



# UKG Pro™ Time and Attendance

Daily Timesheet User Guide



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## About this guide

This guide provides information for system administrators on how to set up, secure, and configure the Daily Timesheet for Time and Attendance. The guide also provides information for supervisors and employees on how to track time and authorize timesheets.

## Intended audience

This document is intended for employees, managers, system administrators, and support staff.

## Chapter 1: Overview

The Daily Timesheet is used to track exceptions to schedules, such as an employee taking a sick day or working late. The Daily Timesheet is also used to charge the hours that are worked against metrics such as specific jobs, projects, or departments.

Before an employee can use the Daily Timesheet, a system administrator must do these tasks:

- Set up and assign a shift pattern, which creates a repeating schedule of shifts and days off.
- Assign a default labor allocation, which divides the employee's time between jobs, projects, and departments.

Supervisors can then choose to create the employee's schedule from these default records, copy a schedule from a previous time period, or reschedule specific days.

Employees use the timesheet to record sick days, lateness, or any exception to their planned schedule. They can record their time worked against different departments, jobs, or projects if it does not match their default labor allocation. They can also record overtime through the Daily Timesheet.

After entering any overrides, users submit their timesheets for approval. Supervisors can use different summaries to view timesheets and approve them all at once or individually.



## Chapter 2: Initial setup

As a system administrator, you must perform some setup tasks before employees can use the Daily Timesheet. Employees require a schedule of start and end times and a planned work assignment, called a default labor allocation.

Employee schedules are automatically created from their shift pattern, an ordered list of shifts that employees are scheduled to work. Shift patterns include all the shifts and days off that consist of a complete, repeating cycle.

Default labor allocations specify what tasks employees work on, and for how long, during the week. The amount of time employees work against specific metrics such as jobs, projects, and departments is tracked.

You must perform these tasks before employees can use the Daily Timesheet:

1. Create schedules.

See “Creating employee schedules” in the *Implementation and Administration Guide*.

2. Assign schedules to employees.

See “Assigning schedules” in the *Implementation and Administration Guide*.

3. Set default labor allocations for employees.

See “Creating employee labor allocation overrides” in the *Implementation and Administration Guide*.

## Chapter 3: Security

As a system administrator, you can set the timesheet security. Timesheet security controls the tasks users can perform on the timesheet and the related pages, the information they can view, and the activities they can perform.

Setting the timesheet security involves three groups of tasks:

- Setting user permissions for timesheet elements
- Setting user permissions for overrides
- Setting user permissions for timesheet activities

### Setting user permissions for timesheet elements

By configuring security groups and permissions, you control the elements, such as buttons and links, that employees can use. Users are assigned to security groups, which are assigned permissions for the timesheet elements.

All the users within a security group have the same permissions. They can see the same information on the timesheet and can manipulate or interact with the same elements.

For example, the EMPLOYEE security group's permissions allow users to view the Authorized section of the timesheet, but prevent them from performing authorization tasks. If you change a user from the EMPLOYEE security group to the SUPERVISORS group, the user is granted the permissions of the SUPERVISORS group.

Setting user permissions for timesheet elements involves these tasks:

- Assigning users to security groups. See “Assigning users to security groups” in the *Implementation and Administration Guide*.
- [Assigning permissions for timesheet elements](#) on page 10.

### Assigning permissions for timesheet elements

For every element on the timesheet, three types of permissions can be assigned:

- **ACT:** Users can manipulate the element. Depending on the element, this can mean clicking (for a button, link, or drop-down), typing (for text boxes), or selecting/deselecting (for check boxes).
- **VIEW:** Users can view the element.
- **DENY:** Users cannot access the element. It is hidden.

**To set the authorization permissions of a security group:**

1. Select **Timesheet**.
2. Click the **Turn ON config mode** icon.

3. Select an employee's timesheet.
4. Click the security (key) icon next to the element of the timesheet.
5. Specify this information:
  - Security Group**  
Select a security group.
  - Permission Flag**  
Select an authorization permission.
6. Click **Save** and close the window.
7. Click the **Turn OFF config mode** icon.

### Assigning permissions for timesheet comments

Users can enter comments on the timesheets with either the field in the Comments column or the Comments pop-up. Assigning user permissions for timesheet comments is slightly different than other timesheet elements. Users can edit timesheet comments if these conditions are met:

- Users have ACT or VIEW permissions on the **WRKS\_COMMENTS** field.
- One of these conditions is true:
  - Users have ACT or VIEW permissions on the **TS\_MANAGE\_COMMENTS** field.
  - The **WRKS\_COMMENTS** field is not configured as a **HiddenUI** field type.

#### To configure the field type of the **WRKS\_COMMENTS** field:

1. Select **Timesheet**.
2. Click the **Turn ON config mode** icon.
3. Select an employee's timesheet.
4. Click the localization (orange diamond) icon next to the **Comments** field on the right side of the timesheet.

The **Field Localization** window is displayed for the **WRKS\_COMMENTS** field.
5. Select a field type from the **Field UI** drop-down list.
6. Click **Save** and close the window.
7. Click the **Turn OFF config mode** icon.

### Setting user permissions for overrides

Assigning override permissions controls whether users can view, edit, or delete overrides on timesheets. Override permissions work similar to timesheet element permissions: users are

assigned to security groups and security groups are granted override permissions. There are three types of override permissions:

- **EDIT:** Users can view, edit, or delete the override on the timesheet.
- **VIEW:** Users can view the override on the timesheet, but cannot edit or delete it.
- **NONE:** Users cannot view the override on a timesheet. The override entry is hidden.

Setting user permissions for overrides involves these tasks:

- Assigning users to security groups
- See “Assigning users to security groups” in the *Implementation and Administration Guide*.
- Assigning override permissions
- See “Granting or revoking group permissions for override types” in the *Implementation and Administration Guide*.

## Setting permissions for timesheet activities

You can set the activities that users can perform on the timesheet. There are several activities that users require permission to perform:

- Approving time
- Authorizing their own timesheets
- Viewing timesheets other than their own

### Approving time

Supervisors require permissions to approve the time of their employees. Supervisor roles determine the users who are considered supervisors and teams determine the employees for whom a supervisor can approve time.

Setting permissions for approving time involves these tasks:

- Creating supervisor roles.  
See “Creating employee roles” in the *Implementation and Administration Guide*.
- Assigning users as supervisors to teams.  
See “Assigning user teams and roles” in the *Implementation and Administration Guide*.
- Assigning employees to teams.  
See “Assigning employees to teams” in the *Implementation and Administration Guide*.

## Work summary authorization

Timesheets are authorized at the work summary (daily) level. Each day in the system is always either in a state of authorized or unauthorized. In the database, the authorization state is maintained using the `WRKS_AUTHORIZED` field on the `WORK_SUMMARY` table.

By default, all records in the system are authorized. The system automatically unauthorizes records using pay rules (Unauthorize Rule) and the registry (`UNAUTHORIZE_WRKS_IN_ERROR`). Use the Unauthorize Rule to unauthorize timesheets when certain conditions are met, such as late arrivals, overtime, and absences. You can also configure the rule to unauthorize all records and require managers to authorize all timesheets for employees under their supervision.

Users with sufficient permissions can authorize or unauthorize a work summary record through a work summary override. A user can switch the authorization state of the work summary to indicate whether the day is authorized or unauthorized.

## Work detail approval

To control authorization of time at a more granular level, you can enable work detail approval. Work detail approval supports the case where an employee works at two separate work locations and the manager of each location is responsible for approving only the time worked at their particular location. Consider this example:

- Employee Esther is a permanent member of the IT team. Occasionally, Esther also performs work for the Support team.
- Nicola, as manager of the IT team, is responsible for approving any time Esther charges against the IT team.
- Carol, as manager of the Support team, is responsible for approving any time worked against the Support team.
- Neither Nicola nor Carol is permitted to approve time that is charged to the other's team.

A day is authorized only when all work details that consist of the day are in an authorized state. If one or more of the details are unauthorized, the day must be unauthorized too.

#### **Example: Esther works 4 hours on IT team and 4 hours on Support team**

Using the example above, assume Esther records 4 hours against the IT team and 4 hours against the Support team. When Nicola tries to authorize the day:

- The details that are associated with the IT team are authorized.
- The details that are associated with the Support team remain unauthorized as Nicola lacks permission to approve that time.
- The overall authorization state of the day remains unauthorized.

If Carol then tries to authorize the day, the details that are associated with the Support team are authorized. As all work details in the day are now in an authorized state, the entire day is authorized.

When work detail approval is enabled, users with sufficient permissions can also set the authorization status of individual work details. In this case, the system records the authorization status of each detail on a day and sets the day's overall authorization status accordingly. Using the example above, Nicola can authorize the individual work details of the IT team. Carol can authorize the individual work details of the Support team. When Nicola and Carol have both authorized the individual work details for their respective teams, the entire day is authorized.

#### **Example: Esther works all day on IT team**

In this example, assume Esther records all her work time against the IT team. When Nicola tries to authorize the day, all the details on the day are authorized, which in turn authorizes the day itself.

### **Enabling work detail approval**

You must enable work detail approval so that the supervisors with security permissions can approve or authorize time. A work detail is an itemized time segment, with a start and end time, for an employee that occurs in a day.

To set up work detail approval, you must enable it first.

To enable work detail approval, set the `USE_WORK_DETAIL_APPROVAL` registry parameter to **True**.

After enabling work detail approval, you must determine the teams that supervisors can view and approve work details. This is also controlled by a registry parameter.

To set the approval settings of work details, configure the `TS_DETAIL_APPROVAL_MODE` registry parameter.

See the *Registry Parameter Reference Guide*.

### **Allowing users to authorize their own timesheets**

By default, users cannot authorize their own timesheets. You can remove this restriction.

To allow users to authorize their own timesheets, set the USER\_CAN\_AUTHORIZE\_SELF registry parameter to **True**.

See the *Registry Parameter Reference Guide*.

## Chapter 4: Configuration

As a system administrator, you can configure several aspects of the Daily Timesheet, such as:

- Set the maximum number of records that are displayed per page of the timesheet
- Set the time format
- Set the default timesheet of employees
- Add override types
- Set irregular time codes
- Set the week's start day
- Configure mass edits
- Create clock presets
- Define a default clock sequence
- Disable clock preview on hover
- Hide non-ON/OFF clocks by default
- Create labor shortcuts
- Set up DBLookup filters for inline edits of detail/premium fields
- Configure the fields that are displayed in the employee information card

### Setting the maximum records displayed per page

To set the maximum number of records that are displayed on a single page of the Daily Timesheet, configure the `TS_MAX_PER_PAGE` registry parameter.

See the *Registry Parameter Reference Guide*.

### Setting the time format

Times on the Daily Timesheet can be displayed in decimal format or HH:MM format. To set the time format, configure the `TS_CODE_SUMMARY_NUMBER_FORMAT` registry parameter.

See the *Registry Parameter Reference Guide*.

### Setting the default timesheet to Daily

You can set employees to use the Daily Timesheet by default. Using search criteria, you can assign multiple employees to the Daily Timesheet at once.

1. Select **Maintenance > Employees > Employee Default Timesheet**.
2. Specify this information:



### **Employees**

Select the employees whose default timesheets you want to set.

### **Teams**

Select the teams whose default timesheets you want to set.

### **Include Sub Teams**

Select the check box to set the default timesheets of the sub teams of any teams that are selected.

### **Calc Groups**

Select calculation groups to set the default timesheets of employees in the calculation group.

### **Pay Groups**

Select pay groups to set the default timesheets of employees in the pay group.

### **Effective Date**

Specify today's date in MM/DD/YYYY format.

### **Timesheet**

Select **Daily**.

3. Click **Set**. The employee's default timesheet becomes effective immediately and does not depend on the **Effective Date** value.

## **Bypassing the selection parameters for the default approval worksheet**

You can configure the application to bypass the initial selection parameters page that is displayed after supervisors click the **My Approval** link for the first time.

When a supervisor clicks the **My Approval** link, the selection parameters page of their default approval worksheet is displayed, pre-populated with their selections. You can bypass this page so their default approval worksheet is displayed immediately.

Users can select their own default approval worksheets.

See [Setting the default approval worksheet](#) on page 42.

To bypass the selection parameters page, set the MY\_APPROVAL\_BYPASS\_SELECTION registry parameter to **True**.

See the *Registry Parameter Reference Guide*.

## **Adding override types to the timesheet**

Several types of overrides can be used with the timesheets. By default, not all override types are available to the users. You can configure the override types that are available on the timesheet.

1. Select **Maintenance > Payroll Settings > Advanced Payroll Settings > Override Types**.
2. Click **Edit** next to an override name to add it to the timesheet.
3. Select the **Show on Timesheet** check box to add the override type to the override pop-up window on the Daily Timesheet.

**Note:**

Not all override types are eligible for use on the Daily Timesheet.

4. Click **Save**.

## Configuring how locked days affect overrides

You can set how locked days affect overrides. Locked days include days that are locked manually from the timesheet and days that are locked by the Hands Off and Supervisor dates.

Overrides that span locked days can result in two outcomes:

- An override error is generated for the entire date range.
- Overrides are applied to the "open" days in the date range and only generate errors for the locked days. These overrides can be edited or deleted before submitting the timesheet.

To set how locked days affect overrides, configure the `CREATE_ONE_DAY_OVERRIDES` registry parameter. Specify **True** to generate errors for the entire date range if at least one of the days is locked. Specify **False** to generate errors only for the days in the date range that are locked.

See the *Registry Parameter Reference Guide*.

## Setting irregular time codes

The time codes that are defined as irregular are highlighted if they are used as the first, last, or full day time codes. You can set the time codes that are considered irregular and should not ordinarily be used as the first, last, or full day time codes. For example, an employee uses the BRK time code as their first time code; this is probably irregular and should be highlighted on the timesheet to notify the supervisor.

1. Select **Maintenance > Payroll Settings > Time Codes**.
2. Click **Edit** next to a time code.
3. Select the **Irregular Code** check box.
4. Click **Save**.

## Setting the week's start day

You can set the day that is considered the start of the week and is displayed first on the timesheets.

To set the week's start day, configure the `DAY_WEEK_STARTS` registry parameter.

See the *Registry Parameter Reference Guide*.

## Adding custom filters to the Authorization search criteria

Default search criteria is displayed in the **Authorization** drop-down list on the **Timesheet Selection** page, which filter the selected timesheets based on their authorization status. This lets users search for timesheets with custom criteria. If you have SQL knowledge, you can add custom filters to this list.

1. Select **Maintenance > Payroll Settings > Advanced Payroll Settings > Timesheet Filters**.
2. Click **Create New Entry**.
3. Specify this information:

### **Name**

Specify the name of the filter. This is the label that is displayed in the **Authorization** drop-down list on the **Timesheet Selection** page.

### **Description**

Specify a brief description of the search criteria.

### **SQL**

Specify the SQL code for this filter. The code is appended with an AND on the end of the timesheet SQL Select statement that retrieves the records for the timesheet.

### **Use on Daily**

Select the check box to allow the Daily Timesheet to use the search criteria.

4. Click **Save**.

## Configuring mass edits

You can configure mass edits by setting these limits:

- Maximum number of days that are affected in one mass edit
- Maximum number of edits that are performed in one mass edit
- Maximum number of employees who are affected in one mass edit

To set the maximum number of days per mass edit transaction, configure the `MAX_NUM_DATES` registry parameter.

To set the maximum number of edits per mass edit transaction, configure the `MAX_NUM_EDITS` registry parameter.

To set the maximum number of employees who are affected per mass edit transaction, configure the `MAX_NUM_EMPLOYEES` registry parameter.

See the *Registry Parameter Reference Guide*.

## Creating clock presets

To simplify the recording of non-ON/OFF clocks on the timesheet, you can define additional clock presets. Clock presets combine a clock type and optional clock data that is automatically included on the timesheet. For example, you can create a clock preset named START BREAK with clock data TCODE=BRK. When a user selects the START BREAK clock preset on the timesheet, the **Data** field is automatically populated with TCODE=BRK.

### Note:

Altering the data that is associated with a preset does not change that data on the timesheet for any existing clocks.

1. Select **Maintenance > Reader Setup > Clock Preset**.
2. Click **Create New Entry**.
3. Specify this information:

#### **Name**

Specify the name of the clock preset.

#### **Description**

Optionally, specify a description for the clock preset.

#### **Clock Type**

Select a clock type for the preset.

#### **Time Code**

Optionally, select a time code for the preset. This time code is appended to the clock data string on the timesheet. For example, if you select **BRK**, TCODE=BRK is appended to the clock data string.

#### **Job**

Optionally, select a job for the preset. This job is appended to the clock data string on the timesheet. For example, if you select **TECH**, JOB=TECH is appended to the clock data string.

#### **Department**

Optionally, select a department for the preset. This department is appended to the clock data string on the timesheet. For example, if you select **DEPT A**, DPT=DEPT A is appended to the clock data string.

#### **Project**

Optionally, select a project for the preset. This project is appended to the clock data string on the timesheet. For example, if you select **PROJECT A**, PRJ=PROJECT A is appended to the clock data string.

#### **Docket**

Optionally, select a docket for the preset. This docket is appended to the clock data string on the timesheet. For example, if you select **0**, DKT=0 is appended to the clock data string.

### **Clock Data**

Optionally, specify additional clock data for the preset. This data is appended to the clock data string on the timesheet. For example, if you select **BRK** from the **Time Code** field and specify **SAMPLE=TEST** in this field, the clock data string contains **TCODE=BRK&SAMPLE=TEST**.

### **Widget Order**

Optionally, to add the clock preset as a button on the mobility Clock widget, specify its relative position in this field.

### **Color**

Optionally, specify the color that is used to render the labor metric clock matching the preset on the timesheet. For the changes in this field to take effect, clear your browser cache after saving the clock preset. If you do not specify a value in this field, labor metric clocks are rendered in gray.

This value is also used to render the corresponding clock button on the mobility Clock widget, if configured using the **Widget Order** field.

#### **Note:**

This field does not apply to ON clocks or OFF clocks on the timesheet. If you change the color of the ON or OFF preset, only the corresponding button on the mobility Clock widget is updated. On the timesheet, ON clocks (including labor metric clocks treated as ON clocks) are always rendered in green and OFF clocks are always rendered in red.

#### **Note:**

Presets must be a unique combination of clock type and clock data. You cannot create a preset that contains the same clock type and data string as an existing preset. When validating the string values of clock data, a match occurs if both strings contain the same value (an exact match is not required). For example, **TCODE=BRK** matches **TCODE=BRK&SAMPLE=TEST** because both strings contain **TCODE=BRK**.

#### 4. Click **Save**.

On the timesheet, any existing clocks that match the preset are displayed using the preset name as the type, for example, **START BREAK**. To match the preset, a clock must have the same clock type and its clock data string must include the data that is defined in the preset. An exact match of the clock data string is not required, as above.

If the clock data string does not include the data that is defined in the preset, the clock type is displayed, for example, **TIMECODE**.

## **Controlling the list of clock presets that are available for selection**

By default, all defined clock presets are displayed on the Daily Timesheet. If some presets do not apply to your organization (for example, **TSDOCK**), you can exclude them from being displayed.

1. Select **Timesheet**.
2. Click the **Turn ON config mode** icon.

3. Select any employee's timesheet using the **Timesheet Selection** page, and click **Load**.
4. In the Clocks column, above the plus icon, click the localization (orange diamond) icon for **CLK\_PRESET**.

The **Field Localization** window is displayed for the **CLK\_PRESET** field.

5. Edit the query that is used to return the list of presets.

For example, this query excludes the TSDOCK and DIRECTIONLESS clock presets from being displayed:

```
source="SELECT CLKPRESET_ID, CLKPRESET_LOC_NAME, CLKPRESET_LOC_DESC
FROM VL_CLOCK_PRESET
WHERE CLKPRESET_LOC_NAME NOT IN ('TSDOCK', 'DIRECTIONLESS')"
```

6. Click **Save** and close the window.
7. Click the **Turn OFF config mode** icon.

## Adding Labor Metric Selection Lists to the Add New Clock Widget

To simplify labor metric clock transfers, you can add labor metric selection lists to the Add New Clock widget. In this example, Department and Job lists have been added to the widget:

Registry setting	Behavior	Valid values
/system/UTA/dailytimesheet/clockdata/ CLOCK_DATA_VISIBLE	Show or hide the Data field in the Add New Clock widget.	TRUE or FALSE

Registry setting	Behavior	Valid values
/system/UTA/dailytimesheet/clockdata/ CLOCK_FIELD_SELECTORS	Comma-delimited list of the labor metric selection lists to add to the widget  For example: TIME_CODE, DEPARTMENT	DEPARTMENT, DOCKET, JOB, PROJECT, TIME_CODE
/system/UTA/dailytimesheet/clockdata/ CLOCK_STRING_CALLOUT_CLASS	Required. Modifies the Add New Clock widget to recognize the LM selection lists.	com.uta.util.callouts. UTAClockStringTimesheetUICallout
/system/UTA/dailytimesheet/clockdata/ FILTER_DEPARTMENTS	Defines which departments to display in the selection list.	A comma-separated list of the DEPT_NAME values to include.  To include all departments, leave the value blank.  By default, the list displays the raw DEPT_NAME values. You can specify an alternate display name using a tilde (~). For example: <code>BRK~Break Out,WRK~Break In</code>
/system/UTA/dailytimesheet/clockdata/ FILTER_DOCKETS	Defines which dockets to display in the selection list.	A comma-separated list of the values to include. Leave blank to include all values. To use an alternate display name, specify it after a tilde (~).
/system/UTA/dailytimesheet/clockdata/ FILTER_JOBS	Defines which jobs to display in the selection list.	A comma-separated list of the values to include. Leave blank to include all values. To use an alternate display name, specify it after a tilde (~).
/system/UTA/dailytimesheet/clockdata/ FILTER_PROJECTS	Defines which projects to display in the selection list.	A comma-separated list of the values to include. Leave blank to include all values. To use an alternate display name, specify it after a tilde (~).
/system/UTA/dailytimesheet/clockdata/ FILTER_TIME_CODES	Defines which time codes to display in the selection list.	A comma-separated list of the values to include. Leave blank to include all values. To use an alternate display name, specify it after a tilde (~).

## Defining a default clock sequence

When a user enters a sequence of clocks, the default clock type alternates between ON and OFF. This accommodates an employee who clocks on at the start of the day and clocks off at the start of lunch. If you use a clocking sequence other than ON, OFF..., you can define your own default clock sequence using clock presets.

See [Creating clock presets](#) on page 20.

1. Select **Timesheet**.
2. Click the **Turn ON config mode** icon.
3. Select any employee's timesheet and click **Load**.
4. Click the localization (orange diamond) icon next to the **Clocks** field in the header.

The **Field Localization** window is displayed for the **WRKS\_CLOCKS** field.

5. In the **Field Parameters** text box, set the sequence parameter to the default clock sequence, such as:

### Field Parameter

```
sequence="ON, START BREAK, END BREAK, OFF"
```

### Note:

The values in the sequence must be defined as presets in the system. In this example, presets must be defined for ON, START BREAK, END BREAK, and OFF clocks. If a sequence contains a value that is not defined as a preset, the ON/OFF sequence is used by default.

Using the example clock sequence, the default preset for the first clock is ON. If an ON clock is entered in the timesheet, the default preset for the next clock is set to START BREAK, followed by STOP BREAK and OFF.

If the last clock in the sequence is entered, the preset for the next clock defaults to the first clock in the sequence. In this example, if an OFF clock is entered in the timesheet, the preset for the next clock defaults to ON.

If a sequence is broken, the default preset is determined by the most recent existing clock that falls within the sequence. Assume the current clocks on the timesheet are ON, START BREAK, END BREAK, DEPARTMENT. In this example, the default preset for the next clock is OFF because END BREAK was the last recognized entry within the defined sequence.

6. Click **Save** and close the window.
7. Click the **Turn OFF config mode** icon.

When a user enters a clock on the timesheet, the default preset for the next clock is set to the next value in the defined sequence.



When a user adds clocks to a day with clocks already applied on it, the timesheet automatically continues the sequence. For example, assume an employee has already recorded an ON clock on the day and it has been applied to the timesheet. Using the example clock sequence, when a user adds a new clock, the preset defaults to START BREAK (the next preset in the sequence).

## Disabling clock preview on hover

By default, when a user hovers over a clock, the clock's attributes are displayed read-only in a hover layer. For example, a time code clock has a time code value associated with it. Similarly, a docket clock may have a specific docket order number.

For editable clocks, you can disable the clock preview on hover.

1. Select **Timesheet**.
2. Click the **Turn ON config mode** icon.
3. Select any employee's timesheet and click **Load**.
4. Click the localization (orange diamond) icon next to the **Clocks** field in the header.

The **Field Localization** window is displayed for the **WRKS\_CLOCKS** field.

5. In the **Field Parameters** text box, set the previewClocks parameter to **false**:

```
previewClocks=false
```

6. Click **Save** and close the window.
7. Click the **Turn OFF config mode** icon.

Users must click on a clock to view its attributes.

### Note:

Clicking on the clock puts the user at risk of inadvertently editing the clock.

## Hiding non-ON/OFF clocks by default

By default, all employee clocks for a given day are displayed on the timesheet. If your company records a high number of labor-related clocks each day, the string of clocks can become extremely long. To minimize the number of clocks that are displayed on the timesheet, you can hide (collapse) all non-ON/OFF clocks by default.

### Note:

If an employee clocks on and off multiple times a day, all of these clocks are displayed in the collapsed view. Showing only the first and last clocks is not supported. Labor-related clocks that have been identified as ON clocks using the TREAT\_AS\_ON parameters are also displayed in the collapsed view.

1. Select **Timesheet**.
2. Click the **Turn ON config mode** icon.

3. Select any employee's timesheet and click **Load**.
4. Click the localization (orange diamond) icon next to the **Clocks** field in the header.

The **Field Localization** window is displayed for the **WRKS\_CLOCKS** field.

5. In the **Field Parameters** text box, set the minimizeOnLoad parameter to **TRUE**:

```
minimizeOnLoad=TRUE
```

If a parameter value is not set, the default is **FALSE** (all clocks are displayed).

6. Click **Save** and close the window.
7. Click the **Turn OFF config mode** icon.

If the clock string includes non-ON/OFF clocks, they are hidden by default as shown by the >> indicator. You can expand the clock string to show all applied clocks by clicking the indicator. The indicator toggles, so clicking the indicator again (now displayed as <<) reverts to displaying only the ON/OFF clocks.

**Note:**

When the timesheet is saved, it reverts to its default view (collapse or expand) as controlled by the minimizeOnLoad parameter.

### Expand and Collapse Toggle for All Days

The >> within the clock bubble string allows you to expand or collapse the punches on a single day. You can also add a toggle to expand and collapse the clock bubble string on all days within the timesheet. This toggle appears in the work summary row:

Clocks	Time Code Summary
+ >> 08:00 >> 16:00	WRK 8:00
+ >	WRK 8:00
+ > 08:00 16:00	BRK 8:00
+ > 08:00 >> 16:00	BRK 8:00
+ >	WRK 8:00

To add this toggle, use the /system/UTA/dailytimesheet/ENABLE\_OTHER\_CLOCKS\_TOGGLE registry setting.

ENABLE_OTHER_CLOCKS_TOGGLE value	Behavior
TRUE	Display the toggle in the work summary row.
FALSE	Hide the toggle.

## Creating labor shortcuts

To make it easier to apply and control labor-related changes, you can create labor shortcuts. A labor shortcut defines the labor metric fields that are updated when the shortcut is used. For example, a shortcut can be used to change the job, project, department, and docket values of a work detail simultaneously. When used with the Apply Pay Rates Rule, a shortcut can also alter the pay rate for the period covered by the shortcut.

By creating shortcuts, organizations minimize incompatible combinations of various labor metric values. Individual labor metric values can be configured as uneditable, so that the provided shortcut is the sole means for altering timesheet labor details.

1. Select **Maintenance > Labor Metrics > Labor Shortcut**.
2. Click **Create New Entry**.
3. Specify this information:

### **Name**

Specify a name for the labor shortcut.

### **Description**

Optionally, specify a description for the labor shortcut.

### **Start Date**

Select the earliest work date that this labor shortcut can be used.

### **End Date**

Select the latest work date that this labor shortcut can be used. If there is no end date, specify **01/01/3000**.

4. Click **Save**.
5. In the Labor Shortcut Details section, click the **new row** icon, and specify the instructions for the labor shortcut:

### **Effective Date**

Select the effective date of the shortcut.

The details of the instructions are date-effective. For example, the labor metric fields that get updated when the shortcut is used in 2016 and 2017 could be different. In this example, the effective date of the 2016 details would be January 1, 2016 and the effective date of the 2017 details would be January 1, 2017.

### **Rate**

Specify the rate that this shortcut applies to the Rate column of the work details. If left blank, the rate is not modified by this shortcut.

See [Manipulating rates and labor shortcuts](#) on page 29.

**Time Code**

Select the time code that this shortcut applies to the Time Code column of the work details. If left blank, the time code is not modified by this shortcut.

**Note:**

When the labor shortcut is applied, the **Hour Type** column is also updated with the default hour type that is defined for the selected time code. You can override the default using the **Hour Type** field.

**Hour Type**

Select the hour type that this shortcut applies to the **Hour Type** column of the work details. If left blank, the hour type is not modified by this shortcut.

**Job**

Select the job that this shortcut applies to the **Job** column of the work details. If left blank, the job is not modified by this shortcut.

**Note:**

When the labor shortcut is applied, an error occurs if the employee is not assigned to this job.

**Department**

Select the department that this shortcut applies to the **Department** column of the work details. If left blank, the department is not modified by this shortcut.

**Project**

Select the project that this shortcut applies to the **Project** column of the work details. If left blank, the project is not modified by this shortcut.

**Docket**

Select the docket that this shortcut applies to the **Docket** column of the work details. If left blank, the docket is not modified by this shortcut.

**Team**

Select the team that this shortcut applies to the **Team** column of the work details. If left blank, the team is not modified by this shortcut.

**Quantity**

Specify the quantity that this shortcut applies to the **Quantity** column of the work details. If left blank, the quantity is not modified by this shortcut.

**Note:**

This field is hidden by default. To enable the field, configure the **Field UI** localization setting of the **LSCD\_QUANTITY** field in config mode.

**Flag 1..Flag 10**

Specify the flag values that this shortcut applies to the **Flag** columns of the work details. If a value is left blank, the corresponding Flag column is not modified by this shortcut.

**Note:**

The flag fields are hidden by default. To enable a flag field, configure the **Field UI** localization setting of the **LSCD\_FLAG[1..10]** field in config mode.

**Udf 1..Udf 10**

Specify the UDF values that this shortcut applies to the **UDF** columns of the work details. If a value is left blank, the corresponding UDF column is not modified by this shortcut.

**Note:**

The UDF fields are hidden by default. To enable a UDF field, configure the **Field UI** localization setting of the **LSCD\_UDF[1..10]** field in config mode.

**Comments**

Specify the comments that this shortcut applies to the **Comments** column of the work details. If left blank, the Comments column is not modified by this shortcut.

**Note:**

This field is hidden by default. To enable the field, configure the **Field UI** localization setting of the **LSCD\_COMMENTS** field in config mode.

You can set up a different set of instructions for another effective date by clicking the **new row** icon. Only one set of instructions can be effective at any given time.

6. Click **Save** to save the instructions for the labor shortcut.
7. Optionally, in the Labor Shortcut Security section, click the **new row** icon, and specify this information:

**Labor Metric Security**

Select the labor metric security group to associate to the labor shortcut.

You can use labor metric security to control the group of employees for which the shortcut is valid. For example, you can associate a collection of shortcuts for California employees and a different collection of shortcuts for New York employees.

You can associate the labor shortcut to additional labor metric security groups by clicking the **new row** icon.

8. Click **Save** to save the labor metric security information for the shortcut.

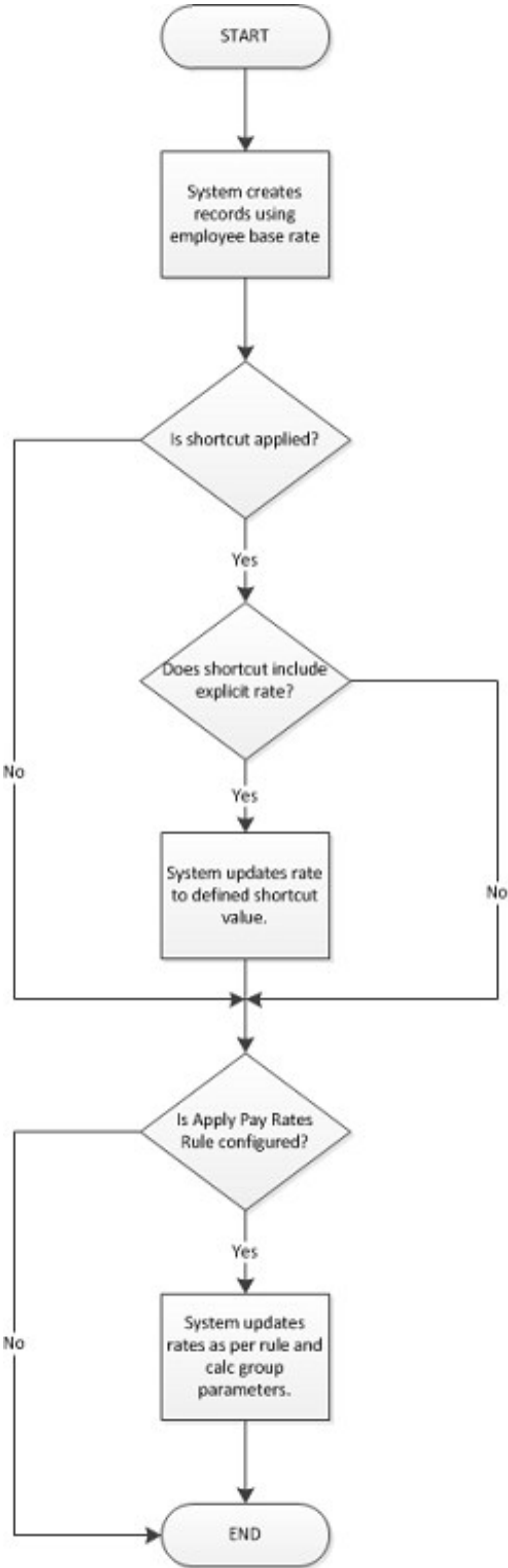
After creating a labor shortcut, you can apply it to an employee's timesheet.

See [Applying labor shortcuts to record labor allocation changes](#) on page 65.

## Manipulating rates and labor shortcuts

In addition to using labor shortcuts to flip multiple labor metric values in a single action (including rate), shortcuts can be used with the Apply Pay Rates Rule and the Calc Group Rate table to further alter the rate at which a segment of time is to be paid.

This diagram shows the process flow of how rates are applied within Workforce Management:



The Calc Group Rate table provides a high level of flexibility when it comes to defining rate instructions for a calculation group.

See “Calc Group Rate Settings panel (CALC\_GROUP\_RATE table)” in the *Implementation and Administration Guide*.

The Calc Group Rate table contains parameters that let implementations define specific work detail values that must be present for the rate instruction to apply. The most commonly used of these attributes is Job, since jobs are directly related to rates. Further granularity is possible by including other specific labor metric values that must be present too. To configure a rate instruction with the same values as those found in a defined shortcut, implementations can instruct the system to perform an additional rate alteration when the specific collection of labor metric values is encountered.

### Examples: Cal Group Rate table

This table shows how to configure various rate instructions. In these examples, we will assume that the instructions for the Calc Group Rate table have been configured to fire when a specific job (for example, CASHIER) is worked.

Desired Rate	Rate Type	Rate Value	Rate Mode	Description
Pay the defined shortcut rate	Percentage	0	As-is	Looks at the current rate and uses it without making any comparisons or changes.
Pay the higher of the defined shortcut rate and the employee base rate	Percentage	0	Greatest	Compares the current rate with zero changes against the base rate and uses the greater of the two values.
Pay the higher of the job rate and the employee base rate	Job		Greatest	Compares the job rate (as per the employee's job assignment) against the base rate and uses the greater of the two values.
Pay the assigned job rate level	Job		As-is	Uses the job rate (as per the employee's job assignment) without any comparison or changes.
Pay the employee base rate				This is the default behavior if none of the other calc group rules apply.

#### Note:

To provide additional rate instructions beyond the explicit shortcut rate, you must configure the appropriate rules for each affected calculation group. When configuring the Apply Pay Rates Rule for those calculation groups, ensure the Rate Type parameter is set to **Table**.

See "Apply Pay Rates Rule" in the *Implementation and Administration Guide*.

## Setting up DBLookup filters for inline edits of detail/premium fields

You can configure the application to use filters on DBLookups (database lookups). Filtering lookups is useful to present only a relevant subset of selections to the user, based on a prior selection. For example, for users making inline edits of work details, you can filter the values in the **Department** lookup based on what is selected in the **Team** lookup.



**Note:**

This section covers setting up DBLookup filters in the inline edit of the Daily Timesheet.

See “Filtering DBLookups” in the *Implementation and Administration Guide* for general information on setting up DBLookup filters in the application.

**To set up a DBLookup filter for inline edits:**

1. Identify the field that is used to filter the DBLookup. This is the master input field.
2. Identify the DBLookup being filtered. This is the slave input field.
3. Create an XPath expression to select the value of the master input field (relative to the slave input field). The XPath is included in the SQL expression of the slave input field (Step 4).

See [Creating the XPath expression](#) on page 34.

4. Modify the SQL expression of the slave input field. The SQL expression links the master input field with a slave input field to extract the data you want to display in the filtered DBLookup.

See [Modifying the SQL expression](#) on page 37.

5. Configure the DBLookup of the slave input field to use the SQL expression.

See [Configuring the DBLookup of the slave input field to use the SQL expression](#) on page 39.

### Example: Filtering the Department lookup based on the selected team

In this example, the Team lookup is the master input field and the Department lookup is the slave input field.

For the Details row, the SQL expression for the Department lookup is as follows:

```
sourceType='SQL'  
width='7'  
source='select DEPT_NAME, DEPT_LOC_NAME, WBT_NAME  
from VL_DEPARTMENT, WORKBRAIN_TEAM  
WHERE VL_DEPARTMENT.WBT_ID = WORKBRAIN_TEAM.WBT_ID AND TO_DATE(cast(?  
as char(17)), \'yyyymmdd hh24miss\') <= DEPT_END_DATE and  
DEPT_START_DATE <= TO_DATE(cast(? as char(17)), \'yyyymmdd  
hh24miss\')'  
sourceParams='STRING==#request.WORK_DATE#~|~STRING==#request.WORK_DATE#'  
sourceDisplayFields='DEPT_LOC_NAME'  
locale='en'  
labelFieldStatus=edit  
masterSlaveUseXPath='true'  
masterInputFields='[ancestor::tr/td[@data-field=\'WBT_NAME\']/input]'  
masterDataFields=[WBT_NAME]
```

Only the active departments (DEPT\_LOC\_NAME) that are associated with the currently selected team (WBT\_TEAM) are displayed in the **Department** lookup. The actual team name is retrieved using the XPath expression specified in the **masterInputFields** element.

#### Note:

The queries in this section assume you are using an Oracle database. For other databases, the functions must be changed accordingly. In this case, the TO\_DATE function must be changed to the appropriate function on your database.

## Creating the XPath expression

Within the inline edit, all the visible detail and premium fields have a data-field attribute, for example:

```
<tr class="detail" id="X0_0">  
  ...  
  <td data-field="DEPT_NAME">...</td>  
  ...
```

```

<td data-field="WBT_NAME">
  <input name="X000010" type="hidden" value="IT">
  ...
</td>
...
</tr>

```

You can use the value of the **data-field** attribute to identify the master input field by name in the XPath. The same names are used to configure the fields.

The fields in the Details row of the inline edit have these names:

Detail Field	Value of data-field Attribute
Start Time	WRKD_START_TIME
End Time	WRKD_END_TIME
Hours	WRKD_MINUTES
Rate	WRKD_RATE
Time Code	TCODE_NAME
Hour Type	HTYPE_NAME
Job	JOB_NAME
Department	DEPT_NAME
Start Time	WRKD_START_TIME
End Time	WRKD_END_TIME
Hours	WRKD_MINUTES
Rate	WRKD_RATE
Time Code	TCODE_NAME

In our example, the **Team** lookup in the Details row can be identified by the WBT\_NAME value.

Similarly, the fields in the Premiums row of the inline edit have these names:

Detail Field	Value of data-field Attribute
Start Time	PREM_WRKD_START_TIME
End Time	PREM_WRKD_END_TIME
Hours	PREM_WRKD_MINUTES
Rate	PREM_WRKD_RATE
Time Code	PREM_TCODE_NAME
Hour Type	PREM_HTYPE_NAME
Job	PREM_JOB_NAME
Department	PREM_DEPT_NAME
Project	PREM PROJ NAME
Docket	PREM_DOCK_NAM
Team	PREM_WBT_NAME
Flag 1..10	PREM_WRKD_FLAG1..10
UDF 1..10	PREM_WRKD_UDF1..10

In our example, the **Team** lookup in the Premiums row can be identified by the PREM\_WBT\_NAME value.

**Note:**

The premium field names have a PREM\_ prefix.

**Syntax of the XPath**

To select the value of the master input field (relative to the slave input field) in the Details or Premiums row, use this format:

```
ancestor::tr/td[@data-field='value']/input
```

For example, to select the value of the **Team** lookup in the Details row, use this XPath:

```
ancestor::tr/td[@data-field='WBT_NAME']/input
```

Similarly, to select the value of the **Team** lookup in the Premiums row, use this XPath:

```
ancestor::tr/td[@data-field='PREM_WBT_NAME']/input
```

In the SQL expression, the XPath is specified in the masterInputFields element, for example:

```
masterInputFields=' [ancestor::tr/td[@data-field=\'WBT_NAME\']/input] '
```

**Note:**

For XPath to work, both the master input field and the slave input field must be displayed on the page (cannot be hidden).

## Modifying the SQL expression

The SQL expression links the master input field with a slave input field to extract the data you want to display in the filtered DBLookup. The SQL expression resides in the slave input field.

**Note:**

You must know the actual field names in the required table to modify the SQL expression and get the desired results.

### Example: Filtering the Department lookup based on the selected team

Currently, the Department lookup is configured to show all the active departments on the work date.

```
sourceType='SQL'  
width='7'  
source='select DEPT_NAME, DEPT_LOC_NAME from VL_DEPARTMENT  
WHERE TO_DATE(cast(? as char(17)), \'yyyymmdd hh24miss\') <=  
DEPT_END_DATE and DEPT_START_DATE <= TO_DATE(cast(? as char(17)),  
\'yyyymmdd hh24miss\') '  
sourceParams='STRING==#request.WORK_DATE#~|~STRING==#re  
quest.WORK_DATE#'  
locale='en'  
labelFieldStatus=edit
```

In this example, you want to configure the **Department** lookup to show only the active departments that are associated with the currently selected team. To accomplish this, you must set up a master-slave relationship between team and department.

For the detail row, modify the SQL expression for the **Department** lookup as follows (changes in bold):

```
sourceType='SQL'  
width='7'  
source='select DEPT_NAME, DEPT_LOC_NAME, WBT_NAME
```

```

from VL_DEPARTMENT, WORKBRAIN_TEAM
WHERE VL_DEPARTMENT.WBT_ID = WORKBRAIN_TEAM.WBT_ID AND TO_DATE(cast(?
as char(17)), \'yyyymmdd hh24miss\') <= DEPT_END_DATE and
DEPT_START_DATE <= TO_DATE(cast(? as char(17)), \'yyyymmdd
hh24miss\')'

sourceParams='STRING==#request.WORK_DATE#~|~STRING==#request.WORK_DAT
E#'

sourceDisplayFields='DEPT_LOC_NAME'
locale='en'
labelFieldStatus=edit
masterSlaveUseXPath='true'
masterInputFields=' [ancestor::tr/td[@data-field=\'WBT_NAME\']/input]'
masterDataFields=[WBT_NAME]

```

For the premium row, modify the SQL expression for the **Department** lookup as follows (changes in bold):

```

sourceType='SQL'
width='7'
source='select DEPT_NAME, DEPT_LOC_NAME, WBT_NAME
from VL_DEPARTMENT, WORKBRAIN_TEAM
WHERE VL_DEPARTMENT.WBT_ID = WORKBRAIN_TEAM.WBT_ID AND TO_DATE(cast(?
as char(17)), \'yyyymmdd hh24miss\') <= DEPT_END_DATE and
DEPT_START_DATE <= TO_DATE(cast(? as char(17)), \'yyyymmdd
hh24miss\')'

sourceParams='STRING==#request.WORK_DATE#~|~STRING==#request.WORK_DAT
E#'

sourceDisplayFields='DEPT_LOC_NAME'
locale='en'
labelFieldStatus=edit
masterSlaveUseXPath='true'
masterInputFields=' [ancestor::tr/td[@data-
field=\'PREM_WBT_NAME\']/input]'
masterDataFields=[WBT_NAME]

```

### SQL expression elements

Your database administrator will have detailed information about the SQL expression elements that are useful in your unique system. The DBLookup filtering SQL expressions have these elements:

- **sourceType**

Specifies the DataSource type:

- SQL
- REGISTERED

- **source**

Specifies the DataSource specification.

- If the sourceType is SQL, then an SQL SELECT statement must be provided.
- If the sourceType is REGISTERED, then the name of the builder class registered under the `/system/rowsource/builders` registry parameter must be provided.

The source expression element is code that tells the system from which tables to extract the master and slave input data and where to locate the data to display in the filtered slave DBLookup.

- **sourceDisplayFields**

Specifies a pipe separated list of display fields. By default, all fields except the first field in the SELECT statement are displayed in the DBLookup.

- **masterSlaveUseXPath**

Indicates whether the master input field is configured using an XPath expression instead of name. For setting up DBLookup filters in the inline edit of the Daily Timesheet, this must be set to **true**.

- **masterInputFields**

Enables a master-slave relationship between fields. Specifies names of input fields narrowing down the current field's set of values.

For setting up DBLookup filters in the inline edit of the Daily Timesheet, this must be an XPath expression. The XPath expression is used to get the actual value of the master input field.

- **masterDataFields**

Enables a master-slave relationship between fields. Specifies names of data fields narrowing down the current field's set of values.

## Configuring the DBLookup of the slave input field to use the SQL expression

1. Select **Timesheet**.
2. Click the **Turn ON config mode** icon.
3. Select any employee's timesheet using the **Timesheet Selection** page, and click **Load**.

4. Locate the slave input field that you want to filter in the Details or Premiums row. For example, **Department**.
5. Click the localization (orange diamond) icon in the row cell of the field you want to filter. For example, **DEPT\_NAME**.

The **Field Localization** window is displayed.

6. Specify the appropriate SQL statement in the **Field Parameters** field. For example:

```
sourceType='SQL'
width='7'
source='select DEPT_NAME, DEPT_LOC_NAME, WBT_NAME
from VL_DEPARTMENT, WORKBRAIN_TEAM
WHERE VL_DEPARTMENT.WBT_ID = WORKBRAIN_TEAM.WBT_ID AND
TO_DATE(cast(? as char(17)), \'yyyymmdd hh24miss\') <=
DEPT_END_DATE and DEPT_START_DATE <= TO_DATE(cast(? as char(17)),
\'yyyymmdd hh24miss\')'
sourceParams='STRING==#request.WORK_DATE#~|~STRING==#request.WORK_DA
TE#'
sourceDisplayFields='DEPT_LOC_NAME'
locale='en'
labelFieldStatus=edit
masterSlaveUseXPath='true'
masterInputFields='[ancestor::tr/td[@data-
field=\'WBT_NAME\']/input]'
masterDataFields=[WBT_NAME]
```

See [Modifying the SQL expression](#) on page 37.

7. Click **Save** and close the window.
8. Click the **Turn OFF config mode** icon.

## Configuring the employee information card

The employee information card lets users quickly retrieve employee-related information on the timesheet without having to navigate to another part of the application. This information is displayed when the user hovers over the icon beside the employee's name of the timesheet.

The employee information card includes the employee identifier, status, pay group, and calculation group. Based on your system configuration, other information may be displayed.



**Note:**

The fields configured in the employee information card on the Daily Timesheet are also displayed on the employee information card in the Supervisor Approval Worksheet, Weekly Timesheet, and LFSO.

1. Select **Timesheet**.
2. Click the **Turn ON config mode** icon.
3. Select any employee's timesheet using the **Timesheet Selection** page, and click **Load**.
4. Beside the employee name, above the employee icon, click the localization (orange diamond) icon for **EMPLOYEE\_CARD**.

The Field Localization window is displayed for the **EMPLOYEE\_CARD** field.

5. Edit the code in the **Field Parameters** text box as required.

The **showHistoryFields** parameter is used to display fields from the employee override screen.

Fields viewable to the user are included in the card regardless of whether the field contains data. For example:

```
showHistoryFields="EMP_NAME,EMP_STATUS,EMP_PAYGRP_NAME,EMP_CAL  
CGRP_NAME,EMP_FLAG2,EMP_VAL16,TZ_ID"
```

The **showUDFs** parameter is used to display employee user-defined fields. Only the UDF fields assigned to the employee are displayed. For example:

```
showUDFs="HOME_PHONE,MOBILE_PHONE,EMAIL"
```

The **showJobs** parameter is used to display information on the employee's jobs, for example:

```
showJobs="JOB_NAME, EMPJOB_START_DATE, EMPJOB_END_DATE, EMPJOB_PRE  
FERRED"
```

With this configuration, all of the employee's qualified jobs (effective dated) are displayed. To show only the employee's preferred job, add the **showPreferredJobsOnly** parameter too:

```
showPreferredJobsOnly=true
```

**Note:**

The fields included on the employee information card respect element security, so that specific fields can be viewable or hidden for specific security groups.

6. Click **Save** and close the window.
7. Click the **Turn OFF config mode** icon.

## Chapter 5: Supervisor setup

As a supervisor, you must perform some setup for employees before they can use the Daily Timesheet. Employees require a schedule of start and end times and a planned work assignment, called a default labor allocation.

Employee schedules are automatically created from their shift pattern, an ordered list of shifts that employees are scheduled to work. Shift patterns include all the shifts and days off that consist of a complete, repeating cycle.

Default labor allocations specify what tasks employees work on, and for how long, during the week. The amount of time employees work against specific metrics such as jobs, projects, and departments is tracked.

You must perform these tasks to set up employees to use the Daily Timesheet:

1. Find appropriate shift patterns.

System administrators create shift patterns to reflect the different schedules that employees work. To assign the appropriate pattern to an employee, you must view the details of the existing shift patterns.

See “Viewing existing shift patterns” and “Viewing existing shifts” in the *Implementation and Administration Guide*.

2. Assign shift patterns to employees.

See "Assigning schedules" in the *Implementation and Administration Guide*.

3. Verify default labor allocations.

See “Viewing existing employee overrides” in the *Implementation and Administration Guide*.

### Setting the default approval worksheet

You can access your preferred approval form through the **My Approval** menu option. When you first click the **My Approval** menu option, you select the worksheet that you want to review and approve timesheets. These are the options:

- Supervisor Approval Worksheet: A detailed summary of hours worked by employees using the Daily Timesheet, organized by employee or date.
- Supervisor Summary: A detailed summary of hours worked in a week organized by team. You can authorize both submitted and un-submitted timesheets from the Supervisor Summary.
- Pay Period Summary: A detailed summary of hours worked in a pay period, organized by team.

1. Select **My Approval**.

2. Select a preferred worksheet type.
3. Select which timesheets to include on your approval worksheet by filling in the appropriate fields.

See [Viewing summaries](#) on page 49.

4. Click **Save**.

## Changing the default approval worksheet

You can switch between the different approval worksheets or change the selection parameters to include different timesheets.

1. Select **Maintenance > Employees > Default Approval Worksheet**.
2. Select a preferred worksheet type.
3. Select which timesheets to include on your approval worksheet by filling in the appropriate fields.

See [Viewing summaries](#) on page 49.

4. Click **Save**.

## Chapter 6: Navigation

This section describes how to view and navigate the Daily Timesheet.

### Viewing timesheets

You use the selection parameters page to select the timesheets you want to view. Specify your search terms in the available fields, called filters, and the application returns any matches.

For example, you can search for the timesheets of employees in the Accounting team by specifying **Accounting** in the **Team** field. The application returns the timesheets of all the Accounting team members.

The application treats multiple filters as AND searches. Therefore, only timesheets containing all the specified terms are displayed. For example, specifying the HOURLY calculation group and the TEMP\_EMPLOYEES pay group returns the timesheets of employees with both an HOURLY calculation group and a TEMP\_EMPLOYEES pay group. Leaving a filter blank is the same as entering **ALL**, so leaving every filter blank returns every timesheet you are authorized to view.

#### **Note:**

The maximum number of timesheets you can load at once is determined by the MAX\_NUMBER\_OF\_EMPLOYEES registry parameter.

See the *Registry Parameter Reference Guide*.

You can search for timesheets using these filters:

- Employee
- Date
- Team (optionally including sub teams)
- Calculation group
- Payroll group
- Shift pattern

#### **Note:**

You require security permissions to view timesheets. Only the timesheets you are authorized to view are displayed.

### Searching for timesheets

1. Select **Timesheet**.
2. Specify this information for the search terms:

### **Employee**

Select an employee to search for their timesheet. To search for multiple employees, select multiple check boxes in the lookup list.

### **Team**

Select a team to search for timesheets of its team members.

### **Include Sub Teams**

Select the check box to include the timesheets of sub team members.

### **Pay Group**

Select a pay group to search for the timesheets of any employee in the group.

### **Calculation Group**

Select a calculation group to search for the timesheets of any employee in the group.

### **Shift**

Select a shift pattern to search for the timesheets of any employee working this shift pattern.

### **Dates**

Specify the dates of the timesheets you want to view:

- To view timesheets in the daily view, select **Yesterday**, **Today**, or **Manual Date Range** (specifying the same start and end date) from the **Date Selection** drop-down list. If only one employee is selected, only that employee's timesheet is displayed for the single day.
- To view timesheets in the date range view, select **Current Pay Period**, **Last Pay Period**, **Next Pay Period**, **This Week**, or **Last Week** from the **Date Selection** drop-down list. A single employee's time is displayed over a range of days. Date selection is based on the user's local time. Multiple employees can be selected with the date range view, but only one employee is displayed at a time.

### **Note:**

When viewing timesheets for multiple employees by current pay period, next pay period, or last pay period, they must have the same pay period. Pay periods are based on the employee's pay group.

You can use any combination of the filters at one time to find specific timesheets. For example, to find any employees working a specific shift pattern from a specific team, specify both the team and shift pattern. Any matching timesheets are displayed.

3. Select the authorization status from the **Authorization** drop-down list:
  - **All**: Displays all the timesheets.
  - **Fully Authorized**: Displays timesheets that have been authorized.
  - **Unauthorized**: Displays timesheets that have not been authorized.
4. Select the display order for the timesheets from the **Order By** drop-down list.

5. Click **Load** to load the timesheets that meet the search criteria. If there are no timesheets that meet the search criteria, an error message is displayed.

## Navigating timesheets

In the Daily Timesheet, timesheets are displayed in two different views: the daily view and the date range view.

### Navigating the daily view

There are several ways to browse through the timesheets:

- To move back or forward a day, use the back and forward arrows near the top of the page.
  - Click the back arrow to view the previous day's timesheet of the selected employee.
  - Click the forward arrow to view the next day's timesheet of the selected employee.
- To move up or down a page of records, use the up and down arrows near the bottom of the page.
  - Click the up arrow to view the previous page of records.
  - Click the down arrow to view the next page of records.

#### Note:

System administrators set the number of rows that are displayed on one page of the timesheet.

### Navigating the date range view

There are several ways to browse through the timesheets:

- To move back or forward a time period, use the back and forward arrows near the top of the page.
  - Click the back arrow to view the previous time period's timesheets of the selected employee.
  - Click the forward arrow to view the next time period's timesheets of the selected employee.

The length of the time period depends on the date range that is selected from the **Timesheet Selection** page. For example, with a range of thirty days, clicking the forward or back arrows moves through thirty days of timesheet records.

- To move back or forward an employee, use the forward and back arrows next to the employee's name, near the top of the page.
  - Click the back arrow to view the previous employee's timesheet records.
  - Click the forward arrow to view the next employee's timesheet records.

- To jump to an employee, select the employee's name from the employee drop-down list.
- To move up or down a page of records, use the up and down arrows near the bottom of the page.
  - Click the up arrow to view the previous page of records.
  - Click the down arrow to view the next page of records.

**Note:**

System administrators set the number of rows that are displayed on one page of the timesheet.

## Viewing timesheet information

Employees and supervisors can access a variety of information from the Daily Timesheet including:

- Number of available sick, vacation, or personal days
- Employee work details on which jobs, projects, departments, or dockets that employees have spent their time
- Applied overrides, which show changes that are made to the timesheet
- Clock details
- Other information such as logs, rules applied, or retroactive adjustments
- Premiums earned
- Irregular time codes that were used
- Clock approval status

## Viewing sick and vacation days of an employee

You can view the balance of sick and vacation days that are available to a specific employee.

1. Click the icon beside the employee's name near the top of the timesheet.
2. Scroll down to the Employee Balances section to view the number of vacation and sick days.

## Viewing employee work details

You can view work details of employees from their timesheet. Work details include when the employee worked and the times of any breaks through the day. They also reflect whether the employee took a vacation or a sick day, or was in training. Work details also contain a breakdown of how an employee's time was spent during a day. For example, working for a department or team, or on a particular job, project, or docket.

To view the work details of a day, expand the row of a particular day to view the work details for that day. The inline details are displayed, including how many hours the employee worked and on which job, department, project, docket, and team.

To view the work details for all days in the selected date range, expand the header row.

## Viewing applied overrides

By default, the Daily Timesheet does not display applied overrides.

To view the overrides applied to a timesheet, click **Show Edits**.

Any applied overrides are displayed with the details of what was modified on the timesheet. For example, an override that changed the department the employee worked in for the shift would display **Department=** next to the override times.

If you do not have the security permissions to view a timesheet element, a set of asterisks **\*\*\*=\*\*\*\*\*** is displayed in its place. Your system administrator can grant you permissions to timesheet elements.

## Viewing clock details

You can view the clock entries that are pending, rejected, or applied for a particular date.

1. Click a date link to view the work details for that day. The **Work Details** window is displayed.
2. From the **View** drop-down list, select one of these options:
  - **Clocks Pending:** Displays pending clocks.
  - **Clocks Rejected:** Displays rejected clocks.
  - **Clocks Applied:** Displays applied clocks (location data is not displayed).

You can use the **Prev** and **Next** buttons to browse through the days.

## Viewing the status of time approval records

If a time approval record has been rejected, the **Issues** icon will be displayed for the day in question.

1. Click the **Issues** icon for details.
2. To view the current Time Approval Status for a day, scroll to the right on the timesheet to display the column.

Possible values for this column are **CREATE, RECREATE, PENDING, APPROVED, and REJECTED**.



## Viewing other information about the work details

Other details, such as rules applied, retroactive adjustments that are made to the timesheet, and various logs are accessible from the Work Details pop-up window.

1. Click the date in the row of a particular day to view the work details. The **Work Details** window is displayed.
2. Select the information you want to view from the **View** drop-down list.

You can use the **Prev** and **Next** buttons to browse through the days.

## Viewing premiums

Any premiums an employee earns are displayed on their timesheet.

To view the premiums an employee earned, expand the row of a particular day to view if any premiums were earned that day. The inline details are displayed, including how many hours the employee worked and on which job, department, project, docket, and team.

Alternatively, you can click a date link to view the work details for that day in the **Work Details** window.

## Viewing irregular time codes

Irregular time codes are displayed in the **In Code** and **Out Code** fields if they occur as the first or last time code that is used for the day. An irregular time code is displayed in the **Full Day Code** field if it was the only code that was used for the entire day. These fields are blank if regular time codes are used as the first and last codes for the day.

### Note:

System administrators define the time codes that are irregular. Only the time codes that are marked irregular are highlighted on the Daily Timesheet when they occur as the first, last, or full day time code.

## Viewing summaries

The application summarizes information from the timesheets. You can view these types of summaries:

- Code Summary, which shows the number of hours that are reported against each time code on the timesheets.
- Pay Period Summary, which shows a summary of the hours that employees worked and the details of their labor allocation for any past week.
- Supervisor Summary, which shows the hours that employees worked and the details of their labor allocation for any week.

- Supervisor Approval Worksheet, which you can use to review and approve the timesheets of a group of employees.

### Viewing the Code Summary

To view the Code Summary, scroll down to the Code Summary section.

The amount of hours that were worked per day, broken down by time code and hour type, is displayed.

### Viewing the Pay Period Summary

The Pay Period Summary shows a summary of the hours that employees worked and the details of their labor allocation for any past week. Data is gathered from Daily and Weekly Timesheets, depending on which the employees use, and is summarized by pay period.

You select the timesheets to include in the Pay Period Summary by searching for employees, teams, shift patterns, or calculation groups.

#### Note:

Because the summary requires timesheet data for the entire work week, there may be cases where Daily Timesheet data is not included. Any employees with unsubmitted days during the pay period are not included in the summary.

1. Ensure that the default approval worksheet is set to **Pay Period Summary**.

See [Changing the default approval worksheet](#) on page 43.

2. Select **My Approval**.

3. Specify this information:

#### Pay Groups

Select the payroll group you want to include in the summary.

#### Pay Period Selection

Select the pay period from which to display timesheets.

#### Start Date

Specify the date of the pay period to include if you selected **Manual Date Range** from the Pay Period Selection drop-down list.

#### Include Pay Periods

Select the number of previous pay periods to include in the summary. For example, **-4** includes four previous pay periods.

#### Employees

Select the employee timesheets that are included in the summary. You can include any number of employees by specifying a comma between each entry or selecting multiple check boxes from the lookup.

### Teams

Select the teams you want to include in the summary.

### Include Sub Teams

Select the check box to include the timesheets of sub team members as well.

### Shift Patterns

Select a shift pattern to include the timesheets of any employee working this shift pattern.

### Calc Groups

Select a calculation group to include the timesheets of any employee in the group.

### Display per Page

Select how many timesheets to include on one summary page.

4. Click **Go**.

#### Note:

Every time code may not be displayed on the Pay Period Summary. System administrators set the time codes that are displayed.

## Viewing the Supervisor Summary

The Supervisor Summary shows the hours that employees worked and the details of their labor allocation for any week. Data is gathered from Daily and Weekly Timesheets, depending on which employees use. From the summary, supervisors can authorize both submitted and unsubmitted timesheets.

You select the timesheets to include in the Supervisor Summary by searching for employees, teams, shift patterns, or calculation groups.

#### Note:

Because the summary requires timesheet data for the entire work week, there may be cases where Daily Timesheet data is not included. Any employees with unsubmitted days during the pay period are not included in the summary.

1. Ensure that the default approval worksheet is set to **Supervisor Summary**.

See [Changing the default approval worksheet](#) on page 43.

2. Select **My Approval**.

3. Do one of these:

- Specify the date of the week you want to summarize in the **Start Date** field.
- Select the week of the timesheets to summarize from the **Week Start Date** drop-down list if the **Start Date** field is left blank.

4. Select the authorization status from the **Authorization** drop-down list:

- **All Records:** Summarize all the timesheets.

- **Weekly Timesheet Authorized Records:** Includes timesheets with at least one authorized day in the summary.
- **Unauthorized:** Includes timesheets with at least one unauthorized day in the summary.
- **Fully Authorized:** Includes the timesheets with every day authorized.
- **Fully Unauthorized Timesheets only:** Includes the timesheets with every day unauthorized.

5. Select which timesheets to include from the **Timesheet Submitted** drop-down list:

- **ALL:** Views all timesheets.
- **Submitted Only:** Views submitted timesheets only.
- **Not Submitted Only:** Views only the timesheets that have not been submitted.

6. Specify this information:

#### **Employees**

Select the employee timesheets that are included in the summary. You can include any number of employees by specifying a comma between each entry or selecting multiple check boxes using the lookup.

#### **Teams**

Select the teams you want to include in the summary.

#### **Include Sub Teams**

Select the check box to include the timesheets of sub team members as well.

#### **Shift Patterns**

Select a shift pattern to include the timesheets of any employee working this shift pattern.

#### **Calc Groups**

Select a calculation group to include the timesheets of any employee in the group.

#### **Pay Groups**

Select the payroll groups you want to include in the summary.

#### **Order By**

Select the display order for the timesheets from the drop-down list.

7. Click **Go**.

Every time code may not be displayed on the Supervisor Summary. System administrators set the time codes that are displayed.

### **Viewing the Supervisor Approval Worksheet**

You can use the Supervisor Approval Worksheet to review and approve the timesheets of a group of employees. The group of employees is defined through the selection parameters page.

See the *Supervisor Approval Worksheet User Guide*.

## Chapter 7: Schedule changes

Employee schedules are set in advance using a shift pattern that reflects the employee's typical work week.

There are three types of changes that can be made to a schedule:

- **Non-elapsed time overrides:** The employee does not work their scheduled times. A non-elapsed time override records exceptions to the planned schedule.
- **Long term absences:** Employees are off work for an extended period of time. Long term absences are created to override the employee's schedule with an absent time code until the employee returns to work.
- **Planned schedule changes:** The schedule must change to reflect a staffing requirement. In the future, the employee is scheduled to work on different days or at different times.

### Scheduled hours

The Scheduled column (TS\_SCHEDULED\_HOURS) shows the total number of hours the employee is scheduled to work each day. For example, if the employee is scheduled to work from 17:00 to 01:00, 08:00 is displayed for that day. If the employee is not scheduled to work on a day, the scheduled hours value is blank.

Not all schedule details are included in the scheduled hours calculation. By default, a schedule detail is included in the calculation if both of these conditions are met:

- The time code is not an LTA (**Is LTA** flag not selected).
- The time code is not a scheduled break (see below for break definitions).

You can change the default behavior by configuring these localization parameters in config mode:

- **includeLTA**

Determines whether details with LTA time codes are included in the summary calculation. Specify one of these values:

- **true:** All details with LTA time codes are included in the calculation.
- **false:** All details with LTA time codes are excluded from the calculation. This is the default.

- **includeBreaks**

Determines whether scheduled breaks are included in the summary calculation. A break is defined as either:

- A schedule detail with a time code that has the **Is BRK** flag selected.

- A schedule detail with a defined Schedule Optimization activity that has the **Paid Activity** attribute set to **No**.

Specify one of these values:

- **true**: All scheduled break details are included in the calculation.
- **false**: All scheduled break details are excluded from the calculation. This is the default.

- **decimalMinutes**

Determines whether the scheduled hours value is displayed in time or decimal format.

Specify one of these values:

- **true**: The value is displayed in decimal format (for example, 8.50).
- **false**: The value is displayed in time format (for example, 8:30). This is the default.

## Non-elapsed time overrides

The time an employee works does not always follow their scheduled week. Employees take vacation or sick days, arrive late, leave early, attend doctor's appointments, and so on. These changes are recorded as non-elapsed time overrides by either the employee or the supervisor on their timesheet.

Non-elapsed time overrides are recorded for specific times on the day they occurred. For example, to record arriving an hour late, at 10:00 AM instead of 9:00 AM on Tuesday morning, create a non-elapsed time override on Tuesday.

The duration of the override is as long as the employee's time worked is different from the schedule. A late employee starts being late the minute they do not arrive for their scheduled start time. Similarly, for an employee who left work early, the override starts the minute they left work too soon.

The employee or supervisor also records the reason the employee's time differs from their schedule. The application has several default time codes, which describe the reason for the override.

This table shows the default time codes:

Time Code	Description
BRK	Any unpaid break
LB	A long break
LATE	The employee arrived late
LE	The employee left early

Time Code	Description
PGR	Paid grace time
REST	Paid rest time
SICK	Paid sick day
UGR	Unpaid grace day
VAC	Paid vacation day
VAC-ADV	Unpaid vacation day that uses up a vacation day
VAC-PAY	Paid vacation day that does not use up a vacation day
VAC-U	Unpaid vacation

For example, an employee who was scheduled to start at 9:00 on Tuesday morning arrives an hour late at 10:00. In this case, the employee would record a non-elapsed time override with the LATE time code, starting at 9:00 AM and ending at 10:00 AM.

### Recording non-elapsed time overrides

1. Click the pencil icon in a day's row to change when the employee worked that day. For example, if the employee left early on Thursday, click the pencil icon in Thursday's row.
2. Select **Code** from the pop-up window.
3. Specify this information:

**Time Code**

Select the time code that best describes the reason for the override.

**Start Time**

Specify the time the override started. This time is when the employee's time worked starts to differ from the schedule.

**End Time**

Specify the time the override stopped. This time is when the employee's time begins to be on schedule.

**Override Comment**

Specify any comments.

4. Click **Submit** to save the override. The adjusted time is displayed in the Code Summary section near the bottom of the Daily Timesheet.



## Deleting non-elapsed time overrides

You can delete any non-elapsed time override using the **Delete** check box, displayed as a garbage can icon. Deleting an override undoes the changes that were made to the timesheet.

1. Click **Show Edits**.
2. Select the **Delete** check box next to an override to delete it.
3. Click **Submit** to save the timesheet.

## Editing non-elapsed time overrides

1. Click **Show Edits**.
2. Click the **Edit Code** link for the override.
3. Modify the fields, as necessary, and click **Submit** to save the changes.

## Copying non-elapsed time overrides

You can copy non-elapsed time overrides from the timesheet and apply them to another day on the timesheet using the **Copy** check box. The check box is displayed next to an icon of two sheets of paper.

1. Click **Show Edits**.
2. Select the **Copy** check box next to an override to copy it.
3. Select the check box next to the rows where you want the override copied.
4. Click **Submit** to save the timesheet.

## Long term absences

You set up long term absences to override an employee's expected work times with an absence code to reflect an extended leave period.

### Recording long term absences

1. Click the pencil icon in a day's row to record a long term absence starting on that day.
2. Select **LTA** from the pop-up window.
3. Specify this information:

#### **Time Code**

Select the time code that best describes the reason the employee is absent.

#### **Start Date**

Specify the starting date of the absence.

**End Date**

Specify the last date of the absence.

4. Click **Submit** to save the override.

## Planned schedule changes

The application automatically creates schedules for employees every week using their shift patterns. There are two methods to change the schedule of individual employees:

- **One time changes:** Used to create exceptions to an employee's normal schedule. Supervisors can override start, end, or break times of any days in the employee's schedule that only apply for one specific week. In addition, schedules from previous weeks can be copied to the current week, creating a one time schedule change.
- **Long-term changes:** Used when an employee's recurring schedule must change, such as an employee switching to the night shift. Supervisors can make changes to the scheduled start, end, or break times that the application assigns every week.

## One time changes

To change an employee's schedule for any specific week, you can create a schedule override, with or without breaks. Or you can copy schedules from previous weeks. Only the schedule for the selected week is changed. Schedules for the previous and following weeks are created using the employee's regular shift pattern.

### Creating schedule overrides without breaks

1. Click the pencil icon in a day's row to change the employee's schedule for that day. For example, to schedule the employee earlier on Thursday, click the pencil icon in Thursday's row.
2. Select **Sched Times** from the pop-up window.
3. Specify this information:

**Start Time**

Specify the new time the shift begins. Leave the field blank to keep the original scheduled start time.

**End Time**

Specify the new time the shift ends. Leave the field blank to keep the original scheduled end time.

**Override Comment**

Optionally, specify comments for the override, such as an explanation for the schedule change.

4. Click **Submit** to save the override.

## Creating schedule overrides with breaks

1. Click the pencil icon in a day's row to change the employee's schedule for that day. For example, to schedule the employee earlier on Thursday, click the pencil icon in Thursday's row.
2. Select **Sched Times w Breaks** from the pop-up window.
3. Specify this information:

### **Start Time**

Specify the new time the shift begins. Leave the field blank to keep the original scheduled start time.

### **End Time**

Specify the new time the shift ends. Leave the field blank to keep the original scheduled end time.

### **Override Comment**

Optionally, specify comments for the override, such as an explanation for the schedule change.

4. In the Schedule Breaks section, specify this information:

### **Break Start Time**

Specify the earliest possible start time of the break period.

### **Break End Time**

Specify the latest possible end time of the break period.

### **Break Duration**

Optionally, specify the duration of the break in minutes.

### **Break Time Code**

Select a time code that classifies the break time, for example, BRK.

### **Break Hour Type**

Select an hour type that specifies how to pay the employee for the break time. To pay employees their normal rate on their breaks, select REG. Otherwise, select UNPAID.

### **Break Default Start Time**

Optionally, specify a specific time to force the break to start at a specified time.

If this field is left blank, an employee can take their break any time after the start time.

5. Click **Submit** to save the override.

## Long term changes

Altering an employee's schedule for one specific week does not affect the repeating schedule that the application assigns week after week. You can modify the employee's shift pattern for a more permanent change.

A shift pattern tells the application what shifts to put on which days. The shifts include start, end, and break times. Select a different shift pattern for the employee or create a shift pattern if none of the available patterns are appropriate. For example, an employee changing to all evening work would require a different shift pattern.

**Note:**

System administrators can create shift patterns if none of the existing shift patterns are appropriate.

See “Assigning shift patterns” in the *Implementation and Administration Guide*.

## Chapter 8: Worked time changes

The Daily Timesheet keeps track of the amount of time employees work each day for payroll. This time can be recorded using clocks that employees swipe or punch when they start and stop work, the Employee Transaction Manager (ETM), or supplied directly on the timesheet. Elapsed time overrides are used to adjust this recorded amount of worked time whenever it does not match the hours that are worked by the employee. Any extra hours or overtime worked has to be recorded on the employee's timesheet.

The application also tracks where employees' time is spent by their default labor allocation. Employee labor is automatically charged against certain jobs, tasks, and departments. The default labor allocation also determines at what rate employees are paid. Elapsed time overrides are used to override the default labor allocation.

Elapsed time overrides serve two purposes:

- To add worked time. For example, the time that is recorded on the employee's timesheet is less than the amount of time that is worked. You can also override the pay rate to record overtime.
- To override labor allocation. For example, an employee works on a different job or task, or in a different department, than specified in the default labor allocation.

### Worked hours

The Worked column (TS\_ACTUAL\_HOURS) shows the total number of hours the employee worked each day. For example, if the employee worked from 17:00 to 01:00, 08:00 is displayed for that day. If the employee does not work on a day, the worked hours value is blank.

Not all work details are included in the worked hours calculation. Hour types that are unpaid (**Multiple** attribute set to **0**) are always excluded from the summary total. In addition, only details with summarizable hour types (**Hour Type Summarize** flag selected) are eligible to be included. Non-summarizable hour types are always excluded from the summary total.

By default, a time code is eligible to be included if all of these conditions are met:

- The time code is summarizable (**Time Code Summarize** flag selected).
- The time code is not an LTA (**Is LTA** flag not selected).
- The time code is not a break code.

You can change the default behavior by configuring these localization parameters in config mode:

- **includeLTA**

Determines whether LTA time codes are eligible to be included in the summary calculation. Specify one of these values:

- **true:** LTA time codes are eligible to be included in the calculation. Only those details with summarizable hour types that are paid (Multiple attribute not set to 0) are eligible.
  - **false:** LTA time codes are not eligible to be included in the calculation. This is the default.
- **includeBreaks**  
Determines whether break time codes are eligible to be included in the summary calculation. Specify one of these values:
    - **true:** Break time codes are eligible to be included in the calculation. Only those details with summarizable hour types that are paid (Multiple attribute not set to 0) are eligible.
    - **false:** Break time codes are not eligible to be included in the calculation. This is the default.
  - **forceIncludeTimeCodes**  
Specifies a comma-separated list of time codes that are eligible to be included in the summary calculation regardless of the includeLTA, includeBreaks, and **Time Code Summarize** settings. Only those details with summarizable hour types that are paid (**Multiple** attribute not set to **0**) are eligible. If a detail has a time code that is included in this list and a hour type with the **Multiple** attribute set to **0**, the detail is not included in the calculation of the summary total.
  - **forceExcludeTimeCodes**  
Specifies a comma-separated list of time codes that are always excluded from the summary calculation. If a detail has a time code that is included in this list, the detail is not included in the calculation of the summary total.
  - **varianceThreshold**  
Determines the difference (in minutes) between the scheduled time and worked time that is required for the worked hours value to be highlighted. The difference must exceed (in either direction) the value that is specified. The default is **0**.  
  
For example, assume the scheduled time is 8:00 and the threshold is set to **1**. If the worked time is 8:01, the worked time would not be highlighted. If the worked time is 8:02, the worked time would be highlighted.
  - **decimalMinutes**  
Determines whether the worked hours value is displayed in time or decimal format. Specify one of these values:
    - **true:** The value is displayed in decimal format (for example, 8.50).
    - **false:** The value is displayed in time format (for example, 8:30). This is the default.

- **includePremiums**

Determines whether premiums are eligible to be included in the summary calculation. Specify one of these values:

- **true:** Premiums are eligible to be included in the calculation. This is the default.
- **false:** Premiums are not eligible to be included in the calculation.

The `forceIncludeTimeCodes` and `forceExcludeTimeCodes` parameters take precedence over this parameter on a per time code basis. This lets you make exceptions for specific situations in which some premiums reflect work time while other premiums do not.

For example, you can include most premium records but exclude shift differential records (DIFF) from the Worked total using these settings:

```
forceExcludeTimeCodes='DIFF' includePremiums='true'
```

You can exclude most premium records but include guaranteed time (GUAR) in the Worked total using these settings:

```
forceIncludeTimeCodes='GUAR' includePremiums='false'
```

## Recording more time worked

1. Expand the row of a particular day to view the work details for that day, and click **Add Work**.

Alternatively, you can click the pencil icon in a day's row, and select Elapsed Time from the pop-up window.

To create an additional work detail override based on an existing detail, click the **Copy to New Row** icon. The icon is displayed as an asterisk in the last column of the detail. This control is helpful if most of the data elements from the original detail are the same in the new work detail override. For example, you can record overtime by copying the work detail to a new row and updating the start time, end time, and hour type of the new detail.

If you clicked the **Add Work** button, a new pending work detail with blank values is created.

If you clicked the **Copy to New Row** icon, a new pending work detail with the same values as the original detail is created.

2. Specify this information:

### Start Time

Specify the time the employee started working extra time. For example, if the employee was scheduled to go home at 17:00, but stayed late and worked an extra hour, specify **17:00**.

### End Time

Specify the time the employee stopped working extra time.

### Time Code

Select a time code that classifies how the extent of time was spent.

### Hour Type

Select the hour type that specifies how to pay the employee for their time.

You can assign overtime pay by selecting **OT1** (time and a half), **OT2** (double time), or **OT3** (double time and a half).

#### Note:

The remaining fields are optional. If you leave them blank, the application uses the employee's default labor allocation to determine which job, department, project, docket, or team to charge.

3. Specify values for any field you want to be different from the employee's defaults.
4. Click **Submit** to save the timesheet.

## Recording labor allocation changes

1. Expand the row of a particular day to view the work details for that day.

The inline details are displayed underneath. The rows display the employee's schedule and labor allocation for the day. You can make changes to any values in the row to reflect where the employee spent their time.

Alternatively, you can click the pencil icon in a day's row, and select **Elapsed Time** from the pop-up window.

2. Specify this information:

#### Hours

Specify the number of hours the override lasted.

#### Time Code

Select a time code that classifies how the extent of time was spent.

#### Hour Type

Select the hour type that specifies how to pay the employee for their time.

You can assign overtime pay by selecting **OT1** (time and a half), **OT2** (double time), or **OT3** (double time and a half). This pay rate is only applied to the number of hours that is specified in the **Hours** field.

#### Job

Optionally, select a job to charge the labor towards. Jobs describe the actual function that the employee performs.

#### Department

Optionally, select a department to charge the labor towards.

#### Project

Optionally, select a project to charge the labor towards. Leave blank if you supply a value in the **Docket** field.



### **Docket**

Optionally, select a docket to charge for the labor. Generally, dockets are only used for incentive pay systems to measure employee production quantity. Leave blank unless required.

### **Team**

Select a team to charge the labor towards.

The application adjusts the start and end times to reflect the number you specified in the **Hours** field. For example, to reflect working on a special project for half of an eight-hour shift, specify **4**. The end time becomes four hours after the start time. An additional row is displayed underneath with the remaining hours in the shift. You can adjust the fields in this row, too.

All of the labor metric fields are optional. If you leave them blank, the application uses the employee's default labor allocation to determine which job, department, project, docket, or team to charge. Only the fields for which you supplied a value are changed.

For example, an elapsed time override for two hours is created and a value is supplied only in the **Department** field. In this case, the application allocates two hours of work against the specified department. Any other metrics that are specified in the employee's default labor allocation are used for the remaining metrics, such as the team and project.

3. Click **Submit** to save the timesheet.

## **Applying labor shortcuts to record labor allocation changes**

You can use the Labor Shortcut override to select a defined labor shortcut and apply it to an employee's timesheet. A labor shortcut defines the labor metric fields that are updated when the shortcut is used. For example, a shortcut can be used to change the job, project, department, and docket values of a work detail simultaneously. When used with the Apply Pay Rates Rule, a shortcut can also alter the pay rate for the period covered by the shortcut.

Shortcuts can be applied to an entire day or for a specific set of times on a day.

1. Click the pencil icon in a day's row to apply a labor shortcut to the work details in that day.

To apply a labor shortcut to multiple days, select the check boxes for the applicable days of the week. Then click the pencil icon in the header row.

2. Select **Labor Shortcut** from the pop-up window.

If you do not see the override in the list, ensure the security group permissions for the override are set accordingly.

See [Setting user permissions for overrides](#) on page 11 and [Adding override types to the timesheet](#) on page 17.

3. Specify this information:

**Labor Shortcut**

Select a defined labor shortcut to apply to the timesheet.

See [Expand and Collapse Toggle for All Days](#) on page 26.

See [Creating labor shortcuts](#) on page 27.

**Start Time**

Optionally, specify the start time for a partial day override.

**End Time**

Optionally, specify the end time for a partial day override.

**Override Comment**

Optionally, specify any comments.

4. Click **Submit** to apply the labor shortcut to the timesheet.

## Copying applied overrides

You can copy elapsed time overrides from the timesheet and apply them to another day on the timesheet. using the **Copy** check box. The check box is displayed beside an icon of two sheets of paper.

1. Click **Show Edits**.
2. Select the **Copy** check box next to an override to copy it.
3. Select the check box next to the rows where you want the override copied.
4. Click **Submit** to save the timesheet.

## Deleting applied overrides

You can delete any elapsed time override using the **Delete** check box, displayed as a garbage can icon. Deleting an override undoes the changes that are made to the timesheet.

1. Click **Show Edits**.
2. Select the **Delete** check box next to an override to delete it.
3. Click **Submit** to save the timesheet.

## Chapter 9: Additional overrides

In addition to non-elapsed time and elapsed time overrides, there are several types of overrides you can use to record information on timesheets:

- Retroactive adjustments
- Mass edit overrides
- Retail tip overrides

### Retroactive adjustments

If a discrepancy in pay calculation happens, the application allows for payroll retroactive adjustments to be made. For example, an employee enters incorrect hours in the timesheet before the payroll cutoff. Various payroll-related dates and rules are specified for each pay group to enable organizations to make retroactive adjustments to employee pay.

See “Payroll Settings” in the *Implementation and Administration Guide*.

When payroll changes are required, a user with the required security permissions can return to any pay period to make adjustments unless the timesheet has been locked by the pay period's hands off date, a payroll setting that prevents any changes to a timesheet. These changes are carried forward, so that all business rules are adhered to and employees receive the correct amount of pay in the next pay cycle through adjustment records. Adjustment records represent the difference between what was paid and what was supposed to be paid.

### Recording retroactive adjustments

1. Modify the timesheet to reflect the correct time the employee worked.

See [Chapter 7: Schedule changes](#) on page 54 and [Chapter 8: Worked time changes](#) on page 61.

2. Click **Submit** to save the timesheet.

### Viewing retroactive adjustments

1. Click a date link in the Detail column to view the work details for that day.

The **Work Details** window is displayed.

2. From the View drop-down list, select **Retro Adjustments**.

You can use the **Prev** and **Next** buttons to browse through the days.

## Mass edit overrides

Mass edit overrides are used to make multiple changes to a set of employee timesheets for a set of dates all at once. For example, you can use a mass edit to schedule every employee for a weekend meeting.

### Creating mass edit overrides

1. Select **Maintenance > Mass Edit > Mass Edit Creation**.
2. In the Mass Edit Details section, specify a name in the **Mass Edit Name** field and a brief description in the **Mass Edit Description** field.
3. In the Select Edits section, select the type of override from the drop-down list.
4. Specify the appropriate information in the pop-up window. The required information varies depending on the type of override that was selected.
5. Click **Submit**. The mass edit is displayed in the Select Edits section.
6. In the Select Employees section, select which employees, teams, calculation groups, pay groups, and shifts receive the mass edit.

#### Note:

The maximum number of employees you can create mass edits for in one transaction is displayed in the header of the Select Employees section. System administrators can alter this number.

7. In the Select Dates section, select the repetition of the mass edit from the **Frequency** drop-down list:

- **Once Only:** Specify the only date the overrides are applied in the **Start Date** field.
- **Daily:** Specify the start and end dates during which to apply the mass edit in the **Start Date** and **End Date** fields.

Specify how often to apply the mass edit within the date range in the **Repeats** field. For example, a value of **2** applies the mass edits every other day within the date range.

Specify the maximum number of days to apply the mass edit in the **End after** field.

- **Weekly:** Specify the start and end dates during which to apply the mass edit in the **Start Date** and **End Date** fields.

Specify how often to apply the mass edit within the date range in the **Repeats** field. For example, a value of **2** applies the mass edits every other week within the date range.

Specify the maximum number of days to apply the mass edit in the **End after** field.

Select check boxes of the days of the week for which you want the mass edit to apply.

- **Monthly:** Specify the start and end dates during which to apply the mass edit in the **Start Date** and **End Date** fields.

Specify how often to apply the mass edit within the date range in the **Repeats** field. For example, a value of **2** applies the mass edits every other month within the date range.

Specify the maximum number of days to apply the mass edit in the **End after** field.

Select one of these options:

- **Day ... from the ... of the month:** Specifies a specific day within a month that is relative to the start or end date from which to apply the mass edit. Specify a whole number in the field and select either **start** or **end** from the drop-down list. The mass edit is applied the specified number of days. If **start** is selected, the number of days is counted forward from the start date. If **end** is selected, the number of days is counted backward from the end date. For example, if you specify **2** and select **start**, the mass edit will be applied two days after the specified start date.
- **the ... .. of the month:** Selects a specific day within the month. Specify the specific day within the month using the two drop-down lists.

**Note:**

System administrators set the maximum number of days for which you can create mass edits in one transaction. The maximum is displayed in the header of the Select Dates section.

8. Click **Submit**. The **Mass Edits Results** page is displayed showing the mass edit with a status of Pending. All mass edits are pending until enabled.

## Enabling and disabling mass edits

Mass edits only create their defined overrides when they are enabled.

1. Select **Maintenance > Mass Edit > Mass Edit History**.
2. Select the check box next to the mass edit's name you want to enable or disable.
3. Enable or disable the mass edit:
  - Click **Enable** to apply the override to the appropriate groups as defined in the mass edit record.
  - Click **Undo** to disable the mass edit. The override is removed from the affected groups as defined in the mass edit record.

## Retail tip overrides

The Retail Tip override lets employees specify tip details for a shift. Employees can record the amount of cash tips, the amount of credit tips, and any other tip amounts. They can also "tip out" a certain amount, which means it gets distributed as indirect tips to other employees.

## Recording tips received during a shift

1. Click the pencil icon in a day's row to record tips received during a shift.
2. Select **Retail Tip** from the pop-up window.

If you do not see the override in the list, ensure the security group permissions for the override are set accordingly.

See [Setting user permissions for overrides](#) on page 11 and [Adding override types to the timesheet](#) on page 17.

3. Specify this information:

### **Inferred**

Select the check box to calculate tips as a percentage of total sales.

### **Cash Tips**

Specify the amount of cash tips.

### **Credit Tips**

Specify the amount of credit tips.

### **Other Tips**

Specify the amount of any other tips.

### **Tip Out**

Specify the amount of tips to distribute as indirect tips to other employees working the shift.

### **Sale**

Specify the amount of total sales during the shift.

### **Start Time Date**

Specify the date of the shift during which the tips were received.

### **Override Comment**

Specify any comments.

4. Click **Submit** to save the override.

## Chapter 10: Processing timesheets

Beyond applying overrides to a Daily Timesheet, there are several tasks that employees and supervisors can perform while processing timesheets:

- Adding comments
- Reading comments
- Adding clock entries
- Editing clock entries
- Saving timesheets
- Submitting timesheets
- Authorizing timesheets
- Locking timesheets to prevent any changes being made

### Adding comments to timesheets

1. Click the comment icon on any row in the timesheet.
2. Specify the comment in the **Add Comment** window, and click **OK**. A comment icon that is highlighted in blue is displayed on any timesheet row with a comment.
3. Click **Submit** to save the timesheet.

### Reading comments on timesheets

To read a comment on a timesheet, click any comment icon that is highlighted in blue.

### Adding clock on and off times manually

The application can capture on and off times using clocks, either through biometric readers such as hand or thumb print scanners or with badges that employees swipe. If the application is set up to use clock readers, employee timesheets are populated with these clock on and off times.

You can also manually add clock on and off times on the Daily Timesheet.

1. Click the plus icon in the Clocks column to add clock entries.
2. To specify a clock on time, specify a time in the **Time** field.
3. Select **ON** from the **Type** drop-down list.

If you are using the ON/OFF clock sequence, the ON preset is selected by default for the first clock on a day.

4. Click **Add** to add the clock on time.

5. To specify a clock off time, specify a new time in the **Time** field.

6. Select **OFF** from the **Type** drop-down list.

If you are using the ON/OFF clock sequence, the OFF preset is selected by default after an ON clock.

7. Click **Add** to add the clock off time.

8. Click **Submit** to save the timesheet.

## Adding additional clock entries

You can use the ON and OFF clocks to record clock on and off times. This accommodates an employee clocking on at the start of the day, clocking off at the start of lunch, clocking on again at the end of lunch, and clocking off at the end of the day.

You can also record non-ON/OFF clocks to capture labor-related information such as departments or projects.

1. Click the plus icon in the Clocks columns to add additional clock entries.

2. Specify this information:

### Time

Specify the time of the clock. For example, **9:00a** or **5:00p**.

### Type

Select the clock preset. The default value is determined by the default clock sequence that is defined.

See [Adding Labor Metric Selection Lists to the Add New Clock Widget](#) on page 22.

If the clock preset contains associated data, the **Data** field is populated automatically.

See [Creating clock presets](#) on page 20.

### Date

Optionally, change the date of the clock, if necessary.

### Labor Metrics

Optionally, select one or more labor metric values, if necessary. See [Adding Labor Metric Selection Lists to the Add New Clock Widget](#) on page 22.

### Data

Optionally, specify the clock data string. For example, TCODE=BRK. If the field already contains a data string, you can modify or remove it, as required.

3. Click **Add** to add the clock entry.

4. Click **Submit** to save the timesheet.



## Editing clock entries

1. In the Clocks column, expand the clock string to show all applied clocks by clicking the >> indicator, if necessary.

See [Hiding non-ON/OFF clocks by default](#) on page 25.

2. Click a clock entry in the Clocks column to edit it.
3. Modify the time of the clock entry, or make any other changes in the pop-up.

The employee's physical clock on and clock off times are preserved.

4. Click **Submit** to save the changes.

## Bypassing payroll rules

When adding clock entries in the timesheet, you can bypass all the payroll rules that are usually applied to the employee's time. For example, you can create a clock override so the employee works 18 hours on Tuesday. If you select the check box in the Manual column, the overtime rule will not be applied to the employee.

### Note:

If employees have more than one rule assigned to them, none of the rules will be applied for the override.

1. Click the plus icon in a day's row, and add the clock entries in the pop-up window.
2. To bypass the payroll rules, select the check box in the Manual column. No payroll rules are applied to any timesheet row with a selected check box in the Manual column.
3. Click **Submit** to save the timesheet.

## Submitting timesheets

After you complete entering any overrides, you submit your timesheet for approval.

To submit a timesheet, ensure the timesheet accurately reflects the times you worked, and click **Submit**.

## Authorizing timesheets

In many organizations, some or all days of an employee's timesheets may require authorization by a supervisor (or other qualified user role). If work detail approval is enabled, you must have sufficient permission to approve time charged to the specific teams worked on during that day to approve the entire day (work summary). If work detail approval is not enabled, the teams that employees worked on are not relevant to the authorization of the work summary.

See [Approving time](#) on page 12.

## Authorizing individual records on timesheets

Unauthorized records are displayed with a red X icon. Authorized records are displayed with a green check mark icon.

1. Click the red X icon in a day row to authorize that timesheet record. To authorize multiple records at once, click multiple red X icons.
2. Click **Submit** to authorize the timesheet records with a green check mark icon.

The work summary authorization override is applied to the selected days.

### Note:

When work detail approval is enabled, the work details that you have permission to authorize are also authorized. If all the work details within a day are authorized, the day is authorized. If one or more work details within a day are unauthorized, the day remains unauthorized.

## Authorizing every record on timesheets

If all records are unauthorized a, red X icon is displayed in the top row. If all records are authorized, a green check mark icon is displayed in the top row. If some of the records are unauthorized, both icons are displayed.

1. Click the authorize or unauthorize icon in the top row, and select **Authorize All** from the pop-up window.
2. Click **Submit** to authorize all timesheet records.

The work summary authorization override is applied to all days.

### Note:

When work detail approval is enabled, the work details that you have permission to authorize are also authorized. If all the work details within a day are authorized, the day is authorized. If one or more work details within a day are unauthorized, the day remains unauthorized.

## Authorizing individual work details

When work detail approval is enabled, you can also set the authorization status of individual work details.

### Note:

If work detail approval is not enabled, you can only authorize the day at the work summary level. Check boxes to set the authorization status of individual work details are not displayed.

1. Expand the row of a particular day to view the work details for that day.
2. In the Authorized column, select the check box of each work detail that you want to authorize.

3. To set the authorization status of an individual work detail, you must have sufficient permission to approve time charged to the specific team. If you do not have permission to authorize a work detail, the team is not displayed in the **Team** field.
4. Click **Submit** to authorize the individual work details.
5. If all the work details within a day are authorized, the day is authorized. If one or more work details within a day are unauthorized, the day remains unauthorized.

## Authorizing multiple timesheets

Supervisors can authorize multiple timesheets at one time through the My Approval menu option. There are three default approval worksheets for approving timesheets:

- Supervisor Summary
- Pay Period Summary
- Supervisor Approval Worksheet

These worksheets let you view several timesheets on one page and authorize some, or all, of the timesheets. You select which timesheets to populate the worksheet the first time you select the **My Approval** option.

1. Select **My Approval**.

### Note:

If you have not used the **My Approval** menu option before, you might be required to select the timesheets to include on your worksheet.

2. Select the timesheets to authorize:
  - On the Supervisor Summary, click **Authorize All Submitted** or **Authorize All Un-Submitted**.
  - On the Pay Period Summary, select the **Authorize All** check box at the bottom of the page.
  - On the Supervisor Approval Worksheet, click the red X icon to authorize the corresponding record.
  - To authorize all records for an employee, click the authorize or unauthorize icon in the Summary column for that employee. Then select **Authorize All** from the pop-up menu.
  - To authorize all records for all employees, click the authorize or unauthorize icon in the Summary column of the Total row at the bottom. Then select **Authorize All** from the pop-up window.
3. Click **Submit** to authorize the timesheets.

The work summary authorization override is applied to the selected timesheets.

**Note:**

When work detail approval is enabled, the work details that you have permission to authorize are also authorized. If all the work details within a day are authorized, the day is authorized. If one or more work details within a day are unauthorized, the day remains unauthorized.

## Unauthorized timesheets

Users with the appropriate access can unauthorize Daily Timesheets. Authorized records are displayed with a green check mark icon. Unauthorized records are displayed with a red X icon.

1. Click the green check mark icon in a day row to unauthorize that timesheet record. To unauthorize multiple records at once, click multiple green check mark icons.
2. Click **Submit** to unauthorize the timesheet records with a red X icon.

The work summary authorization override is applied to the selected days.

**Note:**

When work detail approval is enabled, the work details that you have permission to authorize are also unauthorized.

## Locking timesheets

You can prevent users from making changes to timesheet records by creating a timesheet lock for a range of dates.

### Creating timesheet locks

1. Click the unlocked lock icon in a timesheet record.
2. Click **Submit** to save the timesheet.

The application adds the timesheet lock for the specified dates. On the locked days, users cannot edit any of the work details or apply overrides.

### Viewing timesheet locks

1. Select **Maintenance > Employees > Employee**.
2. Click **Edit** beside an employee. All the timesheet locks for the selected employee are displayed in the Time Sheet Locks section.

**Note:**

To view the Time Sheet Locks section, you require access to the TIME SHEET LOCKS maintenance form.

See “Assigning form-level permissions” in the *Implementation and Administration Guide*.

## Removing timesheet locks

1. Click the locked lock icon in a timesheet record.
2. Click **Submit** to save the timesheet.

# Chapter 11: Rule Tracer

This chapter describes how to use the Rule Tracer. You can use the Rule Tracer as a diagnostic tool to examine the effects of payroll rules on a variety of data.

The Rule Tracer shows which rule (and which condition set of each rule) was executed for any employee, on any day. The Rule Tracer also provides a before and after snapshot of relevant data, so that the exact effect of the rules can be traced. Any records that have been modified, deleted, or added are highlighted in these snapshots.

## Configuration

This section describes the configuration steps for the Rule Tracer. By default, the Rule Tracer is enabled.

### Granting permissions to run the Rule Tracer

Only users with appropriate security permissions can run the Rule Tracer. By default, users in the System Administrators security group can run the Rule Tracer.

1. Select **Timesheet**.
2. Click the **Turn ON config mode** icon.
3. Select any employee's timesheet using the **Timesheet Selection** page, and click **Load**.
4. Click the lock icon next to the Trace column title.
5. Select the security group to which you want to grant permissions from the **Security Group** drop-down list.
6. Select **Act** from the **Permission Flag** drop-down list.
7. Click **Save** and close the window.
8. Click the **Turn OFF config mode** icon.

### Disabling the Rule Tracer

The Rule Tracer is primarily intended as an aid for configuring payroll rules. Access to the Rule Tracer can be managed in two ways. First, system administrators can limit access to the tracer using security group permissions.

See [Granting permissions to run the Rule Tracer](#) on page 78.

Second, you can remove the Rule Tracer from the application entirely if it is no longer required. You can return access to the Rule Tracer to the application at any point.

See [Enabling the Rule Tracer](#) on page 79.

1. Select **Maintenance > System Administration > Registry Maintenance**.

2. Select the **system > provisioning > DTS\_POINT > providers > ruleTracer** registry path.
3. Click **Edit**.
4. Delete the text in the **Variable Value** field.
5. Click **Save**.

### Enabling the Rule Tracer

The Rule Tracer is enabled and disabled using a registry parameter.

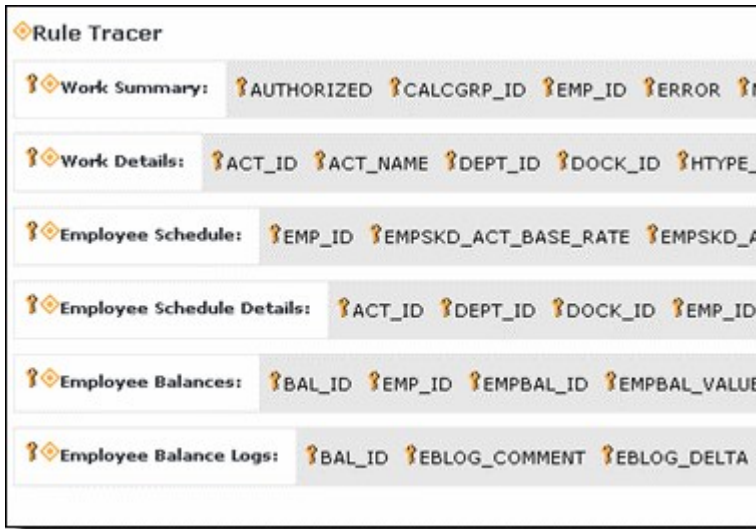
1. Select **Maintenance > System Administration > Registry Maintenance**.
2. Select the **system > provisioning > DTS\_POINT > providers > ruleTracer** registry path.
3. Click **Edit**.
4. Specify **class:com.workbrain.app.jsp.provision.ts.ruletracer.RuleTracer** in the **Variable Value** field.
5. Click **Save**.

### Hiding sections of output

The Rule Tracer shows several sections of calculation-related data, such as work details and employee schedules, in a pop-up. You can hide any of the sections, as required, by setting the security permissions to deny for the appropriate security groups.

See “System Security” in the *Implementation and Administration Guide*.

1. Select **Timesheet**.
2. Click the **Turn ON config mode** icon.
3. Select any employee’s timesheet using the **Timesheet Selection** page, and click **Load**.
4. Click the **Trace** link on any record.



The Rule Tracer window is displayed. The sections that you can hide are listed at the left.

5. Click the security (key) icon next to the section you want to hide.

**Note:**

You can also hide individual columns within a section. To do so, click the key icon next to the column's name. For example, to hide the Docket column of the Work Details section, click the key icon next to DOCK\_ID.

6. Select the security group to which you want to hide sections of output from the **Security Group** drop-down list.
7. Select Deny from the **Permission Flag** drop-down list.
8. Click **Save** and close the window.
9. Click the **Turn OFF config mode** icon.

## Execution

This section describes how to use the Rule Tracer and interpret the results.

### Running the Rule Tracer

The Rule Tracer is run from the Daily Timesheet for a specific employee on a specific date. The Rule Tracer examines every rule that is applied to the employee's calculation group, determines which rules are executed, and shows the results of the rules.

To run the Rule Tracer, click the Trace link on the record you want to examine.



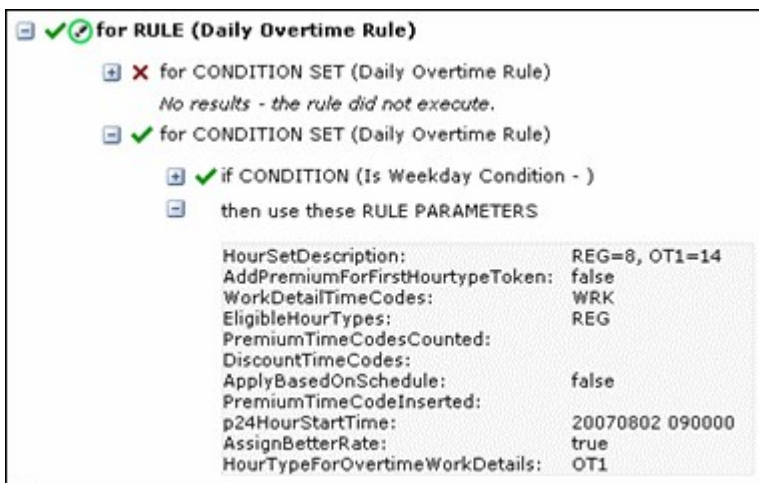
The Rule Tracer window is displayed with the results of the trace.



## Browsing the results of the Rule Tracer

The Rule Tracer shows the trace information organized in a list of rules. Each rule is an expandable tree. Click the + icon next to a rule to display additional details. The rule's condition sets, conditions, and rule parameters are displayed under each rule in this hierarchy:

- Under each rule is a list of the rule's different condition sets.
- Under each condition set is a list of the set's conditions and the rule parameters that are used if the condition set evaluates to true.
- Under each condition is the condition's parameters.



These icons are used in the trace information:

- Rules, condition sets, and conditions that were executed are marked with a green check mark.
- Rules, condition sets, and conditions that were not executed are marked with a red X.

The results, displayed under each rule, provide a before and after snapshot of calculation data that is affected by the rule. By default, the Rule Tracer shows any changes to Work Summary, Work Details, Work Premiums, Employee Schedules, Employee Schedule Details, Employee Balances, and Employee Balance Logs data. The Rule Tracer also shows any exceptions caused by the rule.

the RESULTS are

- Work Summary
- Work Details
  - Before rule execution:
 

ACT_ID	ACT_NAME	DEPT_ID	DOCK_ID	HTYPE_ID	JOB_ID
-1000		50165	50207	50132	60023
-1000		50165	50207	50131	60023
-1000		50165	50207	50132	60023
  - After rule execution:
 

ACT_ID	ACT_NAME	DEPT_ID	DOCK_ID	HTYPE_ID	JOB_ID
-1000		50165	50207	50132	60023
-1000		50165	50207	50134	60023
-1000		50165	50207	50132	60023
-1000		50165	50207	50131	60023
-1000		50165	50207	50132	60023
- Employee Schedule
- Employee Schedule Details
- Employee Balances
- Employee Balance Logs

If the rule has not run, **No results - the rule did not execute** is displayed.

Within each section of calculation data, these colored highlights are used:

- Blue indicates the record was changed by the rule.
- Green (in the after snapshot) indicates the record was added by the rule.
- Red (in the before snapshot) indicates the record was deleted by the rule.

# Glossary

## **accrual**

A rule that defines when and by how much an employee balance changes. The rule can define criteria such as minimum and maximum attendance and absence time codes and seniority ranges.

## **authorize**

Supervisor approval of an employee's timesheet.

## **balance**

A counter that is stored in a particular number of units (hours, minutes, days, or weeks). Some examples of balances are Vacation, Sick Day, and Personal Days.

## **calculation group (calc group)**

A group of employees who are subject to the same business or payroll rules. Calculation groups allow the same calculations to be efficiently applied to a set of employees.

## **department**

A grouping of employees. Used as a labor metric.

## **docket**

Used for incentive pay systems (std qty, std time, machine). A labor metric.

## **Hands Off Date**

The cut-off date for the creation of retroactive adjustment records. If a user makes changes to a record before the Hands Off Date, the system will not create retroactive adjustment records.

## **hour type**

Hour types are used to classify the pay category and the multiple that should be applied to a time period. Multiples are the factor by which the base rate is multiplied.

## **job**

The function that is performed by an employee during a scheduled shift. Used as a labor metric.

## **override**

A change that is made by a user to reflect new conditions. Changing an employee's schedule, marking days off for vacation, or changing an employee's work assignment are all overrides.

**overtime**

By company policy or law, employees should be paid overtime after completing a normal workweek or when required to work under extenuating circumstances. In most cases, employees are paid overtime at 150% of their normal pay rate.

**parameter**

An adjustable setting that is used to define the way certain parts of the application are displayed. For example, display colors or form behavior such as the maximum number of lines in a report.

**pay period**

A span of days for which employees are paid.

**pay rate**

The hourly rate that an employee should be paid. There are numerous methods that are used to determine this rate.

**payroll rules**

Sometimes called business rules, these are often specific and must be applied consistently across a client's organization. They might include mathematical computations that are applied under certain circumstances.

**premium**

A premium is a sum of money that is added to an employee's hourly pay rate under certain conditions.

**project**

An alphanumeric value to identify the specific project against which time is to be charged.

**shift**

Scheduled time frame in which an employee is expected to work.

**team**

A group of employees that is used to determine security permissions in the application. The initial setup of the Team Security model (creating users, employees, roles, and teams) must be performed through the application. The management of Team Security users, employees, and teams can be performed using the Security Editor.

**time code**

A code that is used to record the activities an employee performs during scheduled work hours. Time codes are also used to record reasons an absence occurred. For example, VAC for vacation, HOL for holiday, or SICK for time off due to illness.

**work details**

An employee's daily work detail information, including timesheet balances, original clock entries, and any retroactive adjustments.