

Timesheet Training

Modified on: Thu, 15 Oct, 2020 at 1:24 PM

Brief description:

This Quick Topic provides an overview of creating, editing and submitting a timesheet. A description of the approval process and timesheet statuses is also provided.

What's covered in this document:

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Create a Timesheet

Create a new timesheet with each new time period.

To create a timesheet, navigate to **Time > Dashboard** or **Time > List** and click **+Timesheet** (upper right corner above grid).

*Note: The grid for Active Timesheets will appear the same on both the **Time > List** and **Unanet Home Dashboard** pages.*

A new timesheet can also be created from the **Home Dashboard** (click Unanet logo at upper left corner of screen). Scroll down to **Active Timesheets** and click **+Timesheet** (upper right corner above grid).

(Time > Dashboard)

Time – Dashboard 						
Active Timesheets						 Timesheet
	TIME PERIOD	HOURS	STATUS		CONTROLLER	
 	8/1/2019 — 8/15/2019	32	INUSE	8/7/2019 10:09 AM	Frank T. Controller (fcontroller)	
  	7/16/2019 — 7/31/2019	96	SUBMITTED (Adjustments)	8/13/2019 3:07 PM	Chris S. Director (cdirector)	

(Time > List and Unanet Home Dashboard)

Active Timesheets						 Timesheet
	TIME PERIOD	HOURS	STATUS		CONTROLLER	
 	8/1/2019 — 8/15/2019	32	INUSE	8/7/2019 10:09 AM	Frank T. Controller (fcontroller)	
  	7/16/2019 — 7/31/2019	96	SUBMITTED (Adjustments)	8/13/2019 3:07 PM	Chris S. Director (cdirector)	

On the resulting screen, enter a date that falls within the time period you wish to create. The DATE field is populated by default with the current date. If necessary, use the calendar icon to change the date.

Click **Save**.

Time – Create Timesheet

CREATE A NEW TIMESHEET

DATE:

Create a new timesheet for the time period containing this date.

Save

Timesheet Data Entry

Timesheet features related to data entry include the following:

- Dropdown menus are available for regular user fields (these fields are configurable by your Administrator).
- Each field will adjust in size according to the length of the values selected to optimize the overall display based on your screen size and resolution.
- If a field is required and has a default value defined in the system, it will default automatically. (EX: LABOR CATEGORY, LOCATION, PROJECT TYPE, etc.)
- If a field is not required and has no default value defined in the system, the default display will be blank.

PROJECT	TASK	LABOR CATEGORY	LOCATION	PROJECT TYPE	PAY CODE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	TOTALS
<input type="text"/>																					
Totals:																					

The PROJECT column contains projects that are active and available for the user to charge time against.

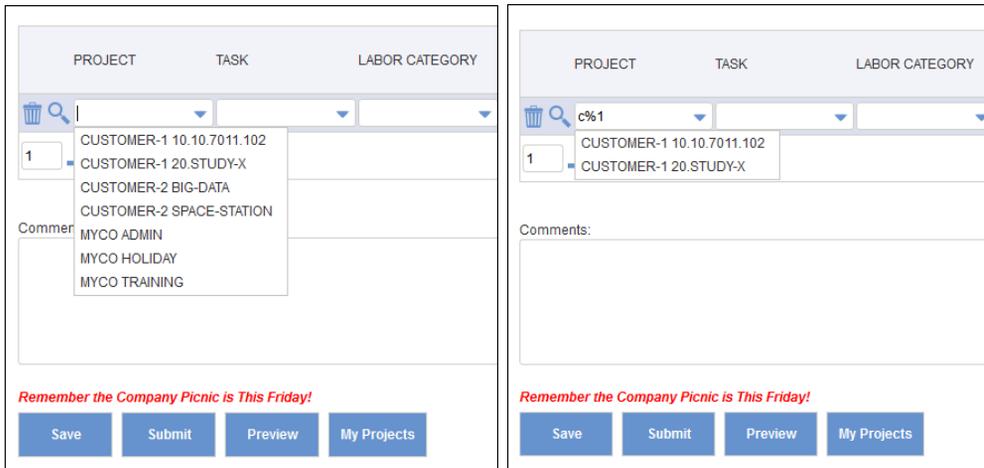
The TASK column contains tasks associated with the selected project that are active and available for the user to charge time against.

For each project row, enter time in the proper day/date to the right. Additional rows associated to various projects or other elements within the dropdown menus can be added to the timesheet by specifying the number of rows to insert and clicking on the **add row icon** at the bottom left of the timesheet.

Searching and Filtering

Search rules for timesheets are the same as used throughout Unanet.

- **Wildcards**
 - Simply click in the field to get the **full list** of available values.
 - If you have a long list of items, you can **narrow the list** by using the "%" sign in combination with a character string. (EX: c%1, c%2, etc.)



- **Type in Character String**
 - Typing a character string within a field will display any values matching that character string. The character string does not have to be at the beginning of the returned value.

PROJECT	TASK	LABOR CATEGORY
myj		
1	MYCO ADMIN	
	MYCO HOLIDAY	
	MYCO TRAINING	

Comments:

Remember the Company Picnic is This Friday!

Save Submit Preview My Projects

- **Clearing Required Fields**

- If a field is required and has a default value defined in the system, it cannot be cleared. The system will automatically restore the previous value.

Hours and Comments

Your Unanet System Administrator will enforce any internal policies regarding time entry requirements and comments. It is recommended that you enter time daily and **Save** at the end of each day.

Comments may be required upon entering hours in the timesheet. An alert message will be displayed and comments must be entered before **Save** is allowed.

The Comments box on the timesheet will always stay visible when you have to scroll right on the grid.

Comments:

Remember the Company Picnic is This Friday!

Save Submit Preview My Projects

My Projects

Based on the system configuration, additional projects and/or tasks may be added to the timesheet dropdown menus.

When editing a timesheet, users can select the projects and/or tasks available in the dropdown menus by clicking **My Projects** at the bottom of the timesheet. You can return to editing the timesheet by clicking **<Timesheet**.

The My Projects screen is also accessible by navigating to **Time > My Projects**. However, this screen does not allow the return to editing the timesheet by clicking **<Timesheet**.

Saving the Timesheet

After entering time data, click **Save** at the bottom of the screen. The timesheet will remain in a status of INUSE and will be available to the user for time entry during the remainder of the time period.

Edit a Timesheet

Navigate to **Time > Dashboard**; **Time > List**; or **Home > Dashboard** and find *Active Timesheets*. Click the **edit pencil icon** to open a timesheet and continue data entry.

Active Timesheets										
TIME PERIOD	HOURS	STATUS	CONTROLLER							
5/1/2019 — 5/15/2019	25	INUSE	5/2/2019	2:29 PM	Frank T. Controller (fcontroller)					

Audit Trail

You may have the Audit trail turned on in your system. If so, after saving an entry on the timesheet, any change to that entry will require a change reason and will store the data in a viewable audit trail. After making changes to cells and clicking **Save**, a Change Reason screen will appear for this data entry.

Time – Timesheet for Controller, Frank T. (fcontroller) (5/1/2019 - 5/15/2019)

Audit Trail - Enter a change reason for all modified entries

Cell Details

Provide an individual Change Reason for each modified entry
 Use a single Change Reason for all modified entries

DATE	PROJECT	TASK	LABOR CATEGORY	LOCATION	PROJECT TYPE	PAY CODE	WORK HOURS	PROJECT TIME IN/OUT		
								IN-OUT	NON-WORK HOURS	COMMENTS
	CUSTOMER-2 SPACE-STATION	1. Requirements	GSA-Program Manager	KS - Fort Leavenworth	BILLABLE	RT	0			
	Comments:									
Fri 3	CUSTOMER-2 SPACE-STATION	1. Requirements	GSA-Program Manager	KS - Fort Leavenworth	BILLABLE	RT	9			
	Comments:									
	Change Reason: <input type="text" value="<Please pick a value>"/>									
	CUSTOMER-2 SPACE-STATION	1. Requirements	GSA-Program Manager	KS - Fort Leavenworth	BILLABLE	RT	9			
	Comments:									
Fri 3	CUSTOMER-2 SPACE-STATION	1. Requirements	GSA-Program Manager	KS - Fort Leavenworth	BILLABLE	RT	8			
	Comments:									
	Change Reason: <input type="text" value="<Please pick a value>"/>									

Save

Under *Cell Details* at the top of the screen, select a Change Reason method:

- Provide an individual Change Reason for each modified entry
- Use a single Change Reason for all modified entries

Timesheet Completion and Approval

At the end of each time period, you must complete all data entry and submit the timesheet for approval. Click **Submit** at the bottom of the timesheet to complete this process. On the resulting screen enter an optional comment if further information is necessary for the approver and click **Submit**.

Comments:

Remember the Company Picnic is This Friday!

Time – Timesheet for Controller, Frank T. (5/1/2019 - 5/15/2019)

Timesheet Comments:

You have selected to submit this timesheet. You may optionally include comments with your submission. To confirm and continue the submission process, click on the Submit button. If you have reached this screen in error, simply click Cancel.

Approval History

After the timesheet is submitted, it will move through an approval process defined by the System. All users entering data, submitting the timesheet and approving the timesheet will record an entry in the Approval History with the username, date, time, and any comments.

To review this information, click the **magnifying glass icon** for the desired timesheet, then click *Approval History* to expand that link and view the history details.

Email Notifications will be sent to the participants in the approval process that contain the status and information on further actions.

Time – Timesheet for Frank T. Controller (5/1/2019 - 5/15/2019) - Salaried

PROJECT/TASK	LABOR CATEGORY	LOCATION	PROJECT TYPE	PAY CODE
CUSTOMER-2 BIG-DATA				
1. Research/Analysis	GSA-Administrative Assistant	KS - Fort Leavenworth	BILLABLE	RT
CUSTOMER-2 SPACE-STATION				
1. Requirements	GSA-Program Manager	KS - Fort Leavenworth	BILLABLE	RT
TOTALS:				

Approval History

BY (FOR)	ROLE	PROJECT	STATUS	COMMENTS
Frank T. Controller	Administrator		INUSE 5/2/2019 2:29 PM	Time Import

Audit Trail

Edit

Timesheet Statuses

Review the status of timesheets by navigating to **Time > List**. Timesheets can be viewed according to category:

- Active Timesheets
- Current Leave Requests
- Completed Timesheets
- Past Leave Requests

Time – List

Active Timesheets + Timesheet

TIME PERIOD	HOURS	STATUS	CONTROLLER
5/1/2019 — 5/15/2019	24	INUSE 5/2/2019 2:29 PM	Frank T. Controller (fcontroller)

Current Leave Requests + Leave Request

DATE RANGE	HOURS	STATUS	COMMENTS
There are no current leave requests.			

Completed Timesheets

TIME PERIOD	HOURS	STATUS	
4/16/2019 — 4/30/2019	8	LOCKED	5/2/2019 2:29 PM
4/1/2019 — 4/15/2019	8	LOCKED	4/16/2019 9:54 AM

Active and Completed timesheets will be displayed with one of the following statuses:

- INUSE - The timesheet is in use by the owner. It has been saved but not submitted for approval.
- SUBMITTED - The timesheet has been submitted and has not been reviewed by an Approver.
- APPROVING - The timesheet has been approved by one or more approvers, but additional approval is necessary. View the *Approval History* entries to determine who has approved the timesheet.
- COMPLETED - When all approvals have been made, the status is changed to COMPLETED. When the timesheet enters this state, it is no longer visible under *Active Timesheets*. At this point, the timesheet can be viewed under *Completed Timesheets*.
- EXTRACTED - The timesheet has been LOCKED and may no longer be available to edit.
- LOCKED - Your system may be configured to auto-lock upon Completion (final approval). This is a LOCKED status just like EXTRACTED.

