LaborLogix

TimeWizard.*enterprise*
User's Guide

TimeWizard.*enterprise* ®
User's Guide

for Version 4.2

TimeWizard® 4.2 TimeWizard.*enterprise* User's Guide

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Contents

Introduction

Welcome to TimeWizard.*enterprise*. This introduction provides information on using this guide and on the basics and benefits of time accounting.

Understanding Time Accounting

In the day-to-day management of your company, department managers and project managers break down your company's projects into a number of activities, which are then assigned to employees (depending on their skills and areas of expertise). However, planning a project and assigning employees 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. TimeWizard is an invaluable tool in providing this information.

Using TimeWizard, employees see their assigned activities when they access their timesheets. These assignments can be retrieved directly from an external project management application or other system, eliminating the need for redundant data entry. Employees record the time they have spent working on the individual assignments—noting pay codes, cost codes and other detailed information when appropriate. This data can be transmitted to other corporate systems so that all appropriate managers and departments have full, accurate, and up-to-date information.

Using TimeWizard for project management

In addition to providing time accounting data to the Payroll and Human Resources departments, TimeWizard aids managers and employees in project management.

- Managers see the true current status of their departmental agendas and projects and can add additional resources, modify the schedule, or adjust project scope.

- Employees' timesheets can easily inform managers of revised estimates to complete assignments. No unpleasant surprises occur when the original completion date arrives.
- Over-commitment of an employee is reduced. Using the knowledge gathered by TimeWizard, managers can see the impact of new assignments on an employee and reassign the work to available employees or modify time frames.
- Managers can use the historical knowledge from TimeWizard, based on actual data from employees, to make more accurate future plans. Employees will not be scheduled to complete 60 hours of effort in 40 hours of time.
- Managers are armed with the data needed to justify any corrective actions to management levels above.

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

About this guide

The guide is divided into two main sections:

- Section One, "Using the TimeWizard.*enterprise* Timesheet," is for all timesheet users.
- Section Two, "Managing the TimeWizard.*enterprise* Timesheet," contains additional information for managers who review, edit, or approve employees' timesheet data.

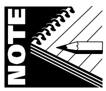
The chapters in each section are broken into objectives that explain in detail how to use each timesheet function.

Your TimeWizard experience may differ from this guide in two ways:

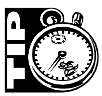
1. The guide's illustrations may show different settings and column headings than your timesheet. Because TimeWizard is designed to conform to your organization's terminology and rules, you should expect some differences in screen content once you begin to use the system.
2. Some timesheet functions described in the guide may not be available to you. What you are allowed to do within TimeWizard.*enterprise* depends on permissions set for you by your company's TimeWizard administrator.

For information on setting up TimeWizard and assigning permissions, see the *TimeWizard Administrator's Guide*. For information on setting up the many types of reports included with TimeWizard, consult the *TimeWizard Guide to Reports*.

Conventions used in this guide



Notes call attention to information that is especially important. Often, the instructions in the notes affect the functioning of TimeWizard.



Tips offer additional information such as suggestions or time-saving shortcuts.

Names of buttons and icons appear in bold type, for example: Click on **Apply**.

S E C T I O N   O N E

Using the TimeWizard.*enterprise* Timesheet

For each timesheet feature, this section gives you the feature's purpose, the rules that apply to it, and specific step-by-step directions.

Managers who can view or edit other employees' timesheets or approve timesheet data should also read Section Two, "Managing the TimeWizard.*enterprise* Timesheet."

CHAPTER 1

Understanding Timesheet Basics

This chapter explains how to log in to and exit from your TimeWizard.*enterprise* timesheet and change your password. It also shows you how to send email from your timesheet and use the online help.

NOTE

When you open a timesheet or perform any other action that loads or refreshes a Web page, always wait until the page has finished loading completely in the browser window before entering time, changing periods, or performing another function.

Objectives

1. Accessing TimeWizard.*enterprise*
2. Logging in to the application
3. Changing your password
4. Accessing the About window
5. Sending email from TimeWizard.*enterprise*
6. Using the online help
7. Exiting the timesheet

Objective 1: Accessing TimeWizard.enterprise

You view and work in the TimeWizard.*enterprise* timesheet by using a supported browser.

To access TimeWizard.*enterprise*:

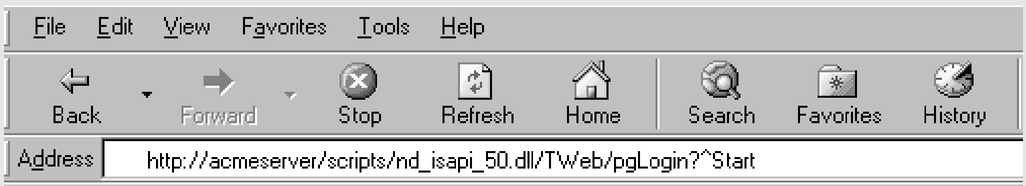


Figure 1.1

1. Open your browser and type the URL or address (supplied by your TimeWizard administrator) in the address box.
2. Press the Enter key or click on **Go** to access the TimeWizard Main Page (Figure 1.2a).

TIP

You or your network administrator can set up a shortcut icon on your desktop or a "Bookmark" or "Favorites" entry in your browser to link you to TimeWizard.*enterprise* without typing the URL.

Objective 2: Logging in to the application

Your login ID and initial password have been entered in the list of valid login IDs by your TimeWizard administrator. After you log in to the application, you will see your personalized Employee Home Page (Figure 1.2b). This page gives you access to your timesheet and, depending on your permissions, to other features of TimeWizard.*enterprise*.

NOTE

The login ID is case sensitive, and you must type the same combination of capital and lowercase letters that are given to you. The password is always lowercase. The login ID and password may include numbers. (See "Changing your password" on page 19 for other password rules.)

Your company may have set up TimeWizard.*enterprise* so that you do not need to log in to use your timesheet. In that case, your valid login to your computer operating system or corporate intranet allows you to bypass the TimeWizard Main Page (Figure 1.2a). Consult the *TimeWizard Implementation Guide* for the methods, system requirements, and settings to implement this procedure.

If your configuration of TimeWizard.*enterprise* requires you to log in, follow the steps on page 18.

TIP

Your Employee Home Page may display additional messages which your company can update as desired.

To log in to the timesheet:

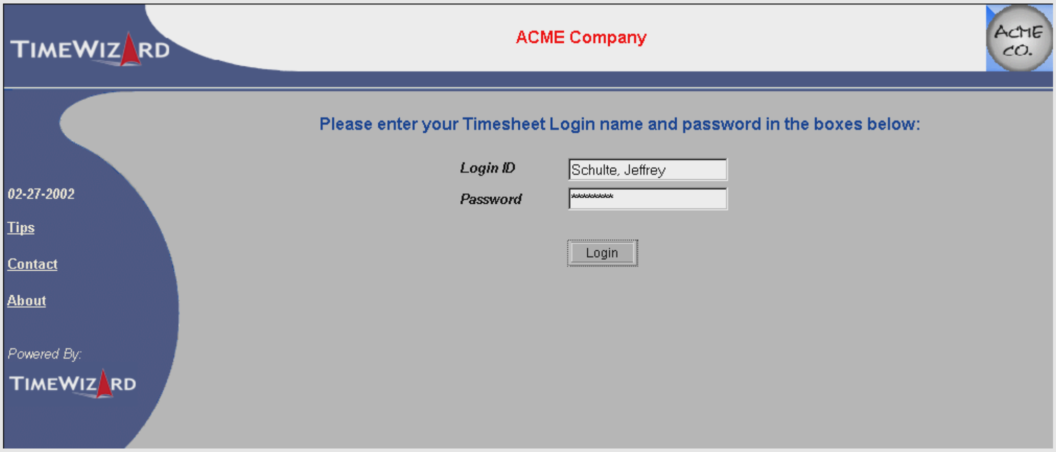


Figure 1.2a

Figure 1.2b

1. Click in the Login ID box on the Main Page (Figure 1.2a) and enter your login ID.
2. Click in or tab to the Password box and enter your password.
3. Do one of the following to open your Employee Home Page:
   - Press the Enter key, or
   - Click on the **Login** button
4. In your Employee Home Page (Figure 1.2b), click on the **Timesheet** button, located in the main navigation frame at the top of the page, to open your timesheet.

Objective 3: Changing your password

You can access the change password function from your Employee Home Page (Figure 1.2b). If your password has expired, the Change Password dialog box will also open when you attempt to log in.

NOTE

Because of encryption limitations, do not begin or end your password with the letter "a," do not begin your password with a number, and do not use uppercase letters in your password. Your password must be at least four characters, but no more than twenty characters.

Except for these restrictions, you can use any combination of lowercase letters or numbers for your password.

To change your password:

1. On the Employee Home Page, click on the **Change Password** link on the left to open the Change Password window (Figure 1.3).
2. Enter your current password in the Password box.
3. Enter a new password in the New Password box. The password must conform to the restrictions in the above note.
4. Enter the new password in the Confirm New Password box.
5. Click on **OK** to return to the Employee Home Page.

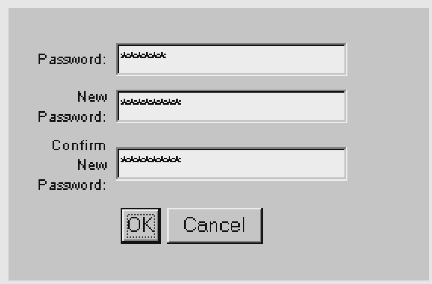


Figure 1.3

Objective 4: Accessing the About window

The About TimeWizard window (Figure 1.4) displays information about your TimeWizard.*enterprise* version and license. Use it to view the following data:

- Version number
- Name of license owner
- Product serial number
- Project management application you may use with TimeWizard
- Number of licenses assigned to license owner.

To access the About window:

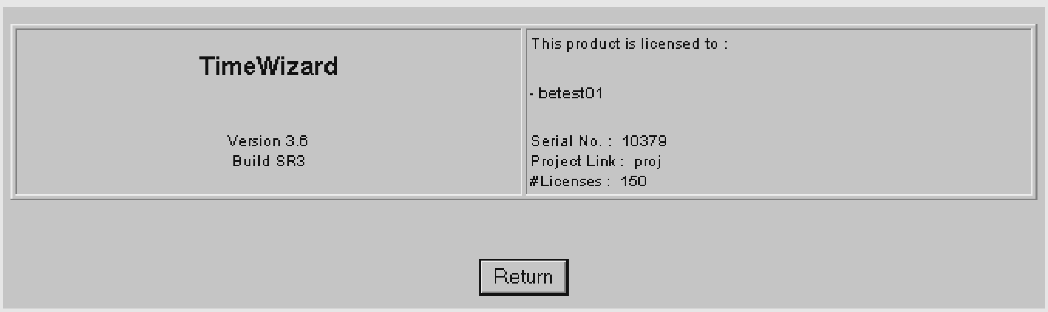


Figure 1.4

1. Click on the **About** icon  on the toolbar to open the About TimeWizard window.

2. Review the information, and click on **Return** to close the window.

Objective 5: Sending email from TimeWizard.enterprise

If you have an SMTP mail server, and the necessary data has been entered in the TimeWizard Administrator application, you can send email messages directly from TimeWizard.*enterprise*.

To send email:

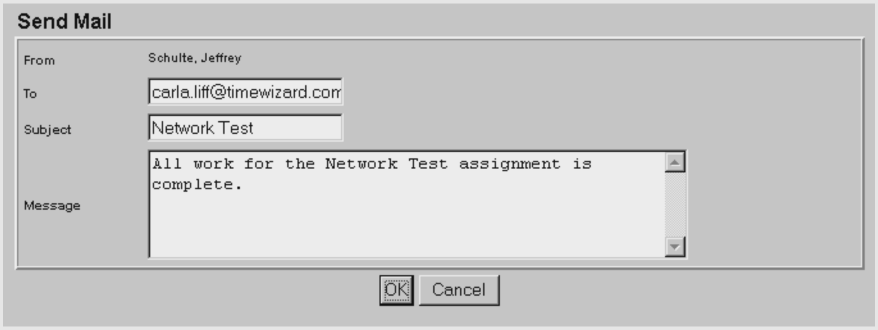


Figure 1.5

1. Click on the **Email** icon  on the toolbar to open the Send Mail window.
2. Click in the "To" text box, and enter the intended receiver's fully qualified Internet email address, e.g., carla.liff@timewizard.com.
3. Tab to or click in the "Subject" text box, and enter the subject of the message.
4. Tab to or click in the bottom text box, and enter your message text.
5. Tab to the **OK** button and press the Enter key, or click on **OK** to send your message. Click on **Cancel** instead of **OK** if you do not want to send the message.

Objective 6: Using the online help

TimeWizard.*enterprise* is equipped with extensive online help files.

You can approach the online help files in either of two ways:

- To work your way through the topics in a forward progression, use the Contents list. When you open the Help window, the Contents list displays in the left frame by default (Figure 1.6).
- To search for specific information from an alphabetical list, use the Index list. The Index list will display in the left frame instead of the Contents.

The help topic pages may contain more information than fits in the right frame of the Help window. You can scroll a topic page by using the scroll bar and scroll arrows, or you can click in the right frame and then use your keyboard in the following manner:

- To scroll down, use the Down Arrow key.
- To scroll up, use the Up Arrow key.
- To scroll to the end of the topic, press the End key.
- To scroll to the beginning of the topic, press the Home key.

To use these keystrokes in the Contents or Index list, first click in the left frame.

Clicking on the blue text in the right frame opens a related topic page. Depending on the browser you use, the blue text may be underlined.

You can open the Help window from either your Employee Home Page or your timesheet. When you close the Help window, TimeWizard returns you to your previous location.

To use the online help:

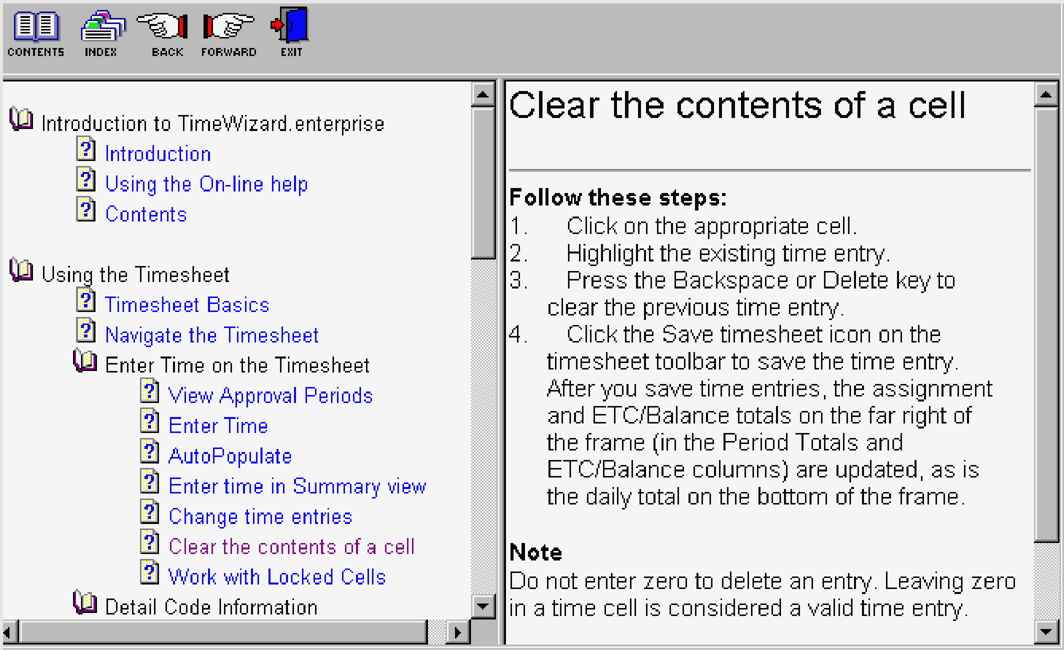


Figure 1.6

1. To open the Help window, click on the **Help** icon on the toolbar or click on the "***i***" (information) button in the main navigation frame of the Employee Home Page. Resize the window as desired.
2. To use the Contents list in the left frame, click on a topic name next to a **Topic** icon .
3. To use the Index list, click on the **Index** icon in the top frame. Scroll through the list in the left frame and click on a topic name.

   To return to the Contents list, click on the **Contents** icon in the top frame.
4. In the right frame, scroll down as needed to read your selected topic page. Click on blue or underlined text to display a related topic page.
5. To reopen the previous page you viewed, click on the **Back** icon in the top frame. Additional clicks on the icon will retrace your path of pages backward
6. To retrace your path of pages forward, click on the **Forward** icon in the top frame.
7. To close the Help window, click on the **Exit** icon in the top frame or click on the "**X**" in the upper right corner of the browser. Closing the Help window returns you to your previous location.

Objective 7: Exiting the timesheet

NOTE

Your timesheet transactions are not automatically saved when you exit the TimeWizard.*enterprise* timesheet. Ensure that you save all timesheet transactions by clicking on the **Save Timesheet** icon on the toolbar before exiting. You must also save your transactions before selecting another period, department, employee, timesheet view, or assignment row view, and before clicking on any icon other than **Save Timesheet**.

Clicking on the **Exit** icon will close your timesheet session and take you back to your Employee Home Page.

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

To exit the TimeWizard.*enterprise* timesheet:

1. Click on the **Save Timesheet** icon to retain any unsaved transactions.
2. Click on the **Exit** icon (Figure 1.7) to close your timesheet and return to your Employee Home Page.
3. To return to the TimeWizard Main Page and login window, click on one of the following:
   - The **Home** link on the left side of the Employee Home Page
   - The TimeWizard graphic in the upper left corner of the main navigation frame

Figure 1.7

CHAPTER 2

Navigating the Timesheet

The TimeWizard.*enterprise* timesheet helps you to monitor and manage time for all your assignments. In this chapter, you tour the areas of the timesheet: the toolbar, the Timesheet Status frame, and the Time Reporting frame. You also learn how to choose between two views of the Time Reporting frame and how to access project management (PM) data about your assignments.

This chapter introduces you to many timesheet features but is not intended to supply complete information about them. The remaining chapters provide you with detailed information on how to use the features.

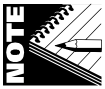
A few items that are not described in this chapter only display on the timesheet when you use particular features and are described elsewhere in this guide.

Objectives

1. Navigating the timesheet toolbar
2. Navigating the Timesheet Status frame
3. Navigating the Time Reporting frame
4. Selecting the summary view or the detail view
5. Viewing project management information

Objective 1: Navigating the timesheet toolbar

The timesheet toolbar (Figure 2.1), located in the upper left of your timesheet, enables you to perform almost all TimeWizard.*enterprise* functions directly through your timesheet. Table 2.1 briefly describes the function of each toolbar icon.



Depending on the permissions granted to you by your TimeWizard administrator, some functions may be disabled on your timesheet.

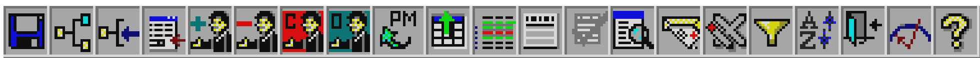


Figure 2.1

Table 2.1: Timesheet Toolbar Icons

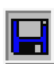
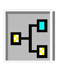
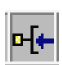
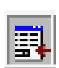
Toolbar Icon	Function
	The Save Timesheet icon saves all transactions on the timesheet for the selected period. Transactions include time entries and the application of detail codes to the time entries.
	The Detail View icon expands the timesheet to display one or more detail code rows under each assignment row.
	The Summary View icon collapses the detail view of the timesheet to display the assignment rows without detail code rows.
	The Insert Detail icon adds an additional detail code row for a selected assignment.
	The Add Assignment icon opens the Add Assignment dialog box and enables you to add one or more assignments to the timesheet.
	The Delete Assignment icon deletes a selected assignment from the timesheet, if no time is entered for the assignment in any period.

Table 2.1: Timesheet Toolbar Icons

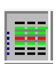
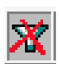
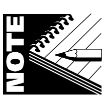
Toolbar Icon	Function
	The Close Assignment icon closes a selected assignment, preventing additions or changes to the assignment in any period.
	The Open Assignment icon reopens a selected closed assignment for the addition or editing of transactions.
	The View PM icon opens the PM Information window, which displays project management data for a selected assignment.
	The Submit Timesheet icon opens the Submit Timesheet dialog box and enables you to submit your timesheet for approval. If you are not authorized to submit your timesheet, a TimeWizard department owner will submit it for you.
	The Approval History icon opens the Approval History window, which displays approvals and rejections of the timesheet data for the selected period.
	The Summary icon opens the Timesheet Summary dialog box and enables you to leave a timesheet summary note for the selected period.
	The Historical Corrections icon opens the Historical Corrections dialog box and enables you to make changes to a timesheet for a period that has been closed. The TimeWizard database keeps records of the old data and the changes.
	The View Timesheet icon opens a print preview window and enables you to print data for the selected period. Assignments without time entered for the period do not display.
	The Send Mail icon enables you to send Internet email messages directly from TimeWizard.

Table 2.1: Timesheet Toolbar Icons

Toolbar Icon	Function
	The Timesheet Template icon enables you to specify time to be entered automatically on your timesheet using the AutoPopulate feature.
	The Apply Filter icon temporarily "hides" or "filters out" selected assignments on your timesheet. The icon only appears on the toolbar when no filter is applied to the timesheet.
	The Remove Filter icon restores hidden assignments to your timesheet display. The icon only appears on the toolbar when a filter is applied to the timesheet.
	The Timesheet Sort icon opens the Timesheet Sort dialog box and enables you to set the sorting priorities and sort order for timesheet assignments.
	The Exit icon ends your timesheet session and returns you to your Employee Home Page.
	The About icon opens the About TimeWizard window, which displays information about your TimeWizard version and license.
	The Help icon opens the TimeWizard.*enterprise* online help files.



The Apple Macintosh operating system does not support the display of screen tips, the captions that appear when you place the cursor over a TimeWizard icon.

Objective 2: Navigating the Timesheet Status frame

The Timesheet Status frame (Figure 2.2) is located below the timesheet toolbar and contains information about the timesheet being viewed. The information includes mode (i.e., "Edit" or "Read Only"), period specifications, and timesheet approval status. Depending on your permissions, you can use the Status frame to navigate to a timesheet for another period or another employee.

Table 2.2 explains the items within the Status frame in detail.

Figure 2.2

Table 2.2: Timesheet Status Frame

Status Frame Item	Explanation
Timesheet drop-down box	The left side of the Status frame contains the name of the employee whose timesheet is displayed. If the user has permission to view other employees' timesheets, this box can display a different name than the user who is logged in to the application.
View drop-down box	The middle of the Status frame displays "SELF" when the timesheet belongs to the user who is logged in. If the user has the appropriate permission, this box also contains a list of departments the user can select to view timesheets of other employees.
"Edit" or "Read Only" designation	Above the View box is the mode designation, which displays "Edit" when the timesheet can be edited and "Read Only" when the timesheet can be viewed but not edited.
Cell Data check box	The middle of the Status frame contains the Cell Data box, which enables the user to view data from one part of the timesheet while working in another part.
Edit Timesheet icon	To the right of the Cell Data box, a pencil-shaped icon enables authorized users to change the mode from "Read Only" to "Edit."

Table 2.2: Timesheet Status Frame

Status Frame Item	Explanation
Period Begin date label and Period End date drop-down box	The right side of the Status frame contains the beginning date and end date of the displayed timesheet. Depending on permissions, the Period End drop-down box can be used to display previous or future timesheets.
Period Status	Period Status, below “Period Begin,” displays “Open” when the timesheet being viewed can accept additions and changes and “Closed” when the timesheet being viewed is locked. Changes can be made for closed periods only by users with the Historical Corrections permission.
Approval Status	Approval Status, below “Period End,” displays the approval status (“Unapproved,” “Approved,” or “Rejected”) of the entire timesheet for the period. (Optional activity approvals of individual assignments are displayed in the Time Reporting frame.)

NOTE Before changing the selection in the Timesheet, View, or Period End drop-down boxes, save any timesheet changes you want to retain.

Objective 3: Navigating the Time Reporting frame

The Time Reporting frame (Figure 2.3) is located below the Timesheet Status frame and includes assignment rows, a grid of daily time cells, and time totals by day, assignment, and period.

In addition to recording the time you worked, you may be able to adjust the estimate to complete (ETC) for each assignment if you have the appropriate permission. Editing the ETC enables you to communicate more about the status of the work to a manager through your timesheet. If you cannot edit the ETC, you can easily see the amount of time in which management expects you to finish the work. The column that displays the ETC can display your remaining balance (Bal) for non-project assignments such as vacation and sick leave. If TimeWizard is set up for accruals, the amount of hours that you accrue each period for specific leave assignments is regularly added to their balances.

Table 2.3 explains the items within the Time Reporting frame.

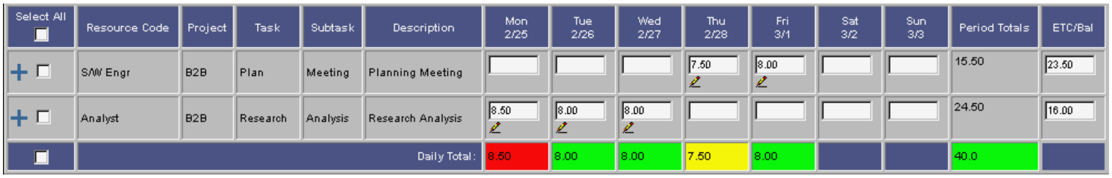


Figure 2.3

Table 2.3: Time Reporting Frame

Time Reporting Frame Item	Explanation
Select All check boxes	Clicking in the Select All check box at the top of the column of check boxes selects all displayed assignments. For your convenience, a second Select All check box (without a label) is located at the bottom of the column.
Select column	Clicking in a check box in the Select column selects the adjacent assignment row. You select a row before deleting, closing, opening or filtering out an assignment, inserting a detail code row, or accessing assignment-specific project management data. Clicking on the "+" icon expands the assignment row to the detail view. Clicking on the "-" icon collapses the assignment back to the summary view. (You do not need to check the row's box before expanding or collapsing an assignment.) **Note:** Save any timesheet changes before expanding or collapsing a row. For organizations using activity-oriented approvals, a graphic of a hand displays the assignment's approval status after the timesheet has been submitted for approval.
Resource Code column	This column displays the resource code associated with each assignment row, including the <unclassified> code.

Table 2.3: Time Reporting Frame

Time Reporting Frame Item	Explanation
Activity Field columns	These user-defined columns display the activity names, such as project and task names, that comprise each assignment on the timesheet. The last activity column on the right can display the activity description or be blank.
Daily columns	These columns contain time cells for all the days in the displayed period. A cell at the intersection of an assignment row and day column shows time worked for the specific assignment on the specific day. If your company uses long periods, scroll to the right to see the columns at the end of the period. **Note:** You must click on the **Save Timesheet** icon to save time entered.
Daily Total row	This row, at the bottom of the daily columns, displays the total time entered for each day in the period.
Period Totals column	This column, to the right of the daily columns, displays the total time entered for each assignment row for the period. The period total for all assignments combined is displayed at the bottom of the Period Totals column.
ETC/Bal column	The last column on the right displays the current estimate to complete (ETC) for project-related assignments and the remaining balance (Bal) for assignments such as sick leave and vacation. The ETC and balance are expressed in hours. With the appropriate permission, the user may adjust the ETC for an assignment.

Objective 4: Selecting the summary view or the detail view

TimeWizard.*enterprise* offers two timesheet view options: the summary view and the detail view. Your access to the summary view or detail view may be predetermined or restricted by your company's TimeWizard administrator.

Summary View

The summary view of the Time Reporting frame enables you to enter hours directly in the time grid cells shown in Objective 3 (Figure 2.3). By default, when you first log in to your timesheet, the summary view displays.

Detail View

The detail view of the Time Reporting frame (Figure 2.4) displays the same items as the summary view with the addition of detail code rows. The detail rows allow you to associate customized detail codes with a particular entry of time. This detailed data can be shared with other departments, such as Payroll, Accounting, and Human Resources

When you enter time in the summary view, default detail codes chosen by your company may be applied to the time entries automatically.

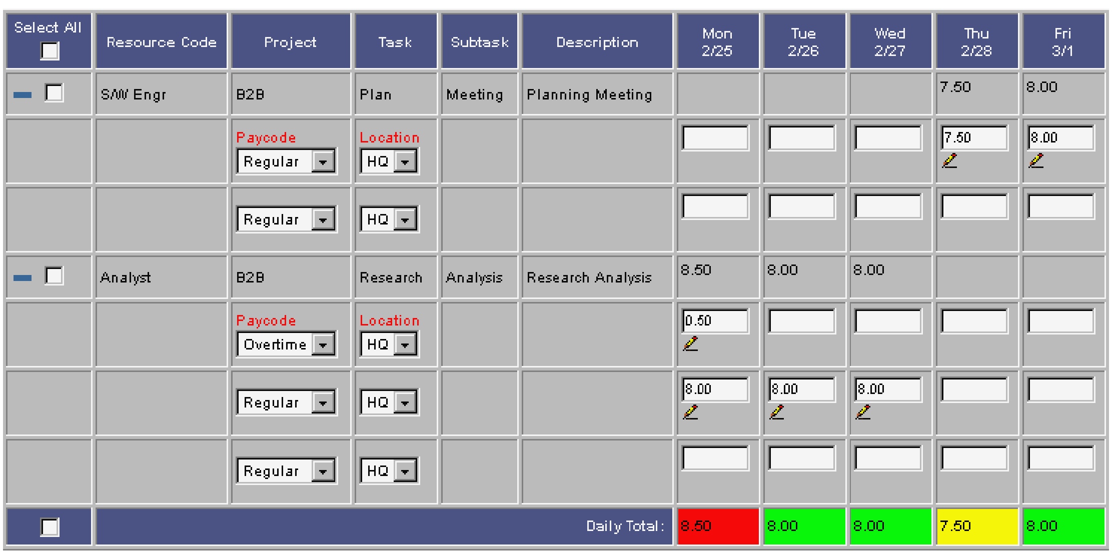


Figure 2.4

When the timesheet summary view is displayed, you can expand selected assignment rows to the detail view, while other rows remain in the summary view.

To change the timesheet view:

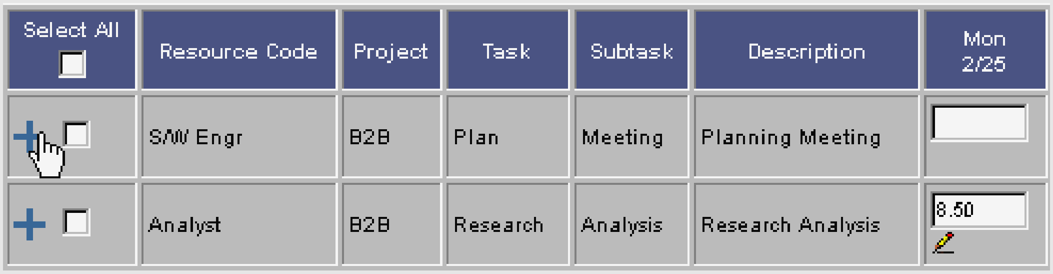
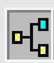
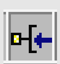


Figure 2.5

NOTE: Click on the **Save Timesheet** icon before changing the timesheet view or row view to retain any changes.

1. To change to the detail view of the timesheet, click on the **Detail View** icon  on the toolbar.
2. To change to the summary view of the timesheet, click on the **Summary View** icon  on the toolbar.
3. To expand to the detail view of one assignment row, click on the "**+**" in the Select column on the left of the assignment row (Figure 2.5).
4. To collapse one expanded assignment row to the summary view, click on the "**-**" in the Select column on the left of the assignment row.

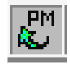
Objective 5: Viewing project management information

You can view detailed project management (PM) information for any of your project-related assignments. The PM Information window (Figure 2.6) displays total planned hours and total actual hours recorded for a selected assignment. The window also displays the assignment's planned start and finish dates, earliest possible start and finish dates, earliest actual date for which time was recorded and, if the assignment is closed, the latest actual date for which time was recorded. Table 2.4 defines each acronym in the PM Information window.

Figure 2.6

Table 2.4: PM Information window

PM Window Term	Explanation
PS/PF	Planned Start/Planned Finish: The original planned dates for the assignment start and finish
ES/EF	Early Start/Early Finish: The earliest dates that an assignment can start and finish, based on its planned duration and dependency on other conditions, including completion of other assignments
RAS/RAF	Resource Actual Start/Resource Actual Finish: The date for which an employee first entered time for an assignment and the last date for which the employee entered time before an assignment was closed
Plan	The total hours originally planned for the assignment
Cum	The cumulative hours entered for an assignment to date, including any initial actual hours retrieved from an external system
Priority	The priority rating of the assignment, for example, “Priority: 1” Unless your company uses Microsoft Project with TimeWizard, the lowest numbers represent the highest priorities. With Microsoft Project, the highest numbers represent the highest priorities.

The PM Information window can be accessed by selecting an assignment and clicking on the View PM icon  on the toolbar. To close the window and return to the timesheet, click on the **Return** button.

Additional project management data is provided by the estimate to complete (ETC) in the Time Reporting frame (Figure 2.3).

CHAPTER 3

Entering Time on Your Timesheet

The TimeWizard.*enterprise* timesheet makes recording your work time quick and easy. In this chapter, you learn how to view your timesheet in different approval periods, enter and edit time on your timesheet, and print data from your timesheet. You also learn how to work with locked timesheet cells.

This chapter also explains the Filter and AutoPopulate features. AutoPopulate enables you to have time entered automatically on your timesheet when your assignments and schedule are standard.

A filter on your timesheet allows you to determine which of your assignments are currently displayed. If you have a large number of assignments on your timesheet, the filter enables you to "hide" the assignments you are not currently using. Hidden assignments are not deleted from TimeWizard and can be easily restored to your timesheet.

Differences between working with expanded rows and collapsed rows

In Chapter 2, we introduced you to the summary and detail views of the timesheet and to expanded and collapsed assignment rows. While basic time entry instructions are the same for expanded and collapsed rows, the following differences distinguish the two:

- In an expanded assignment row, you can only enter or edit time in a detail code row. You cannot enter or edit time in the summary portion of that assignment row. (A cell's total time displays in the summary portion whether the row is expanded or collapsed.)
- If an assignment has multiple detail code rows that you want to retain, you should edit time for the assignment only in an expanded row. If you edit time in

a collapsed row, the default detail codes are applied to the time, and all other detail code rows for the assignment are **deleted**.

Chapter 4, “Working with Detail Code Information,” provides more information on entering and editing time in detail code rows and on other aspects of detail codes.

NOTE

The ability to select the detail or summary view may be restricted by your company's TimeWizard administrator.

Objectives

1. Viewing previous or future approval periods
2. Entering time on your timesheet in summary view
3. Viewing time cell data on a large timesheet
4. Editing time entries
5. Clearing the contents of a cell
6. Printing timesheet data
7. Filtering assignments on your timesheet
8. Removing a filter from your timesheet
9. Working with locked cells
10. Working with AutoPopulate

Objective 1: Viewing previous or future approval periods

When you open your timesheet, the timesheet for the current period is displayed. Your preference settings in the TimeWizard Administrator application determine how many past or future periods you can view. If you access a past or future timesheet with the period status "Open" and the approval status "Unapproved," you can add or edit time for that period.

NOTE: Timesheets for the periods you can view are identified by the end date of the period.

To view previous or future approval periods:

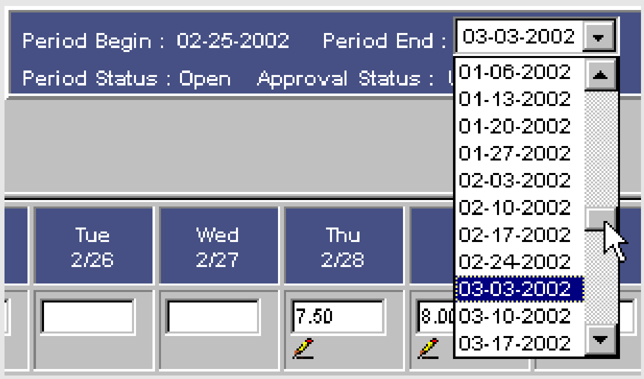


Figure 3.1

NOTE: Click on the **Save Timesheet** icon to retain unsaved changes to the displayed timesheet before changing the period.

1. Click on the Period End drop-down box or arrow in the Timesheet Status frame to display the periods you can view.
2. Scroll up or down to locate the end date of the period you want to access.
3. Click on the selected period end date to open the desired timesheet. The previously displayed timesheet closes, and your selected timesheet displays in the timesheet window.

Objective 2: Entering time on your timesheet in summary view

TimeWizard records whole and partial hours. You can enter partial hours in tenths and hundreths of an hour. Table 3.1 shows examples of valid time entries.

Table 3.1: Time Entry Examples

To enter:	You type:
Four hours	4
A quarter of an hour (15 minutes)	.25
An hour and a half (90 minutes)	1.5
Three-quarters of an hour (45 minutes)	.75
One-tenth of an hour (6 minutes)	.1
Two hours and two-tenths of an hour (2 hours, 12 minutes)	2.2

When you save your timesheet transactions, TimeWizard formats most entries to display two digits to the right of the decimal point and at least one digit to the left of the decimal point. For example, your entry of “4” will display as “4.00,” and your entry of “.25” will display as “0.25” after you save the timesheet.

The exception to the time formatting is that entries of zero hours will display as “0” without a decimal point or other digits. You can enter zero hours in a time cell to associate a special amount or detail code with the cell when you don’t want to enter work time. For example, you can record your Sunday travel expenses without entering work time for Sunday.

An entry in a time cell can be as much as 24 hours. Neither a time cell or a daily total box will allow more than 24 hours to be saved. If your company has set TimeWizard to allow entry of negative hours, type a hyphen immediately before a negative hour entry.

After you enter and save time entries, the Period Totals and ETC/Bal columns at the right of the frame are updated, as is the Daily Total row at the bottom of the frame. Table 3.2 explains the color coding of the daily and period total boxes.

Table 3.2: Color Coding of Totals

Color Code	Explanation
Green	The number of hours is the exact amount defined as your standard work day or standard work week.
Yellow	The number of hours is less than the amount defined as your standard work day or standard work week.
Red	The number of hours exceeds the amount defined as your standard work day or standard work week.

NOTE

You can enter time in any time cell with a white background. Time cells with a gray background are "locked" or in Read Only mode and will not allow a new entry. To learn ways of unlocking a cell, see Objective 9: "Working with locked cells."

To enter time on your timesheet:

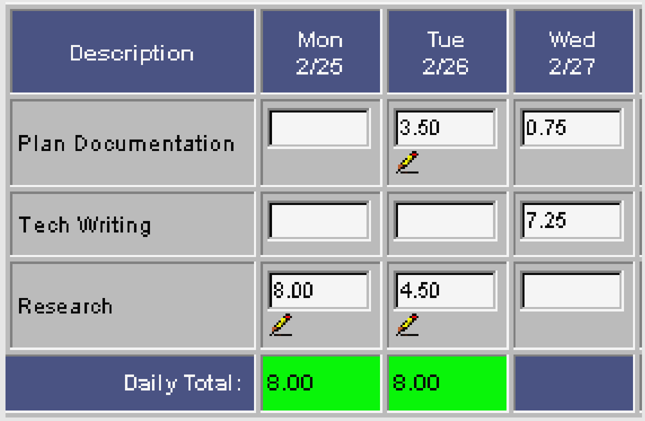


Figure 3.2

1. Click in the time cell of the assignment and day for which you want to enter time.
2. Enter the number of hours you worked on that assignment on that day.
3. Click in or tab to another time cell where you want to enter time. Repeat steps 2 and 3 as needed.
4. After making your entries, click on the **Save Timesheet** icon on the toolbar to save your entries.

NOTE

You must save your transactions before performing any of the following actions:

- Expanding or collapsing any assignment row
- Changing the timesheet view
- Clicking on any toolbar icon other than **Save Timesheet**
- Changing the period
- Selecting a department in the View drop-down box
- Selecting an employee in the Timesheet drop-down box
- Exiting the timesheet

Objective 3: Viewing time cell data on a large timesheet

The cell data feature on your timesheet (Figure 3.3) allows you to see data that would usually be out of view on a large timesheet. If your timesheet displays a lengthy period, you can view the assignment name and description located on the left side of the timesheet when you scroll to the dates on the right side. If your timesheet displays many assignment rows, you can view the date located at the top of a column when you scroll to the bottom assignment rows. Similarly, you can view the daily total located at the bottom of a column when the upper assignment rows show on your screen.

A property setting determines whether the cell data feature is on when you open your timesheet. You can turn the feature on or off from your timesheet at any time. When the feature is on and you click in a time cell, a pop-up window opens near the bottom of the screen to display data associated with the selected cell. When the feature is off, the pop-up window does not display.

When the feature is on and you click in various cells, the pop-up window displays only the data associated with the newly-selected cell. When you click away from the time cells, the pop-up window closes temporarily.

The cell data feature displays the following data for a time cell:

- Assignment name, including resource code
- Assignment description
- Timesheet column date
- Daily total

NOTE

If the cursor is in a time cell when the cell data feature is off, and you then turn the feature on, you must click in the time cell again to open the pop-up window.

To view time cell data:

Figure 3.3

1. To turn on the cell data feature, click in the Cell Data check box in the Timesheet Status frame to display a check mark.
2. Click in the desired time cell to display associated data in a pop-up window.
3. To view data associated with another cell, click in that cell.
4. To temporarily close the data pop-up window, click on the timesheet outside of the time cells.
5. To turn off the cell data feature, click in the Cell Data check box to remove the check mark.

Objective 4: Editing time entries

As long as the timesheet approval status is “Unapproved” or “Rejected,” and the period status is “Open,” you can edit existing entries on your timesheet. The specific assignment you want to edit must also be open. Depending on your permissions, you may be able to open a closed assignment or edit time in a closed period by performing additional steps.

NOTE

If you edit time in the summary view and the row is collapsed, all detail code rows other than the default row are deleted. To retain the detail code rows, expand the row before editing.

To remove a time entry and leave the cell blank, see Objective 5: “Clearing the contents of a cell.” For information on opening a closed assignment, see Chapter 6, Objective 7: “Opening an assignment on your timesheet.” For information on editing time in closed periods, see Chapter 9, “Making Historical Corrections.” To learn more about entering and editing detail code rows, see Chapter 4, “Working with Detail Code Information.”

To edit time entries:

1. In the cell with the time entry you want to edit, do one of the following:
   - Click-and-drag to highlight the entry (or part of the entry). Type the new time to overwrite the old entry.
   - Click to the right of the numbers you want to edit and use the Backspace key to delete. Type the new numbers.
2. Click the **Save Timesheet** icon to save your edit.

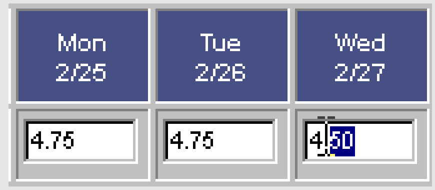


Figure 3.4

After you edit and save time entries, the Period Totals and ETC/Bal columns at the right of the frame are updated, as is the Daily Total row at the bottom of the frame.

Objective 5: Clearing the contents of a cell

If a time cell is not "locked," you can remove a time entry from a cell, or "clear the cell," and leave the cell blank. Clearing the cell removes any transaction notes and detail codes that were associated with the time entry. Depending on a global preference setting, a record of the entry may remain in the TimeWizard database, though the entry does not display on the timesheet and is not included in any totals.

NOTE

Do not enter zero to clear the contents of a cell. "0" in a time cell causes the assignment to be treated as if time were entered. For example, "0" causes the assignment to be included in various TimeWizard reports and prevents the assignment from being deleted from the timesheet.

As with the edit of a time entry, when you clear a cell and save the timesheet, the Daily Total row and the Period Totals and ETC/Bal columns are updated.

To clear the contents of a cell:

1. Click on the time cell you want to clear.
2. Highlight the existing time entry (Figure 3.5.)
3. Press the Backspace or Delete key to clear the selected time entry and any associated notes or detail code data.
4. Click the **Save Timesheet** icon to save the changes.

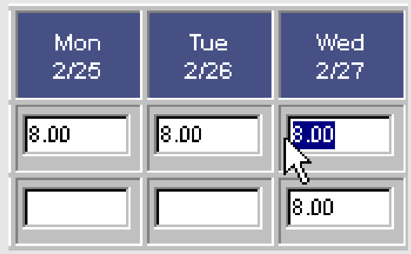


Figure 3.5

Objective 6: Printing timesheet data

While working in your timesheet, you can print a hard copy of the timesheet data. The printout includes the time entries, detail code data, and approval status for a selected approval period, as well as your identification data. Only assignments for which time has been entered for the selected period are included.

To print timesheet data:

Period Ending: March 31, 2002

Printed On: April 16, 2002 4:10:38 PM

Timesheet For: Johnson, Eddie **Department :** Web Development **Approval Status :** Pending

Employee ID 014 **Employee Code** EC02

						Mon 3/25	Tue 3/26	Wed 3/27	Thu 3/28	Fri 3/29	Sat 3/30	Sun 3/31	Total	ETC/ BAL
Resource=S/W Engr, Project=MxModule, Task=Design, Subtask=DataModel, Description=DataModel														46.50
Overtime	HQ	BC03					1.50						1.50	
Regular	HQ	BC02				8.00	8.00						16.00	
Resource=<unclassified>, Project=B2B, Task=Plan, Subtask=Meeting, Description=Planning Meeting														0.00
Regular	HQ	BC01						8.00	8.00	8.00			24.00	
Total Hours						8.00	9.50	8.00	8.00	8.00	0.00	0.00	41.50	

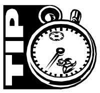
Figure 3.6

1. Open the timesheet and select the desired period.
2. Click on the **View Timesheet** icon  on the toolbar to view what you can print. An additional browser window opens to display the preview.
3. Resize the temporary browser window or use the scroll bars as needed to view all the data.
4. To print the data, select Print from the File menu of the temporary browser window.
5. To exit the temporary window, select Close from the browser's File menu or click on the **X** in the upper right corner of the window.

Objective 7: Filtering assignments on your timesheet

To display only some of your assignments, you apply a filter to your timesheet. If you have a large number of assignments on your timesheet, the filter can "hide" the assignments you are not currently using. Assignments that are displayed after filtering occupy the upper assignment rows. Hidden assignments are not deleted, and you can easily restore them to your timesheet.

When you apply a filter to a timesheet, a second daily total row, Displayed Assignments Total, appears between the time cells and the Daily Total row. The Daily Total row displays the total hours for both visible and hidden assignments. The Displayed Assignments Total row displays the total hours for visible assignments only.



To see the daily and period totals for a specific group of assignments, you can temporarily filter out the other assignments. TimeWizard will calculate the totals and display them in the Displayed Assignments Total row.

You use check boxes on the left of the assignment rows to select assignments. When you apply a filter, assignments that are checked are filtered out or hidden, and assignments that are unchecked remain visible.

You can select all of the displayed assignments by selecting a Select All check box, found at the top and bottom of the column of check boxes.

If you want to hide most of your assignments, you can use the Select All feature and then deselect the assignments you want to display.

When a filter is applied to a timesheet, TimeWizard automatically saves the filter. No matter how many times you exit and open the timesheet, the filter remains until you remove it.

The filter is automatically applied to all open periods, including past and future periods. When an assignment is closed, it does not display in future periods after the last period with time entered for the assignment.

You cannot apply a filter to a timesheet that already has a filter. To change which assignments display, remove the current filter and create a new one. For information on removing a filter, see Objective 8: "Removing a filter from your timesheet."

To filter assignments on your timesheet:

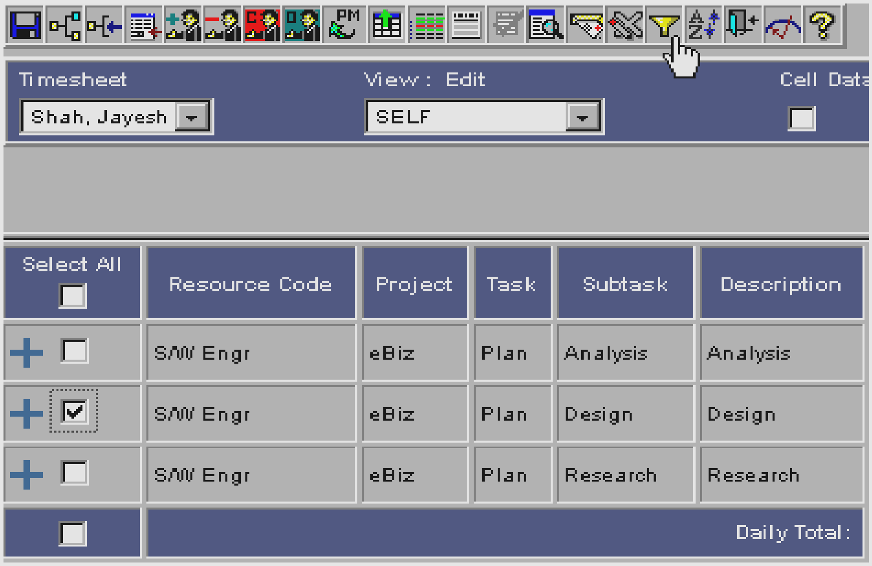


Figure 3.7

1. Select each assignment you wish to hide by clicking on its check box to display a check mark. (You can select all assignments by clicking on the Select All box at the top or bottom of the check boxes.)
2. Deselect each assignment you wish to display by clicking on its check box to remove the check mark.
3. Click on the **Apply Filter** icon  on the toolbar to refresh the timesheet and filter out or hide the checked assignments.
4. "Filter Applied" displays in the upper right corner of the timesheet.

Objective 8: Removing a filter from your timesheet

When a filter is applied, the **Apply Filter** toolbar icon changes to a **Remove Filter** icon (see Figure 3.7).

NOTE

When you remove a filter, you remove it from all periods.

To remove a filter from your timesheet:

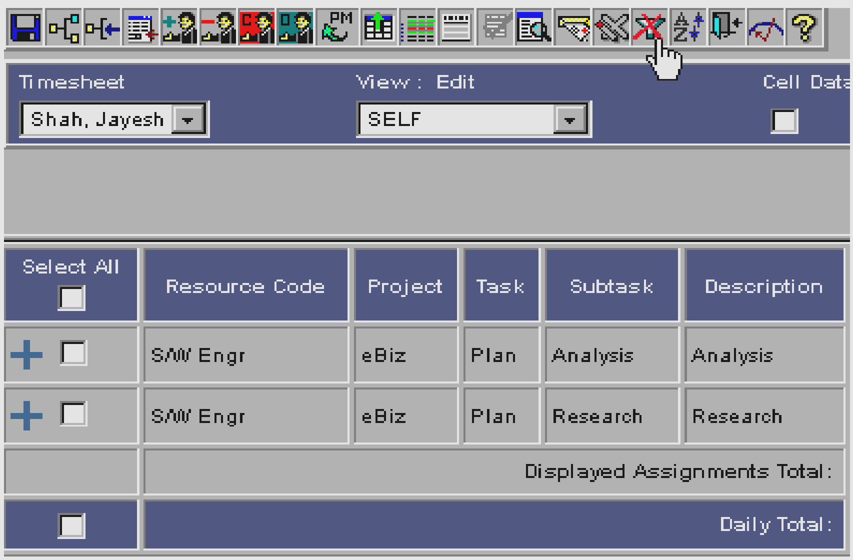


Figure 3.8

1. Open the timesheet to any open period.
2. Click on the **Remove Filter** icon on the toolbar.
3. The timesheet refreshes and displays all of your assignments. "Filter Applied" disappears from the upper right corner of the timesheet.

Objective 9: Working with locked cells

Under certain conditions, you cannot enter time or make changes to an entry on your timesheet. because the cell is “locked.” For example, when a timesheet is submitted for approval, its approval status changes to “Pending” and its mode changes to “Read Only.” Then you may view—but not edit—the data.

Table 3.3 explains the reasons a cell may be locked and the actions required to unlock it. Your permissions determine whether you can perform these actions. If you do not have the necessary permission, contact your department manager or TimeWizard administrator for assistance.

Table 3.3: Working with Locked Cells

Cause of Locked Cell	Solution	Reference
The assignment is closed.	Open the assignment to unlock the cells.	See Chapter 6, Objective 7: “Opening an assignment on your timesheet.”
The period is closed.	Use the Historical Correction feature to temporarily unlock the cells.	See Chapter 9, “Making Historical Corrections.”
Your timesheet approval status is “Pending” or “Approved.”	Clear (i.e., delete) the timesheet approvals or reject the timesheet to unlock the cells. Clearing approvals resets the status to “Unapproved.” Rejecting the timesheet changes the status to “Rejected.”	See Chapter 14, “Approving and Rejecting Timesheets for Departments.”
The timesheet belongs to another employee.	Leave an Employee Edit note to temporarily unlock the cells.	See Chapter 12, “Working in Your Employees' Timesheets.”

Objective 10: Working with AutoPopulate

TimeWizard AutoPopulate enables you to have time entered automatically on your timesheet. If you usually work the same amount of time on standard assignments each week, you may be designated as an AutoPopulate user. Once AutoPopulate is applied, you would only enter time manually on your timesheet when an exception occurs in your routine.

For example, if you work eight hours a day, Mondays through Thursdays, on the assignment "Accounts Payable" and eight hours a day on Fridays on the assignment "Payroll," AutoPopulate can "populate" your timesheet with this data automatically. If you use sick leave one day, you can manually remove that date's entry and enter the time in the row used for sick leave.

The AutoPopulate process uses a timesheet template. You, or your manager, can create the template for your timesheet. A timesheet template is a model of the time and employee assignments for one employee, in one period, which TimeWizard can use to automatically populate your timesheet in other periods.

Once you are designated as an AutoPopulate user in the TimeWizard Administrator application, you can make a template of your timesheet for use in the AutoPopulate process. Your company's TimeWizard administrator sets up and executes the AutoPopulate process in the TimeWizard Interface Controller.

Choosing a timesheet for a template

To determine which timesheet to choose for a template, apply the following rules:

1. An employee may have only one timesheet template at a time.
2. The timesheet has all of the time entries for all of the assignments you want to include in the template.
3. The timesheet does not have any time entries you do not want in the template. (The period may include assignments without time transactions.)
4. All of the assignments with time entries in the period must be open assignments.

To set a timesheet template:

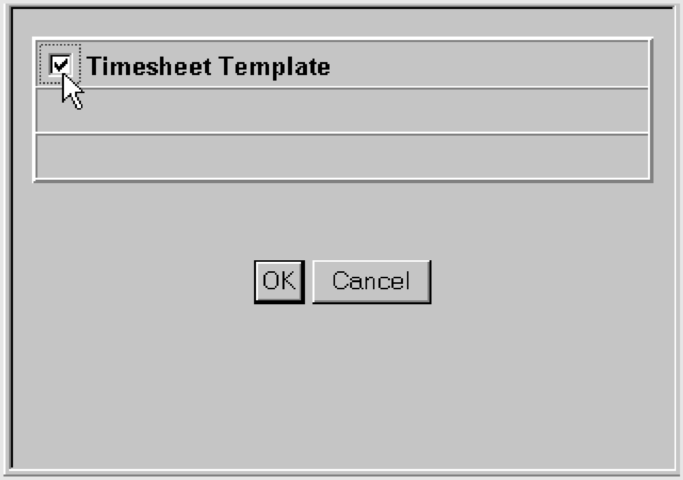


Figure 3.9

1. In your Timesheet, select a period that has the assignments and time entries you want in the template.
2. Click on the **Timesheet Template** icon  on the toolbar to open the Timesheet Template dialog box (Figure 3.8).
3. Click on the Timesheet Template check box to display a check mark.
4. To set the template and return to the timesheet, click on the **OK** button, or tab to the **OK** button and press Enter.

   When the template has been set, the words "Timesheet Template" display in red letters in the upper right corner of the timesheet.
5. To select a different period for a timesheet template, select the desired period. Click on the **Timesheet Template** icon. Then repeat steps 3 and 4 in the newly selected period.

   "Timesheet Template" will display in the upper right of the newly selected period. "Timesheet Template" will no longer display on the timesheet of the previously used period.

   NOTE You also can deselect a template by opening the Timesheet Template dialog box of the period you want to deselect, clicking the check box to remove the check mark, and clicking on **OK**.

CHAPTER 4

Working with Detail Code Information

Your company's TimeWizard administrator may have set up detail code fields for your timesheet. These fields enable you to attach different types of data to particular time entries. A detail code field associates default data with a time entry unless you attach a different detail code. If you are restricted from using the detail view of your timesheet, skip this chapter and proceed to Chapter 5.

Detail code fields and the lists of detail codes within them are customized for the types of information your company needs. For example, if your company's payroll manager wants TimeWizard to capture pay code information, your company can set up a detail code field titled "Pay Code," containing the detail codes "regular time" and "overtime." The detail code "regular time" would be the default code that is applied automatically to your time entries, unless you select the code "overtime" instead.

Detail codes can be used to show the cost center to be charged for the work, the customer for whom you did the work, the shift when you did the work, the location where did you the work, or any other type of data your company wants. TimeWizard can share this detailed information with other departments, such as Accounting, Payroll, and Human Resources.

Your company can set TimeWizard business rules that stipulate the availability of particular detail codes for specified employees or activities. For example, the detail code "overtime" may be available to some employees but not others, and "overtime" may be available only for certain assignments. In addition, timesheet rules can be set that restrict how an available detail code can be applied. For example, your timesheet may allow "overtime" to be applied only after eight hours of "regular" time have been saved for the day.

On your timesheet, detail codes display in one or more detail code rows under each assignment row. You can use multiple detail rows to break up the time you spent on one assignment and apply different detail codes to different parts of the time. Suppose you have a detail code field titled "Customer" that contains a detail code for each of your customers. If you worked three hours on Monday on the assignment "Customer Service," you could apply the detail code for one customer to one hour and the code for another customer to two hours by using two detail code rows.

NOTE

When you use the detail view of the timesheet, you can view all the detail code rows for all of your assignments. To view or use detail codes in the summary view, you must first expand the desired assignment row.

Objectives

1. Selecting a detail code for a new time entry
2. Inserting additional detail code rows
3. Entering a special amount or user field code
4. Editing detail code entries
5. Deleting a detail code row

Objective 1: Selecting a detail code for a new time entry

Each assignment on your timesheet has one or more detail code fields that are visible in the detail view of the timesheet or the expanded view of an individual assignment row. A single detail code row may contain multiple detail code fields, each for a different type of information (see Figure 4.1).

TimeWizard initially associates default detail codes (specified by your company's TimeWizard administrator) with your assignments. If more than one code is available in the drop-down list for a detail code field, you are not restricted to the default code and can select the appropriate code for the time entry.

Before changing to another view of any or all assignments, ensure that you have saved all timesheet transactions by clicking on the **Save Timesheet** icon.

To select a detail code other than the default code:

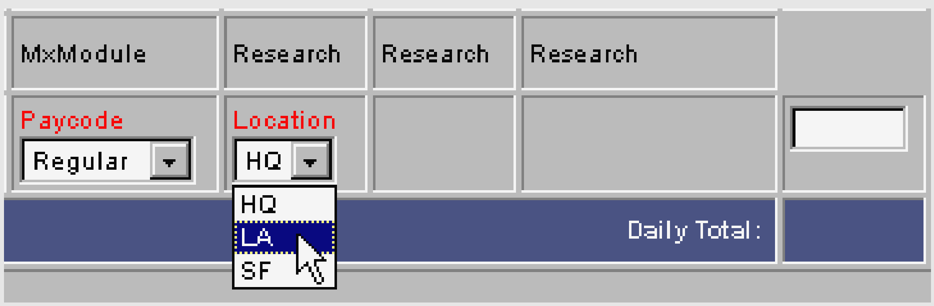


Figure 4.1

1. In the detail view of the timesheet or assignment row, locate the detail code field with the code you want to change.
2. Click on the detail code drop-down box and select the detail code you want to apply from the list.
3. Repeat step 2 for any other detail codes you want to change in the same detail code row.
4. Click in the time cell for that detail code row and the appropriate day and enter time.
5. Click on the **Save Timesheet** icon to save your time entry and detail code selections.

You may also enter time before changing the associated detail codes. In that case, you would save your transactions after selecting the detail codes instead of after entering the time.

When you save your transactions, the assignment row displays one additional detail row. This new row displays the default detail codes. When you enter time for the assignment for another day, enter the time in the detail row that you changed if it has the set of codes you need. Use the new default detail row if you need any codes not currently displayed in another row.

NOTE

An assignment cannot have two detail code rows that display the same set of detail codes. Each detail row for the assignment must display a unique set of codes.

Objective 2: Inserting additional detail code rows

In addition to selecting a detail code other than the default code, you can associate more than one detail code row with an assignment. For example, if you worked overtime for one assignment, you can enter the regular hours on one detail row and use a second detail row to add the overtime hours for the same assignment and day. For some types of detail data, you may need many detail rows for one assignment.

Because an assignment cannot have two detail code rows with the same set of detail codes, at least one code in a detail row must be different for its time entry to be saved. When the detail row is saved, the timesheet cell total is recalculated, and a default detail code row is added to the assignment.

If you need only one additional detail row for one assignment, you can use the default row that is added when you save your transactions. The Insert Detail function is an alternative method of adding one or more detail rows.

Use the Insert Detail function in the following cases:

- To select detail codes before entering time for two or more detail rows
- To add a detail row to multiple assignment rows at the same time

When you add a detail row to multiple assignment rows, you can select the same or different detail codes for the assignments.

NOTE

Save any unsaved transactions before clicking on the **Insert Detail** icon and before changing the timesheet view or assignment row view.

To insert additional detail code rows:

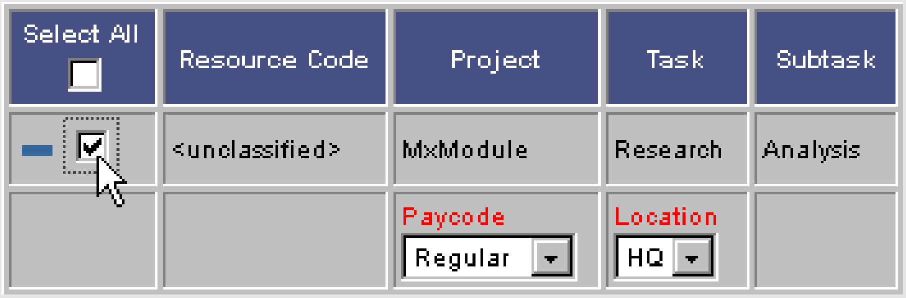


Figure 4.2

1. In the detail view of the timesheet or assignment row(s), click in the Select check box on the left of each unchecked assignment row to which you want to add a detail code row.
2. Deselect any other checked assignments by clicking in their check boxes to remove check marks.
3. Click on the **Insert Detail** icon on the toolbar to add one additional detail code row to each selected assignment.
4. Select the appropriate detail codes and enter time in the detail row(s).
5. Click on the **Save Timesheet** icon.

TIP

You can select all displayed assignments by clicking in a Select All check box, located at the top and bottom of the Select column.

Objective 3: Entering a special amount or user field code

If you have the appropriate preference settings, you can enter an expense amount and other detail data without predefined detail codes and associate this data with a timesheet entry. The special amount box can hold an expense or other monetary figure. The user field can hold any detail text up to 30 characters long (including spaces).

Like the predefined detail codes, a special amount or user field code is associated with a specific detail row. Unless you exclusively use the summary view, enter special amounts and user field codes in the detail view of the timesheet or the expanded view of the assignment row.

The special amount and user field boxes are located in the Transaction Note dialog box (Figure 4.3). Your company may use transaction notes and user field codes for different purposes. The presence of a transaction note, unlike user field codes and special amounts, can be easily seen when viewing a timesheet. Transaction notes may also be longer than user field text. See Chapter 7, "Attaching Transaction Notes and Summary Notes," for instructions on associating transaction notes with time entries.

To enter a special amount or user field code:

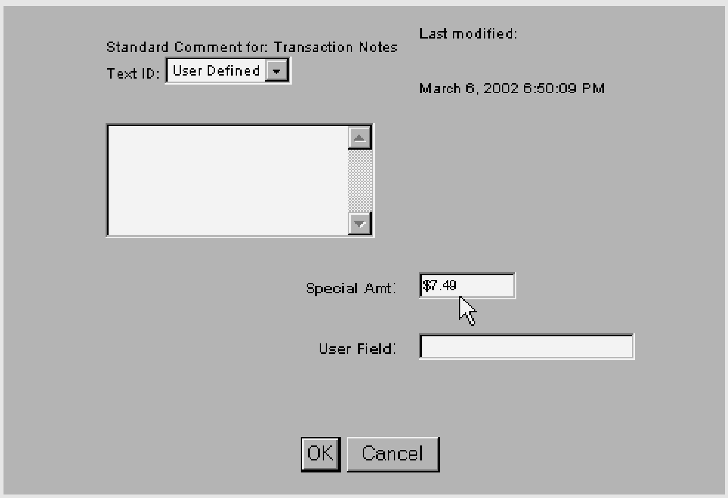


Figure 4.3

1. After saving a time entry, click on the pencil or notepad icon within the time cell to open the Transaction Note dialog box.
2. To enter a special amount, click in the Special Amt. box and enter the appropriate number after the currency sign.
3. To enter user field text, click in the User Field box and enter the appropriate text (including letters, numbers, or other characters).
4. Click on **OK** to save your entries and return to the timesheet.

Objective 4: Editing detail code entries

As long as a time cell is unlocked, you may change its associated detail codes. Unlocked cells have a white background.

Remember that the new set of detail codes cannot be exactly like any other detail row for the same assignment. Instead of editing the codes in one detail row to be exactly like another row, consolidate the time in one row and delete the other. See “Objective 5: Deleting a detail code row” to delete the unneeded row.

To edit detail code entries:

1. Click the detail code drop-down box of the code you want to edit and select the new detail code.
2. Repeat step 1 as needed to change other codes for the same assignment.
3. Click the **Save Timesheet** icon on the toolbar to save your changes.

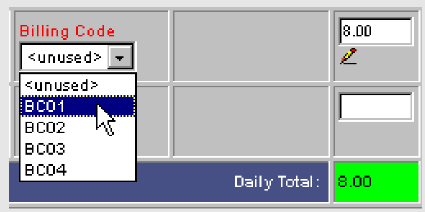


Figure 4.4

Objective 5: Deleting a detail code row

Clearing all the time entries in a detail code row allows you to delete the detail row from the assignment.

To delete a detail code row:

1. Expand the timesheet to the detail view or expand the assignment row you want to modify.
2. Clear the contents of all the time cells in the detail row you want to delete (see Chapter 3, “Objective 5: Clearing the contents of a cell”).
3. Click on the **Save Timesheet** icon. When the timesheet refreshes, the detail code row is deleted.

C H A P T E R **5**

Clocking In and Out

In the Clock-In/Clock-Out (CIO) timesheet, you can enter the start and stop times of your 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.

You must be designated as a CIO User in the Administrator application to use the CIO timesheet. As a CIO User, you will automatically receive the Clock-In/Clock-Out timesheet when you open your timesheet.

NOTE

Leave assignments, such as Vacation or Sick Leave, can be set for entry of an amount of hours rather than start and stop times. Assignments such as Lunch or Break Time can be set so that they do not add time to daily and period totals.

NOTE

As with the regular timesheet, you must save all timesheet transactions before exiting a CIO timesheet. You must also save your transactions before selecting another period, department, or employee, and before clicking any toolbar icon other than **Save Timesheet**.

By default, a TimeWizard property setting activates a safety feature to help you save your changes. The feature prompts you to save any unsaved changes when you attempt to exit or perform the actions listed above. You can save your changes or continue your action if you do not want to save them.

The CIO timesheet will not allow you to submit your timesheet unless each clock-in entry has a corresponding clock-out entry within the current period.

Objective

1. Clocking in and out

Objective 1: Clocking in and out

In your CIO timesheet, you can clock in and out many times during a day for the same assignment by inserting additional detail rows. Because the CIO timesheet adds a special detail code to an assignment, the other codes you select are allowed to duplicate the assignment's other detail rows.

The following rules apply to the CIO timesheet:

- You must enter a clock-in time before entering the corresponding clock-out time.
- A clock-in entry does not add time to totals until you save a corresponding clock-out entry.
- If you clock in for an assignment, you must clock out for that assignment before clocking in for another assignment.
- You cannot enter a clock-in or clock-out time that causes a span of work time to overlap another entered work span.
- You may apply a filter to hide an assignment row only if no time is entered for the assignment.

NOTE

TimeWizard automatically enters a code in the first detail code field to identify the detail row. You cannot edit this code. Because the CIO timesheet is a detail timesheet, you cannot change to a summary timesheet view or collapse the assignment row to hide this code.

NOTE

If you enter time manually using the AM/PM time format and do not enter "AM" or "PM," TimeWizard will automatically insert "AM" for the entry. You can edit this designation.

For information on editing time cell entries, see Chapter 3, Objective 4, "Editing time entries" and Objective 5, "Clearing the contents of a cell."

For information on using detail code rows, see Chapter 4, "Working with Detail Code Information." Though you may insert detail rows and log times to them in the CIO timesheet, you may not change the selection of detail codes in the rows.

To add a new assignment to your timesheet, follow the steps in Chapter 5, Objective 2, "Adding assignments to your timesheet."

To clock in and clock out:

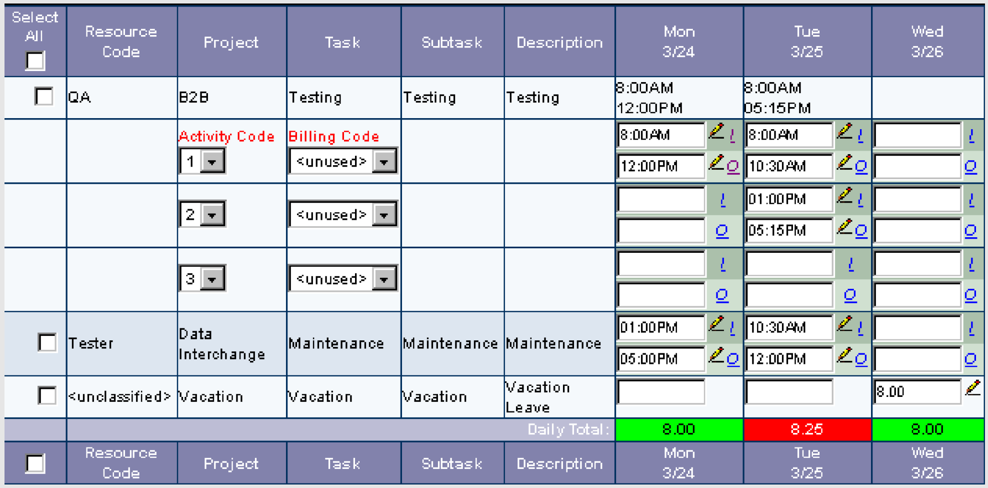


Figure 5.1

1. In the desired time cell, do one of the following:
   - Click "**I**" to automatically enter the computer's time as your "in" time or start time.
   - Click "**O**" to automatically enter the computer's time as your "out" time or stop time.
   - Manually enter your in time next to the "**I**" or your out time next to the "**O**." Include a colon (:) between the hour and the minutes. Include "AM" or "PM" if you use the AM/PM time format.
2. To enter time for leave and other activities that display one cell instead of an "**I**" cell and an "**O**" cell, manually enter the amount of hours instead of a time of day.
3. To clock in to the same assignment more than once for the same day, insert an additional detail code row as many times as needed.
4. Click **Save** to save the entries.

TIP

If you work past midnight on an assignment, so that your work spans more than one day, you can clock out on a different day than your clock-in time. To accomplish this, enter midnight as your clock-out time for the first day and enter midnight as the clock-in time of the subsequent day for the same assignment.

CHAPTER 6

Working with Assignments from the Timesheet

In the day-to-day management of your company, department and project managers break down your company's projects into a number of activities. These activities are assigned to specific employees, depending on their skills, areas of expertise, and availability. Using TimeWizard, your individual assignments display on your timesheet so that you can record the amount of time you worked on each assignment.

Assignments can be added to your timesheet in four ways:

- Your project manager or TimeWizard administrator can import assignments directly from an external project management system.
- Your department manager or TimeWizard administrator can add assignments from the TimeWizard Administrator application.
- Your department manager can add assignments to your timesheet from the manager's timesheet application.
- You can add assignments through your own timesheet, if you have the appropriate permission setting.

Objectives

1. Understanding resource assignments
2. Adding assignments to your timesheet
3. Using the Assignments Quickfilter
4. Sorting assignments on your timesheet
5. Deleting an assignment on your timesheet
6. Closing an assignment on your timesheet
7. Opening an assignment on your timesheet
8. Selecting multiple assignments on your timesheet

Objective 1: Understanding resource assignments

Assignments that are available to add to a timesheet are preceded by a resource code, which is usually a designation of a skill set or talent. A resource code can be specific, such as “Engineer,” “Writer,” or “Consultant,” or non-specific, in which case the designation is “<unclassified>.” A resource assignment is the combination of an activity from the database and a resource code.

In the TimeWizard setup process, your company decided to categorize resource assignments by specific resource codes, or to designate them all as unclassified, or to assign specific resource codes to some and “<unclassified>” to others.

If your company chose to assign specific resource codes, then an employee can only be assigned such an assignment if the employee has the corresponding resource code. For example, an employee must have the resource code “Programmer” to be assigned a “Programmer” resource assignment. An employee may have multiple resource codes.

Employees who have the preference setting to allow use of the unclassified resource code may add any available unclassified resource assignment to their timesheets (unless the activity is restricted by another TimeWizard feature). These employees may be assigned specific resource codes, as well.

NOTE

If an employee has the preference setting that restricts the employee to assignments with specific resource codes, the employee cannot add an unclassified assignment to the timesheet. However, the employee’s department manager can add an unclassified assignment to the employee’s timesheet in the Activities and Assignments area of the Administrator application.

Once a resource assignment has been assigned to a particular employee (that is, the assignment has been added to the employee’s timesheet), it is called an “employee assignment.”

Objective 2: Adding assignments to your timesheet

If you have the Add Assignment permission, you can select assignments from a list of available resource assignments and display your selections in the Time Reporting frame of your timesheet.

Available assignments are assignments that reflect your resource codes and are not on the timesheet you are currently using. You can also select unclassified assignments if you have the appropriate preference setting. If an assignment has been closed, it will only be available to you if you have the Open Assignment permission.

NOTE When you add an assignment to the timesheet, the assignment displays in all periods.

To add assignments to your timesheet:

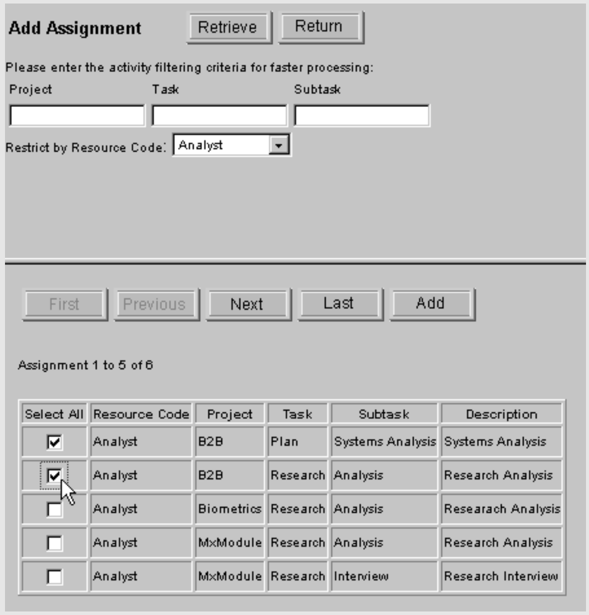


Figure 6.1

1. Click on the **Add Assignment** icon on the toolbar to open the Add Assignment dialog box.
2. Either click on the Restrict by Resource Code drop-down box to select the resource code of the assignments or use the displayed code.
3. To narrow the assignment list to be retrieved, see "Objective 3: Using the Assignments Quickfilter."
4. Click on the **Retrieve** button to display the list of available assignments that fit your resource code and Quickfilter criteria.
5. If the assignments you want to add are displayed, click in the check box of each desired assignment and proceed to step 7.
6. If the assignments you want are not displayed, click on the **Next** or **Last** buttons to display other parts of the list. You can also use the **First** and **Previous** buttons to navigate through the list.

   NOTE If you select any assignments, you must perform step 7 before displaying another part of the list or your check marks will be deleted.
7. Click on the **Add** button to add the selected assignment(s) to the timesheet.
8. When you have completed adding all desired assignments, click on the **Return** button to close the Add Assignment dialog box and return to the timesheet.

After adding assignments with one resource code to your timesheet, you can add assignments with another resource code before returning to your timesheet.

Objective 3: Using the Assignments Quickfilter

When you use the Add Assignment dialog box and have many available resource assignments, you can quickly retrieve the assignments you want by using the Assignments Quickfilter, located near the top of the window (Figure 6.2). Instead of navigating through a long list of assignments, you can use the Quickfilter to narrow the list.

The activity field names listed above the Quickfilter boxes are customized for your company. By entering a component of an activity name in one or more Quickfilter boxes, you can restrict the retrieved assignments to assignments that fit your search criteria. Not only will this reduce the number of assignments for you to look through, but it will also decrease the time to retrieve the list.

If you prefer to see all of your available resource assignments, leave the Quickfilter boxes empty.

You can enter part of a word or activity component name in a Quickfilter box, and TimeWizard will retrieve assignments that include that text in the corresponding activity field.

To use the Assignments Quickfilter:

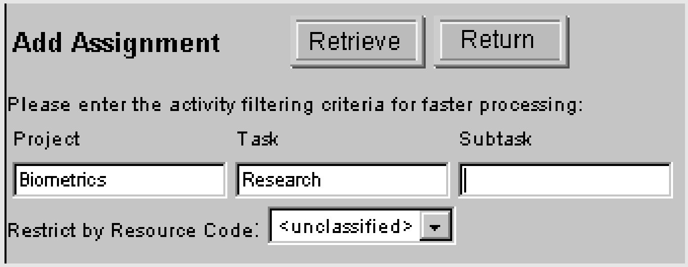


Figure 6.2

1. In the Add Assignment dialog box, click in a Quickfilter box (e.g., "Project") and enter the corresponding activity component for your search.
2. To narrow your retrieved list further, click in or tab to another Quickfilter box and enter the corresponding activity component.
3. When you have filled in as much of the activity name as you want, select a resource code in the Restrict by Resource Code drop-down box.
4. Click on the **Retrieve** button.
5. To refine your results or search for different assignments, edit the text in the Quickfilter boxes and click on **Retrieve**.

Objective 4: Sorting assignments on your timesheet

You can change the way your assignments are sorted on your timesheet. The Timesheet Sort feature is particularly useful when you have a large number of assignments. You can change both the sorting priorities and the sort order (ascending or descending).

Example of sorting priorities

Suppose the assignments on your timesheet are identified by a resource code, a project name, and a task name. In the first table below, the assignment rows are sorted first by the resource code. Within the groups of assignments with the same resource code, the assignments are sorted by the project name. So, the primary sort is by resource code and the secondary sort is by project.

Initial Sort

Resource Code	Project	Task
Analyst	Efficiency Report	Writing of Report
Analyst	Quality Report	Analysis of Research
Analyst	Quality Report	Writing of Report
Researcher	Efficiency Report	Statistics Collection
Researcher	Quality Report	Testing

Now, suppose you want to make project the primary sort so that all assignments for the same project are grouped together. Within those groupings, you want to sort by task, instead of by resource code. After you change the sorting priorities, the assignment rows display as in the table below.

New Sort

Resource Code	Project	Task
Researcher	Efficiency Report	Statistics Collection
Analyst	Efficiency Report	Writing of Report
Analyst	Quality Report	Analysis of Research
Researcher	Quality Report	Testing
Analyst	Quality Report	Writing of Report

In the second table, all of the assignments for the Efficiency Report project are grouped together, and all of the assignments for the Quality Report project are grouped together. Because task is now the secondary sorting priority, the resource codes are no longer in alphabetical order.

Sort Order

In addition to changing the sorting priorities, you can change the sort order of the assignments on your timesheet. The example above assumes that all of your assignment columns are sorted in ascending sort order, which is the default sort order. An ascending sort arranges items from the smallest number to the largest and from A to Z.

If you change the sort order from ascending to descending, names in columns will be arranged from the largest number to the smallest and from Z to A.

TimeWizard allows you to assign different sort orders to separate assignment columns. For example, you can sort a task column in ascending order and a customer number column in descending order so that your newest customers (with the largest ID numbers) display closer to the top of your timesheet.

Working with Timesheet Sort

Your TimeWizard administrator may have set a sorting priority and sort order for some or all of your assignment columns in the Administrator application. You can override those settings from your timesheet. When you open the Timesheet Sort dialog box for the first time, the Sorting Priorities box on the left displays the current settings. If you choose different settings, your selections remain in effect until you change them.

Sorting priorities take precedence over sort order. In the example above, the resource codes in the new sort do not appear to be in ascending order, because the sorting priorities of the Project and Task columns are determining the position of the assignments.

To sort assignments on your timesheet:

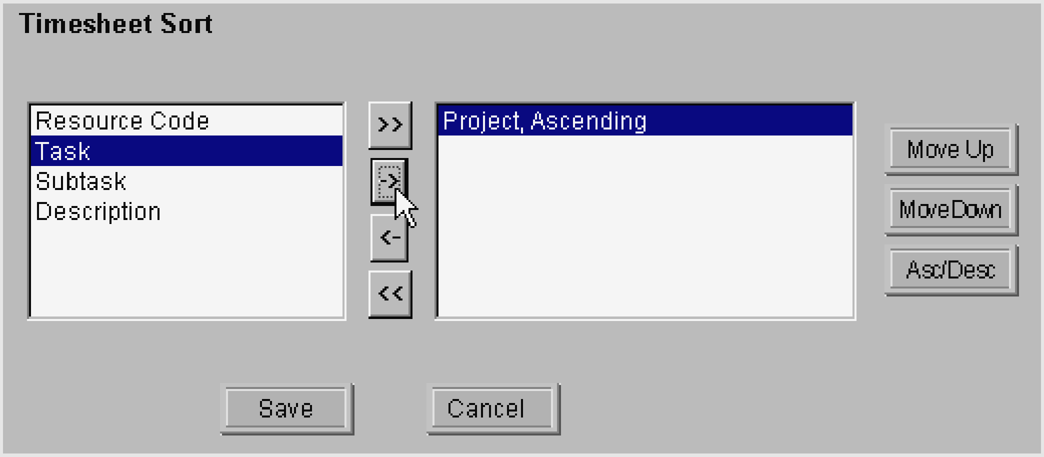


Figure 6.3

1. Click on the Timesheet Sort  icon on the toolbar to open the Timesheet Sort dialog box.
2. To include a column in the sort, select the name in the Column Name box on the left and click on the right arrow button between the boxes.

   The name moves to the Sorting Priorities box on the right.
3. To move all names from the Column Name box, click on the double right arrow button.
4. To remove a name from the sort, select the name in the Sorting Priorities box on the right and click on the left arrow button between the boxes.
5. To remove all names from the Sorting Priorities box, click on the double left button.
6. To set a sorting priority for a column, select its name in the Sorting Priorities box and click on the Move Up button or Move Down button as needed.

   The name at the top of the Sorting Priorities box will be the first column on the left of the timesheet after the settings are saved.
7. To change the sort order of a column, select its name in the Sorting Priorities box and click on the Asc/Desc button.

   An ascending sort will change to descending. A descending sort will change to ascending.
8. When you have set the sorting priorities and sort order as you wish, click on the Save button to save the settings and close the dialog box.

Objective 5: Deleting an assignment from your timesheet

NOTE

You can only delete an assignment from a timesheet if no time has been saved for that employee assignment in any period.

To delete an assignment on your timesheet:

1. Select the assignment you want to delete by clicking in the check box to the left of the assignment. (Skip this step if the box already displays a check mark.)
2. Deselect any other checked assignments by clicking their check boxes to remove check marks.
3. Click on the **Delete Assignment** icon  on the toolbar. When the timesheet refreshes, the assignment row is deleted.

Figure 6.4

Objective 6: Closing an assignment on your timesheet

When an assignment is closed, it is locked, meaning that no further transactions or edits can be applied to it. If you have the Close Assignment permission, you may close an employee assignment to show that all work for the assignment has been completed. Your manager might close an assignment for other reasons.

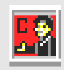
A closed assignment displays in red type. The PM Information window displays “CLOSED” along with the other PM data for the assignment.

NOTE

If you close an assignment that has no time applied to it in any period, it stays on the timesheet through the current period but does not display in future periods. If you close an assignment that does have time applied, the assignment does not display after the last period when time was applied.

You can open (or unlock) a closed assignment if you have the Open Assignment permission. See "Objective 7: Opening an assignment on your timesheet" for further information.

To close an assignment on your timesheet:

1. Select the assignment you want to close by clicking in the check box to the left of the assignment. (Skip this step if the box already displays a check mark.)
2. Deselect any other checked assignments by clicking their check boxes to remove check marks.
3. Click on the Close Assignment icon  on the toolbar.
4. When the timesheet refreshes, the assignment closes and displays in red type.

Objective 7: Opening an assignment on your timesheet

Opening a closed employee assignment unlocks the assignment row and allows you to resume entering time for the assignment.

If you have the Open Assignment permission, you can open a closed assignment in one of the following ways:

1. If the assignment is not displayed in the period you want to use, add the assignment from the Add Assignment dialog box to open the assignment. (See "Objective 2: Adding assignments to your timesheet.")
2. If the assignment is displayed in the period you want to use, follow the instructions in the box below.

To open an assignment on your timesheet:

1. Select the assignment you want to open by clicking in the check box to the left of the assignment. (Skip this step if the box already displays a check mark.)
2. Deselect any other checked assignments by clicking their check boxes to remove check marks.
3. Click on the Open Assignment icon  on the toolbar.
4. When the timesheet refreshes, the assignment opens and displays in black type.

Objective 8: Selecting multiple assignments on your timesheet

TimeWizard.*enterprise* enables you to select multiple assignments to apply any of the following functions:

- Insert Detail (for inserting additional detail code rows)
- Delete Assignment
- Close Assignment
- Open Assignment

NOTE: Using the Select All check boxes at the top and bottom of the Select column does not select any hidden assignments.

To select multiple assignments:

1. Select each desired assignment row that is not checked by clicking on its check box to enter a check mark.
2. Deselect any other checked assignments by clicking their check boxes to remove check marks.
3. You can select all displayed assignments by clicking either Select All check box.
4. Click the desired toolbar icon to apply a function to the selected rows.

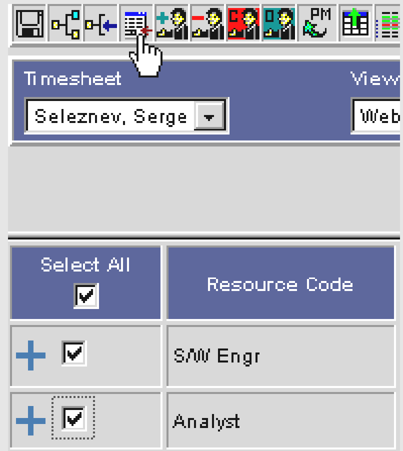


Figure 6.5

CHAPTER 7

Attaching Transaction Notes and Summary Notes

TimeWizard allows you to leave notes in your timesheet to communicate more fully with managers. A transaction note is text attached to a specific timesheet transaction. A summary note is text attached to a whole timesheet, that is, to a specific period. Although some TimeWizard features require you to leave notes, leaving transaction and summary notes is voluntary.

You can select a predefined standard note, or you can compose an original note. Your company may have set up a list of standard notes in TimeWizard for particular situations.

Objectives

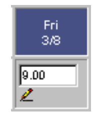
1. Attaching a transaction note to a timesheet transaction
2. Attaching a summary note to a timesheet
3. Editing a transaction note or summary note
4. Deleting a transaction note or summary note

Objective 1: Attaching a transaction note to a timesheet transaction

You can leave a transaction note for a time cell in the summary view or the detail view of the timesheet.

If you ever use the detail view or expand individual assignment rows, we highly recommend that you enter transaction notes only in the detail view or expanded view. A transaction note attaches to a specific detail time entry.

You can attach a different transaction note to each detail entry.

When time is initially saved in a timesheet cell, a pencil icon 

displays in the cell. If a transaction note is saved for the cell, the pencil icon becomes a notepad icon 

to indicate the presence of a transaction note.

In the Transaction Note dialog box (Figure 6.1), the "Last modified" section displays the login ID of the note author and the date and time the note was entered or last edited.

To select standard transaction notes and compose original transaction notes:

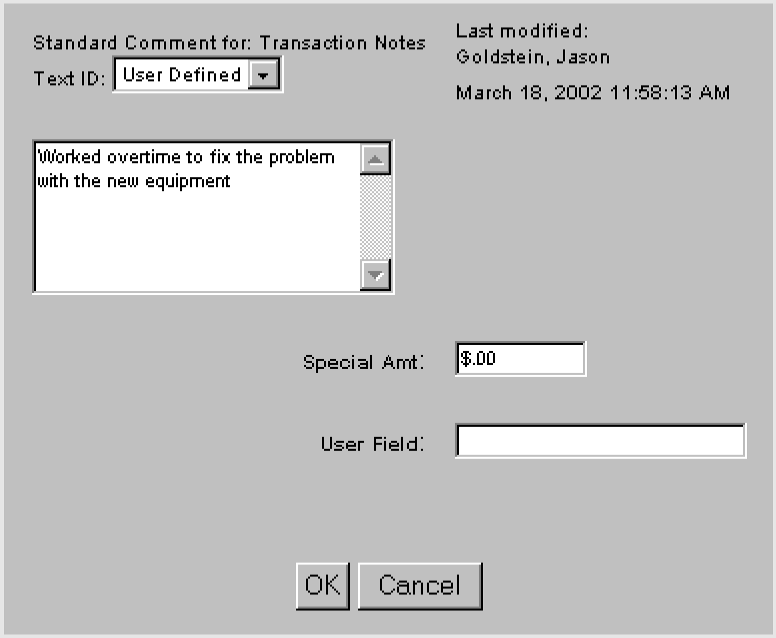


Figure 7.1

1. After time has been entered and saved, click on the **Transaction Note** pencil icon in the desired time cell to open the Transaction Notes dialog box.
2. In the dialog box (Figure 6.1), click on the Text ID drop-down box and select a standard note name or "User Defined."
   - A standard note has pre-entered text.
   - A user-defined note is a note you to compose when needed.
3. If you selected the name of a standard note, the dialog box refreshes and the note text displays in the large text box below the Text ID.
4. If you selected "User Defined," enter your note in the large text box below the Text ID.
5. Click on **OK** to save the note and close the dialog box.
6. To view a transaction note, click on the **Transaction Note** notepad icon in the appropriate cell to open the Transaction Notes dialog box.

For information about special amount and user field codes, see Chapter 4, "Objective 3: Entering a special amount or user field code."

Objective 2: Attaching a summary note to a timesheet

A summary note is attached to the whole timesheet and applies to a specific period. A "Summary Note Exists" label in the upper right of the timesheet indicates the presence of a summary note for that timesheet.

The "Last modified" section of the Timesheet Summary dialog box displays the login ID of the summary author and the date and time the note was entered or last edited.

To select standard summaries and compose original summaries:

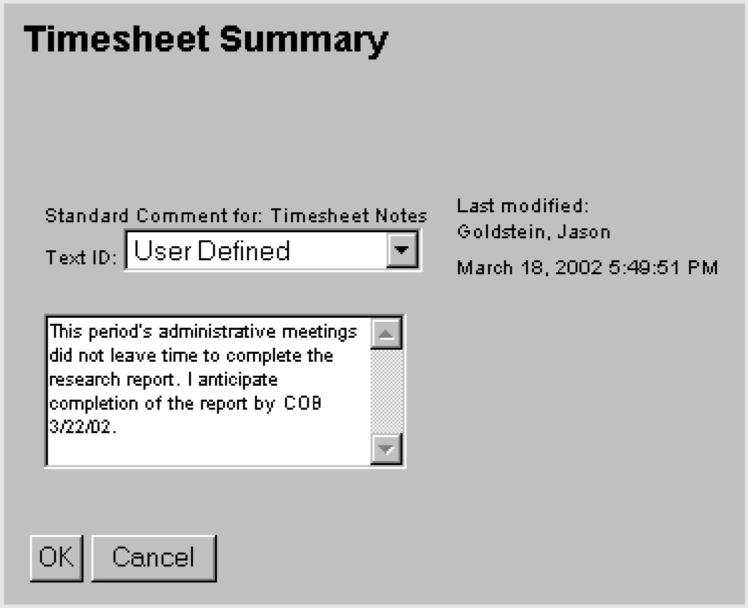


Figure 7.2

1. In the desired timesheet, click on the **Summary** icon  on the toolbar to open the Timesheet Summary dialog box.
2. In the dialog box, click on the Text ID drop-down box and select a standard summary name or “User Defined.”
   - A standard summary has pre-entered text.
   - A user-defined summary is a note you compose when needed.
3. If you selected the name of a standard summary, the dialog box refreshes and the note text displays in the large text box below the Text ID.
4. If you selected “User Defined,” enter your summary note in the large text box below the Text ID.
5. Click on **OK** to save the note and close the dialog box.
6. To view a summary note, click on the **Summary** toolbar icon to open the Timesheet Summary dialog box.

Objective 3: Editing a transaction note or summary note

As long as a time cell is not locked, you can edit a transaction note attached to the cell. Similarly, as long as a timesheet is not in Read Only mode, you can a edit a summary note attached to the timesheet.

If you make an edit after the specified audit time has elapsed, the TimeWizard database saves records of the old and new notes. (Audit time is set in the global preferences of the Administrator application.)

The "Last modified" section of the Timesheet Notes or Timesheet Summary dialog box displays the login ID of the editor and the date and time of the last edit.

To edit a transaction note or summary note:

1. Open the transaction note or summary note you want to edit.
2. To replace a standard or user-defined note with a standard note, click on the Text ID box and select the new note name. The dialog box refreshes and displays the new note text.
3. To replace a standard note with a user-defined note, follow the steps in Objective 1 for a transaction note or Objective 2 for a summary note.
4. To edit a user-defined note, do one of the following:
   - Click in the note text, use the backspace key as needed, and type the new text.
   - Highlight existing text you want to edit and type new text to overwrite the old text.
5. Click on **OK** to save your changes and close the dialog box.

Objective 4: Deleting a transaction note or summary note

As long as a time cell is not locked, you can delete a transaction note attached to the cell. Similarly, as long as a timesheet is not in Read Only mode, you can delete a summary note attached to the timesheet.

If you delete a note after the specified audit time has elapsed, the TimeWizard database saves a record of the note in the database, though the note does not display in the timesheet. (Audit time is set in the global preferences of the Administrator application.)

The "Last modified" section of the Timesheet Notes or Timesheet Summary dialog box displays the login ID of the editor and the date and time of the last change.

To delete a transaction note or summary note:

1. Open the transaction note or summary note you want to delete.
2. To delete a user-defined note, highlight all of the contents of the note. Press the delete key.
3. To delete a standard note, select "User Defined" in the Text ID drop-down list. After the dialog box refreshes, highlight all of the contents of the note. Press the delete key.
4. Click on **OK** to save your change and close the dialog box.

CHAPTER 8

Submitting Your Timesheet for Approval

In this chapter, you are introduced to the approval process. If you have the appropriate preference setting, you can submit your own timesheet for approval by authorized managers. Regardless of whether you can submit your timesheet, you can view your timesheet's approval history to track your timesheet's progress in the approval process.

Objectives

1. Understanding the approval process
2. Submitting your timesheet
3. Viewing approval history

Objective 1: Understanding the approval process

When your administrators set up the TimeWizard approval process, they decided to use either a department approval process or an integrated approval process. In the department approval process, authorized managers, usually department managers, approve or reject your entire timesheet for a selected approval period.

In the integrated approval process, department approvals are followed by activity approvals. In contrast to department approvals, authorized managers for activity approvals, usually project managers, approve or reject only specific assignment rows within your timesheet for a selected approval period.

Some managers are designated as "department owners." Your department owner can view your timesheet and all of the timesheets in the department. Depending on departmental permissions, a department owner may edit timesheet data and approve and reject timesheets in the department.

A manager who is designated as an "activity owner" can approve and reject time entries for all the employee assignments associated with the "owned" activity, regardless of the employee's department. An activity owner cannot edit a timesheet, unless the activity owner is also a department owner with edit permission.

Once you have completed all time entries for a specific approval period, and if you have the appropriate preference setting, you can perform the first step of the approval process by submitting your timesheet for approval. The submittal counts as the first timesheet approval. If you do not have the preference, your department owner can submit your timesheet.

Your organization has one or more TimeWizard timesheet rules that TimeWizard will check at submittal time. If your timesheet transactions violate a timesheet rule, you will be given the opportunity to correct your timesheet before completing the submittal. You will not have this opportunity if you have made other types of timesheet errors, such as entering the wrong number of hours or entering hours for the wrong assignment.

Department Approvals

If your organization uses the department approval process without using integrated approvals, the department approval process generally follows these steps:

1. The timesheet approval status on the right side of the Timesheet Status frame displays “Unapproved.” You enter time for the appropriate assignments.
2. When your timesheet for the period is complete, you or your department owner submits your timesheet for the approval period. After the submission, the timesheet data is locked so that it cannot be modified.
3. If your approval is the only one required, the timesheet approval status changes from “Unapproved” to “Approved,” and the timesheet is fully approved. If more than one approval is required, the timesheet approval status changes from “Unapproved” to “Pending,” and the timesheet is available for approval by department owners.
4. When the timesheet approval status is “Pending,” a department owner reviews the timesheet data and performs an approval or rejection. The department owner’s action affects your entire timesheet for the period.
5. If more than one department owner is required to approve your timesheet, the timesheet is held at each successive department level until each required approval is performed. For example, your timesheet may be approved by your department owner, then by your division approver, and then by a payroll approver.
6. If a timesheet is rejected, the timesheet approval status displays “Rejected,” and the timesheet is unlocked. You must explain or edit your timesheet data. The approval process begins again when you or your department owner resubmits the timesheet. The timesheet approval status then changes from “Rejected” to “Pending.”
7. When all required levels of department approval are performed, the timesheet approval status displays “Approved,” and your timesheet is fully approved for the period.

Table 7.1 explains the timesheet approval status designations used with the department approval process.

Table 8.1: Timesheet Approval Status in the Department Approval Process

Timesheet Approval Status	Department Approvals Explanation
Unapproved	The timesheet for the selected period has not been submitted for approval or the department approvals have 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, and the timesheet has not been rejected.
Approved	The timesheet for the selected period is fully approved, i.e., it has all required department approvals.
Rejected	The timesheet for the selected period has been submitted but has been rejected by a department owner. The timesheet is unlocked. The timesheet owner (or department owner) should correct and resubmit the timesheet.

Activity Approvals

In the integrated approval process, department approvals are performed first and are followed by activity approvals. The activity approval portion of the process generally follows these steps:

1. When all required levels of department approval are performed, the timesheet approval status displays "Pending." Your timesheet is not fully approved until all the assignments on the timesheet are approved.
2. The Select column (at the left of the Time Reporting frame) displays a graphic for each assignment row to show that the assignment approval status is "Pending."
3. An activity owner reviews the timesheet data and performs an approval or rejection for a specific assignment row (or rows) for the period.

4. The approval status graphic in the Select column changes to a graphic that symbolizes "Approved" or "Rejected" for each affected assignment row. Assignment rows with the "Approved" graphic do not require further approval.
5. If an assignment row is rejected, the timesheet data is unlocked. You must explain or edit the rejected assignment row data. The approval process begins again when you or your department owner resubmits the timesheet. The timesheet approval status then changes from "Rejected" to "Pending." The assignment approval graphic changes from the "Rejected" graphic to the "Pending" graphic.
6. When all the assignments on a timesheet are approved, the timesheet approval status displays "Approved," and your timesheet is fully approved for the period.

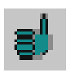
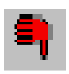
Table 7.2 explains the timesheet approval status designations used with the integrated approval process.

Table 8.2: Timesheet Approval Status in the Integrated Approval Process

Timesheet Approval Status	Integrated Approvals 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 assignment approval has been cleared (i.e., reset to "Unapproved"). The timesheet is unlocked.
Pending	The timesheet for the selected period has been submitted for approval but not yet fully approved, and neither the timesheet nor any assignment is in a rejected state.
Approved	The timesheet for the selected period is fully approved, i.e., the timesheet has all department approvals and all assignment approvals.
Rejected	The timesheet for the selected period has been submitted but 1) has been rejected by a department approver, or 2) one or more assignments 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.

Table 7.3 explains the assignment approval graphics used in assignment rows. When no approval graphic displays in the integrated approval process, the assignment row is unapproved.

Table 8.3: Assignment Approval Graphics

Assignment Approval Graphic	Explanation
	The yellow hand graphic, with the thumb to the side, symbolizes that the employee assignment row for the selected period has the status "Pending." The assignment row has been submitted for approval, and the activity owner has not yet approved this submission.
	The green hand graphic, with the thumb up, symbolizes that the submitted employee assignment row for the selected period has been approved by the activity owner.
	The red hand graphic, with the thumb down, symbolizes that 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 submit the timesheet again.

Objective 2: Submitting your timesheet

Once you have completed all time entries for a specific approval period, you may submit your timesheet for approval. If you do not have the preference setting to submit your own timesheet, your department owner will initiate the approval process for you.

If your organization uses the department approval process and requires only one department approval, your submittal will fully approve your timesheet for the period. If your organization uses the integrated approval process and requires only one department approval, your submittal will make your timesheet immediately accessible to activity approvers.

TimeWizard checks your timesheet for violations of TimeWizard timesheet rules when the submittal begins. An error message displays to let you know the type of error. You can then make corrections before proceeding with the submittal.

Review all timesheet transactions and associated detail codes to ensure accuracy prior to submitting your timesheet. Once your timesheet is submitted, it is locked. Though you can view a locked timesheet, you cannot edit any of the timesheet data.

When you complete the timesheet submittal, if any further approvals are required, the timesheet approval status changes from “Unapproved” (or “Rejected”) to “Pending.”

When your timesheet becomes locked, you cannot reverse or undo your timesheet submittal. Your department owner or activity owner may have the permission to “clear” your submittal (i.e., reset the timesheet approval status to “Unapproved”).

Submittal Notes

When you submit a timesheet for approval, you save a submittal note. Your organization may have set TimeWizard.*enterprise* to give you a choice between leaving a predefined standard note or composing an original note.

If your organization has not chosen to allow original submittal notes, submitting your timesheet will automatically save a standard submittal note.

If you have a choice between leaving a standard or original note, and you want to leave the standard note, you must select “Standard Comments” in the Timesheet Submission window before clicking on the **OK** button (Figure 7.1).

You can view your submittal note by using the approval history feature (see “Objective 3: Viewing approval history’).

To submit your timesheet:

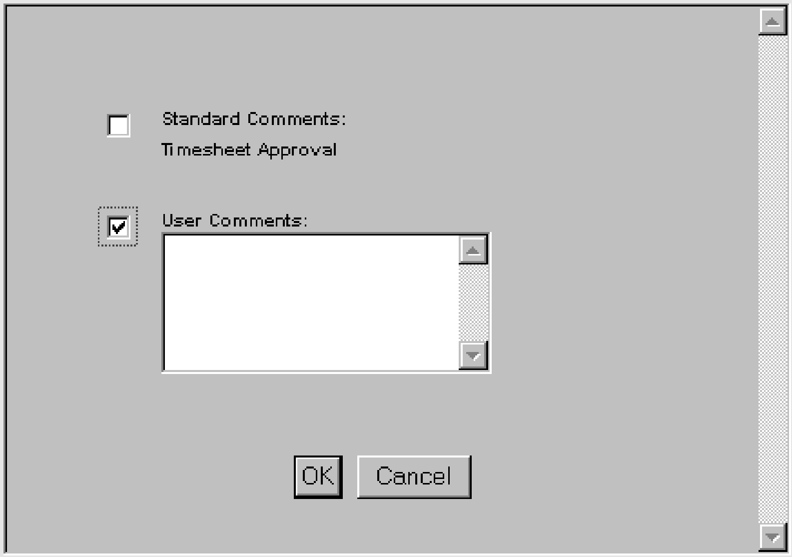


Figure 8.1

1. Complete and save your timesheet for the desired approval period.
2. Review all timesheet data to ensure accuracy.
3. Click on the **Submit Timesheet** icon  on the toolbar to submit your timesheet for approval.
4. If you have violated a timesheet rule, an error message will display. Click on the **OK** button in the message window to return to the timesheet. Correct your timesheet and repeat steps 2 and 3 above.
5. If you cannot leave an original submittal note, you receive a message that the approval process has begun. Click on **OK** in the message window to complete the submittal or click on **Cancel** to cancel the submittal. Either action returns you to the timesheet.
6. If you have a choice of note type and want to leave the standard note, select Standard Comments in the Timesheet Submission window (Figure 7.1).
7. To leave an original note, make sure User Comments is selected. Type your note in the large User Comments text box.
8. Click on **OK** to save your note and complete the submittal or click on **Cancel** to cancel both the note and the submittal. Either action returns you to the timesheet.

Objective 3: Viewing approval history

After your timesheet has been submitted for approval, you may view its approval history. The Approval History window displays records of the submittal and subsequent approve, reject, or clear approval actions.

If your organization uses the department approval process, the window displays the submitter's and department approvers' names, the type of action applied to the timesheet, the date and time of the action, and the notes. If your organization uses the integrated approval process, the window also displays the activity owners' names and each affected assignment for the activity approval portion of the process (see Figure 7.2).

To view approval history:

Departments	Approver	Action	Time Stamp	Comments
Self	Seleznev, Serge	Approve	2002-03-20 17:29:22.173	Not certain of 3/14 meeting time
Web Development	Shah, Jayesh	Approve	2002-03-20 17:31:50.267	Timesheet Approval

Resource	Project	Task	Subtask	Approver	*Action	Time Stamp	Comments
Analyst	B2B	Research	Analysis	Brown, Paul	Approve	2002-03-20 17:38:03.043	Timesheet Approval
S/W Engr	B2B	Plan	Meeting	Brown, Paul	Reject	2002-03-20 17:39:34.303	Change 3/14/02 meeting time to 6 hrs.

Return

Figure 8.2

1. In your timesheet, select the desired approval period.
2. Click on the **Approval History** icon on the toolbar to open the Approval History window for the selected period.
3. Review the approval history.
4. Click on the **Return** button to close the window and return to the timesheet.

CHAPTER 9

Making Historical Corrections

The Historical Correction process enables you to make changes to a timesheet in a closed period. If you have the Historical Corrections permission, you can add time to new assignments on your timesheet and modify time for existing assignments. This process does not alter the original data in the database; rather it maintains the original data and adds the corrective information along with the reason for the correction.

In the timesheet, indications of Historical Corrections include the following:

- A Historical Correction date stamp in the upper right of the Timesheet Status frame
- Transaction Note notepad icons in all added or edited time cells

NOTE: If a timesheet was submitted for approval before an Historical Correction is made, the timesheet must be resubmitted after the Historical Correction session. The resubmittal begins the approval process again. Until the corrected timesheet is resubmitted, its approval status is "Unapproved."

You can perform all of the following functions to one timesheet (i.e., one period) during the same Historical Correction session:

- Add one or more new assignments
- Add time and detail codes to one or more days for the new assignments
- Add time and detail codes to one or more days for existing open assignments
- Edit time and detail codes for one or more days for existing open assignments
- Enter and edit a summary note and transaction notes

Objectives

1. Making Historical Corrections to add assignments and time
2. Making Historical Corrections to modify existing assignments

Objective 1: Making Historical Corrections to add assignments and time

An Historical Correction session enables you to add new assignments to your timesheet in a closed period and enter time for the assignments. In the same session, you can also enter and edit time for previously-existing assignments.

To add assignments in a closed period:

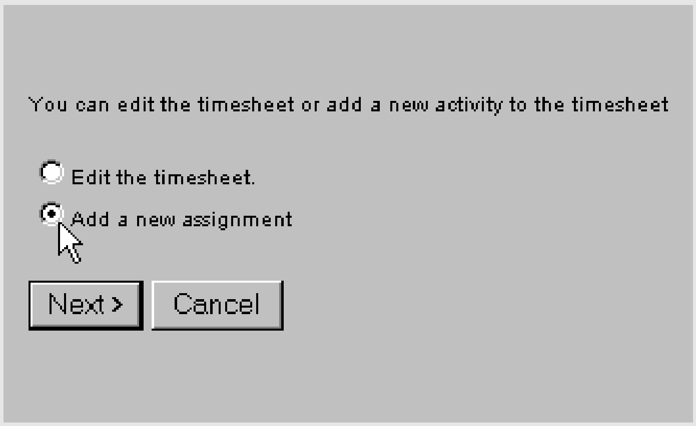


Figure 9.1

1. Select the closed period you want to correct.
2. Click on the **Historical Correction** Icon  on the toolbar to open the Historical Correction dialog box.
3. Select "Add a new assignment."
4. Click on the **Next** button to open the Add Assignment dialog box.
5. Add all the desired assignments (see Chapter 6, "Objective 2: Adding assignments to your timesheet" for more information).
6. Click on **Return** to return to the timesheet. The timesheet opens in the detail view unless you are restricted from using this view.
7. Continue with Objective 2, step 5, in this chapter to enter and edit time and notes and to save your changes.

NOTE

Do not click on **Save Timesheet** until you are ready to end the Historical Correction session.

Objective 2: Making Historical Corrections to modify existing assignments

During a Historical Correction session, you can enter and edit time for any open assignments. You can also enter and edit detail codes, a summary note, and transaction notes.

NOTE

If you want to enter or edit a summary note, you must do so **before** entering or editing time or detail codes.

At the end of your Historical Correction session, you are required to leave a note explaining the reason for the correction. This note will be applied to every transaction modified during the session. Although the Historical Correction note may appear to replace previously-existing transaction notes, previous notes are saved in the TimeWizard database.

TIP

If you want to enter a new transaction note, you can incorporate the note in your Historical Correction note, unless you do not want to attach the transaction note to other cells modified in the same session. Combining the two notes is particularly recommended when you want to attach a transaction note to new time entered during the session. Because saving the timesheet ends the session, and you must save before the transaction note icon displays, attaching a note to a new entry requires an additional session.

NOTE

Beware of the following actions, any one of which will end the session:

- Clicking on **Save Timesheet** before you want to end the session
- Changing the period
- Changing the department
- Changing the employee

After the session ends, the timesheet returns to “Read Only” mode. The approval status changes to “Unapproved,” unless no timesheet data changed during the session. You can make additional corrections by starting another Historical Correction session.

To modify time in a closed period:

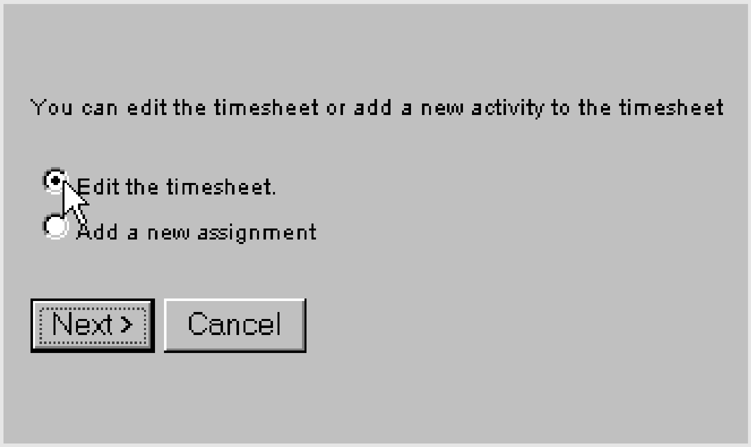


Figure 9.2

1. Select the closed period you want to correct.
2. Click on the **Historical Correction** Icon  on the toolbar to open the Historical Correction dialog box.
3. Select "Edit the timesheet."
4. Click on the **Next** button to return to the timesheet. The timesheet opens in the detail view unless you are restricted from using this view.
5. Enter or edit the summary note as needed.
6. Enter and edit time and detail codes as needed.
7. Enter and edit transaction notes for entries that display note icons, as needed.
8. When you have completed all corrections for the session, click on **Save Timesheet** to open the Historical Correction dialog box.
9. From the Text ID drop-down list, select a standard note or "User Defined." If you select "User Defined," enter an original note in the large text box.
10. Click on **OK** to save your note and timesheet changes.

CHAPTER 10

Working with the Expense System

The TimeWizard expense system enables you to record your business expenses easily and submit them for approval electronically. The expense system permission allows you to create reports in the expense system whether or not you use a timesheet.

Your TimeWizard administrator may have set a default currency type, such as US Dollar or Euro, for your expense entries. You can select another currency type when you enter an expense. TimeWizard includes all internationally recognized currency types.

If your company has set up TimeWizard to work with exchange rates, your expense report automatically performs exchange rate calculations for you. When you enter an expense with a currency type other than your default, the expense report displays the amount in the currency you selected and in your default currency.

Objectives

1. Adding a new expense report
2. Adding an assignment to an expense report
3. Adding an expense entry to an expense report
4. Submitting an expense report for approval
5. Editing an expense report
6. Deleting an expense report

Objective 1: Adding a new expense report

A report you create in the expense system can encompass expenses for a specific time-frame, a specific project, or any subject you wish.

After you define a new report, you add assignments to it. Then, you enter expense items in relation to the assignments. Objective 2, "Add an assignment to an expense report," describes the types of assignments you can use on an expense report.

To add a new expense report:

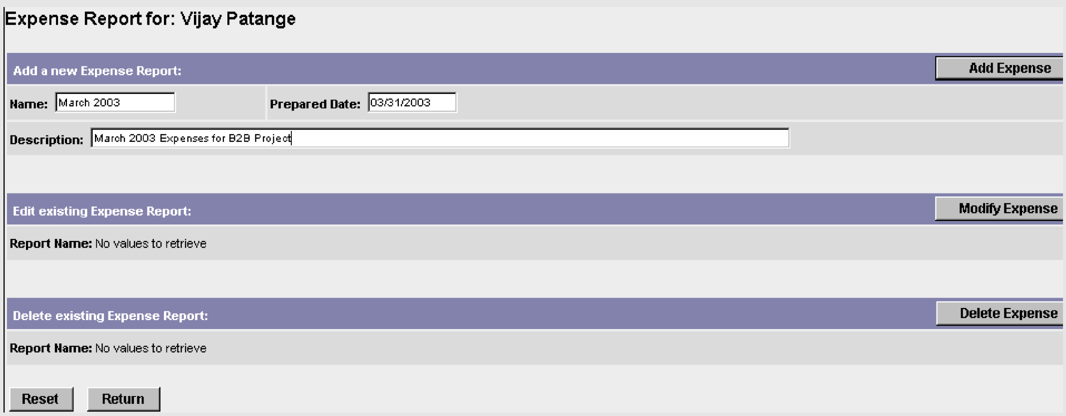


Figure 10.1

1. In the main navigation frame of your Employee Home Page, click the **Expenses** button to open the Expenses menu. Select Expense User to open the Expense Report window (Figure 10.1).
2. In the Name box, enter a unique name for the specific report you want to add.
3. In the Prepared Date box, enter the date you will prepare the report. Use the date format MM/DD/YYYY.
4. Enter a description of the report in the Description box (optional).
5. Click **Save** to save the report.
6. Click **Return** to go to your Employee Home Page or click **Add Expense** in the upper right to continue preparing the report.

Objective 2: Adding an assignment to an expense report

An assignment on an expense report can be any current timesheet assignment, a new assignment that you could add to your timesheet, or a special expense assignment. You can even add a closed assignment to an expense report.

An **expense assignment** cannot display on a timesheet and is used only in expense reports. The assignment name may include its expense type, such as “Airfare” or “Equipment Rental.”

NOTE

Consult your supervisior to learn whether or not your company uses expense assignments.

Each expense entry must be attached to an assignment row on the expense report. Each assignment row can have only one expense entry, but you can add the same assignment to the report as many times as needed.

Adding assignments to an expense report is very similar to adding assignments to a timesheet. The process has the following two differences:

1. You can add only one assignment to an expense report at a time.
2. The Add Assignment window for an expense report has additional filtering capabilities.

In the Add Assignment window for expense reports, you can select the “Show My Timesheet Assignments” filter if you want to retrieve only assignments on your timesheet and assignments that could be added to your timesheet. You can select the “Show Only Expense Assignments” filter if you want to retrieve expense assignments but not timesheet assignments. If you want to see both timesheet assignments and expense assignments in the Add Assignment window, do not select either of these two filters.

For more information on adding assignments, see Chapter 5, “Working with Assignments from the Timesheet,“ as well as the steps on the next page.

To add an assignment to an expense report:

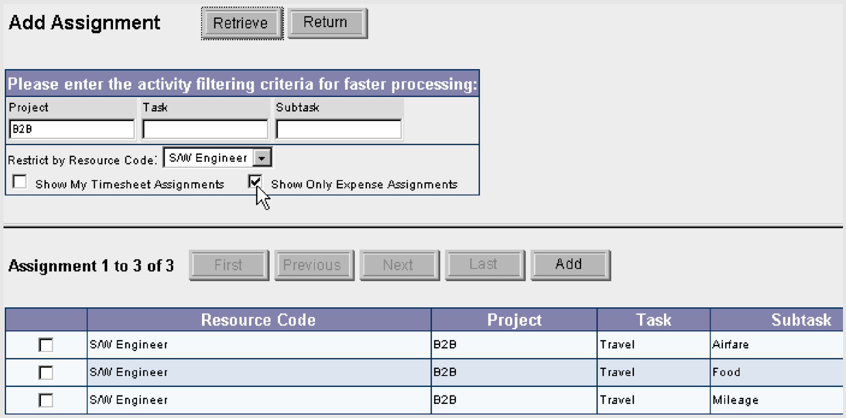


Figure 10.2

1. In the Expense Report window described in Objective 1, click **Add Expense** in the upper right to add an assignment to the new report.
2. In the Add Assignment window, select Show My Timesheet Assignments or Show Only Expense Assignments, if desired. Do not select either of these options if you want to retrieve both types of assignments in the window.
3. Add one assignment in the same way that an assignment is added to the timesheet.
4. Click **Return** to continue preparing the report. You must add an expense entry for the newly added assignment before you can add another assignment.

Objective 3: Entering an expense item on an expense report

When you add a new expense entry to an expense report, you provide detailed information about the expense item in the Add a new Expense Entry window. Table 10.1 explains the boxes and option selections in the window. Consult your supervisor to learn how your company uses the expense detail specifications.

Table 10.1: Expense Entry Window

Expense Detail	Explanation
Assignment	This row displays the assignment you selected. Your new expense entry will be attached to this assignment.
Expense Date	This box specifies the date you incurred the expense (which is most likely the date on your receipt). You must enter the expense date in the format: MM/DD/YYYY
Payment Type	The payment type determines whether the expense amount is added to or subtracted from the expense report total. Your company defines the payment types you can select.
Expense Type	This box specifies the category of the expense. Your company defines the expense types you can select. If you select an expense type that requires an expense rate, a rate will display in the Expense Rate box.
Expense Rate	This box specifies the default rate for an expense type that requires a rate. For example, for the expense type “mileage,” the rate per mile could be $0.36.
Custom Rate	This box specifies a rate to be used instead of the default expense rate for the specific expense entry.
Number of units	This box specifies the number to be multiplied by the rate to produce the expense amount. In the case of mileage, the unit is a mile.

Table 10.1: Expense Entry Window

Expense Detail	Explanation
Expense Amount	This box specifies the amount that will display in the Amount box on the expense report. To the right of the expense amount is the currency type of the amount. If TimeWizard is set up to use exchange rates, the rate is also displayed.
Comments	This box is available for user-defined text. Comments can be viewed by an approver only if the approver chooses to open the detailed view of the expense entry.
Receipt	This selection indicates whether a receipt will be submitted for the expense entry.
Billable	This selection indicates whether the expense fits the criteria to be billed to an external person or organization, usually a customer.

NOTE

The Expense Entry window can only display exchange rates that are in the TimeWizard database when you view an entry. Your company can change these rates. However, amounts on the expense report are based on the rates that were in the database when you saved the entry.

If you edit an expense amount after the exchange rates have been changed, the amounts on the expense report will be based on rates that were in the database when you saved the modification.

NOTE

Currency types that your company does not expect to use may display incorrect exchange rates. Consult your supervisor to learn which currency types you may select for your report.

To enter a new expense item:

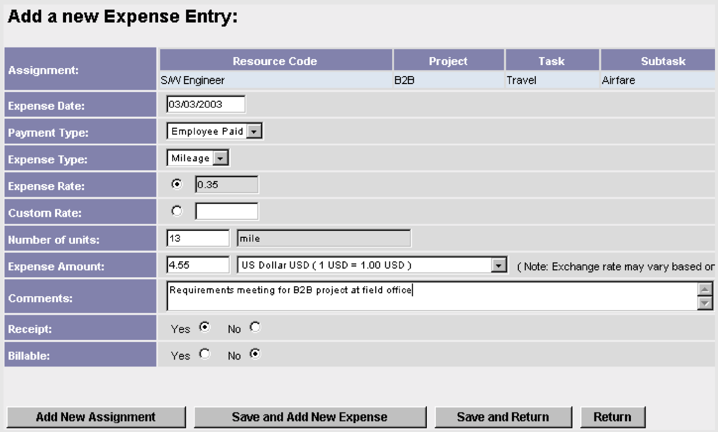


Figure 10.3

1. From the expense system Add Assignment window, click **Return**, or, from a specific expense report, click **Add Expense Entry**.
2. In the Add a new Expense Entry window (Figure 10.3), observe that the correct assignment is displayed.

   To change the assignment, click **Add New Assignment** and follow steps 2 - 4 in Objective 2.
3. In the Expense Date box, enter the date you incurred the expense (MM/DD/YYYY).
4. Click the Payment Type drop-down box and select a payment type from the list.
5. Click the Expense Type drop-down box and select an expense type from the list.
6. If the selected expense type uses a rate, the rate displays in the Expense Rate box. To use a different rate, select Custom Rate and enter the desired rate.
7. If a rate displays in either rate box, you can edit the number in the Number of Units box as needed.
8. If the expense does not use a rate, enter the amount of the expense in the Expense Amount box.
9. To change the currency type, click on the drop-down box to the right of the Expense Amount box and select a different currency.
10. You may add comments or additional details in the Comments text box.
11. In the Receipt selection, indicate whether a receipt will be submitted for the expense.
12. In the Billable selection, indicate whether the amount is to be billed externally.
13. Continue with the steps on the next page.

To add an expense entry to an expense report:

Figure 10.4

1. After following the steps on the previous page to enter a new expense item, do one of the following to save the entry and display it on the report:
   - To save the entry and go to the expense report, click **Save and Return**.
   - To save the entry and add a new expense entry that uses the same assignment, click **Save and Add New Expense**.
2. If you do not want to save the entry, do one of the following:
   - To cancel the entry and add a new assignment, click **Add New Assignment**.
   - To canel the entry and go to the expense report, click **Return**.

Objective 4: Submitting an expense report for approval

When you have completed all the entries for an expense report, you can submit the report for approval online.

NOTE

Review your expense report carefully before submitting it. Once an expense report is submitted, it is locked. Though you can view a locked expense report, you cannot modify the report data or delete the report.

The expense approval process

The submittal counts as the first approval. If any additional approvals are required, the report's approval status changes to "Pending," and one or more department owners review the report. If you use TimeWizard timesheets, then the approvers are the same department owners who have permission to approve your timesheet.

An approver can approve or reject the entire expense report, or the approver can approve or reject selected expense entries. If an entry or an entire report is rejected, the report's approval status changes to "Rejected."

When each expense row in the report has been either approved or rejected, and no rows on the report are pending, the rejected rows are unlocked. You can then edit the rejected rows and resubmit the report to start the approval process again.

When the entire report has been approved by all the required approvers, the report displays the status "Approved."

To submit an expense report:

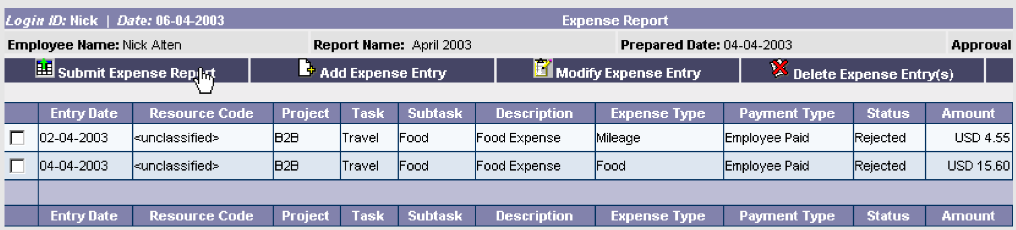


Figure 10.5

1. From the Expense Report window, click on the Report Name drop-down box in the Edit Existing Expense Report section, and select the specific report you want to submit.
2. Click **Modify Expense** on the left to open the report.
3. Review the report data to ensure accuracy.
4. Click **Submit Expense Report** on the upper left of the toolbar.
5. If you receive a message that the approval process has begun, click **OK** to complete the submittal or click **Cancel** to cancel the submittal.
6. If you have a choice of note type and want to leave the standard submittal note, select Standard Comments in the submittal window.
7. To leave an original note, make sure User Comments is selected. Type your note in the large User Comments text box.
8. Click **OK** to save your note and complete the submittal or click **Cancel** to cancel both the note and the submittal.

Objective 5: Editing an expense report

You can edit an expense report that has not been submitted for approval. You can also edit a report that has one or more rejected expense entries and no pending entries. Only rejected entries can be edited; you cannot edit approved entries.

To retrieve a report to modify:

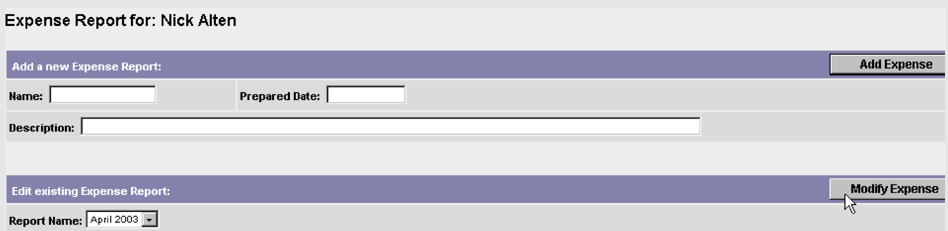


Figure 10.6

1. From your Employee Home Page, select Expense User from the Expenses menu to open the Expense Report window.
2. In the Edit existing Expense Report section (Figure 10.6), click the Report Name drop-down box and select the report you want to edit.
3. Click **Modify Expense** on the left of the window.
4. Follow the steps in the box on the next page.

To edit an expense report:

1. To add an additional expense entry for an assignment that is already on the report, select the assignment by checking the box on its left. Click **Add Expense Entry** on the toolbar (Figure 10.7a) to open the Add a new Expense Entry window.

Figure 10.7a

2. To add an expense entry for an assignment that is not on the report, make sure that no assignment row is selected. Click **Add Expense Entry** to open the Add Assignment window.

   After adding the assignment, click **Return** to open the Add a new Expense Entry window.

3. To modify data within an existing entry, select the assignment row. Click **Modify Expense Entry** on the toolbar (Figure 10.7b) to open the Modify the Expense Entry window.

Figure 10.7b

   To save your modifications and return to the report, click **Modify and Return** (Figure 10.7c).

Figure 10.7c

   To save your modifications and add an additional expense entry for the same assignment, click **Save and Add New Expense** (Figure 10.7d).

Figure 10.7d

4. To delete one or more rows from the report, select the rows and click **Delete Expense Entry(s)**.

Objective 6: Deleting an expense report

You can delete a report that has not been submitted for approval.

To delete an expense report:

1. From your Employee Home Page, select Expense User from the Expenses menu to open the Expense Report window.
2. In the Delete existing Expense Report section in the bottom of the window (Figure 10.8), click the Report Name drop-down box and select the report you want to delete.
3. Click **Delete Expense** on the left of the window.
4. A message window opens to confirm that you want to delete the report. Click **OK** to delete the report or **Cancel** to retain the report.

Figure 10.8

CHAPTER 11

Running Reports

The TimeWizard.*enterprise* reports feature enables authorized users to generate and print a wide variety of presentation-quality reports. Users can also save the reports in HTML, Microsoft Word, or Excel to send as email attachments or insert in other documents.

This chapter introduces you to the Reports window and explains how to run an attractively formatted Timesheet Report using the window.

To run other reports, see the *TimeWizard Guide to Reports*. To add reports to report categories, edit categories, or assign employees and categories to report category profiles, see the *TimeWizard Administrator's Guide*.

Objectives

1. Navigating the Reports window
2. Running a Timesheet Report in the Reports window

Objective 1: Navigating the Reports window

Your company's TimeWizard administrator preset your access to certain report categories, each of which contains a different group of reports. A typical access setting for most timesheet users is the Timesheet User report category.

Your company can modify the names of the report categories and the set of reports each category contains.

You print a report by using the print feature of your browser. You can also save a report as an electronic file for further use. The report can be formatted with your company's logo and can be generated in HTML, Microsoft Word, or Excel.

When you generate a report, you choose the data it will include by setting parameters. For example, to run some reports, you set the department parameter by selecting the departments whose data you want to include. For some other reports, you select a range of dates and the fields that describe your activities. The Reports window displays only the parameter types that you need to set for your selected report.

To navigate the Reports window:

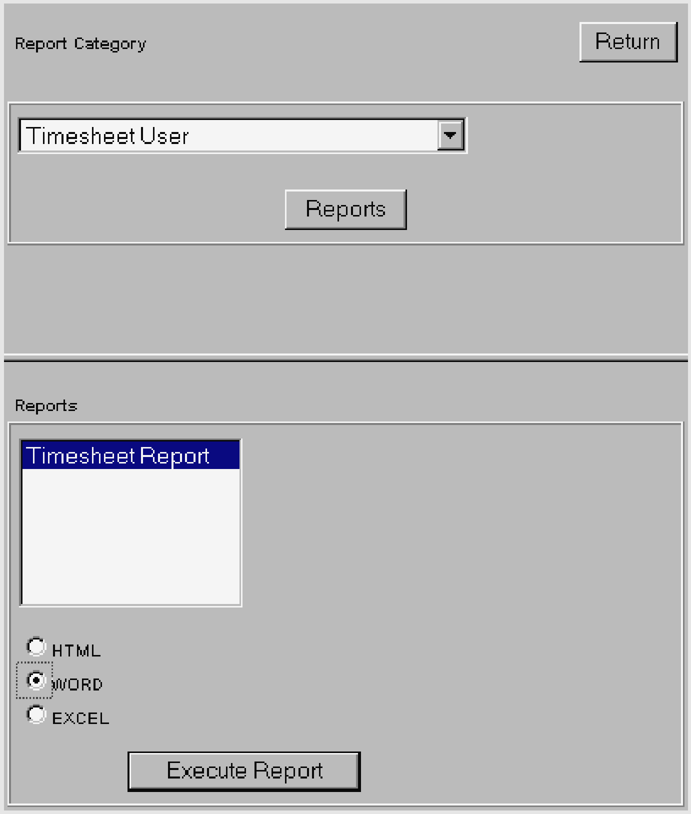


Figure 11.1

1. Click on the **Reports** button in the main navigation frame of your Employee Home Page to open the Reports window.
2. In the Report Category frame (Figure 9.1) in the upper left of the window, click on the drop-down box to select a category. Only your assigned categories display in the list.
3. Click on the **Reports** button to display the names of reports in the selected category.
4. In the Reports frame in the lower left, select a report from the list.
5. Below the Reports list, select the HTML, Word, or Excel format for your report.
6. Click on the **Execute Report** button to open the Report Parameters frame for the selected report on the right side of the window.
7. To set a parameter to run a Timesheet Report, see Objective 3.
8. To close the Reports window and return to your Employee Home Page, click on the **Return** button in the Report Category frame.

Objective 2: Running a Timesheet Report in the Reports window

The Timesheet Report displays your assignments with the associated transaction hours and detail codes for a specified approval period. Only assignments for which time has been entered for the selected period are included. The report also displays daily and period totals. Your employee ID, department code, and employee code are included at the top of the report.

The Timesheet Report requires you to set only one type of parameter, the end date of the period for which data will display.

The description below assumes that your company has retained the report category name “Timesheet User” and the report name “Timesheet Report.”

To run a Timesheet Report in the Reports window:

1. In the Reports window (Figure 9.1), select Timesheet User from the Report Category drop-down box.
2. Click on the **Reports** button.
3. Select Timesheet Report from the Reports list in the lower left.
4. Below the Reports list, select a file format for the report.
5. Click on the **Execute Report** button.
6. In the Report Parameters frame (Figure 9.2) on the right side of the window, select the end date of the period you want to include in the report.
7. Click on the **Preview** button to run the report. A new browser window opens to display the report results.
8. To print the report, select Print from the File menu of the browser.
9. To save the report, select Save As from the File menu and follow the usual procedure to save a file.
10. To exit the temporary window, select Close from the browser's File menu or click on the **X** in the upper right corner of the window.

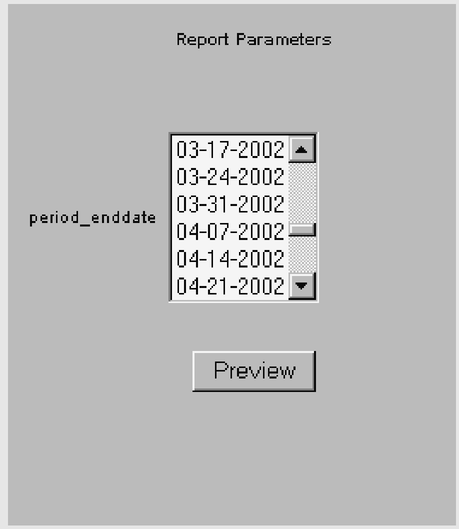


Figure 11.2

To learn to set parameters for other reports, see the *TimeWizard Guide to Reports*.

S E C T I O N   T W O

Managing the TimeWizard.*enterprise* Timesheet

As a manager with the appropriate permissions, you can view, edit, and approve or reject employee timesheet data. Employee timesheet data can be viewed in an approvals window or by navigating to an employee's timesheet. The data can be edited only by navigating to the timesheet.

Chapter 12, "Working in Your Employees' Timesheets," explains how to navigate to an employee's timesheet and view or edit the data.

The following chapter, "Understanding the Approval Process," explains the time approval process from a manager's point of view. The chapter discusses the roles of the various approvers, factors affecting the length of approval periods, and the two types of approval process.

Whether your company uses the department approvals process or the integrated approvals process, approvers will need the information in Chapter 14, "Approving and Rejecting Timesheets for Departments."

If your company uses the integrated approvals process, activity approvers will also need the information in Chapter 15, "Approving and Rejecting Timesheet Assignments."

Chapters 14 and 15 add one convention to this guide. The navigational path to certain settings in the Administrator application is shown with the ">" symbol. This symbol may be used to guide you from a window to a subwindow or from a menu to a menu item.

Example

TimeWizard Administrator > Preferences > Preferences Profile

The example tells you to go from the TimeWizard Administrator window to the Preferences window, and from the Preferences window to a Preferences Profile window.

Chapter 16 explains the approval process for expense reports created in TimeWizard's expense system. Employees can create expense reports in TimeWizard whether or not they use TimeWizard.*enterprise* timesheets.

CHAPTER 12

Working in Your Employees' Timesheets

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

Objectives

1. Viewing an employee's timesheet
2. Editing an employee's timesheet

Objective 1: Viewing an employee's timesheet

If you are designated as a department owner in TimeWizard, you can view the timesheets of employees in the departments you own. You can also view timesheets from "indirectly owned departments." These are departments which you do not own but which are owned by your departments in the department hierarchy.

Within a department, employees are listed alphabetically.

To view an employee's timesheet:

Figure 12.1

1. In the Timesheet Status frame, click on the View drop-down box (Figure 10.1) and select the department that contains the timesheet you want to view. Scroll down if needed.
2. The name of the first employee in that department appears in the Timesheet drop-down box and that employee's timesheet displays.
3. To view the timesheet of another employee in the same department, click on the Timesheet drop-down box and select the employee. Scroll down if needed.
4. To view another period for the selected employee, select the period end date from the Period End drop-down box.
5. To return to your own timesheet, click on the View drop-down box and select "SELF."

NOTE

When you choose another period and then select a different employee or return to your own timesheet, the timesheet that displays will show the period you chose.

Objective 2: Editing an employee's timesheet

If you have the departmental permission to edit other employees' timesheets, you can enter and edit time, detail codes, transaction notes, and summary notes in those timesheets.

If you have the departmental permission for timesheet functions, you can perform any of the following functions in other employees' timesheets:

- Add Assignment
- Delete Assignment
- Close Assignment
- Open Assignment
- Historical Corrections
- Edit ETCs

NOTE

Departmental permissions are assigned separately for your ownership of each department. You can have different permissions for different departments.

For example, in the Sales department, you may be able to perform timesheet functions, edit, and view timesheets. In Marketing, you may only be able to edit and view timesheets. In Public Relations, you may only be able to view timesheets.

The permissions you have for an indirectly owned department are the same as the permissions you have for the department that owns it.

When you view another employee's timesheet, the timesheet is initially in Read Only mode. To change the timesheet to the Edit mode, you are required to leave a note, called an employee edit note, to record your reason for editing another employee's timesheet.

To make an Employee Edit:

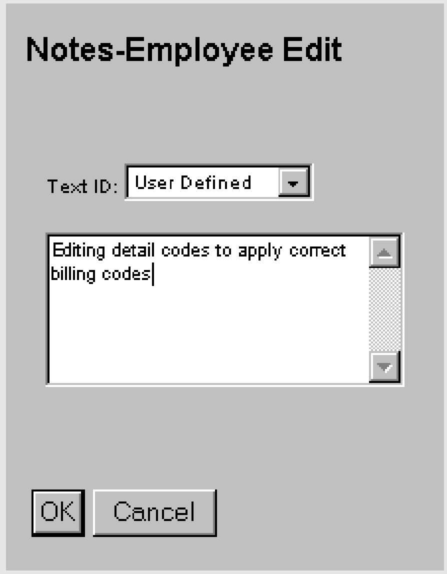


Figure 12.2

1. Select the employee and period for the timesheet you want to edit.
2. Click on the **Edit Timesheet** pencil icon  (to the right of the Cell Data box) to open the Notes - Employee Edit dialog box.
3. Click on the Text ID drop-down box to select the name of a standard note or “User Defined.”
4. If you selected “User Defined,” compose an original note in the large text box.
5. Click on **OK** to close the dialog box and change the timesheet to Edit mode.
6. Edit the timesheet as needed.
7. Click on the **Save Timesheet** icon to save your changes. When the timesheet refreshes, a notepad icon displays on each edited timesheet cell.
8. To view an employee edit note for an edited time cell, click on the **Transaction Note** notepad icon in the cell. (A notepad icon in a cell that has not been edited indicates a transaction note.)

CHAPTER 13

Understanding the Approval Process

Your TimeWizard Administrator set up TimeWizard to use one of the following approval processes:

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

This chapter will help you understand what the two approval processes are, how they are used, who the approvers are, and when timesheet data is locked and available for approval. Locked data cannot be modified except by authorized employees using an auditable correction process.

The next chapters of this section discuss how you can participate in the process of approving or rejecting your employees' timesheet data. Chapter 14, "Approving and Rejecting Timesheets for Departments," pertains to the department approval process. Chapter 15, "Approving and Rejecting Timesheet Assignments," pertains to the activity approval portion of the integrated 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 period have been entered), the employees submit their timesheets for approval. (Department owners will submit the timesheets of employees who do not have the preference setting to submit them.) Submitting a timesheet locks the timesheet data. See Chapter 8, "Submitting Your Timesheet for Approval."

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

Objectives

1. Understanding the two types of approval process
2. Understanding the approval hierarchies for each process
3. Understanding when or how often your company locks data

Objective 1: Understanding the two types of approval process

In a department-oriented 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 approval process, an approver can approve or reject timesheet data for members of a particular department. The approval or rejection is applied to all of the data on a timesheet for a selected approval period.

In an activity-oriented 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. The approval or rejection is applied only to the data for the employee assignments associated with a particular activity for a selected period. This is ideal for cross-functional project teams, whose members may belong to different departments.

In a combination environment, department managers and project managers both have a need to approve timesheet data. The integrated approvals process incorporates department approvals and activity approvals.

Regardless of which approval process your company uses, you can send timesheet data that has been validated by managers to a project management system, to Payroll, and to other corporate systems.

Objective 2: Understanding the approval hierarchies for each process

In either approval process, the approvers are accountable for timesheet data that will be used for business purposes. How the data will be used determines who the approvers should be.

For the sequence of timesheet approvals to commence, the timesheet data must first be submitted for approval. Based on your company's rules, a preference has been set that dictates whether timesheet owners can submit their own timesheets. If timesheet owners submit their timesheets, these individuals accept responsibility for their own timesheet entries. The submittal counts as the first department approval. 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 timesheet after the submittal can be a department manager or director and is the approver who validates the submitted timesheet data. If multiple approvals are required, each approval must occur at a successively higher department level in the TimeWizard department tree.

In an integrated approval 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 make the timesheet available for activity approvals.

In activity approvals, only one approval is required for each employee assignment per period. An employee's timesheet can include multiple assignments, and each assignment may be supervised by a different activity approver. An activity approver may be authorized to approve multiple activities and their associated assignments. Approvers are project managers who are ultimately responsible for validating the hours accrued for a project.

Objective 3: Understanding when or how often your company locks data

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

The length of the approval cycle in an activity-oriented environment depends on how you use your project management system. If you use a project management application, you establish automated updates of actuals from TimeWizard to your 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 "the end of each week," "the end of every two weeks," or any other time—determines 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 of a company that distributes paychecks biweekly but must update its project management system 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.

CHAPTER 14

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.

This chapter explains the department approvals process. If your organization chose the integrated approval process, please also see Chapter 15, "Approving and Rejecting Timesheet Assignments," for further information.

Your organization defined the levels of your department approval process when it set up the department hierarchy in TimeWizard Administrator and set the number of approvals required for employees in each department or approval unit. The department hierarchy or department tree (TimeWizard Administrator > Departments) 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. The submittal locks the timesheet data so that it cannot be modified without an auditable correction process.

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., resets) an approval, then the timesheet is unlocked and the approval process begins again. The timesheet owner or department owner makes any needed corrections in the timesheet and resubmits it.

NOTE

A timesheet with zero hours ("0.00") entered for a period requires approval if a special amount or user field code has been saved for the period.

Timesheet approval status

The Approval Status designation in the upper right of the timesheet displays the status of the timesheet at each stage of the approval process. Table 14.1 explains each designation for the department approval process. (If you use the integrated approval process, you can find additional information about the timesheet approval status in Chapter 15, "Table 15.2: Timesheet Approval Status").

Table 14.1: 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., 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, 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 is unlocked. The timesheet owner (or department owner) should correct and resubmit the timesheet.

Department approval methods

TimeWizard.*enterprise* offers two ways to manage department approvals, the Employee Summary method and the Approvals Inbox method. These methods are described in Objective 1, which also introduces the concept of group approvals. For further information on the Group Approve feature, see “Objective 2: Using the Employee Summary frame.”

Other features

As a department owner, you can access windows that allow you to view approval history and unsubmitted hours. You can view unsubmitted hours in the Collect Timesheets window, which allows you to force a submittal and to send an email message to the timesheet owner. If you also have the permission to clear approvals (i.e., reset approvals to “Unapproved”), you can open a window to clear department approvals and rejections.

If you can approve and reject timesheets, you are required to state a reason when you reject a submitted timesheet. When you clear an approval or rejection or you collect timesheets, you are also required to state a reason. Your reject statement or message text, which may be a user-defined or standard statement, can be read in the approval history.

When you approve or reject submitted hours, you can email the corresponding standard approval statement or your reject statement to the affected timesheet owners. When you clear approvals, you also can email a standard or user-defined statement to the affected timesheet owners. In the Collect Timesheets window, you can send email reminder messages to employees who have not submitted their hours or send notices that you have collected the employees’ timesheets.

Email notification requirements

To send email notification of an approval to a timesheet owner, the department approver must have the preference Send E-Mail on Approve (TimeWizard Administrator > Preferences > Preferences Profile). To send email notification of a rejection or cleared approval to a timesheet owner, the department approver must have the preference Send E-Mail on Reject (also set in a Preferences Profile).

Email notification also requires specific information to be entered in the timesheet owner’s and department approver’s Employee Detail windows. A user of the TimeWizard.*enterprise* timesheet must have the user’s fully-qualified Internet email address in the Domain text box of the Employee Detail window (TimeWizard Administrator > Employees > Employee Detail window). A user of the client/server timesheet must have the user’s email address (preferably a fully-qualified Internet email address) in the Email Login text box of the Employee Detail window.

Objectives

1. Understanding department approval methods
2. Using the Employee Summary frame
3. Using the Timesheet Summary frame
4. Using the Approvals Inbox
5. Showing approval history
6. Clearing approvals
7. Collecting timesheets

Objective 1: Understanding department approval methods

Depending on a TimeWizard.*enterprise* property setting, you can manage department approvals by using either the Employee Summary method or the Approvals Inbox method. What types of information you want to view and whether you want the option to approve timesheets as a group determine your choice of method. Following the descriptions of the methods is a comparison of the differences between the two.

Employee Summary method

The Employee Summary frame lists timesheets with the “Pending” status that you may approve. The timesheets are grouped by department. Within each department grouping, the timesheets are sorted by period ending date and, within each period, by employee name.

The Employee Summary displays the total hours of the listed timesheets by employee and by department for each period. If you have permission to perform a group approval, you can approve or reject either an individual timesheet or multiple timesheets in the Employee Summary frame.

Regardless of whether you can perform a group approval, you can navigate through the Employee Summary frame to the Timesheet Summary frame to review an individual timesheet in detail. The review timesheet enables you to read the timesheet’s transaction notes and project management (PM) data, expand the timesheet to view detail code data, and see each time entry. You can then approve or reject the individual timesheet in either the Timesheet Summary frame or the Employee Summary frame.

NOTE

The Employee Summary does not list any unsubmitted timesheets.

You can view total hours from unsubmitted timesheets and force the submittal of timesheets you select by using the Collect Timesheets feature. (To learn to use this feature, see “Objective 7: Collecting timesheets.”) You can also view timesheet hours by navigating through your timesheet to other employees’ timesheets.

Approvals Inbox method

The Approvals Inbox lists the timesheets with the "Pending" status that you may approve and also lists the following timesheets in your departments:

- "Unapproved" timesheets for current or past periods
- "Rejected" timesheets for any period
- "Reset" timesheets for which approvals have been cleared for any period

When the Approvals Inbox designates a timesheet status as "Reset," the user's timesheet shows the approval status as "Unapproved."

The timesheets are grouped by department. Within each department, you can sort by employee name (the default order) or by period ending date.

NOTE

The Approvals Inbox does not list any hours and does not allow any group approvals.

From the Approvals Inbox, you can open a review timesheet for any "Pending" timesheet and review the timesheet in detail. The review timesheet enables you to read transaction notes and project management (PM) data, expand the timesheet to view detail code data, and see each time entry. You approve or reject the individual timesheet in the review timesheet.

You can view total hours from unsubmitted timesheets and force the submittal of timesheets you select by using the Collect Timesheets feature. (To learn to use this feature, see "Objective 7: Collecting timesheets.") You can also view timesheet hours by navigating through your timesheet to other employees' timesheets.

Comparison of methods

Both department approval methods enable you to review a timesheet, its transaction notes, and PM data. Neither method enables you to approve or reject a timesheet that is not "Pending." The methods differ in what other information is presented, how information can be organized, and whether you can perform a group approval.

Table 14.2 summarizes the differences between the two methods.

Table 14.2: Managing Department Approvals

Method	Timesheets Listed	Sort Order	Total Hours?	Group Approve?
Employee Summary	"Pending" timesheets	Dept., period, employee	Yes	Yes
Approvals Inbox	All current or past timesheets not fully approved and all submitted future timesheets not fully approved	Dept., employee, period OR: Dept., period, employee	No	No

Objective 2: Using the Employee Summary frame

If your company uses the Employee Summary approval method, department owners have access to the Employee Summary and Timesheet Summary frames. The Employee Summary frame displays the total submitted hours for each employee in a selected department, grouped by period ending date (see Figure 14.2). The department total of submitted hours for each period also displays.

Only periods and employees for which timesheets have been submitted display. Timesheets that have been fully approved do not display in the frame. If no timesheets are available to approve, the frame displays, "No Timesheets Pending."

If you have the departmental permission to Group Approve, you can perform either group approvals or individual approvals in the Employee Summary frame. You can also perform individual approvals in the Timesheet Summary frame.

Department approvers who do not have the Group Approve permission can perform approvals only in the Timesheet Summary frame. However, any department owner can review data in both frames.

If your company uses the Employee Summary approval method, you can access the Employee Summary frame in the two ways described below. You access the Timesheet Summary frame from the Employee Summary frame.

To navigate to the Employee Summary frame:

Figure 14.1

1. Do one of the following:
   - In the main navigation frame of your Employee Home Page, click on the **Approvals** button and open the Department Approvals menu. Select Approve/Reject Timesheets to open the Department Approvals window.
   - On the left side of your Employee Home Page, click on the Approvals Pending link under the Department Approvals heading. The link only displays when timesheets are ready for your approval.
2. To display submitted hours for another department, click on the Department drop-down box in the top frame of the window (Figure 12.2). Select another department from the list.

   If you are authorized to view indirectly owned departments, the bottom of the drop-down list displays each of those departments with an asterisk (*).
3. Do one of the following:
   - See the following steps to approve or reject timesheets in the Employee Summary frame.
   - See Objective 3 to navigate to the Timesheet Summary frame and view timesheets in detail.
   - Click on the **Done** button in the lower right to return to your Employee Home Page.

When you approve or reject a timesheet, that employee row is immediately deleted from the Employee Summary frame. If higher-level approvals are needed to fully approve the timesheet, the employee row will display when the higher-level approvers log in and access the frame.

To approve or reject in the Employee Summary frame:

Figure 14.2

1. Navigate to the Employee Summary frame and select the desired department (see previous steps).
2. To select employee timesheets, click on the check box to the left of each employee whose timesheet you want to select. Use the vertical scroll bar to view other periods and employees in the list, as needed.
3. To select all timesheets in the Employee Summary frame, click on the **Select All** button in the upper left of the frame.
4. To approve the selected timesheets, click on the **Approve** button in the lower left frame.
5. To reject the selected timesheets, enter a user-defined reject statement in the text box in the lower right frame or click on the Reason drop-down box to select a predefined reason. Then click on the **Reject** button.
6. To return to your Employee Home Page, click on the **Done** button in the lower right or, to navigate to the Timesheet Summary frame, see Objective 3.

Objective 3: Using the Timesheet Summary frame

The Timesheet Summary frame (Figure 14.3) displays a detailed review timesheet for an individual employee and period you select. Transaction notes and PM data are accessible in this frame. Only timesheets with the "Pending" approval status are available.

In the Employee Summary frame, carefully choose the period you want to display in the Timesheet Summary frame. You can navigate to another employee's timesheet in the Timesheet Summary frame but not to another period.

To navigate to the Timesheet Summary frame:

Figure 14.3

1. In the Employee Summary frame (Figure 14.2), click on the **Detail Timesheet** icon to the left of the employee name for the period and timesheet you want to view.
2. In the Timesheet Summary frame (Figure 14.3), observe that the period, department, and employee name displayed in the upper left correspond with your choices.
3. To display a timesheet from another department, click on the Department drop-down box in the top frame of the window. Select another department from the list.

   NOTE: When you choose another department, the first employee in that department's drop-down list is automatically selected.

4. To display data for another employee—whether or not you changed the department—click on the Employee drop-down box in the top frame. Select another employee from the list.
5. Do one of the following:
   - See the following steps to approve or reject a timesheet in the Timesheet Summary frame.
   - Click on the **Return** button in the lower right to return to the Employee Summary frame. You can choose another period in the Employee Summary.
   - Click on the **Done** button in the lower right to return to your Employee Home Page.

When you approve or reject an employee timesheet, the timesheet is immediately deleted from the frame. The deleted timesheet is replaced in the Timesheet Summary frame by the next timesheet in the same department and period, unless no "Pending" timesheets remain for that department and period. (The "next" timesheet is the one that was listed in the Employee Summary after the most-recently displayed timesheet.)

If higher-level approvals are needed to fully approve the timesheet, the employee name will display when the higher-level approvers log in and access the Employee Summary frame, and the review timesheet will display in the Timesheet Summary frame when selected.

To approve or reject in the Timesheet Summary frame:

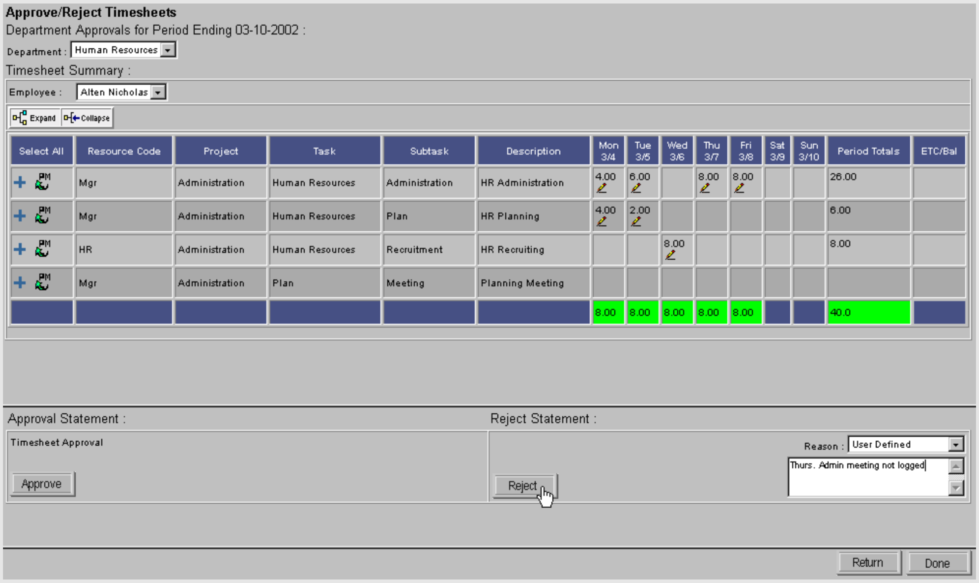


Figure 14.4

1. Navigate to the Timesheet Summary for the employee timesheet of the period you want to review (see previous steps).
2. To change to the Detail Timesheet view, click on the **Expand** (or **Detail View**) icon in the upper left of the timesheet.
3. To view detail code data for one assignment row, click on the **Expand** (or "**+**") icon on the far left of the row.
4. To view PM data for an assignment, click on the **PM** icon on the left of the row.
5. To view a transaction note, click on the **Transaction Note** notepad icon in the time cell.
6. To approve the timesheet, click on the **Approve** button in the lower left frame.
7. To reject the timesheet, enter a user-defined reject statement in the text box in the lower right frame or click on the Reason drop-down box to select a predefined reason. Then click on the **Reject** button.
8. After clicking on **Approve** or **Reject**, the next "Pending" timesheet in the department displays.

   To review a different employee's timesheet (for the same period) use the Department and Employee drop-down boxes in the upper left of the frame.
9. After approving (or rejecting) all desired timesheets for the period, do one of the following:
   - To return to the Employee Summary frame, click on the **Return** button in the lower right. You can choose another period in the Employee Summary frame.
   - To go to your Employee Home Page, click on the **Done** button in the lower right.

Objective 4: Using the Approvals Inbox

You can manage department approvals in the Approvals Inbox if you have permission to approve timesheets and your organization has set TimeWizard.*enterprise* to display the Inbox.

The Approvals Inbox groups timesheets by department. Within department groupings, you can choose to sort employee timesheets primarily by employee name or by period. The default sort order is by employee name.

You can access the Inbox through the Approvals Pending link under the Department Approvals heading on the left side of your Employee Home Page (Figure 14.5).

Figure 14.5

If your organization uses the Approvals Inbox, you cannot access the Approve/Reject Timesheets feature through the main Approvals menu. The Approvals menu enables you to use the Show Approval History, Clear Approvals, and Collect Timesheets features.

From the Approvals Inbox, you can open a detailed review timesheet of a timesheet that has the "Pending" approval status. Transaction notes and PM data are accessible in the review timesheet.

If you are an activity owner, you can open the activities approval window by clicking on the Approvals Pending link under the Activity Approvals heading on the left side of your Employee Home Page (Figure 14.5). For further information on the Integrated Approvals process, which includes activity approvals, see Chapter 13, "Understanding the Approval Process," and Chapter 15, "Approving and Rejecting Timesheet Assignments."

To use the Approvals Inbox:

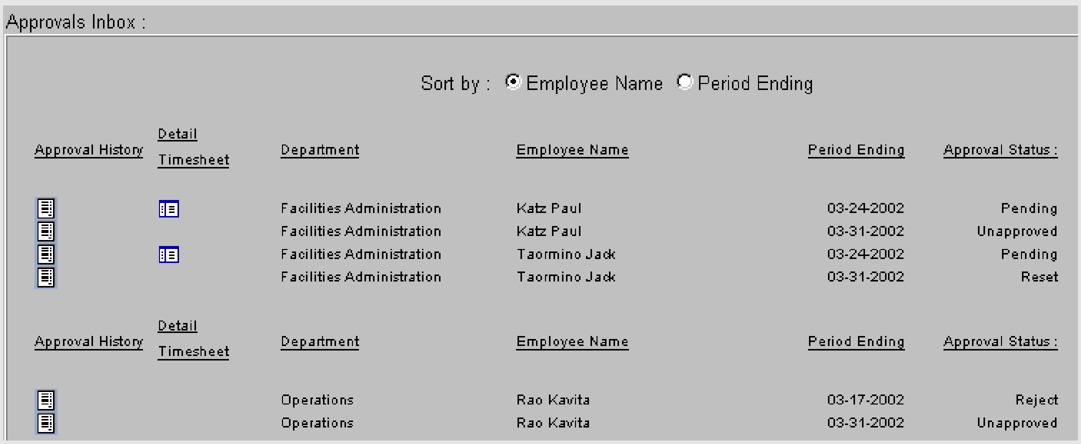


Figure 14.6

1. Click on the Approvals Pending link under "Department Approvals" (Figure 14.5) to open the Approvals Inbox.
2. To sort by period end date instead of by employee, select the Period Ending option at the top of the Inbox (Figure 14.6).
3. View the timesheet list, scrolling down if necessary.
4. To show the approval history of any listed timesheet, click on the Approval History icon at the far left of the timesheet row. The approval history of the selected timesheet displays at the bottom of the Approvals Inbox window.
5. To open a review timesheet, click on the **Detail Timesheet** icon immediately to the left of a "Pending" timesheet row.
6. To exit the Approvals Inbox and return to your Employee Home Page, click on the **Done** button at the bottom right of the Inbox.

When you approve or reject an employee timesheet, the review timesheet is immediately deleted from the frame. The deleted timesheet is replaced by the next timesheet in the Approvals Inbox, unless no "Pending" timesheets remain in the Inbox. (The "next" timesheet is the one that was listed after the most-recently displayed timesheet, in the sort order you selected.)

If higher-level approvals are needed to fully approve the timesheet, the employee name will display when the higher-level approvers log in and access the Approvals Inbox, and the review timesheet will display when selected.

To use the review timesheet from the Approvals Inbox:

Figure 14.7

1. To change to the Detail Timesheet View, click on the **Expand** (or **Detail View**) icon in the upper left of the timesheet.
2. To view detail code data for one assignment row, click on the **Expand** (or "**+**") icon on the far left of the selected row.
3. To view project management data for an assignment, click on the **PM** icon on the left side of an assignment row.
4. To view a transaction note, click on the **Transaction Note** notepad icon in the time cell.
5. To view another timesheet without returning to the Inbox, click on the Period End, Department, or Timesheet drop-down boxes and make a selection.
6. To approve the timesheet, click on the **Approve** button in the lower left frame.
7. To reject the timesheet, enter a user-defined reject statement in the text box in the lower right frame or click on the Reason drop-down box to select a predefined reason. Then click on the **Reject** button.
8. After clicking **Approve** or **Reject**, the next "Pending" timesheet in the Inbox displays.
9. Click on **Return** in the lower right of the window to return to the Inbox, or click on **Done**, also in the lower right, to exit the Inbox and go to your Employee Home Page.

Objective 5: Showing approval history

The Approval History feature enables you to view all the approval and rejection actions that have been applied to a submitted timesheet. Submittal notes and reject statements display with the approval history.

NOTE

When an approval or rejection has been cleared, the action is listed as "Reset."

Approval history in the Approvals Inbox

If your company uses the Approvals Inbox, you can view approval history in the Approval History window or in the Approvals Inbox.

To view approval history in the Approvals Inbox, follow these steps:

1. In the Inbox, locate the employee name and period for the timesheet approval history you want to view (see Figure 14.6).
2. Click on the **Approval History** icon to the far left of your chosen row.
3. Scroll to the bottom of the Inbox window to view the selected timesheet's approval history.

The Approval History window

All department approvers can view approval history of submitted timesheets in the Approval History window. The Approval History window displays employee names for a period and department that you select (Figure 14.8).

When you open an Approval History table for a specific timesheet, you can then navigate to a timesheet for another period or employee directly from the table view or by returning to the list of employees.

To show approval history:

Figure 14.8

1. In the main navigation frame of your Employee Home Page, click on the **Approvals** button and open the Department Approvals menu (Figure 14.1).
2. Select Show Approval History to open the Approval History window (Figure 14.8).
3. Click on the Period Ending drop-down box in the upper left to select another period from the list.
4. Click on the Department drop-down box in the middle frame to select another department.
5. Use the vertical scroll bar to view employee names in the list, as needed.
6. Click on the **Approval History** icon to the left of the employee whose timesheet approval history you want to display. An Approval History table displays for the selected timesheet.
7. After reviewing the data, you can remain in the table view and click on the Period, Department, and Employee drop-down boxes to display the approval history of another timesheet.
8. Click on the **Return** button to return to the employee list view, or click on the **Done** button to go to your Employee Home Page.
9. In the employee list view, select another period, department, or employee, or click on the **Done** button to go to your Employee Home Page.

Objective 6: Clearing approvals

If you have the Clear Approvals permission, you can reset existing approvals or rejections. Clearing approvals or rejections unlocks the timesheet and displays the approval status "Unapproved" until another submittal is performed.

NOTE

Clearing an approval or rejection clears all of the timesheet's approvals, from the initial submit to the highest-level approval.

Records of previous approvals and rejections are retained in the database.

The Clear Approvals window (Figure 14.9) displays the names of employees, in a selected department, whose timesheets have been approved or rejected for a selected period. When you clear the approvals (or a rejection) of a timesheet, the employee name is immediately deleted from the frame.

To clear approvals:

Figure 14.9

1. In the main navigation frame of your Employee Home Page, click on the **Approvals** button and open the Department Approvals menu (Figure 14.1).
2. Select Clear Approvals to open the Clear Approvals window (Figure 14.9).
3. Click on the Period Ending drop-down box in the upper left to select another period from the list.
4. Click on the Department drop-down box in the middle frame to select another department.
5. To select individual employees, click on the check box to the left of each employee you want to select. Use the vertical scroll bar to view employees in the list, as needed.
6. To select all employees in the Clear Approvals window, click on the **Select All** button above the employee list.
7. Enter a user-defined message in the Message Text box in the upper right of the window or click on the Message drop-down box to select a predefined message.
8. To clear approvals and rejections for the selected timesheets, click on the **Clear** button in the lower right of the window.
9. To select another period or department, click on the corresponding drop-down box and select the desired period or department from the list.
10. To return to your Employee Home Page, click on the **Done** button in the lower right of the window.

Objective 7: Collecting timesheets

The Collect Timesheets window (Figure 14.10) enables you to view total hours from unsubmitted employee timesheets and to force the submittal of timesheets you select. The window displays names of employees, in a selected department, who have unsubmitted timesheets for a selected period.

Timesheets can be selected for the current period or a past period, but not for a future period. Hours from timesheets that were not submitted, or were submitted and rejected, display in the window. If approvals have been cleared and not yet resubmitted, the corresponding employee timesheets also display.

When you collect a timesheet, the employee name is immediately deleted from the frame. If only one level of approval is required for the employee's department, the timesheet has the approval status “Approved.” If more than one level of approval is required, the timesheet displays in the Department Approvals window and has the approval status “Pending.”

You can send an email reminder message from the Collect Timesheets window to employees who have not submitted their hours or a notice that you have collected the employees’ timesheets.

To collect timesheets:

Figure 14.10

1. In the main navigation frame of your Employee Home Page, click on the **Approvals** button and open the Department Approvals menu (Figure 14.1).
2. Select Collect Timesheets to open the Collect Timesheets window (Figure 14.10).
3. Click on the Period Ending drop-down box in the upper left to select another period from the list.
4. Click on the Department drop-down box in the middle frame to select another department.
5. Use the vertical scroll bar to view employees and hours in the list, as needed.
6. Enter a user-defined message in the Message Text box in the upper right of the window or click on the Reason drop-down box to select a predefined message.
7. To select individual employees to receive your message, click on the check box to the left of each employee you want to select.
8. To send your email message to the selected employees without submitting their timesheets, click on the **Send Mail** button in the lower right of the window.
9. To submit the selected timesheets **and** send your message, click on the **Collect** button in the lower right of the window.
10. To select another period or department, click on the corresponding drop-down box and select the desired period or department from the list.
11. To return to the your Employee Home Page, click on the **Done** button in the lower right of the window.

CHAPTER 15

Approving and Rejecting Timesheet Assignments

In the integrated approval 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. If different assignments on one timesheet are owned by different activity owners, each activity's owner will need to perform an approval or rejection.

Unlike a department approver, an activity owner can approve time for employee assignments without owning the employee's department. (Activity ownership is designated in the Activity Approvals Pools area of TimeWizard Administrator.)

Once a timesheet has received all required department approvals, it becomes available to the authorized activity owners for approval or rejection of entire activities or specific 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.

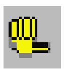
When an activity owner rejects the submitted hours or clears (i.e., resets) an approval, the timesheet is unlocked and the employee may correct the data. The timesheet must be resubmitted.

If the timesheet is modified before it is resubmitted, the approvals process, including department approvals, begins again. If no modification is made, the existing department approvals remain in place and activity approvals can continue after the timesheet is resubmitted.

Assignment approval status

After a timesheet has been submitted, a graphic displays in the Select column at the left of the timesheet assignment rows to show the status of each assignment at each stage of the process. Table 15.1 explains each assignment approval graphic.

Table 15.1: Assignment Approval Graphics

Assignment Approval Graphic	Explanation
	The yellow hand graphic, with the thumb to the side, symbolizes that the employee assignment row for the selected period has the status "Pending." The assignment row has been submitted for approval but the activity owner has not approved this submission.
	The green hand graphic, with the thumb up, symbolizes that the submitted employee assignment row for the selected period has been approved by the activity owner.
	The red hand graphic, with the thumb down, symbolizes that the submitted employee assignment row for the selected period has been rejected by the activity owner. The timesheet owner should correct the row and resubmit the timesheet.

Timesheet approval status

The Approval Status designation in the upper right of the timesheet displays the status of the timesheet as a whole. Table 15.2 explains each timesheet approval status designation.

Table 15.2: Timesheet Approval Status

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

Other features

All activity owners can access windows that display approval history and unsubmitted hours. Activity owners with the permission to clear approvals can open another window to clear activity approvals and rejections.

When you reject submitted hours, you are required to state a reason in the Activity Approvals window. When you clear an approval or rejection, you are required to state a reason in the Clear Approvals window. Your reject statement or message text, which may be a user-defined or standard statement, can be viewed in the approval history.

When you approve or reject submitted hours, you can email the corresponding standard approval statement or your reject statement to the affected timesheet owners. When you clear approvals, you can also email a standard or user-defined statement to the affected timesheet owners. In the View Unsubmitted Hours window, you can send email reminder messages to employees who have not submitted their hours.

Email notification requirements

Sending email notification of approvals and rejections requires some setup in the TimeWizard Administrator application. The setup requirements are the same for an activity owner as for a department owner and can be found in Chapter 14, on page 135.

Objectives

1. Navigate the Activity Approvals window
2. Using the Activity Summary frame
3. Using the Resource/Employee Summary frame
4. Using the Timesheet Summary frame for assignments
5. Showing approval history
6. Clearing approvals
7. Viewing unsubmitted hours

Objective 1: Navigate the Activity Approvals window

The Activity Approvals window displays submitted hours for each activity and approval period and presents the hours in the following three ways:

1. **By activity in the Activity Summary frame**

   Grouped by period and, within each period, totaled by activity

2. **By resource code and employee in the Employee/Resource Summary frame**

   Grouped by period for one selected activity; within each period, grouped by resource code; and, within each resource code grouping, totaled by employee

3. **By employee assignment in the Timesheet Summary frame**

   Itemized by employee assignment associated with a selected activity for one selected period, activity, and employee—with daily hours displayed for each detail code entry and period totals displayed for each employee assignment (includes the assignment description displayed on the timesheet)

   The Timesheet Summary frame for assignments does not necessarily display all assignment rows for the selected period and employee. Assignment rows associated with another activity do not display.

NOTE

An assignment row with zero hours (“0.00”) entered for a period requires approval if a special amount or user field code has been saved for the row and period.

The activity owner can approve an individual item or multiple items in any of the three views.

In the Activity Approvals window, activities may be identified by part of the activity name. Your organization chose to display the first, second, third, or fourth activity field or all four fields (set in TimeWizard Administrator > Global Preferences).

To navigate the Activity Approvals window:

Figure 15.1

1. On your Employee Home Page, do one of the following to open the Activity Approvals window:
   - In the main navigation frame, click on the **Approvals** button and open the Activity Approvals menu. Select Approve/Reject Activities.
   - On the left side of the page, click on the Approvals Pending link under the Activity Approvals heading. The link only displays when activities are ready for your approval.
2. View the Activity Summary frame (Figure 15.1). Use the scroll bar as needed.
3. Click on a selection icon to the left of an activity to navigate to the Employee/Resource Summary frame (Figure 15.3). View the frame, using the scroll bar as needed.

   To select another activity, click on the activity drop-down box in the top frame of the window.
4. Click on a selection icon to the left of an employee name to navigate to the Timesheet Summary frame (Figure 15.4). View the frame, using the scroll bars as needed.

   To select another activity, click on the activity drop-down box in the top frame.

   NOTE: If you change the activity, data for the first employee in the Employee drop-down list displays, regardless of your previous selection.

   To select another employee—whether or not you changed the activity—click on the Employee drop-down box in the top frame.
5. To return from the Timesheet Summary to the Resource/Employee Summary, click on the **Return** button in the lower right of the window.
6. To return from the Resource/Employee Summary to the Activity Summary, click on the **Return** button in the lower right.
7. In any window in the activity approvals area, click on the **Done** button in the lower right to return to your Employee Home Page.

Objective 2: Using the Activity Summary frame

The Activity Summary frame (Figure 15.2) displays the total submitted hours for each activity, grouped by period ending date. If you approve or reject at this level, you affect all of the employee assignments associated with the selected activity for the selected period.

NOTE

How an activity is identified for approval purposes (which parts of the activity name are displayed in the activity approvals windows) affects which assignments are tied to the selected activity.

Example

Company X uses two fields for activity names in the Administrator application and on timesheets. The first field contains project names, and the second field contains task names. Some of the activities are shown below.

Project A	Plan
Project A	Design
Project B	Plan
Project B	Design

The company's choice to display the contents of the project field, the task field, or both in the activity approvals windows determines which assignments are associated with a selected activity for approval purposes, as shown in Table 15.3.

Table 15.3: Assignments associated with an activity

Selected Activity	Associated Assignments
Project A (project field)	Project A - Plan; Project A - Design
Design (task field)	Project A - Design; Project B - Design
Project A - Design (both)	Project A - Design

When you approve or reject hours for an activity, the activity row is immediately deleted from the frame.

To approve or reject in the Activity Summary frame:

Figure 15.2

1. Navigate to the Activity Summary frame (see Objective 1).
2. Click on the check box to the left of each activity you want to select. Use the scroll bar to view activities and hours in the list, as needed.
3. To select all activities in the Activities Summary frame, click on the **Select All** button in the upper left of the frame.
4. To approve the selected activities, click on the **Approve** button in the lower left frame.
5. To reject the selected activities, enter a user-defined reject statement in the text box in the lower right frame or click on the Reason drop-down box to select a predefined reason. Then click on the **Reject** button.
6. To return to your Employee Home Page, click on the **Done** button in the lower right of the window.

Objective 3: Using the Resource/Employee Summary frame

The Employee/Resource Summary frame (Figure 15.3) displays the submitted hours for each employee, grouped by resource code and period ending date, for an activity you choose.

When you approve or reject hours for an employee, the employee row is immediately deleted from the frame.

To approve or reject in the Employee/Resource Summary frame:

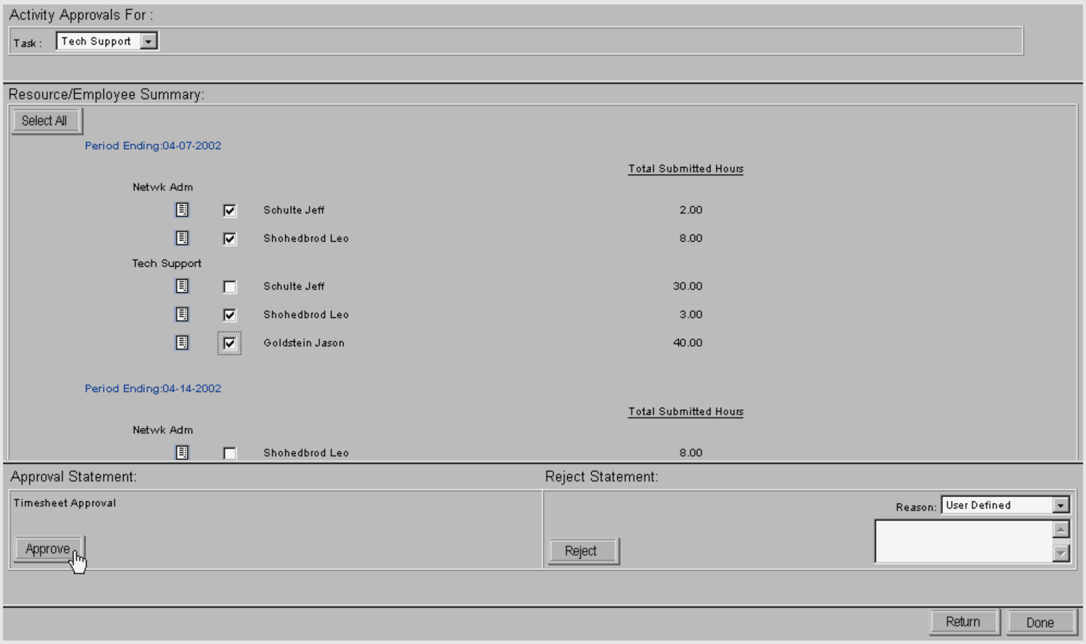


Figure 15.3

1. Navigate to the Employee/Resource Summary frame (see Objective 1). Observe that the activity displayed in the top frame corresponds with your choice in the Activity Summary frame.
2. Click on the check box to the left of each employee name you want to select. Use the scroll bar to view names in the list, as needed.
3. To select all employee names in the Employee/Resource frame, click on the **Select All** button in the upper left of the frame.
4. To approve the selected activities, click on the **Approve** button in the lower left frame.
5. To reject the selected activities, enter a user-defined reject statement in the text box in the lower right frame or click on the Reason drop-down box to select a predefined reason. Then click on the **Reject** button.
6. To remain in the Employee/Resource frame and view data for another activity, click on the activity drop-down box in the top frame and select the desired activity.
7. To return to your Employee Home Page, click on the **Done** button in the lower right of the window. To return to the Activity Summary frame instead, click on the **Return** button in the lower right. To navigate to the Timesheet Summary frame, see Objective 1.

Objective 4: Using the Timesheet Summary frame for assignments

The Timesheet Summary frame (Figure 15.4) displays the chosen employee's assignment total for each assignment in the period that is associated with a chosen activity. A daily breakdown by assignment and detail code row also displays.

When you approve or reject hours for an assignment, the assignment row is immediately deleted from the frame.

To approve or reject in the Timesheet Summary frame:

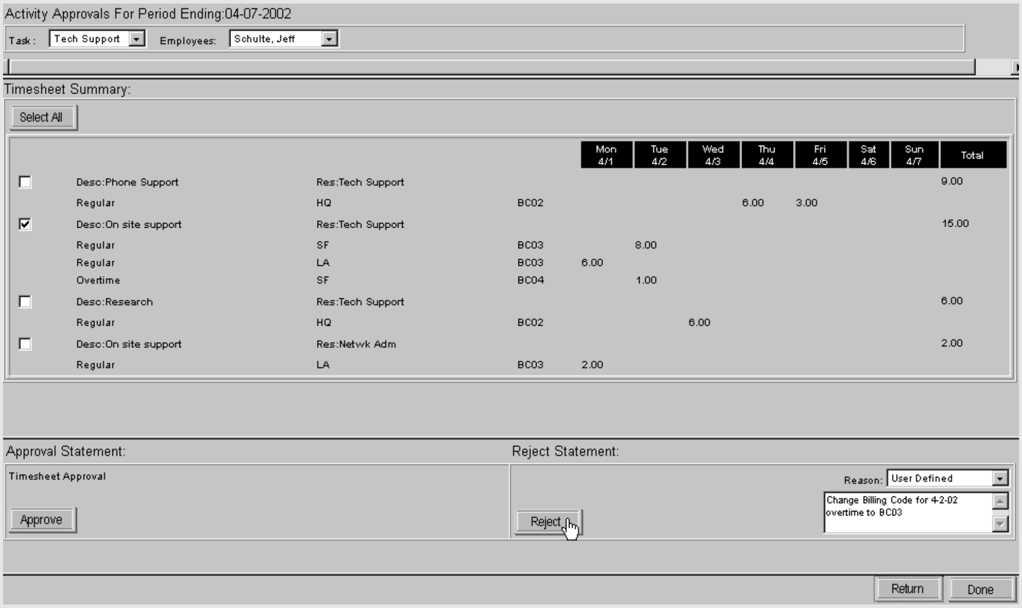


Figure 15.4

1. Navigate to the Timesheet Summary frame (see Objective 1). Observe that the period ending date, activity, and employee name displayed in the top frame correspond with your choices in the Employee/Resource Summary frame.
2. Click on the check box to the left of each assignment you want to select. Use the scroll bars to view assignments and hours on the timesheet, as needed.
3. To select all assignments in the Timesheet Summary frame, click on the **Select All** button in the upper left of the frame.
4. To approve the selected activities, click on the **Approve** button in the lower left frame.
5. To reject the selected activities, enter a user-defined reject statement in the text box in the lower right frame or click on the Reason drop-down box to select a predefined reason. Then click on the **Reject** button.
6. To remain in the Timesheet frame and view data of the same period for another activity, click on the activity drop-down box in the top frame. Select the desired activity.

   NOTE: If you change the activity, data for the first employee in the Employee drop-down list displays.

7. To remain in the Timesheet frame and view data of the same period for another employee, click on the Employee drop-down box in the top frame. Select the desired employee name.
8. To return to your Employee Home Page, click on the **Done** button in the lower right of the window. To return to the Employee/Resource Summary frame instead, click on the **Return** button in the lower right.

Objective 5: Showing approval history

The Approval History window for activity approvals enables you to view the approval history of employee assignments for which hours have been approved or rejected. Submitted hours that have never been approved or rejected will not display in the Approval History window for activity approvals (though these hours will display in the Approval History window for department approvals).

In the Approval History window, employee names are grouped by activity and period. Employee assignments are identified by the same parts of the activity name that are displayed in the activity approvals windows.

The Approval History table (Figure 15.5) for a selected assignment displays both the department approval history and the activity approval history for the assignment.

NOTE

When an approval or rejection has been cleared, the action is listed as “Reset.”

To show approval history:

Departments	Approver	Action	Time Stamp	Comments
Self	Schulte, Jeff	Approve	2002-04-10 16:51:41.907	
Human Resources	Alten, Nicholas	Approve	2002-04-10 16:58:20.088	Timesheet Approval

Resource	Project	Task	Subtask	Approver	*Action	Time Stamp	Comments
HR	Administration	Human Resources	Meeting	Brown, Paul	Approve	2002-04-11 16:30:49.043	Timesheet Approval
HR	Administration	Human Resources	Recruitment	Brown, Paul	Reject	2002-04-11 16:36:56.036	The 4-5-02 meeting is not logged.

Return

Figure 15.5

1. In your Employee Home Page, click on the **Approvals** button and open the Activity Approvals menu. Select Show Approval History to open the Approval History window.
2. Click on the Period Ending drop-down box in the upper left and select the desired period from the list.
3. Use the scroll bar to view activities and employees in the list, as needed.
4. Click on the **Approval History** icon to the left of the employee whose assignments and associated approval history you want to display. A second window opens to display the Approval History table (Figure 15.5) for the selected assignments.
5. After viewing the table, click on the **Return** button to return to the main Approval History frame.
6. Select another period and/or employee, or click on the **Done** button to return to your Employee Home Page.

Objective 6: Clearing approvals

If you have the Clear Approvals permission, you can reset existing approvals or rejections to "Unapproved." Submitted assignments that have never been approved or rejected by the activity owner do not display in the activity approvals Clear Approvals window. For this reason, you cannot clear the pending assignment graphic (the yellow hand) except in certain cases, e.g., when the assignment has been rejected and resubmitted. When an approval or rejection has been cleared, the corresponding timesheet assignment row does not display an assignment approval graphic until another submittal is performed.

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

The activities Clear Approvals window (Figure 15.6) displays the names of employees for whom employee assignments have been approved or rejected for a selected period. The employee names are grouped by activity. The activities are identified by the same parts of the activity name that are displayed in the other activity approvals windows.

When you clear approvals for a selected employee, you clear approvals for all of the employee's assignments that are associated with the activity in the selected period.

Records of previous approvals and rejections are retained in the database.

When you clear an activity approval or rejection, the assignment row is immediately deleted from the window.

To clear approvals:

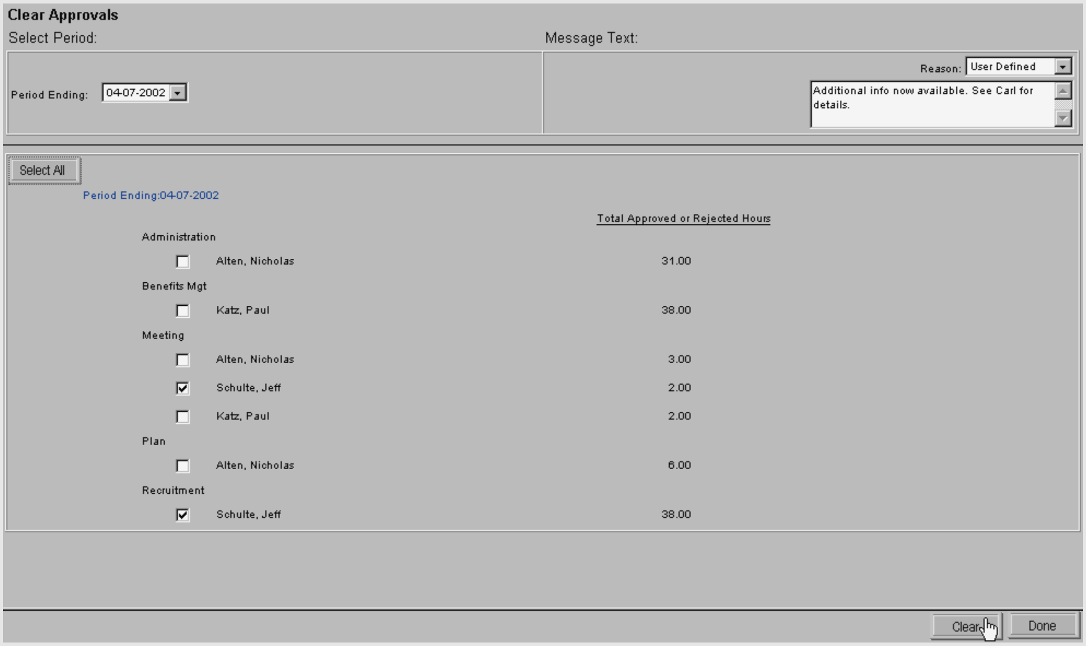


Figure 15.6

1. In your Employee Home Page, click on the **Approvals** button and open the Activity Approvals menu. Select Clear Approvals to open the Clear Approvals window.
2. Click on the Period Ending drop-down box in the upper left and select the desired period from the list.
3. Click on the check box to the left of each employee you want to select. Use the scroll bar to view activities and employees in the list, as needed.
4. To select all employees in the Clear Approvals window, click on the **Select All** button in the upper left.
5. Enter a user-defined message in the Message Text input text box in the upper right of the window or click on the Message drop-down box to select a predefined message.
6. To clear approvals and rejections for the selected activities, click on the **Clear** button in the lower right of the window.
7. To select another period, click on the Period Ending drop-down box and select the desired period from the list.
8. To return to your Employee Home Page, click on the **Done** button in the lower right of the window.

Objective 7: Viewing unsubmitted hours

The View Unsubmitted Hours window enables you to view total hours for employee assignments that have not been submitted or were submitted and rejected. If approvals have been cleared and not yet resubmitted, the corresponding employee assignments will also display in the Unsubmitted Hours window. The employee assignments listed in the Unsubmitted Hours window are not listed in any of the other activity approvals windows.

The Unsubmitted Hours window displays an employee name to represent all of that employee's assignments that are associated with a specific activity and period. Employee names are grouped by activity (as identified for activity approval purposes) for the selected period.

If you choose, you can send an email reminder message from the Unsubmitted Hours window to employees who have not submitted their hours.

If you are a department owner, you can navigate to the Collect Timesheets window through the Department Approvals menu to submit unsubmitted hours. See Chapter 14, "Objective 7: Collecting timesheets," for further information.

To view unsubmitted hours:

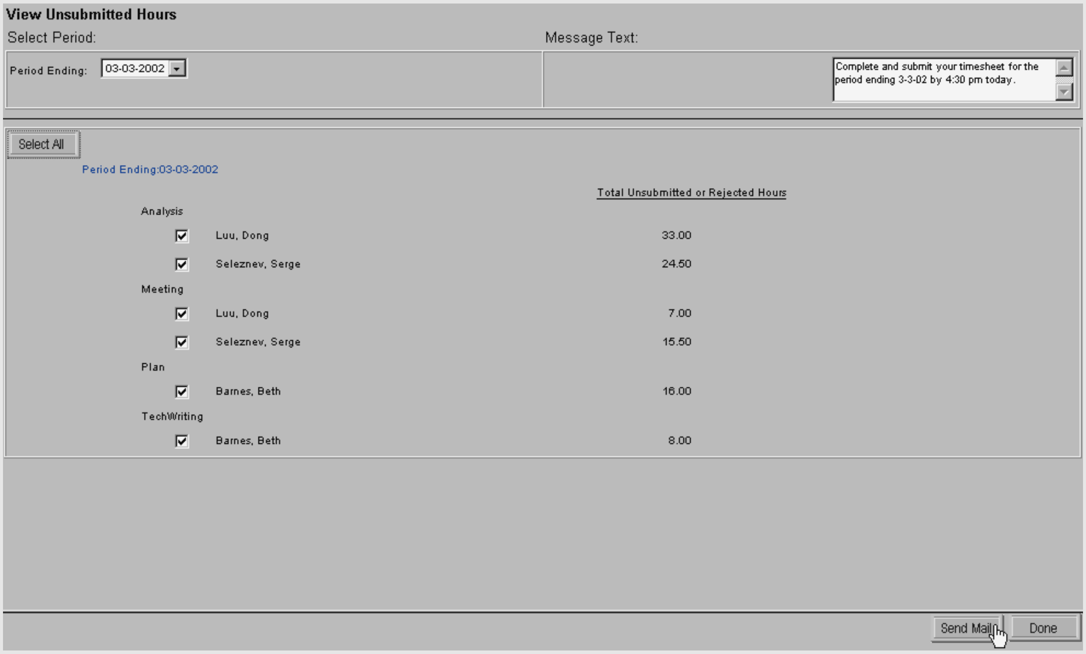


Figure 15.7

1. In your Employee Home Page, click on the **Approvals** button and open the Activity Approvals menu. Select View Unsubmitted Hours to open the View Unsubmitted Hours window.
2. Click on the Period Ending drop-down box in the upper left and select the desired period from the list.
3. Use the scroll bar to view activities and employees in the list, as needed.
4. To enter an optional message for selected employees, type your message in the Message Text box in the upper right of the window.
5. Click on the check box to the left of each employee you want to receive your message, or click on the **Select All** button in the upper left to select all employees in the window.
6. To send your email message to the selected employees, click on the **Send Mail** button in the lower right of the window.
7. To view another period, select the desired period from the Period Ending drop-down box.
8. To return to your Employee Home Page, click on the **Done** button in the lower right of the window.

C H A P T E R 16

Approving and Rejecting Expense Reports

Department owners with the permision to approve TimeWizard timesheets can also approve expense reports created with TimeWizard's expense system. The approval permission enables a department owner to view, approve, and reject submitted expense reports from all employees in the owned departments.

Approvals and rejections can be performed line by line or for entire expense reports.

Objectives

1. Approving and rejecting expense reports
2. Approving and rejecting individual expense entries

Objective 1: Approving and rejecting expense reports

You can approve or reject entire expense reports in the Expense Approval window or navigate to a detailed report view to approve or reject expense entries line by line. The window displays summary reports for one department at a time. You can also review reports in the detailed view and return to the main approval window to perform the approvals or rejections.

When an employee submits an expense report for approval, the report's approval status changes to "Pending," and the report becomes available for approval. If lower-level approvals are required in addition to your approval, then those approvals must be completed before you can access the report.

If you reject an entire report, its status changes to "Rejected," and the report becomes unlocked. The employee can then edit the report and resubmit it.

To approve or reject expense reports:

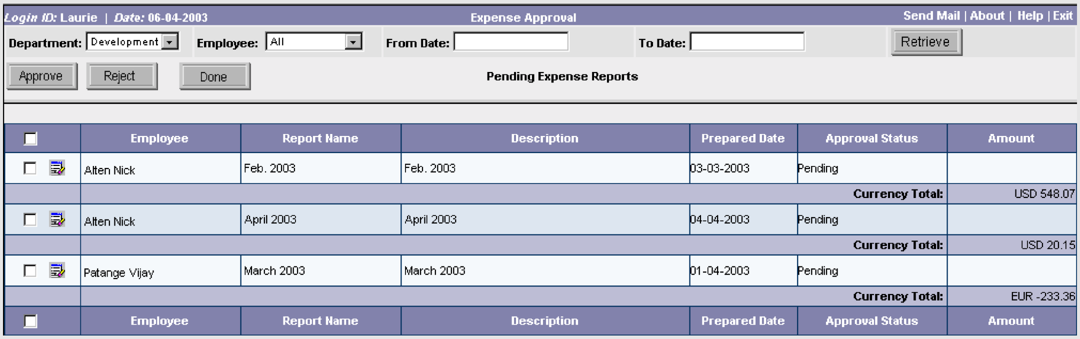


Figure 16.1

1. In your TimeWizard.*enterprise* Employee Home Page, open the Expenses menu from the main navigation bar and select Expense Approval to open the Expense Approval window (Figure 16.1).
2. The Department drop-down box in the upper left displays the department of the summary expense reports shown in the window. To view another department's reports, click the drop-down box and select the desired department. Then click **Retrieve** to display the reports.
3. To view the summary reports of only one employee in the selected department, click the Employee drop-down box next to the Department box and select the employee. Then click **Retrieve** to display the employee's reports.
4. To filter the reports by date range for the selected department, enter the first date of the range you want to view in the From Date box and the last date of the range in the To Date box in the upper right. Use the date format MM/DD/YYY. Click **Retrieve**.

   You can apply your date filter to all employees in the selected department by selecting "All" in the Employee drop-down box. Click **Retrieve** after making filtering changes.
5. Select the reports to approve by clicking the check box to the left of each desired report. You can select all displayed, pending reports by clicking the box at the top or bottom of the selection column.
6. Click **Approve** in the upper left to approve all selected reports. Approved reports disappear from the display.
7. Select the reports to reject by clicking their check boxes on the left, or click the box at the top or bottom of the selection column to select all displayed, pending reports.
8. Click **Reject** to reject all selected reports. Rejected reports disappear from the display.
9. Click **Done** to return to your Home Page.

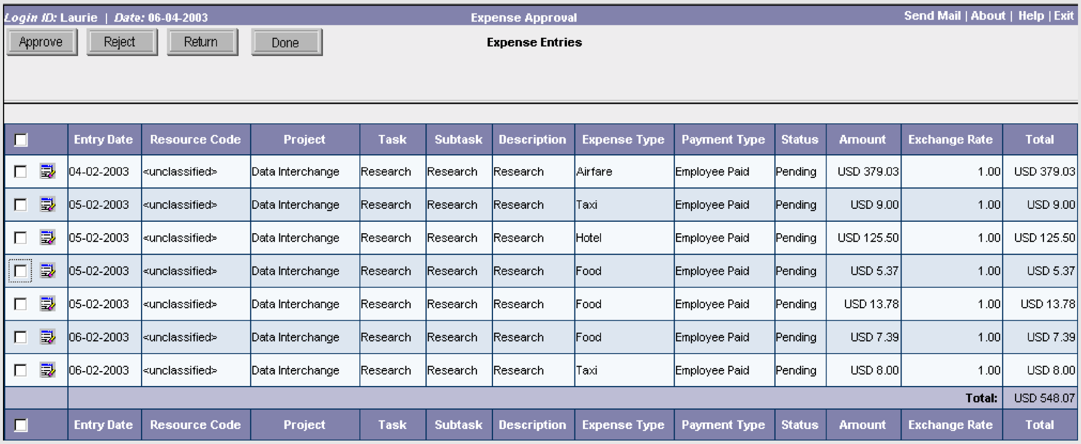
Objective 2: Approving and rejecting individual expense entries

From the main Expense Approval window, you can open an Expense Entries window to view a report's entries in detail. In the Expense Entries window, you can approve or reject the entire report, or you can approve or reject individual expense entries.

When one or more expense entries on a report has the status "Rejected," and no entries on the report have the status "Pending," the rejected entries are unlocked, and the employee can edit them. Employees cannot modify entries that have the status "Approved." After correcting the rejected entries, the employee must resubmit the expense report.

When an entry is approved or rejected, the selection box for the entry disappears from the display. When no expense entries on a report have the status "Pending," the report disappears from both approval windows.

To approve or reject an expense entry:



	Entry Date	Resource Code	Project	Task	Subtask	Description	Expense Type	Payment Type	Status	Amount	Exchange Rate	Total
	04-02-2003	<unclassified>	Data Interchange	Research	Research	Research	Airfare	Employee Paid	Pending	USD 379.03	1.00	USD 379.03
	05-02-2003	<unclassified>	Data Interchange	Research	Research	Research	Taxi	Employee Paid	Pending	USD 9.00	1.00	USD 9.00
	05-02-2003	<unclassified>	Data Interchange	Research	Research	Research	Hotel	Employee Paid	Pending	USD 125.50	1.00	USD 125.50
	05-02-2003	<unclassified>	Data Interchange	Research	Research	Research	Food	Employee Paid	Pending	USD 5.37	1.00	USD 5.37
	05-02-2003	<unclassified>	Data Interchange	Research	Research	Research	Food	Employee Paid	Pending	USD 13.78	1.00	USD 13.78
	06-02-2003	<unclassified>	Data Interchange	Research	Research	Research	Food	Employee Paid	Pending	USD 7.39	1.00	USD 7.39
	06-02-2003	<unclassified>	Data Interchange	Research	Research	Research	Taxi	Employee Paid	Pending	USD 8.00	1.00	USD 8.00
											Total:	USD 548.07
	Entry Date	Resource Code	Project	Task	Subtask	Description	Expense Type	Payment Type	Status	Amount	Exchange Rate	Total

Figure 16.2

1. From the main Expense Approval window, click the icon to the left of a report to view its expense entry or entries in detail.
2. In the Expense Entry window (Figure 16.2), select entries you want to approve, and click **Approve** in the upper left of the window. You can select all "Pending" entries by clicking the box at the top or bottom of the selection column.
3. Select entries you want to reject, and click **Reject** in the upper left. You can select all "Pending" entries by clicking the box at the top or bottom of the selection column.
4. To return to the main Expense Approval window, click **Return** at the top of the window, or, to go directly to your Employee Home Page, click **Done**.

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