

Timesheet Help



www.pacifictimesheet.com

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Introduction

Welcome to Pacific Timesheet , the premier web timesheet. Pacific Timesheet allows your employees to track their time and attendance from a web browser, time clock or cell phone. Pacific Timesheet is available as an online service, or can be hosted on your own server. Click [here](#) for a list of supported browsers and platforms.

Note: This help document is context-sensitive. When you select a page in Pacific Timesheet and click the Help link at the top of that page, the appropriate help topic will load.

Click [here](#) for a PDF version of this documentation.

Related Topics

- [Setup Quick Start](#)
- [System Requirements](#)

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Browser Requirements

Pacific Timesheet is a web-based application and supports the following web browsers:

Supported Browsers	
Apple Safari	4.0 or later
Google Chrome	3.0 or later
Microsoft Internet Explorer	7.0 or later
Mozilla Firefox	3.0 or later

Note: This application tries to minimize the use of popup windows as much as possible. However, there are some areas of the application that by necessity require a popup window. You therefore may need to unblock popups for this application under certain circumstances.

Server Requirements

If you are hosting the software yourself, here are the server requirements:

Supported Hardware	
Computer and processor	PC or Macintosh with Intel Pentium 4-compatible 2 GHz processor
Memory	2 GB of RAM
Disk space	250 MB of available hard disk space for the program files. Additional space is needed to store timesheets and other employee data (see below).

Supported Operating Systems	
Microsoft Windows	Server 2003, Server 2008, Vista, 7
Linux	SUSE, RedHat or any other Linux distribution capable of running Java 1.5 or later.
Apple Macintosh	OS X, any version capable of running Java 1.5 or later.

Supported Databases	
Microsoft SQL Server	SQL Server 2005, 2008 with Mixed Mode Authentication (Windows Authentication and SQL Server Authentication) enabled.
MySQL	Version 5.0.22 or later.
Oracle	Oracle 9i or later.

In general, hard disk space is related to the number of timesheets written annually. A timesheet typically requires about 150K of storage. Based on this value the following table will help you determine the amount of hard disk usage you can expect annually:

Hard Disk Usage	
Timesheets Per Year	Hard Disk Allocation Per Year
500	75 MB

5,000	750 MB
10,000	1.5 GB
20,000	3 GB

You can optionally integrate with access devices to record employee time and attendance. The following devices are supported:

Manufacturer	Model
ACTatek www.actatek.com	<ul style="list-style-type: none">• PIN• Smart Card• Fingerprint• Combination

Setup Quick Start

If you are an administrator setting up Pacific Timesheet for the first time you will want to read this page to familiarize yourself with some basic concepts, and learn how to get up-and-running quickly. Please note that you can always get detailed information for each page of the application by clicking the context-sensitive Help link in the upper-right corner.

Step 1. Configure System Settings

The first steps you should take to set up your system are to configure the following global or system-wide settings:

- Set the default time zone for your employees on the [System > General](#) page.
- Specify your work break down structure (WBS) on the [System > Work Breakdown Structure](#) page. For example, one business might track time against customers, projects and tasks. Another business might track time against clients and jobs.
- Configure timesheet periods appropriate for your payroll or other reporting cycles from the [System > Time Periods](#) page.

Note that you can change the above settings at any time, but doing so after employees start entering time might be disruptive.

You may optionally want to do the following before rolling the system out to your employees:

- Set your list of company holidays from the [System > Holidays](#) page.
- Change the wording or terminology used for some labels from the [System > Terminology](#) page.
- Upload your company logo and make other branding changes from the [System > Branding](#) page.
- Configure bill and pay rates from the [System > Bill Rates](#) and [System > Pay Rates](#) pages.

Step 2. Configure Timesheet Templates

The [System > Templates](#) page is where you configure the data fields that are displayed on timesheets. You can create any number of different timesheet templates for different needs. Two sample timesheet templates are provided:

1. The "Attendance Timesheet" template is for attendance-oriented time entry, and captures daily in/out times and pay codes (e.g. Regular Time, Over Time, etc.).
2. The "Project Timesheet" template is for project or job-oriented time entry, and captures hours against customers, projects and tasks.

You can use and modify these templates, or create any number of new ones to suit your needs. When adding employees (described below), you will specify the timesheet template as part of their profile.

Step 3. Configure Employee Policies

Employee policies allow you to control a variety of timesheet options, such as rounding rules, leave accruals and over time calculations. You should review the "Standard Policy" settings on the [System > Policies](#) page, then make changes or create new policies as desired. You can have any number of different employee policies, such as separate policies for exempt and hourly employees. When adding employees (described below), you will

specify the policy as part of their profile.

Step 4. Configure Pay Codes

The [System > Pay Codes](#) page lists the available pay codes. Pay codes are customizable values that you can use to track different types of work and leave hours. Work pay codes can include regular time, over time, etc. Leave pay codes can include sick, vacation, etc.

Work pay codes are often used for tracking overtime. With Pacific Timesheet you have two choices about how overtime is handled:

1. You can have your employees select whether their hours are regular time, overtime, etc. on their timesheet via a pull down menu. To do this you add the Pay Code field to your timesheet template(s).
2. You can have overtime be computed automatically by enabling overtime rules for the employee policy. If you do this you will generally want to remove the Pay Code field from the timesheet template, as you don't want the employee to enter their overtime values. You will still be able to report on overtime hours even if there is no Pay Code field on the timesheet.

Leave pay codes, such as sick and vacation, can have an associated balance. Any hours an employee enters on their timesheet for these pay codes will automatically have an equivalent amount deducted from their balance. Rules for whether balances are allowed to go negative, as well as automatic accruals, are configured by editing the balance rules on the appropriate employee policies.

Step 5. Add Projects/Tasks

Depending upon your work breakdown structure, you may need to visit the [Tasks](#) page and create lists of customers, projects, tasks, jobs, etc.

Note that you can also import tasks, etc. in bulk from an external system via import files. The [Importing/Exporting](#) help topic has more details.

Step 6. Add Employees

The [Employees](#) page is where you add and edit your list of employees. Make sure the appropriate policy and timesheet template is selected for each employee.

You will also want to select the appropriate permission level for each employee, for example "Employee" or "Manager". Permission levels control what access to the timesheet system the employee will have, as well as giving fine-grained control over some aspects of time entry. You can modify the permissions from the [System > Security](#) page, as well as create entirely new permission levels.

Note that you can also import employees in bulk from an external system via import files. The [Importing/Exporting](#) help topic has more details.

Employee groups can be created from the [Employees > Group](#) page. Employee groups can represent a variety of different logical entities, such as cost centers, permission groups and construction crews.

Step 7. Miscellaneous

Here are a few other topics worth being aware of:

- A variety of reports are available, and can be customized for your requirements. Pacific Timesheet allows you to publish your custom reports and make them available to any

suitable permission level. For instance, you can make a customized billing report available only to managers, or an hours summary report available to employees.

- You may want to modify the audit level if you have stringent auditing requirements, such as DCAA. You can do this from the [System > General](#) page.
- Most objects can be customized to add additional data fields. For instance, you might want to add an employee photograph to the employee object, or a location pick list to the timesheet template. Choose the "Manage Custom Fields" menu option in the pop-up options menu in the upper-right corner of most lists of objects.

Please let us know if we can help you by contacting your sales representative or visiting our support site at <http://www.pacifictimesheet.com/>. Thank you for using Pacific Timesheet!

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Home

The Home page is where you manage your employee account and preferences. It also provides a "dashboard" where you can quickly view your balances, leave requests, company announcements and other information.

The Calendar shows recent and upcoming holidays and leave requests.

Related Topics

- [Change Password](#)
- [My Account](#)
- [Preferences](#)
- [Leave Requests](#)
- [Holidays](#)
- [Announcements](#)

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Change Password

You can change your password at any time from this page. For security reasons you will need to provide your old password.

Note: Passwords are case-sensitive, and can never be the same as your login name. There may be other constraints, such as being a minimum number of characters in length, depending upon how your application administrator has configured the password security settings.

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My Account

The My Account page lets you view and change your employee profile. Your employee profile has the following properties:

Property	Description
Login Name	Your login name, which can only be changed by an employee manager or administrator.
First Name	Your first name, up to 80 characters.
Last Name	Your last name. This field is required and can be up to 80 characters.
ID	Your employee ID, which can only be changed by an employee manager or administrator.
Status	Your account status, either Active, Inactive or Locked. Accounts can become locked after too many unsuccessful login attempts. This can only be changed by an employee manager or administrator.
Job Title	Your job title, which can only be changed by an employee manager or administrator.
Reporting Group	Your primary or reporting group. This property may be renamed by your application administrator to something more appropriate for your organization, such as Division, Cost Center or Charge Code. This can only be changed by an employee manager or administrator.
Email	Your email address, up to 80 characters.
Phone	Your phone number, up to 40 characters.
Mobile	Your mobile phone number, up to 40 characters.
Fax	Your fax number, up to 40 characters.

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Preferences

The Preferences page lets you view and change your application preferences. This includes the following properties:

Property	Description						
Timesheet Memory	<p>Allows you to specify whether rows and hours are carried forward from the previous timesheet when a new timesheet is created. Options include:</p> <table border="1"> <tr> <td>None</td> <td>New timesheets will have no rows or hours carried forward from the previous time period.</td> </tr> <tr> <td>Rows</td> <td>New timesheets will have the same rows as the timesheet for the previous period, but all hours fields will be blank. This is the default value for employees.</td> </tr> <tr> <td>Rows and Hours</td> <td> <p>New timesheets will have the same rows and hours as the timesheet for the previous period. Only work hours are carried forward - leave (or paid time off) rows will carry forward, but not the hours.</p> <p>Note that you can hide this option from employees by turning off the "Can copy previous timesheet hours" timesheet permission for the employee's permission level. See the Permission Levels topic for more information.</p> </td> </tr> </table>	None	New timesheets will have no rows or hours carried forward from the previous time period.	Rows	New timesheets will have the same rows as the timesheet for the previous period, but all hours fields will be blank. This is the default value for employees.	Rows and Hours	<p>New timesheets will have the same rows and hours as the timesheet for the previous period. Only work hours are carried forward - leave (or paid time off) rows will carry forward, but not the hours.</p> <p>Note that you can hide this option from employees by turning off the "Can copy previous timesheet hours" timesheet permission for the employee's permission level. See the Permission Levels topic for more information.</p>
None	New timesheets will have no rows or hours carried forward from the previous time period.						
Rows	New timesheets will have the same rows as the timesheet for the previous period, but all hours fields will be blank. This is the default value for employees.						
Rows and Hours	<p>New timesheets will have the same rows and hours as the timesheet for the previous period. Only work hours are carried forward - leave (or paid time off) rows will carry forward, but not the hours.</p> <p>Note that you can hide this option from employees by turning off the "Can copy previous timesheet hours" timesheet permission for the employee's permission level. See the Permission Levels topic for more information.</p>						
Hours Format	The choice of how you enter hours on your timesheet, either decimal format (for example 3.5) or hours:minutes (for example 3:30).						
Tab Direction	The direction the selection moves when you type the tab key on your timesheet, either vertical or horizontal.						
Remember Last	The number of most recently used clients, projects, etc. to remember (25 max). To erase the list of most recently used items click the Clear List button.						
Locale	<p>Your locale determines the following:</p> <ul style="list-style-type: none"> • The language displayed, e.g. English, French, Chinese, etc. • The formatting of dates and numbers. If you choose a locale that has AM/PM as part of its time format, you have the option of overriding that by choosing the 24 hour time format (sometimes called military time). • The list of company holidays for the selected location 						
Time Zone	Your time zone.						
Search Results	The number of rows to return per page of results, such as when searching for employees, timesheets, etc.						
Default Tab	The tab to select upon logging into the application.						
Export Format	<p>The file format for exporting timesheet data, employee lists, etc.</p> <ul style="list-style-type: none"> • CSV is a text format compatible with most systems (including Microsoft Excel), and is the default value for employees. • MS Excel is the Microsoft Excel format, a binary format generally only compatible with Microsoft Excel. 						

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Announcements

Announcements are messages displayed to every employee who logs into the application. You can use this feature to alert your employees of special events, such as maintenance down time, or to company policies such as when timesheets are due.

Note: Text formatting is standard HTML. If your browser supports it, you will see a WYSIWYG editor when editing the announcement text. You can click the "Source" button on the editor tool bar to view and edit the HTML source. The maximum length of the HTML is limited to 4000 characters (2000 characters if using Oracle for the database), and if you exceed this amount the text will be truncated.

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My Timesheet

The My Timesheet page is where you enter hours into your timesheet. By default you will be taken to the timesheet for the current time period. You can change the time period by clicking the Time Period link or clicking the next/previous buttons beside the Time Period link. Time periods are determined by your application administrator, and usually correspond to payroll or other company time periods.

A timesheet has a status, which can be **Open**, **Submitted**, **Approved** or **Rejected**. The Open status means you can enter hours and make other edits to your timesheet. When you have finished filling out your timesheet you should click the Submit button, which changes your timesheet status to Submitted. Submitted timesheets cannot be edited.

Submitted timesheets can be reviewed and approved by an employee manager. If the manager finds a problem with the timesheet they might reject it, which will revert the timesheet back to its Open status, allowing you to correct any problem

If your timesheet status is Open you can delete it and start over with a new one by clicking the **Delete** button.

Timesheet Views

You can view your time entries using a **Day View**, **Week View**, **Summary View** or **Printable View**. You can switch between views at any time, and changing your view will save any changes you have made to your timesheet automatically. The Day View allows you to view and enter time on a day-by-day basis. The Week View allows you to view and enter time on a weekly basis (this view is not available if you are entering start times with your time entries). The Summary View is a read-only view that lists all of the time entries for the entire time period. The Printable View will generate a PDF version of the Summary View, which is suitable for printing and signing by your manager.

Timesheet Rows

There are two types of time entries you can add to your timesheet: Work and Leave (note that the terminology for these two types might have been changed by your application administrator). Work time entries are added by clicking the **Add Work** button. Work time entries generally require entering a **Task** or other description of the work done.

Leave time entries are added by clicking the **Add Leave** button. Leave time entries generally require you select the type of leave, for example Vacation.

You can delete one or more rows at a time by checking the desired rows on your timesheet and then clicking the **Delete Row** button.

If you are entering start times then rows will be ordered from earliest to latest. If you are not entering start times then you can order the rows as you like by checking the desired rows and then clicking the **Move Up** or **Move Down** buttons.

Choosing Tasks

Your timesheet may be configured for you to choose a **Task**, **Project** or other additional properties for each time entry. The exact set of properties you need to choose will depend on how your application administrator has set up the work breakdown structure (WBS) for your organization. Choosing a Task, Project, etc. will pop up the Task browser, which allows you to choose any level of the WBS.

You may narrow down the list of tasks shown in the browser by entering a query and

clicking the Search button. You can refine your query using the '*' character. For instance, to return all tasks starting with the letter 't' enter the query 't*'. To find all tasks ending with the letter 't' enter '*t'. Searching for '*t*' is the same as just searching for 't' - it will return any task with the letter 't' in it.

Timesheet Notes

The **Notes** field at the bottom of the timesheet allows you to enter notes or comments about the timesheet. This is commonly used to inform your manager or approver about anything special regarding your timesheet. The maximum size of a note is 4000 characters.

Other Timesheet Commands

There is a popup menu of additional Timesheet commands in the upper-right corner of the timesheet. These commands include:

Copy Previous Timesheet will copy the rows and hours entered on the previous timesheet. This command will only be available if the current timesheet has not been submitted and has no hours, to avoid inadvertently overwriting your timesheet.

Copy Previous Rows will copy the rows (but not the hours) from the previous timesheet. This command will only be available if the current timesheet has not been submitted and has no hours, to avoid inadvertently overwriting your timesheet.

Copy Previous Day will copy the time entries for the previous day to the current day. This command will only be available when in the Day View and if the current timesheet has not been submitted and the day has no hours. If you choose this command for a Monday it will move back to Friday to look for previous time entries if none are found on the weekend.

Delete Timesheet will delete the current timesheet. This command is only available if the current timesheet has not been submitted.

My Assets

The "My Assets" page allows you to record non-labor types of data such as materials, equipment and other types of assets you use as part of your project or job work. As Pacific Timesheet allows asset tracking to be configured in many different ways (for example you may be recording materials, equipment and expenses) the specifics of the "My Assets" page will depend upon your organization's configuration of Pacific Timesheet.

Note that the types of assets that can be entered on the "My Assets" page is controlled in part by the timesheet template that is assigned to you by your application administrator. For instance, your system may be configured for both Materials and Equipment, but if your timesheet template only has Materials enabled then the "My Assets" page would instead be "My Materials", and you would only be able to enter the materials you used.

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Crew Timesheet

Crew timesheets allow the daily entry of time for groups (crews) of employees. Crew timesheets are a convenient and efficient way to enter time for crews of employees that do not record their own time, such as field workers on construction sites.

Note: You can change the terminology for 'Crew' to suit your organization's needs. The [Terminology](#) topic has more information.

Crew timesheets are accessed from the "Crew Timesheet" tab. To access this tab crew timesheets they must first be enabled from the System > General > Timesheet Options page. In addition, you must be a timesheet manager or approver for at least one group, and have the 'Can View Crew Timesheet' option enabled in your employee permission level.

Configuring Crew Timesheets

The fields that appear on the crew timesheet (e.g. Hours, Project, Task, etc.) come from the timesheet template of the employee that appears first in the crew. To add employees to the crew simply click the "Add Employee" link at the bottom of the list of employees, then choose the appropriate employee(s) to add. You can also add employees to the crew by going to the Employees > Groups page and configuring the list of employees for each crew (group).

If you are an administrator (that is, you can edit timesheet templates on the System > Templates page), then you will be able to alter they layout of the crew timesheet. To do this, click the "More" menu button (the triangle icon in the upper-right corner of the crew timesheet) on the Crew Timesheet page, then click the "Timesheet Options" link. You will have access to the following layout settings:

Property	Description
Day Fields	Choose which fields from the timesheet template should appear at the top of the crew timesheet. Day fields values apply to every row and column of the crew timesheet for the selected date.
Column Fields	Choose which fields from the timesheet template should appear above each column where the hours are entered. Column field values apply to every row in the column.
Row Fields	Any remaining fields that are not selected as day or column fields are considered row fields, and will show up on each row for each employee.
Show Employee ID	Check this option if you want to display the Employee ID column next to the Employee column in the layout. Note that even if not checked, the user can always view an employee's ID and other properties by clicking the employee's name in the crew timesheet.
Employee Grouping	Use this option to group certain types of employees at the top of the list of employees on the crew timesheet. For instance, you might want employees with the Permission Level of 'Manager' to always be at the top of the list. Another example is to group employees with the Policy 'Full Time' at the top of the list, so that 'Part Time' employees sort below them (note that these policy names are not built into the product and are just examples).
Tab Direction	You can choose whether the tab key will take you to the next column (horizontal) or to the next row (vertical).

Remember Last	This option will determine how many previously selected projects, tasks, etc. will be remembered for easy access.
Crew Parent Field	If you have a lot of crews you may want to organize them into different categories or types. For instance, you might create a group custom field named "Region" and specify a geographic region for each crew. Specify the "Region" field in this example for the crew parent field in order to make browsing for crews more convenient.

Crew Approval Kiosk

You can access a special "kiosk" version of the Pacific Timesheet web interface that provides a streamlined or simplified crew timesheet approval page. From the Crew Timesheet click the "more" menu (the triangle in the upper-right corner of the page) and select the "Crew Approval Kiosk" option. The Crew Approval Kiosk gives you a "read-only" report of the crew timesheet data in either weekly or daily format, and allows you to submit, approve or reject the data, depending upon your permissions.

You can provide your clients with the link to this page (e.g. <http://someco.pacifictimesheet.com/timesheet/kiosk/crew-approval.do>) to allow them to review and approve timesheet data. You will need to provide them with a Pacific Timesheet employee account so that they can log in. This account should have very limited permissions, e.g. only the ability to approve timesheets, and no timesheet template. Your application specialist can assist you with setting up such client access accounts.

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Managing Timesheets

Employees can be given permission to manage other employee's timesheets. A timesheet manager can view, edit and even delete timesheets, depending upon their permission level. Any employee whose **Permission Level** allows timesheet management (for example Administrator or Manager) can manage timesheets and will see the **Timesheets** tab. If you do not see the Timesheets tab then you have not been given a Permission Level with timesheet management permissions. You can check an employee's Permission Level from the **Employees** tab.

If the employee's permission level allows only limited timesheet management then the employee will need to be added to the permission list for one or more employee groups. This can be done by clicking the **Groups** link under the Employees tab, then clicking one of the groups in the list. In the **Permissions** section for the group click the **Edit** button and add the employee to the permission list with the appropriate permission level. The [Groups](#) topic has more information.

Note: You can use timesheet management permissions to create "time keepers" - employees with the ability to enter time for other employees. This avoids the need to log in as another user in order to fill out their timesheet. If implementing time keepers it is recommended that you create a new Permission Level with only the minimum required timesheet permissions such as manage, edit and create. The [Permission Levels](#) topic has more information.

Timesheet Lookup

To list employee timesheets click the **Timesheets** tab, enter an appropriate **Start** date, then click the **Search** button. You can optionally enter a **Finish** date and **Status** in order to narrow down the list of returned timesheets.

If you do not find any timesheets then you may have only limited timesheet management permissions. As mentioned above, you may need to be added to the permission list for one or more employee groups.

Clicking a **Time Period** link in the list will load that employee's timesheet. Depending upon your permission level, you may be able to edit or even delete this timesheet.

Exporting Timesheets

If your permission level allows it you can export the list of timesheets by clicking the popup menu in the upper right of the list and then clicking the **Export List** link. This will export the timesheet status information as displayed in the list to your local computer, in comma-separated value (CSV) format. This file can then be opened in Microsoft Excel or other applications that support the CSV format. You can optionally change this to Microsoft Excel's native format (XLS) by clicking the Preferences link on the Home tab.

Clicking the **Export Timesheet Data** link will download the time entries for each timesheet in the list as a file that you can save on your local computer. This is useful for exporting time entries to external systems such as Payroll processing applications. You can optionally mark time entries as being exported, so that you can avoid re-exporting the same data. Once a timesheet has been marked as exported it cannot be unsubmitted (unlocked) for re-editing. You will need to make corrections to the timesheet by clicking the "Add Correction" button. This is a safeguard to avoid modifying previously exported time entries. Note that administrators (those with the "Can Manage All" timesheet permission) can bypass this restriction and still unsubmit a previously exported timesheet, if the need arises.

Another option for getting access to timesheet data is to run a **Timesheet Details** report. This report can be customized to only output the fields you require, and can be downloaded in a number of formats, including Microsoft Excel. The [Reports](#) topic has more information.

Importing Timesheets

If your permission level allows it you can import timesheet data by clicking the popup menu in the upper right of the list and then clicking the **Import Timesheet Data** link. The [Importing/Exporting](#) topic has more information.

Printing Timesheets

The 'Print Timesheet' option in the popup menu in the upper right corner of the timesheet list allows you to download a PDF hard copy of all of the timesheets in the list. This is useful if you need to print out multiple timesheets for signing, for instance. Note that, rather than printing the entire list, you can print selected timesheets by clicking the checkbox on each row before selecting the 'Print Timesheets' option.

You can also print individual timesheets by clicking the time period link in the timesheet list, then clicking the 'Print' view button in the upper-right corner of the timesheet. This will download a PDF version of the timesheet suitable for printing.

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Time Entry Corrections

Administrators and managers with the ability to edit timesheets may add corrective or adjustment time entries to a timesheet that has been previously submitted or approved. Once a timesheet has been submitted (locked) an "Add Correction" button will appear on the timesheet. This allows you to make a change to the timesheet without unsubmitting it first. This is necessary in instances where you only want to resend correction time entries (either with negative or positive hours) to your payroll or billing systems.

To make a correction, locate the submitted or approved timesheet, switch to either the Day, Week or Summary view, then click the "Add Correction" button. You will be presented with a dialog in which you can enter properties for the corrective time entry, such as the pay code, project, task and hours. If you want to make a change to an existing time entry, select the time entry row before clicking the "Add Correction" button, and all of the fields will be pre-filled.

You can enter negative hours in a correction time entry in order to subtract hours from a previous entry. For instance, in order to subtract 2 hours from a previous time entry, you would select the previous time entry, click the "Add Correction" button, then enter -2 in the hours field. When you click OK you will see the new negative time entry on the timesheet.

After adding correction time entries to a timesheet, any export flags for the timesheet will be cleared. In this way you will be able to re-export the timesheet and send the correction time entries to your payroll system. Adding a time entry correction to a timesheet will not affect other time entries on that timesheet, making it easy to export only the corrections to your payroll or billing systems.

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Approvals

Pacific Timesheet has several flexible options for approving your employee's time. In addition to allowing multiple approval levels, you can approve employee time in several different formats.

Note: Leave requests are approved from the Leave Requests tab. See the [Leave Requests](#) topic for more information.

Timesheet Approval

Timesheet approval is the most commonly used type of approval, and is especially useful for payroll and human resources applications. With timesheet approval you can review and approve employee time for entire time periods. You can also review and approve (or reject) individual line items or entries within a period. Refer to the [Approving Timesheets](#) topic for more information.

Project Time Approval

Project time approval allows project managers to review and approve (or reject) employee time recorded for specific projects. Refer to the [Approving Project Time](#) topic for more information.

Crew Time Approval

Crew time approval allows job supervisors and managers to review and approve (or reject) time entered for crews of workers. Refer to the [Approving Crew Time](#) topic for more information.

Approving Timesheets

Submitted timesheets can be electronically signed by an employee's approver. An employee can have a **Primary Approver** and a **Backup Approver**. Approvers are assigned to an employee from the [Employee Details](#) page. Note that to be an approver the employee must have a **Permission Level** such as Administrator or Manager with the "approve" timesheet permission checked. If you do not see the **Approval** tab then your permission level does not have the "approve" timesheet permission checked.

A backup approver has the same permissions as a primary approver, but will not be sent any approval-related email notices. The [Notices](#) topic has more information.

Timesheet Lookup

To list employee timesheets click the **Approval** tab, enter an appropriate **Start** date, then click the **Search** button. You can optionally enter a **Finish** date and **Status** in order to narrow down the list of returned timesheets. If you do not find any timesheets no matter what search criteria you use then you may not be assigned to any employees as an approver.

Timesheet Approval/Rejection

Timesheets in the list that are submitted (pending approval) can be approved by checking the checkbox in the **Approved** column. Then click the **Save** button to save the approval change.

You can approve individual time entries (line items) by clicking the **Time Period** link in the timesheet list. This allows you to view the timesheet details and approve each row individually. When all time entries are approved then the entire timesheet is considered approved.

When viewing the individual time entries you have the option of rejecting any of them, and thereby rejecting the timesheet. To reject a time entry check the **Rejected** checkbox for the appropriate time entry, enter a **Reject Reason** at the bottom of the page, then click the **OK** button to save the changes. A rejected timesheet is un-submitted and sent back to the employee for correction.

Approval Options

You can customize which time entry fields are displayed in the timesheet details page by clicking the popup menu in the upper-right corner and choosing **Options**. The **Timesheet Approval Options** page lets you customize which timesheet fields are displayed in the timesheet approval page. For a detailed description of the various timesheet fields refer to the [Templates](#) topic.

Approval Levels

Your system can be configured to have multiple approval levels (including zero levels, for organizations that don't need timesheet approval). This is covered more fully in the [Approval Levels](#) topic.

Crew Time Approval

An alternative to approving timesheets is to use the [Crew Time Approval](#) page. This is more appropriate for construction and field service applications where you are doing daily time approval.

Exporting Timesheets

If your permission level allows it you can export the list of timesheets by clicking the popup menu in the upper right of the list and then clicking the **Export List** link. This will export the timesheet status information as displayed in the list to your local computer, in comma-separated value (CSV) format. This file can then be opened in Microsoft Excel or other applications that support the CSV format. You can optionally change this to Microsoft Excel's native format (XLS) by clicking the Preferences link on the Home tab.

Clicking the **Export Timesheet Data** link will download the time entries for each timesheet in the list as a file that you can save on your local computer. This is useful for exporting time entries to external systems such as Payroll processing applications. You can optionally mark time entries as being exported, so that you can avoid re-exporting the same data. Once a timesheet has been marked as exported it cannot be unsubmitted (unlocked) for re-editing. You will need to make corrections to the timesheet by clicking the "Add Correction" button. This is a safeguard to avoid modifying previously exported time entries. Note that administrators (those with the "Can Manage All" timesheet permission) can bypass this restriction and still unsubmit a previously exported timesheet, if the need arises.

Another option for getting access to timesheet data is to run a **Timesheet Details** report. This report can be customized to only output the fields you require, and can be downloaded in a number of formats, including Microsoft Excel. The [Reports](#) topic has more information.

Importing Timesheets

If your permission level allows it you can import timesheet data by clicking the popup menu in the upper right of the list and then clicking the **Import Timesheet Data** link. The [Importing/Exporting](#) topic has more information.

Printing Timesheets

The 'Print Timesheet' option in the popup menu in the upper right corner of the timesheet list allows you to download a PDF hard copy of all of the timesheets in the list. This is useful if you need to print out multiple timesheets for signing, for instance. Note that, rather than printing the entire list, you can print selected timesheets by clicking the checkbox on each row before selecting the 'Print Timesheets' option.

You can also print individual timesheets by clicking the time period link in the timesheet list, then clicking the 'Print' view button in the upper-right corner of the timesheet. This will download a PDF version of the timesheet suitable for printing.

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Approving Project Time

Project time approval allows project managers to review and approve employee time. Rather than approving entire employee timesheets, employee time is approved on a per-project basis. You can set up permissions such that project approvers only see projects they are allowed to approve.

Enabling Project Time Approval

You enable project time approval from the **System > General > Project Options page**. You can set the following project time approval properties:

Property	Description
Project Time Approval	If checked then project time approval is enabled. When you click the Approvals tab you will now have access to the Project Time Approvals page (depending upon your permissions).
Approval Level	If you have defined more than one approval level you need to select which one is considered project approval.

Enabling project time approval will not automatically grant employees permission to approve projects. You still need to go to the **System > Security page** and modify or add permission levels to enable the "Can approve" project permission. You can specify either "Can approve all" or "Can approve limited" project permission. Any project approver with the "Can approve limited" project permission will need to be assigned permission to each appropriate project. This is done by going to the **Tasks > Projects > Permissions page** and adding the employee to each appropriate project.

Project Time Approval Process

Click the **Approvals tab**. If you have "Can approve" permission on both Timesheets and Projects you will see two links in the area below the Approvals tab: "Timesheet Approvals" and "Project Time Approvals". Click the "Project Time Approvals" link. If you only have "Can approve" permission for Projects (that is, you don't have the "Can approve" permission for timesheets) then you will be taken directly to the Project Time Approvals page when clicking the Approvals tab.

The **Project Time Approvals page** will list summary project time data, organized by project and employee. This gives you a dashboard overview of project time. You can narrow or filter the project time shown by adjusting the following project lookup options:

Property	Description
Time Period	The time period for reviewing and approving project time data. Generally you will choose a prior timesheet period, e.g. "Previous Week" if using weekly timesheet periods. For convenience, the last value selected will be recalled the next time this page is accessed.
Time Entry Status	The approval status filter for the data being reviewed. Possible values are: <ul style="list-style-type: none"> Any: No filtering applied. Open: Only show unsubmitted project time. Pending Approval: Only show submitted project time that is not approved. Approved: Only show project time that is approved. Rejected: Only show project time that is rejected.

Project	If a project is selected then the data will be limited to the specified project.
Employee	Enter an employee name, ID or login to limit the project time to a specific employee. The search will do a partial match, e.g. "ob" will match both "Robert" and "Bob". You can use the wildcard "*" for a more specific match. For example, to find an employees whose name ends with "bert" you would enter "*bert". To find an employee whose name starts with "an" you would enter "an*".
Employee Type	You can select one or more employee types to limit the data to just those employees of the selected type.
Time Entry Notes	You can limit or search for data that contains a specific comment in the time entry notes field.
Reporting Group	You can limit the data to a specific reporting group. Note that "reporting group" is a terminology item, and could have been renamed (e.g. "Cost Center" or "Department").

To review and approve (or reject) the displayed project time click the **Details button** on the right side of each row. This will bring you to the **Project Approval Details page**. On the details page you will see the individual time entries for the specified project and employee. To approve the entries you select one or more rows and click the **Approve button** (or the **Reject button** if rejecting the entries). When you have finished your review you can click the Next/Previous buttons in the upper-right corner of the list to navigate to the next details page. This makes it easy to quickly step through each set of project time entries (you don't need to go back to the summary screen for each employee).

You can undo an approval or rejection by clicking the **"More" popup menu** to the right of the Approve and Reject buttons. Simply select the appropriate entries from the list, then select "Undo Approve" or "Undo Reject".

When reviewing the project time you may want to see different entry fields (e.g. Pay Amount, or Overtime). Administrators can define which time entry fields are displayed on the Project Approval Details page. See the **Project Time Approval Options** below for more information.

Since project approvals can be done for any arbitrary time period (daily, weekly, etc.), it is important to understand when a timesheet is considered entirely project approved. When all of an employee's project time in a timesheet period is project approved, then the entire timesheet will be considered project approved, even if that timesheet has non-project time (e.g. vacation or sick leave). Automatically marking the timesheet as project approved is useful when you have multiple approval levels: a payroll or HR approver can quickly see that a timesheet has been project approved when they are looking at timesheets on the Timesheet Approvals page.

Project Time Approval Options

If you are logged in as an administrator (that is, your permissions allow you to manage system settings and you can see the System tab), you will see an **Options** item in the **"More" popup menu** to the right of the Approve and Reject buttons on the **Project Approval Details** page. Selecting the Options item will load the **Project Time Approvals Options** page. You can change the following options:

Property	Description
Time Entry Details	The list of time entry fields that are displayed on the project time approval details page. You can add additional fields (for example, Bill Amount), or remove fields that are not relevant.

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Crew Approval

The Crew Approval page allows you or your clients to review and approve entries on a weekly or daily basis. The Crew Approval page is accessed as a stand-alone (or kiosk) web page:

<http://hostname/timesheet/kiosk/home.do>

Where the "http://hostname" portion should be replaced with the appropriate value for your Pacific Timesheet installation, for example "https://myco.pacifictimesheet.com".

Once you log into this page you will be able to view and approve/reject entries on a weekly or daily basis for employee groups or crews. To be able to do this you must have the following configuration:

- Your employee profile's permission level must allow you to approve. You can check your permission level from the Employees page, and the permission level can be checked from the System > Security page. You can be set to "Approve All" or "Approve Limited".
- If your approval permission is "Approve Limited" you must next be assigned to one or more employee groups. For every group you are assigned to that you want to be able to approve make sure the permission level is appropriate. For example, if your permission level is "Manager" you must be assigned to one or more groups with the permission level of "Manager".

Note: The system administrator may want to log into the kiosk and configure some of the Crew Approval options first. The online help link in the kiosk provides further information.

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Leave Requests

Leave requests facilitate the scheduling of employee time off. New leave requests are submitted from the Home page by clicking the New Request link. Depending upon your policy settings, your leave requests will automatically show up on your timesheet for the requested days when the request is approved. Note that the term "Leave" may have been renamed by an administrator to "Time Off" or some other terminology. The [Terminology](#) topic has more information.

Leave requests have the following properties:

Property	Description
Request Type	The type of leave request, for example 'Vacation'. The request type is a pay code, and if you are a manager you can configure these from the System > Pay Codes page.
Start Date	The first day of the leave.
End Date	The last day of the leave.
Partial Day	If you are not taking a full day you can check this option to allow you to enter the start time and finish time. Note that you may not see this option if you are not allowed to take partial days of leave for the selected request type. This is controlled by the Time Entry Rules minimum/maximum leave hours setting - see the Time Entry Rules topic for more information.
Requested Leave	The number of leave days/hours to be taken. This will default to the number of days in the selected date range, excluding any weekend days or holidays.
Description	A description of this leave request, up to 255 characters. You might use this to provide additional information to your approver, such as a phone number where you can be reached in an emergency, etc.

Once you have submitted a leave request you can monitor its approval status from the Home page. If your administrator has configured email notifications you will be sent an email when a request is approved or rejected.

Approving Leave Requests

Leave requests require at least one approval level be enabled. You can configure approval levels from the System > General > Approval Levels page - the [Approval Levels](#) topic has more information. In addition, you need to be assigned as an approver to one or more employees to be able to approve leave requests. The [Managing Employees](#) topic has more information.

To list Leave Requests click the Leave Requests tab. By default you will see a list of all future requests. You can narrow or refine the list using the search properties on the page. To approve or reject leave requests simply click the appropriate checkbox in the list and click the Save button. If notices are enabled the employees will automatically receive an email indicating whether their request was approved or rejected. Clicking the Date hyperlink in the list will show more details about the request. You can also approve or reject the request from the details page.

To configure email notices for leave requests go to the System > Notices page. The [Notices](#) topic has more information.

Note: You can change the terminology for Leave to suit your organization's needs. The [Terminology](#) topic has more information.

Leave Request Policy Rules

Administrators can configure policy rules for leave requests from the System > Policies > Schedule Rules page. The [Schedule Rules](#) topic has more information.

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Leave Request Options

The following leave request options can be set:

Property	Description
Default Approval Start Date	When listing requests for approval, look back this many days by default. This setting is available to administrators only and will affect all approvers.

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Managing Tasks

Normally time is recorded against a Work Breakdown Structure (WBS). A set of pre-defined levels are provided: Project Groups, Projects, Task Groups and Tasks. Each level can be renamed as appropriate for your organization, for example Project Groups may be more appropriately called Clients, or Task Groups called Phases or Cost Centers. Also, not all levels need to be used and can be disabled. The [Work Breakdown Structure](#) topic has more information.

Levels may or may not have a hierarchical relationship, for example a Project may belong to a Client, whereas a Cost Center could be used across all Projects.

Related Topics

- [Customers](#)
- [Project Groups](#)
- [Projects](#)
- [Task Groups](#)
- [Tasks](#)

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Customers

Customers have the following properties:

Property	Description
Name	The customer name, up to 80 characters. A value is required and must be unique for all customers.
Description	A description for the customer, up to 255 characters.
ID	The customer ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all customers. This is commonly used for synchronizing with external systems, such as billing or accounting.
Status	The customer status, either Active or Inactive. You cannot delete customers that have been used on timesheets. Setting the status to inactive will prevent any further use of the customer.
Notes	Notes about this customer, up to 2000 characters.

Note: You can change the terminology for Task, Task Group, Project, Project Group and Customer to suit your organization's needs. The [Terminology](#) topic has more information.

Permissions

Permissions allow you to restrict which customers employees can access on their timesheets. Employees with a **Permission Level** that gives them only limited viewing permission, for instance, will only be able to access customers for which they have been added to the permission list.

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Project Groups

Project Groups have the following properties:

Property	Description
Name	The project group name, up to 80 characters. A value is required and must be unique for all project groups.
Description	A description for the project group, up to 255 characters.
ID	The project group ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all project groups. This is commonly used for synchronizing with external systems, such as billing or accounting.
Status	The project group status, either Active or Inactive. You cannot delete project groups that have been used on timesheets. Setting the status to inactive will prevent any further use of the project group.
Notes	Notes about this project group, up to 2000 characters.

Note: You can change the terminology for Task, Task Group, Project, Project Group and Customer to suit your organization's needs. The [Terminology](#) topic has more information.

Permissions

Permissions allow you to restrict which project groups employees can access on their timesheets. Employees with a **Permission Level** that gives them only limited viewing permission, for instance, will only be able to access project groups for which they have been added to the permission list.

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Projects Projects

Projects are objects that can be associated with time and asset entries recorded by your employees. As projects are full system objects they can be extended by adding custom fields: see the Custom Fields help topic for more information.

Note: You can change the terminology for the Project object to suit your organization's needs. For instance you may prefer "Job" instead of "Project". The Terminology topic has more information.

Projects have the following properties:

Property	Description
Name	The project name, up to 80 characters. A value is required and must be unique for all projects.
Description	A description for the project, up to 255 characters.
ID	The project ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all projects. This is commonly used for synchronizing with external systems, such as billing or accounting.
Status	The project status, either Active or Inactive. You cannot delete projects that have been used on timesheets, but setting the status to inactive will prevent any further use of the project.
Planned Start Date	The planned project start date.
Planned Finish Date	The planned project finish or end date.
Planned Work	The planned total number of days or hours to complete this project. Administrators can configure the units (days or hours) from the System > General > Project Options page: see the Project Options help topic for more information.
Actual Start Date	The actual project start date. Note that if a value is specified here it will be used by the Time Entry Rule "Don't allow submitting time for inactive Projects, Tasks etc.". If this rule is enabled then employees will be prevented from recording any time entries with dates prior to the Actual Start Date. See the Time Entry Rules help topic for more information.
Actual Finish Date	The actual project finish or end date. Note that if a value is specified here it will be used by the Time Entry Rule "Don't allow submitting time for inactive Projects, Tasks etc.". If this rule is enabled then employees will be prevented from recording any time entries with dates after the Actual Finish Date. See the Time Entry Rules help topic for more information. If you specify the Actual Finish Date you can also have the project be inactivated automatically a specified number of days afterwards. See the Project Options help topic for more information.

Actual Work	<p>The actual total number of days or hours spent on this project. This value is computed by totalling all hours recorded against this project on employee timesheets. This value is updated every 15 minutes, but you can click the "Refresh" button to update the value immediately.</p> <p>Administrators can configure the units (days or hours) from the System > General > Project Options page: see the Project Options help topic for more information.</p>
Notes	Notes about this project, up to 2000 characters.

Project Permissions

Permissions allow you to restrict which projects employees can access on their timesheets. Employees with a **Permission Level** that gives them only limited viewing permission, for instance, will only be able to access projects for which they have been added to the permission list.

Project Dashboard

The Project Dashboard allows you to track the breakdown of Project hours by Task and Task Group (e.g. "Phase"). In addition to reviewing hours spent on various project tasks, you can compare planned vs actual start and finish dates, as well as planned vs actual hours or days worked. See the Project Dashboard help topic for more information.

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Project Options

The Project Options pages lets you configure global project settings, such as whether project work is displayed as hours our days, the list of task states, etc. Note that the terminology of projects, tasks and other objects can be changed via the [System > General > Terminology](#) page.

The following properties can be configured:

Property	Description
Project Time Approval	If checked then project time approval is enabled. When you click the Approvals tab you will now have access to the Project Time Approvals page (depending upon your permissions). The Project Time Approvals is located under the Approvals tab. See the Approving Project Time topic for more information.
Approval Level	If you have defined more than one approval level you need to select which one is considered project approval.
Default Work Units	This setting determines whether planned and actual work for projects, etc. is entered/displayed in hours or days.
Automatic Inactivation	If enabled then projects, etc. will be automatically inactivated the specified number of days after their Actual Finish Date value. Inactive projects and tasks will not be shown in pick lists on employee timesheets, etc. Note that if no Actual Finish Date value is specified then the project will or task cannot be inactivated automatically.
Task States	This setting lets you control the list of task states, such as "In Progress", "Completed", etc. as suits your organization's needs. Task states are used on the Project Dashboard and are used to track the status of the tasks needed to complete a project.

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Project Dashboard

The Project Dashboard allows you to track the breakdown of Project hours by Task and Task Group (or "Phase"). In addition to reviewing hours spent on various project tasks, you can compare planned vs actual start and finish dates, as well as planned vs actual hours or days worked.

To configure your dashboard click the "Edit" button and add the appropriate tasks (and task groups) to the dashboard. You can click the Refresh link to automatically build this list, too. The Refresh link will add any tasks that have newly added hours, as well as update the actual hours for all of tasks in the dashboard.

You can configure the planned start dates and planned work for each task in the dashboard by clicking the task name link in each row and entering the appropriate values. Once you configure the planned values you will see percentage complete and other statistics in the dashboard.

Note: Dashboard statistics such as Percent Complete are updated approximately every 15 minutes. Clicking the "Refresh" link will update the statistics immediately.

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Task Groups

Task Groups have the following properties:

Property	Description
Name	The task group name, up to 80 characters. A value is required and must be unique for all task groups.
Description	A description for the task group, up to 255 characters.
ID	The task group ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all task groups. This is commonly used for synchronizing with external systems, such as billing or accounting.
Status	The task group status, either Active or Inactive. You cannot delete task groups that have been used on timesheets. Setting the status to inactive will prevent any further use of the task group.
Notes	Notes about this task group, up to 2000 characters.

Note: You can change the terminology for Task, Task Group, Project, Project Group and Customer to suit your organization's needs. The [Terminology](#) topic has more information.

Permissions

Permissions allow you to restrict which task groups employees can access on their timesheets. Employees with a **Permission Level** that gives them only limited viewing permission, for instance, will only be able to access task groups for which they have been added to the permission list.

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Tasks

Tasks

Tasks have the following properties:

Property	Description
Name	The task name, up to 80 characters. A value is required and must be unique for all tasks.
Description	A description for the task, up to 255 characters.
ID	The task ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all tasks. This is commonly used for synchronizing with external systems, such as billing or accounting.
Status	The task status, either Active or Inactive. You cannot delete tasks that have been used on timesheets, but setting the status to inactive will prevent any further use of the task.
Planned Start Date	The planned task start date.
Planned Finish Date	The planned task finish or end date.
Planned Work	The planned total number of days to complete this task.
Actual Start Date	<p>The actual task start date. This property is only available if projects are disabled (see the Work Breakdown Structure topic for more information).</p> <p>Note that if a value is specified here it will be used by the Time Entry Rule "Don't allow submitting time for inactive Projects, Tasks etc.". If this rule is enabled then employees will be prevented from recording any time entries with dates prior to the Actual Start Date. See the Time Entry Rules help topic for more information.</p>
Actual Finish Date	<p>The actual task finish or end date. This property is only available if projects are disabled (see the Work Breakdown Structure topic for more information).</p> <p>Note that if a value is specified here it will be used by the Time Entry Rule "Don't allow submitting time for inactive Projects, Tasks etc.". If this rule is enabled then employees will be prevented from recording any time entries with dates after the Actual Finish Date. See the Time Entry Rules help topic for more information.</p> <p>If you specify the Actual Finish Date you can also have the task be inactivated automatically a specified number of days afterwards. See the Project Options help topic for more information.</p>
Actual Work	The actual total number of days spent on this task. This property is only available if projects are disabled (see the Work Breakdown Structure topic for more information).
Billable	Indicates whether this task is billable or not. Note that you can change which type of object (Project, Task, etc.) has the billable flag. The Rate Options topic has more information.
Notes	Notes about this task, up to 2000 characters.

Note: You can change the terminology for Task, Task Group, Project, Project Group and Customer to suit your organization's needs. The Terminology topic has more information.

Permissions

Permissions allow you to restrict which tasks employees can access on their timesheets. Employees with a **Permission Level** that gives them only limited viewing permission, for instance, will only be able to access tasks for which they have been added to the permission list.

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Asset Tracking

Pacific Timesheet allows you to track assets and their usage. Assets are generally non-labor items you want to track on a regular basis, such as materials, equipment and other resources you use as part of your projects or jobs.

Note: You can change the terminology 'Asset' to suit your organization's needs. The [Terminology](#) topic has more information.

Related Topics:

- [Assets](#)
- [Asset Classes](#)
- [Asset Types](#)
- [Units of Measure](#)
- [Asset Entries](#)
- [Asset Entry Fields](#)

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Asset Entries

Asset entries track the actual usage of assets. Asset entries are records keeping track of what quantities of assets were used over time. For example, you might have a material asset entry of 10 gallons (the quantity) of diesel (the asset) used on Monday 3/28 (the date). You can control the specific fields that are entered for each asset type from the [Asset Entry Fields](#) page.

Note: You can change the terminology 'Asset' to suit your organization's needs. The [Terminology](#) topic has more information.

Assets entries can have the following entry fields (depending upon how the entry fields are configured: see the [Asset Entry Fields](#) topic for more information):

Property	Description
Date	The date of the entry. This is the date the asset was used, for instance. This field is required.
ID	A unique ID for identifying this entry. If the field is not entered by the employee than a value is automatically generated.
Asset	<p>The asset associated with this entry. The selected asset will determine:</p> <ul style="list-style-type: none"> • The unit of measure for the quantity field, e.g. Gallons or Kilometers. • The number of digits to the right of the decimal point that can be entered for the quantity field. • The unit cost, which can be overridden if the Unit Cost or Total Cost fields are allowed entry. • The unit price, which can be overridden if the Unit Price or Total Price fields are allowed entry. <p>To learn more about setting up assets refer to the Assets topic.</p>
Quantity	The amount of the asset used for this entry, in whatever units the asset's unit of measure indicates. Note that negative values are allowed as a way to make corrections to entries that are locked and therefore not editable.
Description	A description for this entry, up to 255 characters. For larger text input you can also use the Notes field.
Unit Cost	<p>The unit cost for the asset used by this entry. Cost is what you pay for this asset, as opposed to price, which is what you charge for this asset. The value will default to the unit price of the selected asset.</p> <p>Note that you can optionally allow this value to overridden if you make this field editable (see the Asset Entry Fields topic for more information).</p>

Total Cost	<p>The total cost for this entry, computed as the quantity times the unit cost. Cost is what you pay for this asset, as opposed to price, which is what you charge for this asset.</p> <p>Note that you can optionally allow this value to overridden if you make this field editable (see the Asset Entry Fields topic for more information). If this value is overridden then a new unit cost will be computed for the entry as the total cost divided by the quantity.</p>
Unit Price	<p>The unit price for the asset used by this entry. Price is what you charge for this asset, as opposed to cost, which is what you pay for this asset. The value will default to the unit price of the selected asset.</p> <p>Note that you can optionally allow this value to overridden if you make this field editable (see the Asset Entry Fields topic for more information).</p>
Total Price	<p>The total price for this entry, computed as the quantity times the unit price. Price is what you charge for this asset, as opposed to cost, which is what you pay for this asset.</p> <p>Note that you can optionally allow this value to overridden if you make this field editable (see the Asset Entry Fields topic for more information). If this value is overridden then a new unit price will be computed for the entry as the total price divided by the quantity.</p>
Notes	<p>Notes for this entry, up to 4,000 characters (2,000 for Oracle databases). Use this for longer information about the entry, as opposed to the description field, which has a limit of 255 characters.</p>
Employee	<p>The employee to associate with this entry. By default it is set to the employee who created the entry.</p> <p>Note that you can optionally allow this value to overridden if you make this field editable (see the Asset Entry Fields topic for more information).</p>
Reporting Group	<p>The group to associate with this entry. By default it is set to the reporting group of the employee who created the entry. Reporting Group is a terminology item and can be changed to "Cost Center", "Department", "Crew", etc. The Terminology topic has more information.</p> <p>Note that you can optionally allow this value to overridden if you make this field editable (see the Asset Entry Fields topic for more information).</p>
Customer/Project/Task	<p>You can enter a value for the work breakdown structure (WBS) for this entry. For more information on see the Work Breakdown Structure topic.</p> <p>Note that you can have the employee input as many or as few of the WBS levels as you like by editing which fields are allowed for entry (see the Asset Entry Fields topic for more information).</p>

Custom Fields	You can have any number of custom fields that can be entered by the employee. To add new custom fields select the Custom Fields option on the More menu (see the Custom Fields topic for more information).
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Asset Entry Fields

You can customize the list of fields that are entered for each type of asset entry. This gives you great flexibility in setting up entry templates that are different for each asset type, such as equipment, materials or expenses. In addition to which fields are shown, you can also specify the access level for individual fields. For instance, you can have some fields, such as price or cost fields, that are only editable by managers.

Note: You can add to the list of available entry fields by selecting the Custom Fields option from the More menu (see the [Custom Fields](#) for more information). Once you have added your custom fields you will need to go back to the Asset Entry Fields page to enable them.

Asset entry fields have the following properties:

Property	Description
Enabled	If checked the field is enabled and can be shown or edited.
Access	The default access level or permission for this field: hidden, read-only or editable.
Access Exceptions	Access exceptions allow you to override the default access for specific employee permission levels. For instance, you may have cost fields hidden from all users by default, but allow managers and administrators to see and edit these fields.
Required	If checked then a value for this field is required. Entries will not be able to be saved or submitted until a value is provided.
New Group	If checked then this field denotes the start of a new group of fields. This is a cosmetic setting to help group related fields together: a dividing line will be inserted before this field to separate it from previous fields.
Detail	If checked then this field will be considered a detail and not shown in lists of entries. Instead you will need to drill into the listed entry (or click the details button) to see the field. Check this setting for fields that are only infrequently entered and to prevent entry lists from becoming too wide.

Reordering Fields

You can specify the order in which the fields appear by clicking the Edit button on the Entry Fields page, then clicking and dragging each row to move it where you like.

Assets

Assets are the definitions or profiles of the materials, equipment, etc. you are tracking. Assets can be broadly divided into user-defined types, such as equipment, materials or expenses (see the [Asset Types](#) topic for more information). Assets can be further divided into user-defined classes, for example equipment assets may be classified by Truck, Auto, etc. (see the [Asset Classes](#) topic for more information).

Assets define what you keep track of, whereas Asset Entries are used to track the actual usage of these assets. For example, you may have a material asset named 'Gravel', and an asset entry that indicates how much gravel a crew used on a particular date. See the [Asset Entries](#) topic for more information.

Note: You can change the terminology 'Asset' to suit your organization's needs. The [Terminology](#) topic has more information.

Assets have the following properties:

Property	Description
Name	The asset name, up to 80 characters. A value is required and must be unique for all assets (regardless of the asset type).
Description	A description for the asset, up to 255 characters.
ID	The asset ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all assets (regardless of the asset type). This is commonly used for synchronizing with external systems, such as billing or accounting.
Status	The asset status, either Active or Inactive. Setting the status to inactive will prevent the recording of any further asset entries for this asset. Note that you cannot delete assets that have asset entries associated with them, and in those cases you will instead make the asset inactive to prevent its further use.
Class	The asset class (optional). Asset classes are configured on the Assets > Asset Class page (see the Asset Classes topic for more information).
Unit of Measure	The unit of measure for this asset (optional). Units of measure are configured on the Assets > Units of Measure page (see the Units of Measure topic for more information).
Units Decimal Digits	The number of decimal digits of precision for entries for this asset. It will default to the "Default Decimal Digits" property for the selected unit of measure, but you can override this.
Unit Cost	The unit cost of this asset, per unit of measure. Cost is what you pay for this asset, as opposed to price, which is what you charge for this asset. Unit cost is used to compute the total cost of entries using this asset. Note that you can optionally allow entries to override this unit cost if you allow the entry's Unit Price or Total Price fields to be editable (see the Asset Entry Fields topic for more information).

Unit Price	<p>The unit price of this asset, per unit of measure. Price is what you charge for this asset, as opposed to cost, which is what you pay for this asset. Unit price is used to compute the total price of entries using this asset.</p> <p>Unit price can be either a fixed value, or can be computed. The following options are available:</p> <table border="1" data-bbox="488 454 1362 1055"> <tr> <td data-bbox="488 454 676 528">Fixed Price</td> <td data-bbox="676 454 1362 528">The unit price is a fixed value: it does not change based on the unit cost.</td> </tr> <tr> <td data-bbox="488 528 676 759">Markup</td> <td data-bbox="676 528 1362 759"> <p>The unit price is computed from the unit cost as a percent markup:</p> <p>Unit Price = Unit Cost * (1 + Markup)</p> <p>For example, if the markup is 50% and the unit cost is \$10.00, then the unit price will be \$15.00.</p> </td> </tr> <tr> <td data-bbox="488 759 676 1055">Margin</td> <td data-bbox="676 759 1362 1055"> <p>The unit price is computed from the unit cost to give you a percent margin:</p> <p>Unit Price = Unit Cost / (1 - Margin)</p> <p>For example, if the margin is 50% and the unit cost is \$10.00, then the unit price will be \$20.00. As you can see from the equation, the margin can never be 100% or greater.</p> </td> </tr> </table> <p>Note that you can optionally allow entries to override this unit price if you allow the entry's Unit Price or Total Price fields to be editable (see the Asset Entry Fields topic for more information).</p>	Fixed Price	The unit price is a fixed value: it does not change based on the unit cost.	Markup	<p>The unit price is computed from the unit cost as a percent markup:</p> <p>Unit Price = Unit Cost * (1 + Markup)</p> <p>For example, if the markup is 50% and the unit cost is \$10.00, then the unit price will be \$15.00.</p>	Margin	<p>The unit price is computed from the unit cost to give you a percent margin:</p> <p>Unit Price = Unit Cost / (1 - Margin)</p> <p>For example, if the margin is 50% and the unit cost is \$10.00, then the unit price will be \$20.00. As you can see from the equation, the margin can never be 100% or greater.</p>
Fixed Price	The unit price is a fixed value: it does not change based on the unit cost.						
Markup	<p>The unit price is computed from the unit cost as a percent markup:</p> <p>Unit Price = Unit Cost * (1 + Markup)</p> <p>For example, if the markup is 50% and the unit cost is \$10.00, then the unit price will be \$15.00.</p>						
Margin	<p>The unit price is computed from the unit cost to give you a percent margin:</p> <p>Unit Price = Unit Cost / (1 - Margin)</p> <p>For example, if the margin is 50% and the unit cost is \$10.00, then the unit price will be \$20.00. As you can see from the equation, the margin can never be 100% or greater.</p>						
Notes	Notes about this asset, up to 2000 characters.						

Asset Classes

Asset classes allow you to organize your assets into logical groupings. For example, given an asset type of Equipment you might create classes such as "Truck", "Auto", etc. Once you have defined your asset classes you can select them when editing asset properties (see the [Assets](#) topic for more information).

Asset classes have the following properties:

Property	Description
Name	The asset class name, up to 80 characters. A value is required and must be unique for all classes (regardless of the asset type).
Description	A description for the asset class, up to 255 characters.
ID	The asset class ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all asset classes (regardless of the asset type). This is commonly used for synchronizing with external systems, such as billing or accounting.
Status	The asset class status, either Active or Inactive. Setting the status to inactive will prevent its use when editing assets. Note that you cannot delete an asset class if there are assets that use it, and in those cases you will instead make the asset class inactive to prevent its further use.

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Asset Types

Asset types are designed to be used for very broad categories of assets, e.g. Material, Equipment or Expenses. There is no hard limit to the number of asset types you can create, but keep in mind that each asset type can optionally have a tab on the timesheet, so you generally want to limit the number to less than 10.

Asset types have the following properties:

Property	Description
Name	The asset type name, up to 40 characters. A value is required and must be unique.
Plural Name	The plural name of the asset type, up to 40 characters. A value is required and must be unique.
Description	A description for the asset type, up to 255 characters.
ID	The asset type ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all asset types. This is commonly used for synchronizing with external systems, such as billing or accounting.
Status	The asset class status, either Active or Inactive. Note that you cannot delete an asset type if there are assets, classes, etc. that use it. In those cases you will instead make the asset type inactive to prevent its further use.

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Units of Measure (UoM)

Units of measure (UoM) define the type of quantity that is entered for assets. Once you have defined your units of measure you can select them for your assets from the asset properties page (see the [Assets](#) topic for more information).

Units of measure have the following properties:

Property	Description
Name	The unit of measure name, up to 40 characters. A value is required and must be unique.
Abbreviation	The abbreviation for the unit of measure, up to 10 characters. If not specified it will be set to the name (up to the first 10 characters). The abbreviation is what is generally shown to end users when entering data, running reports, etc.
Description	A description for the unit of measure, up to 255 characters.
ID	The unit of measure ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all units of measure. This is commonly used for synchronizing with external systems, such as billing or accounting.
Status	The unit of measure status, either Active or Inactive. Note that you cannot delete a unit of measure if there are assets or asset entries that use it. In those cases you will instead make the unit of measure inactive to prevent its further use.
Default Decimal Digits	The default number of decimal digits (digits to the right of the decimal point) to allow when entering quantities using this unit of measure. This value is used when editing assets: whenever a new selection is made for an asset's unit of measure the asset's decimal digits value will be set to this default value. A value of 0 (zero) means only whole numbers can be entered.

Employees

You need to create an employee account for each user that needs to record time or log into Pacific Timesheet. Employee accounts are where you specify the login name, email address, timesheet template and other properties.

Note: You can change the terminology for 'Employee' to suit your organization's needs. The Terminology topic has more information.

Employee accounts have the following properties:

Property	Description
Login Name	<p>The employee login name. This is required, and must be a unique value up to 80 characters. The login name is NOT case-sensitive.</p> <p>Note: If you are integrating with an LDAP server or an Active Directory server then you will want this value to match the login name used for those accounts. See the Security help topic for more details.</p>
Password	<p>The employee password, up to 40 characters. The password IS case-sensitive. The complexity of the password is controlled by application's security settings. See the Security help topic for more details.</p> <p>Note: If you are integrating with an LDAP server or an Active Directory server then the employee will use the password configured in those accounts. See the Security help topic for more details.</p>
First Name	The employee's first name, up to 80 characters.
Last Name	The employee's last name. This field is required and can be up to 80 characters.
ID	The employee ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all employees. The value here is commonly used when synchronizing with external systems such as payroll processing.
Status	<p>The employee status, either Active, Inactive or Locked.</p> <p>Note: Accounts can become automatically locked after too many unsuccessful login attempts in a short period of time. See the Security help topic for more details.</p> <p>Note: Locked or inactive employee accounts are not counted when checking your Pacific Timesheet license to see if you have reached your maximum number of employee accounts. You can have as many Locked or Inactive employees as you require. For instance, when an employee leaves the company you will generally just change their status to Inactive so that you can retain their historical information, rather than deleting the employee account.</p>
Last Login	This is a read-only field showing the date and time of the employee's last successful login.

Permission Level	<p>The permission level determines the maximum permissions an employee has for the application. The exact permissions may depend upon which objects a user is assigned to, and the permission level they have for that object. For example, an employee may be given a default permission level of Manager, but will not be able to manage a project unless they are assigned to it and given the role of Manager for that project.</p> <p>When editing an employee, the list of permission levels will be limited to only active permission levels. This list will be further limited depending upon the default permission level of the logged-in user. For instance, an Administrator will see the full list of active permission levels, whereas a Manager will not see the Administrator role as it is considered to have a higher security level.</p> <p>For more information on permission levels see the Security help topic.</p>
Employee Type	<p>The type of employee, for example Non-exempt, Exempt, Hourly, Salaried, etc. This property is essentially a label used for categorizing your various types employees. The list of employee types can be customized from the General page under the System tab.</p>
Policy	<p>The policy for this employee. Policies are sets of rules affecting time entry, leave balances, overtime handling, etc. and are managed from the Policies page under the System tab.</p>
Job Title	<p>The optional job title for this employee, up to 80 characters.</p>
Reporting Group	<p>The primary or reporting group for this user. This group will be the default group associated with employee's time and asset entries. For instance, whenever an employee saves their timesheet, the employee's current reporting group value will be stored with each time entry.</p> <p>Note: Reporting Group can be thought of as Division, Cost Center, Charge Code, etc. depending upon your organization. You can rename 'Reporting Group' from the Terminology page under the System tab.</p>
First Day	<p>The first day of employment. Specifying a value can be important for several reasons:</p> <ul style="list-style-type: none"> - The employee will not be allowed to enter time for dates prior to their First Day value. - The employee will not be allowed to submit leave requests for dates prior to their First Day value. - This value will affect balance accruals that vary based on the years employed (see the Balance and Accrual Rules topic for more information).
Last Day	<p>The last day of employment. The employee will not be allowed to enter time for dates after to this date. It is good practice to set this value when inactivating an employee.</p>

<p>Scheduled Work Days</p>	<p>The days of the week the employee is scheduled to work, for example Monday-Friday. Specifying a value can be important for several reasons:</p> <ul style="list-style-type: none"> - Holidays, when automatically added to timesheets, will only put hours on days marked as a work day. See the Schedule Rules topic for more information. - Leave requests, when added to timesheets after approval, will only put hours on days marked as a work day. See the Schedule Rules topic for more information. - Time entry rules that require a minimum number of hours each work day will only check on days marked as a work day. See the Time Entry Rules topic for more information.
<p>Scheduled Hours</p>	<p>The number of hours the employee is scheduled to work each week and each work day. The scheduled hours values affect the following areas of the system:</p> <ul style="list-style-type: none"> - When leave requests and holidays are automatically added to the employee's timesheet the Scheduled Hours Per Day will be used to determine how many hours to put on the timesheet. If no value is specified, the Hours Per Day property on the System > General page is used. See the Schedule Rules help topic for more information on how holidays and leave requests can be configured to be automatically added to timesheets. - The scheduled hours value is used when displaying how many days of balance are available on the employee's home page. If no value is specified, the Hours Per Day property on the System > General page is used. - Percent Time Entry timesheets need the Scheduled Hours Per Week value in order to convert percentages to hours. See the Templates topic for more information on timesheet templates.
<p>Scheduled Start</p>	<p>The time of day the employee is scheduled to start work or "punch in". The scheduled start time affects the following areas of the system:</p> <ul style="list-style-type: none"> - Employee lateness is determined based on the scheduled start value, and can trigger the sending of an email notice. See the Notices topic for information about sending late email notices. - When adding a new row to an attendance timesheet (one that has start and finish times) the start time will default to the employee's scheduled start time. - If you configure rounding rules to round punches to the scheduled start time then you will need to specify the employee's scheduled start time. See the section on rounding in the Time Entry Rules help topic for more information. - If you are keeping track of absence points you will need to specify the scheduled start time. See the Absence Points Rules help topic for more information.

Scheduled Finish	<p>The time of day the employee is scheduled to finish work or "punch out". The scheduled finish time affects the following areas of the system:</p> <ul style="list-style-type: none"> - If you configure rounding rules to round punches to the scheduled finish time then you will need to specify the employee's scheduled finish time. See the section on rounding in the Time Entry Rules help topic for more information. - If you are keeping track of absence points you will need to specify the scheduled finish time. See the Absence Points Rules help topic for more information.
Email	The email address, up to 80 characters.
Phone	The phone number, up to 40 characters.
Mobile	The mobile phone number, up to 40 characters.
Fax	The fax number, up to 40 characters.
Timesheet Template	<p>The timesheet template for this employee. Different employees can have different timesheet templates, for example hourly workers may use a template that has fields for tracking their in and out times on specific tasks, whereas salaried workers might use a template that only requires tracking the total hours spent on each task. Timesheet templates are managed from the Templates page under the System tab.</p> <p>A blank value is allowed for the timesheet template, but the employee will not get a "My Timesheet" tab when they log in to the application. This may be desired in some cases, such as for an administrative account, or an employee who needs to log into the application to review and run reports on other employee's timesheets, but does not need record their own time.</p>

<p>Timesheet Memory</p>	<p>New timesheets are created at midnight of the start of every new time period. The timesheet memory setting allows you to specify whether rows and hours are carried forward from the previous timesheet period when the new timesheet is created. This can make it easier for your employees to track their time if they commonly work on the same tasks as appropriate rows will already be on the timesheet.</p> <p>The following timesheet memory options are available:</p> <table border="1" data-bbox="456 454 1367 927"> <tr> <td data-bbox="456 454 679 656">None</td> <td data-bbox="686 454 1367 656">New timesheets will be blank: no rows or hours will be carried forward from the previous time period. Note that even if no rows or hours are carried forward from the previous period, the application will still keep track of recently used projects, tasks, materials, etc. in order to facilitate data entry.</td> </tr> <tr> <td data-bbox="456 665 679 790">Rows</td> <td data-bbox="686 665 1367 790">New timesheets will have the same rows as the timesheet for the previous period, but all hours fields will be blank. This is the default value for employees.</td> </tr> <tr> <td data-bbox="456 799 679 927">Rows and Hours</td> <td data-bbox="686 799 1367 927">New timesheets will have the same rows and hours as the timesheet for the previous period. Only work hours are carried forward - leave (or paid time off) rows will carry forward, but not the hours.</td> </tr> </table> <p>Regardless of the timesheet memory setting, employees can manually copy a previous timesheet via an option in the Tools menu on their timesheet. You can hide this option from employees by turning off the "Can copy previous timesheet hours" timesheet permission for the employee's permission level. See the Permission Levels topic for more information.</p>	None	New timesheets will be blank: no rows or hours will be carried forward from the previous time period. Note that even if no rows or hours are carried forward from the previous period, the application will still keep track of recently used projects, tasks, materials, etc. in order to facilitate data entry.	Rows	New timesheets will have the same rows as the timesheet for the previous period, but all hours fields will be blank. This is the default value for employees.	Rows and Hours	New timesheets will have the same rows and hours as the timesheet for the previous period. Only work hours are carried forward - leave (or paid time off) rows will carry forward, but not the hours.
None	New timesheets will be blank: no rows or hours will be carried forward from the previous time period. Note that even if no rows or hours are carried forward from the previous period, the application will still keep track of recently used projects, tasks, materials, etc. in order to facilitate data entry.						
Rows	New timesheets will have the same rows as the timesheet for the previous period, but all hours fields will be blank. This is the default value for employees.						
Rows and Hours	New timesheets will have the same rows and hours as the timesheet for the previous period. Only work hours are carried forward - leave (or paid time off) rows will carry forward, but not the hours.						
<p>Hours Format</p>	<p>The choice of how the employee enters hours, either decimal format (for example 7.50) or hours:minutes (for example 7:30).</p> <p>Note: This setting does not affect the time format - whether a 12 or 24 hour clock is used is determined by the employee's locale setting.</p>						
<p>Locale</p>	<p>The locale is a geographic/language region that determines the following:</p> <ul style="list-style-type: none"> • The language displayed, e.g. English, French, Spanish, etc. • The formatting of dates and times. Note that in locations that use 12 hour time (e.g. the United States) you can optionally override the locale preference and use 24 hour time. The employee can change this on their Home > Preferences page. • The formatting of numbers • The list of company holidays for the selected location. Holidays can be configured to only apply to employees in specific time zones. See the Holidays help topic for more information. <p>Note: The application will always assume the employee is in this locale, rather than pick up the locale from the browser, for instance.</p>						
<p>Time Zone</p>	<p>The employee's time zone. When timesheet data is saved it will be relative to this time zone.</p> <p>Note: The application will always assume the employee is in this time zone, rather than pick up the time zone from the browser, for instance.</p>						

Default Bill Rate	The default bill rate. The rate can be specified as either a named rate or a custom numeric value. Named rates are configured from the Rate Options page. The current bill rate, if non-zero, is used when a timesheet is saved to compute the bill amount for each time entry.
Default Pay Rate	The default pay rate. The rate can be specified as either a named rate or a custom numeric value. Named rates are configured from the Rate Options page. The current pay rate, if non-zero, is used when a timesheet is saved to compute the pay amount for each time entry.
Salary	<p>The annual salary for non-hourly employees. The salary, if non-zero, is used to compute an effective pay rate when a timesheet is submitted. You should therefore only specify a pay rate or a salary, not both. If both are specified the pay rate is used and the salary ignored.</p> <p>Note that the effective pay rate is based on the total hours for the timesheet period. Since the total hours is only accurate when the timesheet is submitted, the effective pay rate is not computed until the timesheet is submitted. You can also have the effective pay rate computed before a submit by specifying the 'Scheduled Hours' property. Then, when a timesheet is saved (but not submitted) the scheduled hours will be used instead of the total hours on the timesheet to give an approximate effective pay rate. Once the timesheet is submitted, however, the total hours will be used to give an accurate effective pay rate.</p>
Approver	<p>This is the primary approver for the employee. A primary approver can review and approve or reject this employee's time entries and leave requests (depending upon the approver's permission level).</p> <p>Primary approvers can also receive email reminders and notices when there are timesheets or requests that need approving, or when employees are late submitting their time. See the Notices help topic for more information.</p> <p>Note: Only employees with permission to approve will appear in the list of possible approvers. If you do not see an employee in the list then you may need to change that employee's permission level, or enable the appropriate approval permission for their permission level. See the Security help topic for more information.</p>
Approver Backup	This is the backup approver for this employee. The backup approver has the same capabilities as the primary approver, but will not receive the approval email notices that are sent to the primary approver. It is a good idea to assign a backup approver for times when the primary approver is away or otherwise unavailable.

Notes

Clicking the Notes disclosure triangle allows you to review and enter notes about the employee (up to 2000 characters).

Current Balances

Clicking the Current Balances disclosure triangle shows the list of current balances for the employee. You can edit employee balances by clicking the current balance link. The Employee Balances topic has more information. Note that employee balances cannot be edited unless your Permission Level has the "Can edit advanced properties" Employee permission checked.

Group Membership

Clicking the Group Membership disclosure triangle shows the list of groups the employee is a member of. The Employee Groups topic has more information about managing groups.

Calendar

Clicking the Calendar disclosure triangle shows the employee's calendar of holidays, leave requests and other events.

Importing/Exporting Employees

You can import and export employee data using CSV (Comma Separated Values) format files from the Employees tab. When importing data a good way to start is to do an export first - this will generate a file you can use as a template. Once you modify this file (including removing unnecessary columns) to have your new data you can then import it back into the application. See the Employee CSV Format help topic for more information on the import file format.

Note: The default format is CSV but you can change this from the Home > Preferences page.

Importing/Exporting Employee Balances

You can import and export employee balance data using CSV (Comma Separated Values) format files from the Employees tab. When importing data a good way to start is to do an export first - this will generate a file you can use as a template. Once you modify this file (including removing unnecessary columns) to have your new data you can then import it back into the application. See the Employee Balances CSV Format help topic for more information on the import file format.

Note: The default format is CSV but you can change this from the Home > Preferences page.

Custom Fields

Like all major objects in the application, you can customize them by creating new fields. Choosing the 'Manage Custom Fields' option on the Employees tab will let you create a variety of new fields or properties specific to your needs.

Related Topics

- Employee Balances
- Employee Groups

Employee Balances

Employee balances are banks of hours that employees can accrue and use on their timesheets, such as Vacation, Sick or Flex-time. Balances are associated with leave pay codes: for instance if you have a Vacation pay code you can optionally have a Vacation balance (see the [Pay Codes](#) topic has more information). Each balance can have its own set of rules for how hours are accrued and how situations such as when the employee's balance goes negative are handled. See the [Balance and Accrual Rules](#) help topic for more information.

You can update an employee's balance from the [Employee Details](#) page by clicking the **Current Balances** disclosure triangle, which shows the employee's balances as of the current date. Clicking on the current balance link will load the **Balance History** page. The Balance History page lists all changes made to the balance: the actual balance for any given date is simply the total of all the balance changes up to that date. If you have appropriate permissions you can modify the balance by adding, deducting or setting the balance for a given date.

Note: In order to change an employee's balance you must have the 'Can edit advanced properties' Employee permission. In addition, for security purposes, you can only delete balance changes that you made. Only administrators (those with the 'Can manage all' Employee permission) can delete balance changes made by others.

Making Bulk Changes To Employee Balances

If you need to update balances for a number of employees you can import the list of changes using an import file. When importing data a good way to start is to export the current employee balances via the Export Employee Balances option on the Employees tab - this will generate a file you can use as a template. Once you modify this file (including removing unnecessary columns) to have your new data you can then import it back into the application. The [Managing Employees](#) topic has more information.

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Employee Groups

Employee Groups are lists of employees, and can be used for several purposes. You can create employee groups that represent cost centers or divisions, for instance. These can then be assigned to the appropriate employees as their **Reporting Group** (see the [Managing Employees](#) help topic for more information). In addition, groups are used by Pacific Timesheet for managing application permissions. For instance, rather than assigning managers to specific employees you give the manager permission for a specific employee group (the [Security](#) help topic has more information about configuring permissions).

Employee groups have the following properties:

Property	Description
Name	The group name, up to 80 characters. A value is required and must be unique for all groups.
Description	A description for the group, up to 255 characters.
ID	The group ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all groups. The value here is commonly used when synchronizing with external systems such as payroll processing.
Status	The group status, either Active or Inactive. You can delete a group, but often it is preferable to change its status to Inactive. This will keep it from being used for new data entry, but allow it to be reported on for historical purposes.

Notes

Clicking the Notes disclosure triangle allows you to review and enter notes about the group (up to 2000 characters).

Employees

Clicking the Employees disclosure triangle allows you to review and edit the list of employees belonging to this group. An employee can be in more than one group at the same time. If you want to check if an employee belongs to more than one group you can view their group membership on the specific employee's properties page.

Permissions

Clicking the Permissions disclosure triangle allows you to review and edit which employees or employee groups have been given special permissions for this group. Typically you would use this to assign an employee manager (someone with 'Can manage limited' Employee permission) to this group in order to review and edit time or asset entries for employees who are members of this group. See the [Security](#) help topic for more information.

Importing/Exporting Groups

You can import and export group data using CSV (Comma Separated Values) format files from the Employees > Groups page. When importing data a good way to start is to do an export first - this will generate a file you can use as a template. Once you modify this file (including removing unnecessary columns) to have your new data you can then import it back into the application. See the [Group CSV Format](#) help topic for more information on the import file format.

Note: The default format is CSV but you can change this from the Home > Preferences

page.

Custom Fields

Like all major objects in the application, you can customize them by creating new fields. Choosing the 'Manage Custom Fields' option on the Employees > Groups page will let you create a variety of new fields or properties specific to your needs.

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Reports

Pacific Timesheet supports over 50 different reports. Reports are customizable, allowing you to:

- Alter which data columns are displayed
- Alter the names of the data columns
- Alter data sorting
- Alter data filtering
- Publish your customized reports for other employees to use

In addition, all reports can be output in HTML, PDF, CSV and Excel formats.

Timesheet Reports

Report	Description
Employee Hours	This report summarizes timesheet hours by employee. You can expand this report to further group hours by: <ul style="list-style-type: none"> • Pay Code • Project • Project Group • Reporting Group • Task • Task Group
Pay Code Hours	This report summarizes timesheet hours by pay code. You can expand this report to further group hours by: <ul style="list-style-type: none"> • Employee • Project • Project Group • Reporting Group • Task • Task Group
Project Group Hours	This report summarizes timesheet hours by project group. You can expand this report to further group hours by: <ul style="list-style-type: none"> • Employee • Pay Code • Project • Reporting Group • Task • Task Group
Project Hours	This report summarizes timesheet hours by project. You can expand this report to further group hours by: <ul style="list-style-type: none"> • Employee • Pay Code • Project Group • Reporting Group • Task • Task Group

Reporting Group Hours	This report summarizes timesheet hours by reporting group. You can expand this report to further group hours by: <ul style="list-style-type: none"> • Employee • Pay Code • Project • Project Group • Task • Task Group
Task Group Hours	This report summarizes timesheet hours by employee. You can expand this report to further group hours by: <ul style="list-style-type: none"> • Employee • Pay Code • Project • Project Group • Reporting Group • Task
Task Hours	This report summarizes timesheet hours by employee. You can expand this report to further group hours by: <ul style="list-style-type: none"> • Employee • Pay Code • Project • Project Group • Reporting Group • Task Group
Timesheet Details	This report lists time entry details for a given date range. As there are many time entry fields available to report on, you will probably want to generate a custom version of this report to show only the information you are interested in.

Employee Reports

Report	Description
Employee Attendance	This report lists employees and the time they punched in.
Employee Details	This report lists employee details, such as email, phone numbers, etc.

System Reports

Report	Description
Audit Trail	This report lists audit events for the given date range.
Logins	This report lists employee logins (successful and unsuccessful) for the given date range.

Report Properties

When creating or editing reports you can set the following properties:

Property	Description
Name	The report name or title, up to 80 characters.

Description	A description for the report, up to 255 characters.
Template	A read-only property that indicates which report was used as the template for creating this report.
Published	<p>If checked then this report can be run by other employees. You can limit which employees can access a published report by clicking the button to the right of the check box and selecting the appropriate permission levels.</p> <p>Publishing a report does not allow others to edit it - only the employee who created the report can subsequently edit it.</p>
Page Size	The page size for the report. Reports are designed for easy and accurate printing, and this setting will determine how reports are paginated.
Orientation	The page orientation for printing, either Portrait or Landscape. For reports with many columns you will generally want to specify Landscape orientation.
Reporting Period	The default time period for the report. The reporting period can be overridden when running the report.
Report Columns	The list of data columns to display on the report. In addition to being able to add or remove any columns you like, you can also edit the column heading.
Sort Columns	The list of data columns to use for sorting. You can have multiple sort columns, and sorting can be ascending or descending.

Subtotal Columns

You can optionally show subtotals for any of the report columns (except for decimal or float columns, as subtotalling for these types of columns would not make sense). Subtotals will break up the report into sections with a subtotal for each specified subtotal column. You can have multiple subtotal columns if needed, but you may only choose from columns that are specified in the Report Columns property.

As an example, suppose your data looked like this with no subtotal columns specified:

Employee	Project	Task	RT	OT
Johnson, B.	P1	T1	8.00	1.50
Johnson, B.	P1	T1	8.00	0.00
Johnson, B.	P2	T2	8.00	0.00
Johnson, B.	P2	T2	8.00	0.00
Swayze, P.	P1	T1	8.00	0.00
Swayze, P.	P1	T2	8.00	2.00
Total			48.00	3.50

If you specified Employee.Name as the subtotal field then your report would look like this:

Employee	Project	Task	RT	OT
Johnson, B.	P1	T1	8.00	1.50
Johnson, B.	P1	T1	8.00	0.00
Johnson, B.	P2	T2	8.00	0.00
Johnson, B.	P2	T2	8.00	0.00
Subtotal for Johnson, B.:			32.00	1.50
Swayze, P.	P1	T1	8.00	0.00
Swayze, P.	P1	T2	8.00	2.00
Subtotal for Swayze, P.:			16.00	2.00
Total			48.00	3.50

If you also wanted to see subtotals for projects you would add the Project.Name column to the list of subtotal columns.

Employee Filter	<p>If non-empty then the report will only show data for the Employees in the list. You can override this value when running the report.</p> <p>In addition to specifying individual employees, you can also specify the following special employee filter values:</p> <table border="1" data-bbox="475 389 1393 927"> <thead> <tr> <th data-bbox="475 389 703 434">Filter</th> <th data-bbox="703 389 1393 434">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="475 434 703 633">(Self)</td> <td data-bbox="703 434 1393 633">When you add "(Self)" to the Employee Filter only data for the currently logged-in employee will be shown (any other employees in the Employee Filter will be ignored). This is useful for allowing employees to run reports on only their own time entries.</td> </tr> <tr> <td data-bbox="475 633 703 927">(Approvees)</td> <td data-bbox="703 633 1393 927">When you add "(Approvees)" to the Employee Filter only data for employees that the currently logged-in employee is an approver of will be shown (any other employees in the Employee Filter will be ignored). This is useful for allowing approvers to run reports on just employees they can approve. An approvee is any employee that the logged-in user is set as a primary approver of in the employee's profile.</td> </tr> </tbody> </table>	Filter	Description	(Self)	When you add "(Self)" to the Employee Filter only data for the currently logged-in employee will be shown (any other employees in the Employee Filter will be ignored). This is useful for allowing employees to run reports on only their own time entries.	(Approvees)	When you add "(Approvees)" to the Employee Filter only data for employees that the currently logged-in employee is an approver of will be shown (any other employees in the Employee Filter will be ignored). This is useful for allowing approvers to run reports on just employees they can approve. An approvee is any employee that the logged-in user is set as a primary approver of in the employee's profile.
Filter	Description						
(Self)	When you add "(Self)" to the Employee Filter only data for the currently logged-in employee will be shown (any other employees in the Employee Filter will be ignored). This is useful for allowing employees to run reports on only their own time entries.						
(Approvees)	When you add "(Approvees)" to the Employee Filter only data for employees that the currently logged-in employee is an approver of will be shown (any other employees in the Employee Filter will be ignored). This is useful for allowing approvers to run reports on just employees they can approve. An approvee is any employee that the logged-in user is set as a primary approver of in the employee's profile.						
Reporting Group Filter	If non-empty then the report will only show data for the Groups in the list. You can override this value when running the report.						
Pay Code Filter	If non-empty then the report will only show data for the Pay Codes in the list. You can override this value when running the report.						
Project Group Filter	If non-empty then the report will only show data for the Project Groups in the list. You can override this value when running the report.						
Project Filter	If non-empty then the report will only show data for the Projects in the list. You can override this value when running the report.						
Task Group Filter	If non-empty then the report will only show data for the Task Groups in the list. You can override this value when running the report.						
Task Filter	If non-empty then the report will only show data for the Tasks in the list. You can override this value when running the report.						

Reporting on Archived Data

Older time entry and asset entry data will eventually be moved into archival storage. You can still report on archived data if you need to (e.g. for auditing purposes, etc.) by altering the report's "Archive Settings" to target the archived data storage tables. The [Data Archival](#) topic has more information on how the system archives data.

Advanced Topics

Advanced Topics

Administration covers more advanced configuration settings, such as security settings and customization.

Related Topics

- [System Settings](#)
- [Pay Codes](#)
- [Templates](#)
- [Policies](#)
- [Security](#)
- [Notices](#)
- [Devices](#)
- [Schema](#)
- [Custom Fields](#)
- [Importing/Exporting](#)
- [Data Archival](#)

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Administrative Overview

If you are setting up your timesheet system for the first time, the following settings should be configured first:

- Week Start
- Default Time Zone
- Email Reply Address

These can be set on the [System Settings](#) page. These can be changed at any time, but it is a best-practice to define these before you start creating new employees.

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System Settings

System Settings

The System page allows you to control application-wide settings, and is only accessible by employees with a permission level that allows them to edit system settings, such as Administrator. The following properties can be set:

Property	Description						
Default Week Start	The default first day of the week, for instance Sunday or Monday. This is the default value for employees, but you can have as many different time periods with different week starts as needed by your organization. For instance, one group of employees could use a timesheet template that has a period starting on Sunday, while another group could use a template that starts on Monday. See the Time Periods help topic for more information on time periods, and the Templates help topic for more information on timesheet templates.						
Default Hours Per Day	The default number of work hours in a day. This value is used when putting leave and holidays on timesheets. In addition, this value is used when displaying how many days of balance are available on the employee's home page. This is the default value, but you can override this value for each employee by setting the Scheduled Hours Per Day property on each employee's profile. See the Managing Employees help topic for more information.						
Default Locale	The default locale for new employees. A locale is a language/country combination that determines the formatting of dates, currency and numbers. All diagnostic and audit log information is formatted using the default locale, too.						
Default Time Zone	The default time zone for new employees.						
Base Currency	Base currency for application. This is used when displaying or prompting for currency amounts.						
Outgoing Email (SMTP) Server	The host name or IP address of your outgoing email server. Specify a value here in order to enable the application to send email notifications such as timesheet events or forgotten password requests. <i>Self-hosted version only.</i>						
Port	The port number for your SMTP server. The default is 25.						
Security	If your SMTP server is using connection security you will need to select the appropriate value here. Your options are: <table border="1" data-bbox="651 1713 1374 1848"> <tbody> <tr> <td>None</td> <td>No connection encryption</td> </tr> <tr> <td>TLS</td> <td>Transport Layer Security encryption</td> </tr> <tr> <td>SSL</td> <td>Secure Socket Layer encryption</td> </tr> </tbody> </table>	None	No connection encryption	TLS	Transport Layer Security encryption	SSL	Secure Socket Layer encryption
None	No connection encryption						
TLS	Transport Layer Security encryption						
SSL	Secure Socket Layer encryption						
Login Name	The optional login name for the outgoing email server. <i>Self-hosted version only.</i>						
Password	The optional password for the outgoing email server. <i>Self-hosted version only.</i>						

<p>Reply Address</p>	<p>The email reply address for notifications sent by the application. This is required if you have specified the outgoing email server address.</p> <p>Note that you may want to use a "no reply" email address, e.g. "noreply@someco.com", if you want to make it clear to your employees that they should not respond to the automated email notices sent by the application.</p> <p>Spam note: Be careful what address you use for the reply address. Some destination email servers will reject the email notices sent by Pacific Timesheet if the reply address is for a different domain than that of the email server used to send the email.</p>								
<p>Audit Level</p>	<p>The audit level controls the amount of auditing the system performs. All audit events can be reported on using the Audit Report, available from the Reports tab. The following audit levels are provided:</p> <table border="1" data-bbox="651 842 1382 1953"> <thead> <tr> <th colspan="2" data-bbox="651 842 1382 891">Audit Levels</th> </tr> </thead> <tbody> <tr> <td data-bbox="651 891 874 931">None</td> <td data-bbox="874 891 1382 931">No auditing</td> </tr> <tr> <td data-bbox="651 931 874 1317">Standard</td> <td data-bbox="874 931 1382 1317"> Standard auditing, which includes the following audit controls: <ul style="list-style-type: none"> • Logging successful and unsuccessful login attempts, including their IP address • Logging login name and password changes • Logging audit setting changes • Logging user creation, modification and deletion • Logging timesheet deletion </td> </tr> <tr> <td data-bbox="651 1317 874 1953">High (DCAA)</td> <td data-bbox="874 1317 1382 1953"> Full Defense Contract Audit Agency (DCAA) auditing. This provides the following additional audit controls over the Standard audit level: <ul style="list-style-type: none"> • Logging of any changes made to an employee's timesheet by another employee (for example their manager). • Logging of any changes an employee makes to their own timesheet if the time entry is more than 24 hours in the past. • Timesheets require approval • Comments must be recorded when timesheets are approved, rejected, or resubmitted for approval. • For more information see http://www.dcaa.mil/ </td> </tr> </tbody> </table>	Audit Levels		None	No auditing	Standard	Standard auditing, which includes the following audit controls: <ul style="list-style-type: none"> • Logging successful and unsuccessful login attempts, including their IP address • Logging login name and password changes • Logging audit setting changes • Logging user creation, modification and deletion • Logging timesheet deletion 	High (DCAA)	Full Defense Contract Audit Agency (DCAA) auditing. This provides the following additional audit controls over the Standard audit level: <ul style="list-style-type: none"> • Logging of any changes made to an employee's timesheet by another employee (for example their manager). • Logging of any changes an employee makes to their own timesheet if the time entry is more than 24 hours in the past. • Timesheets require approval • Comments must be recorded when timesheets are approved, rejected, or resubmitted for approval. • For more information see http://www.dcaa.mil/
Audit Levels									
None	No auditing								
Standard	Standard auditing, which includes the following audit controls: <ul style="list-style-type: none"> • Logging successful and unsuccessful login attempts, including their IP address • Logging login name and password changes • Logging audit setting changes • Logging user creation, modification and deletion • Logging timesheet deletion 								
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Audit Days	The number of days to keep audit data (maximum 365). Note that audit data, especially if using the high (DCAA) level, can consume a considerable amount of storage.
Application URL	The base address for this application, for example http://hostname/timesheet . This is used when formatting links in email notices and other messages. For instance, the notice variable <code>\${System.url}</code> will be replaced with this value (see the Notices topic for more details). <i>Self-hosted version only.</i>

Send Test Email

After configuring your email server settings it is a good idea to send a test email. The email will be sent to the same address as the reply address.

Related Topics

- [Work Breakdown Structure](#)
- [Time Periods](#)
- [Holidays](#)
- [Work Shifts](#)
- [Approval Levels](#)
- [Rate Options](#)
- [Terminology](#)
- [Branding](#)
- [Data Integration](#)
- [System Options](#)
- [License](#)
- [System Lists](#)

Work Breakdown Structure

The work breakdown structure (WBS) is used to organize work into a series of components, such as projects, phases, tasks, etc. You can define up to 5 components, and name each level as you need. For instance, your organization might have the following WBS:

Client > Project > Phase > Task

Or

Task > Labor Code

WBS components have the following properties:

Property	Description
Enabled	Indicates whether the component is enabled.
Dependent	If checked then the component may depend on the previous component. For example, if you have a two level WBS composed of Projects and Tasks, checking the dependent check box for the Task would indicate that the list of tasks presented to an employee might depend on which project was selected. See the Dependencies section below for more information.
Name	The singular name of the component, for example "Client".
Plural	The plural name of the component, for example "Clients".

Dependencies

Dependencies allow you to limit or scope which items can be added to a timesheet based on a previous selection in the WBS structure. For instance, you might want to limit some projects to specific customers. To do this you would check the appropriate "Dependent" check box:

>> General >> Work Breakdown Structure

WBS Component	Enabled	Dependent	Name	Plural
Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Customer	Customers
Project Group	<input type="checkbox"/>	<input type="checkbox"/>	Project Group	Project Groups
Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Project	Projects
Task Group	<input type="checkbox"/>	<input type="checkbox"/>	Task Group	Task Groups
Task	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Task	Tasks

Checking this dependent check box indicates that a project depends on the parent component above it, in this case the customer. Now when you view the properties for a project (from the Tasks > Projects page) you will see a Customers section:

>> Projects >> Project A

Project Detail		Edit	Clone	Delete	Done	
Name:	Project A					
Description:						
ID:						
Status:	Active					
Planned Start Date:						
Planned Finish Date:						
Planned Work:						
Actual Start Date:						
Actual Finish Date:						
Actual Work: 0.00 Days						
Created on 4/23/2010 8:36AM by Admin, Modified on 4/23/2010 8:36AM by Admin						
Notes						
Project Dashboard						
Customers - Restrict this Project to the following Customers:					Add	Remove
<input type="checkbox"/>	Name	ID	Description			
-No restrictions-						
Permissions						

If you leave the Customers section blank (no restrictions) then this project will be available regardless of the selected customer. This allows you to have 'global' components that are always available, whether a parent selection is made or not. To limit this project to one or more specific customers click the Add button and add the appropriate customers. Then, when employees browse for projects to add to their timesheet, they will not see this project unless one of the customers in the list is selected first.

Note that dependencies take effect on the timesheet page, as well as for reports that allow you to filter based on customers, projects, etc., such as the "Timesheet Details" report.

Time Periods

Time periods are used to define common timesheet and reporting periods. You can define as many different time periods as you need. Once defined, they can be used when editing and creating [Timesheet Templates](#), or when running reports. The following types of time periods are supported:

Type	Description
Weekly	7 day time period, with your choice of the first day of the week.
Biweekly	14 day time period, with your choice of the first day of the week.
Semimonthly	Semi-monthly time period, typically the 1st through the 15th, and the 16th through the end of the month.
Quadweekly	28 day time period, with your choice of the first day of the week.
Monthly	Monthly time period, with your choice of the first day of the month.
Custom	Custom time periods, where each time period can be a different number of days.

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Holidays

The Holidays page lets you define your company holidays. The following properties can be set for each holiday:

Property	Description
Name	The name of the holiday, up to 80 characters. You should keep this as short as reasonably possible, however, to better fit it on timesheets and dashboards.
Description	A description for the holiday, up to 255 characters.
Date	The date of the holiday.
Repeat	If this holiday recurs then select the appropriate value. For instance, for New Years you could set the date to January 1, 2009 and choose a repeat value of "Yearly on this date". For the U.S. holiday Thanksgiving you could set the date to November 27, 2009 and choose a repeat value of "Yearly on the 4th" Thursday of November.
Partial Day	Check this option to create a partial day holiday. For instance, you might have a half-day holiday on New Year's Eve. The actual number of hours pushed onto employee timesheets will be determined by their Scheduled Hours Per Day property on the Employees page (or, if the employee property is not set, the Hours Per Day property on the System > General page). For example, if the employee is scheduled to work 8 hours per day, a half-day holiday would result in 4 hours being placed on the timesheet.
Locale	You can limit the holiday to a specific set of locales or countries. If this list is empty then there is no locale limitation. See the Managing Employees topic for more information on employee locales.
Groups	You can limit the holiday to a specific set of employee groups. If this list is empty then there is no group limitation.

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Work Shifts

The Work Shifts page lets you define your company work shifts. Work shifts affect how much an employee is paid by applying a pay differential when working in certain shifts. The following properties can be set for each shift:

Property	Description
Name	The name of the shift, up to 80 characters.
Description	An optional description for the shift, up to 255 characters.
ID	An optional unique identifier for the shift, up to 80 characters.
Start Time	The start time for the shift, for example "8:00 AM".
Finish Time	The finish time for the shift, for example "5:00 PM".
Valid Days	The days of the week for which the shift is valid, such as Monday through Friday.
Shift Differential	The differential rate used to calculate a shift premium when working in the shift, for example "0.25". If the employee's base pay was \$20/hour, the shift differential would result in a real pay rate of \$25/hour.

Once you have created your shifts you will still need to activate them per employee policy from the System > Policies page. See the [Wage Rules](#) topic for more information.

Additional Configuration: Shift Over Time

If you need to track how much regular time, overtime and double time was spent in shifts, you will need to do some additional configuration. You will need to create 3 custom timesheet fields as follows (from the System > Templates > Custom Fields page):

Field Name	Description
Shift Regular Time	Type = Number, decimal digits = 2
Shift Over Time	Type = Number, decimal digits = 2
Shift Double Time	Type = Number, decimal digits = 2

The name of the custom field must be exactly the same as shown above. However, once you have created the custom field, you can later rename it as desired without affecting the system. Once you have defined these fields then any regular time, over time or double time hours that fall in a shift will be placed into these fields.

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Approval Levels

You can define multiple timesheet approval levels. Many organizations require additional approval levels to handle different work flows. For instance you might have a manager approval, a billing approval and a payroll approval. Creating separate approval levels can facilitate any work flows that are triggered by the approval process.

Approvals are optional - you do not need to have any approval levels enabled if your organization does not require timesheet approvals.

The following properties can be configured for each approval level:

Property	Description
Enabled	Indicates whether the approval level is enabled.
Name	The name for the approval level, up to 40 characters. Names should be as short as possible, and not include the word "level". If you only have one approval level you do not need to specify the name.

Project Time Approval

You can optionally specify that one of the approval levels is for project time approval. You can specify which level is considered the project approval level from the **System > General > Project Options page**. See the [Approving Project Time](#) topic for more information.

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Bill/Pay Rate Options

Rate options allow you to control how bill and pay rates are specified when an employee saves their time. Pacific Timesheet has a very flexible bill and pay rate engine that allows you to configure your rates to depend on not just the employee or the project, but to have rates that also depend on tasks, jobs and cost centers.

Note: Changes to rate options take effect for the current timesheet period and will not affect previously submitted timesheets.

The following properties can be configured for bill and pay rates:

Property	Description
Rates Depend On	The type of object that rates primarily depend on, for example Employees, or Projects.
Make Exceptions For	The type of object for which you may need to make exceptions to the primary rate. For instance, if your organization's bill rate depends primarily on Projects, then you might make exceptions for certain Employees.
Billable/Payable Flag On	The object that has the billable/payable flag. A common example is to have the billable flag on Tasks, so that certain tasks can be marked as non-billable.
Rates Apply Only For	The type of hours for which these rates are applicable. Bill rates would generally only apply to work hours, whereas pay rates might apply to both work and leave (in other words, paid leave).

Different organizations have different rules for how bill and pay rates are specified. For instance, when keeping track of project bill rates you might configure bill rates as follows:

Rates Depend On: Projects
Make Exceptions For: Employees
Billable/Payable Flag On: Tasks
Rates Apply Only For: Work Hours

In the above example the default bill rate is set on the project. Employees can be given specific bill rates on projects, overriding the default rate. Tasks have a billable flag, allowing the creation of tasks that are non-billable. Time recorded against a non-billable task will have a bill rate of zero, regardless of the project or employee bill rate.

Standard Rates

When specifying bill and pay rates you have the option of using named values, rather than specifying an actual numeric rate. By assigning a named value to a set of employees, for instance, you can later change the named value's rate and all of the employees will pick up the new value. Rates have the following properties:

Property	Description
Name	The rate name, up to 80 characters. A value is required and must be unique for all rates.
Rate	The hourly rate, in the base currency. The base currency is specified from the System Settings page.

Status	The rate status, either Active or Inactive. You cannot delete rates that are currently assigned to employees. Setting the rate to inactive will prevent the rate from being assigned to new employees.
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Terminology

You can override the default terminology for a number objects and phrases in the application. Make sure when changing the terminology that you specify both singular and plural versions to avoid confusion.

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Branding

Branding allows you to customize the application suit your organization. You can specify the following properties:

Property	Description
Company Name	The name of your company or organization. The company name can be used in email notices sent by the application.
Application Name	The application name. The application name appears in several places in the product, including the window title and email notices sent by the application.
Application Logo	The application logo, which appears in the upper-left corner of the page. This is an image file, usually GIF or JPEG, and should be no larger than 50 pixels tall and 350 pixels wide.

Clicking the **Restore Defaults** button will reset the properties to their factory settings - make sure you click the **OK** button after clicking Restore Defaults to confirm the change.

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Data Integration

Data Integration

Data Integration allows you to enable and configure the external data and device integration facilities provided by Pacific Timesheet. The following integration types are provided:

Integration Type	Description
Timesheet Export	Configure timesheet export settings, such as which time entry fields are exported, etc. See the Export Options topic for more information.
Timesheet Export - Time Bank	Time Bank software provides integration with most popular payroll, HR and general ledger applications. Over 250 systems are supported, and you can find out more by contacting your sales representative or visiting our website at http://www.pacifictimesheet.com/ .
QuickBooks Interchange File (IIF)	QuickBooks IIF file support allows you to export your timesheets into QuickBooks for both invoicing and payroll. See the QuickBooks Export File help topic for more information.
Employee Export	Configure regularly scheduled exports of employee data. See the Export Options topic for more information.
Group Export	Configure regularly scheduled exports of group data. See the Export Options topic for more information.
Auto-Import Directory	The auto-import directory allows you specify a folder that is monitored for CSV files that will be automatically imported into the system. See the Auto-Import Directory help topic for more information.
LDAP/Active Directory	LDAP/Active Directory support allows you to use an LDAP or Active Directory server for authentication, as opposed to the built-in application authentication. For more information see the Security topic.
Time Clock Device	Time clock device support allows you to integrate with external time clock devices, such as those provided by ACTatek. For more information see the Devices topic.
Web Services API	The web services API allows you to send and receive timesheet, employee, project and other information with Pacific Timesheet. System administrators can learn more about this topic by logging into the customer support portal and searching for "REST API" to locate and download the REST API document.

Timesheet Export Options

The Timesheet Export Options page allows you to configure how time sheet data is exported. You can enable and define multiple export configurations, which is useful if you need to export to more than one system, for example payroll and billing. The following options are provided:

Options	Description						
Name	You can name the export, which is useful if you have more than one defined export. For example you might name one 'Payroll' and the other 'Billing'. The name can be up to 80 characters in length.						
Description	A description of the export configuration, up to 255 characters.						
Enabled	If checked then this export will show up in the list of available exports in the Timesheets and Approvals tabs.						
Clip to Date Range	Check this option to clip time entries to the selected date range when exporting. This option is useful if you are exporting time entries for time periods different than the timesheet period. You would want to check this option, for instance, if timesheets have weekly periods but you export to payroll semimonthly.						
Exported Fields	Select the time entry data fields to export, as well as their order. This option is useful if you need to integrate timesheet data with external systems such as payroll processing, etc. For example, SurePayroll systems require the following 6 fields in this order: TimeEntry.Date Employee.ID Employee.Last Name Employee.First Name Pay Code.ID TimeEntry.Hours						
Custom Header	For some external systems you may want a special header at the beginning of the export file, rather than the standard list of field names. For example, SurePayroll systems require the following two lines at the start of the file: TC 00001						
Rollup	Check this option to roll up or total the hours in each time period for each pay code. Instead of outputting an individual record for each time entry, time entries will be summarized by pay code.						
Date Format	Select the date format you want to use for exported date and date-time fields. The following characters specify how the dates are formatted: <table border="1" data-bbox="491 1742 1513 1921"> <tbody> <tr> <td>d</td> <td>Day in month. Use dd to always output a two-digit day of month, e.g. "01".</td> </tr> <tr> <td>M</td> <td>Month. Use MM to always output a two-digit month, e.g. "01".</td> </tr> <tr> <td>y</td> <td>Year. Use yy to always output a two digit year, e.g. "14". Use yyyy to always output a 4 digit year, e.g. "2014".</td> </tr> </tbody> </table>	d	Day in month. Use dd to always output a two-digit day of month, e.g. "01".	M	Month. Use MM to always output a two-digit month, e.g. "01".	y	Year. Use yy to always output a two digit year, e.g. "14". Use yyyy to always output a 4 digit year, e.g. "2014".
d	Day in month. Use dd to always output a two-digit day of month, e.g. "01".						
M	Month. Use MM to always output a two-digit month, e.g. "01".						
y	Year. Use yy to always output a two digit year, e.g. "14". Use yyyy to always output a 4 digit year, e.g. "2014".						

Time Format	Select the time format you want to use for exported time and date-time fields. The following characters specify how the times are formatted:	
	h	Hour in day using 12 hour clock (1 - 12). Use hh to always output a two-digit hour, e.g. "01".
	H	Hour in day using 24-hour clock (0 - 23). Use HH to always output a two digit hour, e.g. "01".
	m	Minute in hour. Use mm to always output a two-digit minute, e.g. "01".
	a	A.M. or P.M.

Timesheet Export Schedule

You can automate timesheet exporting using the timesheet export scheduling feature. This allows you to export timesheets to a file on the server (or network drive) where Pacific Timesheet is installed (self-hosted only), or to an FTP server. The following options are provided:

Options	Description
Schedule Enabled	Check this option to enable scheduled timesheet exporting.
Schedule	The schedule or frequency for timesheet exporting. The time period can be any created in the System > General > Time Periods page. To specify the exact time within the time period when the export occurs you specify an offset (in hours:minutes) from the start or end of the time period. For instance, if you want to export timesheets at 4:30 PM (16:30) on the last day of the time period, you would specify "7:30 hh:mm before the period ends".
Next Run	As you modify the schedule, this property will update to show when the next export will occur.

Export To	<p>You have several options for where you can send the export file:</p> <table border="1" data-bbox="489 259 1508 506"> <tr> <td data-bbox="489 259 695 331">Directory</td> <td data-bbox="695 259 1508 331">The export file will be sent to a directory on the computer's local file system, e.g. "c:\exports" (self-hosted only).</td> </tr> <tr> <td data-bbox="489 331 695 403">FTP Server</td> <td data-bbox="695 331 1508 403">The export file will be sent to a remote directory using the FTP protocol.</td> </tr> <tr> <td data-bbox="489 403 695 506">Web Directory</td> <td data-bbox="695 403 1508 506">The export file will be sent to the customer's web directory, e.g. "https://someco.pacifictimesheet.com/customers/someco".</td> </tr> </table> <p>If you choose "FTP Server" the following properties must be configured by clicking the settings button that appears to the right of the menu:</p> <table border="1" data-bbox="489 629 1508 1285"> <tr> <td data-bbox="489 629 695 667">FTP Server</td> <td colspan="2" data-bbox="695 629 1508 667">The host name or IP address of the FTP server.</td> </tr> <tr> <td data-bbox="489 667 695 705">Login</td> <td colspan="2" data-bbox="695 667 1508 705">The user account or login name for the FTP server.</td> </tr> <tr> <td data-bbox="489 705 695 743">Password</td> <td colspan="2" data-bbox="695 705 1508 743">The password for the login, above.</td> </tr> <tr> <td data-bbox="489 743 695 880">FTP Directory</td> <td colspan="2" data-bbox="695 743 1508 880">The directory where export files will be created, e.g. "/" or "/tmp". FTP server paths start with a forward slash, and backslashes are not valid. If blank, the root directory will be used, which is equivalent to "/".</td> </tr> <tr> <td data-bbox="489 880 695 952">FTP Port</td> <td colspan="2" data-bbox="695 880 1508 952">The port number for the FTP server, where 21 is the default value for most FTP servers.</td> </tr> <tr> <td data-bbox="489 952 695 1023">FTP Mode</td> <td colspan="2" data-bbox="695 952 1508 1023">Check this option to enable passive mode, which aids when transferring files through firewalls.</td> </tr> <tr> <td data-bbox="489 1023 695 1285">Security</td> <td colspan="2" data-bbox="695 1023 1508 1285"> <p>If the FTP server has connection security enabled you will need to set the appropriate value here. Your options are:</p> <table border="1" data-bbox="695 1088 1508 1285"> <tr> <td data-bbox="695 1088 898 1126">None</td> <td data-bbox="898 1088 1508 1126">No connection encryption</td> </tr> <tr> <td data-bbox="695 1126 898 1211">Implicit SSL</td> <td data-bbox="898 1126 1508 1211">Implicit Secure Socket Layer encryption (FTPS)</td> </tr> <tr> <td data-bbox="695 1211 898 1285">Explicit SSL</td> <td data-bbox="898 1211 1508 1285">Explicit Secure Socket Layer encryption, also known as (FTPES)</td> </tr> </table> </td> </tr> </table>	Directory	The export file will be sent to a directory on the computer's local file system, e.g. "c:\exports" (self-hosted only).	FTP Server	The export file will be sent to a remote directory using the FTP protocol.	Web Directory	The export file will be sent to the customer's web directory, e.g. "https://someco.pacifictimesheet.com/customers/someco".	FTP Server	The host name or IP address of the FTP server.		Login	The user account or login name for the FTP server.		Password	The password for the login, above.		FTP Directory	The directory where export files will be created, e.g. "/" or "/tmp". FTP server paths start with a forward slash, and backslashes are not valid. If blank, the root directory will be used, which is equivalent to "/".		FTP Port	The port number for the FTP server, where 21 is the default value for most FTP servers.		FTP Mode	Check this option to enable passive mode, which aids when transferring files through firewalls.		Security	<p>If the FTP server has connection security enabled you will need to set the appropriate value here. Your options are:</p> <table border="1" data-bbox="695 1088 1508 1285"> <tr> <td data-bbox="695 1088 898 1126">None</td> <td data-bbox="898 1088 1508 1126">No connection encryption</td> </tr> <tr> <td data-bbox="695 1126 898 1211">Implicit SSL</td> <td data-bbox="898 1126 1508 1211">Implicit Secure Socket Layer encryption (FTPS)</td> </tr> <tr> <td data-bbox="695 1211 898 1285">Explicit SSL</td> <td data-bbox="898 1211 1508 1285">Explicit Secure Socket Layer encryption, also known as (FTPES)</td> </tr> </table>		None	No connection encryption	Implicit SSL	Implicit Secure Socket Layer encryption (FTPS)	Explicit SSL	Explicit Secure Socket Layer encryption, also known as (FTPES)
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Directory	<p>The directory on the computer or FTP server where the export file will be created. If the "Export To" property is set to "Directory" then this is the file path to the directory where the export file will be created, e.g. "/tmp", "c:\exports" or "\\morpheus\c\exports". The path must be valid for the server that Pacific Timesheet is installed on.</p> <p>If the "Export To" property is set to "FTP" then this is the directory on the FTP server where you want the export file created, e.g. "/" or "/tmp". FTP server paths start with a forward slash, and backslashes are not valid.</p>																																	
File Name	<p>The name of the export file, e.g. "timesheets-for-payroll". The "Append timestamp" option will add the date and time of the export to the file name, e.g. "timesheets-for-payroll.200908150831". Note that the file extension will automatically be added when the export file is created, based on the Format property, described below. For CSV format, the file extension ".csv" will be added to the file name. For MS Excel format, the file extension ".xls" will be added to the file name.</p>																																	
Format	<p>The format of the export file, either comma-separated-values (CSV) or Microsoft Excel (XLS).</p>																																	

File Encryption	<p>You can optionally encrypt the export file using PGP (Pretty Good Privacy). If you choose this option you need to specify the following options:</p> <table border="1" data-bbox="491 297 1506 533"> <tr> <td data-bbox="491 297 695 432">Encryption Key</td> <td data-bbox="695 297 1506 432">The public encryption key to use when encrypting the export file. Click the settings button to the right of the menu to import and manage your encryption keys. An encryption key is required.</td> </tr> <tr> <td data-bbox="491 432 695 533">Armor</td> <td data-bbox="695 432 1506 533">Check this option to output the encrypted file in armored ASCII format, rather than binary format. The file will have the '.asc' file extension appended to it.</td> </tr> </table> <p>When the file encryption is set to PGP the export file will have the '.pgp' file extension appended to the file name. If the armor option is selected then the file will also have the '.asc' extension added to it, so the export file will end in '.pgp.asc'.</p>	Encryption Key	The public encryption key to use when encrypting the export file. Click the settings button to the right of the menu to import and manage your encryption keys. An encryption key is required.	Armor	Check this option to output the encrypted file in armored ASCII format, rather than binary format. The file will have the '.asc' file extension appended to it.	
Encryption Key	The public encryption key to use when encrypting the export file. Click the settings button to the right of the menu to import and manage your encryption keys. An encryption key is required.					
Armor	Check this option to output the encrypted file in armored ASCII format, rather than binary format. The file will have the '.asc' file extension appended to it.					
Time Period	The time period to use when searching for timesheets to export. For example, you might schedule the export to occur weekly, but want to export the previous week's timesheets.					
Status	Select a value if you want to only export timesheets with a particular status, such as submitted or approved.					
Group	Select a value if you want to only export timesheets for employees in a particular group.					
Export Status	Select a value if you want to only export time entries that are either unexported or exported. Time entries are only marked as exported if the "Mark as Exported" option is selected (described below).					
Mark as Exported	Checking this option will mark each exported time entry as having been exported. This works in conjunction with the "Export Status" filter option, described above.					

QuickBooks Export File

Intuit QuickBooks Pro allows the importing data from an external source. Pacific Timesheet provides a QuickBooks-compatible timesheet export file that you can use to transfer time activities directly into QuickBooks for both invoicing and payroll. The format of the file is the Intuit Interchange Format (IIF), and uses the Timer Activity import feature of QuickBooks.

Note: More advanced QuickBooks integration, including bi-directional transfer of jobs, employees and codes, is supported through the Time Bank data integration facility. You can find out more by contacting your sales representative or visiting our website at <http://www.pacifictimesheet.com/>.

To set up your system for proper export you will need to configure the following properties:

Property	Description
Enabled	Check this option to enable the QuickBooks export file support. When enabled you will see an "Export - QuickBooks" item in the options menu on the Timesheets and Approvals tabs.
Company	The QuickBooks company name. This value is found by doing a Timer Activity Export from QuickBooks, as detailed below.
Company Create Time	The QuickBooks company create time. This value is found by doing a Timer Activity Export from QuickBooks, as detailed below.
Template	The QuickBooks timer activity export file template. This is detailed below.

You can control which time entries are exported by specifying any of the following filters:

Property	Description
Billable Filter	Use this filter to export only billable or non-billable hours. You might use this filter if you are only using QuickBooks for billing, for instance.
Payable Filter	Use this filter to export only payable or non-payable hours.
Hours Filter	Use this filter to only export work hours or leave hours.
Employee Filter	Use this filter to only export specific employee types.

Getting the Company Name and Create Time

The first step to configuring your system for proper QuickBooks exporting is to determine the Company name and Company Create Time. To do this you need to start QuickBooks Pro and run the Timer Lists export under the File > Utilities > Export menu. Save this file to a convenient location and open it with a text editor such as Notepad or Wordpad. Look for lines like the following:

```
!TIMERHDR VER REL COMPANYNAME IMPORTEDBEFORE FROMTIMER
COMPANYCREATETIME
TIMERHDR 7 0 Arpent N Y 1165339129
```

The TIMERHDR line has the Company name and Company Create Time values we need. In this case the Company name is Arpent, and the Company Create Time is 1165339129.

The TIMERHDR fields are:

VER	The version number of the QuickBooks Timer, for example 7. You can find this information by first running an Timer Activity export in QuickBooks and viewing the output. You will need to modify the template replacing the example value with your specific value.
REL	The release number of the QuickBooks Timer. You can find this information by first running an Timer Activity export in QuickBooks and viewing the output. You may need to modify the template to replace the example value with your specific value, otherwise QuickBooks may generate a warning message when importing the data.
COMPANYNAME	The name of your QuickBooks company. If you leave this as <code>\${System.company}</code> it will be automatically substituted with the Company property entered above.
FROMTIMER	Indicates whether you are exporting or importing data. It should always be the value "Y".
COMPANYCREATETIME	A unique number that comes from your QuickBooks Pro company file. You can find this information by first running an Timer Activity export in QuickBooks and viewing the output. You will need to modify the template replacing the example value with your specific value.

Configuring the Template

The export file generated by Pacific Timesheet will contain the TIMERHDR records above, as well as TIMEACT records for each timesheet's time entries. The format of a TIMEACT might look like the following:

!TIMEACT	DATE	JOB	EMP	ITEM	PITEM	DURATION	PROJ	NOTE
XFERTOPAYROLL		BILLINGSTATUS						
TIMEACT	3/25/08		ABCompany:Job	123	Bill Williams		Support	02:00
		N		1				

The TIMEACT fields are:

DATE	The date the activity was performed, in MM/DD/YY format. This is generally set to the variable <code>\${TimeEntry.date}</code> , described below.
JOB	The QuickBooks job, which is in the format Customer:Job. This is generally set to the variable <code>\${Customer.name}:\${Project.name}</code> , described below.
EMP	The name of the employee. This is meant to map to the QuickBooks employee name and must match exactly. Outputted as "Lastname, Firstname" by default. This is generally set to the variable <code>\${User.name}</code> or <code>\${User.fullName}</code> , described below.
ITEM	The name of the service item assigned to the activity. This is generally set to the variable <code>\${Task.name}</code> , described below.
PITEM	The name of the payroll item. This is generally set to the variable <code>\${PayCode.name}</code> , described below.
DURATION	This is the duration of the activity in hours and minutes, in HH:MM format. This is generally set to the variable <code>\${TimeEntry.hours}</code> , described below.
NOTE	This field contains the timesheet cell notes. Note that any newline or tab characters will be replaced with a space on the export. This is generally set to the variable <code>\${TimeEntry.notes}</code> , described below.

XFERTOPAYROLL	"N" if not for payroll, or "Y" if for payroll.
BILLINGSTATUS	Indicates the billing status of the activity, either "1" for billable, or "0" for non-billable. By default populated with the Task billable status. This is generally set to the variable <code>#{TimeEntry.billFlag}</code> , described below.

You can control which values from Pacific Timesheet are substituted into the TIMEACT records by editing the template. The following template variables are supported:

Variable	Description
<code>#{TimeEntry.date}</code>	The date of the time entry, formatted as m/dd/yy (the standard QuickBooks date format). This is generally used for the DATE field of a TIMEACT record.
<code>#{TimeEntry.hours}</code>	The time entry hours, formatted as hours:minutes (the standard QuickBooks hours format). This is generally used for the DURATION field of a TIMEACT record.
<code>#{TimeEntry.notes}</code>	The time entry notes, if any. This is generally used for the NOTE field of a TIMEACT record.
<code>#{TimeEntry.billFlag}</code>	The time entry billable flag, with the value "0" if the time entry is not billable, or "1" if the time entry is billable.
<code>#{Customer.name}</code>	The name of the Customer for this time entry. This is generally used for the JOB or ITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Customer to something else (e.g. Client), you still use Customer.name for the variable name.
<code>#{User.name}</code>	The name of the employee, formatted "Lastname, Firstname". This is generally used for the EMP field of a TIMEACT record.
<code>#{User.fullName}</code>	The name of the employee, formatted as "Firstname Lastname". This is generally used for the EMP field of a TIMEACT record.
<code>#{User.id}</code>	The ID of the employee. This is generally used for the EMP field of a TIMEACT record.
<code>#{Customer.id}</code>	The ID of the Customer for this time entry. This is generally used for the JOB or ITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Customer to something else (e.g. Client), you still use Customer.id for the variable name.
<code>#{ProjectGroup.name}</code>	The name of the Project Group for this time entry. This is generally used for the JOB or ITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Project Group to something else (e.g. Client Portfolio), you still use ProjectGroup.name for the variable name.
<code>#{ProjectGroup.id}</code>	The name of the Project Group for this time entry. This is generally used for the JOB or ITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Project Group to something else (e.g. Client Portfolio), you still use ProjectGroup.id for the variable name.
<code>#{Project.name}</code>	The name of the Project for this time entry. This is generally used for the JOB or ITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Project to something else (e.g. Job), you still use Project.name for the variable name.

<code>\${Project.id}</code>	The ID of the Project for this time entry. This is generally used for the JOB or ITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Project to something else (e.g. Job), you still use Project.id for the variable name.
<code>\${TaskGroup.name}</code>	The name of the Task Group for this time entry. This is generally used for the JOB or ITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Task Group to something else (e.g. Phase), you still use TaskGroup.name for the variable name.
<code>\${TaskGroup.id}</code>	The ID of the Task Group for this time entry. This is generally used for the JOB or ITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Task Group to something else (e.g. Phase), you still use TaskGroup.id for the variable name.
<code>\${Task.name}</code>	The name of the Task for this time entry. This is generally used for the JOB or ITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Task to something else (e.g. Activity), you still use Task.name for the variable name.
<code>\${Task.id}</code>	The ID of the Task for this time entry. This is generally used for the JOB or ITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Task to something else (e.g. Activity), you still use Task.id for the variable name.
<code>\${PayCode.name}</code>	The name of the Pay Code for this time entry. This is generally used for the PITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Pay Code to something else, you still use PayCode.name for the variable name.
<code>\${PayCode.id}</code>	The ID of the Pay Code for this time entry. This is generally used for the PITEM field of a TIMEACT record. Note that even if you customized the terminology and renamed Pay Code to something else, you still use PayCode.id for the variable name.

Note that when using the .name variables you need to be careful to match the names in Pacific Timesheet with the names in QuickBooks. If your names in Pacific Timesheet cannot be made identical to those in QuickBooks you will want to use the ID field instead. Change the appropriate template fields to use the .id variables instead, then update the IDproperty of the employees, projects or other objects in Pacific Timesheet with the name as it appears in QuickBooks.

Exporting To QuickBooks

Once you have configured the company name, company create time and template as needed, you can generate the QuickBooks export file. To do this click on the Timesheets or Approvals tab in Pacific Timesheet and list the timesheets you are interested in exporting. Click the options menu (the icon button with a small triangle to the upper-right of the timesheet list) and choose the "Export - QuickBooks" item. Save the resulting file to the appropriate location on your computer.

Next, start QuickBooks Pro, then go to the File > Utilities > Import > Timer Activities and import the file you just saved. QuickBooks will import the data and generate a detailed report of the import results. You can import data as often as your needs require, but be careful not to import the same file twice as QuickBooks will generate duplicate timer activities.

Export Options

The Export Options page allows you to configure and schedule automatic exporting of employees, groups, projects, tasks and other system object. The data can be exported in either CSV or XLS format, and sent to either a directory (for the self-hosted version only) or to an FTP server. The following options are provided:

Options	Description																				
Schedule Enabled	If checked then the export will automatically run on a recurring schedule.																				
Schedule	The automatic export schedule, which can be daily at a specified time of day.																				
Export To	<p>You have the option of exporting to a directory on the computer running the Pacific Timesheet service (self-hosted only), or exporting to an FTP (File Transfer Protocol) server.</p> <p>If you choose "FTP Server" the following properties must be configured by clicking the settings button that appears to the right of the menu:</p> <table border="1"> <tbody> <tr> <td>FTP Server</td> <td>The host name or IP address of the FTP server.</td> </tr> <tr> <td>Login</td> <td>The user account or login name for the FTP server.</td> </tr> <tr> <td>Password</td> <td>The password for the login, above.</td> </tr> <tr> <td>FTP Directory</td> <td>The directory where export files will be created, e.g. "/" or "/tmp". FTP server paths start with a forward slash, and backslashes are not valid. If blank, the root directory will be used, which is equivalent to "/".</td> </tr> <tr> <td>FTP Port</td> <td>The port number for the FTP server, where 21 is the default value for most FTP servers.</td> </tr> <tr> <td>FTP Mode</td> <td>Check this option to enable passive mode, which aids when transferring files through firewalls.</td> </tr> <tr> <td>Security</td> <td> <p>If the FTP server has connection security enabled you will need to set the appropriate value here. Your options are:</p> <table border="1"> <tbody> <tr> <td>None</td> <td>No connection encryption</td> </tr> <tr> <td>Implicit SSL</td> <td>Implicit Secure Socket Layer encryption (FTPS)</td> </tr> <tr> <td>Explicit SSL</td> <td>Explicit Secure Socket Layer encryption, also known as (FTPES)</td> </tr> </tbody> </table> </td> </tr> </tbody> </table>	FTP Server	The host name or IP address of the FTP server.	Login	The user account or login name for the FTP server.	Password	The password for the login, above.	FTP Directory	The directory where export files will be created, e.g. "/" or "/tmp". FTP server paths start with a forward slash, and backslashes are not valid. If blank, the root directory will be used, which is equivalent to "/".	FTP Port	The port number for the FTP server, where 21 is the default value for most FTP servers.	FTP Mode	Check this option to enable passive mode, which aids when transferring files through firewalls.	Security	<p>If the FTP server has connection security enabled you will need to set the appropriate value here. Your options are:</p> <table border="1"> <tbody> <tr> <td>None</td> <td>No connection encryption</td> </tr> <tr> <td>Implicit SSL</td> <td>Implicit Secure Socket Layer encryption (FTPS)</td> </tr> <tr> <td>Explicit SSL</td> <td>Explicit Secure Socket Layer encryption, also known as (FTPES)</td> </tr> </tbody> </table>	None	No connection encryption	Implicit SSL	Implicit Secure Socket Layer encryption (FTPS)	Explicit SSL	Explicit Secure Socket Layer encryption, also known as (FTPES)
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Directory	<p>The directory on the computer or FTP server where the export file will be created. If the "Export To" property is set to "Directory" then this is the file path to the directory where the export file will be created, e.g. "/tmp", "c:\exports" or "\\morpheus\c\exports". The path must be valid for the server that Pacific Timesheet is installed on.</p> <p>If the "Export To" property is set to "FTP" then this is the directory on the FTP server where you want the export file created, e.g. "/" or "/tmp". FTP server paths start with a forward slash, and backslashes are not valid.</p>																				

File Name	The name of the export file, e.g. "employees". The "Append timestamp" option will add the date and time of the export to the file name, e.g. "employees.200908150831". Note that the file extension will automatically be added when the export file is created, based on the Format property, described below. For CSV format, the file extension ".csv" will be added to the file name. For MS Excel format, the file extension ".xls" will be added to the file name.				
Format	The format of the export file, either comma-separated-values (CSV) or Microsoft Excel (XLS).				
File Encryption	<p>You can optionally encrypt the export file using PGP (Pretty Good Privacy). If you choose this option you need to specify the following options:</p> <table border="1" data-bbox="453 636 1267 936"> <tr> <td data-bbox="453 636 655 801">Encryption Key</td> <td data-bbox="660 636 1267 801">The public encryption key to use when encrypting the export file. Click the settings button to the right of the menu to import and manage your encryption keys. An encryption key is required.</td> </tr> <tr> <td data-bbox="453 808 655 936">Armor</td> <td data-bbox="660 808 1267 936">Check this option to output the encrypted file in armored ASCII format, rather than binary format. The file will have the '.asc' file extension appended to it.</td> </tr> </table> <p>When the file encryption is set to PGP the export file will have the '.pgp' file extension appended to the file name. If the armor option is selected then the file will also have the '.asc' extension added to it, so the export file will end in '.pgp.asc'.</p>	Encryption Key	The public encryption key to use when encrypting the export file. Click the settings button to the right of the menu to import and manage your encryption keys. An encryption key is required.	Armor	Check this option to output the encrypted file in armored ASCII format, rather than binary format. The file will have the '.asc' file extension appended to it.
Encryption Key	The public encryption key to use when encrypting the export file. Click the settings button to the right of the menu to import and manage your encryption keys. An encryption key is required.				
Armor	Check this option to output the encrypted file in armored ASCII format, rather than binary format. The file will have the '.asc' file extension appended to it.				
Status Filter	Select a value if you want to only export objects that are active or inactive.				
Timesheet Filter	This appears only for Employee exports. Select a value if you only want to export employees who have a timesheet (that is, the Timesheet property in their employee profile is not blank).				
Exported Fields	Select the data fields to export, as well as their order.				
Custom Header	For some external systems you may want a special header at the beginning of the export file, rather than the standard list of field names.				

Auto-Import Directory

The auto-import directory provides another way for you to import data into Pacific Timesheet. When CSV files are dropped into the auto-import directory they will be automatically imported into the system. The format of the import files is exactly the same as when you import through the web browser. For information about the CSV import file format see the [Importing/Exporting](#) topic.

To set up a directory for auto-importing you need to configure the following properties:

Property	Description																				
Enabled	Check this option to enable auto-importing.																				
Import From	<p>You have the option of importing from a directory on the computer running the Pacific Timesheet service (self-hosted only), or importing from an FTP (File Transfer Protocol) server.</p> <p>If you choose "FTP Server" the following properties must be configured by clicking the settings button that appears to the right of the menu:</p> <table border="1"> <tr> <td>FTP Server</td> <td>The host name or IP address of the FTP server.</td> </tr> <tr> <td>Login</td> <td>The user account or login name for the FTP server.</td> </tr> <tr> <td>Password</td> <td>The password for the login, above.</td> </tr> <tr> <td>FTP Directory</td> <td>The directory where export files will be created, e.g. "/" or "/tmp". FTP server paths start with a forward slash, and backslashes are not valid. If blank, the root directory will be used, which is equivalent to "/".</td> </tr> <tr> <td>FTP Port</td> <td>The port number for the FTP server, where 21 is the default value for most FTP servers.</td> </tr> <tr> <td>FTP Mode</td> <td>Check this option to enable passive mode, which aids when transferring files through firewalls.</td> </tr> <tr> <td>Security</td> <td> <p>If the FTP server has connection security enabled you will need to set the appropriate value here. Your options are:</p> <table border="1"> <tr> <td>None</td> <td>No connection encryption</td> </tr> <tr> <td>Implicit SSL</td> <td>Implicit Secure Socket Layer encryption (FTPS)</td> </tr> <tr> <td>Explicit SSL</td> <td>Explicit Secure Socket Layer encryption, also known as (FTPES)</td> </tr> </table> </td> </tr> </table>	FTP Server	The host name or IP address of the FTP server.	Login	The user account or login name for the FTP server.	Password	The password for the login, above.	FTP Directory	The directory where export files will be created, e.g. "/" or "/tmp". FTP server paths start with a forward slash, and backslashes are not valid. If blank, the root directory will be used, which is equivalent to "/".	FTP Port	The port number for the FTP server, where 21 is the default value for most FTP servers.	FTP Mode	Check this option to enable passive mode, which aids when transferring files through firewalls.	Security	<p>If the FTP server has connection security enabled you will need to set the appropriate value here. Your options are:</p> <table border="1"> <tr> <td>None</td> <td>No connection encryption</td> </tr> <tr> <td>Implicit SSL</td> <td>Implicit Secure Socket Layer encryption (FTPS)</td> </tr> <tr> <td>Explicit SSL</td> <td>Explicit Secure Socket Layer encryption, also known as (FTPES)</td> </tr> </table>	None	No connection encryption	Implicit SSL	Implicit Secure Socket Layer encryption (FTPS)	Explicit SSL	Explicit Secure Socket Layer encryption, also known as (FTPES)
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Directory	<p>The directory on the computer or FTP server from where the export files will be imported. If the "Import From" property is set to "Directory" then this is the file path to the directory where the import files will be replaced, e.g. "/tmp", "c:\imports" or "\\morpheus\c\imports". The path must be valid for the server that Pacific Timesheet is installed on.</p> <p>If the "Import From" property is set to "FTP" then this is the directory on the FTP server from where you want to read the import files, e.g. "/" or "/tmp". FTP server paths start with a forward slash, and backslashes are not valid.</p>																				

When Finished	This option determines what to do to the file when finished, so that it will not be reprocessed. The following options are available:	
	Delete	Delete the file after successfully importing the data.
	Rename	Rename the file by appending ".fin" after successfully importing the data.

File Naming

Import files need to be named in a specific way in order for the system to know how to process it:

1. The file name must end is ".csv"
2. The file name must start with the type of objects being imported, then a hyphen, then the key field, and finally a hyphen:

objects-keyfield-*.csv

The first part, 'objects', is the type of objects being imported, such as employees or tasks. The next part, 'keyfield', is the object property to use to avoid creating duplicates, for instance name or id. The '*' is a wild-card indicating that any valid file name text can appear after the hyphen. For example, to import employees using the login name as the key field the following file name would be appropriate:

employees-login-myemployees.csv

The following tables lists the objects that can be imported, along with their supported key fields.

General Imports:

Object	Key Fields	Notes
employees	login, id, email	If you renamed employees using the terminology feature then use your plural terminology, making sure to remove spaces, if any, in the name. For example: "resources-name-.csv", "resources-name-xyz.csv", etc.
employeebalances	(none)	No key field needed. If you renamed employees using the terminology feature then replace 'employee' with your singular terminology, making sure to remove spaces, if any, in the name. For example: "resourcebalances-.csv", "resourcebalances-xyz.csv", etc.
groups	name, id	
timesheets	(none)	No key field is needed in the file name, but if the import file specifies the ID column then that will be used to match to a possible previously existing entry. File name examples: "timesheets-.csv", "timesheets-xyz.csv", etc.

billrates	(none)	No key field needed. For example: "billrates-.csv", "billrates-xyz.csv", etc.
payrates	(none)	No key field needed. For example: "payrates-.csv", "payrates-xyz.csv", etc.

Work Breakdown Structure (WBS) Imports:

Object	Key Fields	Notes
customers	name, id	If you renamed customers using the terminology feature then use your plural terminology, making sure to remove spaces, if any, in the name. For example: "clients-name-.csv", "clients-name-xyz.csv", etc.
projectgroups	name, id	If you renamed project groups using the terminology feature then use your plural terminology, making sure to remove spaces, if any, in the name. For example: "portfolios-name-.csv", "portfolios-name-xyz.csv", etc.
projects	name, id	If you renamed projects using the terminology feature then use your plural terminology, making sure to remove spaces, if any, in the name. For example: "jobs-name-.csv", "jobs-name-xyz.csv", etc.
taskgroups	name, id	If you renamed task groups using the terminology feature then use your plural terminology, making sure to remove spaces, if any, in the name. For example: "phases-name-.csv", "phases-name-xyz.csv", etc.
tasks	name, id	If you renamed tasks using the terminology feature then use your plural terminology, making sure to remove spaces, if any, in the name. For example: "activities-name-.csv", "activities-name-xyz.csv", etc.

Asset Imports:

Object	Key Fields	Notes
assets	name, id	If you renamed assets using the terminology feature then use your plural terminology, making sure to remove spaces, if any, in the name. For example: "jobmaterials-name-.csv", "jobmaterials-name-xyz.csv", etc.
assetclasses	name, id	If you renamed assets using the terminology feature then use your plural terminology, making sure to remove spaces, if any, in the name. For example: "jobmaterialclasses-name-.csv", "jobmaterialclasses-name-xyz.csv", etc.

assetentries	(none)	No key field is needed in the file name, but if the import file specifies the ID column then that will be used to match to a possible previously existing entry. If you renamed assets using the terminology feature then use your plural terminology, making sure to remove spaces, if any, in the name. For example: "jobmaterialentries-.csv", "jobmaterialentries-xyz.csv", etc.
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Note that these file naming conventions are case-insensitive.

Logging and Error Handling

An import log file will be generated in the auto-import directory, with details about what was imported, and any errors that might have occurred. Up to 7 days of log files will be generated - older ones will be deleted automatically.

If any errors occur during the import, the import file will be renamed by appending ".err" to the file.

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System Options

System options are system-wide or global settings, and include the following properties:

Property	Description
Crew Timesheets	<p>If enabled then crew timesheets are available. Crew timesheets allow you to quickly record and track time for groups (crews) of employees using a large grid-style timesheet.</p> <p>Note: You can change the terminology 'Crew' to suit your organization's needs. The Terminology topic has more information.</p>
Asset Tracking	<p>If enabled then asset tracking is available. Asset tracking allows the recording of material, equipment and other types of resources used on projects and jobs.</p> <p>Note: You can change the terminology 'Asset' to suit your organization's needs. The Terminology topic has more information.</p>
Export File EOL	<p>This setting allows you to specify the type of EOL (End Of Line) character to use when generating text export files, such as CSV (Comma Separated Values) data. What you choose here will depend upon what external applications you wish to integrate with. Most applications support the LF (Line Feed) character. However some Windows applications do require CR+LF (Carriage Return and Line Feed) characters.</p>
Import File Blank Values	<p>Blank number and date values are generally ignored in import files, to avoid accidentally clearing out existing values. You can change this default behavior by choosing the "Don't Ignore Blank Values" option: when this is set a blank date or numeric value in an import file will clear out the appropriate value in the Pacific Timesheet object.</p>

License

Enter your license key on this page. After clicking OK your new license will take effect immediately.

The license limits how many active employees your system may have. There is no limit on how many inactive users you may have, so in general you need never delete terminated employees, just inactivate their accounts.

If you are hosting the software yourself, a free, non-expiring 10-employee license is generated when installed. This free license does not come with any technical support. You can purchase a support contract or a license for more employees by contacting your Pacific Timesheet reseller or sales@pacifictimesheet.com, or visiting www.pacifictimesheet.com. When ordering a new license you will be asked to provide the host computer name, which can be found on System > General > License page.

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System Lists

System lists are collections of named values that you can modify, such as Employment Types. You might need to modify lists when integrating with external systems such as payroll applications.

List items have the following properties:

Property	Description
Name	The name of this item, up to 255 characters.
Value	The value for this item, up to 255 characters.

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Pay Codes

Pay codes are used to categorize time entries. For instance you might use pay codes like Regular Time or Over Time for work time entries, and pay codes like Sick or Vacation for leave time entries.

Note: Some built-in pay codes have special uses, and changes to them should be carefully considered. For instance, to avoid confusion you would not want to rename Holiday to Vacation, or rename Over Time to Double Time. The following built-in pay codes have special uses:

Regular Time, **Over Time** and **Double Time** are used by the Over Time Rules (see the [Policies](#) topic for more information).

Flex Time is used by the Flex Time Rules (see the [Policies](#) topic for more information).

Holiday is used when placing holidays onto timesheets by the Schedule Rules (see the [Policies](#) topic for more information).

Note: You can change the terminology for Pay Code, Work and Leave to suit your organization's needs. The [Terminology](#) topic has more information.

Pay codes have the following general properties:

Property	Description
Name	The pay code name, up to 80 characters. A value is required and must be unique for all pay codes.
Description	A description for the pay code, up to 255 characters.
ID	The pay code ID, up to 80 characters. This value is not required, but if a value is entered it must be unique for all pay codes. This is commonly used for synchronizing with external systems, such as payroll or accounting.
Status	The pay code status, either Active or Inactive. You cannot delete pay codes that have been used on timesheets. Setting the status to inactive will prevent any further use of the pay code.
Type	The pay code type, either Work or Leave. This property can only be changed when creating a new pay code - once a pay code has been created you cannot change its type. Note that the terminology for Work and Leave can be changed from the General page under the System tab.
Can Request	If checked then this pay code can be requested from the employee's Home tab. For instance, you might want the "Vacation" pay code to be requested, but it would not make sense for the "Sick" pay code to be requested.
Balance Enabled	If enabled, a balance will be tracked for this pay code. This only applies to Leave pay codes, such as Vacation. Hours recorded against this pay code will automatically be deducted from the associated balance. The Employee Balances topic has more information.

Color	The color is used on employee calendars when shading days with leave requests or holidays. Employee calendars appear on the Home tab or the Employees tab.
Notes	Notes about this pay code, up to 2000 characters.

In addition to the above properties, the following advanced options are available:

Property	Description
Has report column	Checking this option will create a database column that will store the number of hours for this pay code for each time entry. This makes it easy to add a column to timesheet reports to display the total for this pay code (otherwise a SQL expression needs to be used). The drawback is that this will increase storage requirements by a few bytes for each time entry, so you don't want to enable this for more than a handful of pay codes.

Permissions

Permissions allow you to restrict which pay codes employees can access on their timesheets. Employees with a **Permission Level** that gives them only limited viewing permission, for instance, will only be able to access pay codes for which they have been added to the permission list.

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Timesheet Templates

Timesheet templates define the type and layout of time entry fields for employee timesheets. You can create any number of timesheet templates, which gives you great flexibility in the types of timesheets you assign to employees. For instance you might require hourly workers to record their start and finish times, whereas others might just track total hours.

Timesheet templates are assigned to an employee from the Employee Details page. See the [Managing Employees](#) topic for more information.

Timesheet templates have the following properties:

Property	Description
Name	The template name, up to 80 characters. A value is required and must be unique for all templates.
Description	A description for the template, up to 255 characters.
Status	The template status, either Active or Inactive. You cannot delete templates that are currently assigned to employees. Setting the status to inactive will prevent the template from being assigned to new employees.
Time Period	The time period for this template. The Time Periods topic has more information.
Default	This determines whether this template is the default timesheet template for new employees.
Timesheet Fields	<p>The list of time entry fields that appear in the main section of the timesheet. The fields will appear in the order specified. For each field you can specify the following options:</p> <p>Work Only: If checked, this field will only be shown on work rows, otherwise it will be shown on both work and leave rows.</p> <p>Required: If checked then a value is required for this field. If no value is provided then timesheet will generate an error message and will be prevented from being submitted.</p>
Detail Fields	The list of time entry fields that appear in the Details section of the timesheet. The fields will appear in the order specified. As for timesheet fields above, you can specify whether each field is Work Only or Required.
Total Fields	The list of fields that appear in the Totals section of the timesheet.

The following time entry fields are available (as well as any custom fields you may have created):

Property	Description
Start	The start time for the time entry. Times are entered in the format appropriate for the employee's locale.
Finish	The finish time for the time entry. Times are entered in the format appropriate for the employee's locale.
Hours	The number of hours for the time entry. The format can be entered in either decimal or hh:mm format.

Pay Code	The pay code for the time entry.
Reporting Group	The employee group associated with this entry. If not entered from the timesheet then pulled from the employee's profile. This value may also be called the Cost Center or Department, depending upon your organization (see the Terminology topic for more information).
Customer	The customer for the time entry.
Project Group	The project group for the time entry.
Project	The project for the time entry.
Task Group	The task group for the time entry.
Task	The task for the time entry.
Bill Rate	The bill rate for the time entry. If not entered from the timesheet then the value is pulled from the appropriate object as per the Bill Rate Options settings. See the Rate Options topic for more information.
Bill Amount	The bill amount for the time entry. If not entered from the timesheet then computed as $\text{Bill Amount} = \text{Hours} \times \text{Bill Rate}$. If entered from the timesheet then the Bill Rate will be computed as $\text{Bill Rate} = \text{Bill Amount} / \text{Hours}$.
Pay Rate	The pay rate for the time entry. If not entered from the timesheet then the value is pulled from the appropriate object as per the Pay Rate Options settings. See the Rate Options topic for more information.
Pay Amount	The pay amount for the time entry. If not entered from the timesheet then computed as $\text{Pay Amount} = \text{Hours} \times \text{Pay Rate}$. If entered from the timesheet then the Pay Rate will be computed as $\text{Pay Rate} = \text{Pay Amount} / \text{Hours}$.
Notes	A text field for notes about this entry.

You can also define any number of custom fields for use on the timesheet template. Timesheet custom fields are configured from the System > Templates > Manage Custom Fields page. Once you create the custom fields they will show up in the list of available fields for the template.

You can preview what the timesheet will look like by clicking the **Preview** button on the Timesheet Template Details page.

Asset Tracking

If Asset Tracking is enabled (see the [Asset Tracking Options](#) topic) then you can configure which types of assets can be entered from this template. Being able to configure which assets can be entered from the timesheet template gives you great flexibility in who can input asset entries in your organization. For instance, you may only want to have field crews keep track of equipment usage, which you could do by giving the field crew their own timesheet template with equipment entry enabled.

Advanced Settings

Advanced settings allow you to control some less common aspects of time entry:

Property	Description
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Time Entries Allowed	This option allows you to limit time entries on for this timesheet template to just work or leave. For instance, if you are only tracking leave or time off you would set this value to "Leave".
Time Entry Mode	This determines whether the employee enters hours on their timesheet (Standard), enters time as a percent of their total time spent working (Percent Time Entry), or just checks whether they were present or absent (Presence/Absence Time Entry).
Attendance Entry	If this option is checked then the Attendance Widget will be shown at the top of the timesheet. This option is only useful if you are not capturing start and finish times on the timesheet itself.
Attendance Hours	If Attendance Entry is enabled you can use this property to require whether attendance hours must match timesheet hours. Users will not be able to submit their timesheets unless the hours match if this option is set.

Submit Message

You can create a custom message that the employee is presented with when they submit their timesheet:

Property	Description
Submit Message	The custom message to present to the employee upon timesheet submit. If blank then no custom message is presented.

Policies

Policies are sets of rules governing the behavior of employee timesheets, leave accrual and more. You can create any number of policies and assign different policies to different employees. For instance, you might have one policy for exempt employees titled "Exempt Policy", and another policy for hourly employees named "Hourly Policy", each with different rule settings. Each employee must have a policy, which is specified in the [Employee Details](#) page.

Policies are composed of several sets of related rules. This includes **Time Entry Rules**, **Balance and Accrual Rules**, **Over Time Rules** and **Flex Time Rules**. Policies have the following properties:

Property	Description
Name	The policy name, up to 80 characters. A value is required and must be unique for all policies.
Description	A description for the policy, up to 255 characters.
Status	The policy status, either Active or Inactive. You cannot delete policies that are currently assigned to employees. Setting the status to inactive will prevent the policy from being assigned to new employees.
Default	This determines whether this policy is the default policy for new employees.

Policy Rules

- [Time Entry Rules](#)
- [Schedule Rules](#)
- [Flex Time Rules](#)
- [Balance and Accrual Rules](#)
- [Over Time Rules](#)
- [9/80 Over Time Rules](#)
- [Work Shift Rules](#)
- [Wage Rules](#)
- [Absence Points Rules](#)

Time Entry Rules

Time entry rules can be used to control how many hours an employee can enter on a timesheet, whether time entries are rounded or not, and many other options. If any rule is violated an error will appear on the timesheet, and the timesheet cannot be submitted for approval until the rule violation is corrected.

Hours Checks are rules that restrict how many hours employees may enter on their timesheet:

Rule	Description
Minimum hours per work day	The minimum number of hours that should be entered each work day. This rule is checked when the timesheet is submitted, and counts both work and leave hours in the day total. For example, if you enter 8.00 hours for this value then the employee must record 8 hours of work, sick, vacation, etc. for each day of the work week, or they will not be able to submit their timesheet. What is considered a work day is determined by the employee's Scheduled Work Days property on their employee properties page. See the Managing Employees topic for more information.
Maximum hours per day	The maximum number of hours (both work and leave) that can be entered per day.
Minimum hours per week	The minimum number of hours that can be entered per week. This rule is checked when the timesheet is submitted, and counts both work and leave hours in the week total.
Maximum hours per week	The maximum number of hours (both work and leave) that can be entered per week.
Minimum hours per period	The minimum number of hours that can be entered per period. This rule is only useful for timesheet periods that are longer than one week. This rule is checked when the timesheet is submitted, and counts both work and leave hours in the period total.
Maximum hours per period	The maximum number of hours (both work and leave) that can be entered per period. This rule is only useful for timesheet periods that are longer than one week.

Leave Checks are rules that restrict how many hours of leave employees may take on any given day:

Rule	Description
[Leave] minimum hours per day	If an employee puts non-zero [Leave] hours on their timesheet, this is the smallest amount that can be taken in one day. For instance, if the employee enters 2.00 hours of Vacation on their timesheet, and the minimum is set to 4.00, they will see an error message when saving the timesheet, and will need to fix the entry before they can submit the timesheet.
[Leave] maximum hours per day	The maximum [Leave] hours that can be taken in one day. For instance, if the employee enters 9.00 hours of Vacation on their timesheet, and the maximum is set to 8.00, they will see an error message when saving the timesheet, and will need to fix the entry before they can submit the timesheet.

[Leave] can't be taken until employed for	The probationary period or number of days an employee must be employed before they can take [Leave] hours. This rule requires that the employee's "First Day" property must be set in their employee profile. When this rule is enabled the employee will not be able to make [Leave] requests or enter [Leave] on their timesheet until after the specified number of days of employment.
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In the above table [Leave] means any of your configured leave pay codes, e.g. Holiday, Vacation, etc. You will be able to configure each pay code separately.

Note that if you set the minimum and maximum hours described above to be the same value for a given pay code, this implies the employee cannot take a partial day of leave. When generating a leave request for the given pay code the employee will not see the "Partial Day" option.

Rounding rules allow you to control whether and how time entries are rounded:

Rule	Description
Round time entries to	<p>The number of minutes to round time entries to, for example 15. If the timesheet template has the Start and Finish fields, then the start and finish times will be rounded. If the timesheet template has only the Hours field then the hours will be rounded.</p> <p>Note that if you want to keep track of the original or unrounded start and finish times you need to add the "Actual Start" and "Actual Finish" custom fields, as described in the note below.</p>
Rounding Mode	<p>How rounding is done, either Nearest, Round Up or Round Down.</p> <p>Nearest:</p> <p>The Nearest rounding mode will round the start and finish time of a punch to the nearest rounding increment. For example, if rounding is to 15 minutes then 8:07 will round to 8:00 and 8:08 will round to 8:15. For timesheets that are only recording hours (no start/finish times) then the hours entered will be rounded to the nearest rounding value, instead of the start and finish times.</p> <p>Round Up</p> <p>The Round Up rounding mode will round the start and finish time of a punch to the next rounding increment. For example, if rounding is to 15 minutes then 8:01 will round to 8:15 and 8:16 will round to 8:30. For timesheets that are only recording hours (no start/finish times) then the hours entered will be rounded to the next rounding increment, instead of the start and finish times.</p> <p>Round Down</p> <p>The Round Down rounding mode will round the start and finish time of a punch to the prior rounding increment. For example, if rounding is to 15 minutes then 8:14 will round to 8:00 and 8:16 will round to 8:15. For timesheets that are only recording hours (no start/finish times) then the hours entered will be rounded to the prior rounding increment, instead of the start and finish times.</p>

<p>Round punch-in to scheduled start time</p>	<p>Checking this option will round punch-ins to the employee's scheduled start time if the punch is within the specified minutes of the scheduled start time. For example, if you specify that punches 15 minutes or less before the scheduled start time be rounded to the start time, and the employee is scheduled to start at 9:00AM, then a punch of 8:50AM will be rounded to 9:00AM. However, a punch of 8:40AM will not be rounded. This rule is useful if you want to prevent employees from recording more than their scheduled number of hours, even if they come in a few minutes early.</p> <p>If the regular rounding rule is also enabled (for example, round punches to the nearest 15 minutes), then the regular rounding rule will only run if the punch does NOT fall within the specified minutes of the scheduled start time.</p> <p>The employee's scheduled start and finish times are specified in their profile. See the Managing Employees topic for more information.</p>
<p>Round punch-out to scheduled finish time</p>	<p>Checking this option will round punch-outs to the employee's scheduled finish time if the punch is within the specified minutes of the scheduled finish time. For example, if you specify that punches 15 minutes or less after the scheduled finish time be rounded to the finish time, and the employee is scheduled to finish at 5:00PM, then a punch of 5:10PM will be rounded to 5:00PM. However, a punch of 5:20PM will not be rounded. This rule is useful if you want to prevent employees from recording more than their scheduled number of hours, even if they leave a few minutes late.</p> <p>If the regular rounding rule is also enabled (for example, round punches to the nearest 15 minutes), then the regular rounding rule will only run if the punch does NOT fall within the specified minutes of the scheduled finish time.</p> <p>The employee's scheduled start and finish times are specified in their profile. See the Managing Employees topic for more information.</p>

Note: If you want to preserve the original or unrounded start and finish times you need to add the following timesheet custom fields to Pacific Timesheet:

Custom Field	Type	Description
Actual Start	Time	This field holds the unrounded or original start timestamp. Note that you must create this field exactly as named, "Actual Start", in order to create the expected underlying database field (t_timeentry.xactualstart). After creating the field you can then rename it as this will not affect the name of the underlying database field.
Actual Finish	Time	This field holds the unrounded or original finish timestamp. Note that you must create this field exactly as named, "Actual Finish", in order to create the expected underlying database field (t_timeentry.xactualfinish). After creating the field you can then rename it as this will not affect the name of the underlying database field.

Timesheet custom fields are configured from the System > Templates > Manage Custom Fields page. It is not required that you put these fields on the timesheet templates themselves - their value will still be filled in and you can report on them like any other timesheet field.

Meal Deduction rules allow you to automatically deduct meal time from punches:

Rule	Description
Automatic meal deduction	Check this option to automatically deduct the specified minutes from time entries. You might specify, for instance, that 30 minutes are deducted from time entries that are 8 or more hours. This is done by splitting the time entry into two parts, and taking the deduction from the middle of the time entry. In this way the employee's start and finish times, if entered, are always preserved.
Apply to entries at least	If automatic meal deduction is enabled then you need to specify the smallest punch that gets a meal deduction. For instance, you may only want a meal deduction for time entries that are 8 hours or larger.
Maximum deductions per day	You can limit how many automatically generated meal deductions an employee is allowed per day with this setting.

Note that the punch having the meal deducted will be split into two punches, with a meal break in the middle. In this way the punch in and out times are preserved. The meal will fall in the middle of the punch, starting at the nearest whole hour.

Splitting rules are sometimes needed for certain payroll applications:

Rule	Description
Automatic midnight split	Check this option if you want punches that span midnight to be split into two punches - one ending on midnight and one starting at midnight. This will prevent hours that are worked after midnight from being booked to the timesheet period in which the punch was started.

Default Timesheet rules control which timesheet period an employee is presented with when they log into Pacific Timesheet:

Rule	Description
Default Timesheet	Check this option if you want to change the default timesheet period that loads when an employee logs in. Normally the current timesheet is presented, but you can alternatively have the previous timesheet, if not submitted, be presented. The mandatory option is for cases where you want the employee to fill out and submit their previous timesheet before moving to a new one.

Miscellaneous rules:

Rule	Description
Don't allow submitting time for inactive Projects, Tasks etc.	<p>Check this option to enable an additional check when the timesheet is submitted that prevents employees from submitting time for inactive items such as projects or tasks. Pacific Timesheet already prevents users from choosing inactive items when adding new rows to their timesheet, and will not carry forward inactive rows if using the "timesheet memory" or "copy previous timesheet" features. However, this rule does an extra check to catch any items that might have been inactivated after any rows were added to the timesheet.</p> <p>For objects such as Projects and Tasks that have Actual Start Date and Actual Finish Date properties, this rule will take those values into consideration. For instance, an error will be presented to a user if they try to save a time entry for a date that falls after a project's last day, regardless of whether the project's status property is currently set to active or inactive.</p> <p>Note that this rule will only run for the previous and current timesheet periods to avoid difficulty if a manager retroactively edits an older timesheet.</p>
Autofill	<p>Autofill will automatically add work hours to a timesheet when it is submitted to make it match the employee's scheduled hours. For this to work the employee's scheduled hours per week property must be set in their profile. The adjustment work entry will be added to the last day of the timesheet period.</p> <p>This setting is useful for salaried employees who may be only tracking leave, but the back-end payroll system requires their total hours total to, say, 40 each week.</p>

Schedule Rules

Schedule rules can be used to prevent employees from entering more or less hours than they are scheduled for. You set an employee's scheduled hours from the [Employee Details](#) page.

The following rules can be configured:

Rule	Description
Timesheet hours cannot be greater than scheduled hours	Requires the employee to put no more than their scheduled number of hours on the timesheet. The timesheet cannot be submitted until they correct this.
Timesheet hours cannot be less than scheduled hours	Requires the employee to put no less than their scheduled number of hours on the timesheet. The timesheet cannot be submitted until they correct this.
Add Holidays to timesheet	If checked then any Holidays the employee can take will be put on their timesheet automatically. Note that if a holiday falls on a day the employee is not scheduled to work, no hours will be added to the timesheet. What is considered a work day is determined by the employee's Scheduled Work Days property on their employee properties page. See the Managing Employees topic for more information.
Add Leave requests to timesheet	If checked then approved Leave Requests will be put on the employee's timesheet automatically. Note that if leave falls on a day the employee is not scheduled to work, no hours will be added to the timesheet for that day. What is considered a work day is determined by the employee's Scheduled Work Days property on their employee properties page. See the Managing Employees topic for more information.
Don't allow submitting of Leave requests with conflicting or overlapping dates	If checked then employees will not be able to submit leave requests that conflict with other leave requests they may have submitted for the same dates.
Don't allow submitting of Leave requests if balance falls below minimum	If checked then employees will not be able to submit leave requests that if the balance for the selected pay code (e.g. Vacation) would fall below the minimum allowed. If the pay code has no balance associated with it then this setting is ignored. The minimum balance allowed is specified on the Balance and Accrual Rules page.

Flex Time Rules

Flex Time Rules allow you to automatically accrue hours into the Flex Time balance when employees work more than a specified number of hours in a day or week. This allows employees to 'bank' these hours for use on later days.

Note: You can change the name from **Flex Time** to whatever you prefer (for example **Comp Time**) by simply renaming the Flex Time pay code on the System > Pay Codes page. You will be warned against modifying a built-in pay code, but renaming this will not cause any problems unless you have previously created work flows (such as timesheet exports) that rely on this name.

The following rules can be configured:

Rule	Description
Daily work hours over	<p>If enabled, then total work hours over this threshold in a single day will result in hours being added to the Flex time balance. The number of hours added depends on the Accrual Rate (see below). For example, if the daily threshold is 8 and the accrual rate is 1.5, then an employee who works 10 hours in one day will have 3.0 hours added to their Flex Time balance.</p> <p>You can override this daily threshold to specify values for each day of the week, too. For instance, you might specify a threshold of zero for Saturday and Sunday in order that any weekend work adds to the employee's Flex Time balance.</p> <p>You can cap how many hours over the threshold can contribute to the flex time balance by setting the Maximum Hours value next to each daily threshold. For instance, if the employee works a total of 5 hours over the threshold, but the maximum is 4, then only (4 x Accrual Rate) hours will be added to the Flex Time balance.</p>
Weekly work hours over	<p>If enabled, then total work hours over this threshold in a single week will result in hours being added to the Flex time balance. The number of hours added depends on the Accrual Rate (see below). For example, if the weekly threshold is 40 and the accrual rate is 1.5, then an employee who works 42 hours in one week will have 3.0 hours added to their Flex Time balance.</p> <p>This rule is processed after any daily rules, so that hours will not be double counted. That is, any daily limits will be processed first, and any hours over the daily limits will not add to the weekly total.</p> <p>You can cap how many hours over the threshold can contribute to the Flex Time balance by setting the Maximum Hours value next to the weekly threshold. For instance, if the employee works a total of 5 hours over the threshold, but the maximum is 4, then only (4 x Accrual Rate) hours will be added to the Flex Time balance.</p>

<p>Period work hours over</p>	<p>If enabled, then total work hours over this threshold in a timesheet period will result in hours being added to the Flex time balance. The number of hours added depends on the Accrual Rate (see below). For example, if the period threshold is 80 and the accrual rate is 1.5, then an employee who works 82 hours in the timesheet period will have 3.0 hours added to their Flex Time balance.</p> <p>This rule is processed after any daily and weekly rules, so that hours will not be double counted. That is, any daily and weekly limits will be processed first, and any hours over those limits will not add to the period total. This rule is only useful for timesheet periods that are longer than one week.</p> <p>You can cap how many hours over the threshold can contribute to the Flex Time balance by setting the Maximum Hours value next to the period threshold. For instance, if the employee works a total of 5 hours over the threshold, but the maximum is 4, then only (4 x Accrual Rate) hours will be added to the Flex Time balance.</p>
<p>Accrual Rate</p>	<p>The multiplicative factor used to determine how many hours will be added to the balance for every work hour over the specified limit. For instance, if the accrual rate is 1.5 and the employee works 2 hours over the limit, then 3.0 hours will be added to the balance. The accrual rate value defaults to 1.0, but can be any positive value.</p>

Balance and Accrual Rules

Balance and accrual rules control how balance limits and accruals are handled. Balances are associated with [Pay Codes](#), and can be enabled from the Pay Code properties page.

Note: If automatic accruals are enabled and you are not seeing the accruals you expect, please refer to the troubleshooting section below.

The following rules can be configured for each enabled balance:

Rule	Description
Minimum Balance	The minimum value for this balance, in hours. Employees will be alerted when their timesheet puts a balance below this value, and they will not be able to submit the timesheet.
Maximum Balance	The maximum value for this balance, in hours. The balance will be capped at this value. Note that if accrual is enabled (see below) this option will instead be entered in the accrual table.
Enable Accrual	Enables automatic accrual on this balance. Automatic accrual means the system will automatically accrue hours and perform rollovers to the employee's balance on a regular interval.
Accrual Period	<p>If accrual is enabled you should choose the appropriate accrual period. The accrual will happen before midnight on the last day of the period, making it available for the first day of next period. You can choose from any period you have defined in the System > General > Time Periods page, as well as the following special time periods:</p> <p><i>Hourly - For Every Hour Worked</i></p> <p>Hours are accrued before midnight on the last day of the timesheet period, based on the number of work hours recorded on the timesheet. The accrual calculation is performed when the timesheet is submitted.</p> <p><i>Yearly - Employee anniversary</i></p> <p>Hours are accrued at end of the anniversary year, in which the anniversary year starts on the month and day of the employee's first day of employment. For instance, if the employee started working on March 28, 2012, then anniversary years would look like:</p> <p>March 28, 2012 to March 27, 2013 March 28, 2013 to March 27, 2014 etc.</p> <p>The accrual would occur before midnight on March 27 of each period for this employee.</p>

When you enable accrual an accrual rate table will appear. You can specify accrual rates, etc. that vary by the number of years employed (if you don't have values that vary for the number of years employed then you will only need one row in the accrual table). You can

click the Add button to add as many rows as you need. Each row in the accrual table can have the following properties:

Property	Description
Years Employed	<p>The number of years of employment that this rate starts to take effect. If you only have one row in your accrual table this property will be hidden and default to zero, meaning the rate will apply to all employees using this policy, regardless of their years of employment.</p> <p>The number of years of employment is determined by the employee's First Day property (see the Employees topic for more details). If the employee's first day is not set then it is assumed to be zero years.</p>
Accrual Rate	The accrual rate for this balance, in hours. Accruals will be automatically granted before midnight on the last day of the specified accrual period.
Max. Work	This column only appears if the accrual period is set to "Hourly - For Every Hour Worked". This is the maximum number of work hours to consider when calculating the accrual, for example 40 for a weekly timesheet period, or 80 for a biweekly timesheet period. Leave this value blank if there is no maximum.
Maximum	The cap or maximum hours the balance can reach. Leave this value blank if there is no maximum.
Rollover	The maximum hours that can be carried forward each rollover period for this balance. The balance will be capped at this value just before midnight on the last day of the rollover period (generally December 31, but you can choose any rollover period you need to, as described below). Leave this value blank if there is no rollover.

You can specify several accrual/rollover options:

Rule	Description
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Rollover Period	<p>If a rollover value is specified in the accrual table (described above), you should choose the appropriate rollover period (it will default to Yearly starting on January 1). The rollover will happen before midnight on the last day of the period, making it effective for the first day of next period. You can choose from any period you have defined in the System > General > Time Periods page, as well as the following special time period:</p> <p><i>Yearly - Employee anniversary</i></p> <p>Rollover happens at end of the anniversary year, in which the anniversary year starts on the month and day of the employee's first day of employment. For instance, if the employee started working on March 28, 2012, then anniversary years would look like:</p> <p>March 28, 2012 to March 27, 2013 March 28, 2013 to March 27, 2014 etc.</p> <p>The rollover would occur before midnight on March 27 of each period for this employee.</p>
Rollover/accrual sequencing	<p>This controls whether the rollover runs <i>immediately before</i> or <i>immediately after</i> an accrual that would fall on the same date.</p> <p>For instance, if you are using annual accrual and annual rollover they will both occur on the last day, before midnight on December 31. You would likely want the rollover to happen <i>just before</i> the accrual, otherwise the employee would start the new year with no balance.</p> <p>However, if your accrual period is monthly, you might prefer the rollover to run <i>just after</i> the accrual, essentially acting as a sort of cap.</p> <p>How the sequencing of accrual and rollover is handled varies, so you will have to set this based on your organization's requirements.</p>
Move Excess Rollover Hours To	<p>If you specify a non-blank rollover value, you can have excess hours (hours over the rollover value) be added to a separate balance. For instance, you might set the annual rollover for the 'Sick Leave' balance at 0.00, and have any left-over hours be added to an 'Extended Sick Leave' balance.</p>
Forecast only	<p>If this option is checked then no accrual will actually be added to the employee's balance. The accrual settings will only be used in forecasting an employee's available hours when requesting leave (for instance from the Home > New Leave Request page). You would only want to check this option if you are importing or synchronizing your balances from an external payroll or HR system (that is, an external system is calculating your accruals).</p>

Troubleshooting Automatic Accruals

If you are not seeing the expected accruals or rollovers for your employees please review

the following troubleshooting steps before contacting support:

1. Make sure that the employee has the correct policy in their employee profile, and that the policy has accruals enabled.
2. If no accrual is happening, make sure the "Forecast only" option is not checked. Also make sure the correct accrual rate is specified in the accrual rate table.
3. If the accrual is happening but an incorrect rate is being used, make sure the correct "First Day" property is set in the employee's profile.
4. For non-yearly accrual periods, employees who have been employed for less than one accrual period (for example, an employee started a week ago but the accruals happen every month) will not trigger an accrual. That is, the system will not give them a partial or pro-rated accrual for working a partial accrual period. You can always specify an initial balance for the employee if need be, from the Current Balances section of their employee profile page. For yearly accrual periods the accrual will happen even if the employee has been employed less than one year. For these employees you can pro-rate or provide a partial accruals by specifying accrual rates for partial years.
5. Understand that the accrual or rollover is not generated until the last day of the period, just before midnight. Any changes you make to an employee's accrual rules will not take effect until the end of the subsequent accrual or rollover period. If you add a new employee whose first day is before the current date, you may need to specify an initial balance as the system will not go back in time and generate past accruals and rollovers.
6. This is for self-hosted customers only: As the system generates accruals and rollovers just before midnight at the end of the period, you need to make sure the Pacific Timesheet service is running. If you shut down the computer or service at night then the accruals or rollovers might not happen. You can shut down or restart the computer for maintenance needs, but in general you want to leave it running overnight in order for the accruals, rollovers and other background processes to run.
7. There might be cases where you need to rerun accruals and rollovers for a past period of time for a large number of employees. Pacific Timesheet has a utility to rerun your current accrual settings for a past time period. Please contact support@pacifictimesheet.com for a solution document outlining how to use this utility to rerun past accruals and rollovers.

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Over Time Rules

Over time rules allow you to automatically compute over time and double time on employee timesheets.

Note: Make sure you do not turn on both the regular over time rules and the 9/80 over time rules for the same policy. There should be at most ONE type of over time rules enabled for a policy.

The following rules can be configured for **over time** and **double time**:

Rule	Description
Daily work hours over	Any work hours over this amount in a single day will be marked as over time. You can override this value and specify individual values for each day of the week, too.
Weekly work hours over	Any work hours over this amount in a week will be marked as over time, after the daily rule is processed.
Period work hours over	Any work hours over this amount in a timesheet period will be marked as over time, after the weekly rule is processed. This rule is only useful for timesheet periods that are longer than one week.

Note that rules are processed in the above order, and that double time rules are processed after all over time rules are processed.

The following rules can be configured to handle **consecutive days**:

Rule	Description
Consecutive days rules start after	The number of consecutive days of work before the consecutive days rules are applied. This can include days worked prior to the current week (the "consecutive days" option), or only consecutive days with the work week (the "consecutive days in a work week" option).
Work hours over [] are Over Time	Any work hours over this amount on a consecutive day will be over time.
Work hours over [] are Double Time	Any work hours over this amount on a consecutive day will be double time.

The following rules can be configured to handle **holiday work**:

Rule	Description
Work hours on 'holidays'	If checked then work hours on 'holidays' will be converted to over time (or double time, depending upon your selection). 'Holidays' are any days with hours for the selected pay codes (by default simply the Holiday pay code).

Partial day holidays are also handled by the holiday work rule. A day is considered to be a partial day holiday if the number of holiday hours is less than the employee's scheduled hours. For example, if an employee is scheduled to work 8 hours and has a holiday of 4 hours, then it is expected that the employee would work 4 hours. Only work hours beyond the 4 hours will be converted to over time.

Options allow you specify additional time entry pay codes that you would consider as regular work hours. For instance, some organizations consider Holiday hours to contribute to the total regular hours. If so, you would add the Holiday pay code to the list.

Example

As an example, here is how California, U.S. over time rules would be configured:

Over Time Rules:

Daily work hours over [8.00]
 Weekly work hours over [40.00]

Double Time Rules:

Daily work hours over [12.00]
 Weekly work hours over [60.00]

Consecutive Days Rules:

Consecutive days rules start after: [6] [consecutive days in a work week]
On those consecutive days:
Work hours over: [0.00] are Over Time
Work hours over: [8.00] are Double Time

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9/80 Over Time Rules

9/80 or compressed schedules allow employees to work more hours in the first 9 days of a 10 day (two week) work period, then take the last day off. For instance, rather than working 40 hours each week, employees could work 44 hours in the first week, then 36 hours in the second week, with that final Friday off. If you have employees working a compressed 9/80 work schedule you will want to use the 9/80 Over Time Rules rather than the regular [Over Time Rules](#). The 9/80 rules will correctly compute overtime for compressed weeks, taking into account hours worked in the previous week.

Note: You cannot enable both the regular **Over Time Rules** and the **9/80 Over Time Rules** for the same policy. There can be at most ONE type of over time rules enabled for a policy.

The following rules can be configured for computing over time:

Rule	Description
Weekly Hours	The maximum number of work hours per week considered "regular time", for example 40. Work hours over this value in a single week will be considered over time.
Midpoint	The time and day of the week that is considered the end of the week (or the midpoint of the two week cycle), for example Friday 12:00 noon. Hours worked after this will be counted for the next week. The selected day is usually taken off on the second week.
Leave	<p>You can optionally include specific leave pay codes in the overtime computation. For instance, you might want holiday hours to be considered work when computing overtime.</p> <p>Just as is done for work hours, any such leave will be split if it spans the midpoint, with the latter portion added to the subsequent week's totals. For example, if your midpoint is Friday 12:00 noon, and you have 8 hours of Holiday running from 8AM to 4PM on that Friday, then you will end up with 4 hours of Holiday in the first week and 4 hours in the second week.</p> <p>If you include leave in work hour totals you can control how this leave is handled when it falls on the "day off" in the two week period. For instance, if you normally take the second Friday off, you can configure the system such that any leave (e.g. holiday) hours on this day are ignored with respect to overtime calculations: the hours will not contribute to total work hours or be split at the midpoint.</p>

Important configuration notes:

1. If employees are not recording in/out times (just hours) then you need to specify the employee's "**Scheduled Start**" property in their profile for the compressed overtime rule to work properly. This is also true if you are including leave in overtime calculations. The scheduled start value is specified on the Employees properties page for each employee (or can be set in bulk via an import file).

2. If including leave in your overtime calculations you need to enable the database column for each leave pay code included. This is required in order for any split leave (leave that falls on the midpoint) to be stored properly. You enable the database column by editing each appropriate pay code on the Systems > Pay Codes page, clicking the Options link in the lower right corner, and checking the "**Has report column**" property.

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Work Shift Rules

Work shift rules are used to compute how many hours an employee worked fall into each defined work shift. Before setting up your work shift policies you need to define your work shifts, on the System > General > Work Shifts page. The [Work Shifts](#) topic has more information.

When configuring your work shift rules you can specify the following properties:

Rule	Description
Enabled Shifts	<p>This is the list of enabled work shifts for this policy. Work shifts are global objects, but you can selectively enable/disable different ones for each policy. For instance, you might have two different night shifts: one from 10PM-6AM for employees at one location, and one from 12AM-8AM at another location. You can then create two policies and enable the appropriate night shift for each policy.</p>
Shift Hours Depend On	<p>This property determines how a work time entry has its hours associated with the appropriate work shift. The possible options are:</p> <ol style="list-style-type: none"> 1. Each Shift Worked <p>Hours are proportioned into each shift that the time entry falls on. For instance, if all 8 hours are worked in Shift 1 then all 8 hours are associated with Shift 1. But, instead, if half the work was in Shift 1 and the other half in Shift 2 then each would get 4 hours.</p> <ol style="list-style-type: none"> 2. Largest Shift Worked <p>All work hours are put into the work shift that had the most hours. For instance, if an employee worked 8 hours, with 2 hours in Shift 1 and 6 hours in Shift 2, then Shift 1 would get zero hours and Shift 2 would get 8 hours.</p> <ol style="list-style-type: none"> 3. First Shift Worked <p>All work hours are put into the first work shift. For instance, if an employee worked 8 hours, with 2 hours in Shift 1 and 6 hours in Shift 2, then Shift 1 would get 8 hours and Shift 2 would get zero hours.</p>

Wage Rules

Wage rules help keep you in compliance with governmental rules regarding missed meals, split shifts and other work issues affecting employee wages and benefits.

Automatic Missed Meal Premium

Also called a "missed meal penalty", the automatic missed meal premium rule allows you to credit an employee with regular time hours (the premium) for every missed meal in a block of work. The following properties are supported:

Property	Description
Add	The number of regular hours (the premium) to add for every missed meal, for example 1.00. These hours are added to the regular time pay code for the time entry that incurred the missed meal.
For every	The minimum number of continuous hours that must be worked before a meal is considered missed, for example 5.00. Any hours worked over this value without a meal break will trigger the missed meal penalty.
Waive If	Waives the second missed meal if hours worked are over this value. If hours worked are over twice this value then no waive occurs. A blank value means no waive occurs.
Minimum Meal	The minimum number of hours that constitute a meal, e.g. 0.5 (30 minutes).
Adjust regular hours	If checked the missed meal hours (the premium) will be added to the regular time hours for the time entry.
Adjust pay amount	If checked the pay amount will be increased by the missed meal hours (the premium) * pay rate for the time entry.

Note: Only one missed meal premium will be computed each day.

The additional regular hours or premium is added to the employee's regular hours for the appropriate time entry. Also, the pay amount for that time entry will be increased by the appropriate amount (regular hours x employee's pay rate).

To make it easier to report on missed meal premiums, you can optionally define the following two custom timesheet fields: "Meal Penalty Hours" and "Meal Penalty".

The "**Meal Penalty Hours**" field is the number of regular hours (the premium) added. This is a **number** field, and is created from the System > Templates > Manage Custom Fields page. You must name the field **exactly** as shown (without the quotes). Once you have created the field, you can later edit it and change the name if desired without affecting operation.

The "**Meal Penalty**" is the premium (number of regular hours added) multiplied by the employee's pay rate. This is a **currency** field, and is created from the System > Templates > Manage Custom Fields page. You must name the field **exactly** as shown (without the quotes). Once you have created the field, you can later edit it and change the name if desired without affecting operation.

If you want to waive the missed meal calculation for a day you can create a **checkbox** custom field named "**Meal Penalty Waiver**" and put it on the timesheet details. If checked for a time entry that has a missed meal premium (visible by the comment added), then the

premium will be removed. You must name the field **exactly** as shown (without the quotes). Once you have created the field, you can later edit it and change the name if desired without affecting operation.

Calculation Notes

Meal penalties are computed using a California lab law approach in which total work hours are divided into blocks of, in the case of California, 5 hours. This can result in somewhat surprising behavior. For instance, let's suppose an employee works the following hours in a day:

In	Out	Hours
9:00AM	12:00PM	3.00
12:45PM	6:45PM	6.00

You might expect that the employee would be granted a missed meal premium for the second punch as it exceeds 5 hours. This would not be the case, however. The first 5 hour work block starts at 9:00AM and goes to 2:45PM (accounting for the meal break from 12:00PM to 12:45PM). As there was a meal break in that 5 hour block no penalty is granted. The next 5 hour block starts at 2:45PM (not 12:45PM!). As the employee clocked out at 6:45PM there are only 4 hours in this block, so no penalty is granted.

Missed Meal Premium Example

A typical example would be that of California:

Add: 1.00
 For Every: 5.00
 Waive If:
 Minimum Meal: 0.50

To waive the second meal in California the configuration would be:

Add: 1.00
 For Every: 5.00
 Waive If: 6.00
 Minimum Meal: 0.50

Automatic Split Shift Premium

The automatic split shift premium rule allows you to credit an employee with extra pay (the premium) for every split shift worked. A split shift is one in which a day's work is divided into two or more parts separated typically by at least one hour. The following properties are supported:

Property	Description
Shift separation	The number of hours between two work shifts that, if greater than this value, would indicate a split shift. In other words, if two work shifts in a single day have a time separation greater than this value then they are considered a split shift.
Minimum wage	The minimum wage used in computing the premium. The premium is computed according to the following formula: $\text{Premium} = M - ((E - M) \times H)$ Where M = Minimum pay, E = Employee's hourly rate and H = the number of hours worked.

The additional pay or premium is added to the employee's pay amount for the appropriate time entry.

To make it easier to report on split shift premiums, the additional pay or premium is also added to a timesheet custom field named "**Split Shift Premium**". You can create this field from the System > Templates > Manage Custom Fields page. You must create a currency field named **exactly** as shown (without the quotes). Once you have created the field, you can later edit it and change the name if desired without affecting operation.

If you want to waive the split shift calculation for a day you can create a **checkbox** custom field named "**Split Shift Waiver**" and put it on the timesheet details. If checked for a time entry that has a split shift premium (visible by the comment added), then the premium will be removed. You must name the field **exactly** as shown (without the quotes). Once you have created the field, you can later edit it and change the name if desired without affecting operation.

Split Shift Example:

A typical example would be a shift separation of 1 hour. Let's presume an employee works two shifts with more than 1 hour between them, for example:

8:00AM - 12:00PM - 4 Hours
2:00 PM - 6:00PM - 4 Hours

If the employee has a pay rate of \$10.00/hour, and the minimum wage is set to \$12.00/hour, then the premium or additional wage would be:

$$\text{Premium} = 12 - ((10 - 12) * 8) = 28$$

The employee would gain an additional \$28.00 pay.

Absence Points Rules

Absence points rules will automatically compute demerit points based on employee tardiness and absence. You can tailor the rules so that different points can be added based on coming in late, leaving early, or for different types of absences (e.g. excused sick leave might be given different points than unexcused sick leave).

Absence points rules require the configuration of the following custom timesheet template fields:

Custom Field	Type	Description
Absence Points	Number	This field holds any absence points incurred. The number of decimal digits depends upon your needs - if you allow fractional points then you will want to set an appropriate number, e.g. 2. Note that you must create this field exactly as named, "Absence Points", in order to create the expected underlying database field (t_timeentry.xabsencepoints). After creating the field you can then rename it as this will not affect the name of the underlying database field.
Absence Reason	List	<p>This field allows managers to specify an absence reason for leave taken by employees. For instance, you may have the reason "Excused" for excused absence, and the reason "Unexcused" for unexcused absence. Each reason can result in different points being added (see the Absence rule below). Note that you must create this field exactly as named, "Absence Reason", in order to create the expected underlying database field (t_timeentry.xabsencereason). After creating the field you can then rename it as this will not affect the name of the underlying database field.</p> <p>Note that the list of reasons can have different absence points configured for each reason. If you add or rename any of the reasons in the list you will need to edit the points again in the absence rule. See the Absence rule below for information on how to configure points for each absence reason.</p>
Absence Override	Check Box	This field provides a way for the manager to override or manually enter absence points on employee timesheets. By checking the Absence Override check box the manager can change or enter points into the Absence Points field. Note that you must create this field exactly as named, "Absence Override", in order to create the expected underlying database field (t_timeentry.xabsenceoverride). After creating the field you can then rename it as this will not affect the name of the underlying database field.
Absence Extra (Optional)	Text, Text Area, List	The Absence Extra field is optional and can be used to record additional information about the absence. For example, you may provide a list off additional reasons for the absence, e.g. Medical Appointment, Plant Injury, etc. Alternatively, you could simply have it be a text area for entering additional details about the absence. Note that you must create this field exactly as named, "Absence Extra", in order to create the expected underlying database field (t_timeentry.xabsenceextra). After creating the field you can then rename it as this will not affect the name of the underlying database field.
Warning Type	Text, List	This field allows you specify that a warning was given to the employee, and is generally a list of values such as Verbal, Written, etc. Note that you must create this field exactly as named, "Warning Type", in order to create the expected underlying database field (t_timeentry.xwarningtype). After creating the field you can then rename it as this will not affect the name of the underlying database field.

The following absence rules can be configured:

Property	Description
Absence rule	<p>If enabled then points will be added when leave hours are entered on the timesheet. The number of points added depends on the selected Absence Reason. For instance you might configure 0 points for the reason "Excused", and 5 points for the reason "Unexcused". If no reason is selected then no points will be added by the rule.</p> <p>Note that if the list of absence reasons is changed (by editing the Absence Reason custom field), then the points will need to be entered for any new or renamed absence reasons.</p>
In-late rule	<p>If enabled then points will be added depending upon how many minutes late the employee came in. The employee must have the Scheduled In property set in their profile in order for this rule to work. You can enter multiple levels of points, e.g. 2-5 minutes = .5 points, 6-15 minutes late = 1 point, etc.</p>
Out-early rule	<p>If enabled then points will be added depending upon how many minutes early the employee left. The employee must have the Scheduled Out property set in their profile in order for this rule to work. You can enter multiple levels of points, e.g. 2-5 minutes = .5 points, 6-15 minutes late = 1 point, etc.</p>
Too-few-hours rule	<p>If enabled then points will be added depending upon how much less than the scheduled hours of work were performed in any given day. The scheduled hours will be taken from the Scheduled Hours Per Day property in the employee's profile, if set, or from the default Hours Per Day property on the System > General page.</p> <p>Points can be configured in two ways based on the "Use percent of scheduled hours" check box. If this check box is checked then how many points are incurred will depend upon the percentage of scheduled hours worked, for example 0-50% = 1 point, 51-99% = .5 points and 100% = 0 points.</p> <p>If the "Use percent of scheduled hours" check box is not checked then the points incurred will depend upon the number of minutes early the employee left, for example 2-5 minutes = .5 points, 6-15 minutes = 1 point, etc.</p>
Too-long-meal-break rule	<p>If enabled then points will be added depending upon how many minutes beyond the specified meal break the employee takes. A meal is considered any gap more than 15 minutes long between two blocks of work. If there is more than one gap between blocks of work in one day then the longest one is assumed to be the meal break.</p> <p>Note that what is considered a day is determined by the employee's Scheduled Start and Scheduled Finish times (as specified in the employee's profile on the Employees tab). For a typical 9AM to 5PM schedule a day is from midnight to midnight. For someone working the late shift the day will be centered over their scheduled start and finish times, so may run from 12 Noon to 12 Noon. In this way the system will not inadvertently consider a meal break to be the end of a day's work.</p>

The following global options can be set:

Property	Description																																				
Default reporting period	<p>The default time period to use when reporting employee absence points. This can be overridden by the person viewing the report, but is handy to ensure that the various reports default to an appropriate date range for your business, such as "Last 365 Days".</p> <p>Note that the absence points shown on the Home tab will always be for the default reporting period. If the employee wants to view points for other periods they can click the points link to view a details report and change the reporting period.</p>																																				
Minimum/maximum total points allowed in period	<p>Enter non-blank numeric values if you want to keep absence points for employees from going below or above specified values. For instance, if you do not want absence points to be less than zero you would enter "0" for the "minimum total points allowed" field. Note that the minimum and maximum values do not affect the individual absence point entries the employees receive. Instead, the min/max rule is used when computing the total absence points for an employee when you run the Absence Points report on the Employees > Absence Points page.</p> <p>As an example, suppose an employee had accumulated the following absence points over the current year, and no minimum total points were specified:</p> <table style="margin-left: 40px;"> <thead> <tr> <th>Date</th> <th>Points</th> <th>Total Points</th> </tr> </thead> <tbody> <tr><td>Jan 1</td><td>1.00</td><td>1.00</td></tr> <tr><td>Mar 3</td><td>-2.00</td><td>-1.00</td></tr> <tr><td>Feb 7</td><td>1.00</td><td>0.00</td></tr> <tr><td>Apr 22</td><td>1.00</td><td>1.00</td></tr> <tr><td colspan="2">=====</td><td>1.00</td></tr> </tbody> </table> <p>The total for the year if no minimum is set would be 1.00. If you now specify a minimum total points of 0.00 then you get the following total points:</p> <table style="margin-left: 40px;"> <thead> <tr> <th>Date</th> <th>Points</th> <th>Total Points</th> </tr> </thead> <tbody> <tr><td>Jan 1</td><td>1.00</td><td>1.00</td></tr> <tr><td>Mar 3</td><td>-2.00</td><td>0.00</td></tr> <tr><td>Feb 7</td><td>1.00</td><td>1.00</td></tr> <tr><td>Apr 22</td><td>1.00</td><td>2.00</td></tr> <tr><td colspan="2">=====</td><td>2.00</td></tr> </tbody> </table> <p>As you can see, the total points is now 2.00, but the individual points entries were not altered.</p>	Date	Points	Total Points	Jan 1	1.00	1.00	Mar 3	-2.00	-1.00	Feb 7	1.00	0.00	Apr 22	1.00	1.00	=====		1.00	Date	Points	Total Points	Jan 1	1.00	1.00	Mar 3	-2.00	0.00	Feb 7	1.00	1.00	Apr 22	1.00	2.00	=====		2.00
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=====		2.00																																			
Warning Threshold	<p>The number of points beyond which you will be suggested to give a warning to the employee. This is used on the Absence Points dashboard on the Employees tab to suggest whether any action should be taken for a given employee in the report.</p>																																				

Adjusting Points

Managers and administrators can view and adjust absence points for individual employees. This is done by viewing the Absence Points dashboard on the employee's profile page (note

that the Absence Points dashboard only appears for employees that have the Absence Points Rules enabled on their employee policy). By clicking the **Add Adjustment** button you can enter positive or negative absence points for specific dates. Adjustments can be deleted by clicking the delete **[-]** button on each adjustment row on the dashboard.

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Security

The security page allows you to control security-specific application settings, such as authentication and password policies. Security has the following properties:

Property	Description
Expire Idle Sessions After	The number of minutes of inactivity allowed before a login expires.
Authentication Type	<p>Multiple types of authentication are supported through a pluggable authentication architecture. The following authentication types are provided in the base product package:</p> <ul style="list-style-type: none"> • Standard • LDAP/Active Directory <p>Refer to the appropriate topics below for more information on configuring these authentication types.</p>

Standard Authentication

Standard authentication provides basic login management and strong password support from within the application - no external authentication sources are required. Passwords are stored securely in the database using a one-way encryption algorithm. Standard authentication has the following properties:

Property	Description
Maximum Invalid Login Attempts	The maximum number of invalid login attempts before the account is locked. Locked accounts must be either unlocked by an administrator, or can be unlocked by the user by requesting a new temporary password. To disable this feature enter a blank value.
Maximum Password Age	The number of days before employees are asked to create a new password. To disable this feature enter a blank value.
Maximum Password History	Password history keeps employees from reusing previous passwords. Enter the number of passwords you want to keep in the history, or blank to disable this feature.
Minimum Password Length	The minimum number of characters allowed in new passwords. To disable this feature enter a blank value.
Minimum Lower Case Characters	The minimum number of lower case characters allowed in new passwords (a..z). To disable this feature enter a blank value.
Minimum Upper Case Characters	The minimum number of upper case characters allowed in new passwords (A..Z). To disable this feature enter a blank value.
Minimum Numeric Characters	The minimum number of numeric characters allowed in new passwords (0..9). To disable this feature enter a blank value.
Minimum Special Characters	The minimum number of special characters allowed in new passwords (for example !,\$#,%). To disable this feature enter a blank value.

LDAP/Active Directory Authentication

LDAP/Active Directory authentication allows you to authenticate employees against an LDAP (Lightweight Directory Access Protocol) server. This includes Microsoft Active Directory when it is configured with LDAP support (see the notes below).

LDAP/Active Directory authentication has the following properties:

Property	Description
LDAP Server	The host name or IP address of the LDAP server.
LDAP Server Port	The port number of the LDAP server. The default port number is 389 (or 636 if using SSL).
Use SSL	Check this option if you want to connect to the LDAP server using SSL (Secure Socket Layer). This option will increase your security by encrypting all communications between the timesheet application and the LDAP server. Your LDAP server must be configured for SSL for this to work.
Login	The login name of a technical or administrative user, if this LDAP server requires authentication. Depending upon your directory server a simple login name might work, such as "Directory Manager", or you might need to enter a distinguished name such as "CN=ADMINISTRATOR,CN=USERS,DC=PACIFICTIMESHEET,DC=COM". Note that for some Active Directory installations you need to enter this in upper-case. Another variant for Active Directory is of the form admin@pacifictimesheet.com. This is the SAM account name followed by the domain of the Active Directory server.
Password	The login password.
Search Base	The LDAP search base, which determines where a search for employees will start. This is a distinguished name (DN), such as "DC=pacifictimesheet,DC=com".
Search Filter	The LDAP search filter, which is used to find employees in the directory. The value depends on the type of directory server and how it is configured. For many open source LDAP servers the following will work: (&(objectClass=inetOrgPerson)(uid={0})) For Microsoft Active Directory the following will generally work: (&(objectClass=user)(sAMAccountName={0}))
Logging	Check this option to help troubleshoot authentication failures. The log files can be viewed with a text editor, and are located in the <PacificTimesheet>/tomcat/logs directory.

You can test these settings by clicking the "Test Configuration" button. This will connect to the specified LDAP server and perform a search, reporting any errors that arise.

When using LDAP/AD authentication you still need to have an employee account in Pacific Timesheet for each employee that will use the system. If an employee has an LDAP/AD login but does not have a Pacific Timesheet login they will not be able to log in into Pacific Timesheet. The LDAP/AD account is linked to the Pacific Timesheet account via the employee's login name. For instance, if using AD you might be using the sAMAccountName

attribute to link to Pacific Timesheet (see the Search Filter property, above). So if the sAMAccountName attribute is "jjones" then the Pacific Timesheet login name needs to be "jjones", too.

What if you want to use the employee's email address as the login, but your Active Directory (AD) sAMAccountName attribute is not an email address? Then you can refer to another AD attribute, such as "mail", by altering the Search Filter property described above. For example instead of using (&(objectClass=user)(sAMAccountName={0})) you could instead use (&(objectClass=user)(mail={0})).

In the event of an LDAP failure, such as the directory server being unavailable, or no matching user account being found in the directory, Pacific Timesheet will fail over to standard authentication. The entered login name and password will be checked against the Pacific Timesheet database. This ensures an administrator will still be able to log in using the Pacific Timesheet account, and change the LDAP settings if need be. This also allows you to have accounts in Pacific Timesheet that are not in the directory server, such as 'admin'.

When using LDAP authentication your employees will no longer see the "Change Password" link on their home page (unless an LDAP failure occurred and the standard authentication was used instead, as described above).

Microsoft Active Directory Notes

You will need to enable LDAP support in Active Directory (AD). Then add the object classes and related attributes for the "inetOrgPerson" and "groupOfUniqueNames" object classes to the Active Directory schema by using the Active Directory Management Console snap-in, ADSIEdit. "groupOfUniqueNames" is defined in RFC 2256, "inetOrgPerson" in RFC 2798.

Pacific Timesheet employee accounts are linked to AD accounts via the SAM account name ("sAMAccountName" attribute) by default. You can use a different attribute, e.g. "mail", by entering a custom Search Filter value, as described above. This is useful, for instance, if you are using email addresses for the Pacific Timesheet logins.

Related Topics

- [Permission Levels](#)
- [Permission Lists](#)

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Permission Levels

Permission levels have the following properties:

Property	Description
Name	The name of the permission level, up to 80 characters.
Description	A description of the permission level, up to 255 characters.
Status	The status determines whether the access level appears in lists or not. This is useful if you cannot delete an access level because it is in use by one or more employees.

Object permissions include:

Permission	Description														
View	Determines whether an employee with this permission level can view all or a limited subset of the objects. If set to limited then the employee must be assigned to the individual objects you wish them to see.														
Report	Determines whether an employee with this permission level can report on all or a limited subset of the objects. If set to limited then the employee must be assigned to the individual objects you wish them to report on.														
Manage	<p>Determines whether an employee with this permission level can manage all or a limited subset of the objects. If set to limited then the employee must be assigned to the individual objects you wish them to manage. Management permissions include:</p> <table border="1"> <tbody> <tr> <td>Edit</td> <td>Can change properties of the object.</td> </tr> <tr> <td>Edit Advanced</td> <td>Can change advanced properties of the object, which generally means anything involving bill, pay and other monetary rates and amounts.</td> </tr> <tr> <td>Create</td> <td>Can create new objects of this type.</td> </tr> <tr> <td>Delete</td> <td>Can delete objects of this type.</td> </tr> <tr> <td>Import</td> <td>Can import objects of this type.</td> </tr> <tr> <td>Export</td> <td>Can export objects of this type.</td> </tr> <tr> <td>Customize</td> <td>Can manage custom fields for objects of this type.</td> </tr> </tbody> </table>	Edit	Can change properties of the object.	Edit Advanced	Can change advanced properties of the object, which generally means anything involving bill, pay and other monetary rates and amounts.	Create	Can create new objects of this type.	Delete	Can delete objects of this type.	Import	Can import objects of this type.	Export	Can export objects of this type.	Customize	Can manage custom fields for objects of this type.
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Delete	Can delete objects of this type.														
Import	Can import objects of this type.														
Export	Can export objects of this type.														
Customize	Can manage custom fields for objects of this type.														
Approve	Determines whether an employee with this permission level can approve all or a limited subset of the objects. If set to limited then the employee must be assigned to the individual objects you wish them to approve.														

Can view my timesheet	<p>If not checked, the "My Timesheet" tab will not be shown, even if the employee has a timesheet template in their employee profile. This permission is useful for simplifying the user interface for employees who meet all of the following criteria:</p> <ol style="list-style-type: none"> 1. They are not recording work hours 2. They are not required to submit their timesheet 3. They are only using the Leave Request feature on the Home tab to record leave 4. Their employee policy's Schedule Rules is configured to add leave requests to their timesheet
Can undo submit of my timesheet	<p>This applies to timesheet objects only, and determines whether an employee can unsubmit (unlock) their timesheet. Note that once a timesheet has been approved the employee will not be able to unsubmit it, regardless of this permission.</p>
Can edit my punches	<p>This applies to timesheets only, and determines whether an employee can edit work time entries on their timesheet. If this permission is not enabled then:</p> <ul style="list-style-type: none"> • Employees will not be able to edit the start, finish or hours fields of their work rows manually. • Employees will not be able to delete work rows from their timesheets. • Employees will not be able to delete their timesheet. <p>Employees will still be able to change the project or pay code, enter notes, etc. of work rows. Also, this permission does not affect leave rows - employees will be able to add leave rows to their timesheet.</p>
Can copy my previous timesheet hours	<p>This permission determines whether employees can have timesheet memory carry forward hours from the previous timesheet (this is set from the Home > Preferences page). This permission also determines whether the employee sees a "Copy Previous Timesheet" option on their timesheet. If this permission is off then the employee can only carry forward or copy rows from the previous timesheet.</p> <p>Note that if you turn this permission off, but an employee has already set their timesheet memory to carry forward rows and hours, you will need to also change their timesheet memory setting from Employees page.</p>
Can punch from time clock device only	<p>Turning this permission on will allow an employee to only punch in/out from a time clock device, ensuring their physical presence. The employee will not be able to punch in/out from a web browser. The employee will still be able to add leave to their timesheet using a web browser, however.</p>

Permission Lists

A permission lists is a set of users and groups given special permissions to access an object. This is useful in larger organizations where you want to distribute some of the application management tasks to multiple employees. Another use is to limit which objects, such as projects, tasks or paycodes, that an employee can view and add to their timesheets.

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Notices

Notices

Notices are emails that can be sent to employees for various events that occur in the application.

Note: You must configure the SMTP settings before being able to send email notices. The [System Settings](#) topic has more information.

The following notices can be sent:

Employee Late Notice

The Employee Late notice is sent to an employee's primary approver if the employee punches in after their scheduled start time (see the [Managing Employees](#) topic for more information about the scheduled start time). For this notice to be sent make sure the employee's "Scheduled Start" and "Approver" properties are specified, and that their approver has a valid email address in approver's employee profile.

Timesheet Due Notice

The Timesheet Due notice is sent to employees who have not submitted their timesheet by a certain date. The date is relative to the end of the timesheet period, either before or after it. By default, this notice is not sent to employees using leave-only timesheets, but you can override this setting.

Timesheet Late Notice

Like the Timesheet Due Notice, the Timesheet Late notice is sent to employees who have not submitted their timesheet by a certain date. The date is relative to the end of the timesheet period, either before or after it. By default, this notice is not sent to employees using leave-only timesheets, but you can override this setting. You can optionally CC the employee's approver(s) using the CC property.

Timesheet Rejected Notice

The Timesheet Rejected notice is sent to employees immediately upon their timesheet being rejected.

Timesheet Submitted Notice

The Timesheet Submitted notice is sent to the employee's primary approver immediately upon submission of their timesheet.

Timesheet Approval Due Notice

The Timesheet Approval Due notice is sent to primary approvers who have timesheets waiting their approval. This is sent at a date relative to the end of the timesheet period, either before or after it. You can optionally CC the employee's backup approver(s) using the CC property.

Timesheet Approval Late Notice

Like the Timesheet Approval Due notice, the Timesheet Approval Late notice is sent to primary approvers who have timesheets waiting their approval. This is sent at a date relative to the end of the timesheet period, either before or after it. You can optionally CC the employee's backup approver(s) using the CC property.

Request Approved Notice

The Request Approved notice is sent to request owners immediately upon their leave request being approved.

Request Rejected Notice

The Request Rejected notice is sent to request owners immediately upon their leave request being rejected.

Request Submitted Notice

The Request Submitted notice is sent to the employee's primary approver immediately upon submission of a leave request.

Request Approval Due Notice

The Request Approval Due notice is sent to primary approvers who have leave requests waiting their approval. This is sent at a date relative to either the date of submission or the start date of the requested leave. You can optionally CC the employee's backup approver(s) using the CC property.

Request Approval Late Notice

Like the Request Approval Due notice, the Request Approval Late notice is sent to primary approvers who have leave requests waiting their approval. This is sent at a date relative to either the date of submission or the start date of the requested leave.

You can optionally CC the employee's backup approver(s) using the CC property.

The Request Approval Due notice can optionally keep resending the notice if warranted. Checking this option will cause the notice to be resent each day (for up to 14 days) until any requests that are late for approval have been approved or rejected.

Crew Timesheet Rejected Notice

The Crew Timesheet Rejected notice is sent to managers if the crew timesheet they submitted is later rejected. This notice is only available if the Crew Timesheet option is enabled (from the System > Timesheet Options page).

Editing Notices

Administrators can edit the subject and body of the notices. The subject is plain text, but the body can be either plain text or HTML. The body text can be up to 4000 characters. Both the title and body can contain the following substitution variables:

Substitution Variables	
Variable	Description
<code>\${System.applicationName}</code>	Application Name, as specified in the Branding page.
<code>\${System.companyName}</code>	Company Name, as specified in the Branding page.
<code>\${System.url}</code>	Address of login page. This value is based on the Application URL system property, which can be modified on the System Settings page.
<code>\${System.currentDate}</code>	Current date
<code>\${System.currentDateTime}</code>	Current date and time

<code>\${System.currentTime}</code>	Current time
<code>\${TimeSheet.approve.url}</code>	Address of the timesheet approval page. This value is based on the Application URL system property, which can be modified on the System Settings page.
<code>\${TimeSheet.period}</code>	Timesheet period
<code>\${TimeSheet.rejectMessage}</code>	The timesheet rejection reason. This is only valid for the Timesheet Rejected notice.
<code>\${TimeSheet.url}</code>	Address of 'My Timesheet' page. This value is based on the Application URL system property, which can be modified on the System Settings page.
<code>\${TimeSheet.user.fullName}</code>	Timesheet owner's full name.
<code>\${User.fullName}</code>	Employee full name, which is the first name followed by the last name.
<code>\${User.list}</code>	A list of employees. The list will depend on the type of notice. For instance, in the Timesheet Approver Due and Timesheet Approver Late notices this value will resolve to the list of employees with timesheets that need approving.
<code>\${User.login}</code>	Employee login name
<code>\${Request.approve.url}</code>	Address of the request approval page. This value is based on the Application URL system property, which can be modified on the System Settings page.
<code>\${Request.user.fullName}</code>	Request owner's full name. This is valid only for Request notices.
<code>\${Request.type}</code>	Request type, for example "Vacation". This is valid only for Request notices.
<code>\${Request.date}</code>	Request date range. This is valid only for Request notices.
<code>\${Request.description}</code>	Request description, as entered by the employee. This is valid only for Request notices.
<code>\${Request.finish}</code>	Request finish date and time (if specified). This is valid only for Request notices.
<code>\${Request.rejectMessage}</code>	Request rejection message, in any. This is valid only for Request notices.
<code>\${Crew.name}</code>	The name of the crew or group.
<code>\${Crew.url}</code>	The address of the Crew Timesheet page. This value is based on the Application URL system property, which can be modified on the System Settings page.

Devices

Pacific Timesheet supports time and attendance tracking using hardware access devices, such as models provided by ACTAtek (www.actatek.com).

The following devices are supported:

Manufacturer	Model
ACTAtek www.actatek.com	<ul style="list-style-type: none"> • PIN • Smart Card • Fingerprint • Combination
ZK Software usa.zksoftware.com	<ul style="list-style-type: none"> • PIN • Smart Card • Fingerprint • Facial • RFID

Devices have the following properties:

Property	Description
Name	The device name, up to 80 characters. A value is required and must be unique.
Description	A description of the device, up to 255 characters.
Enabled	This determines whether the device will be periodically (every 5 minutes or so) synchronized. Synchronization is where device attendance information is converted to employee timesheets.
Work Codes Are	For clocks that support entering work codes, this allows you configure how work codes are mapped to Pacific Timesheet objects. For instance, you might want work codes to map to tasks.
IP Address	The TCP/IP address of the device.
Secure Connection	This option determines whether a secure or encrypted connection is used when the Pacific Timesheet software synchronizes with the device. For ACTAtek devices this means SSL.
Login ID	The administrator login ID for the device. For ACTAtek devices this is case-sensitive.
Password	The administrator login password. This is always case-sensitive.
Last Synchronization	The date and time Pacific Timesheet last successfully synchronized with the device.

Adding Devices

There are two types of time clocks that Pacific Timesheet supports: 1) poll devices and 2) push devices. For poll devices (such as ACTAtek) Pacific Timesheet must periodically request attendance information by communicating with the time clock. In order to do this it must

know the IP address of the time clock. Push devices (such as ZK Software) work in an opposite manner and send attendance data to Pacific Timesheet whenever someone accesses the device. This requires configuring the device with the address of the Pacific Timesheet server.

Push Devices (ZK Software, etc.)

1. The first step will be to install your time clock device and configure it with the address of your Pacific Timesheet service. Once you have done this and have the time clock running, it will automatically register itself with the Pacific Timesheet software.
2. Go to the System > Devices page and you should see an entry for the new clock. For security reasons, the device will be disabled, and you must enable it before it will start receiving attendance data from the device.

Poll Devices (ACTAtek, etc.)

1. The first step will be to install your time clock device and configure its IP address. If you are using ACTAtek devices the [ACTAtek Devices](#) topic has more information.
2. Go to the System > Devices page and click the Add button. Fill in the name, address and other settings as appropriate for the device. You can test the connection by clicking the "Test Connection" button. When finished click the OK button.
3. If Pacific Timesheet can communicate successfully with the device you will see a status of "Ready". If you see otherwise you will generally find the problem to be a network connection issue (wrong IP address, no network connection, etc.). The first step to troubleshoot the problem is to issue a "ping" command from a console on the machine running the Pacific Timesheet software, for example "ping 192.168.0.100".

Synchronization

For poll devices (such as ACTAtek) Pacific Timesheet will read the attendance information from each enabled device, usually about every 5 minutes. For push devices (such as ZK Software) attendance information is sent to Pacific Timesheet as they happen. In order for proper synchronization to work it is necessary for the employee's login ID or PIN for the device match one of the following 3 employee properties in Pacific Timesheet :

1. The employee login name.
2. The employee ID.
3. The "Time Clock ID" custom employee field. If the login ID used for the time clock is not appropriate for either the employee login or employee ID in Pacific Timesheet, then you can create a custom text field named "Time Clock ID" (via the Employees tab > Manage Custom Fields option). If this field is present then the device synchronization will try to match against this field to find the appropriate Pacific Timesheet employee.

Some devices can record a group ID with each attendance record. Each group ID should have a corresponding group in Pacific Timesheet with the same name or ID for proper synchronization.

Some devices can record a work code or ID with each attendance record. Each work code or ID should have a corresponding object in Pacific Timesheet with the same name or ID for proper synchronization. You specify which type of Pacific Timesheet object maps to work codes via the "Work Codes Are" device property, described above.

Note: You can check for synchronization errors by viewing the synchronization log for each device. From the System > Devices page click the name link to see the details of the device. At the bottom of the page is the most recent synchronization messages.

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ACTatek Devices

First Time Setup

Follow these steps to set up your ACTatek device for the first time. If using multiple time clocks please see the note at the end of this topic:

1. Connect the power and network cable to the device. The installation instructions that came with the package cover this in detail.
2. Configure the IP address of the device. You will want to use a fixed (static) IP address. Press the menu button on the device, which is the second button down from the top-right corner of the keypad. You will be prompted to log in - use the following values:

Login ID	A999
Login Password	1

Press the arrow buttons on the bottom row of the keypad to move the selection to the "IP Setting" menu, then press the enter button (the lower-right-most button on the keypad). Then change the following values:

Subnet Mask	The subnet mask, for example 255.255.255.0
DHCP	Turn this off since we are using a fixed IP address
IP Address	The TCP/IP address of this device, for example 192.168.0.100
Gateway	The default gateway, for example 192.168.0.1

The network protocol used by the ACTatek device is HTTP/HTTPS, so you may need to make sure that those ports are allowed if any firewalls are between the device and the Pacific Timesheet software.

The remaining setup steps will be performed from the device's web-based administration interface.

3. Using a browser, enter the administration web page address for this device:

<http://192.168.0.100>

Replace the IP address above with the value appropriate for yours. Log in as the Super Admin with the following values:

Login ID	A999
Login Password	1
Login Level	Super Administrator

Note that the login ID and password is case-sensitive (whereas for Pacific Timesheet only the password is case-sensitive).

4. Click the Terminal Clock link on the navigation panel on the left side of the page. Set the following values as appropriate:

Date	The current date
------	------------------

Time	The current time
Time Zone	The appropriate time zone for this device

Note: You have the option to use SNTP (Simple Network Time Protocol) to automatically adjust the device's clock. This is not needed, however, as Pacific Timesheet will automatically keep the device clock synchronized.

5. By default the ACTAtek device will record every access as an IN punch. This is useful if you are using multiple devices and your employees may punch in on one device but out on another. If you require your employees to punch in and out on the same device you should set the device to record both IN and OUT punches. To do this click the "Terminal Setup" link on the left side of the page, then enable the "Auto IN/OUT" setting.

Adding Employees

Employees (also called Users by the ACTAtek device) are generally best added at the device, a necessity if using fingerprints. To add a new user to the device follow these steps:

1. Press the menu button on the device, which is the second button down from the top-right corner of the keypad. You will be prompted to log in - use the following values:

Login ID	A999
Login Password	1

2. Choose the "Add User" menu and press the enter button (the lower-right-most button on the keypad). Your options will include, depending upon the model, either fingerprint, smart card or password. Choose the desired authentication method and press the enter key. You will be asked for a user ID, which can be up to 20 characters (digits plus the letter A, B or C). Enter the desired user ID and then follow the instructions for recording fingerprints, smart card information or a password.

3. Using a browser, log into Pacific Timesheet and create an employee to match the one just created on the device. Make sure either the employee's Login Name, Employee ID or Time Clock ID field matches the user ID entered on the device. The Time Clock ID field is an optional custom field to use when you cannot use the login name or employee ID fields. To create this, go to the Employees > Manage Custom Fields page and add a new text field named "Time Clock ID".

Note: It is important that the Pacific Timesheet employee Login Name, Employee ID or Time Clock ID field match the user ID on the device, otherwise the employee's timesheet will not synchronize with the device.

Note: If you replace an old or defective device with a new one, you should also delete the device entry from the list and re-add it. Otherwise you may find the system will not synchronize with the new device.

Note: Using Multiple Time Clocks

When implementing multiple ACTAtek time clocks you have two major configuration options:

1. Stand Alone Configuration (Default)

In this configuration each time clock acts as a stand-alone device. In this configuration, each clock must be individually configured, with users enrolled at each device. Each device

must be added to Pacific Timesheet for synchronization.

2. Primary/Secondary Configuration

In this configuration you define one of your time clocks as the primary device. Then every other device is defined as a secondary and configured to synchronize with the primary device. In this configuration you only need to configure and enroll users at the primary device. Only the primary device must be added to Pacific Timesheet for synchronization.

Note: Do not add secondary devices to Pacific Timesheet for synchronization or you will get duplicate timesheet data.

See the Primary/Secondary option under 'Terminal Settings' in the ACTAtek web administrative interface for more details.

Note: Resetting the Super Admin (A999) Password

For security reasons, there is no way to manually reset the device back to its factory settings or otherwise reset the Super Admin (A999) password. If you have forgotten your Super Admin password please do the following:

1. Email the serial number and IP address of the unit to support@actatek.com, letting them know you want to reset the Super Admin password. To get the serial number and IP address press the Enter button on the ACTAtek unit six times and it will display the information.
2. You will be emailed a link to a password recovery patch, which will, for security, expire after 48 hours. Download this patch to your local computer.
3. Open a browser on your local computer and go to the recovery page of the ACTAtek unit, as described in the email response from ACTAtek. For instance:

<http://192.168.1.88/cgi-bin/recovery.cgi>

4. Upload the recovery patch as per the instructions on this page. Once the upload is completed you will be able to log in as the Super Admin: A999 with password 1.

Schema

A schema is a set of database tables, and is used by the application to store timesheet data and settings. If you are hosting the application yourself you can review your schema settings, as well as edit or create a new schema. Normally you would use the schema created by the installer and never change these settings. But if you would like to use an external database like Microsoft SQL Server or Oracle, or if you installed the WAR version of the application, you will need to create a new schema before you can use the system.

Note: For security reasons you may only access the Schema page if you are on the computer running the timesheet service.

For a list of supported databases and versions refer to the [System Requirements](#) topic. The installer provides the following database:

Bundled Database	
MySQL 5.0.22	Default TCP/IP Port: 3316 Administrative Login: See the "Bundled Software" section in timesheet-install.pdf

The Schema page is located at the following address:

<http://localhost/timesheet/system/db-show.do>

If you changed the default HTTP port from 80 then you will need to specify the port number, too, for example:

<http://localhost:8080/timesheet/system/db-show.do>

This will load a page showing the current schema configuration. You can edit this schema configuration by clicking the Edit button, or create a new schema by clicking the Create button. Note that for security reasons you need to be using a browser on the same machine that the application is installed on.

Editing the schema configuration will not alter the schema, just the settings that the application uses to connect to the schema. Creating a new schema will not delete or alter the old schema, but will create a new schema and update the settings so that the application will use the new one.

Schema Properties

Database Type

The type of database management system (DBMS) to be used. The following types are supported:

Server Address

The TCP/IP address or host name of the database server. Use *localhost* if the database server is running on the same computer as the application.

Server Port

The TCP/IP port number used by the database server. The value will default to the number appropriate for the database type, which is generally the value you want to use.

Schema Name/Oracle SID

For Microsoft and MySQL the schema name is the name of the database. For Oracle you would use the SID (Server IDentifier).

Login Name

The login name for the database account to use when connecting to the database server.

Password

The password for the login.

When creating a new schema you have the following additional properties:

Admin Login

The login name for the administrative account for the database server. Note that if creating a new schema or database using the bundled MySQL database, the default administrative login is *root* with the password is *timesheet*.

Admin Password

The password for the administrative account. Note that if creating a new schema or database using the bundled MySQL database, the default administrative login is *root* with the password is *timesheet*.

New Schema Name

For Microsoft and MySQL this is the name of the new database to create. For Oracle this is the name of the new tablespace to create.

New Login

The login name for the new database account to use when connecting to the database server.

New Password

The password for the new login.

SQL Server 2005 Note: SQL Server 2005 has stricter login and password rules than SQL Server 2000 by default. Make sure the password for the new database schema doesn't match the new schema name, as this will often cause an error. You can see details for the error message in the log files, located in the tomcat/logs directory of the installation directory.

Custom Fields

You can customize many objects in the application by adding new data fields. Customfields allows you to store additional information with an object, such as a text string, a date, a file attachment or any other value as needed for your business-specific requirements. You can manage custom fields for objects from the "Manage Custom Fields" link on the options menu on the page that lists the objects. For instance, to manage Employee custom fields you go to the Employees page, click the options menu (the small triangle to the top-right of the employee list) and choose "Manage Custom Fields". If you do not see this you may not have management permissions for this type of object - check your Permission Level in your employee profile to verify that you have the appropriate permissions.

Once created, custom field values can be set through the web interface for each object, or imported/exported. You can create reports that include the custom fields as well.

Note: If you create a report with a custom field, then later delete the custom field, the report will generate an error when run. This is because the database column is now missing. To correct this simply edit the report and remove the obsolete report column in order for the report to run correctly again.

Custom fields have the following properties:

General Properties

Field Name

The name of the custom field. This is the name that will appear on the properties form, as well as in import/export files. This field is required and can be up to 80 characters.

Type

The type of custom field, which can be one of the following:

Type	Description
Checkbox	A field representing a true/false choice.
Currency	A number representing a currency amount.
Date	A date value.
Date and Time	A date and time value.
Email Address	A text field for entering and displaying an email address.
Employee	An employee selection.
File Attachment	Allows uploading and downloading of a file. Maximum size is limited to 250MB.
Image	Allows uploading and displaying of an image. Maximum size is limited to 250MB.
List	A text field allowing the selection of one or more choices from a list of choices.
Number	A numeric value, allowing an arbitrary number of decimal places of precision.
Text	A text value.
Text Area	A text value that allows line breaks.

Time	A time of day value.
Web Link	A text field for entering and displaying a web address.

You can only specify the type when adding a new custom field. If you need to change the type of an existing custom field you need to delete the existing one and create a new one.

Position

The position determines where on the form the field will appear.

Start New Field Group

Checking this option will cause a horizontal line to appear immediately before this field. This is useful when grouping several related fields.

Description

A description of this field. This should be as brief as possible, but can be up to 255 characters.

Required

Checking this option will require a value for this field.

Default Value

Specifies the default value for the custom field.

Timesheet custom fields that are text (e.g. Text, Text Area, List, etc.) also allow you to default the value to an employee property by using the `#{User.xyz}` variable, where User refers to the employee object and xyz is the name of the employee property. For example `#{User.lastName}` would default the value to the employee's last name. If you had an employee custom field named "Pay Class" then you would use `#{User.xPayClass}`.

Checkbox Properties

Checkbox Text

Text or label that appears to the right of the checkbox. This should be as terse as possible, but can be up to 80 characters.

Currency Properties

Currency

The currency symbol.

Decimal Digits

The number of digits to display after the decimal point. This can be zero if displaying an integer value.

Minimum Value

The minimum value this field can have. Leave this blank if there is no minimum value.

Maximum Value

The maximum value this field can have. Leave this blank if there is no maximum value.

Image

Width

Specify this value if you want to scale the image to this width, in pixels.

Height

Specify this value if you want to scale the image to this height, in pixels.

List

List Style

The style of the list control, which can be either a drop-down menu or a list box.

List Box Height

The height of the list box, in rows.

Multiple Selection

Checking this option allows multiple selections. Note that multiple selections are stored in same field just like single selections, but with each selection being separated by a line break character.

List Choices

Enter your list choices here, with each choice starting on a new line.

Number

Decimal Digits

The number of digits to display after the decimal point. This can be zero if displaying an integer value.

Minimum Value

The minimum value this field can have. Leave this blank if there is no minimum value.

Maximum Value

The maximum value this field can have. Leave this blank if there is no maximum value.

Text

Maximum Characters

The maximum number of characters that can be entered in this field. This can be up to 255 characters.

Text Area

Maximum Characters

The maximum number of characters that can be entered in this field. This can be up to 4000 characters.

Rows

The height of the text area, in rows.

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Importing/Exporting

You can import and export objects such as employees, groups and tasks in [CSV](#) (Comma Separated Value) format. Note that your ability to import or export will depend upon your permission level: administrators can import and export any object but other permission levels may have the ability to import or export disabled.

CSV Formatting Notes

In order to make data interchange as reliable as possible, the following formatting rules are followed:

- By default, **dates**, **times** and **numbers** are formatted for the locale of the user doing the import/export. You can override the date and time formatting for each export from the System > General > Data Integration page.
- **Unicode (UTF8)** character encoding is used in order to fully support international languages. Make sure you save your CSV files in UTF8 format in order to not lose accented characters, etc. Exported CSV data is always generated in UTF8 format.
- Field values with **commas** or **carriage returns** are 'escaped' by enclosing the value in **double-quotes**.
- Fields with **multiple values** have each value separated by a **carriage return** (also called a "hard" carriage return in Excel, entered using ALT+ENTER). Alternatively, when importing data you can optionally specify a **semicolon ";"** character instead, if you prefer.

In addition:

- All fields are optional unless otherwise noted.
- The behavior of blank values depends on the field.
- A header record at the start of the file is required.

Match Field

When importing some types of objects you can specify a match field, which is used to avoid creating duplicates. The match field determine which property is used to match against existing objects to avoid duplicates. For instance, when importing employees you generally you would use the Login Name, but the Employee ID and Email are also options.

Objects

The following objects can be imported and exported in CSV format - click the links for a detailed description of the CSV fields:

- [Assets](#)
- [Asset Classes](#)
- [Asset Entries](#)
- [Bill Rates](#)
- [Customers](#)
- [Employees](#)
- [Employee Balances](#)
- [Groups](#)
- [Pay Rates](#)
- [Projects](#)

- [Project Groups](#)
- [Tasks](#)
- [Task Groups](#)
- [Timesheets](#)

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Asset Fields

Field	Description	Format								
Name	Asset name. When adding a new asset this field is required. This value must be unique for all assets, regardless of the asset type.	Text (80 chars max)								
ID	Asset ID. This field is not required, but if present and the value is not blank then it must be unique for all assets, regardless of the asset type.	Text (80 chars max)								
Description	A description of this asset.	Text (255 chars max)								
Status	Asset status. Possible value are: <table border="1"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>The asset is active and available for use.</td> </tr> <tr> <td>Inactive</td> <td>The asset is not available for use, but can still be optionally reported on.</td> </tr> </tbody> </table>	Value	Description	Active	The asset is active and available for use.	Inactive	The asset is not available for use, but can still be optionally reported on.	Text		
Value	Description									
Active	The asset is active and available for use.									
Inactive	The asset is not available for use, but can still be optionally reported on.									
Type	The asset type (name or ID). The asset type of the asset class will be used if this is not specified. If no asset class specified then this is required when adding a new asset and there are more than one asset types defined.	Text								
Class	The asset class (name or ID). This is optional, but if not specified and you are creating a new asset you must then specify the Type field.	Text								
Units	The unit of measurement (name or ID).	Text								
Unit Cost	The cost per unit of measure for this asset. The cost is the amount you paid for this asset.	Number								
Unit Price	The price per unit of measure for this asset. The price is the amount you charge for this asset.	Number								
Unit Markup	The markup or margin percentage. Only applicable if the Unit Price Flag is set to Markup or Margin.	Number								
Unit Price Flag	If you are not specifying a fixed Unit Price you can have the system compute it. Possible values are: <table border="1"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Fixed Price</td> <td>The Unit Price is as entered.</td> </tr> <tr> <td>Markup</td> <td>The Unit Price is computed as a percent markup of the Unit Cost.</td> </tr> <tr> <td>Margin</td> <td>The Unit Price is computed as a percent margin of the Unit Cost.</td> </tr> </tbody> </table>	Value	Description	Fixed Price	The Unit Price is as entered.	Markup	The Unit Price is computed as a percent markup of the Unit Cost.	Margin	The Unit Price is computed as a percent margin of the Unit Cost.	Text
Value	Description									
Fixed Price	The Unit Price is as entered.									
Markup	The Unit Price is computed as a percent markup of the Unit Cost.									
Margin	The Unit Price is computed as a percent margin of the Unit Cost.									
Decimal Digits	The number of decimal digits to allow when entering quantities of this asset. If not specified then the default value of the Units will be used.	Number								

<p>Permissions</p>	<p>The list of employees and groups given special permission on this object. Multiple permissions have each value separated by a carriage return (also called a "hard" carriage return in Excel, entered using ALT+ENTER). Each value is of the form:</p> <p>Object Name=Permission Level (Object Type)</p> <p>Where Object Name is the name of the group or the login of the employee, Permission Level is the permission level to give the employee or group on this object, and Object Type is the whether this is an Employee or Group that is being given permission. Here is an example of a group and an employee assigned to an object:</p> <p>GroupA=Timekeeper (Group) jmeysers=Manager (Employee)</p> <p>Note that the permission level and object type are optional. If the permission level is not specified then it will be set to the employee's default permission level. If the object type is not specified the system will first check for a group with a matching name, then look for an employee with a matching login name. Only if you have group names and employee logins that might be the same do you need to specify the object type.</p>	<p>Text</p>
<p>Notes</p>	<p>Notes about this asset.</p>	<p>Text (2000 chars max)</p>

Asset Class Fields

Field	Description	Format						
Name	Asset class name. When adding a new asset this field is required. This value must be unique for all asset classes, regardless of the asset type.	Text (80 chars max)						
ID	Asset class ID. This field is not required, but if present and the value is not blank then it must be unique for all asset classes, regardless of the asset type.	Text (80 chars max)						
Description	A description of this asset class.	Text (255 chars max)						
Status	Asset class status. Possible value are: <table border="1" data-bbox="300 674 1158 824"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>The asset class is active and available for use.</td> </tr> <tr> <td>Inactive</td> <td>The asset class is not available for use, but can still be optionally reported on.</td> </tr> </tbody> </table>	Value	Description	Active	The asset class is active and available for use.	Inactive	The asset class is not available for use, but can still be optionally reported on.	Text
Value	Description							
Active	The asset class is active and available for use.							
Inactive	The asset class is not available for use, but can still be optionally reported on.							
Type	The asset type (name or ID) for this asset class. If there are multiple asset types defined then this field is required.	Text						

Asset Entry Fields

Field	Description	Format
Date	The date this asset was used.	Date
ID	The asset entry ID. This field is not required, but if present and the value is not blank then it must be unique for all asset entries, regardless of the asset type. Note that the system will automatically generate this value when adding new entries if a value is not provided. If a value is present when importing then any existing entry with a matching ID will be updated, rather than a new entry being added.	Text (80 chars max)
Description	A description for this asset entry.	Text (255 chars max)
Asset	The asset (name or ID) used for this entry. If specified then the asset's class and units will be assumed for this entry.	Text
Type	The asset type (name or ID) for this entry. The asset type of the asset will be used if this is not specified. If no asset specified then this is required when adding a new asset entry and there are more than one asset types defined.	Text
Class	The asset class (name or ID) for this entry. This is optional and will be set to the value for the Asset if not specified.	Text
Units	The unit of measurement (name or ID) for this entry. This is optional and will be set to the value for the Asset if not specified.	Text
Quantity	The number or quantity of units used for this entry.	Number
Unit Cost	The cost per unit of measure for this asset entry. The cost is the amount you paid for this asset. This is optional and will be set to the value for the Asset if not specified.	Number
Total Cost	The total cost for this asset entry. This is optional and if not specified will be computed as Quantity x Unit Cost.	Number
Unit Price	The price per unit of measure for this asset. The price is the amount you charge for this asset. This is optional and will be set to the value for the Asset if not specified.	Number
Total Price	The total price for this asset entry. This is optional and if not specified will be computed as Quantity x Unit Price.	Number
Employee	The employee (name or ID) this asset entry is to be associated with. If not specified then this will default to the employee doing the import when creating new entries.	Text

Reporting Group	The reporting group (name or ID) this asset entry is to be associated with. If not specified then this will default to the reporting group of the employee doing the import when creating new entries.	Text
Customer	The customer (name or ID) this asset entry is to be associated with.	Text
Project Group	The project group (name or ID) this asset entry is to be associated with.	Text
Project	The project (name or ID) this asset entry is to be associated with.	Text
Task Group	The task group (name or ID) this asset entry is to be associated with.	Text
Task	The task (name or ID) this asset entry is to be associated with.	Text
Submitted	A value of either Yes or No depending upon whether this asset entry has been submitted (locked).	Text
Submit Date	If the entry is submitted then this will be the date and time of the submit.	Date
Submitted By	The employee (name or ID) who submitted the entry.	Text
Approved	A value of either Yes or No depending upon whether this asset entry has been approved.	Text
Approval Date	If the entry is approved then this will be the date and time of the approval.	Date
Approved By	The employee (name or ID) who approved the entry.	Text
Export Date	If this entry has been marked as exported then this will be the date and time of the export. You can use this field to 'unmark' entries that have been inadvertently marked as exported by specifying a value of 1/1/1970.	Date
Exported By	The employee (name or ID) who marked the entry as exported.	Text
Notes	Notes about this asset entry.	Text (2000 chars max)

Bill Rates Fields

Field	Description	Format
Object	The name of primary object that rates depend on, for example "Employee". This is optional if the Object ID field is supplied.	Text (80 chars max)
Object ID	The ID of the primary object the rates depend on, for example "222-99-5555". This is optional if the Object field is supplied.	Text (80 chars max)
Subobject	The name of exception object that rates depend on, for example "Group". This is optional if the Subobject ID field is supplied. The subobject or subobject ID is optional if you are setting the default rate for the object.	Text (80 chars max)
Subobject ID	The ID of the exception object the rates depend on, for example "Accounting Group". This is optional if the Subobject field is supplied. The subobject or subobject ID is optional if you are setting the default rate for the object.	Text (80 chars max)
Bill Rate	The rate for this object/subobject. The rate can be either a numeric value, or the name of a rate as defined in the System > Bill Rate Options page.	Number/Text

Customer Fields

Field	Description	Format						
Name	Customer name. If this field is present in the CSV data then a value is required, and is always required when adding new customers.	Text (80 chars max)						
ID	Customer ID. This field is not required, but if present and the value is not blank then it must be unique for all customers.	Text (80 chars max)						
Description	A description of this customer.	Text (255 chars max)						
Status	Customer status. Possible value are: <table border="1" data-bbox="300 645 1157 795"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>Employee can log into system.</td> </tr> <tr> <td>Inactive</td> <td>Employee cannot log into system, and does not show up on reports, etc. by default.</td> </tr> </tbody> </table>	Value	Description	Active	Employee can log into system.	Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.	Text
Value	Description							
Active	Employee can log into system.							
Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.							
Permissions	The list of employees and groups given special permission on this object. Multiple permissions have each value separated by a carriage return (also called a "hard" carriage return in Excel, entered using ALT+ENTER). Each value is of the form: Object Name=Permission Level (Object Type) Where Object Name is the name of the group or the login of the employee, Permission Level is the permission level to give the employee or group on this object, and Object Type is the whether this is an Employee or Group that is being given permission. Here is an example of a group and an employee assigned to an object: GroupA=Timekeeper (Group) jmeyers=Manager (Employee) Note that the permission level and object type are optional. If the permission level is not specified then it will be set to the employee's default permission level. If the object type is not specified the system will first check for a group with a matching name, then look for an employee with a matching login name. Only if you have group names and employee logins that might be the same do you need to specify the object type.	Text						
Notes	Notes about this customer.	Text (2000 chars max)						

Employee Fields

Field	Description	Format								
Login Name	Employee login name. If this field is present in the CSV data then a value is required, and is always required when adding new employees.	Text (80 chars max)								
Password	Employee password. This field is not exported but can be imported. Updating an employee's password through an import creates an expired password - the employee will be asked to enter a new one the next time they log in.	Text (40 chars max)								
First Name	First name.	Text (80 chars max)								
Last Name	Last name. If this field is present in the CSV data then a value is required, and is always required when adding new employees.	Text (80 chars max)								
ID	Employee ID. This field is not required, but if present and the value is not blank then it must be unique for all employees.	Text (80 chars max)								
Status	Employee status. Possible value are: <table border="1" data-bbox="400 943 1262 1200"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>Employee can log into system.</td> </tr> <tr> <td>Inactive</td> <td>Employee cannot log into system, and does not show up on reports, etc. by default.</td> </tr> <tr> <td>Locked</td> <td>Employee cannot log into system, but shows up on reports, etc. by default. An employee can become locked due to too many unsuccessful login attempts.</td> </tr> </tbody> </table>	Value	Description	Active	Employee can log into system.	Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.	Locked	Employee cannot log into system, but shows up on reports, etc. by default. An employee can become locked due to too many unsuccessful login attempts.	Text
Value	Description									
Active	Employee can log into system.									
Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.									
Locked	Employee cannot log into system, but shows up on reports, etc. by default. An employee can become locked due to too many unsuccessful login attempts.									
Permission Level	The default permission level, for example Employee.	Text								
Employee Type	The type of employee.	Text								
Policy	The policy for this employee.	Text								
Job Title	Job title.	Text (80 chars max)								
Reporting Group	The name of the primary or reporting group.	Text								
First Day	The first day of employment.	Date								
Last Day	The last day of employment.	Date								
Scheduled Work Days	The scheduled days of the week that are considered work. This is formatted as a list of names of the days of the week separated by spaces, for example "Mon Tue Wed Thu Fri". The name of the day can be the standard abbreviation or the full name, as appropriate for the language of the locale of the user doing the import.	Text								
Scheduled Hours	The number of hours the employee is scheduled to work each week.	Number								
Scheduled Start	The time of day the employee is scheduled to start work or "punch in".	Time								

Scheduled Finish	The time of day the employee is scheduled to finish work or "punch out".	Time								
Email	Email address.	Text (80 chars max)								
Phone	Phone number.	Text (40 chars max)								
Mobile	Mobile phone number.	Text (40 chars max)								
Fax	Fax number.	Text (40 chars max)								
Timesheet Template	The timesheet template for this employee.	Text								
Timesheet Memory	<p>This controls whether rows and hours are carried forward from the previous timesheet to new timesheets. Possible values are:</p> <table border="1"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>None</td> <td>None (or a blank value) indicates no rows or hours will be carried forward.</td> </tr> <tr> <td>Rows</td> <td>Timesheet rows will be carried forward from previous timesheet.</td> </tr> <tr> <td>Rows and Hours</td> <td>Timesheet rows and hours will be carried forward from previous timesheet.</td> </tr> </tbody> </table>	Value	Description	None	None (or a blank value) indicates no rows or hours will be carried forward.	Rows	Timesheet rows will be carried forward from previous timesheet.	Rows and Hours	Timesheet rows and hours will be carried forward from previous timesheet.	Text
Value	Description									
None	None (or a blank value) indicates no rows or hours will be carried forward.									
Rows	Timesheet rows will be carried forward from previous timesheet.									
Rows and Hours	Timesheet rows and hours will be carried forward from previous timesheet.									
Punched In	A "Yes"/"No" value indicating whether the employee is punched in or not. This is a read-only value and will be ignored if imported.	Text								
Locale	Locale. The locale determines how dates and numbers are formatted. Locale are specified using ISO codes, and possible values are defined in the Locale Codes appendix.	Text (5 chars max)								
Time Zone	Time zone. Time zones are specified using Olson IDs, and possible values are defined in the Time Zone Codes appendix.	Text (40 chars max)								
Bill Rate	The default bill rate. This can be a named rate, or a custom numeric value.	Text or Number								
Pay Rate	The default pay rate. This can be a named rate, or a custom numeric value.	Text or Number								
Groups	The list of groups this employee is a member of. If a user belongs to multiple groups then each group is separated by a carriage return. If formatting an import file using Excel you can enter multiple lines in a cell using ALT+ENTER (also called a "hard" carriage return).	Text								
Notes	Notes about this employee.	Text (2000 chars max)								
Approver	The name of the primary timesheet approver for the employee. The name can be a login name, employee ID, or full name (either "first last" or "last, first" is accepted).	Text								

Approver Backup	The name of the backup timesheet approver for the employee. The name can be in the form of a login name, employee ID, or full name (either "first last" or "last, first" is accepted).	Text
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Employee Balances Fields

Field	Description	Format
Employee	Employee login name. Either this field or Employee ID must be specified when importing.	Text (80 chars max)
Employee ID	Employee ID. Either this field or Employee must be specified when importing.	Text (80 chars max)
Balance	Balance name. Either this field or Balance ID must be specified when importing.	Text (80 chars max)
Balance ID	Balance ID. Either this field or Balance must be specified when importing.	Text (80 chars max)
Date	When importing this is the date the Value or Change should take effect. When exporting this is the current date.	Date
Value	The value of the balance, in hours. When importing the balance will be set to this value as of the specified Date. This field is ignored when importing if Change is specified. When exporting this is the current balance.	Number
Change	The number of hours to add or deduct from the balance for the specified Date. This field overrides any value in the Value field when importing. This field is only applicable when importing.	Number
Comment	A comment about this change. This field is only applicable when importing.	Text (255 chars max)

Group Fields

Field	Description	Format						
Name	Group name. If this field is present in the CSV data then a value is required, and is always required when adding new groups.	Text (80 chars max)						
ID	Group ID. This field is not required, but if present and the value is not blank then it must be unique for all groups.	Text (80 chars max)						
Description	A description of this group.	Text (255 chars max)						
Status	Group status. Possible value are: <table border="1" data-bbox="300 613 1158 763"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>Employee can log into system.</td> </tr> <tr> <td>Inactive</td> <td>Employee cannot log into system, and does not show up on reports, etc. by default.</td> </tr> </tbody> </table>	Value	Description	Active	Employee can log into system.	Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.	Text
Value	Description							
Active	Employee can log into system.							
Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.							
Employees	The list of employees that are members of this group. Multiple employees have each value separated by a carriage return (also called a "hard" carriage return in Excel, entered using ALT+ENTER). The names can be in the form of a login name, employee ID, or full name (either "first last" or "last, first" is accepted).	Text						
Permissions	The list of employees and groups given special permission on this object. Multiple permissions have each value separated by a carriage return (also called a "hard" carriage return in Excel, entered using ALT+ENTER). Each value is of the form: Object Name=Permission Level (Object Type) Where Object Name is the name of the group or the login of the employee, Permission Level is the permission level to give the employee or group on this object, and Object Type is the whether this is an Employee or Group that is being given permission. Here is an example of a group and an employee assigned to an object: GroupA=Timekeeper (Group) jmeyers=Manager (Employee) Note that the permission level and object type are optional. If the permission level is not specified then it will be set to the employee's default permission level. If the object type is not specified the system will first check for a group with a matching name, then look for an employee with a matching login name. Only if you have group names and employee logins that might be the same do you need to specify the object type.	Text						
Notes	Notes about this group.	Text (2000 chars max)						

Pay Rates Fields

Field	Description	Format
Object	The name of primary object that rates depend on, for example "Employee". This is optional if the Object ID field is supplied.	Text (80 chars max)
Object ID	The ID of the primary object the rates depend on, for example "222-99-5555". This is optional if the Object field is supplied.	Text (80 chars max)
Subobject	The name of exception object that rates depend on, for example "Group". This is optional if the Subobject ID field is supplied. The subobject or subobject ID is optional if you are setting the default rate for the object.	Text (80 chars max)
Subobject ID	The ID of the exception object the rates depend on, for example "Accounting Group". This is optional if the Subobject field is supplied. The subobject or subobject ID is optional if you are setting the default rate for the object.	Text (80 chars max)
Pay Rate	The rate for this object/subobject. The rate can be either a numeric value, or the name of a rate as defined in the System > Pay Rate Options page.	Number/Text

Project Fields

Field	Description	Format						
Name	Project name. If this field is present in the CSV data then a value is required, and is always required when adding new projects.	Text (80 chars max)						
ID	Project ID. This field is not required, but if present and the value is not blank then it must be unique for all projects.	Text (80 chars max)						
Description	A description of this project.	Text (255 chars max)						
Status	Project status. Possible value are: <table border="1" data-bbox="319 616 1177 761"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>Employee can log into system.</td> </tr> <tr> <td>Inactive</td> <td>Employee cannot log into system, and does not show up on reports, etc. by default.</td> </tr> </tbody> </table>	Value	Description	Active	Employee can log into system.	Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.	Text
Value	Description							
Active	Employee can log into system.							
Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.							
Planned Start Date	Planned project start date.	Date						
Planned Finished Date	Planned project finish or end date.	Date						
Planned Estimated Work	Planned number of hours to complete this project.	Number						
Actual Start Date	Actual project start date.	Date						
Actual Finished Date	Actual project finish or end date.	Date						
Permissions	<p>The list of employees and groups given special permission on this object. Multiple permissions have each value separated by a carriage return (also called a "hard" carriage return in Excel, entered using ALT+ENTER). Each value is of the form:</p> <p>Object Name=Permission Level (Object Type)</p> <p>Where Object Name is the name of the group or the login of the employee, Permission Level is the permission level to give the employee or group on this object, and Object Type is the whether this is an Employee or Group that is being given permission. Here is an example of a group and an employee assigned to an object:</p> <p>GroupA=Timekeeper (Group) jmeyers=Manager (Employee)</p> <p>Note that the permission level and object type are optional. If the permission level is not specified then it will be set to the employee's default permission level. If the object type is not specified the system will first check for a group with a matching name, then look for an employee with a matching login name. Only if you have group names and employee logins that might be the same do you need to specify the object type.</p>	Text						

Notes	Notes about this project.	Text (2000 chars max)
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Project Group Fields

Field	Description	Format						
Name	Project Group name. If this field is present in the CSV data then a value is required, and is always required when adding new project groups.	Text (80 chars max)						
ID	Project Group ID. This field is not required, but if present and the value is not blank then it must be unique for all project groups.	Text (80 chars max)						
Description	A description of this project group.	Text (255 chars max)						
Status	Project Group status. Possible value are: <table border="1" data-bbox="300 645 1158 792"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>Employee can log into system.</td> </tr> <tr> <td>Inactive</td> <td>Employee cannot log into system, and does not show up on reports, etc. by default.</td> </tr> </tbody> </table>	Value	Description	Active	Employee can log into system.	Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.	Text
Value	Description							
Active	Employee can log into system.							
Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.							
Permissions	The list of employees and groups given special permission on this object. Multiple permissions have each value separated by a carriage return (also called a "hard" carriage return in Excel, entered using ALT+ENTER). Each value is of the form: Object Name=Permission Level (Object Type) Where Object Name is the name of the group or the login of the employee, Permission Level is the permission level to give the employee or group on this object, and Object Type is the whether this is an Employee or Group that is being given permission. Here is an example of a group and an employee assigned to an object: GroupA=Timekeeper (Group) jmeyers=Manager (Employee) Note that the permission level and object type are optional. If the permission level is not specified then it will be set to the employee's default permission level. If the object type is not specified the system will first check for a group with a matching name, then look for an employee with a matching login name. Only if you have group names and employee logins that might be the same do you need to specify the object type.	Text						
Notes	Notes about this project group.	Text (2000 chars max)						

Task Fields

Field	Description	Format						
Name	Task name. If this field is present in the CSV data then a value is required, and is always required when adding new tasks.	Text (80 chars max)						
ID	Task ID. This field is not required, but if present and the value is not blank then it must be unique for all tasks.	Text (80 chars max)						
Description	A description of this task.	Text (255 chars max)						
Status	Task status. Possible value are: <table border="1" data-bbox="316 611 1177 763"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>Employee can log into system.</td> </tr> <tr> <td>Inactive</td> <td>Employee cannot log into system, and does not show up on reports, etc. by default.</td> </tr> </tbody> </table>	Value	Description	Active	Employee can log into system.	Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.	Text
Value	Description							
Active	Employee can log into system.							
Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.							
Planned Start Date	Planned project start date.	Date						
Planned Finished Date	Planned project finish or end date.	Date						
Planned Estimated Work	Planned number of hours to complete this project.	Number						
Actual Start Date	Actual project start date.	Date						
Actual Finished Date	Actual project finish or end date.	Date						

<p>Permissions</p>	<p>The list of employees and groups given special permission on this object. Multiple permissions have each value separated by a carriage return (also called a "hard" carriage return in Excel, entered using ALT+ENTER). Each value is of the form:</p> <p>Object Name=Permission Level (Object Type)</p> <p>Where Object Name is the name of the group or the login of the employee, Permission Level is the permission level to give the employee or group on this object, and Object Type is the whether this is an Employee or Group that is being given permission. Here is an example of a group and an employee assigned to an object:</p> <p>GroupA=Timekeeper (Group) jmeyers=Manager (Employee)</p> <p>Note that the permission level and object type are optional. If the permission level is not specified then it will be set to the employee's default permission level. If the object type is not specified the system will first check for a group with a matching name, then look for an employee with a matching login name. Only if you have group names and employee logins that might be the same do you need to specify the object type.</p>	<p>Text</p>
<p>Notes</p>	<p>Notes about this task.</p>	<p>Text (2000 chars max)</p>

Task Group Fields

Field	Description	Format						
Name	Task Group name. If this field is present in the CSV data then a value is required, and is always required when adding new task groups.	Text (80 chars max)						
ID	Task Group ID. This field is not required, but if present and the value is not blank then it must be unique for all task groups.	Text (80 chars max)						
Description	A description of this task group.	Text (255 chars max)						
Status	<p>Task Group status. Possible value are:</p> <table border="1"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>Employee can log into system.</td> </tr> <tr> <td>Inactive</td> <td>Employee cannot log into system, and does not show up on reports, etc. by default.</td> </tr> </tbody> </table>	Value	Description	Active	Employee can log into system.	Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.	Text
Value	Description							
Active	Employee can log into system.							
Inactive	Employee cannot log into system, and does not show up on reports, etc. by default.							
Permissions	<p>The list of employees and groups given special permission on this object. Multiple permissions have each value separated by a carriage return (also called a "hard" carriage return in Excel, entered using ALT+ENTER). Each value is of the form:</p> <p>Object Name=Permission Level (Object Type)</p> <p>Where Object Name is the name of the group or the login of the employee, Permission Level is the permission level to give the employee or group on this object, and Object Type is the whether this is an Employee or Group that is being given permission. Here is an example of a group and an employee assigned to an object:</p> <p>GroupA=Timekeeper (Group) jmeyers=Manager (Employee)</p> <p>Note that the permission level and object type are optional. If the permission level is not specified then it will be set to the employee's default permission level. If the object type is not specified the system will first check for a group with a matching name, then look for an employee with a matching login name. Only if you have group names and employee logins that might be the same do you need to specify the object type.</p>	Text						
Notes	Notes about this task group.	Text (2000 chars max)						

Timesheet Fields

Timesheet data can be both exported and imported. The following fields are supported:

Field	Description	Format
Employee	Employee login name. This field or Employee.ID is required when importing.	Text
Employee.ID	Employee ID. This field or Employee is required when importing.	Text
Employee.Type	The type of employee, for example Non-exempt or Exempt.	Text
Start	Time entry start date and time. This field or Date is required.	Date-Time
Date	Time entry start date. You would use this field instead of Start if you do not care about the time of day of the time entry. This field or Start is required.	Date
Finish	Time entry finish date and time. This field or Hours is required if adding a new time entry.	Date-Time
Hours	Time entry hours. This or Finish is required if adding a new time entry.	Number
Type	Time entry type, either Work or Leave.	Text
Work	Work hours.	Number
Leave	Leave hours.	Number
Pay Code	Pay code name or ID.	Text
Pay Code.ID	Pay code ID.	Text
Reporting Group	Reporting group name.	Text
Reporting Group.ID	Reporting group ID.	Text
Customer	Customer name.	Text
Customer.ID	Customer ID.	Text
Project Group	Project group name.	Text
Project Group.ID	Project group ID.	Text
Project	Project name.	Text
Project.ID	Project ID.	Text
Task Group	Task group name.	Text
Task Group.ID	Task group ID.	Text
Task	Task name.	Text
Task.ID	Task ID.	Text
Bill Rate	Bill rate for this time entry.	Number
Bill Amount	Bill amount for this time entry, which is Bill Rate x Hours.	Number

Pay Rate	Pay rate for this time entry.	Number
Pay Amount	Pay amount for this time entry, which is Pay Rate x Hours.	Number
Notes	Time entry notes.	Text (2000 chars max)
Regular Time	Regular time hours.	Number
Over Time	Over time hours.	Number
Double Time	Double time hours.	Number
Flex Time	Flex-time hours.	Number
Submitted	Indicates whether this time entry has been submitted (locked). Possible values are Yes or No.	Text
Submit Date	The date this time entry was submitted.	Date
Submitted By	Who submitted this time entry.	Text
Approved	Indicates whether this time entry has been approved. Possible values are Yes or No.	Text
Approval Date	The date this time entry was approved.	Date
Approved By	Who approved this time entry.	Approver
Rejected	Indicates whether this time entry has been rejected by an approver. Possible values are Yes or No.	Text
Reject Date	The date this time entry was rejected.	Date
Rejected By	Who rejected this time entry.	Text

Importing Timesheets

Importing timesheets is something we usually like to help customers with as it requires careful planning, including backing up the database beforehand so you can revert it if for some reason the data is wrong. Typically, to get started, you would export a representative set of timesheets and save it as a CSV file (from the Timesheets tab), then trim out the unneeded columns. This can then be used as a template. Here are some important things to know about the import data format:

1. You can use either the name of objects (e.g. the employee login name, the group name, etc.), or the ID of the object, e.g. the employee id or the group id.
2. At a minimum, you'll want the Employee (login name), Start and Hours columns. The Start field needs the time of day if there is more than one time entry for a single day. This is because the timesheet import will try to update an existing time entry, so if you have two records for the same employee with the same start, the second one will just update the first one. This avoids the danger of accidentally re-importing the same file twice and getting duplicate time entries.
3. The date, time and number formats are in the locale of the person doing the import. Also, the Start etc. fields are assumed to be in the time zone of the person doing the import. So if you are importing data for people in time zones scattered around the globe you might have to make some adjustments.
4. For time off or leave, you'll want to specify the appropriate pay code name or pay code ID.

5. To mark the timesheet as locked or submitted, add the Submitted field or column, and specify Yes for each timesheet entry.

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Data Archival

Time entries, asset entries and other data that are entered in large amounts will generally be kept by Pacific Timesheet for up to 7 years before being moved into archival storage. For performance reasons, however, large systems that have over several million entries may archive data sooner, such as after 6 or 5 years. Generally this will be transparent to you, but you may see a message when running reports for date ranges several years back, such as:

Data prior to 1/1/2009 has been archived...

In these cases you can still report on archived data by clicking the provided link to the "Archive Settings" dialog and temporarily altering the report to target the archived data table. This allows you to run all of your reports on older archived data for auditing purposes, etc.

Note that archived data older than 7 years may be purged (deleted) from the system in order to prevent using up your allotted disk storage. You can contact your account representative about extending this if you need to preserve archive data beyond 7 years.

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Administrative Topics

Q: How do I allow managers to edit their worker's timesheets?

A: By default a manager cannot edit other employee timesheets, even if they are an approver for them. To allow a manager to edit other employee timesheets do the following:

1. Make sure the manager, let's call her "Sarah Manager", has either the Manager permission level, or a permission level that allows timesheet editing. You can check an employee's permission level from the Employees tab. You can check whether a permission level has the timesheet editing permission from the System > Security page.
2. Go to the Employees > Groups page and create a new group.
3. Assign all of the employees whose timesheets Sarah Manager needs to edit to this group.
4. Edit the permissions for this group and add Sarah Manager to the list as a Manager (or any other appropriate permission level that allows timesheet editing).

When Sarah Manager logs into the application she should see a Timesheets tab, and should be able to list and edit timesheets for all the employees in the new group.

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- [Locale Codes](#)
- [Time Zone Codes](#)

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ISO locale (language_country) codes:

Value	Description
sq_AL	Albanian (Albania)
ar_DZ	Arabic (Algeria)
ar_BH	Arabic (Bahrain)
ar_EG	Arabic (Egypt)
ar_IQ	Arabic (Iraq)
ar_JO	Arabic (Jordan)
ar_KW	Arabic (Kuwait)
ar_LB	Arabic (Lebanon)
ar_LY	Arabic (Libya)
ar_MA	Arabic (Morocco)
ar_OM	Arabic (Oman)
ar_QA	Arabic (Qatar)
ar_SA	Arabic (Saudi Arabia)
ar_SD	Arabic (Sudan)
ar_SY	Arabic (Syria)
ar_TN	Arabic (Tunisia)
ar_AE	Arabic (United Arab Emirates)
ar_YE	Arabic (Yemen)
be_BY	Belarusian (Belarus)
bg_BG	Bulgarian (Bulgaria)
ca_ES	Catalan (Spain)
zh_CN	Chinese (China)
zh_HK	Chinese (Hong Kong)
zh_TW	Chinese (Taiwan)
hr_HR	Croatian (Croatia)
cs_CZ	Czech (Czech Republic)
da_DK	Danish (Denmark)
nl_BE	Dutch (Belgium)
nl_NL	Dutch (Netherlands)
en_AU	English (Australia)
en_CA	English (Canada)
en_IN	English (India)
en_IE	English (Ireland)
en_NZ	English (New Zealand)
en_ZA	English (South Africa)
en_GB	English (United Kingdom)
en_US	English (United States)
et_EE	Estonian (Estonia)
fi_FI	Finnish (Finland)
fr_BE	French (Belgium)
fr_CA	French (Canada)
fr_FR	French (France)
fr_LU	French (Luxembourg)

fr_CH	French (Switzerland)
de_AT	German (Austria)
de_DE	German (Germany)
de_LU	German (Luxembourg)
de_CH	German (Switzerland)
el_GR	Greek (Greece)
iw_IL	Hebrew (Israel)
hi_IN	Hindi (India)
hu_HU	Hungarian (Hungary)
is_IS	Icelandic (Iceland)
it_IT	Italian (Italy)
it_CH	Italian (Switzerland)
ja_JP	Japanese (Japan)
ko_KR	Korean (South Korea)
lv_LV	Latvian (Latvia)
lt_LT	Lithuanian (Lithuania)
mk_MK	Macedonian (Macedonia)
no_NO	Norwegian (Norway)
pl_PL	Polish (Poland)
pt_BR	Portuguese (Brazil)
pt_PT	Portuguese (Portugal)
ro_RO	Romanian (Romania)
ru_RU	Russian (Russia)
sk_SK	Slovak (Slovakia)
sl_SI	Slovenian (Slovenia)
es_AR	Spanish (Argentina)
es_BO	Spanish (Bolivia)
es_CL	Spanish (Chile)
es_CO	Spanish (Colombia)
es_CR	Spanish (Costa Rica)
es_DO	Spanish (Dominican Republic)
es_EC	Spanish (Ecuador)
es_SV	Spanish (El Salvador)
es_GT	Spanish (Guatemala)
es_HN	Spanish (Honduras)
es_MX	Spanish (Mexico)
es_NI	Spanish (Nicaragua)
es_PA	Spanish (Panama)
es_PY	Spanish (Paraguay)
es_PE	Spanish (Peru)
es_PR	Spanish (Puerto Rico)
es_ES	Spanish (Spain)
es_UY	Spanish (Uruguay)
es_VE	Spanish (Venezuela)
sv_SE	Swedish (Sweden)
th_TH	Thai (Thailand)

th_TH	Thai (Thailand,TH)
tr_TR	Turkish (Turkey)
uk_UA	Ukrainian (Ukraine)
vi_VN	Vietnamese (Vietnam)

-0-

Standard (Olson ID) time zones codes:

Value	Description
MIT	(GMT-11:00) International Date Line W.
Pacific/Apia	(GMT-11:00) Midway Island, Samoa
Pacific/Honolulu	(GMT-10:00) Hawaii
America/Anchorage	(GMT-09:00) Alaska
America/Los_Angeles	(GMT-08:00) Pacific Time
America/Denver	(GMT-07:00) Mountain Time
America/Phoenix	(GMT-07:00) Arizona
America/Chicago	(GMT-06:00) Central Time
America/Costa_Rica	(GMT-06:00) Central America
America/Mexico_City	(GMT-06:00) Mexico City
America/Tegucigalpa	(GMT-06:00) La Paz
America/Winnipeg	(GMT-06:00) Saskatchewan
America/Bogota	(GMT-05:00) Bogota
America/Indianapolis	(GMT-05:00) Indiana (East)
America/Montreal	(GMT-05:00) Atlantic Time (Canada)
America/New_York	(GMT-05:00) Eastern Time
America/Caracas	(GMT-04:00) Caracas, La Paz
America/Santiago	(GMT-04:00) Santiago
America/Thule	(GMT-04:00) Greenland
America/St_Johns	(GMT-03:30) Newfoundland
America/Buenos_Aires	(GMT-03:00) Buenos Aires
America/Sao_Paulo	(GMT-03:00) Brasilia
Atlantic/South_Georgia	(GMT-02:00) Mid-Atlantic
Atlantic/Azores	(GMT-01:00) Azores
Atlantic/Cape_Verde	(GMT-01:00) Cape Verde Is.
Africa/Casablanca	(GMT+00:00) Casablanca, Monrovia
Europe/Dublin	(GMT+00:00) Greenwich Mean Time
Africa/Lagos	(GMT+01:00) West Central Africa
Europe/Amsterdam	(GMT+01:00) Amsterdam, Rome
Europe/Belgrade	(GMT+01:00) Belgrade, Prague
Europe/Brussels	(GMT+01:00) Brussels, Madrid
Europe/Warsaw	(GMT+01:00) Sarajevo, Warsaw
Africa/Cairo	(GMT+02:00) Cairo
Africa/Harare	(GMT+02:00) Harare, Pretoria
Asia/Jerusalem	(GMT+02:00) Jerusalem
Europe/Athens	(GMT+02:00) Athens, Istanbul
Europe/Bucharest	(GMT+02:00) Bucharest
Europe/Helsinki	(GMT+02:00) Helsinki
Africa/Nairobi	(GMT+03:00) Nairobi
Asia/Baghdad	(GMT+03:00) Baghdad
Asia/Kuwait	(GMT+03:00) Kuwait, Riyadh
Europe/Moscow	(GMT+03:00) Moscow, St. Petersburg
Asia/Tehran	(GMT+03:30) Tehran

Asia/Baku	(GMT+04:00) Baku, Tbilisi
Asia/Dubai	(GMT+04:00) Abu Dhabi
Asia/Kabul	(GMT+04:30) Kabul
Asia/Karachi	(GMT+05:00) Islamabad, Karachi
Asia/Yekaterinburg	(GMT+05:00) Ekaterinburg
Asia/Calcutta	(GMT+05:30) Chennai, Kolkata
Asia/Katmandu	(GMT+05:45) Kathmandu
Asia/Almaty	(GMT+06:00) Almaty
Asia/Colombo	(GMT+06:00) Sri Jayawardenepura
Asia/Dhaka	(GMT+06:00) Astana, Dhaka
Asia/Rangoon	(GMT+06:30) Rangoon
Asia/Bangkok	(GMT+07:00) Bangkok, Hanoi
Asia/Krasnoyarsk	(GMT+07:00) Krasnoyarsk
Asia/Hong_Kong	(GMT+08:00) Beijing, Hong Kong
Asia/Irkutsk	(GMT+08:00) Irkutsk
Asia/Kuala_Lumpur	(GMT+08:00) Kuala Lumpur, Singapore
Asia/Taipei	(GMT+08:00) Taipei
Australia/Perth	(GMT+08:00) Perth
Asia/Seoul	(GMT+09:00) Seoul
Asia/Tokyo	(GMT+09:00) Osaka, Tokyo
Asia/Yakutsk	(GMT+09:00) Yakutsk
Australia/Adelaide	(GMT+09:30) Adelaide
Asia/Vladivostok	(GMT+10:00) Vladivostok
Australia/Brisbane	(GMT+10:00) Brisbane
Australia/Hobart	(GMT+10:00) Hobart
Australia/Sydney	(GMT+10:00) Canberra, Sydney
Pacific/Guam	(GMT+10:00) Guam
Asia/Magadan	(GMT+11:00) Magadan, Solomon Is.
Pacific/Auckland	(GMT+12:00) Auckland
Pacific/Fiji	(GMT+12:00) Fiji, Kamchatka
Pacific/Tongatapu	(GMT+13:00) Nuku'alofa

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