifies that you have scheduled the interface to run monthly. You must specify the starting time and day (e.g., every first weekday of the month at 9:00 AM).
Sequenced	This option specifies that you have scheduled two or more interfaces to run in sequence. Note: If any interface in the sequence fails, the sequence stops so that no subsequent interfaces run.

Objective 7: Review the Interface Status

The Interface Status dialog box displays the ID, start and stop times, and current status (running or idle) of each TimeWizard interface you have created in the Interface Controller.

Reviewing the interface status

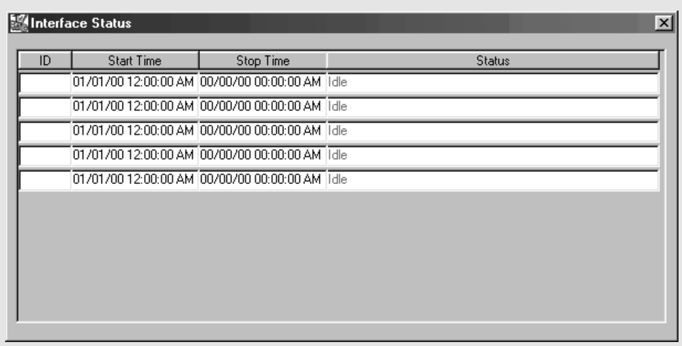


Figure I.6

To review the interface status, follow these steps:

1. To open the Interface Status dialog box, click on the Interface Status icon or select Interface > Interface Status from the main menu.
2. In the Interface Status dialog box, review the data and verify the status of each interface.

Objective 8: Create Database Profiles

By creating database profiles, you add the flexibility to re-use connectivity information across interfaces—without the effort of having to redefine it each time. The same database profiles can be used for Table Retrieval, DataBridge, and ProjectLink interfaces.

NOTE

The Database Profile command button (which opens the the Select Database Profile dialog box) is located wherever you are required to select a database profile for Table Retrieval, DataBridge, and ProjectLink interfaces. From the Select Database Profile dialog box, you can access the Database Profile Setup dialog box.

Creating Database Profiles

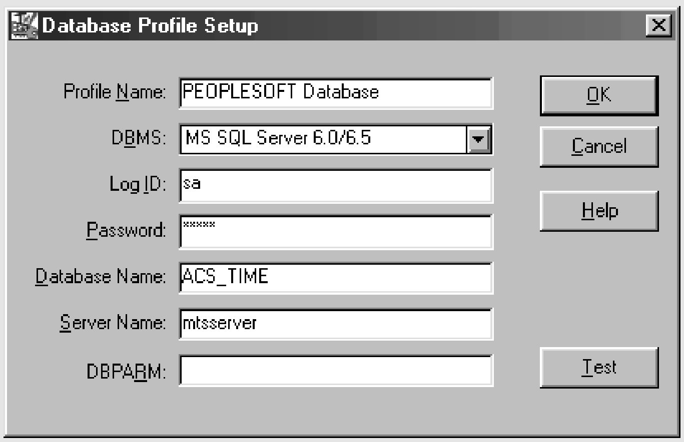


Figure I.8

To create database profiles, follow these steps:

1. Click the Database Profile command button to open the Select Database Profile dialog box.
2. Click the New command button to open the Database Profile Setup dialog box.
3. Enter the appropriate setup information in the data fields. Table I.3 explains each database profile setup selection.
4. Click the Test command button to verify your data. TimeWizard attempts to connect to the specified database.
5. Click OK to save the settings and exit the Database Profile Setup dialog box.

Table I.3: Database Profile Selections

Database Profile Selections	Explanation
Profile Name	This is the name you assign to the profile you are creating.
DBMS	Depending on prior implementation settings, your choices are as follows: 1) MS SQL Server 6.5/7.0 2) Sybase System 11.5/11.9 CTLIB 3) Oracle 7.3/8.0
Log ID	This is the login identification required to access the database.
Password	This is the password for the Login ID.
Database Name	This identifies the database for which you are creating a profile.
Server Name	This identifies the server on which the database resides. For Oracle 7.3, this should be an alias name preceeded by an "@" character, e.g., @acsserver.
DBPARM	This sets specialized DBMS connection parameters. Refer to DBMS documentation for specific instructions.

Objective 9: Edit Database Profiles

TimeWizard enables you to edit and maintain your database profiles so that you can ensure ease of connectivity to your external systems.

Editing Database Profiles

To edit database profiles, follow these steps:

1. In the Select Database Profile dialog box, click on a profile to select it.
2. Click the Edit command button to open the Database Profile Setup dialog box for the selected profile.
3. Edit the appropriate setup information in the data fields. Table I.2 explains each database profile setup selection.
4. Click the Test command button to verify your data. TimeWizard attempts to connect to the specified database.
5. Click OK to save the settings and exit the Database Profile Setup dialog box.

Objective 10: Delete Database Profiles

TimeWizard enables you to delete database profiles that you no longer require.

Deleting Database Profiles

To delete database profiles, follow these steps:

1. In the Select Database Profile dialog box, click on a profile to select it.
2. Click the Delete command button to delete the selected profile.
3. Click OK to save the settings and exit the Database Profile Setup dialog box.

Objective 11: Filter interface data

TimeWizard enables you to specify a filter to further define which records are processed. Specifically, the filter function allows you to build a test expression that then is applied to the inport and export fields. This limits the records being processed to those that meet the conditions of the expression.

NOTE The Filter command button (which opens the the Select Filters dialog box) is located wherever you are able to filter data for Table Retrieval, DataBridge, and ProjectLink interfaces. From the Select Filters dialog box, you can access the Filters dialog box.

Filtering interface data ***(continued on page 291)***

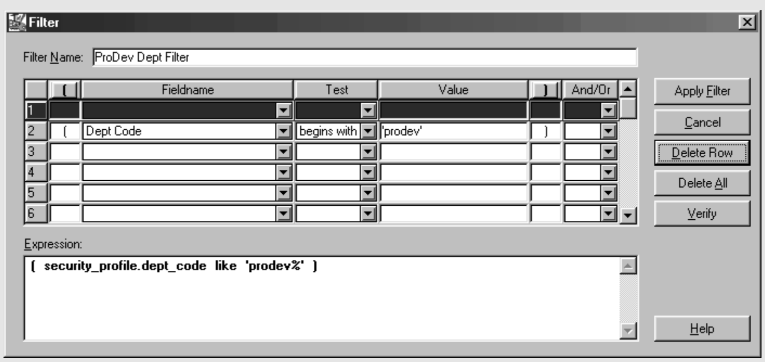


Figure I.9

To filter the interface data, follow these steps:

1. In the Filter dialog box, click on the Fieldname drop-down list and select the first fieldname you want to use for the filter test expression.
2. Click on the Expression drop-down list and select the expression.Table I.4 explains the expression options.

Filtering interface data ***(continued from page 290)***

3. Click on the value text box and enter the value to use for the test. The filter is case-sensitive: Description = "Project 1" is not the same as Description = "project 1."
4. If you are using more than one fieldname for the filter, you must use the parentheses to separate the expressions and a final set around the outermost expression. Click on the and/or drop-down list and select the appropriate condition.
5. Click on Verify to verify that your expression is valid. If the expression is valid, TimeWizard displays a Valid Expression dialog box. If it is not valid, TimeWizard displays a Invalid Expression dialog box, in which case you must correct the expression errors as necessary.
6. Click on Apply Filter. The filter expression is displayed on the "Field Layout" tab page.
7. To change the test expression, you can change individual criteria (e.g., fieldname, test expression, value), select and delete a row by clicking the Delete Row command button, or click the Delete All command button to delete the entire test expression and start over. Verify any changes or new expressions by clicking on the Verify command button.

Don't forget that if you are using more than one fieldname for the filter, you must use parentheses to separate the expressions and a final set around the outermost expression.

Table I.4: Filter Expressions

Filter Expressions	Explanation
=	The fieldname is equal to the value.
<	The fieldname is less than the value.
<=	The fieldname is less than or equal to the value.
>	The fieldname is greater than the value.
>=	The fieldname is greater than or equal to the value.
< >	The fieldname is not equal to the value.
begins with	The fieldname begins with the value.
contains	The fieldname contains the value.
ends with	The fieldname ends with the value.
is NULL	The fieldname does not contain data. Using this test expresion, you can filter on the absence of data in the fieldname.
is not NULL	The field name contains data. Using this test expresion, you can filter on all of the data contained in the fieldname.

Example Filter Expression 1

To retrieve project “Test Project”, the correct filter is:
(Project Title = “Test Project”)

Example Filter Expression 2

To retrieve task “coding” for project “Test Project”, the correct filter is:
((Project Title = “Test Project”) and
(Task Name = “coding”))

Example Filter Expression 3

To retrieve Projects “Test Project 1” and “Test Project 2”, the correct filter is:
((Project Title = “Test Project 1”) or
(Project Title = “Test Project 2”))

Example Filter Expression 4

To retrieve tasks “coding”, “testing”, and “qa” for project “Test Project”, the correct filter is:
((Project Title = “Test Project”) and
((Task Name = “coding”) or
(Task Name = “testing”)
(Task Name = “qa”)))

Example Filter Expression 5

To retrieve projects with Planned Start 11/20/98 and 11/30/98, the correct filter is:
((Planned Start = 11/20/98) or
(Planned Start = 11/30/98))

Summary

In this Introduction, you have been introduced to the TimeWizard’s Interface Controller, which enables you to set up and maintain interfaces for one- and two-way transfers of data to and from your TimeWizard system.

CHAPTER 27

Working with the DataBridge Toolkit

TimeWizard provides the capability for you to create automated links to other systems within your organization—such as those used for Payroll, Accounting, Human Resources, and Project Management—allowing a one-way transfer of data from TimeWizard to your selected system.

The DataBridge is a sophisticated export tool that requires some understanding of relational databases and of the data captured within TimeWizard. You can use the DataBridge interface to guide you through the scripting and setup process; however, you may need to seek technical assistance to achieve the desired results. If you are experienced in writing SQL statements, you can write your own script in a DataBridge text box.

In the DataBridge interface, script variables map out what data the DataBridge will gather for transfer. These "data maps" can be straight-forward variables if the information you want collected resides in a database table column. For more complex data collection, you can set conditions that TimeWizard must meet during the information gathering. You do this by scripting computed conditional expressions.

Objectives

1. Introduction to Scripting a DataBridge
2. Add a DataBridge Interface type to the Interface Controller window
3. Use the DataBridge interface to add a DataBridge script
4. Script a database variable
5. Script a computed variable
    - Script a computed constant variable
    - Script a computed sequenced variable

- Script a computed simple expression variable
- Script a computed conditional expression variable

6. Edit a script variable
7. Delete a script variable
8. Filter the DataBridge transaction data
9. Specify the output type
10. Script a database output target profile
11. Script a file output target profile
12. Edit a database output target profile
13. Clone a database output target profile
14. Delete a database output target profile
15. Create a file profile
16. Edit a file profile
17. Delete a file profile
18. Write your own script in SQL
19. Edit, clone, or delete a manual script

Objective 1: Introduction to Scripting a DataBridge

Building a DataBridge from TimeWizard to targeted systems contains three basic steps (though each step involves its own unique process). Table 24.1 explains these basic steps.

Table 24.1: Steps to Building a DataBridge

DataBridge Steps	Explanation
Step 1: Script Export Variables	In this step, you define the data elements that you want to extract from TimeWizard and export to your target application.
Step 2: Setup Filtering	In this step, you define the record selection criteria and, if necessary, build a test expression that is applied to the export fields.
Step 3: Script Export Target	In this step, you choose and define a database table or file to receive the exported data.

Creating DataBridge Scripts

The DataBridge Script Editor enables you to set up a data export by specifying the content of the data, computations required, and the output format. Lists of employees, activities, departments, and other database entities can be exported subject to standard filter conditions. More complex exports that involve accumulating transaction data or controlling updates to external systems are subject to additional setup requirements. These include the following:

- Defining the content to be extracted
- Computing fields using arithmetic or comparison operators and a limited conditional
- Accumulating transaction hours by specifying fields within which totals will be computed and output records created
- Filtering the selection of transactions by period or date ranges, activity attributes, employee attributes, period states, timesheet approval states, and other conditions

For each DataBridge script, users must specify the output format and destination. In so doing, you can create database profiles or file profiles that can be re-used for later exports. You have already assigned values to the export targets in the Code Values area of TimeWizard. We discussed this process in Chapter 4, Objective 5, in the section entitled, "Customizing TimeWizard."

Posting Transactional Data

When updates to other systems occur on a regular basis and comprise required input to those applications, several requirements arise for tracking and controlling the TimeWizard exports. When exported data is used to update a target system for operational purposes, the exported data should be identified accordingly. This indication is called "posting," which identifies both the TimeWizard record and the target system. The key purpose of posting is that it should prevent the user from posting the same data more than one time for each target system.

In the event that an export process fails due to hardware failure, power outage, or other reason, the user can roll back the postings that occurred during the failed process. This allows the user to rerun the export accurately.

Objective 2: Add a DataBridge Interface type to the Interface Controller window

To begin building a DataBridge, you must add a new Interface row in the Interface Controller window and select DataBridge as the interface type. Once you have added the DataBridge field to the Interface Controller window, you can begin the steps outlined in the Introduction to this chapter. For more information about the Interface Controller window, see the Introduction to Section 7: Sharing Information Between TimeWizard and Other Corporate Systems.

Adding a DataBridge

To add a DataBridge, follow these steps:

1. From the Interface Controller window, click the Add Interface icon .

   NOTE

2. Select DataBridge from the Interface Type data window. To locate the selection, scroll through the drop-down menu.

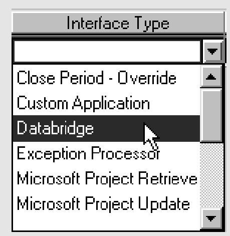


Figure 24.1

Objective 3: Use the DatBridge interface to add a DataBridge script

The first step in creating a DataBridge is to name the script you are about to write and specify your posting preferences. The DataBridge Script contains all of the key instructions for the DataBridge, i.e., what data it contains and where it is going to deliver that data. In the script, you define the variables, filters, and output targets.

Adding a DataBridge script

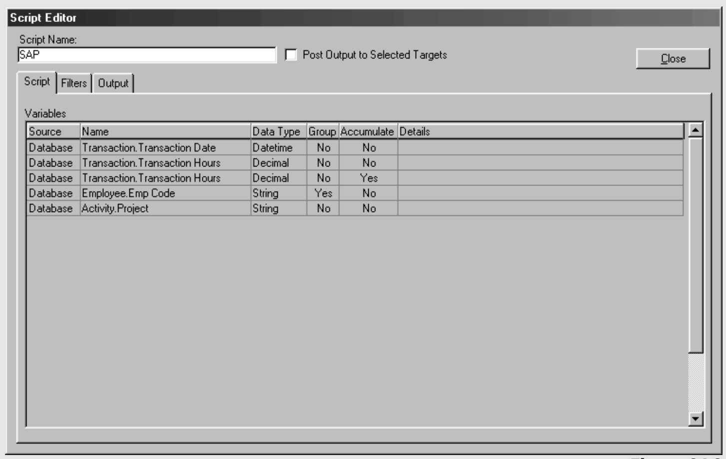


Figure 24.2

To add a DataBridge script, follow these steps:

1. From the Interface Controller window, select the DataBridge from the Interface Type column.
2. Click on the Setup icon or double-click on the DataBridge interface type cell to open the Script Editor window. 
3. Enter the name of the DataBridge in the Script Name data window.
4. Click on the check box to specify whether you want to post output to selected targets. For a detailed discussion about posting exported data, see Objective 1: Introduction to Scripting a DataBridge, "Posting Transactional Data," this chapter.

NOTE You created the overall list of DataBridge targets when you specified the Code Value Export Targets. The values you assigned designated certain external systems as targets for regular updates from TimeWizard.

Objective 4: Script a database variable

The script variables map out what data the DataBridge will gather for transfer. These "data maps" can be straight-forward variables if the information you want collected resides in a database table-column. In addition, you can specify whether you want to group by or accumulate certain variables.

TIP See the example script in Figures 24.4 through 24.7 for a start-to-finish view of this process.

Scripting a database variable

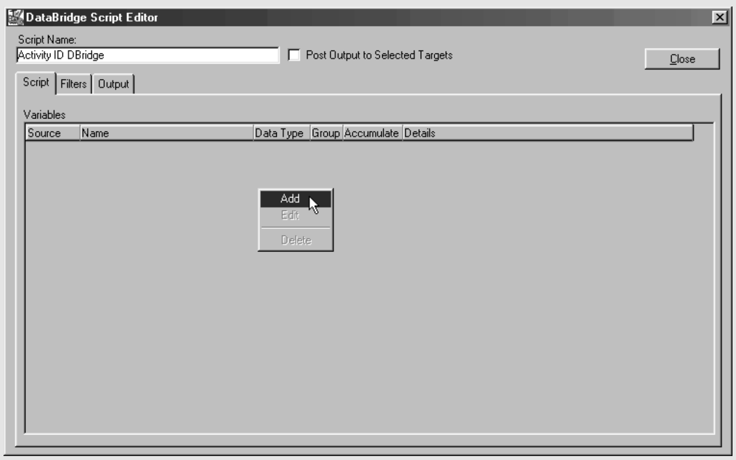


Figure 24.3

To script a database variable, follow these steps:

1. In the Script Editor window, click the Scripts tab. (This tab is the default setting when you first open the Script Editor window.)
2. Right-click in the empty area of the Variable section of the Scripts tab window to display the variable drop-down menu.
3. Select Add to open the Create/Edit Variable dialog box.
4. Select "Database (Table and Column)" as the Variable Type (See Figure 24.4). Click Next to continue.
5. Select a Table and then an associated Column for the variable. (See Figure 24.5). Specify if you want to "Sequence on this variable" by checking the box in the lower left. Table 24.2 and Example 1 explain this option. Click Next to continue or Back to return to the previous dialog box.

NOTE The Column selections change in accordance with each Table selection.

6. Specify if you want to "Group by" or "Accumulate" the variable. (See Figure 24.6). Table 24.2 explains these options. Click Next to continue or Back to return to the previous dialog box.
7. The last setup dialog box displays all prior selections. Review your variable settings before creating the variable. (See Figure 24.7). Click Finish to create the variable or Back to return to the previous dialog box.

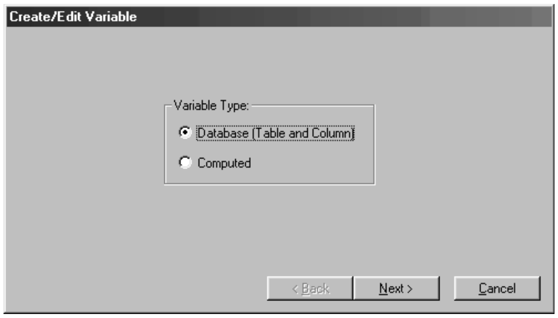


Figure 24.4

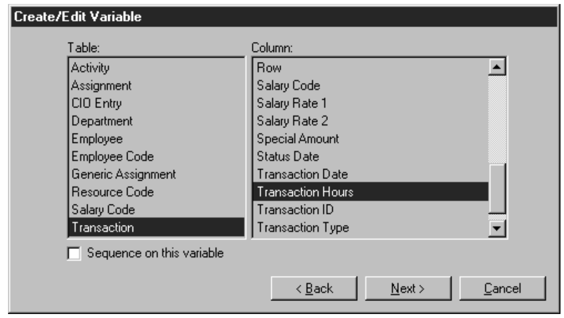


Figure 24.5

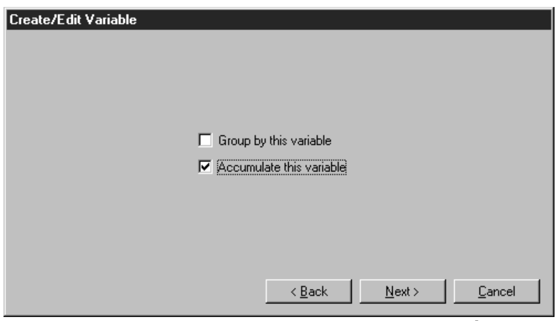


Figure 24.6

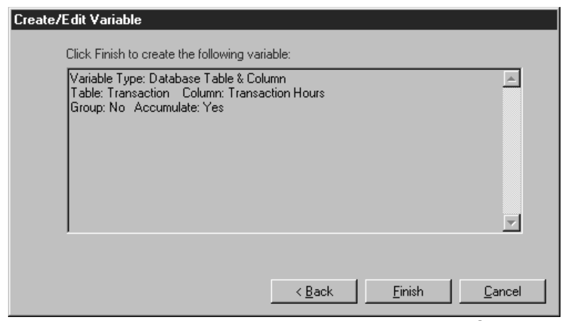


Figure 24.7

Example 1 We can create database variable scripts to tell our external target system how many employee records will be exported for each activity. In this example, we would follow these steps:

1. Add a database variable script for the Employee ID column in the Employee table and check the box to “Sequence on this variable.”
2. For the Employee ID variable, check the box to “Group by this variable.”
3. Add a database variable script for the Activity ID column in the Activity table.

Because we have sequenced on Employee ID, the values for Employee ID will be converted to numerals that act as a counter in the output.

Sample Output

Employee ID	Activity ID
001	82
002	82
001	95
002	95
003	95

Table 24.2: Variable Options

Variable Options	Explanation
Sequence on this variable	This option converts the values of the selected variable to sequentially incremented numbers (e.g., 1, 2, 3) to count the records for each identical value of another variable. For example, your export target system may need to know the number of transmitted assignment records for each employee. (See Example 1.)
Group by this variable	This option collects all identical values of the selected variable (e.g., a project in an activity field) in the selected records without summing the numeric values of another selected variable (e.g., transaction hours). This option then groups these records into a single common record. NOTE: Be careful when using this option. It can produce faulty results if the user is not familiar with the grouping functions within SQL.
Accumulate this variable	This option creates a sum total of the numeric values for the selected variable by adding the numeric values from the TimeWizard table. The total becomes part of the common record made by applying the "Group by" option. (See Example 2.) This option is most commonly used with the Transaction Hours variable, however, you may accumulate any numeric variable. NOTE: You can apply this option to only one variable per DataBridge. When you use this option, you must apply the "Group by" option to all other variables in the DataBridge. NOTE: Be careful when using this option. It can produce faulty results if the user is not familiar with the grouping functions within SQL.

Example 2 In Figures 24.4, 24.5, 24.6, and 24.7, we created a database variable script that accumulates (i.e., sums) numeric data from the Transaction Hours column of the Transaction table.

For the same Databridge interface, we might next script a database variable for an activity custom field. If we script a database variable for the column called "Project" from the Activity table, and apply the "Group by this variable" option, we can output a summary of transaction hours for each project in the database.

Sample Output

Project	Transaction Hours
B2B	640.00
eCommerce	367.50
Online	425.00

Objective 5: Script a computed variable

For more complex data collection, you can set conditions that TimeWizard must meet during the information gathering. You do this by scripting computed conditional expressions.

Due to the complex nature of scripting computed variables, this objective includes supplemental instructions for each Variable Value Type selection, see "Scripting a computed variable: Step 7a-7d," following step 9, below.

Scripting a computed constant variable *(continued on page 303)*

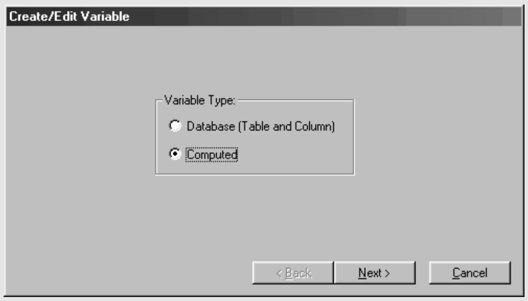


Figure 24.8

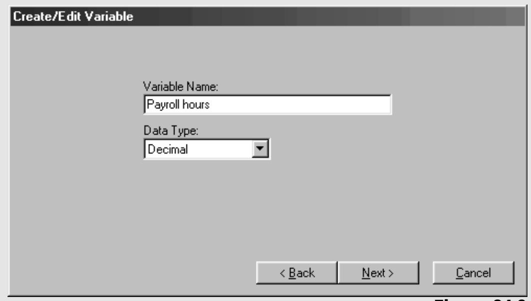


Figure 24.9

To script a computed constant variable, follow these steps:

1. In the Script Editor window, click the Scripts tab. (This tab is the default setting when you first open the Script Editor window.)

2. Right click in the empty area of the Variable section of the Scripts tab window to display the variable drop-down menu.

3. Select Add to open the Create/Edit Variable dialog box.

4. Select "Computed" as the Variable Type. (See Figure 24.8.) Click Next to continue.

5. Enter a name for the variable in the Variable Name data filed and select the Data Type from the drop-down menu. (See Figure 24.9.)

Your data type selections are as follows:
- Datetime
- Decimal
- Integer
- String

6. Select the Variable Value Type. (See Figures 7a, 7b, 7c, and 7d in the special instructions following step 9, below.)

Your value type selections are as follows:
- Constant Value
- Sequence
- Simple Expression
- Conditional Expression

Scripting a computed constant variable *(continued from page 302)*

Table 24.3 explains these options. Click Next to continue or Back to return to the previous dialog box.

7. For detailed instructions based on each Variable Value Type selection, see "Scripting a computed variable: Step 7a-7d," following step 9, below.
8. If applicable, specify whether you want to "Group by" or "Accumulate" the variable. (See Figure 24.10.) Table 24.2 (Objective 4, this chapter) explains these options. Click Next to continue or Back to return to the previous dialog box.
9. The last setup dialog box displays all prior selections. Review your variable settings before creating the variable. Click Finish to create the variable or Back to return to the previous

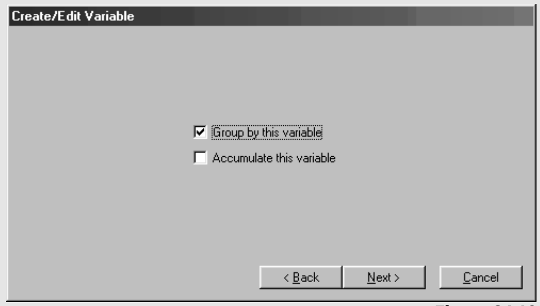


Figure 24.10

Step 7a: Scripting a computed constant variable

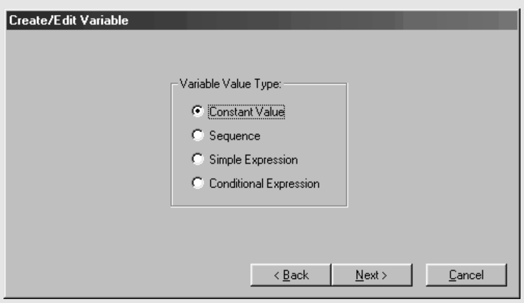


Figure 24.11

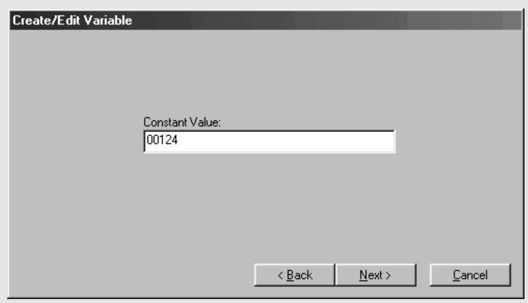


Figure 24.12

To script a computed constant variable, follow these steps:

1. Select "Constant" as the Variable Value Type. (See Figure 24.7a1.)
2. Enter the constant value in the data window. (See Figure 24.7a2.)
3. Click Next to continue or Back to return to the previous dialog box. (Proceed to Step 9, Objective 5.)

Example In Figures 24.11 and 24.12, we scripted a computed constant variable with a constant value of 00124.

Step 7b: Scripting a computed sequenced variable

To script a computed sequenced variable, follow these steps:

1. Select "Sequence" as the Variable Value Type. (See Figure 24.7b1.)
2. Click Next to continue or Back to return to the previous dialog box. (Proceed to Step 9, Objective 5.)

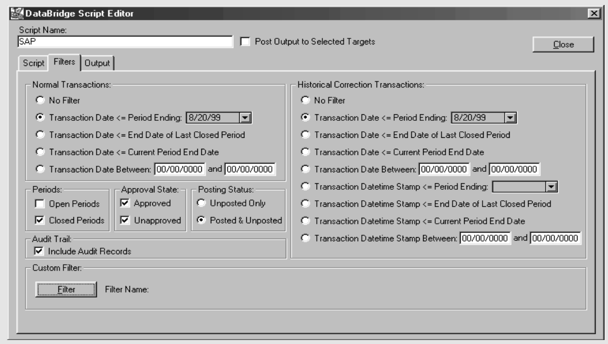


Figure 24.13

Table 24.3: Variable Value Types

DataBridge Steps	Explanation
Contrast Value	A set specified value that does not vary.
Sequence	A starting numeric value that will be sequentially incremented for each output record. For example: 001, 002, 003, etc.
Simple Expression	The value is a mathmatical statement not based on conditions. The simple expression is limited to the following operators: + (plus), - (minus), x (multiplied by), / (divided by).
Conditional Expression	The value is a more complex mathmatical "If, Then, Else" statement based on conditions. It "if" statement is limited to the following operators: < (less than), > (greater than), = (equal to), <= (less than or equal to), >= (greater than or equal to). The "Then" and "Else" statements are simple expressions limited to the following operators: + (plus), - (minus), x (multiplied by), / (divided by).

Step 7c: Scripting a computed simple expression variable

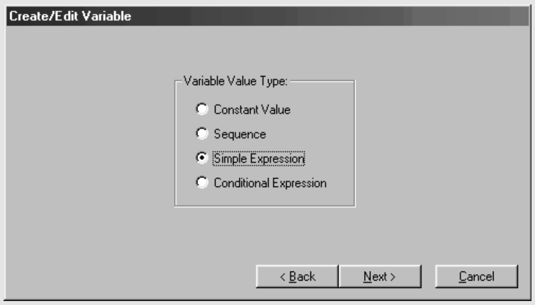


Figure 24.14

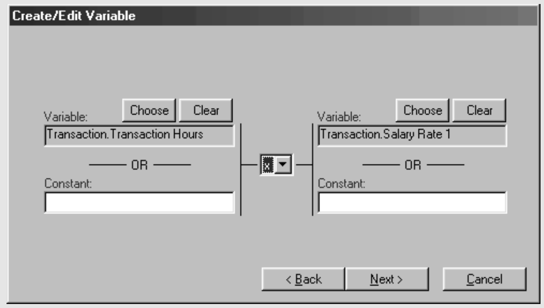


Figure 24.15

To script a computed simple expression variable, follow these steps:

1. Select "Simple Expression" as the Variable Value Type and click next. (See Figure 24.14)
2. Enter the variables or constant values in the data windows. (See Figure 24.15)
3. Click Next to continue or Back to return to the previous dialog box. (Proceed to Step 8, Objective 5.)

Example In Figures 24.14 and 24.15, we created a simple expression with the following statement: "Transaction, Transaction Hours multiplied by Transaction, Salary Rate 1."

Step 7d: Scripting a computed conditional expression variable

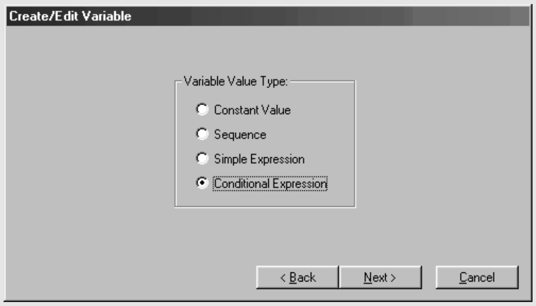


Figure 24.16

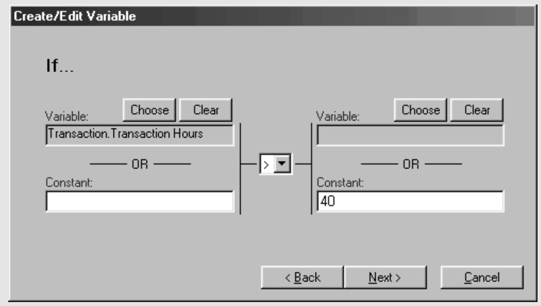


Figure 24.17

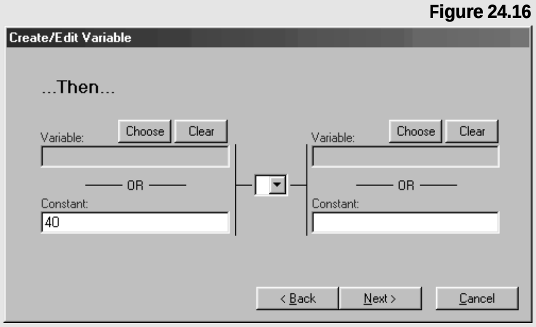


Figure 24.18

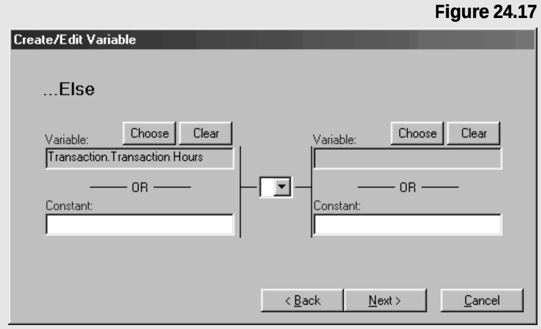


Figure 24.19

To script a computed conditional expression variable, follow these steps:

1. Select "Conditional Expression" as the Variable Value Type. (See Figure 24.16.)
2. In the "If" dialog box, enter the variables or constant values and the appropriate operators in the data windows. (See Figure 24.17.) Click Next to continue or Back to return to the previous dialog box.
3. In the "Then" dialog box, enter the variables or constant values and the appropriate operators in the data windows. (See Figure 24.18.) Click Next to continue or Back to return to the previous dialog box.
4. In the "Else" dialog box, enter the variables or constant values and the appropriate operators in the data windows. (See Figure 24.19.) Click Next to continue or Back to return to the previous dialog box. (Proceed to Step 8, Objective 5.)

Example In Figure 24.17, we began a conditional expression with the following "If" statement: "If Transaction, Transaction Hours is greater than 40. . . ."

In Figure 24.18, we continue the conditional expression with the following "Then" statement: ". . . Then 40. . . ."

In Figure 24.19, we conclude the conditional expression with the following "Else" statement: ". . . Else Transaction, Transaction Hours."

Objective 6: Edit a script variable

TimeWizard enables you to edit script variables to correct or redirect the DataBridge in gathering data for transfer. However, before editing a script, verify that your changes will not alter the accuracy of the DataBridge.

Editing a script variable

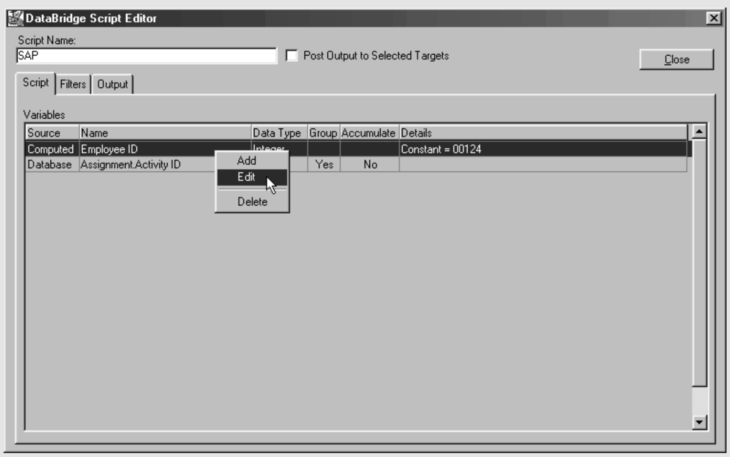


Figure 24.20

To edit a script variable, follow these steps:

1. In the Script Editor window, click the Scripts tab. (This tab is the default setting when you first open the Script Editor window.)
2. Right click on the variable row that you want to edit to display the variable drop-down menu.
3. Select Edit to open the Create/Edit Variable dialog boxes for the selected variable.
4. Make any changes necessary. Click Finish to save the corrections to the variable or Back to return to the previous dialog boxes and continue to make corrections.

Objective 7: Delete a script variable

You can delete a script variable at any time. However, before deleting a script, verify that your changes will not alter the accuracy of the DataBridge.

Deleting a script variable

To delete a script variable, follow these steps

1. In the Script Editor window, click the Scripts tab. (This tab is the default setting when you first open the Script Editor window.)
2. Right click on the variable row that you want to edit to display the variable drop-down menu.
3. Select Delete to open the Delete confirmation dialog box for the selected variable.
4. Click Yes to delete the selected variable.

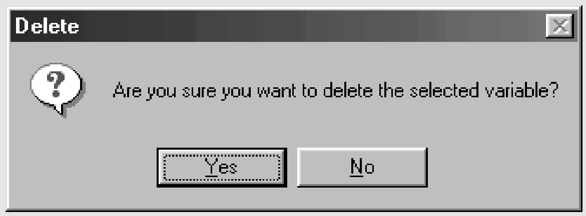


Figure 24.21

Objective 8: Filter the DataBridge transaction data

TimeWizard enables you to specify a filter to be used in the DataBridge to further define which transaction data is shared. If your script variables do not direct the DataBridge to gather any transactional data, you may select No Filter in the normal transactions and historical corrections filtering settings areas. Table 24.4 navigates the Transaction Filters window and explains each area. Tables 24.5 and Table 24.6 explain the filtering options for Normal Transactions and Historical Correction Transactions.

Table 24.4: Transactions Filter Window Areas

Transactions Filter Window Areas	Explanation
Normal Transactions	This area enables you to specify the data for which you want to filter transactions.
Historical Transactions	This area enables you to specify the dates for which you want to filter historical corrections.
Periods	This area enables you to specify whether you want to filter open or closed periods (yes or no) or both for the transaction dates already selected.
Approval State	This area enables you to specify whether you want to filter approved or unapproved timesheets (yes or no) or both for the transaction dates already selected.
Posting Status	This area enables you to specify whether you want to filter only unposted data or posted and unposted data (yes or no) for the transaction dates already selected.
Include Audit Records	This area enables you to specify whether you want to include audit records (yes or no) for the transaction dates already selected.
Filter	This command button enables you to setup additional filtering parameters for the DataBridge overall.

NOTE

For filtering Historical Corrections Transactions, Transaction Date refers to the date of the actual transaction for which a historical correction was made. Transaction Datetime Stamp refers to the date and time that the historical correction was made, regardless of the date transaction that the date was posted to.

Example Assume that on 08/20/99 you make a historical correction to a transaction dated 02/15/99. Your Transaction Date equals 02/15/99, and your Transaction Datetime Stamp equals 08/20/99.

Filtering the DataBridge transaction data

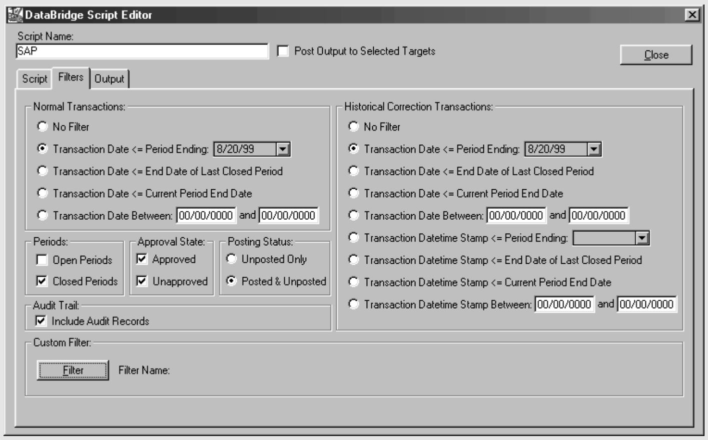


Figure 24.22

To filter the DataBridge transaction data, follow these steps:

1. In the Script Editor window, click the Transaction Filters tab.
2. Specify the normal transactions filtering settings. Table 24.6 explains each selection.
3. Specify the historical corrections filtering settings. Table 24.7 explains each selection.
4. Specify the filtering settings for periods, approval state, and posting status. Table 24.5 explains each area.
5. Specify whether you want to include audit records.

Table 24.5: Normal Transactions Filter Options

Normal Transactions Filter Options	Explanation
No Filter	This is the default option, which specifies no transaction filter.
Transaction Date <= Period Ending	In this option, you filter all transactions that have a transaction date on or before a period ending date that you specify.
Transaction Date <= End Date of Last Closed Period	In this option, you filter all transactions that have a transaction date on or before the end date of the last closed period.
Transaction Date <= Current Period End Date	In this option, you filter all transactions that have a transaction date on or before the end date of the current period.
Transaction Date Between	In this option, you filter all transactions that have a transaction date between the start date and the end date that you specify.

Table 24.6: Historical Transactions Filter Options

Normal Transactions Filter Options	Explanation
No Filter	This is the default option, which specifies no transaction filter.
Transaction Date <= Period Ending	In this option, you filter all historical corrections for transactions that have a transaction date on or before a period ending date that you specify.
Transaction Date <= End Date of Last Closed Period	In this option, you filter all historical corrections for transactions that have a transaction date on or before the end date of the last closed period.
Transaction Date <= Current Period End Date	In this option, you filter all historical corrections for transactions that have a transaction date on or before the end date of the current period.
Transaction Date Between	In this option, you filter all historical corrections for transactions that have a transaction date between the start date and the end date that you specify.
Transaction Datetime Stamp <= Period Ending	In this option, you filter all historical corrections that occurrend on or before a period ending date that you specify.
Transaction Datetime Stamp <= End Date of Last Closed Period	In this option, you filter all historical corrections that occurred (have a datetime stamp) on or before the end date of the last closed period.
Transaction Datetime Stamp <= Current Period End Date	In this option, you filter all historical corrections that occurred (have a datetime stamp) on or before the end date of the current period.
Transaction Datetime Stamp Between	In this option, you filter all historical corrections that occurred (have a datetime stamp) between the start date and the end date that you specify.

Objective 9: Specify the output type

For each output destination, users must specify the output type as either “Database” or “File.” Depending on your choice of output type, this information will become part of either a database output target profile or a file output target profile that you can re-use for later exports.

Output destinations are called “export targets.” You have already assigned values to the export targets in the Code Values area of TimeWizard. We discussed this process in Chapter 4, Objective 5, in the section titled, “Customizing TimeWizard.”

Specifying the output type

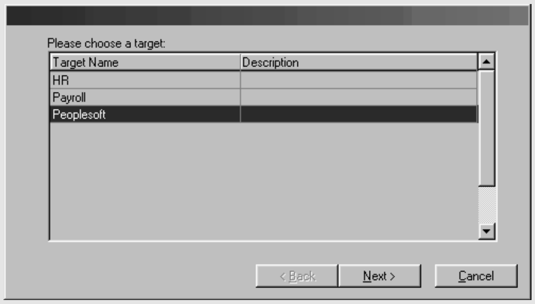


Figure 24.23

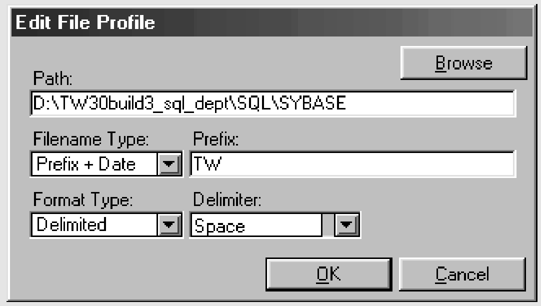


Figure 24.24

To specify the output type, follow these steps:

1. In the Script Editor window, click the Output tab.
2. Right-click in the empty area of the Variable section of the Output tab window to display the variable pop-up menu.
3. Select Add to open the output target dialog box.
4. Select an export target from the list. (See Figure 24.23.) Click Next to continue.

   One DataBridge script may be used with multiple export targets.

5. Select either "Database" or "File" as the output type. (See Figure 24.24.) If you chose "Database," leave the "Include Header" checkbox unselected. If you chose "File," you can select "Include Header" if you want to include header text for each variable in the output file. Click Next to continue or Back to return to the previous dialog box.

If you chose "Database" as the output type, continue with Objective 10: Script a database output target profile. If you chose "File" as the output type, continue with Objective 11: Script a file output target profile.

Objective 10: Script a database output target profile

An output target profile consists of an export target, an output type, and information on how to connect to the export target. If your output type is "Database," in this objective you learn to complete a database output target profile by providing connectivity information.

Scripting a database output target profile

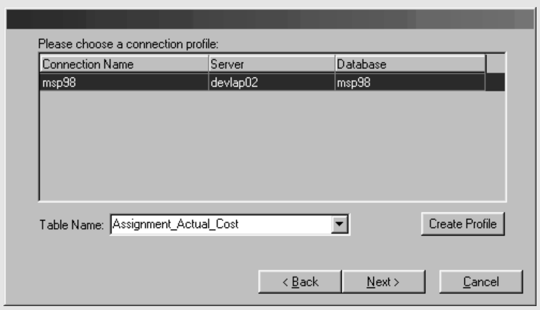


Figure 24.25

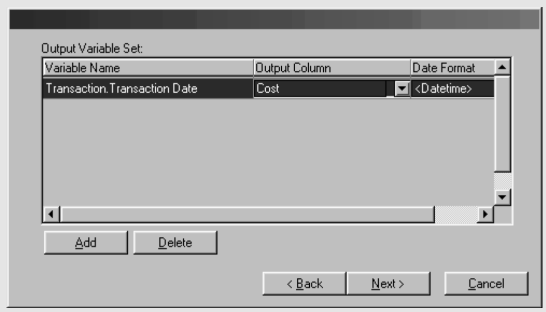


Figure 24.26

To script a database output target, follow these steps:

1. Complete the steps in Objective 9 by selecting "Database" as the output type and clicking Next.
2. Select a database connection profile from the list or click the Create Profile command button to create a new profile. (For information on creating a database profile, see Objective 8 in the Introduction to this section.)
3. Select the appropriate output table name from the Table Name drop-down box. (See Figure 24.25.) Click Next to continue or Back to return to the previous dialog box.
4. In the Output Variable Set dialog box, click the Add command button to open the Choose Variable dialog box. Select one or more output variables from the list. Click Choose to return to the Output Variable Set dialog box.

To select multiple variables in sequence, click on the top variable you want to select. Then hold down the Shift key and click on the bottom variable you want to select. To select multiple variables not in sequence, click on the top variable you want to select. Then hold down the Control key and click on each additional variable you want to select.

5. Enter the appropriate settings in the Output Column and Date Format drop-down boxes, if applicable. (See Figure 24.26.) Click Next to continue or Back to return to the previous dialog box.

To change the sequence of the output variables, click on the variable name of a row you want to move and the cursor will become a double-headed arrow. Continue to depress the mouse button and drag-and-drop the variable row to the desired location in the list.

6. Verify your variable settings before creating the variable. Click Finish to create the variable or Back to return to the previous dialog box and make corrections.

Objective 11: Script a file output target profile

An output target profile consists of an export target, an output type, and information on how to connect to the export target. If your output type is "File," in this objective you learn to complete a file output target profile by providing connectivity information.

Scripting a file output target profile

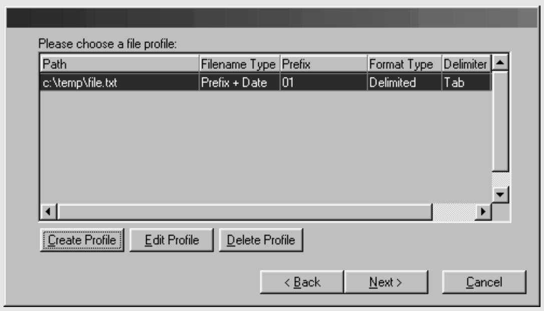


Figure 24.27

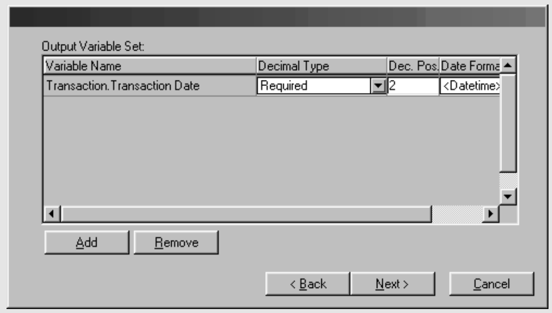


Figure 24.28

To script a file output target profile, follow these steps:

1. Complete the steps in Objective 9 by selecting "File" as the output type and clicking Next.
2. Select a file profile from the list or click the Create Profile command button to create a new profile. (See Figure 24.27.) For instructions on how to create a new file profile or edit an existing file profile, see Objectives 15 and 16 in this chapter. Click Next to continue or Back to return to the previous dialog box.
3. In the Output Variable Set dialog box, click the Add command button to open the Choose Variable dialog box. Select one or more output variables from the list. Click Choose to return to the Output Variable Set dialog box.

   TIP: To select multiple variables in sequence, click on the top variable you want to select. Then hold down the Shift key and click on the bottom variable you want to select. To select multiple variables not in sequence, click on the top variable you want to select. Then hold down the Control key and click on each additional variable you want to select.
4. Enter the appropriate settings for the output variable set. (See Figure 24.28.) Table 24.7 explains each setting. Click Next to continue or Back to return to the previous dialog box.

   TIP: To change the sequence of the output variables, click on the variable name of a row you want to move and the cursor will become a double-headed arrow. Continue to depress the mouse button and drag-and-drop the variable row to the desired location in the list.
5. The last setup dialog box displays all prior selections. Review your settings before creating the output variable. Click Finish to create the variable or Back to return to the previous dialog box and make corrections.

Table 24.7: Output Variable Set Options

Output Variable Set Settings	Explanation
Variable Name	The user-selected name of the variable.
Decimal Type	Your options are as follows: not applicable, required with fixed positions, required with floating position, implied with fixed position, optional with floating position.
Decimal Position	Specify the placement of the decimal.
Date Format	If applicable, select a date format from the drop-down menu.
Header Text	If you selected "Include Header," enter user-specified header text for each output variable.

Objective 12: Edit a database output target profile

TimeWizard enables you to edit and maintain your output target profiles so that you can ensure ease of connectivity to your export targets.

Editing database output target profiles

To edit output target profiles, follow these steps:

1. In the Script Editor window, click the Output tab.
2. Right-click on the output target that you want to clone to display the drop-down menu.
3. Select Edit to open the Output dialog boxes. Make any necessary changes.
4. The last setup dialog box displays all prior selections. Review your settings before creating the output target. Click Finish to create the variable or Back to return to the previous dialog box and make corrections.

Objective 13: Clone a database output target profile

In the event you need to add a database profile that is very similar to an existing profile, TimeWizard enables you to make an exact copy of the existing profile and then edit the copy as needed. This saves time and helps to ensure accurate output target setup.

Cloning database output target profiles

To clone output target profiles, follow these steps:

1. In the Script Editor window, click the Output tab.
2. Click the Create Profile command button to open the New File Profile dialog box.

   NOTE: The Create Profile command button is located wherever you are required to select a file profile for Table Retrieval, DataBridge, and ProjectLink interfaces.

3. Enter the appropriate setup information in the data fields. Table 24.9 explains each file profile setup selection.
4. Click Done to save the settings and exit the New File Profile dialog box.

Objective 14: Delete a database output target profile

TimeWizard enables you to delete output target profiles that you no longer require.

Deleting database output target profiles

To delete output target profiles, follow these steps:

1. In the Script Editor window, click the Output tab.
2. Right-click on the output target that you want to delete to display the drop-down menu.
3. Select Delete to open the Delete confirmation dialog box.
4. Click Yes to delete the output target profile.

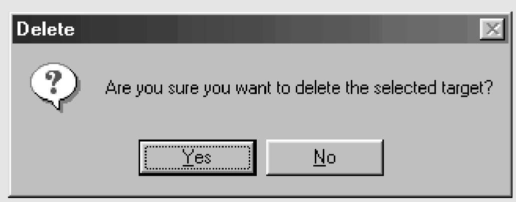


Figure 24.29

Objective 15: Create a file profile

If your output type is File, you can create file profiles for export targets and have the flexibility to re-use file interfaces—without the hassle of having to reconfigure the connection each time.

Creating file profiles

To create file profiles, follow these steps:

1. Click the Create Profile command button to open the New File Profile dialog box.

   The Create Profile command button is located wherever you are required to select a file profile for Table Retrieval, DataBridge, and ProjectLink interfaces.

2. Enter the appropriate setup information in the data fields. Table 24.8 explains each file profile setup selection.
3. Click Done to save the settings and exit the New File

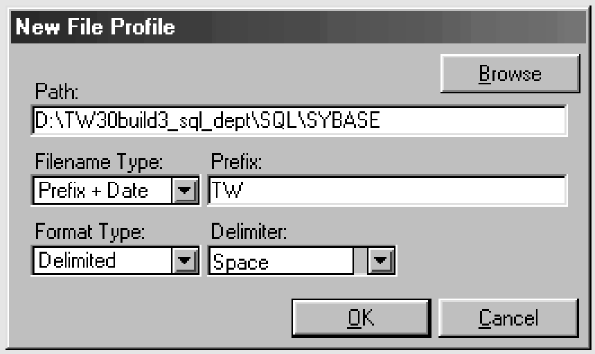


Figure 24.30

Table 24.8: File Profile Settings

File Profile Settings	Explanation
Path	Specify the location of the file output target. Click the Browse command button to identify the path.
Filename Type	Your options are as follows: Prefix + Date, User Specified. An example of Prefix + Date is "Payrol + 1999."
Prefix	If the Filename Type is "Prefix + date," specify the filename prefix in the Prefix text input box.
Filename	If the Filename Type is "User Specified," enter the filename in the Filename text input box that will display in place of the Prefix box.
Format Type	Your options are as follows: Delimited, CSV, Fixed Format, Line Format.
Delimiter	If the format type is Delimited, your options are as follows: Tab, Space, Comma, Dash.

NOTE The Format Type “Line Format” will output one value per line.

Objective 16: Edit a file profile

TimeWizard enables you to edit and maintain your file profiles so that you can ensure ease of connectivity to your export targets.

Editing file profiles

To edit file profiles, follow these steps:

1. Click on a file profile to select it.
2. Click the Edit Profile command button to open the Edit File Profile dialog box for the selected profile.
3. Edit the appropriate setup information in the data fields. See Table 21.9 for explanations on the file profile setup selections.
4. Click Done to save the settings and exit the Edit File Profile dialog box.

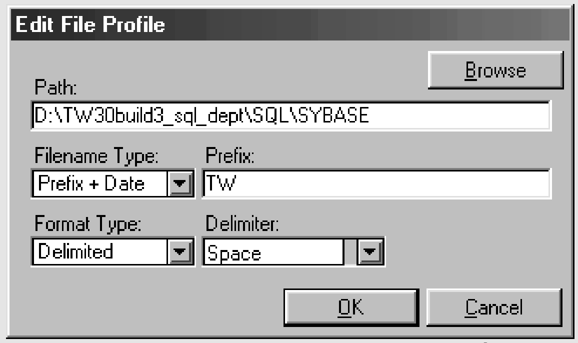


Figure 24.31

Objective 17: Delete a file profile

TimeWizard enables you to delete file profiles that you no longer require.

Deleting file profiles

To delete file profiles, follow these steps:

1. Click on a file profile to select it.
2. Click the Delete Profile command button delete the selected profile.

Objective 18: Write your own script in SQL

If you are experienced in writing SQL scripts and are familiar with the TimeWizard database, you can write your own DataBridge script to output TimeWizard data to a flat file.

NOTE

Writing "select" statements in your script is the safest policy. Data manipulation statements such as "create," "insert," "update," and "delete" statements could irrevocably damage your TimeWizard database.

Writing your own script in SQL

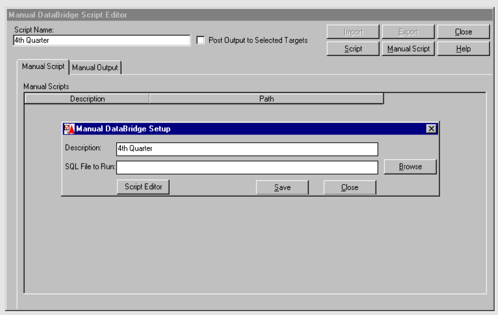


Figure 25.32

To write your own script, follow these steps:

1. In the Interface Controller window, add a new DataBridge interface.
2. Select Interface > Setup Options or click the Setup Options icon or double-click the DataBridge application name cell to open the DataBridge Script Editor window.
3. Click the Manual Script button to open the Manual DataBridge Script Editor window.
4. In the Manual Script tab page, right-click in the empty Manual Scripts area and select "Add" from the popup menu to open the Manual databridge setup dialog box.
5. Enter a description for your script.
6. To write a completely new script, click "Script editor" to open the Manual databridge setup dialog box. To write a script based on an existing script, click "Browse" and select the file to modify.
7. Write your SQLscript in the text box, including statements to select and filter the data and to perform any calculations needed for the output.

   If you plan to post the output data (i.e., flag the database records that are sent to a specific target), you must select trans_id from the transactions table.
8. Click "Compile" to test whether the script could be executed as written. If an error message displays, make any required corrections. If no message displays, continue with step 9 below.
9. Click "Save" to open the Select File dialog box. Enter a unique file name, click the "Save in" drop-down box to select where to save the SQL file, and click "Save."
9. Enter a unique script name. To open the non-manual Script Editor, click "Script," or to close the window and return to the Interface Controller, click "Close."
10. Continue with the steps on the next page.

Setting up the output for your manual script

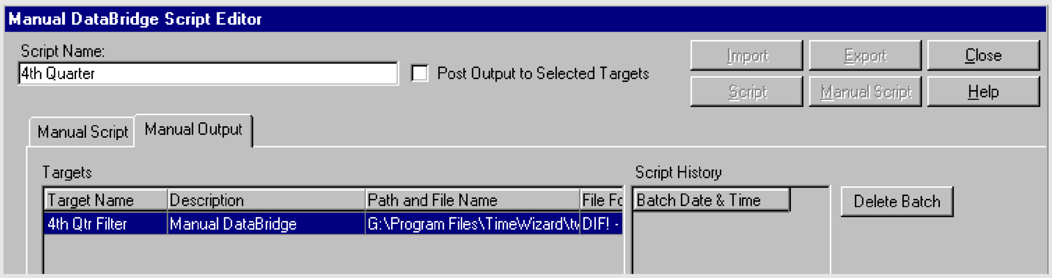


Figure 25.33

To set up the output for a manual script, follow these steps:

1. In the Code Values area (Tools > Code Values), click the DataBridge Targets tab to open the DataBridge Targets tab page.
2. Click "Add" and enter a target name for the export destination. Enter a description with the first word "Manual,."
3. Repeat step 2 to add multiple targets. Click "OK' to save the target(s) and close the window.
4. In the Interface Controller, select the DataBridge application to be used. Select Interface > Setup Options or click the Setup Options icon or double-click the DataBridge application name cell to open the DataBridge Script Editor window.
5. Click "Manual Script" to open the Manual DataBridge Script Editor window.
6. Click the Manual Output tab. Right-click in the empty area to open the Create/Edit Manual Output box. Click "Next."
7. Select whether the output file is to include a header for each variable in the script and click "Next."
8. Click "Browse." To retain the name of the file you want to use, select the file. To change the name of the file, select the path, and enter a new name in the File name box.
9. Click the Format Type drop-down box and select a format for the output. Click "Finish." The Manual Output page displays the target name, the description from Code Values, the path and file name, and the file format.

NOTE

To retain more than one manual script, add another DataBridge interface in the Interface Controller window. In the Manual databridge setup window, enter a new, unique script name and write the script.

Manual script output formats

You can select any of the following file types for the output:

- Comma-separated values
- Data Interchange format
- Microsoft Excel format
- Microsoft Excel 5 format
- Text with HTML formatting
- Powersoft Report (PSR) format
- SQL syntax
- Microsoft Multiplan format
- Tab-separated columns
- Lotus 1-2-3 format
- Windows Metafile format

Objective 19: Edit, clone, or delete a manual script

Editing, cloning, or deleting a manual script

To edit, clone, or delete a manual script, follow these steps:

1. To edit a script, select the interface row and open the DataBridge Script Editor. In the Manual Script tab page, right-click and select "Edit" from the popup menu. After editing and compiling, click "Save" and select where to save the SQL file. You can edit the Manual Output settings in the same manner.
2. To clone a script (i.e., to duplicate a script to be the base of a new script), select the interface row, select Interface > Clone Interface or right-click the row and select "Clone Interface." Open the DataBridge Script Editor and edit the default script name, cloned script, and cloned output settings as desired (see step 1).
3. To delete a script but retain the output settings, right-click the script row or empty area in the Manual Script tab page. Select "Delete" from the menu.
4. To delete output settings but retain the script, right-click on the output target row in the Manual Output tab page. Select "Delete" from the menu.

Summary

In this chapter, you have learned how to write DataBridge scripts that enable you to gather specified data in TimeWizard and deliver and post it to targeted external systems.

C H A P T E R 28

Working with the Table Retrieval

TimeWizard provides the capability for you to create automated links to other systems within your organization—such as Payroll, Accounting, Human Resources, etc.—allowing a one-way transfer of data from your selected system into TimeWizard. The Table Retrieval is a sophisticated import tool that requires some understanding of the data captured within TimeWizard, time-accounting interfaces, and relational databases. You may need to experiment with this function and seek technical assistance to achieve the desired results.

In a Table Retrieval, you can choose to import into one or more tables. For example, when importing employees, you would first want to import any departments, employee codes, salary codes, and resource codes associated with them. You could combine all of these into a single retrieval.

Objectives

1. Create a Table Retrieval
2. Set up a Table Retrieval
3. Add a Map Table
4. Identify the Data Source for a Flat File
5. Identify the Data Source for a DBMS
6. Designate the Employee ID (for an Employee MAP Table)
7. Map the Data
8. Map the Data (for an Employee MAP Table)
9. Preview the Table Retieval
10. Change the Employee ID (for an Employee MAP Table)

Objective 1: Create a Table Retrieval

Creating a Table Retrieval

To create a Table Retrieval, follow either of these steps:

1. From the Interface Controller window, click the Add Interface icon.

2. Select "Table Retrieval" from the Interface Type data window. To locate the selection, scroll through the drop-down menu.

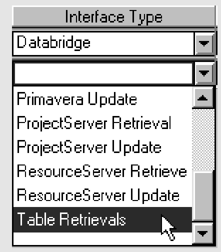


Figure 28.1

Objective 2: Set up a Table Retrieval

The first step in creating a Table Retrieval is to name the retrieval set you are about to map.

Setting up a table retrieval

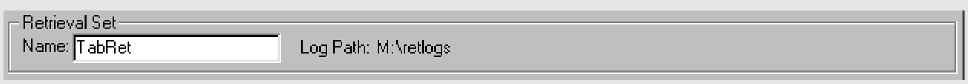


Figure 28.2

To set up a Table Retrieval, follow these steps:

1. Click on the Setup icon or double-click on the interface type cell to open the Table Retrieve dialog box. 
2. Enter a name for the retrieval set in the "Retrieval Set Name" data window.
3. TimeWizard automatically specifies the log path.

Objective 3: Add a Map Table

Each Map Table is a table in the TimeWizard database into which you want to import data. In addition to the TimeWizard standard selections—Employees, Activities, Employee Codes, Department Codes, and Salary Codes— you may add map tables for user-defined activity keys and detail codes.

Adding a map table

To add a map table, follow these steps:

1. In the Table Retrieve dialog box, click the "Add Table" command button to add a map table.
2. Click on the Map Table data window to select a map table. To locate the selection, scroll through the drop-down menu.

Figure 28.3

Objective 4: Identify the Data Source for a Flat File

For each Map Table, you must identify the data source and data mapping parameters. The data source can be either a flat file or a DBMS.

Identifying the Data Source for a Flat File

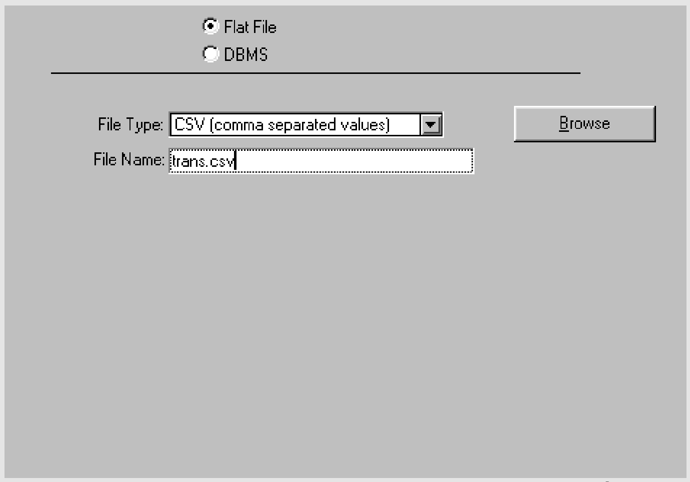


Figure 28.4

To identify the Data Source for a Flat File, follow these steps:

1. Click on the "File Type" data window to select either TAB (Tab Delimited) or CSV (Comma Separated Values) as the file type. To locate the selection, scroll through the drop-down menu.

   NOTE: The source file cannot have more than 30 tab delimited columns.

2. Type the appropriate file name in the File Name data window or click on the Browse command button to locate the file.
3. Click Apply to save the settings and remain in the Data Source window.

Objective 5: Identify the Data Source for a DBMS

NOTE: If you click on the external data column, TimeWizard retrieves a list of all tables and views in the database available for mapping.

Identify the Data Source for a DBMS

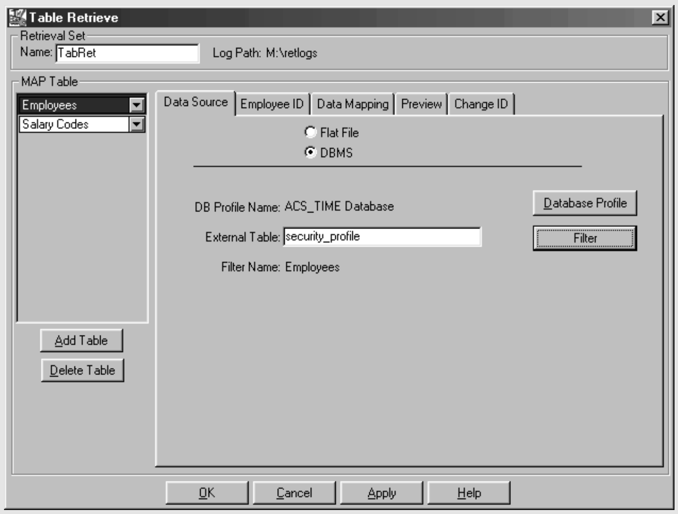


Figure 28.5

To identify the Data Source for a DBMS, follow these steps:

1. Identify the data source type as DBMS.
2. Click the Database Profile command button to open the Select Database Profile dialog box.
3. Select a database profile from the list.

   For instructions on how to create a new database profile or edit an existing database profile, see the Introduction of this section.

4. Click OK to save the setting and return to the Data Source window.
5. In the External Table data window, enter the name of the table from which you want to retrieve data.
6. Click on the Filter command button to specify a filter for the retrieval.

   For instructions on how to create a new filter or edit an existing filter, see the Introduction of this section.

7. Click Apply to save the settings and remain in the Data Source window, or click OK to save the settings and return to the Interface Controller window.

Objective 6: Designate the Employee ID (for an Employee MAP Table)

To import employee data, you must map the structure of employee names in each system and specify employee status preferences upon retrieval. In addition, you must map certain required fields.

Designating the Employee ID (for an Employee MAP Table)

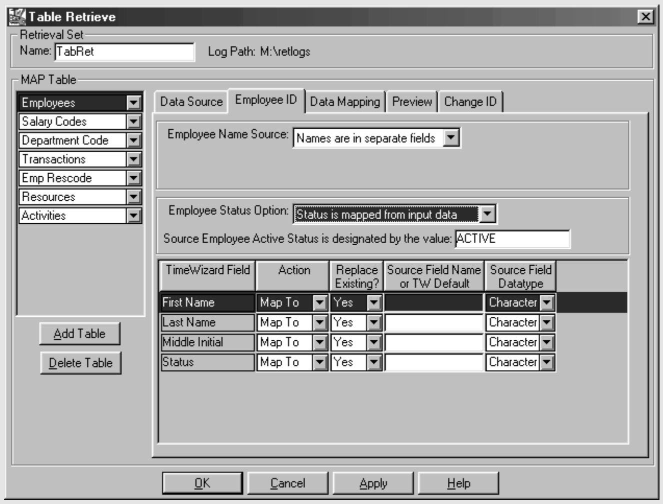


Figure 28.6

To designate the Employee ID (for an Employee MAP Table), follow these steps:

1. In the Employee ID section, click on the "Employee Name Source" data window to specify your field preference. To locate the selection, scroll through the drop-down menu. The choices are as follows:
   - "Names are in Separate Fields"
   - "Full name is in One Field"
2. If you select "Full name is in One Field," click on the "Full Name Format" drop-down windows to specify a preferred name format (e.g., Last Name, First Name, Middle Initial).
3. Click on the "Employee Status Option" data window to specify your preference. To locate the selection, scroll through the drop-down menu. Table 28.1 explains the status options.
4. If the status option is "Status is mapped from input data," click on the "Source Employee Active Status is Designated by the Value" data window to enter the value that represents an active employee. For example, "A" could designate Active, and "I" could designate Inactive.
5. To change the data in each TimeWizard field, click on the data windows to specify an action and default value.

Table 28.1: Employee Status Options

Employee Status Options	Definition
Status is mapped from input data	In this option, the status is mapped to the field (file import) or column (database import).
All imported employees are active	In this option, the status defaults to 1 (active). (Note: You still must set datamap specifications for the field or column.)
All imported employees are inactive	In this option, the status defaults to -1 (inactive). (Note: You still must set datamap specifications for the field or column.)

Objective 7: Map the Data

The TimeWizard required fields and available optional fields differ for each map table.

Mapping the Data

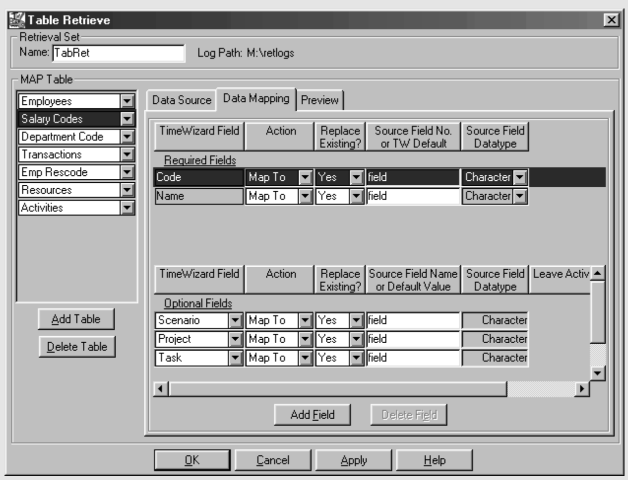


Figure 28.7

To map the data, follow these steps:

1. In the Data Mapping section, click the Add Field command button.
2. Select the appropriate parameters from the drop-down boxes. Table 28.2 explains the parameter columns.
3. To delete a datamap field, select the appropriate field and click the Delete command button.
4. Click Apply to save the settings and remain in the Data Mapping section, or click OK to save the settings and return to the Interface Controller window.

Table 28.2: Data Mapping Parameters

Data Mapping Parameters	Explanation
TimeWizard Field	This parameter specifies the field of information within your TimeWizard system (e.g., Priority, Department Code). If the field is ETC (Estimate to Complete), a property setting determines whether or not TimeWizard's ETC calculations will be combined with the value mapped from the external source. The default property setting does not include TimeWizard calculations to adjust the ETC. To change the property setting to include the calculations, see the ***TimeWizard Installation Guide***; you will also need to set the Replace Existing parameter to "Yes" and the Action parameter to "Map To."
Replace Existing?	This parameter specifies whether or not you want to change or update information in the selected TimeWizard field for existing records.
Action	This parameter identifies to TimeWizard whether to "Map" (i.e., transfer) the incoming data to the selected TimeWizard field or to "Default" a specific value to the selected field.
Source Field Name, Field No., or TimeWizard Default Value	This parameter identifies the incoming field name, field number, or default value. "Field number" refers to the position of the field in a tab-delimited or comma-separated text file.
Source Field Datatype	This parameter identifies the type of incoming data (i.e., character, numeric, or date). Note: For text files, all data will be considered character.

Objective 8: Map the Data for an Employee MAP Table

In the Data Mapping window for an Employee MAP Table, the TimeWizard required fields differ according to the settings in the "Employee Name Source" data field in the Employee ID window. The available optional fields do not differ.

If you selected Separate Fields, required TimeWizard fields are: Approval Level, Employee Code, Employee ID User, First Name, Last Name, Middle Initial, Salary Code, and Status.

If you selected One Field, required TimeWizard fields are: Approval Level, Employee Code, Employee ID User, Salary Code, and Status. (See Section 4: Managing Resources.)

For either selection, the optional TimeWizard fields are: Department Owner, Domain Name, Email Login ID, Email Type, Employee Status, Employee ID, Manager, Network Login ID, Password, SSN, and Leave Balance #1-15.

Mapping the Data for an Employee MAP Table

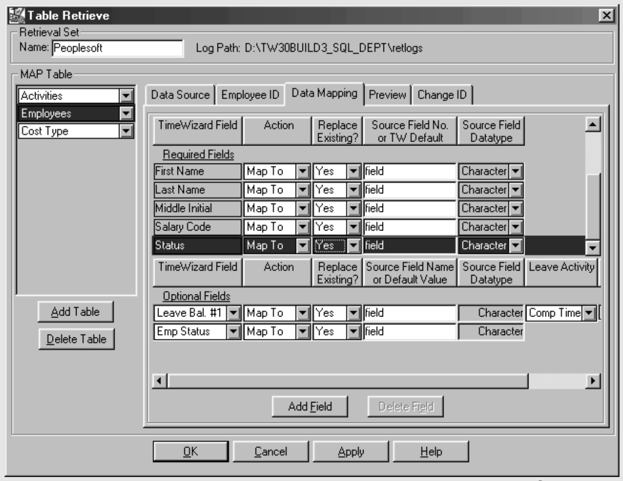


Figure 28.8

To map the data for an Employee MAP Table, follow these steps:

1. In the Data Mapping window, select the appropriate required field parameters from the drop-down boxes. Table 28.3 explains the employee data mapping parameter selections.
2. Click the Add Field command button to add optional fields.
3. To delete a datamap field, select the appropriate field and click the Delete command button.
4. Click Apply to save the settings and remain in the Data Mapping window, or click OK to save the settings and return to the Interface Controller window.

Table 28.3: Employee Data Mapping Parameters

Data Mapping Parameters	Explanation
TimeWizard Field	This parameter specifies the field of information within your TimeWizard system (e.g., Employee Code, Department Code).
Replace Existing?	This parameter specifies whether or not you want to change or update information in the selected TimeWizard field for existing records.
Action	This parameter specifies to TimeWizard whether to "Map" (i.e., transfer) the incoming data to the selected TimeWizard field or to "Default" a specific value to the selected field.
Source Field Name or TimeWizard Default Value	This parameter identifies the incoming field name or default value.
Source Field Datatype	This parameter identifies the type of incoming data (i.e., character, numeric, or date).
Leave Activity	This parameter is used strictly by the Employees table for Leave Balance mappings (e.g., which activity in TimeWizard is mapped to "vacation" in the external system) when the selection in the TimeWizard Field box is a Leave Balance. Note: First, you must create the overhead leave type of activity, resource assignments, and employee assignments. Then TimeWizard can map the leave balances into the BAL field in the employee's assignment record. By default, the Leave Balance drop-down list displays values from the activity Description field. To change a property setting so that the list displays values from the first activity field instead, see the ***TimeWizard Installation Guide.***
Leave Resource	This parameter specifies the resource code (<unclassified> or a user-defined resource code, such as Admin, Mgr, or SysEngr) that should be used when creating Leave Assignments.

Objective 9: Preview the Table Retrieval

If you are retrieving data from a database, TimeWizard enables you to preview your Table Retrieval settings.

NOTE: To use the preview function, the Map Table data source should be DBMS.

TIP: If you preview before mapping the data, you will see all fields available in the table. You may choose to use this function as a tool when initially building a Table Retrieval to see what is in the fields you want to retrieve.

Preview the Table Retrieval

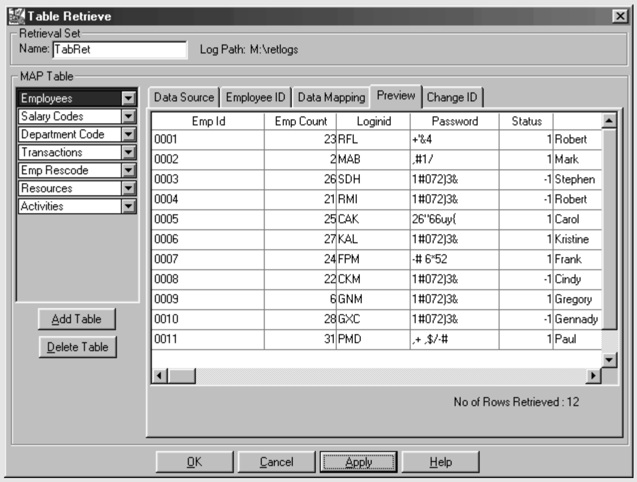


Figure 28.9

To preview the Table Retieval, follow these steps:

1. Verify that all of your Map Table settings are correct.
2. Click the Preview tab to preview your Table Retrieval settings.
3. Click OK to return to the Interface Controller window.

Objective 10: Change the Employee ID Field (for an Employee MAP Table)

There are times when the need arises to change employee IDs in TimeWizard. For example, your company moves to a new Human Resources system or a group of contract employees are hired as permanent employees. To accomodate this need, the Change ID window enables you to change a TimeWizard employee ID from an outside application update.

NOTE: This function is not for changing employee IDs one at a time. Rather it enables you to change an employee ID field for group alterations. If there is no change, then the values for both old ID and new ID can be the same.

Changing the Employee ID Field

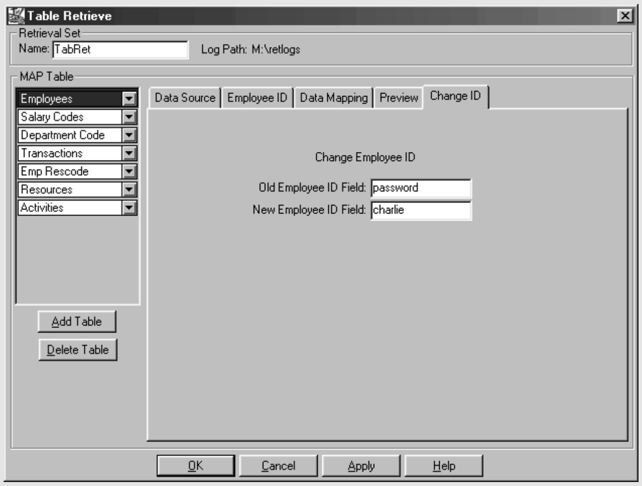


Figure 28.10

To change the Employee ID Field, follow these steps:

1. In the Change Employee ID window, enter the old employee ID field number or column in the Old Employee ID text box.
2. Enter the new employee ID field number or column in the New Employee ID text box.
3. Click Apply to save the settings and remain in the Change ID window, or click OK to save the settings and return to the Interface Controller window.

Summary

In this chapter, you have learned how to create automated links to other systems within your organization—such as Payroll, Accounting, Human Resources, etc.—allowing a one-way transfer of data from your selected system into TimeWizard.

CHAPTER 29

Working with Custom Applications

In the event you require a unique interface between TimeWizard and another application, TimeWizard enables you to set up the execution of an interface of your own design.

NOTE

The custom application ".exe" must reside on the application server in the TimeWizard directory. For information about the TimeWizard application server, see Objective 2 in the Introduction to this section.

Objectives

1. Set up a Custom Application

Objective 1: Set up a Custom Application

Setting up a custom application

To set up a custom application, follow these steps:

1. Click the Add Interface icon (Interface > Add Interface) to add a new interface field.
2. Select Custom Application from the Interface Type drop-down menu. (See Figure 26.1.)
3. Click on the setup icon or double-click on the interface type cell to open the "Enter Application Name" dialog box. (See Figure 26.2.)
4. Type in the name of the custom application and click on OK.
5. Once you have completed the setup procedures, click the Execute Now icon (Interface > Execute Now) to run the interface. You also can set up interface intervals for scheduled execution. For information about the TimeWizard interface intervals, see Objective 6: Set up the Interface Interval, in the Introduction to this section.

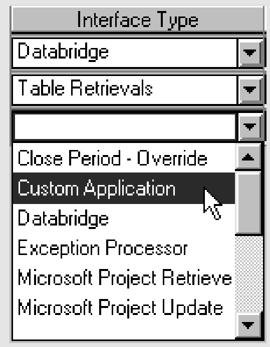


Figure 26.1

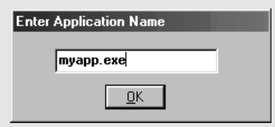


Figure 26.2

Summary

In this chapter you have learned how to set up an interface of your own design in the TimeWizard system.

CHAPTER 30

Working with AutoPopulate

TimeWizard AutoPopulate enables you to have time entered automatically on employees' timesheets. You may want to automatically populate timesheets of employees who usually work the same amount of time on standard assignments.

For example, your accounts payable staff may work eight hours a day, Mondays through Thursdays, on the assignment "Accounts Payable" and eight hours a day on Fridays on the assignment "Payroll." Employees can still enter and edit time when an exception occurs in their routine.

Objectives

1. Set a Timesheet Template through the Timesheet
2. Set up the AutoPopulate process in the Interface Controller
3. Execute the AutoPopulate process

Objective 1: Set a Timesheet Template through the Timesheet

A timesheet template is a model of the time and employee assignments for one employee, in one period, that TimeWizard can use to automatically populate that employee's timesheet in other periods. Employees who are designated as AutoPopulate users (Employees > Employee Detail window) can make templates of their timesheets for use in the AutoPopulate process. Department owners can also set templates in the timesheets of AutoPopulate users in their departments.

Setting a Timesheet Template

To set a Timesheet Template, follow these steps:

1. In the Timesheet of the employee, select a period that has the time entries for the assignments you want to include in the template. Do not select a period that includes any time entries you do not want in the template. The period may include assignments without time transactions.

NOTE: All of the assignments with time entries in the period must be open assignments.

2. From the Timesheet menu, select Set Template. When the template has been set from the period's timesheet, a checkmark will display to the left of the Set Template menu item.

NOTE: An employee may have only one timesheet template at a time.

3. To select a different period for a timesheet template, first select the desired period. Then select Set Template from the Timesheet menu. A checkmark will display by the menu item of the new period's timesheet. A checkmark will no longer display by the menu item of the previously used period.

NOTE: You can also deselect a template by clicking on the Timesheet > Set Template menu item that displays a checkmark.

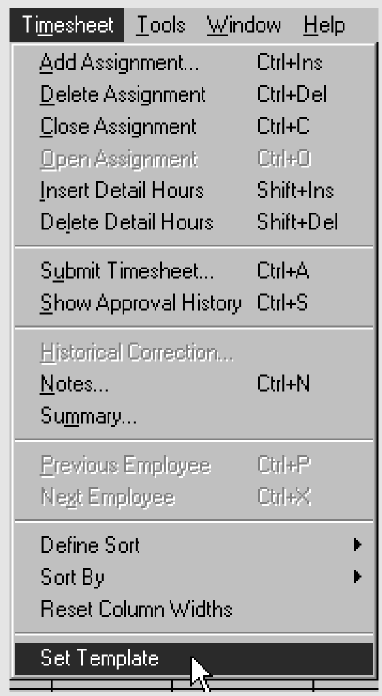


Figure 27.1

Objective 2: Set up the AutoPopulate process in the Interface Controller

To continue setting up AutoPopulate, you will first add the AutoPopulate Interface in the Interface Controller window. You can then run the AutoPopulate process for the current period or you can set up an interface interval to have the process run at regularly-scheduled times.

NOTE AutoPopulate only populates timesheets in the current period. However, AutoPopulate can be scheduled to run automatically once every period by setting up the appropriate interval in the Interface Controller.

Adding the AutoPopulate Interface type

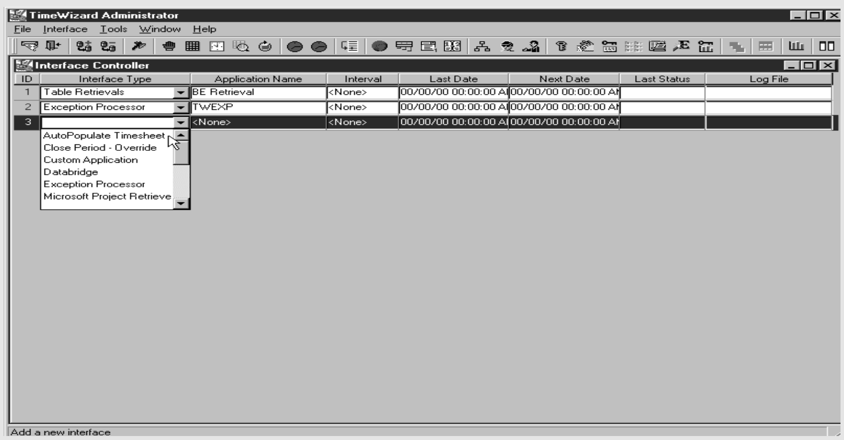


Figure 27.2

To add the AutoPopulate Interface type, follow these steps:

1. In the Interface Controller window, click the Add Interface icon or select Interface > Add Interface from the menu.
2. In the new interface row, select AutoPopulate from the Interface Type drop-down menu.

TIP If you choose to have AutoPopulate run automatically at scheduled intervals, follow the steps in the introduction to this section in Objective 6: Set up the Interface Interval.

Objective 3: Execute the AutoPopulate process

Each time AutoPopulate runs, TimeWizard checks whether employees, assignments, and the current period meet specific AutoPopulate criteria. Some employees' timesheets, which met the criteria when the templates were set, may not meet all the criteria at the time when AutoPopulate is run. When the AutoPopulate process finishes, a log file is generated that lists the employees whose timesheets were populated and any cases of employees with timesheet templates who did not meet the other validation criteria.

For all active employees with timesheet templates, AutoPopulate checks adherence to the following criteria:

1. The current period is open.
2. The current timesheet has no previously entered time transactions.
3. All time entries on the template are associated with assignments included on the current timesheet.
4. The assignments in criterion 3 above are currently open.
5. The employee is authorized to use activities associated with the assignments in criterion 3, in accordance with current Access Lists defined in the TimeWizard business rules.

To execute AutoPopulate for the current period only, follow the steps in the introduction to this section for Objective 4: Execute TimeWizard Interfaces. To have AutoPopulate execute at scheduled intervals you have set, click on the Start Scheduler icon or select Interface > Start Scheduler from the main menu.

To see the log file to learn what errors may have occurred, follow the steps in the introduction to this section for Objective 5: Browse Interface Log Files.

Summary

In this chapter, you have learned how to use AutoPopulate to automatically populate timesheets with time transactions.

CHAPTER 31

Working with the Close Period Override Utility

Using the Close Period utility in the Interface Controller window, you can schedule the closing of approval periods in your TimeWizard system. In addition, you can sequence the execution of the Close Period utility so that it runs just prior to other interfaces.

NOTE: When the Close Period utility executes, it closes the last unclosed period—even if timesheets in the period have missing approvals.

Objectives

1. Define a Close Period override

Objective 1: Define a Close Period override

Defining a close period override

To define a close period override interface type, follow these steps:

1. Click the Add Interface icon (Interface > Add Interface) to add a new interface field.
2. Select Close Period-Override from the Interface Type drop-down menu.
3. Setup interface intervals for scheduled execution of this interface. See the Introduction to this section, Objective 6: Setup the Interface Interval.
4. Click the Execute Now icon (Interface > Execute Now) to run the interface.

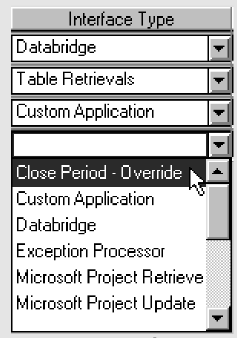


Figure 28.1

Summary

In this chapter you have learned how to close the last unclosed period even if timesheets in the period have missing approvals.

CHAPTER 32

Working with the Exception Processor

The TimeWizard Exception Processor allows you to specify circumstances under which you want to have exception messages or email notification (specifying such conditions as missing timesheet submittals, missing approvals, or rejected timesheets) sent to specified individuals within your company.

NOTE

You can set up multiple exception interfaces, and each exception interface can have its own set of mail to, filter, and date specifications.

Exception data is written to an interface log file, regardless of whether TimeWizard is connected to a mail system. To set up the mail link to send exception e-mail messages, refer to the TimeWizard Implementation Guide.

Objectives

1. Add a standard exception to the Interface Controller window
2. Set up a standard exception
3. Create a custom exception
4. Edit standard or custom exception text
5. Delete a custom exception

Objective 1: Add a standard exception to the Interface Controller window

The first step is to select a standard exception interface type in the Interface Controller window.

Adding a standard exception

To add a standard exception, follow these steps:

1. Click the Add Interface icon (Interface > Add Interface) to add a new interface field.
2. Select Exception Processor from the Interface Type drop-down menu.

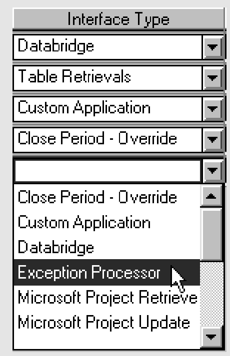


Figure 29.1

Objective 2: Set up a standard exception

The standard exception setup process enables you to filter the exceptions and specify who receives the email notifications.

To have the exception data simply write to the interface log file, without connecting to an email system, do not select any recipients in the "Mail Exception Logs To" area. (See Figure 29.2.)

Setting up a standard exception ***(continued on page 343)***

To set up a standard exception, follow these steps:

1. In the Interface Controller window, select the exception processor from the Interface Type column.
2. Click on the setup icon or double-click on the interface type cell to open the "Exception Processor Options" dialog box.
3. In the Exception Processor Name data field, enter a name for the exception interface.
4. Click the Standard tab.
5. Click on the boxes to select or deselect (turn on or off) the standard exceptions. (Table 29.1 describes each selection.)

Setting up a standard exception ***(continued from page 342)***

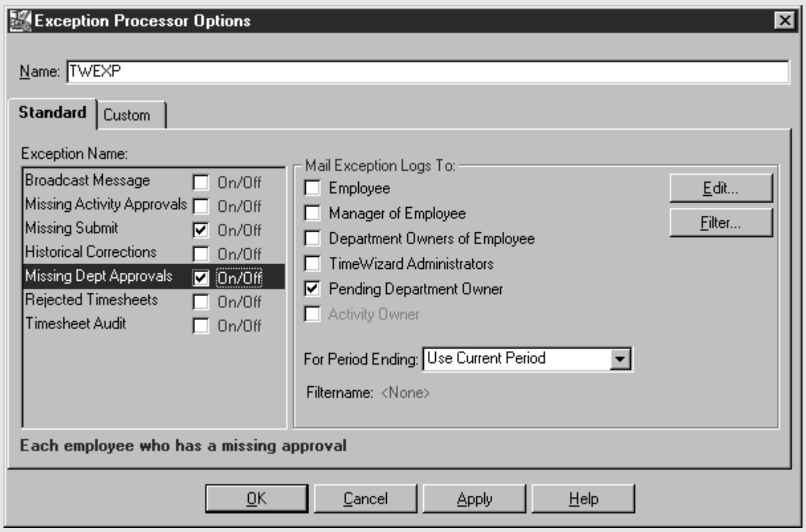


Figure 29.2

6. The exception data is written to an interface log file directory named “exlogs” regardless of whether you send exception logs by email. To send exception email messages, select the recipients in the “Mail Exception Logs To” area from the following:

- Employee
- Manager of Employee
- Department Owners of Employee
- TimeWizard Administrators
- Pending Department Owner
- Activity Owners

Your choices of exceptions will affect the availablity of recipients (e.g., if you pick “Missing Dept Approvals,” then “Activity Owner” will be unavailable).

NOTE: To send mail to the TimeWizard Administrator, a fully-qualified Internet mail account must be set up for the user, “TWADMIN.” The same password used to access the TimeWizard Administrator application with the Login ID, “TWADMIN,” must be assigned to this email account.

7. Click on the “For Period Ending” drop-down box to specify the period for which you want to report the exceptional data. The list includes:

- Use Current Period
- Use Last Closed Period
- Period Ending Date = (in which case you must specify the period ending date)

NOTE: You will still need to set up an interface interval if you want to schedule when the Exception Processor will run. (See Objective 6 in the Introduction to this section.)

8. Click on the Filter command button to specify a filter for the exception processor.

NOTE: For instructions on how to create a new filter or edit an existing filter, see the Introduction of this section.

9. Click Apply to save the settings and remain in the Exception Processor Options dialog box, or click OK to save the settings and exit the dialog box.

Table 29.1: Standard Exceptions

Exception Name	Description
Broadcast Message	A general broadcast message
Missing Activity Approvals	Each employee who has a missing activity approval
Missing Submit	Each employee has a missing submit
Historical Corrections	Each employee whose timesheet data was modified in a closed period
Missing Dept Approvals	Each employee who has a missing department approval
Rejected Timesheets	Each employee who has a rejected timesheet
Timesheet Audit	Each employee whose timesheet data was modified by someone else in an open period

TIP

If you want to send different exception messages at different times, you can set up multiple Exception Processor interfaces in the Interface Controller, instead of editing the exception message. You can also set up multiple Exception Processor interfaces if you want to send the same exception message to different recipients at different times.

Objective 3: Create a custom exception

In addition to the standard exceptions provided, TimeWizard enables you to create an exception of your own design.

Creating a custom exception *(continued on page 346)*

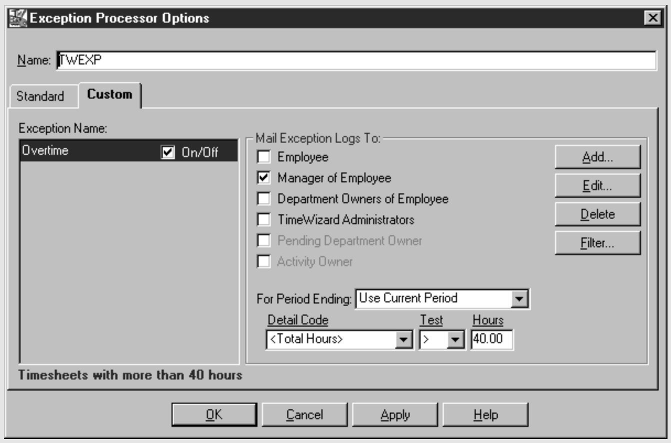


Figure 29.3

To create a custom exception, follow these steps:

1. In the Interface Controller window, select the exception processor from the Interface Type column.
2. Click on the setup icon or double-click on the interface type cell to open the “Exception Processor Options” dialog box.
3. In the Exception Processor Name data field, enter a name for the exception interface.
4. Click the Custom tab.
5. Click on the Add command button to open the “Enter Exception Name” dialog box (see Figure 29.4). Type in the name. In the Description box, type in the text you want included in the exception message. Click on OK to save your entries and close the dialog box. When the exception is highlighted in the left frame, the text will display below the frame.
6. Click on the boxes to select or deselect (turn on or off) each available custom exception.
7. In the “Mail Exception Logs To” area, select the recipients of the exception logs from the following:
   - Employee
   - Manager of Employee
   - Department Owners of Employee
   - TimeWizard Administrators
   - Pending Department Owner
   - Activity Owners

NOTE To send mail to the TimeWizard Administrator, a fully-qualified Internet mail account must be set up for the user, “TWADMIN.” The same password used to access the TimeWizard Administrator application with the Login ID, “TWADMIN,” must be assigned to this email account.

Creating a custom exception ***(continued from page 345)***

8. Click on the "For Period Ending" drop-down box to specify the period for which you want to report the exceptional data. The list includes:

- Use Current Period
- Use Last Closed Period
- Period Ending Date = (in which case you must specify the period ending date)

You still need to set up an interface interval if you want to schedule when the Exception Processor will run. (See Objective 6 in the Introduction of this section.)

9. Define the detail code test statement for each custom exception.

a. Click on the Detail Code drop-down box to select either Total Hours or other user-defined detail codes (e.g., Cost Type).

b. Click on the Test drop-down box to select the appropriate comparison operator (e.g., <, >, =).

c. Click on or tab to the Hours text box and enter the number of hours.

d. If you selected a user-defined detail code in step 9a, click on the Detail Value drop-down box to select a detail value for the detail code (e.g., for the detail code Cost Type, pick REG or OT).

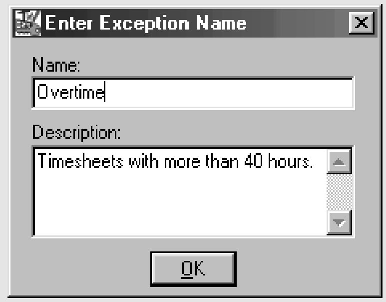


Figure 29.4

10. Click on the Filter command button to specify a filter for the exception processor.

For instructions on how to create a new filter or edit an existing filter, see the Objective 9 in the Introduction of this section.

11. Click Apply to save the settings and remain in the Exception Processor Options dialog box, or click OK to save the settings and exit the dialog box.

You may want to set up a missing submit exception interface to email employees only on Friday afternoon, a second missing submit exception interface to email to the employees' managers on Monday morning, and a third missing submit exception interface to email to department owners on Monday at noon.

Objective 4: Edit standard or custom exception text

Standard exception data displays with default text that describes the exception. You can edit standard or custom exception text or append additional text to be sent to the designated recipients.

When an exception is highlighted in the left frame, the current text for that exception displays below the frame.

Editing standard or custom exception text

To edit exception text, follow these steps:

1. Click the standard or custom tab.
2. Highlight the exception name.
3. Click on the Edit command button to open the “Edit Exception” dialog box.
4. In the “Email Message Description” text box, modify the text.
5. Click on OK to save your modifications and close the dialog box.

Figure 29.5

Objective 5: Delete a custom exception

Deleting a custom exception

To delete a custom exception, follow these steps:

1. Click the custom tab.
2. Highlight the custom exception name in the left frame.
3. Click on the Delete command button.
4. TimeWizard displays a prompt, “Are you sure you want to delete the selected Exception?” Click Yes to delete the custom exception.

Summary

In this chapter, you have learned how to specify circumstances under which you want to have exception messages (specifying such conditions as missing submittals, missing approvals, or rejected timesheets) sent via email to specified individuals within your company. Regardless of whether you connect to an email system, exception data can be written to an interface log file.

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TimeWizard

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Integrated Time Accounting Business Solutions

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CHAPTER 3

APPENDIX A

APPENDIX B

Introduction to Reporting Business Information in TimeWizard

Let Me Draw You a Picture

All of the corporate data in the world is not worth a cent if it cannot be shared so that others can understand it. That said, TimeWizard's reporting capability may be the most important feature of all. In other TimeWizard manuals, you learned how to customize TimeWizard to capture data unique to your company. You also learned how to share that data with other systems used throughout your company. In this guide, you learn how to gather all of that data into specific informational categories and produce interactive, presentation-quality reports. TimeWizard has pre-installed report categories and standard reports designed to compile the information you need to make accurate business decisions. You also have the option of customizing report categories and reports using the Crystal Report Writer 7.0 software product.

NOTE The report setup process and the selection of pre-installed reports is the same for TimeWizard and TimeWizard.*enterprise*. In the objectives in Chapter 2, follow the steps for setting parameter values for your selected report—regardless of which TimeWizard application you are using. For your convenience, an example setup screen from TimeWizard and TimeWizard.*enterprise* is provided for each report.

This guide includes the following:

Chapter 1: Identifying Pre-installed Report Categories and Reports
Chapter 2: Setting Parameter Values for Pre-installed Reports
Chapter 3: Exporting and Printing Reports

Appendix A: Pre-installed Reports Reference
Appendix B: Custom Field Formula Specifications

CHAPTER 1

Identifying Pre-installed Report Categories and Reports

TimeWizard has six pre-defined report categories and 21 pre-installed standard reports—all designed to compile the information you need to make accurate business decisions. This chapter offers administrative data on each report that will help you run and customize them for your use.

Objective

1. Identify the pre-installed report categories and reports

Objective 1: Identify the pre-installed report categories and reports

The tables in this objective present the six pre-defined report categories and 21 pre-installed standard reports. TimeWizard has supplied these report categories and reports for your convenience. However, your company is not bound by these selections. You may decide to modify existing report categories and reports, or you may decide to compose completely new reports to add to the existing selection. Table 1.1 lists the standard reports and identifies the report file names for Oracle and SQL Server. Table 1.2 lists the report categories and identifies the reports available to each category.

The Time and Attendance User categories and reports are referenced in the following tables and are discussed in the *TimeWizard Time & Attendance Suite User's Guide*.

Table 1.1: TimeWizard Standard Reports

Report	File Name: Oracle	File Name: SQL Server
Employee Profile	EmpListOra.rpt	EmpListSQL.rpt
Timesheet Audit Report	AuditOra.rpt	AuditSQL.rpt
Activity Summary	ActSumOra.rpt	ActSumSQL.rpt
Timesheet Summary	TimShtOra.rpt	TimShtSQL.rpt
Resource Assignments for Department Owners	ResAsnDOOra.rpt	ResAsnDOSQL.rpt
Resource Assignments for Activity Owners	ResAsnPMOra.rpt	ResAsnPMSQL.rpt
Expense Report	ExpOra.rpt	ExpSQL.rpt
Pie Chart for Department Owners	PieChtDOOra.rpt	PieChtDOSQL.rpt
Pie Chart for Activity Owners	PieChtPMOra.rpt	PieChtPMSQL.rpt
Bar Chart for Department Owners	BarChtDOOra.rpt	BarChtDOSQL.rpt
Bar Chart for Activity Owners	BarChtPMOra.rpt	BarChtPMSQL.rpt
Timesheet Report	TimesheetOra.rpt	TimesheetSQL.rpt
Timesheet Report for Department Owners	TimesheetDOOra.rpt	TimesheetDOSQL.rpt
Missing Timesheet	MisTimOra.rpt	MisTimSQL.rpt
Missing Approvals	MisAppTimOra.rpt	MisAppTimSQL.rpt
Timesheet Status	TimStaOra.rpt	TimStaSQL.rpt
Billing Report	BilSumOra.rpt	BilSumSQL.rpt
Resource Code Associations	ResEmpOra.rpt	ResEmpSQL.rpt
Time and Attendance Resource Assignments for Department Owners	TASResAsnDOOra.rpt	TASResAsnDOSQL.rpt
Time and Attendance Timesheet for Department Owners	TASTimesheetDOOra.rpt	TASTimesheetDOSQL.rpt
Time and Attendance Summary	TASTimShtOra.rpt	TASTimShtSQL.rpt
Time and Attendance Timesheet	TASTimesheetOra.rpt	TASTimesheetSQL.rpt

Table 1.2: TimeWizard Report Categories

Report Categories	Available Reports
Administrator	Employee Profile Activity Summary Timesheet Summary Missing Approvals Missing Timesheet Timesheet Status Resource Code Associations Timesheet Audit Report
Department Owner (Functional Manager)	Employee Profile Timesheet Summary Resource Assignments for Department Owners Expense Report Missing Timesheet Missing Approvals Pie Chart for Department Owners Bar Chart for Department Owners Timesheet Report for Department Owners Timesheet Status TAS Resource Assignments for Department Owners TAS Timesheet for Department Owners Time and Attendance Summary
Activity Owner (Project Manager)	Activity Summary Resource Assignments for Activity Owners Pie Chart for Activity Owners Bar Chart for Activity Owners
Timesheet User	Timesheet Report
Financial	Activity Summary Expense Report Billing Report Timesheet Summary Pie Chart for Department Owners Pie Chart for Activity Owners Bar Chart for Department Owners Bar Chart for Activity Owners
Time and Attendance User	TAS Timesheet

CHAPTER 2

Running TimeWizard Reports

In this chapter, you will learn how to select a report category and report, and to set the parameter values before previewing, exporting or printing the TimeWizard reports.

Objectives

1. Select a reports category and report
2. Set parameter values for a report
   - 2a. For an Employee Profile report
   - 2b. For an Activity Summary report
   - 2c. For a Timesheet Summary report
   - 2d. For a Resource Assignments for Department Owners report
   - 2e. For a Resource Assignments for Activity Owners report
   - 2f. For an Expense report
   - 2g. For a Pie Chart for Department Owners report
   - 2h. For a Pie Chart for Activity Owners report
   - 2i. For a Bar Chart for Department Owners report
   - 2j. For a Bar Chart for Activity Owners report
   - 2k. For a Timesheet report
   - 2l. For a Timesheet Report for Department Owners report
   - 2m. For a Missing Timesheet report
   - 2n. For a Missing Approvals report
   - 2o. For a Timesheet Status report
   - 2p. For a Billing report
   - 2q. For a Resource Code Associations report
   - 2r. For a Timesheet Audit Report

Objective 1: Select a report category and report

Depending on your company's needs, your Administrator has preset your access to report categories, which contain a specific group of reports. A typical report access setting for timesheet users is the Timesheet User report category.

TimeWizard includes several pre-installed report categories and reports for your company's convenience. The report listings may change if they are customized by your company.

Selecting a report category and report

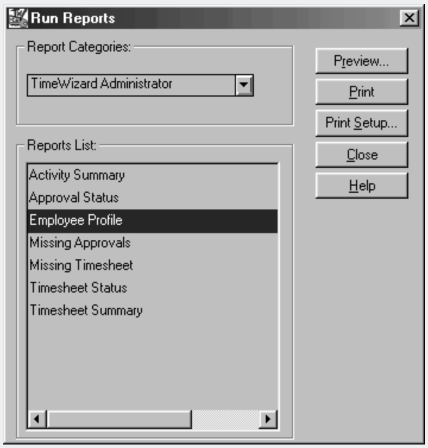


Figure 2.1A

To select a report category and report, follow these steps

1. Click the Run Reports toolbar icon  or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box. For TimeWizard.*enterprise*, click on the reports button 

 from your employee home page.
2. In the Report Categories area (Figure 2.1A), select a report category from the drop-down menu. For TimeWizard.*enterprise*, click on the reports command button to populate the reports list for the category.
3. In the Report List area, select a report.

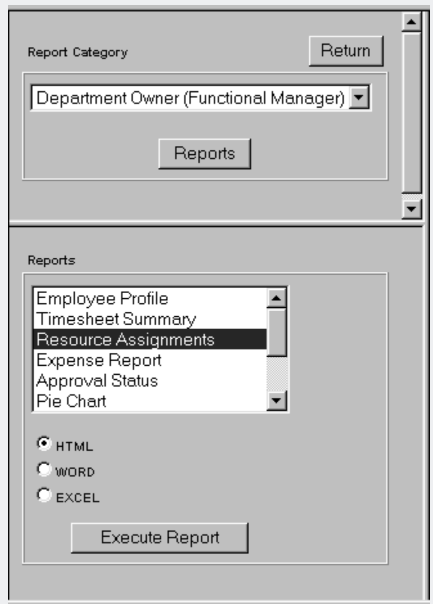


Figure 2.1B

NOTE Figure 2.1B displays the TimeWizard.*enterprise* report selection frames.

4. Click on the Preview or Print command button to run the report. For TimeWizard.*enterprise*, click on the Execute Report command button.

Objective 2: Set parameter values for a report

TimeWizard requires that you specify parameter values for your reports. These values tell TimeWizard and the Crystal Report Writer application how to construct your selected report using the data you require. The parameter value settings differ for each report, but the process is the same. The following steps are explained in more detail for each report in Objectives 2a - 2r.

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click “Preview” or “Print” to open the Enter Parameter Values window for the selected report.
4. Click each parameter value tab and enter the appropriate values. Table 2.1 explains specific rules that apply to the parameter value setup for TimeWizard.enterprise.
5. Click “OK” to save the settings and preview or print the report.

NOTE

Both the “Preview” and “Print” command buttons open the Enter Parameter Values window for the selected report. The difference in the commands is when you complete the parameter values setup process and click the “OK” command button. TimeWizard then either previews or prints the selected report, depending on which command began the setup process.

NOTE

Assuming your custom fields for activities are “Project” and “Task”:

- If you want to see hours summed by Project in the report, then select only act_ukey1.
- If you want to see hours summarized at the Task level, then select act_ukey 1 and act_ukey2
- If you want to see hours summarized by detail code values, then select that value. For example, the detail code field named “Cost Type”may be selected to summarize hours by an associated value named “regular” or “overtime.”

Objective 2a: Set parameter values for the Employee Profile report

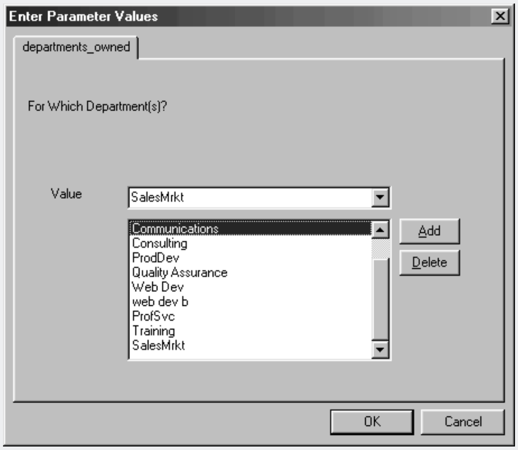


Figure 2.2

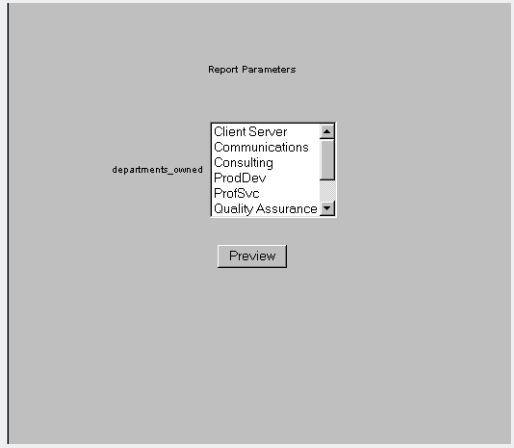


Figure 2.3

To select a report category and report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the departments_owned tab (Figure 2.2) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.
5. Click OK to preview the selected report with the specified settings.

NOTE: Figure 2.3 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2b: Set parameter values for Activity Summary report *(continued on page 16)*

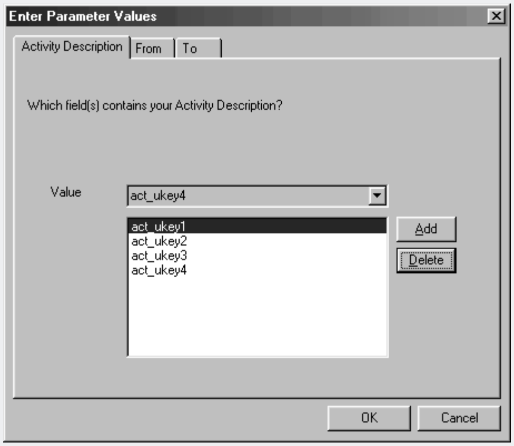


Figure 2.4

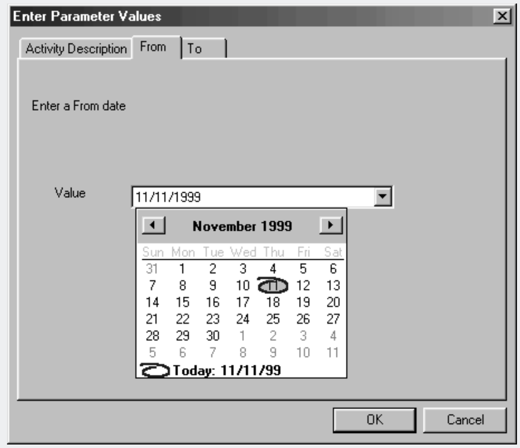


Figure 2.5

To set up an Activity Summary report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the Activity Description tab (Figure 2.4). Click on the Value drop-down menu to display the fields that contain your activity description. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

NOTE Contact your company's TimeWizard Administrator for exact field descriptions.
- act_ukey = activity codes
- trans_ukey = detail codes.

5. Click the From tab (Figure 2.5). TimeWizard displays a drop-down calendar, from which you may select a specific period starting date. Specify the starting date from which you want to generate the report.

Objective 2b: Set parameter values for Activity Summary report *(continued from page 15)*

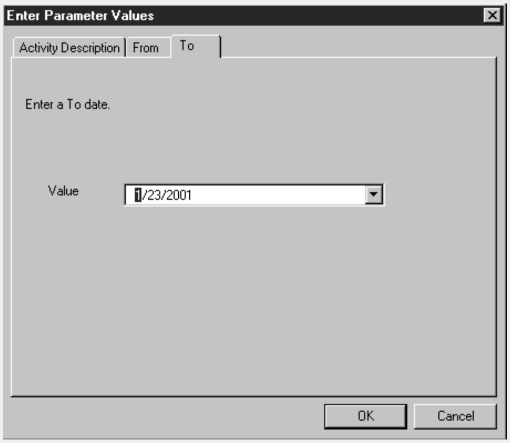


Figure 2.6

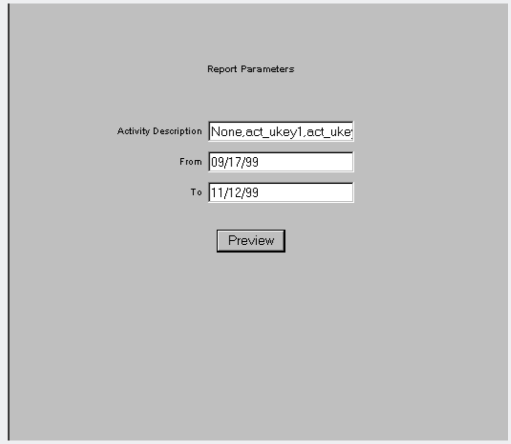


Figure 2.7

6. Click the To tab (Figure 2.6). TimeWizard displays a drop-down calendar, from which you may select a specific period ending date. Specify the ending date for which you want to generate the report.

7. Click OK to preview the selected report with the specified settings.

NOTE Figure 2.7 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2c: Set parameter values for Timesheet Summary report *(continued on page 18)*

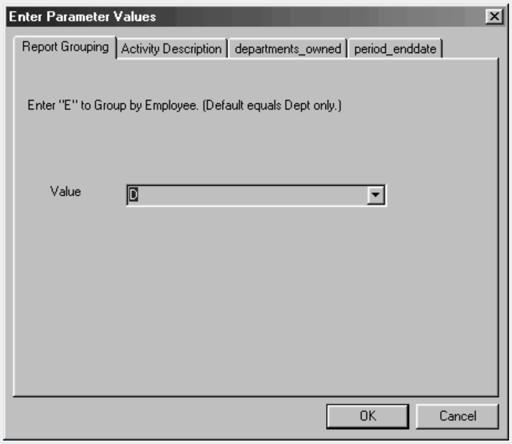


Figure 2.8

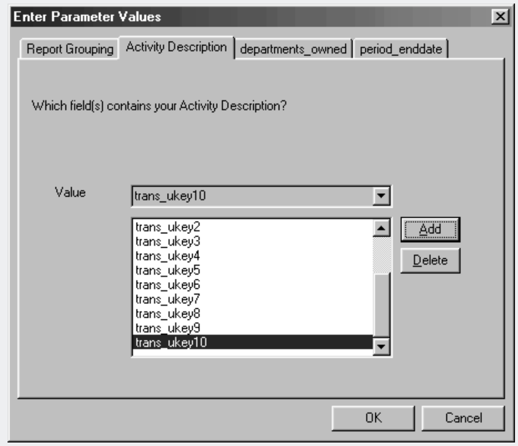


Figure 2.9

To set up a Timesheet Summary report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the Report Grouping tab (Figure 2.8). Click on the Value drop-down menu and select "E" to group by employee (i.e., yourself) or "D" to group by a department.
5. Click the Activity Description tab (Figure 2.9). Click on the Value drop-down menu to display the fields that contain your activity description. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

NOTE Contact your company's TimeWizard Administrator for exact field descriptions.
- act_ukey = activity codes
- trans_ukey = detail codes.

Objective 2c: Set parameter values for Timesheet Summary report *(continued from page 17)*

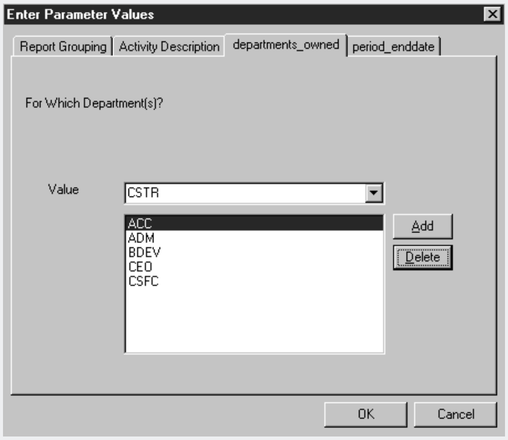


Figure 2.10

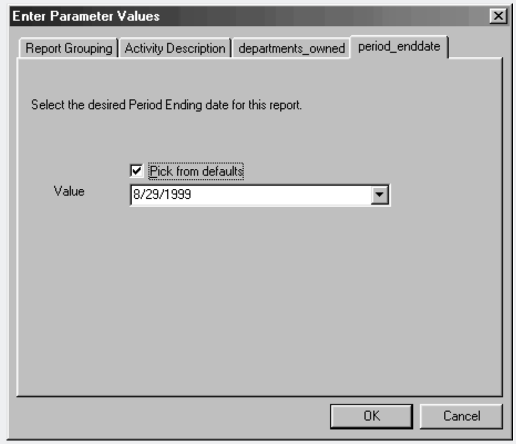


Figure 2.11

6. Click the departments_owned tab (Figure 2.10) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.
7. Click the period_enddate tab (Figure 2.11). Specify whether or not you want to select the period enddate from a default list. If the box is checked, TimeWizard displays a drop-down menu of available period enddates. If the box is not checked, TimeWizard displays a drop-down calendar, from which you may select a specific period enddate.
8. Click OK to preview the selected report with the specified settings.

NOTE Figure 2.12 displays the TimeWizard.*enterprise* parameter setup frame for the report.

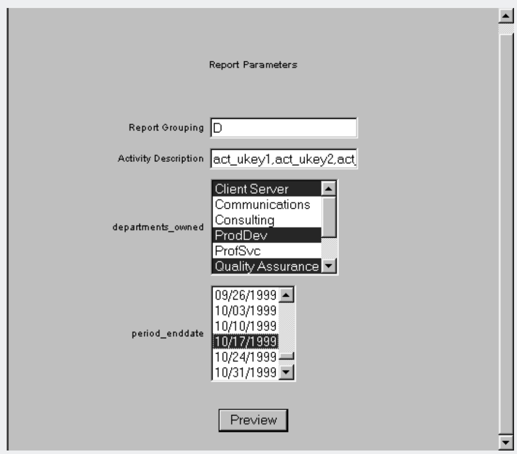


Figure 2.12

Objective 2d: Set parameter values for Resource Assignments for Department Owners report
(continued on page 20)

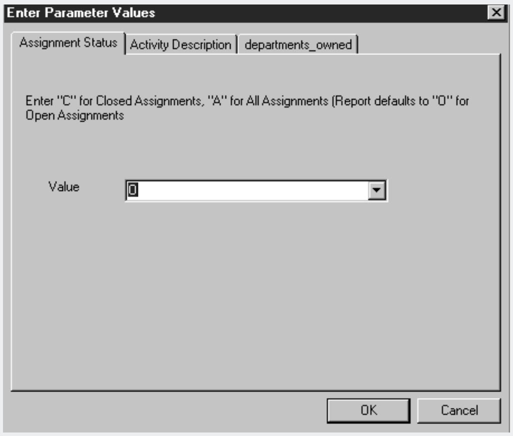


Figure 2.13

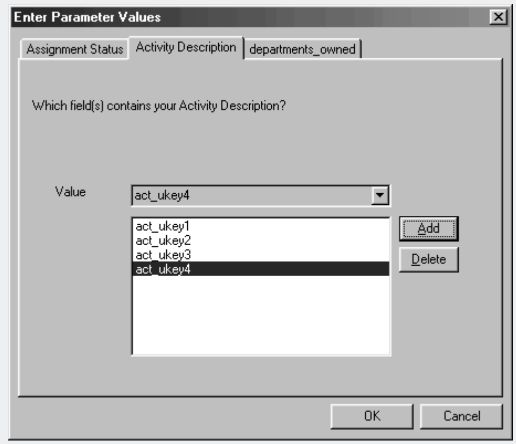


Figure 2.14

To set up a Resource Assignments for Department Owners report, follow these steps:

1. Click the Run Reports toolbar icon  or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the Assignment Status tab (Figure 2.13). Click on the Value drop-down menu and select "C" to group by closed assignments or "A" to group by all assignments or "O" to group by open assignments.
5. Click the Activity Description tab (Figure 2.14). Click on the Value drop-down menu to display the fields that contain your activity description. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

NOTE Contact your company's TimeWizard Administrator for exact field descriptions.
- act_ukey = activity codes
- trans_ukey = detail codes.

Objective 2d: Set parameter values for Resource Assignments for Department Owners report *(continued from page 19)*

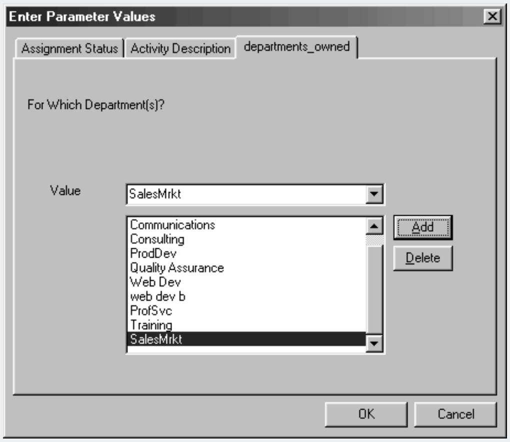


Figure 2.15

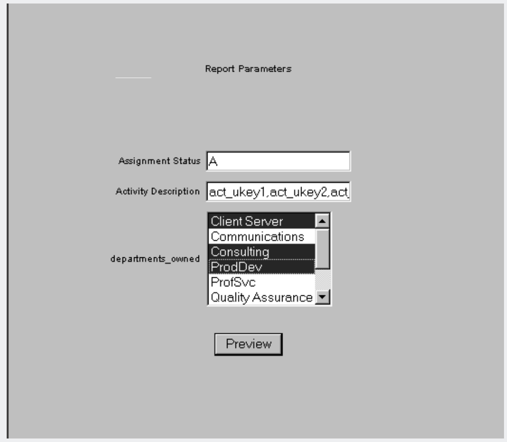


Figure 2.16

6. Click the departments_owned tab (Figure 2.15) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

7. Click OK to preview the selected report with the specified settings.

NOTE: Figure 2.16 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2e: Set parameter values for Resource Assignments for Activity Owners report *(continued on page 22)*

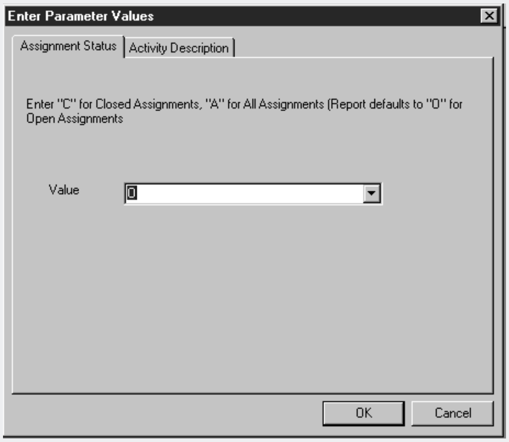


Figure 2.17

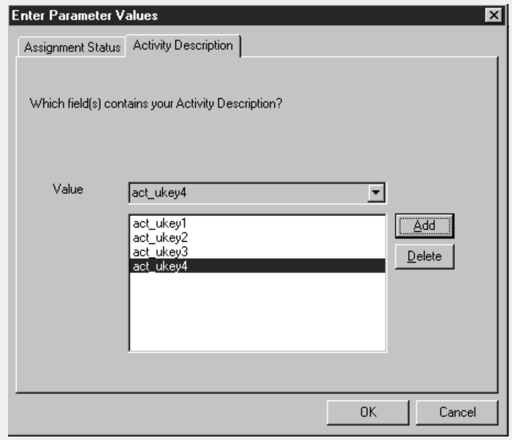


Figure 2.18

To set up a Resource Assingments for Activity Owners report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the Assignment Status tab (Figure 2.17). Click on the Value drop-down menu and select "C" to group by closed assignments or "A" to group by all assignments or "O" to group by open assignments.
5. Click the Activity Description tab (Figure 2.18). Click on the Value drop-down menu to display the fields that contain your activity description. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

NOTE Contact your company's TimeWizard Administrator for exact field descriptions.
- act_ukey = activity codes
- trans_ukey = detail codes.

Objective 2e: Set parameter values for Resource Assignments for Activity Owners report ***(continued from page 21)***

6. Click OK to preview the selected report with the specified settings.

NOTE: Figure 2.19 displays the TimeWizard.*enterprise* parameter setup frame for the report.

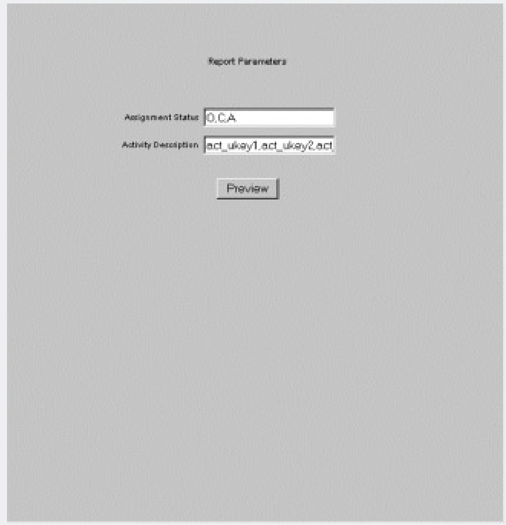


Figure 2.19

Objective 2f: Set parameter values for the Expense report *(continued on page 24)*

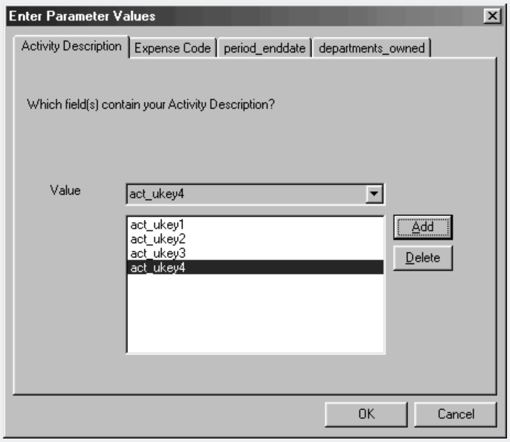


Figure 2.20

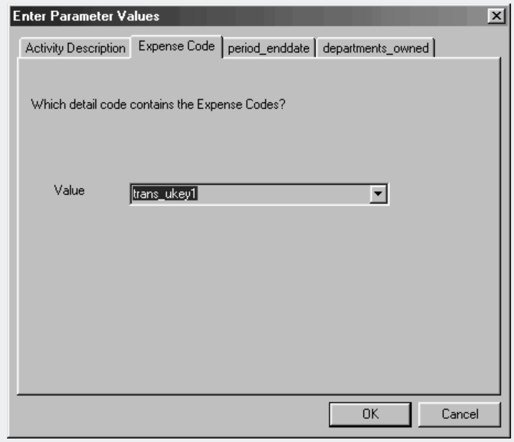


Figure 2.21

To set up a Timesheet Summary report, follow these steps:

1. Click the Run Reports toolbar icon  or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the Activity Description tab (Figure 2.20). Click on the Value drop-down menu to display the activity fields that contain your activity descriptions. Select the desired activity field.
5. Click the Expense Code tab (Figure 2.21). Click on the Value drop-down menu to display the detail code fields that contain your expense codes. Select the desired detail code field.

NOTE Contact your company's TimeWizard Administrator for exact field descriptions.
- act_ukey = activity codes
- trans_ukey = detail codes.

Objective 2f: Set parameter values for the Expense report *(continued from page 23)*

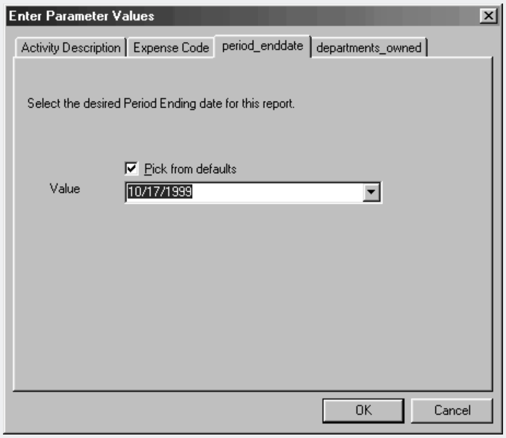


Figure 2.22

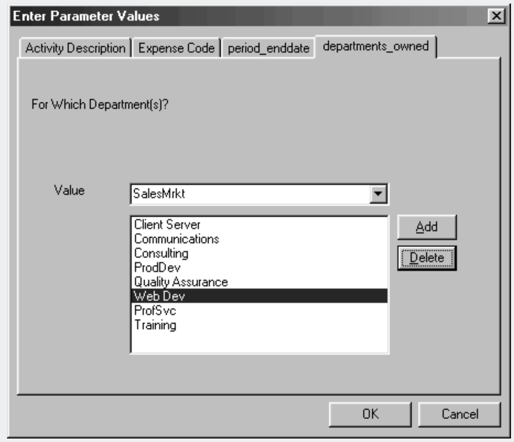


Figure 2.23

6. Click the period_enddate tab (Figure 2.22). Specify whether or not you want to select the period enddate from a default list. If the box is checked, TimeWizard displays a drop-down menu of available period enddates. If the box is not checked, TimeWizard displays a drop-down calendar, from which you may select a specific period enddate.
7. Click the departments_owned tab (Figure 2.23) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.
8. Click OK to preview the selected report with the specified settings.

NOTE: Figure 2.24 displays the TimeWizard.*enterprise* parameter setup frame for the report.

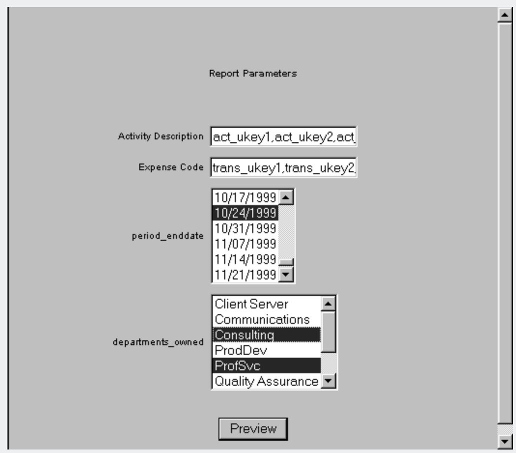


Figure 2.24

Objective 2g: Set parameter values for the Pie Chart for Department Owners report ***(continued on page 26)***

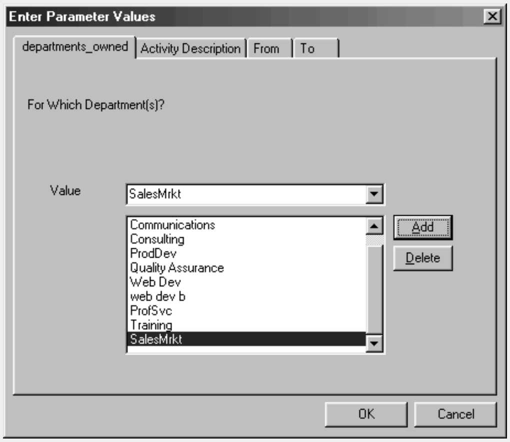


Figure 2.25

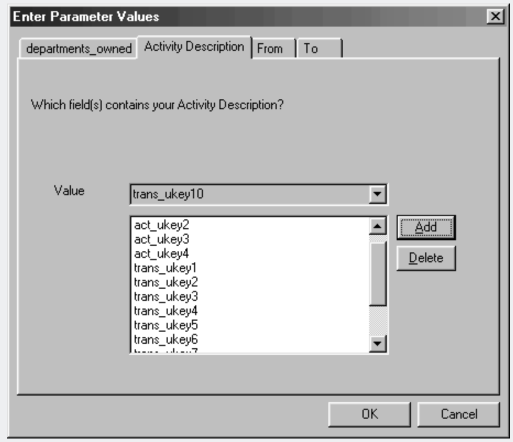


Figure 2.26

To set up a Pie Chart for Department Owners report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the departments_owned tab (Figure 2.25) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.
5. Click the Activity Description tab (Figure 2.26). Click on the Value drop-down menu to display the fields that contain your activity description. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

NOTE Contact your company's TimeWizard Administrator for exact field descriptions.
- act_ukey = activity codes
- trans_ukey = detail codes..

Objective 2g: Set parameter values for the Pie Chart for Department Owners report *(continued from page 25)*

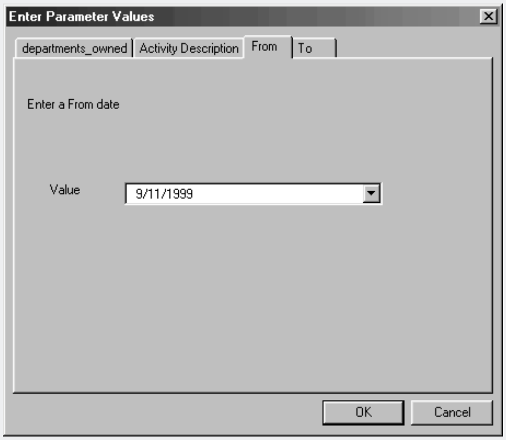


Figure 2.27

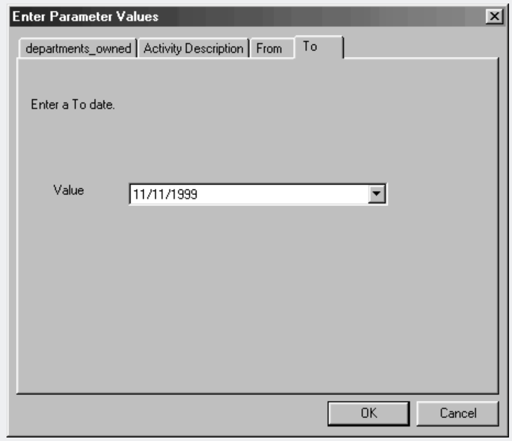


Figure 2.28

6. Click the From tab (Figure 2.27). TimeWizard displays a drop-down calendar, from which you may select a specific period starting date. Specify the starting date from which you want to generate ther report.
7. Click the To tab (Figure 2.28). TimeWizard displays a drop-down calendar, from which you may select a specific period ending date. Specify the ending date from which you want to generate the report.
8. Click OK to preview the selected report with the specified settings.

NOTE Figure 2.29 displays the TimeWizard.*enterprise* parameter setup frame for the report.

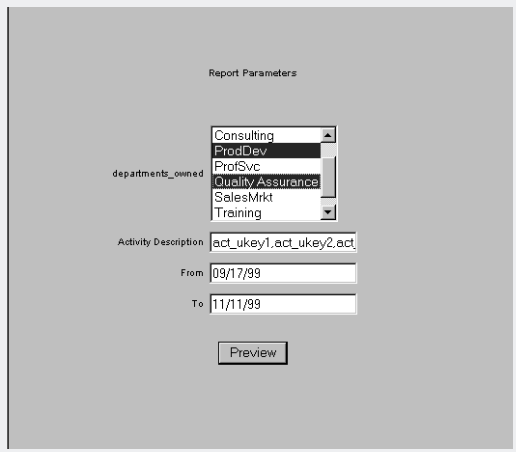


Figure 2.29

Objective 2h: Set parameter values for the Pie Chart for Activity Owners report *(continued on page 28)*

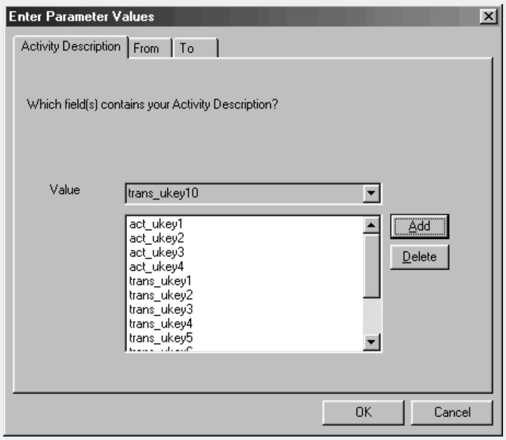


Figure 2.30

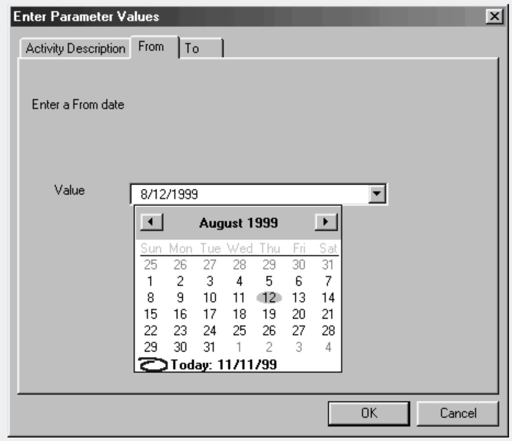


Figure 2.31

To set up a Pie Chart for Activity Owners report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the Activity Description tab (Figure 2.30). Click on the Value drop-down menu to display the fields that contain your activity description. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

   NOTE: Contact your company's TimeWizard Administrator for exact field descriptions.
   - act_ukey = activity codes
   - trans_ukey = detail codes.
5. Click the From tab (Figure 2.31). TimeWizard displays a drop-down calendar, from which you may select a specific period starting date. Specify the starting date from which you want to generate the report.

Objective 2h: Set parameter values for the Pie Chart for Activity Owners report ***(continued from page 27)***

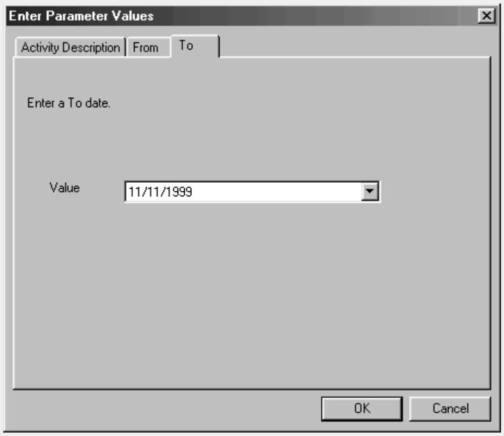


Figure 2.32

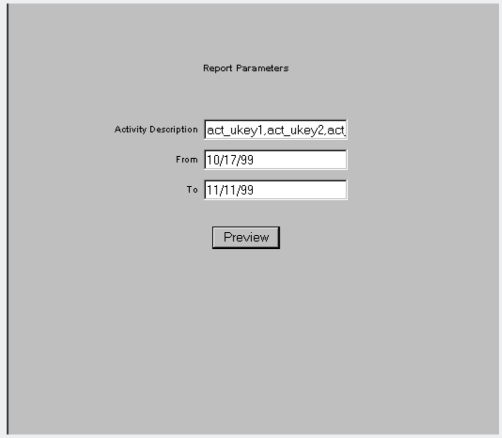


Figure 2.33

6. Click the To tab (Figure 2.32). TimeWizard displays a drop-down calendar, from which you may select a specific period ending date. Specify the ending date from which you want to generate the report.

7. Click OK to preview the selected report with the specified settings.

NOTE Figure 2.33 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2i: Set parameter values for the Bar Chart for Department Owners report *(continued on page 30)*

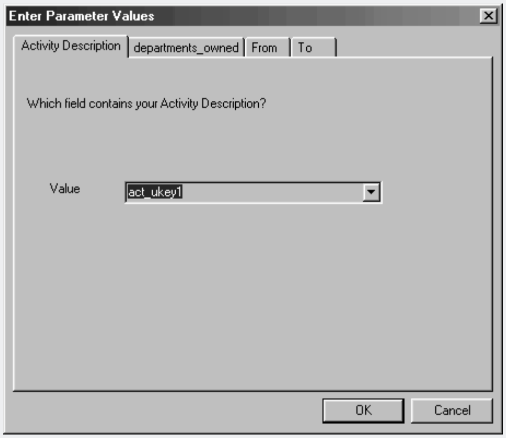


Figure 2.34

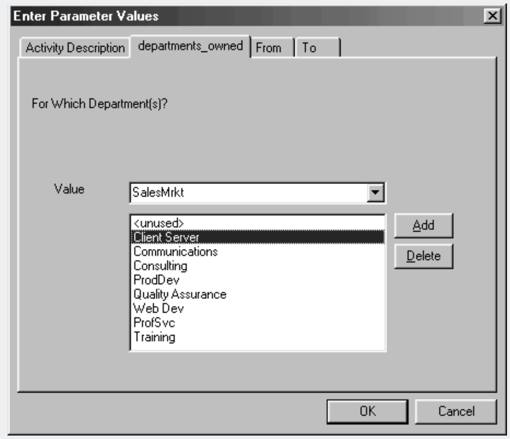


Figure 2.35

To set up a Bar Chart for Department Owners report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the Activity Description tab (Figure 2.34). Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

NOTE Contact your company's TimeWizard Administrator for exact field descriptions.
- act_ukey = activity codes
- trans_ukey = detail codes.

5. Click the departments_owned tab (Figure 2.35) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain your activity description. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

Objective 2i: Set parameter values for the Bar Chart for Department Owners report *(continued from page 29)*

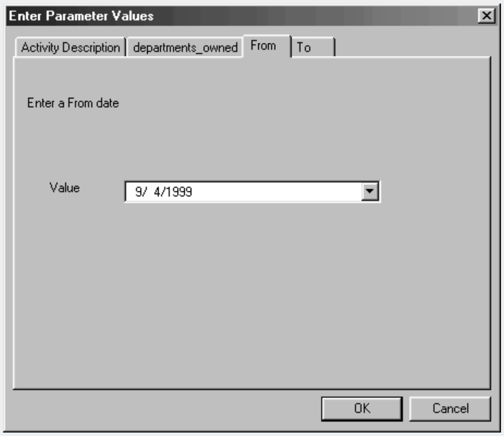


Figure 2.36

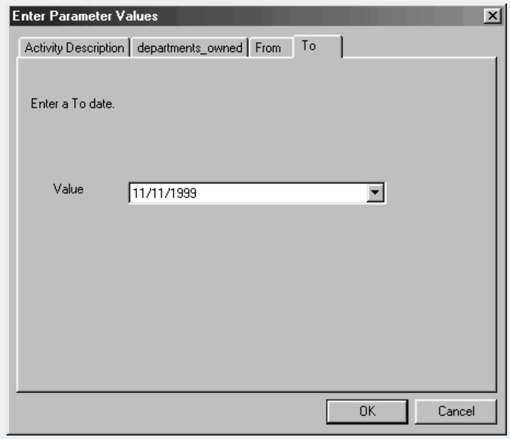


Figure 2.37

6. Click the From tab (Figure 2.36). TimeWizard displays a drop-down calendar, from which you may select a specific period starting date. Specify the starting date from which you want to generate the report.
7. Click the To tab (Figure 2.37). TimeWizard displays a drop-down calendar, from which you may select a specific period ending date. Specify the ending date from which you want to generate the report.
8. Click OK to preview the selected report with the specified settings.

NOTE Figure 2.38 displays the TimeWizard.*enterprise* parameter setup frame for the report.

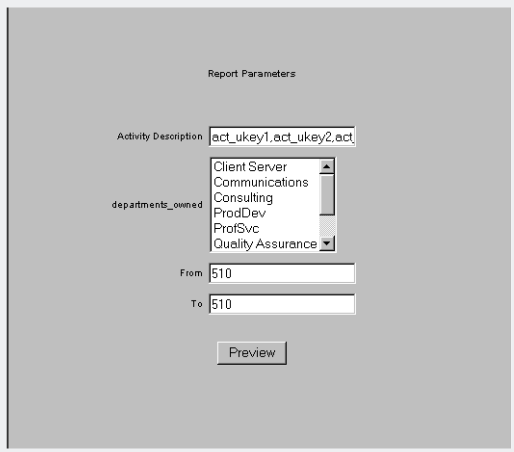


Figure 2.38

Objective 2j: Set parameter values for the Bar Chart for Activity Owners report *(continued on page 32)*

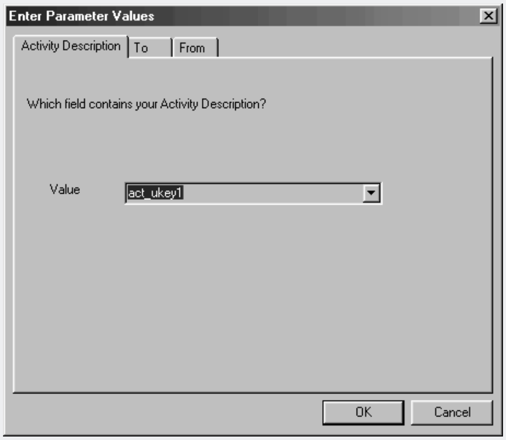


Figure 2.39

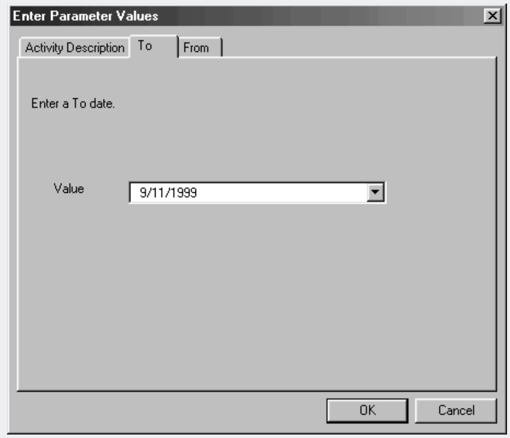


Figure 2.40

To set up a Bar Chart for Activity Owners report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the Activity Description tab (Figure 2.39). Click on the Value drop-down menu to display the fields that contain your activity description. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

   NOTE: Contact your company's TimeWizard Administrator for exact field descriptions.
   - act_ukey = activity codes
   - trans_ukey = detail codes.
5. Click the To tab (Figure 2.40). TimeWizard displays a drop-down calendar, from which you may select a specific period ending date. Specify the ending date from which you want to generate the report.

Objective 2j: Set parameter values for the Bar Chart for Activity Owners report *(continued from page 31)*

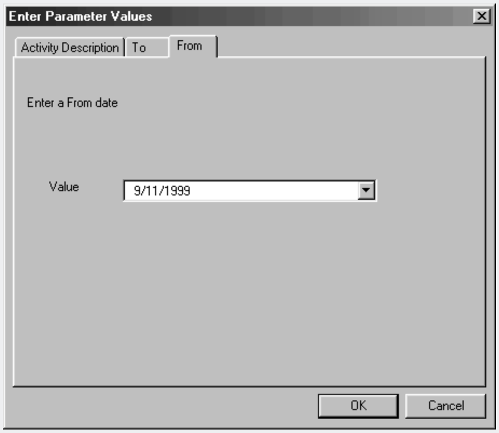


Figure 2.41

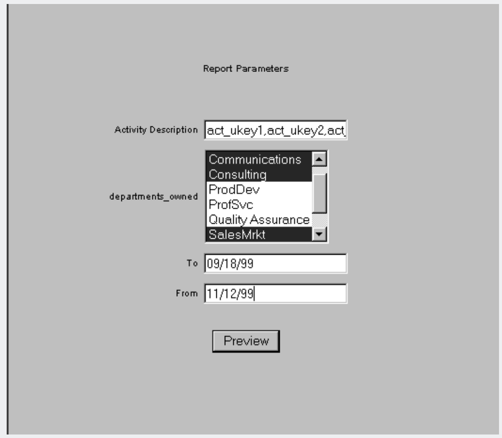


Figure 2.42

6. Click the From tab (Figure 2.41). TimeWizard displays a drop-down calendar, from which you may select a specific period starting date. Specify the starting date from which you want to generate the report.

7. Click OK to preview the selected report with the specified settings.

NOTE: Figure 2.42 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2k: Set parameter values for the Timesheet report

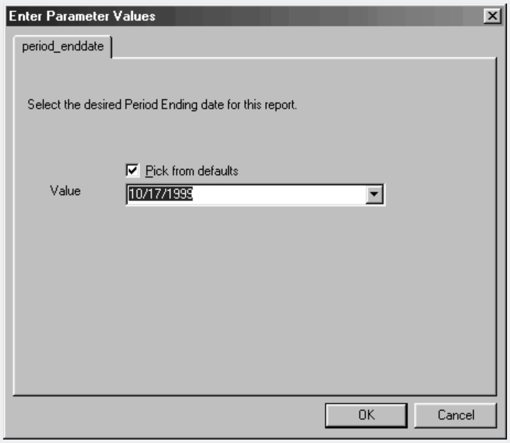


Figure 2.43

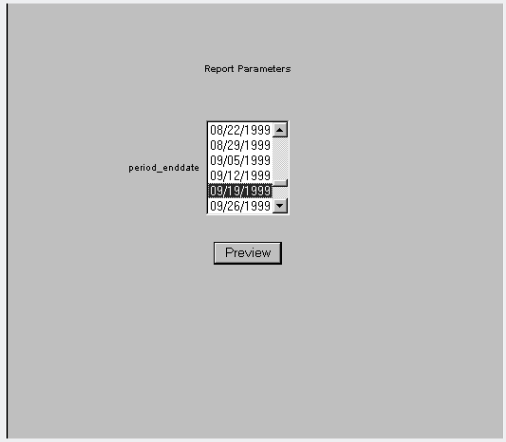


Figure 2.44

To set up a Timesheet report, follow these steps:

1. Click the Run Reports toolbar icon  or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. In the period_enddate tab (Figure 2.43). Specify whether or not you want to select the period endate from a default list. If the box is checked, TimeWizard displays a drop-down menu of available period enddates. If the box is not checked, TimeWizard displays a drop-down calendar, from which you may select a specific period enddate.
5. Click OK to preview the selected report with the specified settings.

NOTE Figure 2.44 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2l: Set parameter values for the Timesheet Report for Department Owners ***(continued on page 35)***

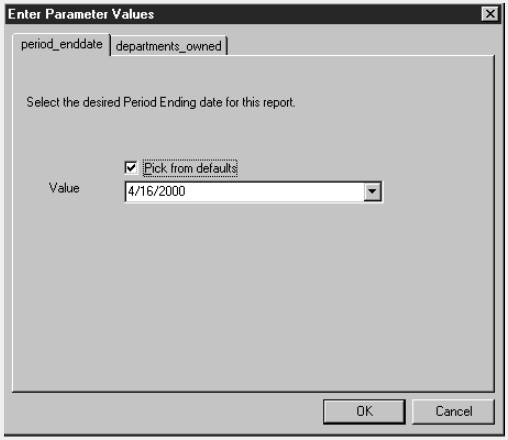


Figure 2.45

To set up a Timesheet Report for Department Owners, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the period_enddate tab (Figure 2.45). Specify whether or not you want to select the period enddate from a default list. If the box is checked, TimeWizard displays a drop-down menu of available period enddates. If the box is not checked, TimeWizard displays a drop-down calendar, from which you may select a specific period enddate.

Objective 2l: Set parameter values for the Timesheet Report for Department Owners *(continued from page 34)*

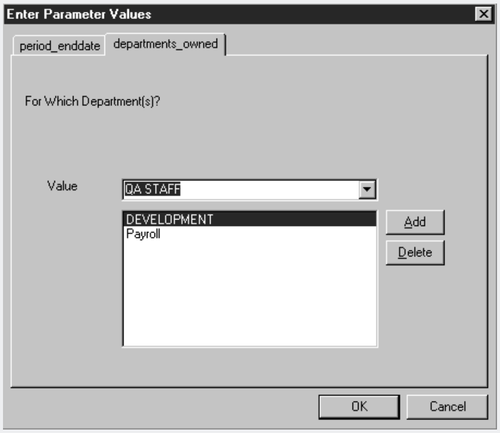


Figure 2.46

5. Click the departments_owned tab (Figure 2.46) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

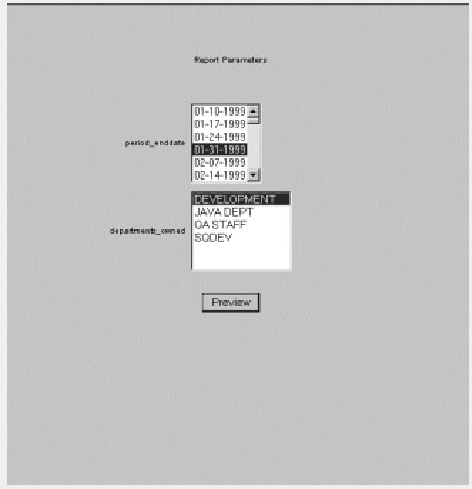


Figure 2.47

6. Click OK to preview the selected report with the specified settings.

NOTE Figure 2.47 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2m: Set parameter values for the Missing Timesheet report *(continued on page 37)*

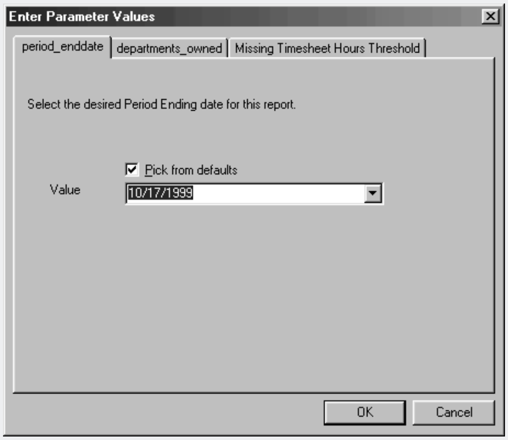


Figure 2.48

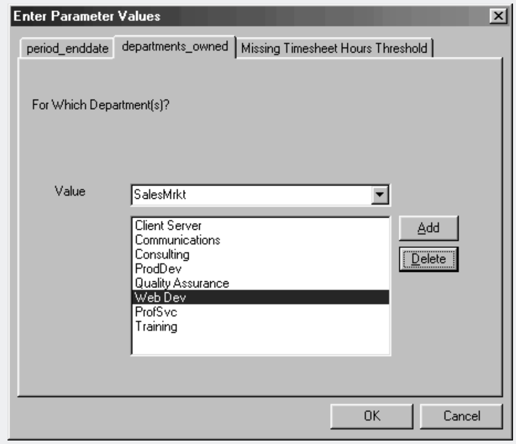


Figure 2.49

To set up a Missing Timesheet report, follow these steps:

1. Click the Run Reports toolbar icon  or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the period_enddate tab (Figure 2.48). Specify whether or not you want to select the period enddate from a default list. If the box is checked, TimeWizard displays a drop-down menu of available period enddates. If the box is not checked, TimeWizard displays a drop-down calendar, from which you may select a specific period enddate.
5. Click the departments_owned tab (Figure 2.49) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

Objective 2m: Set parameter values for the Missing Timesheet report *(continued from page 36)*

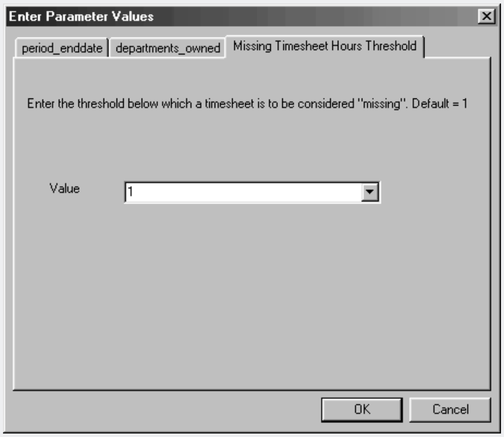


Figure 2.50

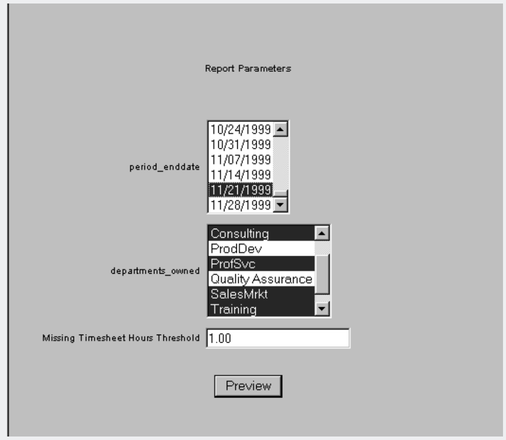


Figure 2.51

6. Click the Missing Timesheet Hours Threshold tab (Figure 2.50). Select or enter the threshold below which a timesheet is considered "missing."

NOTE: The default value = 1. This means that any timesheet with fewer than one hour is considered as "missing." However, you may alter this hours value.

7. Click OK to preview the selected report with the specified settings.

NOTE: Figure 2.51 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2n: Set parameter values for the Missing Approvals report

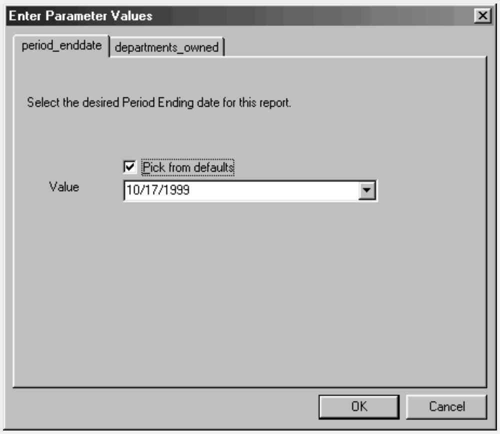


Figure 2.52

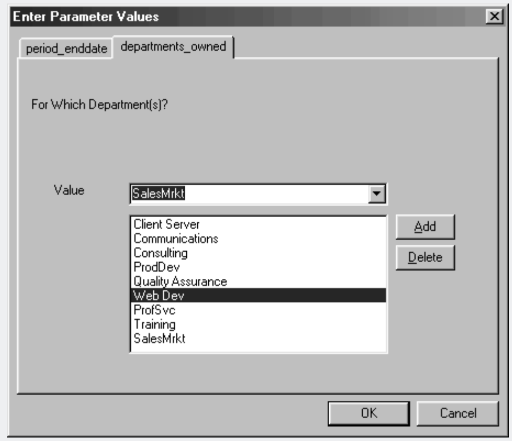


Figure 2.53

To set up a Missing Approvals report, follow these steps:

1. Click the Run Reports toolbar icon  or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the period_enddate tab (Figure 2.52). Specify whether or not you want to select the period enddate from a default list. If the box is checked, TimeWizard displays a drop-down menu of available period enddates. If the box is not checked, TimeWizard displays a drop-down calendar, from which you may select a specific period enddate.
5. Click the departments_owned tab (Figure 2.53) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

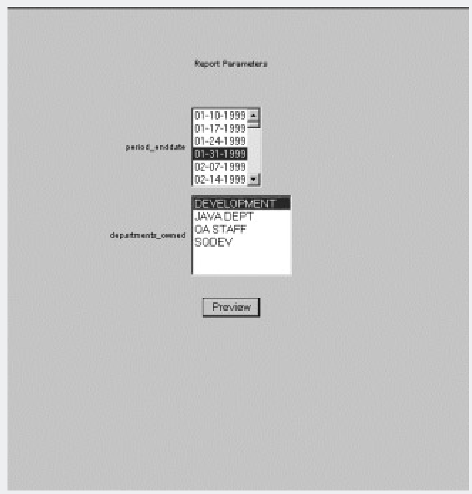


Figure 2.54

6. Click OK to preview the selected report with the specified settings.

NOTE: Figure 2.54 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2o: Set parameter values for the Timesheet Status report *(continued on page 40)*

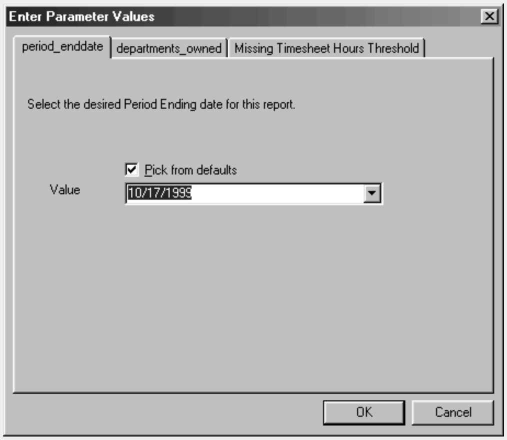


Figure 2.55

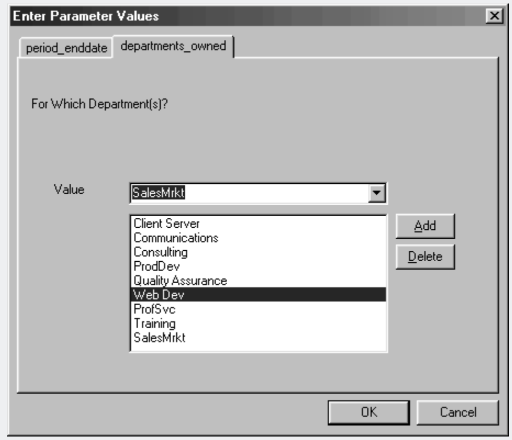


Figure 2.56

To set up a Timesheet Status report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the period_enddate tab (Figure 2.55). Specify whether or not you want to select the period enddate from a default list. If the box is checked, TimeWizard displays a drop-down menu of available period enddates. If the box is not checked, TimeWizard displays a drop-down calendar, from which you may select a specific period enddate.
5. Click the departments_owned tab (Figure 2.56) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain your activity description. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

Objective 2o: Set parameter values for the Timesheet Status report *(continued from page 39)*

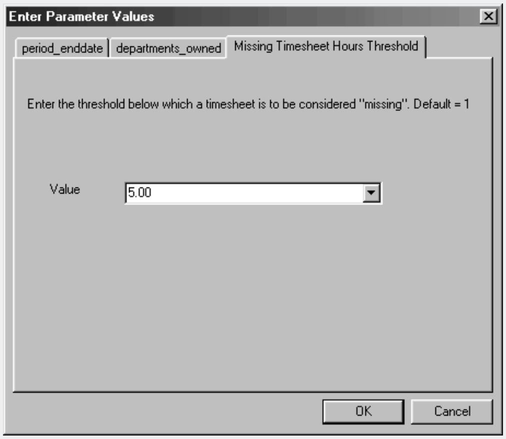


Figure 2.57

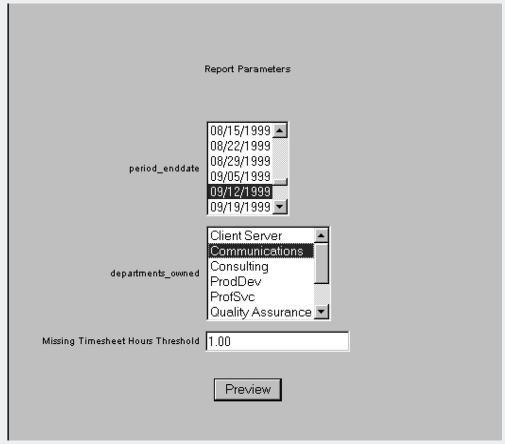


Figure 2.58

6. Click the Missing Timesheet Hours Threshold tab (Figure 2.57). Select or enter the threshold below which a timesheet is considered "missing."

NOTE: The default value = 1. This means that any timesheet with fewer than one hour is considered as "missing." However, you may alter this hours value.

7. Click OK to preview the selected report with the specified settings.

NOTE: Figure 2.58 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2p: Set parameter values for the Billing report *(continued on page 42)*

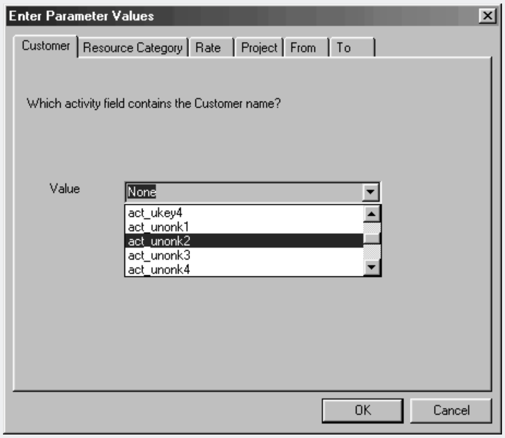


Figure 2.59

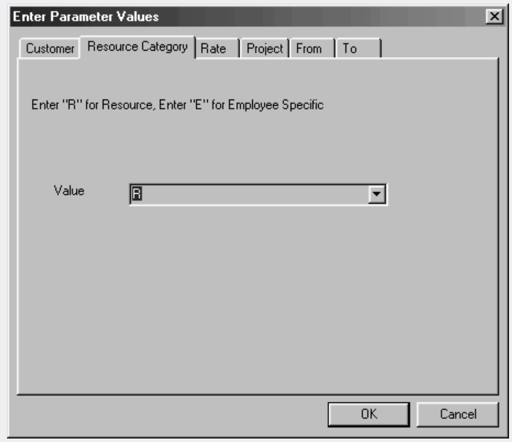


Figure 2.60

To set up a Billing report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report.
4. Click the Customer tab (Figure 2.59). Click on the Value drop-down menu to display the field that contains your customer name.

   NOTE: Contact your company's TimeWizard Administrator for exact field descriptions.
   - act_ukey = key activity codes
   - act_unonk = non-key activity codes

5. Click the Resource Category tab (Figure 2.60). Click on the Value drop-down menu and select "R" to group by Resource or "E" to group by Employee Specific.

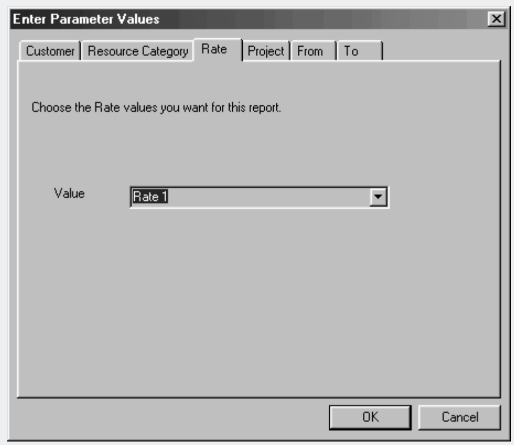


Figure 2.61

6. Click the Rate tab (Figure 2.61). Click on the Value drop-down menu to display the field that contains your desired rate.

Objective 2p: Set parameter values for the Billing report *(continued from page 41 and continued on page 43)*

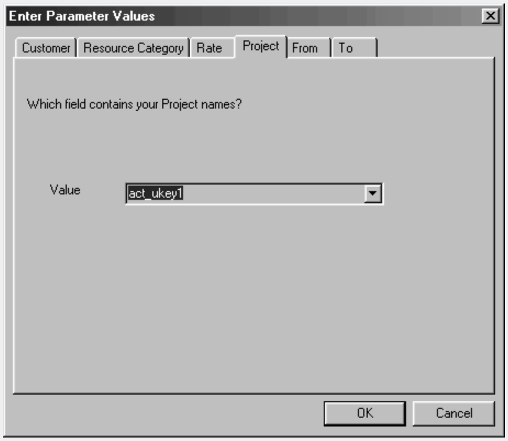


Figure 2.62

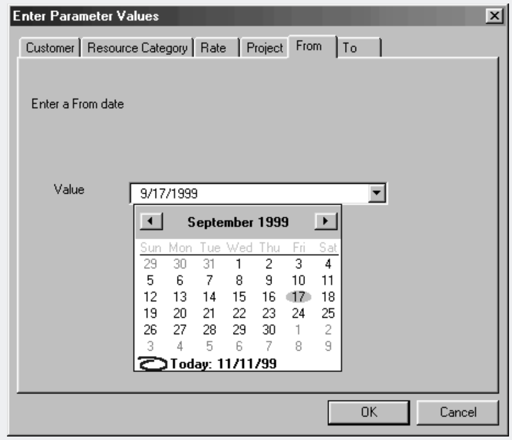


Figure 2.63

7. Click the Project tab (Figure 2.62). Click on the Value drop-down menu to display the field that contains your Project name.

8. Click the From tab (Figure 2.63). TimeWizard displays a drop-down calendar, from which you may select a specific period starting date. Specify the starting date from which you want to generate the report.

Objective 2p: Set parameter values for the Billing report *(continued from page 42)*

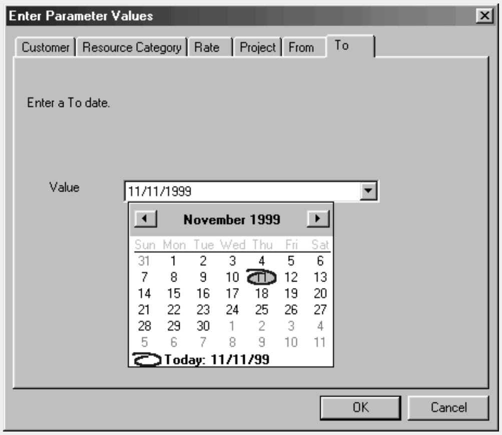


Figure 2.64

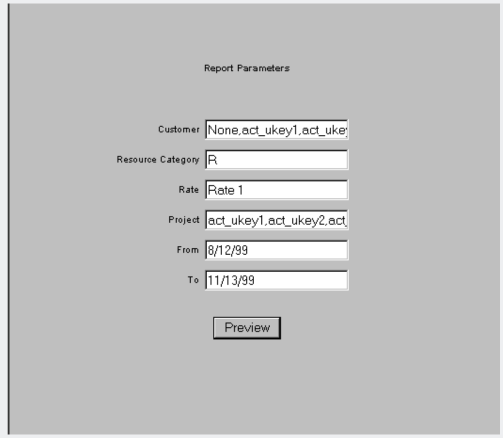


Figure 2.65

9. Click the To tab (Figure 2.64). TimeWizard displays a drop-down calendar, from which you may select a specific period ending date. Specify the ending date from which you want to generate ther report.

10. Click OK to preview the selected report with the specified settings.

NOTE Figure 2.65 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2q: Set parameter values for the Resource Code Associations report

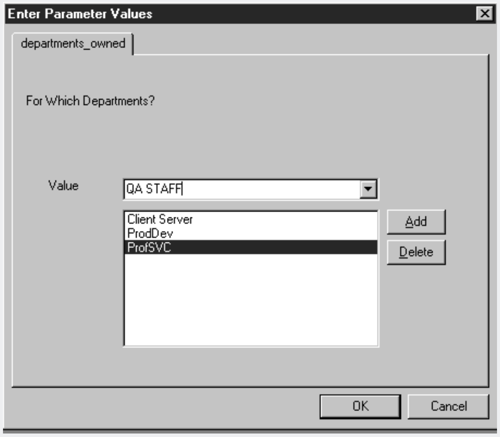


Figure 2.66

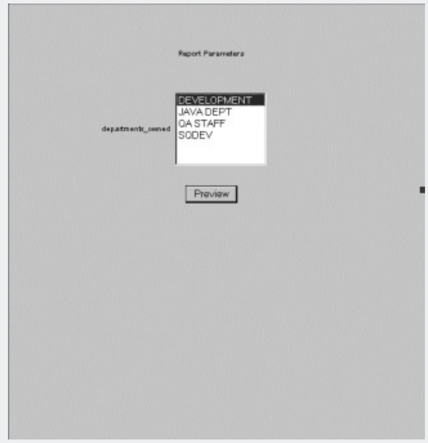


Figure 2.67

To set up a Timesheet Status report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click “Preview” to open the Enter Parameter Values window for the selected report .
4. Click the departments_owned tab (Figure 2.66) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.
5. Click OK to preview the selected report with the specified settings.

NOTE: Figure 2.67 displays the TimeWizard.*enterprise* parameter setup frame for the report.

Objective 2r: Set parameter values for the Timesheet Audit report

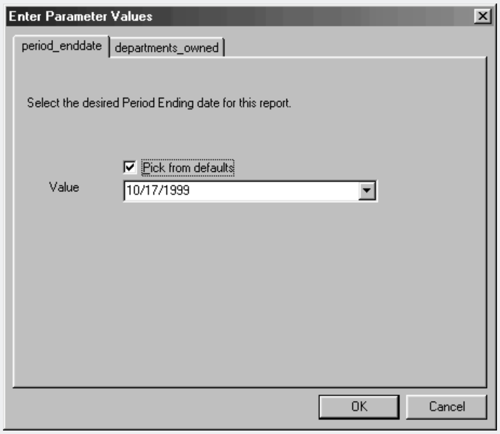


Figure 2.68

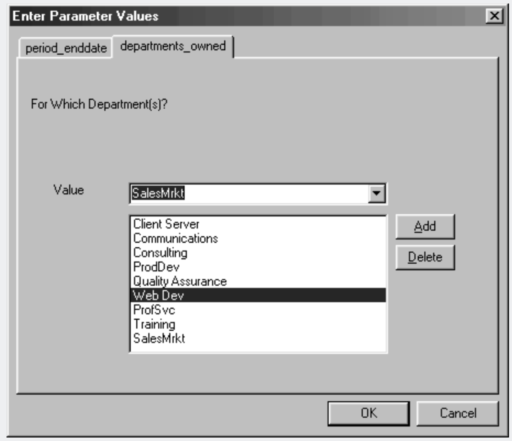


Figure 2.69

To set up a Timesheet Audit report, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. In the Run Reports dialog box, select a report category and report.
3. Click "Preview" to open the Enter Parameter Values window for the selected report .
4. Click the period_enddate tab (Figure 2.68). Specify whether or not you want to select the period enddate from a default list. If the box is checked, TimeWizard displays a drop-down menu of available period enddates. If the box is not checked, TimeWizard displays a drop-down calendar, from which you may select a specific period enddate.
5. Click the departments_owned tab (Figure 2.69) to specify the departments (that you own) for which you want to generate the report. Click on the Value drop-down menu to display the fields that contain the departments owned. Select the desired field and click Add to add the field to the selection box. To delete a selection, select a field in the lower box and click Delete.

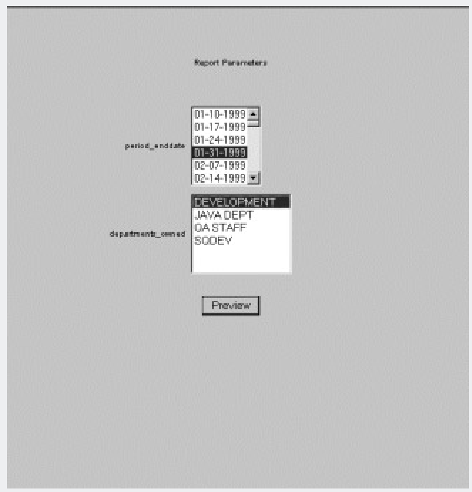


Figure 2.70

6. Click OK to preview the selected report with the specified settings.

NOTE: Figure 2.70 displays the TimeWizard.*enterprise* parameter setup frame for the report.

CHAPTER 3

Exporting and Printing Reports

Once you have completed setting up the parameter values, TimeWizard enables you to generate the report as a file for export or to print the report.

Objectives

1. Set up printing specifications
2. Export a report
3. Print a report

Objective 1: Set up printing specifications

TimeWizard enables you to specify a soecific network or local printer from which you can send reports.

NOTE: TimeWizard.*enterprise* uses your browser settings for printing. To print a generated report, select File > Print in your browser's main menu.

Setting up printing specifications

To set up printing specifications, follow these steps:

1. Click the Run Reports toolbar icon or select Tools > Reports > Run Reports from the main menu to open the Run Reports dialog box.
2. Click Print Setup to open the Printer Setup dialog box.
3. Select the appropriate printer from the printer menu.
4. Click "Setup" to specify printer setup preferences. Follow the setup instruction supplied by your printer vendor.
5. Click "OK" to save printer settings and exit the dialog box.

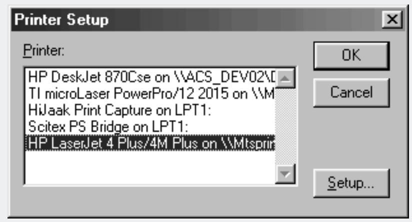


Figure 3.1

Objective 2: Export a report

Once you have completed setting up the parameter values for the selected report and you have previewed the report, TimeWizard enables you to export the report to a specified destination in a format of your choosing. Tables 3.1 and 3.2 list the export destination and format options available in the TimeWizard client-server application.

The export file formats available in TimeWizard.*enterprise* are HTML, Word, and Excel. You select the desired file format before executing and previewing the selected report (see Figure 3.3).

Exporting a report

To export a report, follow these steps:

1. In the report preview window, click the Export icon to open the Export dialog box.
2. In the Export dialog box, click the Format drop-down box to select your format option. Table 3.2 lists the format options.
3. Click the Destination drop-down box to select your destination option. Table 3.1 lists the destination options.
4. Click "OK" to save the settings and begin the export.

Figure 3.3 displays the TimeWizard.*enterprise* file format selection options, located in the Reports frame.

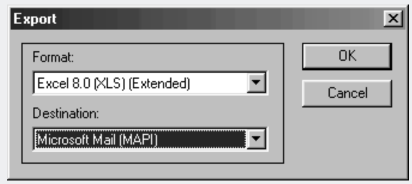


Figure 3.2

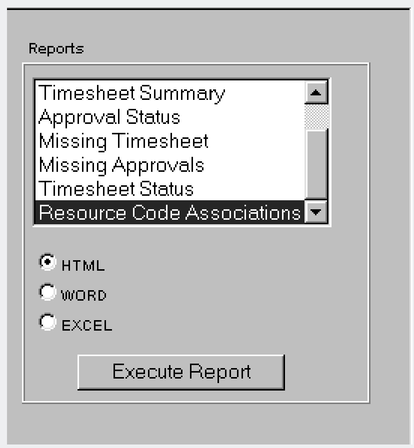


Figure 3.3

Table 3.1: Export Format Options

Export Destination Options
Application
Disk File
Exchange Folder
Lotus Notes Database
Microsoft Mail (MAPI compliant)

Table 3.2: Export Destination Options

Export Format Options
character-separated values
comma-separated values
Crystal Reports
Data Interchange Format
Excel 2.1

Objective 3: Print a report

Once you have completed setting up the parameter values for the selected report, TimeWizard enables you to print the report to a pre-specified printer destination. You may print the report immediately after the parameter value setup, or you may print the report from the report preview window.

Printing a report

To print a report, follow these steps:

1. In the report preview window, click the Print icon to open the Print dialog box.
2. In the Print dialog box, specify the print range and number of copies desired.
3. Click "OK" to save the settings and print the report.

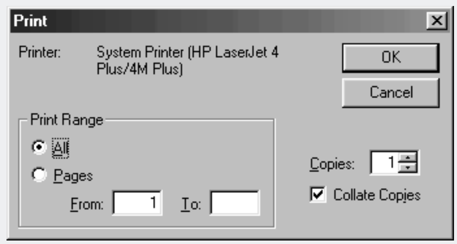


Figure 3.4

TimeWizard.*enterprise* uses your browser settings for printing. To print a generated report, select File > Print in your browser's main menu.

Summary

In this chapter, you have learned how to set up printer specifications, export a report in a file format of your choosing, and print a report.

A P P E N D I X **A**

Pre-installed Reports Reference

This Appendix offers a reference for each pre-installed TimeWizard report. Each reference includes a report name and description, categories to which the report belongs, and a standard report table that includes technical data. The following page displays a TimeWizard (client-server) example of the referenced report. Table A.1 explains the information presented in each standard report table (i.e., report file name, parameters used, and query). Table A.2 explains the indicators used within the subsequent reference tables.

Table A.1: Reports Reference Table

Report Table Data	Explanation
Report File Name	The name of the report file includes either "Ora" for Oracle or "SQL" for Microsoft SQL Server. The file extension is always ".rpt".
Parameters Used	The parameters are used to filter report data at runtime.
Query	The Query specifications identify the table and column of the SQL statement. The query structure is as follows: Select: "TABLE"."COLUMN" From: "TABLE"."COLUMN" Where: "TABLE"."COLUMN" = "TABLE"."COLUMN" And: "TABLE"."COLUMN" = "TABLE"."COLUMN"

Table A.2: Table Indicator Key

Indicator	ORACLE Datatype	MS SQL Datatype
*	VARCHAR2(100)	varchar(100)
**	VARCHAR2(255)	varchar(255)
***	NUMBER	int
	NUMBER	smallint

Indicator	ORACLE Datatype	MS SQL Datatype
	NUMBER	float
	NUMBER	decimal(14,0)
****	DATE	datetime
*****	LONG VARCHAR	text

Report Name: Employee Profile

Report Categories: Administrator, Department Owner

Description: This report will return a list of employees based on the departments owned by the user. If the user does not own any departments it will return the user's employee record. It includes all of the user defined fields from the security_profile table. It also will display the departments owned by each employee and the associated permissions for those departments.

Report File Name	EmpList (Ora or SQL).rpt
Parameters Used	Report Grouping, departments_owned, empid, sec_unonk1, sec_unonk2, sec_unonk3, sec_unonk4, sec_unonk5, sec_unonk6, sec_unonk7, sec_unonk8, sec_unonk9, sec_unonk10
Query (select)	"SECURITY_PROFILE"."EMP_ID", "SECURITY_PROFILE"."EMP_ID_USER", "SECURITY_PROFILE"."LOGINID", "SECURITY_PROFILE"."STATUS", "SECURITY_PROFILE"."FULLNAME", "SECURITY_PROFILE"."DEPT_CODE", "SECURITY_PROFILE"."DEPT_LOWEST", "SECURITY_PROFILE"."EMP_CODE", "SECURITY_PROFILE"."SALARY_CODE", "SECURITY_PROFILE"."SEC_UNONK1", "SECURITY_PROFILE"."SEC_UNONK2", "SECURITY_PROFILE"."SEC_UNONK3", "SECURITY_PROFILE"."SEC_UNONK4", "SECURITY_PROFILE"."SEC_UNONK5", "SECURITY_PROFILE"."SEC_UNONK6", "SECURITY_PROFILE"."SEC_UNONK7", "SECURITY_PROFILE"."SEC_UNONK8", "SECURITY_PROFILE"."SEC_UNONK9", "SECURITY_PROFILE"."SEC_UNONK10", "SECURITY_PROFILE"."EMAIL_LOGIN", "SECURITY_PROFILE"."IS_ADMIN", "DEPT_PROFILE"."DEPT_OWNED", "DEPT_PROFILE"."EMP_ID", "DEPT_PROFILE"."FNTIMSH", "DEPT_PROFILE"."FNDEPT", "DEPT_PROFILE"."TIMSHACCESS", "DEPT_PROFILE"."PRIMARY_APPROVER", "DEPT_PROFILE"."GROUP_APPROVE", "SECURITY_PROFILE1"."FULLNAME"
Query (from)	"SECURITY_PROFILE" "SECURITY_PROFILE", "DEPT_PROFILE" "DEPT_PROFILE", "SECURITY_PROFILE" "SECURITY_PROFILE1"
Query (Where)	"SECURITY_PROFILE"."EMP_ID" = "DEPT_PROFILE"."EMP_ID"(+)
Query (And)	"SECURITY_PROFILE"."MANAGER" = "SECURITY_PROFILE1"."EMP_ID"(+)

1 of 1 100% Total:9 100% 9 of 24

Employee Profile Report

Print Date: 11/11/99

Print Time: 9:48:24 AM

TimeWizard

Standard Resource Reports

ProdDev

Employee: **Aquelari, Stacey E**

Login ID:	Stacey	**Salary Code:**	Pay Grade 3	**SSN:**
Emp ID:	Emp033	**Emp Code:**	FTE	
Email	aquelari@websoft.c	**Dept Code:**	ProdDev	
Status:	Active	**Approval Level:**	ProdDev	
Admin:	Yes			
Manager:				

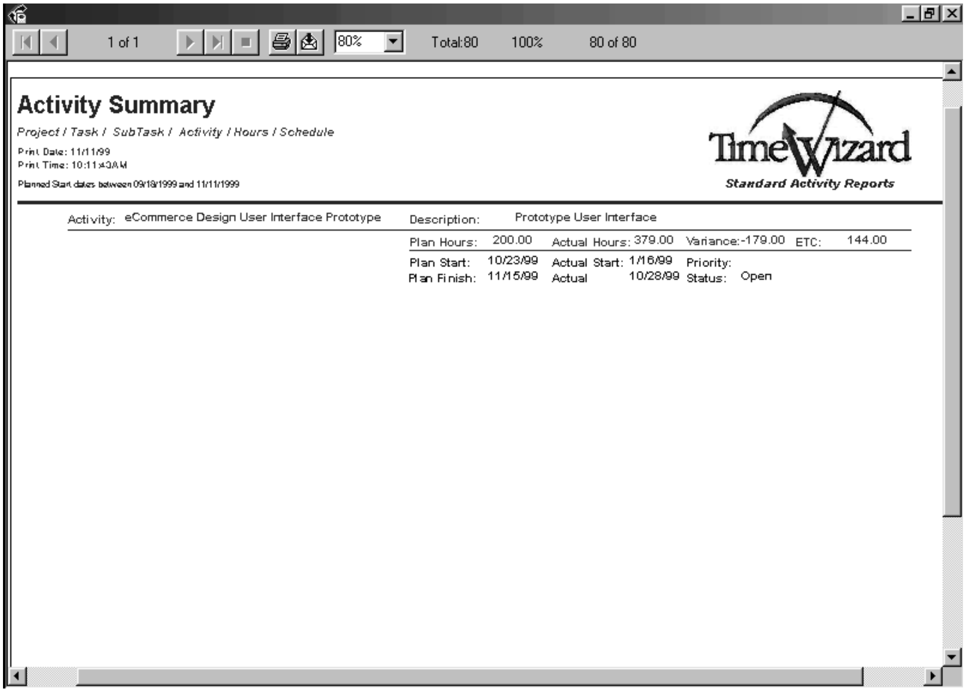
Department Ownership:	Aprv/Reject Timesheet	Primary Approver	Timesheet Access	Timesheet Functions
Client Server	Yes	Yes	Edit	Yes
Communications	No	No	Read-Only	No
Consulting	Yes	Yes	Read-Only	No
ProdDev	Yes	Yes	Edit	Yes
ProfSvc	Yes	No	Read-Only	No
Quality Assurance	Yes	Yes	Edit	Yes
SalesMrkt	Yes	No	Read-Only	No
Training	Yes	No	Read-Only	No
Web Dev	Yes	No	Read-Only	No

Report Name: Activity Summary

Report Categories: Administrator, Activity Owner, Financial

Description: This report will return a list of every activity in the database with a planned start date within the range the user specifies in the period_enddates field. It will also total the actual hours and the ETC hours from the transactions table. It will also find the earliest resource actual start date (Actual Start) and the latest actual finish date (Actual Finish) from the assignments table.

Report File Name	ActSum (Ora or SQL).rpt
Parameters Used	Activity Description, period_enddates, act_ukey1, act_ukey2, act_ukey3, act_ukey4
Query (select)	"ACTIVITIES"."ACT_UKEY1", "ACTIVITIES"."ACT_UKEY2", "ACTIVITIES"."ACT_UKEY3", "ACTIVITIES"."ACT_UKEY4", "ACTIVITIES"."PLANNED_START", "ACTIVITIES"."PLANNED_FINISH", "ACTIVITIES"."PRIORITY", " ACTIVITIES"."DESCRIPTION", "ASSIGNMENTS"."ACTIVITY_ID", "ASSIGNMENTS"."EMP_ID", "ASSIGNMENTS"."RES_AS", "ASSIGNMENTS"."RES_AF", "ASSIGNMENTS"."ETC_HRS", "ASSIGNMENTS"."REC_STATUS", "ASSIGNMENTS"."PLAN_HRS", "TRANSACTIONS"."EMP_ID", "TRANSACTIONS"."ACTIVITY_ID", "TRANSACTIONS"."TRANS_TYPE", "TRANSACTIONS"."TRANS_HOURS"
Query (from)	"ACTIVITIES" "ACTIVITIES", "ASSIGNMENTS" "ASSIGNMENTS", "TRANSACTIONS" "TRANSACTIONS"
Query (Where)	"ACTIVITIES"."ACTIVITY_ID" = "ASSIGNMENTS"."ACTIVITY_ID"
Query (And)	"ASSIGNMENTS"."ACTIVITY_ID" = "TRANSACTIONS"."ACTIVITY_ID" AND "ASSIGNMENTS"."EMP_ID" = "TRANSACTIONS"."EMP_ID"


1 of 1
80%
Total:80
100%
80 of 80
Activity Summary
Project / Task / SubTask / Activity / Hours / Schedule
Print Date: 11/11/99
Print Time: 10:11:43AM
Planned Start dates between 09/18/1999 and 11/11/1999
TimeWizard
Standard Activity Reports
Activity: eCommerce Design User Interface Prototype
Description: Prototype User Interface
Plan Hours: 200.00
Actual Hours: 379.00
Variance: -179.00
ETC: 144.00
Plan Start: 10/23/99
Actual Start: 1/16/99
Priority:
Plan Finish: 11/15/99
Actual 10/28/99
Status: Open

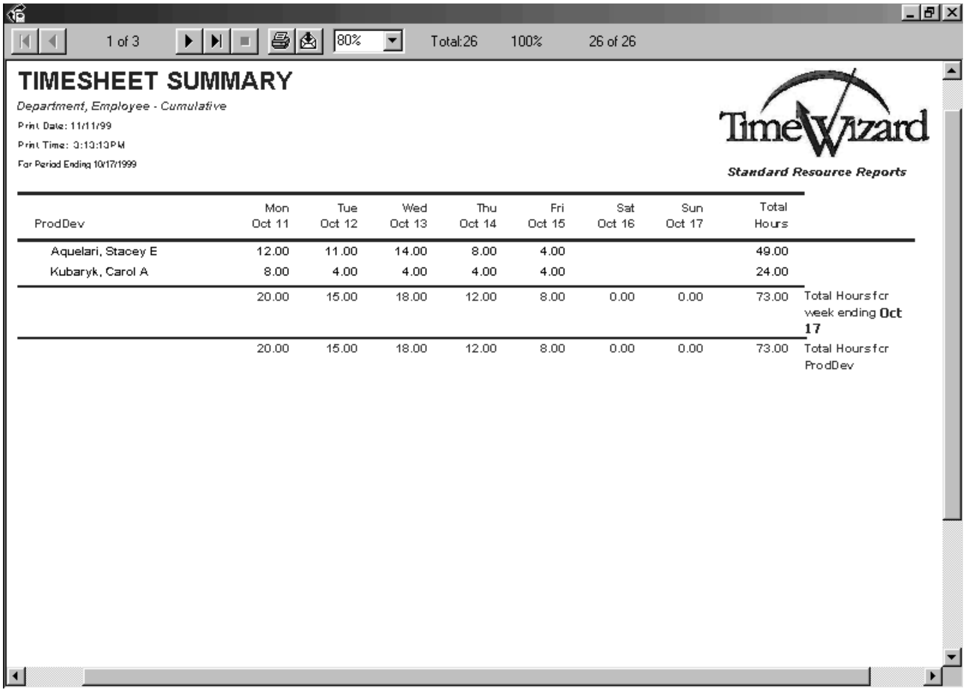
Report Name: Timesheet Summary

Report Categories: Administrator, Department Owner, Financial

Description: This report displays all assignments and associated transactions on the timesheet for the selected period_enddate.

This report will ONLY return rows for employees who have entered time in the selected period.

Report File Name	TimSht (Ora or SQL).rpt
Parameters Used	Report Grouping, Activity Description, departments_owned, empid, period_enddates, act_ukey1, act_ukey2, act_ukey3, act_ukey4
Query (select)	"SECURITY_PROFILE"."FULLNAME", "SECURITY_PROFILE"."DEPT_CODE", "TRANSACTIONS"."TRANS_DATE", "TRANSACTIONS"."TRANS_TYPE", "TRANSACTIONS"."PERIOD_ENDING", "TRANSACTIONS"."TRANS_HOURS", "ACTIVITIES"."ACT_UKEY1", "ACTIVITIES"."ACT_UKEY2", "ACTIVITIES"."ACT_UKEY3", "ACTIVITIES"."ACT_UKEY4"
Query (from)	"SECURITY_PROFILE" "SECURITY_PROFILE", "TRANSACTIONS" "TRANSACTIONS", "ACTIVITIES" "ACTIVITIES"
Query (Where)	"SECURITY_PROFILE"."EMP_ID" = "TRANSACTIONS"."EMP_ID"
Query (And)	"TRANSACTIONS"."ACTIVITY_ID" = "ACTIVITIES"."ACTIVITY_ID"



1 of 3 | 80% | Total:26 | 100% | 26 of 26

TIMESHEET SUMMARY

Department, Employee - Cumulative

Print Date: 11/11/99

Print Time: 3:13:13PM

For Period Ending 10/17/1999

TimeWizard

Standard Resource Reports

ProdDev	Mon Oct 11	Tue Oct 12	Wed Oct 13	Thu Oct 14	Fri Oct 15	Sat Oct 16	Sun Oct 17	Total Hours	
Aquelari, Stacey E	12.00	11.00	14.00	8.00	4.00			49.00	
Kubaryk, Carol A	8.00	4.00	4.00	4.00	4.00			24.00	
	20.00	15.00	18.00	12.00	8.00	0.00	0.00	73.00	Total Hours for week ending **Oct 17**
	20.00	15.00	18.00	12.00	8.00	0.00	0.00	73.00	Total Hours for ProdDev

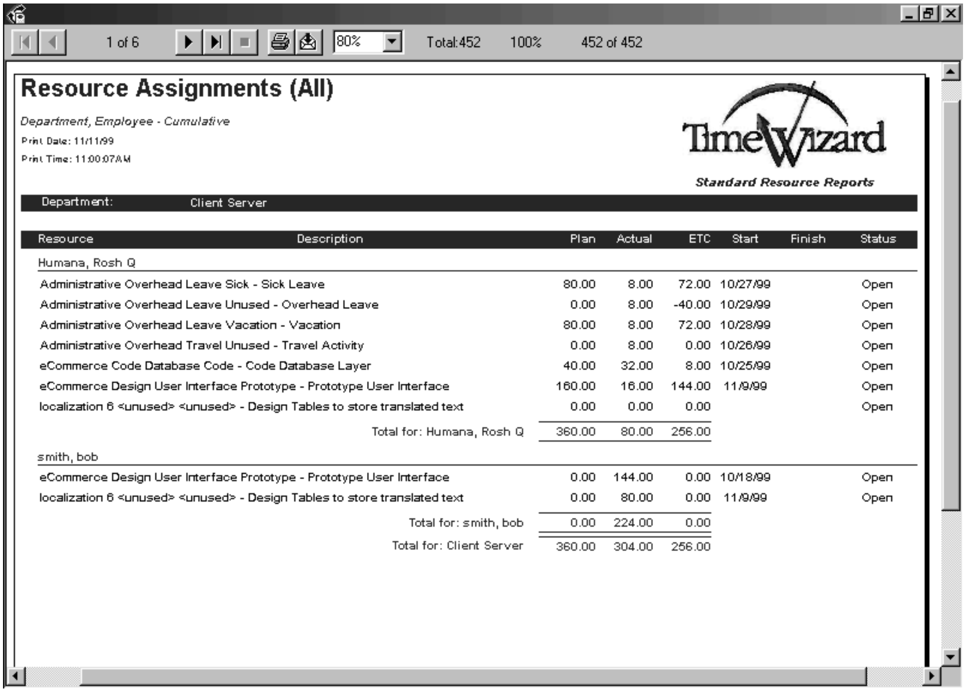
Report Name: Resource Assignments

Report Caregories: Department Owner, Activity Owner

Description: This report contains two reports in one. Both versions let the user choose the fields that comprise the activity description. The description can consist of one or more of the activity key fields and is selected by setting the Activity Description parameter. Both versions let the user select whether to display Open, Closed, or All assignments by changing the value of the Assignment Status parameter to “O,” “C” or “A” respectively. The default value of Assignment Status is “O.”

The value of the Report Type parameter is used to determine whether the report is of an activity owner or a department owner.

Report File Name	ResAsn (Ora or SQL).rpt
Parameters Used	Report Type, Assignment Status, Activity Description, departments_owned, empid, act_ukey1, act_ukey2, act_ukey3, act_ukey4
Query (select)	"ASSIGNMENTS"."RES_AS", "ASSIGNMENTS"."RES_AF", "ASSIGNMENTS"."ETC_HRS", "ASSIGNMENTS"."REC_STATUS", "ASSIGNMENTS"."PLAN_HRS", "SECURITY_PROFILE"."FULLNAME", "SECURITY_PROFILE"."DEPT_CODE", "TRANSACTIONS"."TRANS_TYPE", "TRANSACTIONS"."TRANS_HOURS", "ACTIVITIES"."ACT_UKEY1", "ACTIVITIES"."ACT_UKEY2", "ACTIVITIES"."ACT_UKEY3", "ACTIVITIES"."ACT_UKEY4", "ACTIVITIES"."DESCRIPTION", "ACTIVITY_OWNER"."APPROVER_ID", "SECURITY_PROFILE1"."FULLNAME"
Query (from)	"ASSIGNMENTS" "ASSIGNMENTS", "SECURITY_PROFILE" "SECURITY_PROFILE", "TRANSACTIONS" "TRANSACTIONS", "ACTIVITIES" "ACTIVITIES", "ACTIVITY_OWNER" "ACTIVITY_OWNER", "SECURITY_PROFILE" "SECURITY_PROFILE1"
Query (Where)	"ASSIGNMENTS"."EMP_ID" = "SECURITY_PROFILE"."EMP_ID" AND "ASSIGNMENTS"."EMP_ID" = "TRANSACTIONS"."EMP_ID" AND "ASSIGNMENTS"."ACTIVITY_ID" = "TRANSACTIONS"."ACTIVITY_ID"
Query (And)	"ASSIGNMENTS"."ACTIVITY_ID" = "ACTIVITY_OWNER"."ACTIVITY_ID"(+) AND "ACTIVITY_OWNER"."APPROVER_ID" = "SECURITY_PROFILE1"."EMP_ID"(+)



1 of 6 80% Total:452 100% 452 of 452

Resource Assignments (All)

Department, Employee - Cumulative

Print Date: 11/11/99

Print Time: 11:00:07AM

TimeWizard

Standard Resource Reports

Department: Client Server

Resource	Description	Plan	Actual	ETC	Start	Finish	Status
Humana, Rosh Q							
Administrative Overhead Leave Sick - Sick Leave		80.00	8.00	72.00	10/27/99		Open
Administrative Overhead Leave Unused - Overhead Leave		0.00	8.00	-40.00	10/29/99		Open
Administrative Overhead Leave Vacation - Vacation		80.00	8.00	72.00	10/28/99		Open
Administrative Overhead Travel Unused - Travel Activity		0.00	8.00	0.00	10/26/99		Open
eCommerce Code Database Code - Code Database Layer		40.00	32.00	8.00	10/25/99		Open
eCommerce Design User Interface Prototype - Prototype User Interface		160.00	16.00	144.00	11/9/99		Open
localization 6 <unused> <unused> - Design Tables to store translated text		0.00	0.00	0.00			Open
	Total for: Humana, Rosh Q	360.00	80.00	256.00			
smith, bob							
eCommerce Design User Interface Prototype - Prototype User Interface		0.00	144.00	0.00	10/18/99		Open
localization 6 <unused> <unused> - Design Tables to store translated text		0.00	80.00	0.00	11/9/99		Open
	Total for: smith, bob	0.00	224.00	0.00			
	Total for: Client Server	360.00	304.00	256.00			

The report will display the following information for every assignment: Planned Hours, Actual Hours, ETC (Estimated Time to Complete), Start (Resource Actual Start from the assignment), Finish (Resource Actual Finish from the assignment), Status (whether the assignment is Open or Closed)

If Report Type is "P" (Default), the report will be an activity owner report. The report will display all of the activities owned by the user running the report (the value of the empid parameter), and all of the assignments for each activity. The departments owned field is ignored.

If Report Type is "D," the report will be a department owner report. The report will display all of the employees by department (for the departments selected using the departments_owned parameter). The user can select more than one department. The report will also display all of the assignments (based on the Assignment Status parameter) for each employee.

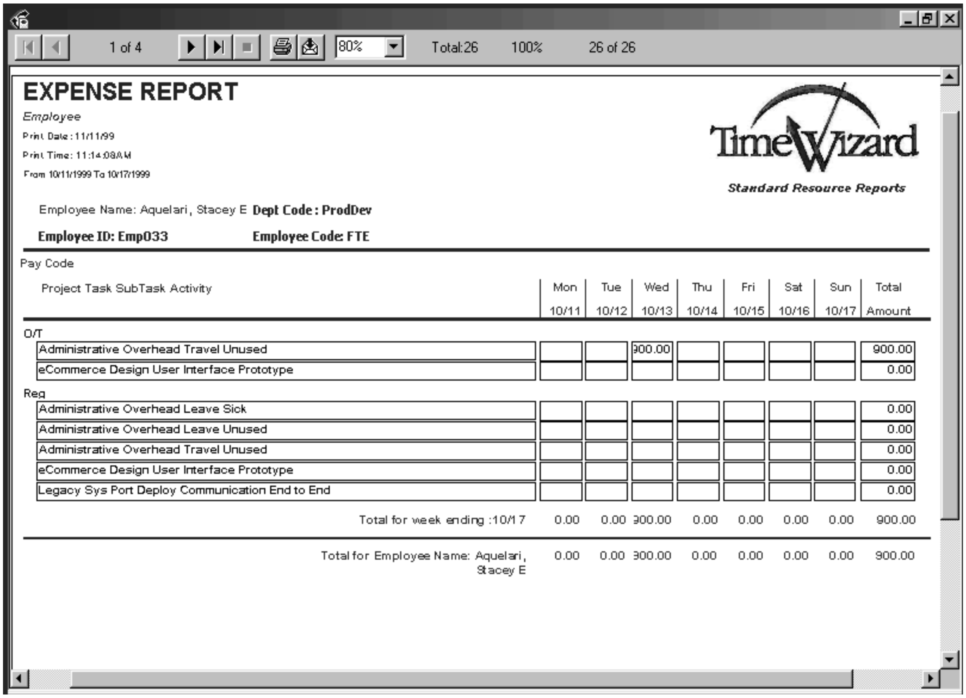
Report Name: Expense Report

Report Categories: Department Owner, Financial

Description: This report displays a standard expense report for users who have entered expense amounts into the Special Amount field associated with a detail code.

The user can select which combination of the four activity keys best describes the activity and which detail code contains the Expense Categories. Department owners can select which departments to include in the report. Otherwise the report will return the records for the current user.

Report File Name	Exp (Ora or SQL).rpt
Parameters Used	Activity Description, Expense Code, empid, period_enddates, departments_owned, act_ukey1, act_ukey2, act_ukey3, act_ukey4, trans_ukey1, trans_ukey2, trans_ukey3, trans_ukey4, trans_ukey5, trans_ukey6, trans_ukey7, trans_ukey8, trans_ukey9, trans_ukey10
Query (select)	"SECURITY_PROFILE"."EMP_ID", "SECURITY_PROFILE"."EMP_ID_USER", "SECURITY_PROFILE"."FULLNAME", "SECURITY_PROFILE"."DEPT_CODE", "SECURITY_PROFILE"."EMP_CODE", "TRANSACTIONS"."TRANS_DATE", "TRANSACTIONS"."TRANS_TYPE", "TRANSACTIONS"."PERIOD_ENDING", "TRANSACTIONS"."SPECIAL_AMT", "TRANSACTIONS"."TRANS_UKEY1", "TRANSACTIONS"."TRANS_UKEY2", "TRANSACTIONS"."TRANS_UKEY3", "TRANSACTIONS"."TRANS_UKEY4", "TRANSACTIONS"."TRANS_UKEY5", "TRANSACTIONS"."TRANS_UKEY6", "TRANSACTIONS"."TRANS_UKEY7", "TRANSACTIONS"."TRANS_UKEY8", "TRANSACTIONS"."TRANS_UKEY9", "TRANSACTIONS"."TRANS_UKEY10", "ACTIVITIES"."ACT_UKEY1", "ACTIVITIES"."ACT_UKEY2", "ACTIVITIES"."ACT_UKEY3", "ACTIVITIES"."ACT_UKEY4"
Query (from)	"SECURITY_PROFILE" "SECURITY_PROFILE", "TRANSACTIONS" "TRANSACTIONS", "ACTIVITIES" "ACTIVITIES"
Query (Where)	"SECURITY_PROFILE"."EMP_ID" = "TRANSACTIONS"."EMP_ID"
Query (And)	"TRANSACTIONS"."ACTIVITY_ID" = "ACTIVITIES"."ACTIVITY_ID"


1 of 4 80% Total:26 100% 26 of 26

EXPENSE REPORT

Employee

Print Date: 11/11/99

Print Time: 11:14:08AM

From 10/11/1999 To 10/17/1999

Employee Name: Aquelari, Stacey E **Dept Code: ProdDev**

Employee ID: Emp033 **Employee Code: FTE**

Pay Code

Project Task SubTask Activity	Mon 10/11	Tue 10/12	Wed 10/13	Thu 10/14	Fri 10/15	Sat 10/16	Sun 10/17	Total Amount
O/T								
Administrative Overhead Travel Unused			900.00					900.00
eCommerce Design User Interface Prototype								0.00
Reg								
Administrative Overhead Leave Sick								0.00
Administrative Overhead Leave Unused								0.00
Administrative Overhead Travel Unused								0.00
eCommerce Design User Interface Prototype								0.00
Legacy Sys Port Deploy Communication End to End								0.00
Total for week ending :10/17	0.00	0.00	900.00	0.00	0.00	0.00	0.00	900.00
Total for Employee Name: Aquelari, Stacey E	0.00	0.00	900.00	0.00	0.00	0.00	0.00	900.00

Report Name: Pie Chart

Report Categories: Department Owner = DO = Pie Chart for Department Owners

Activity Owner = PM = Pie Chart for Activity Owner

Financial = Both

Description: This report returns a pie graph for each department selected by the departments_owned parameter. The graph represents different activities for which time was charged during the period selected. The right-hand side of the report displays a list of the activities, the percentage of the total time charged to that activity, and the total hours charged to that activity. The top line will display the department and the total hours for the period for that department.

Report File Name	PieCht (Ora or SQL).rpt
Parameters Used	Report Grouping, Activity Description, period_enddates, departments_owned, empid, act_ukey1, act_ukey2, act_ukey3, act_ukey4
Query (select)	"SECURITY_PROFILE"."DEPT_CODE", "TRANSACTIONS"."TRANS_TYPE", "TRANSACTIONS"."PERIOD_ENDING", "TRANSACTIONS"."TRANS_HOURS", "ACTIVITIES"."ACT_UKEY1", "ACTIVITIES"."ACT_UKEY2", "ACTIVITIES"."ACT_UKEY3", "ACTIVITIES"."ACT_UKEY4"
Query (from)	"SECURITY_PROFILE" "SECURITY_PROFILE", " "TRANSACTIONS" "TRANSACTIONS", "ACTIVITIES" "ACTIVITIES"
Query (Where)	"SECURITY_PROFILE"."EMP_ID" = "TRANSACTIONS"."EMP_ID"
Query (And)	"TRANSACTIONS"."ACTIVITY_ID" = "ACTIVITIES"."ACTIVITY_ID"

RESOURCE UTILIZATION PIE CHART

Department, Project No. - Cumulative

Print Date: 1/12/01

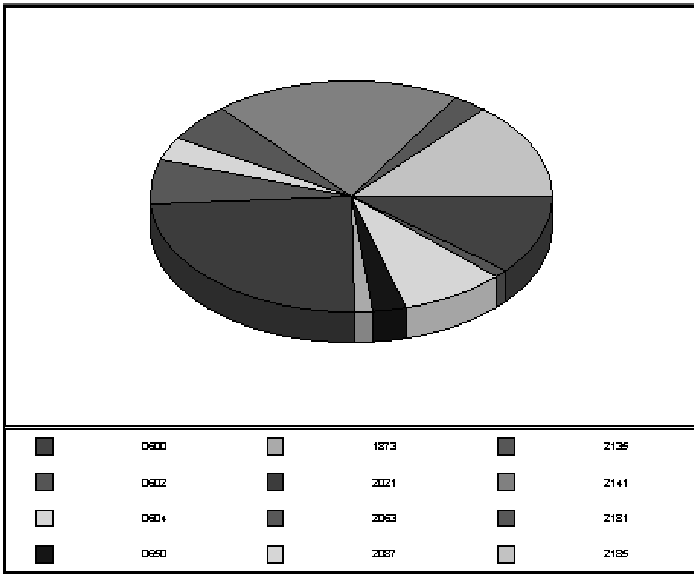
Print Time: 10:56:48 AM

For Periods Ending between 11/1/00 and 11/30/00

TimeWizard

Standard Resource Reports

CSTR Total Hours: 288.00



Project No.	Percent	Hours
0600	11.11%	32.00
0602	1.04%	3.00
0604	8.33%	24.00
0650	2.78%	8.00
1873	1.39%	4.00
2021	24.31%	70.00
2063	6.25%	18.00
2087	3.13%	9.00
2135	5.56%	16.00
2141	19.79%	57.00
2181	2.78%	8.00
2185	13.54%	39.00

4

Report Name: Resource Utilization Bar Chart

Report Categories: Department Owner = DO = Bar Chart for Department Owners

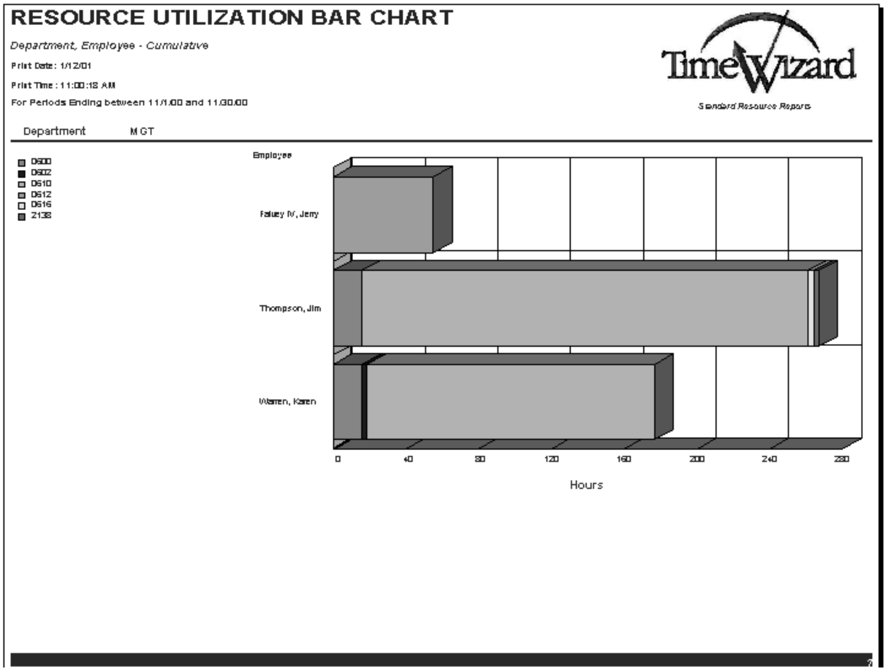
Activity Owner = PM = Bar Chart for Activity Owners

Financial = Both

Description: Both the department owner and the activity owner use a similar report. The formula "Report Type" determines whether the report will display a department owner report or an activity owner report.

The department owner report shows a stacked bar for each employee with each element of the stack indicating a different project. When this report is run by a department owner, it will display each department's data on a separate page.

Report File Name	BarCht (Ora or SQL).rpt
Parameters Used	Report Type, Activity Description, period_enddates, empid, departments_owned, act_ukey1, act_ukey2, act_ukey3, act_ukey4
Query (select)	"SECURITY_PROFILE"."FULLNAME", "SECURITY_PROFILE"."DEPT_CODE", "TRANSACTIONS"."TRANS_TYPE", "TRANSACTIONS"."PERIOD_ENDING", "TRANSACTIONS"."TRANS_HOURS", "TRANSACTIONS"."SPECIAL_AMT", "ACTIVITIES"."ACTIVITY_ID", "ACTIVITIES"."ACT_UKEY1", "ACTIVITIES"."ACT_UKEY2", "ACTIVITIES"."ACT_UKEY3", "ACTIVITIES"."ACT_UKEY4", "ACTIVITY_OWNER"."APPROVER_ID", "SECURITY_PROFILE1"."FULLNAME"
Query (from)	"SECURITY_PROFILE" "SECURITY_PROFILE", " "TRANSACTIONS" "TRANSACTIONS", "ACTIVITIES" "ACTIVITIES", "ACTIVITY_OWNER" "ACTIVITY_OWNER", "SECURITY_PROFILE" "SECURITY_PROFILE1"
Query (Where)	"SECURITY_PROFILE"."EMP_ID" = "TRANSACTIONS"."EMP_ID"
Query (And)	"TRANSACTIONS"."ACTIVITY_ID" = "ACTIVITIES"."ACTIVITY_ID"
Query (And)	"ACTIVITIES"."ACTIVITY_ID" = "ACTIVITY_OWNER"."ACTIVITY_ID"(+) AND "ACTIVITY_OWNER"."APPROVER_ID" = "SECURITY_PROFILE1"."EMP_ID"(+)



The activity owner report will show a stacked bar for each project, with each element of the stack indicating a different department.

Report Name: Timesheet Report

Report Categories: Department Owner, Timesheet User

Description: This report displays the assignments with associated transactions on the timesheet for the selected period_enddate.

The timesheet for the current user is displayed unless the TimesheetDOXXX report is run. A department owner can print the timesheets of the employees in his or her department.

Report File Name	Timesheet (Ora or SQL).rpt
Parameters Used	Empid, period_enddates, act_ukey1, act_ukey2, act_ukey3, act_ukey4
Query (select)	"SECURITY_PROFILE"."EMP_ID", "SECURITY_PROFILE"."EMP_ID_USER", "SECURITY_PROFILE"."FULLNAME", "SECURITY_PROFILE"."DEPT_CODE", "SECURITY_PROFILE"."EMP_CODE", "TRANSACTIONS"."TRANS_DATE", "TRANSACTIONS"."TRANS_TYPE", "TRANSACTIONS"."PERIOD_ENDING", "TRANSACTIONS"."TRANS_HOURS", "TRANSACTIONS"."TRANS_UKEY1", "ACTIVITIES"."ACT_UKEY1", "ACTIVITIES"."ACT_UKEY2", "ACTIVITIES"."ACT_UKEY3", "ACTIVITIES"."ACT_UKEY4", "ACTIVITIES"."DESCRIPTION"
Query (from)	"SECURITY_PROFILE" "SECURITY_PROFILE", "TRANSACTIONS" "TRANSACTIONS", "ACTIVITIES" "ACTIVITIES"
Query (Where)	"SECURITY_PROFILE"."EMP_ID" = "TRANSACTIONS"."EMP_ID"
Query (And)	"TRANSACTIONS"."ACTIVITY_ID" = "ACTIVITIES"."ACTIVITY_ID"
Query (And)	"TRANSACTIONS"."TRANS_TYPE" = 1.

TIMESHEET REPORT

Employee

Print Date: 1/23/01

Print Time: 7:44:27 AM

For Period Ending 1/31/01

TimeWizard

Standard Resource Reports

Employee Name: Accord, Cindy | Dept Code : BDEV | Total Hours for Period: 27.50

Employee ID: 0016 | Employee Code: VEEP

Resource Description	Project No.	Task No.	Dept No.	Location	Mon Jan 01	Tue Jan 02	Wed Jan 03	Thu Jan 04	Fri Jan 05	Sat Jan 06	Sun Jan 07	Total Hours
<unclassified> Holiday Pay	D600	□□□										
□□ R							4.50	3.00	7.00			14.50
<unclassified> Snow Days	D606	□□□										
□□ R											2.00	2.00
<unclassified> Overhead	D610	□□□										
□□ R										3.00		3.00
<unclassified> In-House Meetings	D616	□□□										
□□ R									4.00			4.00
<unclassified> Marketing Labor	D650	□□□										
□□ R							4.00					4.00
					0.00	0.00	8.50	3.00	11.00	3.00	2.00	27.50

Total Hours for Period: 27.50

1

Report Name: Missing Timesheet

Report Categories: TimeWizard Administrator, Department Owner

Description: This report displays timesheets that are ""missing"" (where ""missing"" is a user-defined threshold, e.g., 1 hour). If this report is grouped by department, it will return records for all associated employees for the selected period_enddate. If this report is run by an employee who does not own departments, it will return the record for that user for the selected period_enddate.

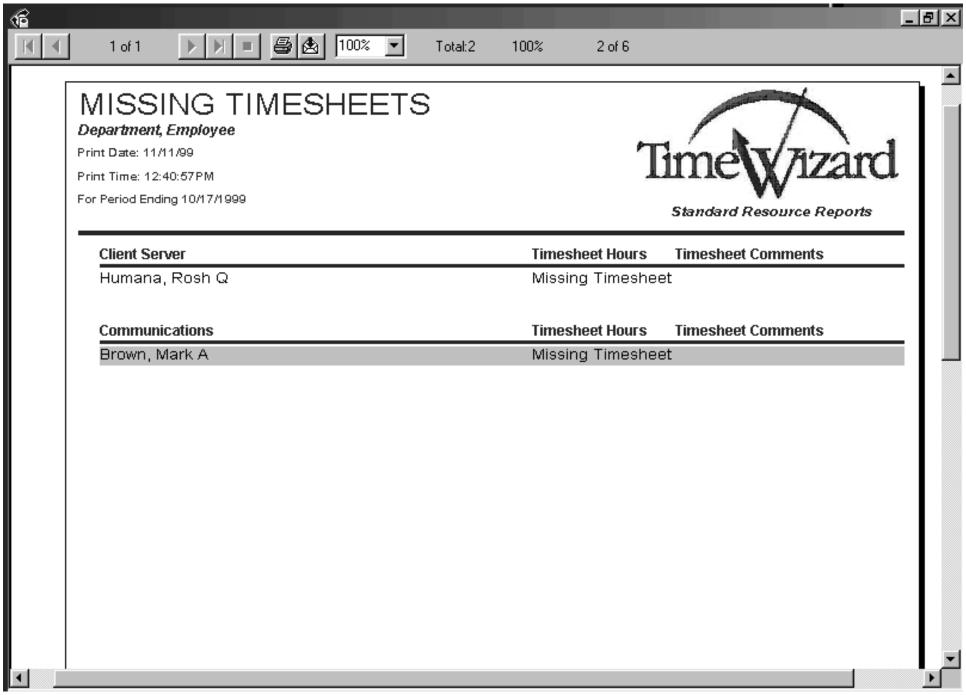
The script to create the view is as follows:

ORACLE: create or replace view TW_V_TRNSTOT as select PERIOD_ENDING, EMP_ID, SUM(TRANS_HOURS) TRANSTOTAL from TRANSACTIONS where TRANS_TYPE = 1 group by PERIOD_ENDING, EMP_ID

SQL SERVER: create view TW_V_TRNSTOT as select PERIOD_ENDING, EMP_ID, SUM(TRANS_HOURS) TRANSTOTAL from TRANSACTIONS where TRANS_TYPE = 1 group by PERIOD_ENDING, EMP_ID

The user has the option of adjusting the “missing timesheet” threshold. All records which have a transactions hours summary of the selected period LESS THAN the Missing Timesheet Hours Threshold parameter will display “Missing Timesheet” in the Timesheet Status field. If the user is displaying the Missing Timesheet report, only those records will be displayed.

Report File Name	MisTim (Ora or SQL).rpt
Parameters Used	Report Type, period_enddates, departments_owned, Missing Timesheet, Hours Threshold, empid
Query (select)	"TIMESHEET"."PERIOD_ENDING", "TIMESHEET"."EMP_ID", "TIMESHEET"."APPROVAL_STATE", "TIMESHEET"."TS_COMMENTS", "SECURITY_PROFILE"."FULLNAME", "SECURITY_PROFILE"."DEPT_CODE", "TW_V_TRNSTOT"."TRANSTOTAL"
Query (from)	"TIMESHEET" "TIMESHEET", " "SECURITY_PROFILE" "SECURITY_PROFILE", "TW_V_TRNSTOT" "TW_V_TRNSTOT"
Query (Where)	"TIMESHEET"."EMP_ID" = "SECURITY_PROFILE"."EMP_ID" AND "TIMESHEET"."PERIOD_ENDING" = "TW_V_TRNSTOT"."PERIOD_ENDING"(+)
Query (And)	"TIMESHEET"."EMP_ID" = "TW_V_TRNSTOT"."EMP_ID"(+)

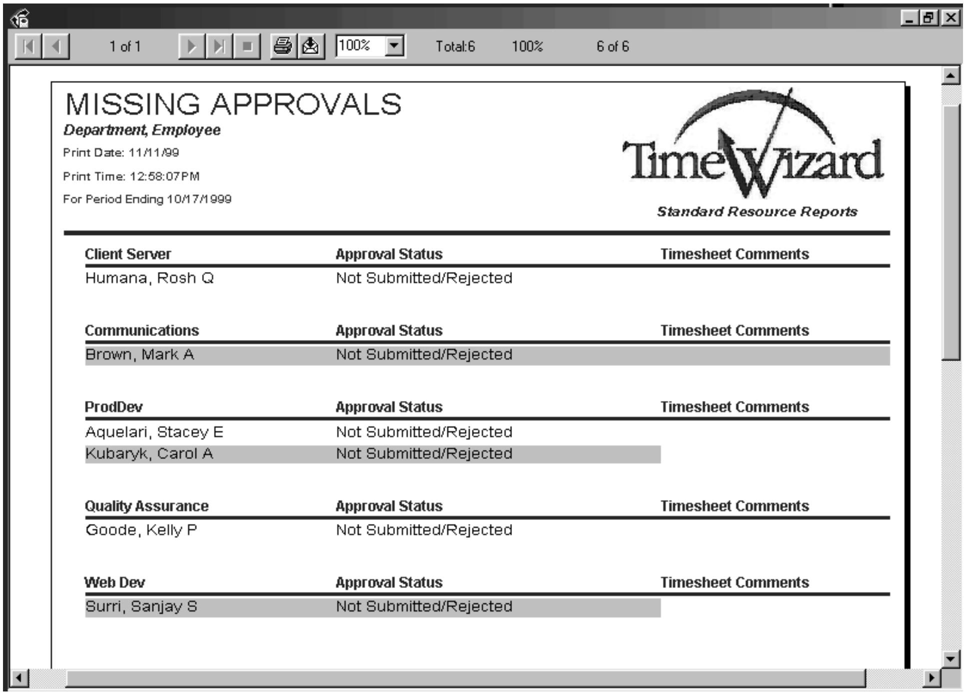

1 of 1
100%
Total:2
100%
2 of 6
MISSING TIMESHEETS
Department, Employee
Print Date: 11/11/99
Print Time: 12:40:57PM
For Period Ending 10/17/1999
TimeWizard
Standard Resource Reports
Client Server
Timesheet Hours
Timesheet Comments
Humana, Rosh Q
Missing Timesheet
Communications
Timesheet Hours
Timesheet Comments
Brown, Mark A
Missing Timesheet

Report Name: Missing Approvals

Report Categories: TimeWizard Administrator, Department Owner

Description: This report displays timesheets that have not completed the approval process. If this report is grouped by department, it will return records for all associated employees for the selected period_enddate. If this report is run by an employee who is not a department owner, it will return the record for that user for the selected period_enddate.

Report File Name	MisApp (Ora or SQL).rpt
Parameters Used	period_enddates, departments_owned, Missing Timesheet Hours Threshold, empid
Query (select)	"TIMESHEET"."PERIOD_ENDING", "TIMESHEET"."EMP_ID", "TIMESHEET"."APPROVAL_STATE", "TIMESHEET"."TS_COMMENTS", "SECURITY_PROFILE"."FULLNAME", "SECURITY_PROFILE"."DEPT_CODE", "TW_V_TRNSTOT"."TRANSTOTAL"
Query (from)	"TIMESHEET TIMESHEET", "SECURITY_PROFILE" "SECURITY_PROFILE", "TW_V_TRNSTOT" "TW_V_TRNSTOT"
Query (Where)	"TIMESHEET"."EMP_ID" = "SECURITY_PROFILE"."EMP_ID" AND "TIMESHEET"."PERIOD_ENDING" *= "TW_V_TRNSTOT"."PERIOD_ENDING" AND "TIMESHEET"."EMP_ID" * = "TW_V_TRNSTOT"."EMP_ID" AND "TIMESHEET"."PERIOD_ENDING" >= "Oct 28 1999 00:00:00AM" AND "TIMESHEET"."PERIOD_ENDING" < Oct 29 1999 00:00:00AM"



1 of 1 100% Total:6 100% 6 of 6

MISSING APPROVALS

Department, Employee

Print Date: 11/11/99

Print Time: 12:58:07PM

For Period Ending 10/17/1999

TimeWizard

Standard Resource Reports

Client Server	Approval Status	Timesheet Comments
Humana, Rosh Q	Not Submitted/Rejected	

Communications	Approval Status	Timesheet Comments
Brown, Mark A	Not Submitted/Rejected	

ProdDev	Approval Status	Timesheet Comments
Aquelari, Stacey E	Not Submitted/Rejected	
Kubaryk, Carol A	Not Submitted/Rejected	

Quality Assurance	Approval Status	Timesheet Comments
Goode, Kelly P	Not Submitted/Rejected	

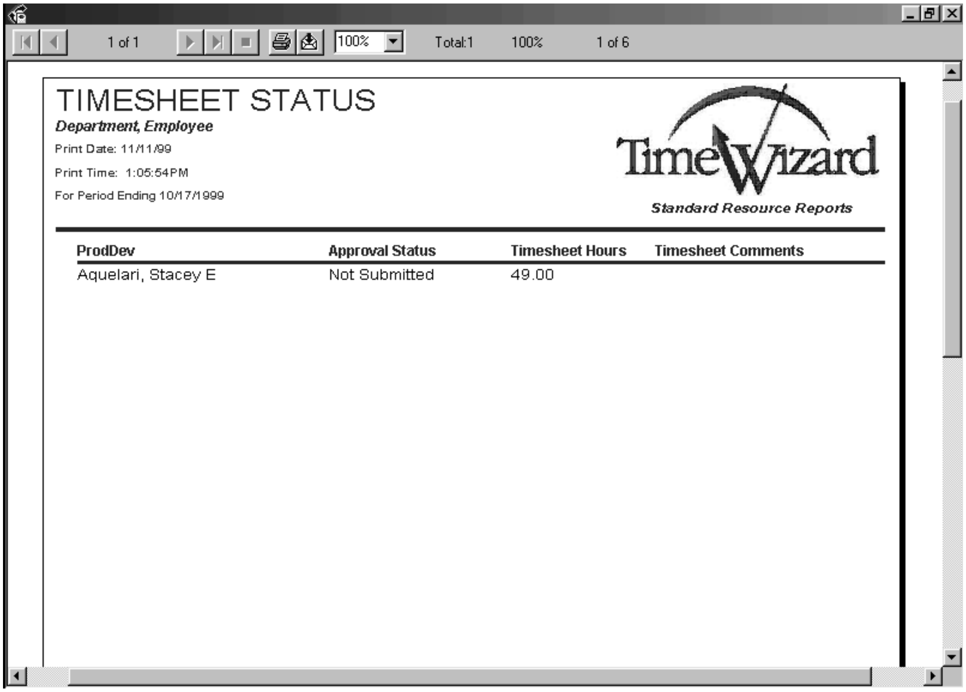
Web Dev	Approval Status	Timesheet Comments
Surri, Sanjay S	Not Submitted/Rejected	

Report Name: Timesheet Status

Report Categories: TimeWizard Administrator, Department Owner

Description: This report displays the timesheet approval status (i.e., Not Submitted, Approved, Rejected, or Unapproved) for a list of employees grouped by department for the selected period_enddate. If this report is run by an employee who is not a department owner, then the report displays the timesheet approval status for that user for the selected period_enddate.

Report File Name	TimSta (Ora or SQL).rpt
Parameters Used	Report Type, period_enddates, departments_owned, Missing Timesheet Hours Threshold, empid
Query (select)	"TIMESHEET"."PERIOD_ENDING", "TIMESHEET"."EMP_ID", "TIMESHEET"."APPROVAL_STATE", "TIMESHEET"."TS_COMMENTS", "SECURITY_PROFILE"."FULLNAME", "SECURITY_PROFILE"."DEPT_CODE", "TW_V_TRNSTOT"."TRANSTOTAL"
Query (from)	"TIMESHEET TIMESHEET", "SECURITY_PROFILE" "SECURITY_PROFILE", "TW_V_TRNSTOT" "TW_V_TRNSTOT"
Query (Where)	"TIMESHEET"."EMP_ID" = "SECURITY_PROFILE"."EMP_ID" AND "TIMESHEET"."PERIOD_ENDING" *= "TW_V_TRNSTOT"."PERIOD_ENDING" AND "TIMESHEET"."EMP_ID" * = "TW_V_TRNSTOT"."EMP_ID" AND "TIMESHEET"."PERIOD_ENDING" >= "Oct 28 1999 00:00:00AM" AND "TIMESHEET"."PERIOD_ENDING" < Oct 29 1999 00:00:00AM"

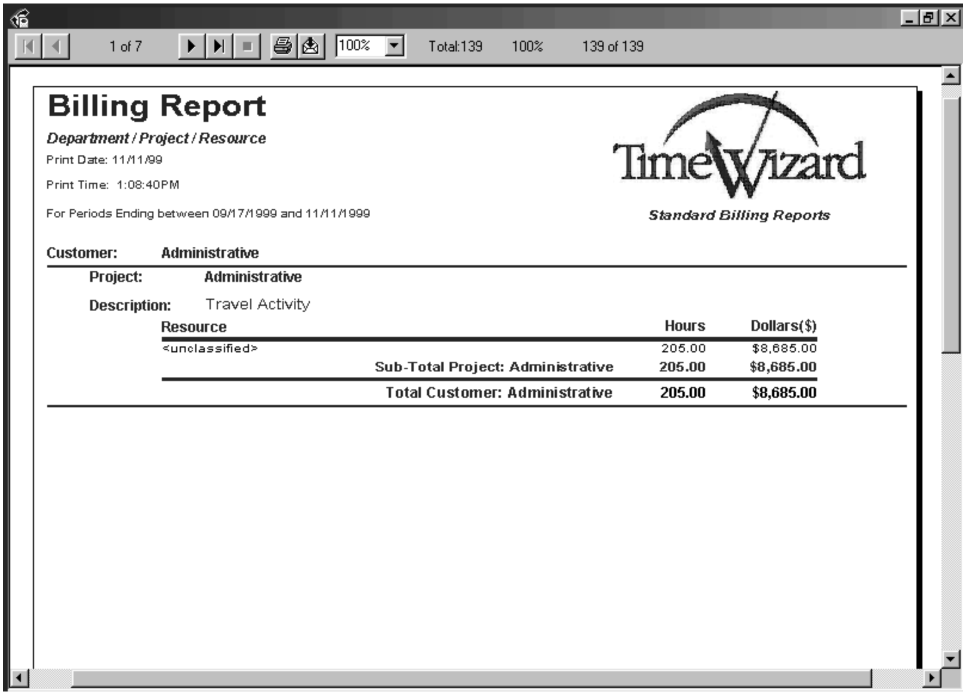

1 of 1
100%
Total:1
100%
1 of 6
TIMESHEET STATUS
Department, Employee
Print Date: 11/11/99
Print Time: 1:05:54PM
For Period Ending 10/17/1999
TimeWizard
Standard Resource Reports
ProdDev
Approval Status
Timesheet Hours
Timesheet Comments
Aquelari, Stacey E
Not Submitted
49.00

Report Name: Billing Report

Report Categories: Financial

Description: This report allows the user to specify which activity fields are the Customer field and Project field. The user also specifies whether to group the summary by Employee or by Resource code. The user can specify the date range for the report. The dollar amounts are calculated from the hourly rate (Rate 1 or Rate 2) + special amount for each transaction, then summed.

Report File Name	BilSum (Ora or SQL).rpt
Parameters Used	Customer, Resource Category, Rate, period_enddates, Project, act_ukey1, act_ukey2, act_ukey3, act_ukey4, act_unonk1, act_unonk2, act_unonk3, act_unonk4, act_unonk5, act_unonk6, act_unonk7, act_unonk8, act_unonk9, act_unonk10
Query (select)	"TRANSACTIONS"."TRANS_DATE", "TRANSACTIONS"."TRANS_TYPE", "TRANSACTIONS"."PERIOD_ENDING", "TRANSACTIONS"."TRANS_HOURS", "TRANSACTIONS"."SPECIAL_AMT", "TRANSACTIONS"."RATE1", "TRANSACTIONS"."RATE2", "SECURITY_PROFILE"."FULLNAME", "TWRESOURCE"."NAME", "ACTIVITIES"."ACT_UKEY1", "ACTIVITIES"."ACT_UKEY2", "ACTIVITIES"."ACT_UKEY3", "ACTIVITIES"."ACT_UKEY4", "ACTIVITIES"."ACT_UNONK1", "ACTIVITIES"."ACT_UNONK2", "ACTIVITIES"."ACT_UNONK3", "ACTIVITIES"."ACT_UNONK4", "ACTIVITIES"."ACT_UNONK5", "ACTIVITIES"."ACT_UNONK6", "ACTIVITIES"."ACT_UNONK7", "ACTIVITIES"."ACT_UNONK8", "ACTIVITIES"."ACT_UNONK9", "ACTIVITIES"."ACT_UNONK10", "ACTIVITIES"."DESCRIPTION"
Query (from)	"TRANSACTIONS" "TRANSACTIONS", "SECURITY_PROFILE" "SECURITY_PROFILE", "TWRESOURCE" "TWRESOURCE", "ACTIVITIES" "ACTIVITIES"
Query (Where)	"TRANSACTIONS"."EMP_ID" = "SECURITY_PROFILE"."EMP_ID"
Query (And)	"TRANSACTIONS"."RESOURCE_ID" =
Query (And)	"TRANSACTIONS"."ACTIVITY_ID" = "ACTIVITIES"."ACTIVITY_ID"



Billing Report

Department / Project / Resource

Print Date: 11/11/99

Print Time: 1:08:40PM

For Periods Ending between 09/17/1999 and 11/11/1999

TimeWizard

Standard Billing Reports

Customer: **Administrative**

Project: **Administrative**

Description: Travel Activity

Resource		Hours	Dollars($)
<unclassified>		205.00	$8,685.00
	Sub-Total Project: Administrative	**205.00**	**$8,685.00**
	Total Customer: Administrative	**205.00**	**$8,685.00**

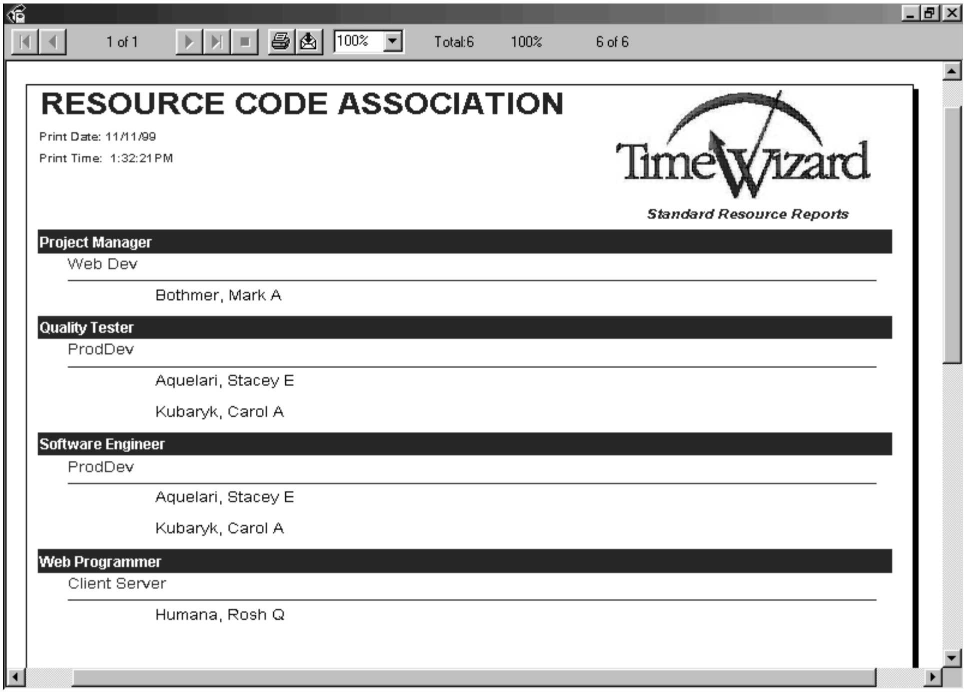
Report Name: Resource Code Associations

Report Categories: TimeWizard Administrator, Department Owner

Description: This report lists all employees associated with specific resource codes, grouped by department.

Report File Name	ResAsnDO(SQL or ORA).rpt
Parameters Used	Assignment status, activity description, departments_owned
Query(select)	assignments.res_as, assignments.res_af, assignments.etc_hrs, assignments.rec_status, assignments.plan_hrs, security_profile.fullname, security_profile.dept_lowest, transactions.trans_type, transactions.correct_status, transactions.trans_hours, activities.act_ukey1, activities.act_ukey2, activities.act_ukey3, activities.act_ukey4, activities.description

Query (from)	((((assignments as assignments INNER JOIN security_profile as security_profile ON assignments.emp_id = security_profile.emp_id) INNER JOIN transactions as transactions ON (assignments.activity_id = transactions.activity_id) AND (assignments.emp_id = transactions.emp_id) AND (assignments.resource_id = transactions.resource_id)) INNER JOIN activities as activities ON assignments.activity_id = activities.activity_id) LEFT JOIN activity_owner as activity_owner ON assignments.activity_id = activity_owner.activity_id) LEFT JOIN security_profile AS security_profile1 ON activity_owner.approver_id = security_profile1.emp_id
Query (Where)	assignments.emp_id = security_profile.emp_id
Query (And)	assignments.emp_id = transactions.emp_id AND assignments.resource_id = transactions.resource_id AND assignments.activity_id = transactions.activity_id AND assignments.activity_id = activities.activity_id



RESOURCE CODE ASSOCIATION

Print Date: 11/11/99

Print Time: 1:32:21 PM

Project Manager

Web Dev

Bothmer, Mark A

Quality Tester

ProdDev

Aquelari, Stacey E

Kubaryk, Carol A

Software Engineer

ProdDev

Aquelari, Stacey E

Kubaryk, Carol A

Web Programmer

Client Server

Humana, Rosh Q

Report Name: Timesheet Audit Report

Report Categories: TimeWizard Administrator

Description: This report displays all time entries and edits made to an employee's timesheet within a selected period. This will allow an administrator to monitor all entries and edits made to an employee's timesheet.

Report File Name	Audit (SQL or ORA).rpt
Parameters Used	period_enddate, departments_owned
Query (select)	security_profile.emp_id_user, security_profile.fullname, security_profile.dept_code, security_profile.dept_lowest, security_profile.emp_code, security_profile.salary_code, transactions.trans_date, transactions.period_ending, transactions.correct_status, transactions.trans_hours, transactions.last_update, transactions.logid_update, transactions.trans_ukey1, transactions.trans_ukey2, transactions.trans_ukey3, transactions.trans_ukey4, transactions.trans_ukey5, transactions.trans_ukey6, transactions.trans_ukey7, transactions.trans_ukey8, transactions.trans_ukey9, transactions.trans_ukey10, activities.act_ukey1, activities.act_ukey2, activities.act_ukey3, activities.act_ukey4, activities.description, twresource.name
Query (from)	security_profile security_profile, transactions transactions, activities activities, twresource twresource, periods periods
Query (Where)	security_profile.emp_id = transactions.emp_id
Query (And)	transactions.activity_id = activities.activity_id AND transactions.resource_id = twresource.resource_id AND transactions.period_ending = periods.period_ending

TIMESHEET AUDIT

Print Date: 1/12/01
Print Time: 10:34:42 AM
For Period Ending 1/31/01

TimeWizard
Standard Resource Reports

Employee Name: Angelides, Philios | Dept Code : BDEV | Salary Code : 0016

Employee ID: 0016 | Employee Code: VEEP

Resource	Project No.	Task No.	Dept No.	Location
<unclassified> Holiday Pay	0600	000		

TRANS DATE	LOGIN ID	TIME/DATE	STATUS	Labor Code	Cost Type	HOURS
1/3/01	Accord	10:32:52AM 1/12/01	ACTIVE	00	R	4.50
	Accord	10:17:22AM 1/12/01	ORIGINAL	00	R	5.00
	Accord	10:32:44AM 1/12/01	BACKOUT	00	R	-5.00
1/4/01	Accord	10:32:38AM 1/12/01	ACTIVE	00	R	3.00
1/5/01	Accord	10:32:41AM 1/12/01	ACTIVE	00	R	7.00

Resource	Project No.	Task No.
<unclassified> Snow Days	0606	000

TRANS DATE	LOGIN ID	TIME/DATE	STATUS	Labor Code	Cost Type	HOURS
1/7/01	Accord	10:28:42AM 1/12/01	ACTIVE	00	R	2.00

1

APPENDIX B

Custom Field Formula Specifications

All user-defined captions for custom fields are sent to the report automatically at runtime. This is done by replacing the formulas in the report named for the particular field. Table B.1 lists these custom fields and identifies the default settings and field descriptions.

If you write your own custom reports for TimeWizard using Crystal Reports Professional and wish the captions to be sent to the report at runtime rather than hard-coding the values, then you need to create formulas using the field names specified in the following table.

Table B.1: TimeWizard Report Field Settings

Field	Default	Description
act_ukey1	<unused>	Activity Key1
act_ukey2	<unused>	Activity Key2
act_ukey3	<unused>	Activity Key3
act_ukey4	<unused>	Activity Key 4
act_unonk1	<unused>	Non Key Activity Field 1
act_unonk2	<unused>	Non Key Activity Field 2
act_unonk3	<unused>	Non Key Activity Field 3
act_unonk4	<unused>	Non Key Activity Field 4
act_unonk5	<unused>	Non Key Activity Field 5
act_unonk6	<unused>	Non Key Activity Field 6
act_unonk7	<unused>	Non Key Activity Field 7
act_unonk8	<unused>	Non Key Activity Field 8
act_unonk9	<unused>	Non Key Activity Field 9
act_unonk10	<unused>	Non Key Activity Field 10
Trans_ukey1	<unused>	Detail Code 1
Trans_ukey2	<unused>	Detail Code 2
Trans_ukey3	<unused>	Detail Code 3
Trans_ukey4	<unused>	Detail Code 4
Trans_ukey5	<unused>	Detail Code 5
Trans_ukey6	<unused>	Detail Code 6
Trans_ukey7	<unused>	Detail Code 7
Trans_ukey8	<unused>	Detail Code 8
Trans_ukey9	<unused>	Detail Code 9
Trans_ukey10	<unused>	Detail Code 10
Dept_code	Dept. Code	Department Code Field from security_profile
Salary_code	Salary Code	Salary Code Field from security_profile
Emp_code	Emp Code	Employee Code Field from security_profile
Sec_unonk1	<unused>	Non Key Employee Field 1
Sec_unonk2	<unused>	Non Key Employee Field 2
Sec_unonk3	<unused>	Non Key Employee Field 3
Sec_unonk4	<unused>	Non Key Employee Field 4
Sec_unonk5	<unused>	Non Key Employee Field 5
Sec_unonk6	<unused>	Non Key Employee Field 6
Sec_unonk7	<unused>	Non Key Employee Field 7
Sec_unonk8	<unused>	Non Key Employee Field 8
Sec_unonk9	<unused>	Non Key Employee Field 9
Sec_unonk10	<unused>	Non Key Employee Field 10