Using Web Timesheets and Charge Slips

Overview

This is the one area of operation in which the repository operation in Notes and that from a Web browser are substantially different.

Note- The Timesheet Initiation setting on the participant profile must be "By User" for people who will use Web timesheets.

Creating Your Timesheet

From the Repository Center Home Page, click "My Timesheet".

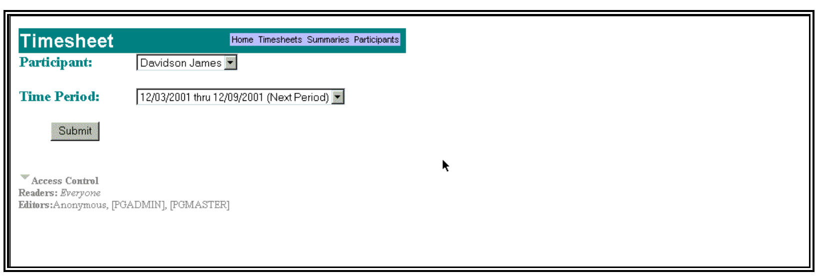
(Note, you may also start from the My Timesheet action on the Timesheets Navigator page or from the Timesheet action on your participant profile.)

If more than one participant shares your UserID, then a page will appear listing these candidates. Click the name of the participant whose timesheet your want. If there are no candidates, you will get a message to that effect.

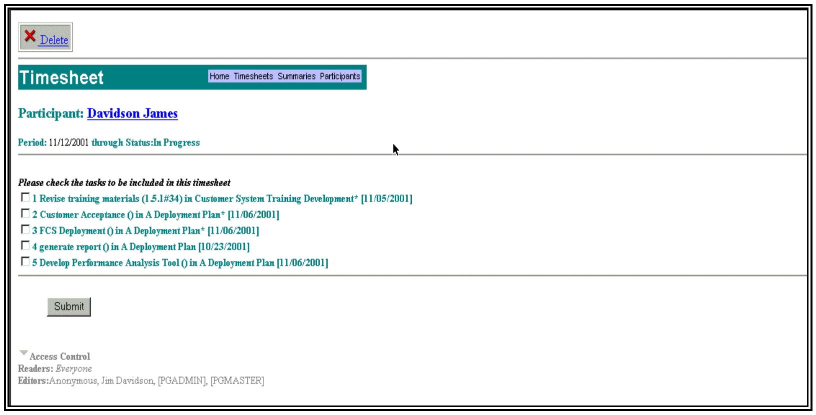
If you have an existing open, unposted timesheet, it will be displayed.

If your existing timesheet is in the Notes format, you will get a message telling you to use your Notes client to open it.

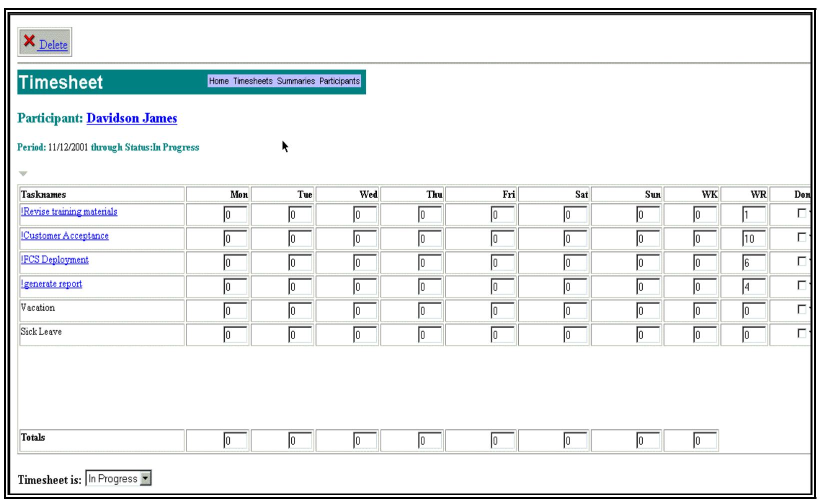
If your previous timesheet has been posted, the system will create a new timesheet for you.



The first display will show the participant name and allow you to select the time period. The earliest period you can select will be the one following the last posted timesheet. The last period you can select will be next week. Press Submit to continue.



The second display will show a checkbox list of all the available assignments that you could report against. Check all those that you want to report on for this week. Press Submit to continue.



The third display will show the timesheet grid. Each assignment and overhead category will be a row with entry cells for each day of the week, week total, work remaining, and done indicators. Below the task list will be the totals for the each day and the week . The tasknames are linked to open the assignment documents in separate browser windows.

Entering Work Hours

Position the cursor on the enter cell and type in the hours worked. You may use decimal fractions (e.g. 1.25). Results will be stored to the nearest minute when the timesheet is posted.

Adjusting Work Remaining

As you enter work hours and move the cursor to the next cell, the value shown in the column labeled WR will decrement. This is the Work Remaining for the assignment. This number will never be less than zero, but you must adjust it to a non-zero amount if you are expending more effort than planned, but have not yet completed work.

The Work Remaining field allows you to adjust the estimated effort for in-progress assignments. You should take care to make only thoughtful changes here because these will be posted to the project plan, project dashboard, work forecasts, etc. and may cause concern. When in doubt, simply change the work remaining to 1 hour, and consult with the project leader about the problems with the work.

You will not be allowed to save the timesheet if you have an assignment with zero work remaining that is not also marked as completed (unless the assignment was originally planned with zero work).

Marking Assignments Complete

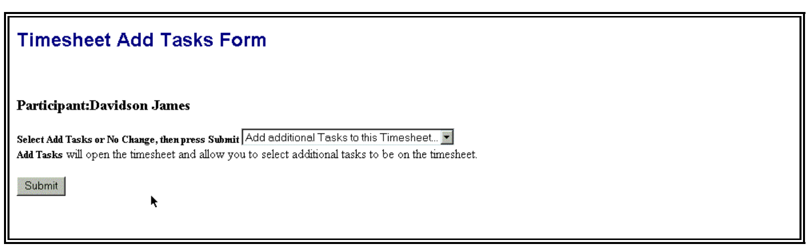
If you have completed work on the assignment during this week, enter the actual work hours on the proper days, set the **WR** value for this assignment to 0 (if it is not already so set) and put a checkmark in the **Done** column.

Adding Additional Assignments

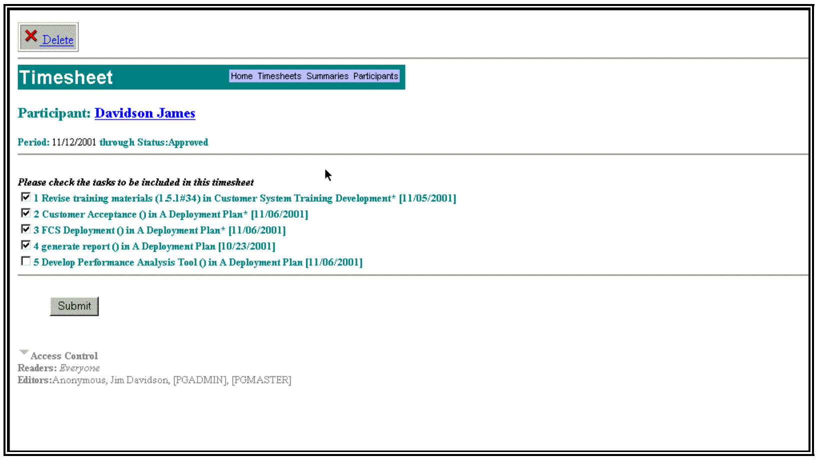
Once an initial timesheet has been created and saved (but not formally submitted for approval) you can modify the list of tasks. If you are currently editing the document, set the selector to "In Progress", press Submit, then press "Open this timesheet document" on the response page.

A button labeled "Add Tasks" will appear at the top of the timesheet. Click this button.

The system will display the Timesheet Add Tasks Form, which is a simple transaction page. Press Submit to Continue.



This will display the assignment selection page. The existing tasks will be prechecked.



Select your additional tasks and press submit to reopen the timesheet with the additional tasks.

Creating New Assignments for this Timesheet

If you need to report work on a task that you are not currently scheduled to do, then you must first create an assignment for yourself and then you can reload or refresh the timesheet to include it.

To create a new assignment, use the "create new assignment" action on the Project Assignments Navigator. To add yourself as an additional resource on an existing task, see the instructions in the Assignments chapter for using the "New Coworker" function.

Saving for tomorrow

Set the timesheet status to "InProgress" and press Submit. A response page will appear offering various options.

This will store the timesheet and allow you to reopen it tomorrow using the "My Timesheet" action.

Submitting

To submit the completed timesheet for set the timesheet status to "Completed" and press the Submit button.

Data Validation

At this point the timesheet will be checked for two things.

First that all assignments marked complete have zero work remaining and that unfinished assignments have non-zero work remaining.

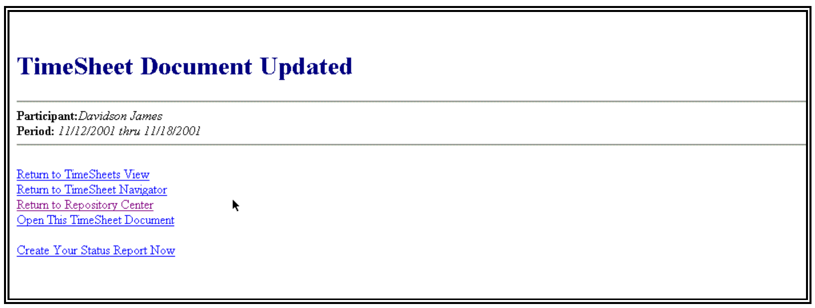
If such an assignment is found, a message will be displayed. You must correct the data and press submit again.

Second that the total timesheet hours fit into the limits that were preset for all users by the system administrator.

There may be no limits, in which case no checking is done, there may be "warning" limits in which case you will get a dialog box with the option to continue, or there may be hard limits in which case you will be told that the timesheet does not have the correct total number of work hours. In the latter case, you must change the data and resubmit.

The system will check for inconsistent data and may pop up a message if, for example, you mark a task as done, but leave work remaining hours more than zero or if you set work remaining to zero, but do not also mark the task as done. The system does not limit the number of hours you can report for a single day or for the week (since some project participants may actually be teams of people reporting only as a group).

When the data passes this first level inspection, the information will be uploaded to the server and a response page will appear offering options to reopen the timesheet, Return to Repository Center, or to create a participant status report.



Fixing errors

It happens. Just as the timesheet disappears from the screen you see your mistakes.

Fortunately the system has a built in delay from the time you submit the timesheet to the time it is posted. This delay usually extends until the evening, but can be configured for your site to be a shorter period, so the sooner you fix the problem the better.

To correct your submitted, but unposted timesheet, you *Reject* it.

1. Reopen your timesheet using the My Timesheet action or the open timesheet document link on the timesheet updated response page. You will see a "Reject" button.
2. Click the Reject button.
3. Reopen the timesheet to make your changes and resubmit.

Timesheet Approval and Posting

Depending upon the settings in the Timesheet Profile section of the Participant Profile, the timesheet may require third party approval or may be self approved. Note that the information in the Participant Timesheet profile is stored into the timesheet at the time the timesheet is created and cannot be changed for an existing timesheet.

If approval is not required, or if the person creating the timesheet is in the list of Approvers for that participant, then the timesheet is automatically marked as "Approved" when it is submitted with "Completed" status.

If the person creating the timesheet is not in the list of Approvers as specified in the Participant Profile, but approval is required, then the timesheet will be given the status of "Submitted". In addition, an email will be sent to the first person on the Approvers list that links to the timesheet. Note, the timesheet itself is not sent to the approver, only a message with a URL or Notes Doclink to the timesheet.

Approving a Timesheet

When a person (who is a member of the list of approvers) displays the timesheet, the Approve button will appear.

Pressing the Approve button displays a transaction form that lets you approve the timesheet or leave it unchanged.

Select the desired action and press Submit. The timesheet will be redisplayed with the approved status.

Rejecting a Timesheet

A timesheet can be rejected by a member of the set of approvers or by the author of that timesheet. When rejected, it can be edited by the author to make changes.

To reject at timesheet, you press the Reject Button and use the transaction form which will be displayed.

This function can be used to correct a timesheet that has been submitted for approval but which is later noticed to have a mistake. Note, you cannot reject a posted timesheet, but there may be a delay between approval and posting depending upon how the posting agents are scheduled in your repository.

Posting Timesheets

Posting is the final part of the time recording process. Posting is not done until the timesheet has been approved. Once posted, the time entries cannot be changed by the user.

During posting, the time reported against individual assignments is recorded on the assignment documents in the progress history field. Time that has been posted will be synchronized back to the project management system and displayed in the Time Summary views.

All timesheets are posted by a scheduled background agent. Depending upon the scheduling setup by your site administrator, posting may very soon after approval or not until the evening.

Single Timesheet per Participant Rule

A participant may have only one open (created but not posted) timesheet at any given time. If the current timesheet has not yet been approved, that participant will not be able to create another. This restriction is necessary because the timesheet is used to report both actual hours and project status changes. If a second timesheet were created before the first was posted, it would be initialized with status information that may have already been changed in the first timesheet. For example, tasks marked completed on timesheet A would still have work remaining on timesheet B.

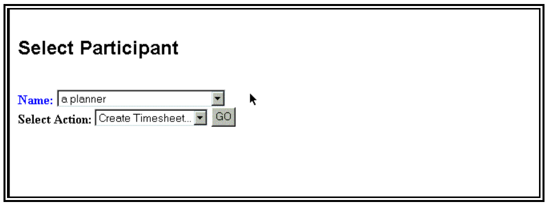
Why the assignment is not on the timesheet?

All of your assignments will be shown on your timesheet unless:

- The assignment is marked done.
- The assignment is part of a project that is not in an approved state.
- The assignment itself is marked to be excluded from timesheets.
- The assignment start date is after the lookforward window.
- The assignment is part of a project that is part of a program who program name begins with a [character. This is a called a hidden program and will prevent assignments from appearing in timesheets.

Creating a Timesheet For Another

Click on the navigator item "create a timesheet for another". The system will display a page showing the names of participants in the database.



Select the participant and press OK.

The system will reopen any current, unfinished timesheet (if there is one) or immediately create a new timesheet for this person.

If this person already has a posted timesheet for the current week, a dialog box will appear to offer you the opportunity to create a new timesheet for next week.

If you are not authorized to create a timesheet for this participant, the timesheet will open with an error message displayed in Red. Your only action is to quit.

Actions Available on Web Timesheets

Add Tasks

This appears when an InProgress timesheet is displayed. Clicking it will open a transaction form which will allow you to reselect the tasks shown on the timesheet.

Delete

This will open a transaction form allowing you to delete the timesheet if you have the right to modify it.

Approve

This will appear if the timesheet has been submitted but not yet approved. This will open a transaction form allowing you to approve the timesheet.

Reject

This will appear if the timesheet is not yet posted. It will allow you to reject the timesheet so as to allow revision and resubmission.

Unlock

This will appear on posted timesheets if you are a person with the role of [PGADMIN]. It will allow you to unlock the timesheet to allow yourself or the orginal author to make corrections.

Correct

This will appear if the timesheet is unlocked. It will allow you to add, remove or modify timesheet information and immediately update the related assignment documents.

Timesheet Links

The timesheet banner contains links to HOME (Repository Center), TIMESHEETS (Navigator), SUMMARIES (Workload Navigator), and PARTICIPANTS (Navigator).

The participant name is linked to the participant profile document.

The task names are linked to the assignment documents (opening new browser windows).

Possible Problems when using Web Timesheets

Security Errors

Opening and saving a Web timesheet involves the execution of agents on the server. If the server agents are not properly enabled, then errors will result. If you see messages indicating these problems, contact your system administrator.

Problems: Row and Column totals do not change.

This problem is caused when JavaScript execution has been disabled by the options settings in you browser. Find the option setting and enable it, close all browser windows and reopen the timesheet form.

Problems: Compatibility Message appears frequently

The timesheet form is intended to be used with a JavaScript capable browser such as Microsoft Internet Explorer 3 or Netscape Navigator 2.01 or 3.0 or later. This message indicates that the browser has told the server that it does not have this capability. This means that row and column totals, automatic work remaining adjustments, and data validation will not work. Install a newer browser.

Time Zone Issues

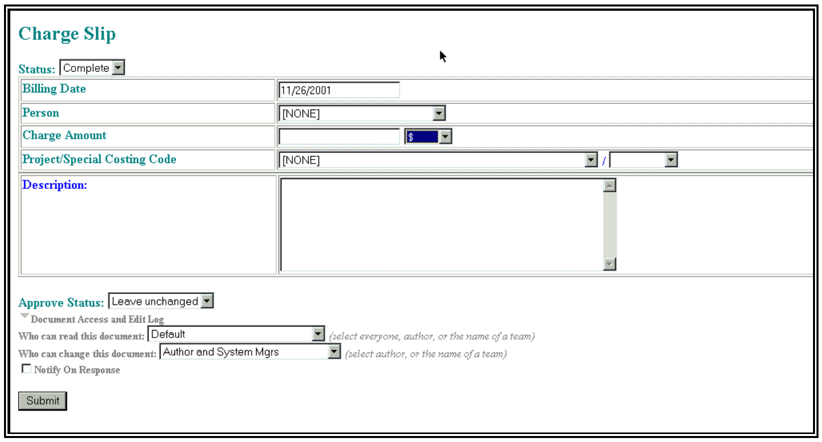
All timesheet processing assumes the *time zone of the server*. Thus, if you are operating many zones different that your server, your Monday may be it's Sunday or vice versa.

Charge Slips

Charge Slips provide a way for project participants to record expenses such as equipment purchases against a project. The exact way in which these should be used in your organization may vary from that shown here, so you should consult with your system administrator before using this feature. These charges are sent to the Costing Center application for processing. They have no direct effect in Repository Center.

Creating a Charge Slip with a Web Browser

Click on the navigator item, "create a new charge slip" to display the charge slip form. Fill in the appropriate fields, close and save.



Charge Slip Information

Billing Date

This is set to the date the charge slip is created, but can be adjusted.

Person

This a list of participants for selection. It is not necessary to select a person for a charge, but it would be customary to do so and your finance department or project manager may not accept charges without a designated person.

Charge Amount

This is entered in two fields. The first is the amount of the charge, the second is the units of the charge. I the shipping design these will show $ for money and "Hours" for labor. These entries can be customized for your site, so they may appear different.

Note: Labor charges made against a project on a charge slip will not show up anywhere in Repository Center. They will not show on the project dashboard as actual work. They will not show in the Time Summary views. They will not be transferred back to the project management applications used for scheduling. You should report task effort on timesheets, not on charge slips. Charge slips should be used only for specific, pre-approved situations, such as for hourly consultants who are not part of the scheduled project effort.

Project/Special Billing Code

The first item has list of projects provided. You should select the correct project for this charge. Note: All project charges must be approved by the manager of that project before they are accepted for cost processing.

The second field, the special billing code, may be required in your organization to properly allocate the charge. The set of possible codes has been preconfigured for your site by your system administrator.

Note: In some sites it may be acceptable to charge costs directly against predefined codes established by you system administrator. In this case the project field is set to [None] and the overhead category name is selected in the second field.

Approving Charge Slips

Charge slips may be approved by anyone with the [PGADMIN] role or by the manager of the project to which the charge is applied. If you are authorized to approve a chargeslip, the "Approve" button will appear a the top of the form whenever it is edited. Once approved, a charge slip cannot be changed.

Approved charge slips will be transferred to the Costing Center application by the Costing Link agent. This is normally scheduled for nightly or weekly operation.

Recent Charges View

The "Recent Charges" view tabulates charge slips previously submitted.

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