Time Tracking for SharePoint 2007 Solution End User Guide

Solution Description

This solution provides a system for employees to log the time they have spent on different projects, work, and/or administrative items each week. The time entered is then aggregated into various reports for management review. It can be extended to include payroll processing. Views are provided for management reporting, client or project billing, and payroll processing.

Solution Category: Classic Line-of-Business

Primary Design Pattern: Matrix

For a diagram of a common scenario for this solution, see the last page of this document.

When to Use This Solution

Some useful scenarios enabled by the Time Tracking solution are as follows:

1. An Administrator maintains a list of projects, and individuals select projects from this list to charge time to. Each person's project list is personalized so that it is remembered week-to-week.
2. Individuals record hours spent on projects and administrative time for a typical 40-hour work week.
3. A Supervisor or Project Manager reviews a week's time for an individual and marks it as processed. A time entry can be placed on hold or rejected, and comments can be saved to explain the decision.

How to Use the Time Tracking Solution

Time Maint Tab

Before anyone can use the Time Tracking solution, someone must set up the available projects that can be referenced for time charges. Do this from the Time Maint tab.

To add a project, select the Add New Project action and click Go. Type the name of the new project in the Project field and click OK. The project is added to the list and the Current column is set to Yes.

To remove a project so that it is no longer available for addition to an individual's project list, select the box to the left of the project name, select the Make project NOT current action, and click Go. Users who already have the project set up as one of their available projects will still be able to charge time against it. However, users who do not already have a non-current project in their My Projects to Charge will not be able to add it.

You may want to change security on the Projects list to limit who can update this master projects list.

Home Tab

This provides basic instructions and guidelines for using the Time Tracking solution, followed by a Time Charge Chart that depicts how all time entered in the system was allocated during the previous work week.

My Time Tab

This displays all of the time charge entries that have been made by the currently logged in user. The top display shows any charges that are either rejected or on hold, while the bottom entry shows all other time charges.

Additional options off the My Time tab are used to enter time charges and maintain the projects that the currently logged in user is assigned to work on.

Maintain My Available Projects to Charge

This view, accessed from the cascading menu under the My Time tab, provides an interface to set up a list of projects the currently logged in user can charge. This must be completed before time can be charged on the Enter My Time view.

To add a project to your list of projects to charge:

1. Go to the Available Projects on the right side of the page. This shows all of the current projects (as maintained by the project manager on the Time Maint tab).
2. Place a mark in the appropriate checkbox(es).
3. Select the Add project to my projects to charge action from the drop-down.
4. Click Go. The page is refreshed and the selected projects are added to the My Projects to Charge on the left side of the page. When you go to Enter My Time, the project(s) will be available for selection.

This view is also used to remove projects from your list of projects that can be charged:

1. In the My Projects to Charge area, place a mark in the checkbox to the left of the project you want to remove.
2. Select the Remove project from my projects to charge action.
3. Click Go. The page is refreshed and the selected project is removed from the My Projects to Charge area. It is also removed from the Enter My Time view.

Enter My Time

The **My Time > Enter My Time** page is used to maintain the time charges to the various projects you work on each week, and log any administrative time (e.g., vacation, personal, training).

<u>To Charge Time to a Project:</u>

1. Go to the My Available Projects section and place a mark in the checkbox next to each project for which you want to enter time.
   - If you do not see a project for which you want to enter time, you need to add it to your list of available projects. This is done via the “Maintain My Available Projects to Charge” view.

2. Select the Add project(s) for time entry this week action and click Go. An entry for each selected project is placed in the Enter Time Charge Values Here section.
3. Type the number of hours you want to charge to each project in the Hours column.
   - Do not modify the dates or times in the Begin and End columns.
4. You can enter your hours throughout the week, or you can just come to this site once and enter them all at one time.
   - If you want to enter your hours throughout the week, you can stop here.
   - If you are finished entering your hours for this project for the week, place a mark in the Done box. This indicates to your supervisor that the week's hours are ready to be reviewed. The next time you refresh the page, the hours will be displayed in the My Time Charge Entries section.

To Charge Administrative Time:

1. Select the Add Administrative Time for This Week action from the Administrative Time Entry section of the page. An entry box is displayed.
2. Type the number of hours at the Hours prompt.
3. Select the appropriate type of administrative time from the Time Type drop-down.
4. Click Go. An entry is placed in the Enter Time Charge Values Here section.
5. As with charging time to a project, you have two choices at this point:
   - If you want to enter additional administrative hours throughout the week, you can stop here.
   - If you are finished entering your administrative hours for the week, place a mark in the Done box. This indicates to your supervisor that the week's administrative hours have been entered and are ready to be reviewed. The next time you refresh the page, the hours will be displayed in the My Time Charge Entries section.

To Modify Your Time Charges:

You may want to go back and edit the hours you have entered for the week after you have marked them "Done." To do this:

1. Go to the My Time Charge Entries section on the right side of the page. Select the item(s) you want to edit by placing a mark in the checkbox to the left of each item.
2. Select the Edit time charge entry action from the drop-down.
3. Click Go. A window appears showing editable fields for the selected item(s).
4. When you are finished, click Go.

To Notify Someone To Review Your Time Charges

The Email Time Sheet action is available from the drop-down selection on My Time Charge Entries on the Enter My Time page. You can use this action if you want to make someone aware of one or more time entries, or if you need someone to review and approve your time. Check the box to the left of the item(s) you want the person to see, then select Email Time Sheet from the drop-down and click Go.

Processing Tab

Instructions for using the Processing options are provided on the main Processing tab. If you wish, these instructions can be customized for your organization via the Instructions list.

This solution has been designed with the flexibility to fit into most organizations' processes, so it is up to your organization to determine how and where time is processed and/or approved, and by whom.

This tab is meant to be used by supervisors, project managers, and payroll specialists who need to view and approve time charges. Several views of time charges are available, including:

- View Submitted by Person
- View Submitted by Project or Time Type
- View On Hold
- View Rejected

Once the time charge entries have been reviewed, each of these views provides access to up to three actions. The available actions vary slightly depending on the view.

- Mark entry as processed – Changes the Stage to Processed and records the person who processed the entry and at what time in the History field.
- Reject time entry and notify – Changes the Stage to Rejected and prompts the user to enter an explanation in the Description field. This action also records the person who processed the entry and at what time in the History field. It then sends an explanatory email to the individual who entered the time charge and cc's the person who executed this action.
- Change Stage and add comment – Prompts the user for a new Stage and for a reason for the change in the Description field. Also records the person who processed the entry and at what time in the History field.

NOTE	If you change the Stage to "On Hold," the entry will not be seen or used in final reports.

Reports Tab

This tab presents two reports, both of which show only those items with a Stage of "Processed."

- View Processed Time by Person
- View Processed Time by Project or Time Type

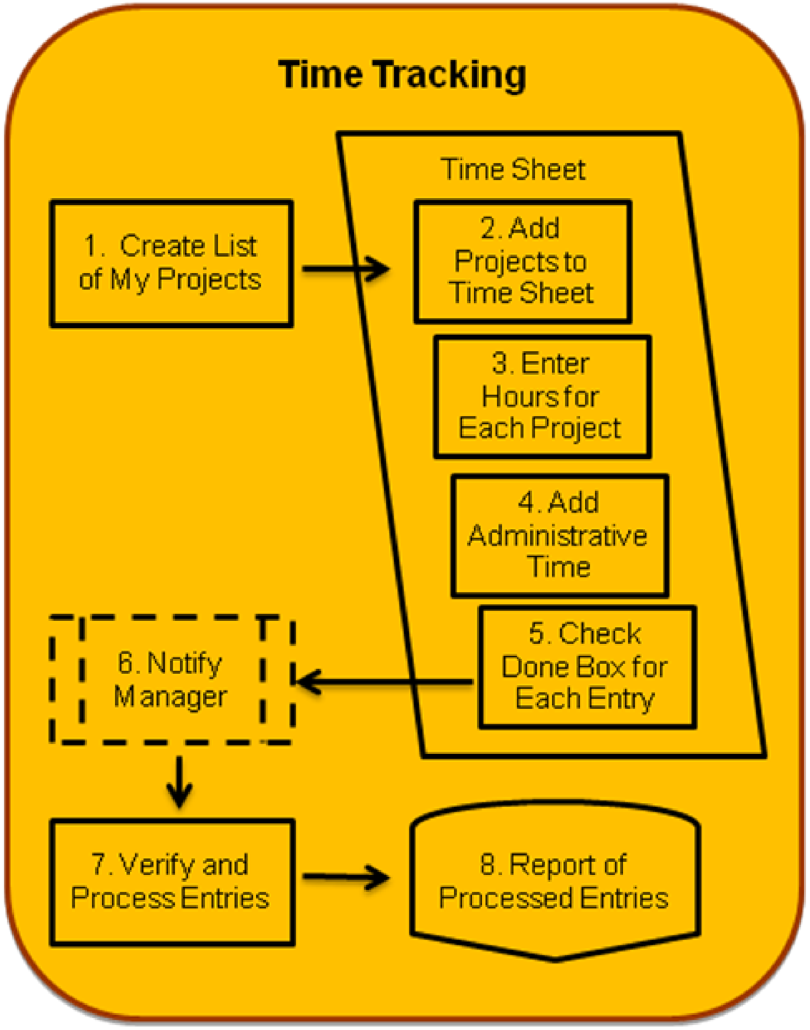
Both of these reports allow you to use the "Change Stage and add comment" action. This action prompts the user for a new Stage and for a reason for the change in the Description field. It also records the person who processed the entry and at what time in the History field.

When a pay period crosses two months, all of the week's time is added to the later month in the reports.

Tech Admin Tab

This tab provides quick access to administrative web parts that are used to create, define, and modify actions, create custom roll-ups and active displays, and configure email notifications.

Time Tracking Process Diagram



Time Tracking Process (How)

1. **Create personal list of eligible projects**
   (Follow instructions on Maintain My Available Projects to Charge page under My Time tab)
2. **Add projects from eligible list to week's time sheet**
   (Enter My Time page under My Time tab; check projects and select "Add to… time sheet" for the correct week)
3. **Enter hours for each project**
   (Type a number in Hours column of spreadsheet web part)
4. **Enter any administrative time**
   (Select option from Administrative time drop-down)
5. **Check Done for each entry**
   (In the spreadsheet web part, check the box in the Done column)
6. **If needed, notify manager**
   (Under My Time Charge Entries, check the entries you want to send, select Email Time Sheet from drop-down)
7. **Manager or payroll processes the entries** (Select desired view under Processing tab, check box next to time sheet entries, then select Mark entry as processed action from drop-down)
8. **Processed entries appear in reports**
   (Select desired view under Reports tab)