

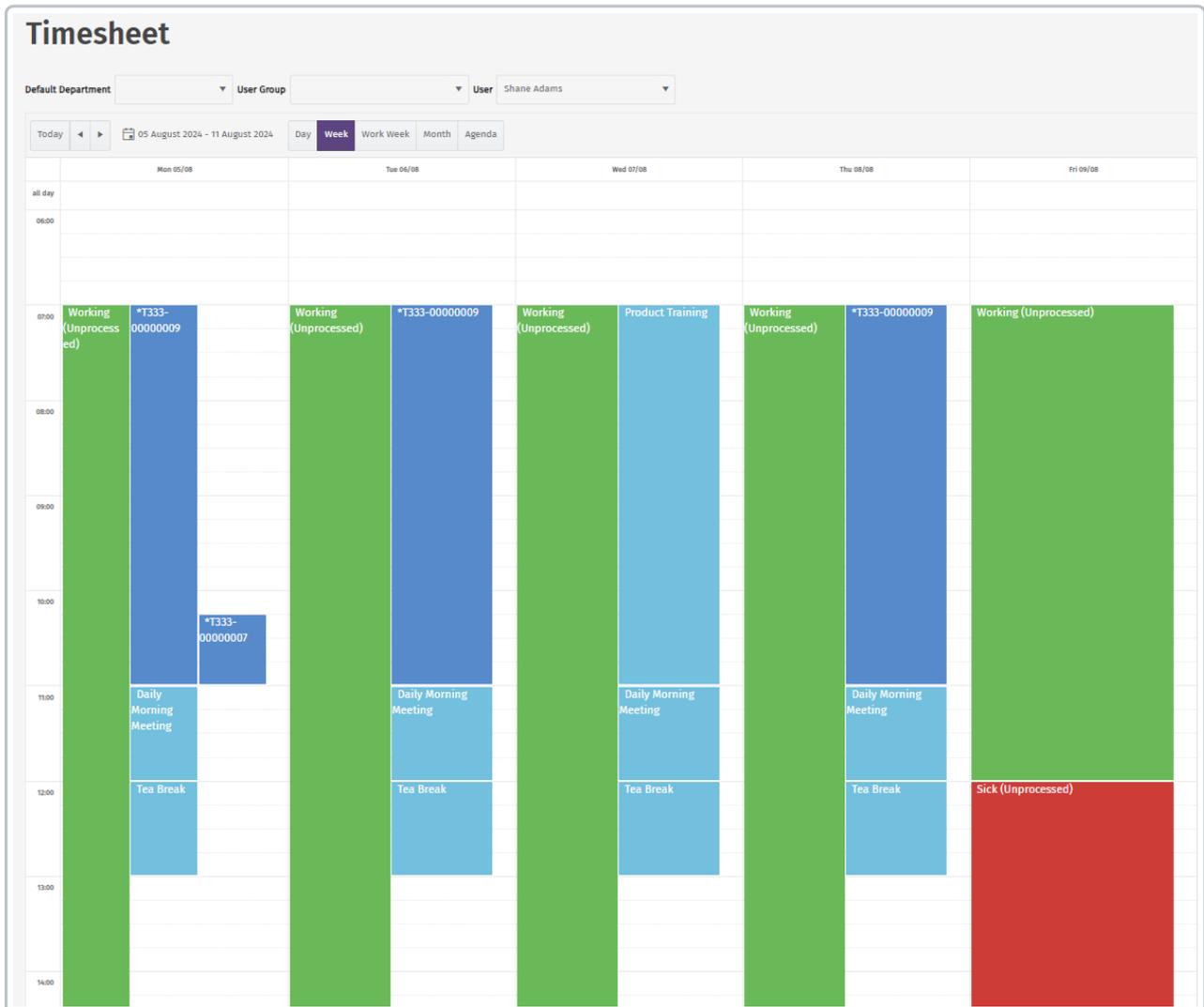
Timesheet

15/08/2024 2:58 pm BST

Timesheets track a user's attendance and absence, including clock-in and clock-out times, pay hours, and direct and indirect activities.

Access Timesheet

Navigate to the **Timesheets** page and select a user to display their timesheet.



Sections of the time sheet are:

- **User selection:** This allows you to select which user's timesheet to administer.
 - By default, it loads your own timesheet.
 - If you are a manager of other users, you can search for another user's timesheet using the search boxes. You can narrow down the search for a user by specifying a Default Department and User Group. Alternatively, you could search for a user.
- **Logged hours:** A user's logged time is colour-coded:
 - **Attendance/Absence:** The colour of attendance logs is determined by the attendance type (which defaults to green for working hours and red/orange for absence). You need an attendance log to create direct and indirect activities.

- **Direct Activity:** Direct activities booked onto jobs are shown in dark blue.
- **Indirect Activity:** Indirect activities such as breaks are shown in light blue.
- **Pay:** Shows any pay entitlement calculated by the pay rules (see image below). For more information, see [Pay Rules](#).
- **Exceptions:** Shows the pay and attendance rules that were violated. The record will not be automatically approved. For example, if you left early, or did not clock out. Exceptions can be created manually.

Pay			Exceptions		
Shift Start	Rate	Hours	Shift Start	Exception	Comment
06-May 7:00	x1	10	06-May 7:00	Early Clock Out	Shift end 06/05/2024 17:30:00, Clock out 06/05/2024 17:29:52

Timesheet Administration

Typically, attendance and activity records are collected in real time, but you can also retrospectively manually add/edit records.

Timesheet menus

Users can interact with their timesheet through menus that can be displayed by right-clicking one of the following:

- A - A highlighted time period
- B - An attendance log
- C - An activity log

Timesheet

Default Department User Group User Shane Adams

Today 29 July 2024 - 04 August 2024 Day **Week** Work Week Month Agenda

	Mon 29/07	Tue 30/07	Wed 31/07	Thu 01/08
all day				
06:00				
07:00	A →			
08:00	B →			
09:00	Working (Unprocessed)	BuggyActivity		
10:00		C →		
11:00				

Menu A:

- Add Attendance
- Add Direct Activity
- Add Indirect Activity
- Add Absence

Menu B:

- Add Attendance
- Add Direct Activity
- Add Indirect Activity
- Add Absence
- Edit
- Delete
- Split
- Attendance Revision
- Merge
- Copy

Menu C:

- Add Attendance
- Add Direct Activity
- Add Indirect Activity
- Add Absence
- Edit
- Delete
- Split
- Activity Revision
- Copy
- Snap to Attendance Start
- Snap to Attendance End
- Snap to Previous Activity
- Snap to Next Activity

To assign time to an attendance, activity or absence, click and drag the mouse on the required day and for the required time. Position the mouse over the highlighted time range and right-click to display the menu shown below. Alternatively, right-click an attendance, activity or absence to display menu items specific to your selection.

Common add new logs menu items (A, B, C)

The following menu items are displayed in each drop down menu A, B and C in the image above:

- Add Attendance
- Add Direct Activity
- Add Indirect Activity
- Add Absence

Add Attendance

The following properties can be defined for the **Add Attendance Log** input screen:

Blue fields in the form are required and are flagged with an asterisk () in this document.*

Mode: The Mode can be:

- **Single Shift:** Creates one attendance log.
- **Multi Shift:** Creates multiple attendance logs over a sequence of days. For example, if you want to record an absence over four days, the *Multi Shift* mode lets you record it all at once rather than four times; one for each day.

The input screen fields differ depending on the mode you choose.

Single Shift mode fields:

Attendance Type*: Select the **Attendance Type**. For more information, see [Attendance Types](#).

Shift*: Select a shift. For more information, see [Add Shifts to a Work Pattern](#).

Clock In*: Clock-in time.

Clock Out: Clock-out time.

Team*: Select the team you worked on.

Comments: Any comments relevant to the timesheet entry.

Multi Shift mode fields:

Attendance Type*: For more information, see [Attendance Types](#).

WorkPattern*: Select the Work Pattern. For more information, see [Shifts and Work Patterns](#).

Time Window Start*: The start time for the attendance/absence.

Time Window End*: The end time for the attendance/absence.

Team*: Select the team you worked on.

Comments: Any comments relevant to the timesheet entry.

Preview window: A display of the multiple attendances.

Add Direct Activity

Direct Activity is the labour time which is booked against a scheduled job.

The following properties can be defined for the **Add Direct Activity** input screen:

Blue fields in the form are required and are flagged with an asterisk () in this document.*

Search: The **Select Item** drop down limits items to just those that contain the search term.

Select Item*: Select the item that the direct activity applies to.

Job*: Select the job.

Visited Operation: Select the operation.

Activity*: Select the activity that was performed.

Visit: Select the visit.

Work Centre: The work centre the visit is assigned to.

From Date: The start date and time of the direct activity.

To Date: The end date and time of the direct activity.

Comments: Add a comment.

Add Indirect Activity

An indirect activity is the labour time which is booked to an activity that is not associated with a job or works order. This is typically used to track non-productive time like training, meetings, etc.

Activity*: Select the indirect activity.

From Date*: The start date and time of the indirect activity.

To Date: The end date and time of the indirect activity.

Comments: Add a comment.

Add Absence

Logs a period of absence.

Mode: The Mode can be:

- **Single Shift:** Creates one attendance log.
- **Multi Shift:** Creates multiple absences over a sequence of days. For example, if you want to record an absence over four days, the Multi Shift mode lets you record it all at once rather than four times; one for each day.

The input screen fields differ depending on the mode you choose.

Single Shift

Absence Start: The date and time the absence started.

Absence End: The date and time the absence ended.

Absence Type: The type of absence. Examples of values are: *Sick, Holiday, Bradford Unauthorised*.

Work Pattern: Select the Work Pattern.

The table below is displayed at the bottom of the **Add Absence** input screen and shows the Day, Hours and Shift information about the absence.

Day	Hours	Shift
12/06/2024	1.5	24 hour/24 Hours

Page 1 of 1 10 items per page 1 - 1 of 1 items

Multi Shift

Absence Start Day: The day the absence started.

Absence End Day: The day the absence ended.

Absence Type: The type of absence. Examples of values are: *Sick*, *Holiday*, *Bradford Unauthorised*.

Work Pattern: Select the Work Pattern.

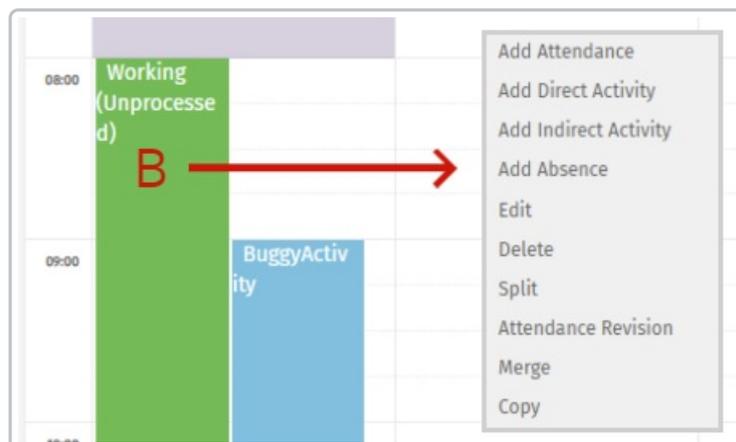
The table below is displayed at the bottom of the **Add Absence** input screen and shows the Day, Hours and Shift information about each absence.

Day	Hours	Shift
10/06/2024	23.5	24 hour/24 Hours
11/06/2024	23.5	24 hour/24 Hours

Page 1 of 1 10 items per page 1 - 2 of 2 items

Editing attendance/absence menu items (B)

Right-click the attendance/absence entry to display the menu item.



Each of the following menu items are discussed in more detail below:

- Add Attendance
- Add Direct Activity
- Add Indirect Activity
- Add Absence
- Edit
- Delete
- Split
- Attendance Revision
- Merge
- Copy

Add Attendance

Refer to [Common Timesheet Menu Items](#) above.

Add Direct Activity

Refer to [Common Timesheet Menu Items](#) above.

Add Indirect Activity

Refer to [Common Timesheet Menu Items](#) above.

Add Absence

Refer to [Common Timesheet Menu Items](#) above.

Edit

Select **Edit** to display the **Edit Attendance Log** input screen.

The following properties can be defined for the **Edit Attendance Log** input screen:

Blue fields in the form are required and are flagged with an asterisk () in this document.*

Attendance Type: Select an attendance type. For more information, see [Attendance Types](#).

Clock In*: Clock-in time.

Clock Out: Clock-out time.

Team*: Select the team you worked on.

Shift*: Select a shift. For more information, see [Add Shifts to a Work Pattern](#).

Paid Hours: Shows the number of hours that are paid.

Unpaid Hours: Shows the number of hours that are unpaid.

Comments: Add a comment.

Status: The approval process goes through several stages. It is initially set to *Unprocessed* before being processed by an event which applies the pay and attendance rules that you've created (explore [Pay Rules](#)). The record will then be set to *Auto Approved* (not visible in the **Status** field when editing manually) or *Unapproved*.

When you make an edit, you may want to reapply the pay and attendance rules. To do this, you will set the status to *Unprocessed* so that the record can be reprocessed.

The statuses are:

- **Auto Approved:** Records that have been automatically approved based on your pay and attendance approval rules. This status is not visible when editing manually.
- **Unprocessed:** Records that have not been processed for pay and attendance approval rules.
- **Ignored:** Ignored record.
- **Unapproved:** Records that require manual approval.
- **User Approved:** A user manually approved the record.

Delete

You can delete an attendance log. You can't delete an attendance log that has an activity unless the **Delete Associated Activity** checkbox is checked.

Split

You can split an attendance log if, for example, you had to leave work for a personal appointment. This menu item is only visible when right-clicking time that **is not** in an **Active** status.

End

This menu item is only visible when right-clicking time that **is** in an **Active** status.

Select **End** to display the **End Attendance Log** popup. Click **OK** to end the selected attendance log.

Attendance Revision

The **Attendance Log Revision** popup shows the history of edits to the selected attendance log.

Merge

You can merge two attendance logs.

Copy and Paste

You can copy an attendance log which can be pasted with or without its activities.

Editing activity menu items (C)

Right-click the activity to display the menu items.



Each of the following menu items are discussed in more detail below:

- Add Attendance
- Add Direct Activity
- Add Indirect Activity
- Add Absence
- Edit

- Delete
- Split
- Activity Revision
- Copy
- Snap to Attendance Start
- Snap to Attendance End
- Snap to Previous Activity
- Snap to Next Activity

Add Attendance

Refer to [Common Timesheet Menu Items](#) above.

Add Direct Activity

Refer to [Common Timesheet Menu Items](#) above.

Add Indirect Activity

Refer to [Common Timesheet Menu Items](#) above.

Add Absence

Refer to [Common Timesheet Menu Items](#) above.

Edit

Select **Edit** to display the input screen of the activity. This could be **Edit Direct Activity Log** or **Edit Indirect Activity Log** input screens depending on the type of activity you are editing.

Edit Direct Activity Log

The following properties can be defined for the **Edit Direct Activity Log** input screen:

Blue fields in the form are required and are flagged with an asterisk () in this document.*

Item: The item related to the direct activity.

Job: The job related to the direct activity.

Operation: The operation related to the direct activity.

Activity: The activity related to the direct activity.

Work Centre: The work centre where the direct activity is performed.

From Date*: The start date and time of the direct activity.

To Date: The end date and time of the direct activity.

Comments: Add a comment.

Edit Indirect Activity Log

The following properties can be defined for the **Edit Indirect Activity Log** input screen:

Blue fields in the form are required and are flagged with an asterisk () in this document.*

Activity: The activity related to the indirect activity.

From Date*: The start date and time of the indirect activity.

To Date: The end date and time the indirect activity.

Comments: Add a comment.

Delete

Delete an activity log.

Split

You can split an activity if, for example, you took a break during the activity.

Activity Revision

The **Activity Log Revision** popup shows the history of edits to the selected activity log.

Copy and Paste

You can copy and paste an activity.

Snap to Attendance Start

Start the activity at the start of the attendance.

Snap to Attendance End

End the activity at the end of the attendance.

Snap to Previous Activity

Start the activity at the end of the previous activity.

Snap to Next Activity

End the activity at the start of the next activity.
