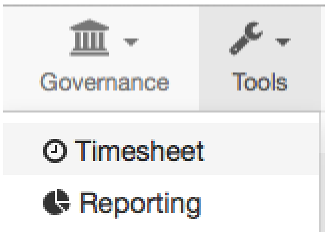
Fill a Timesheet

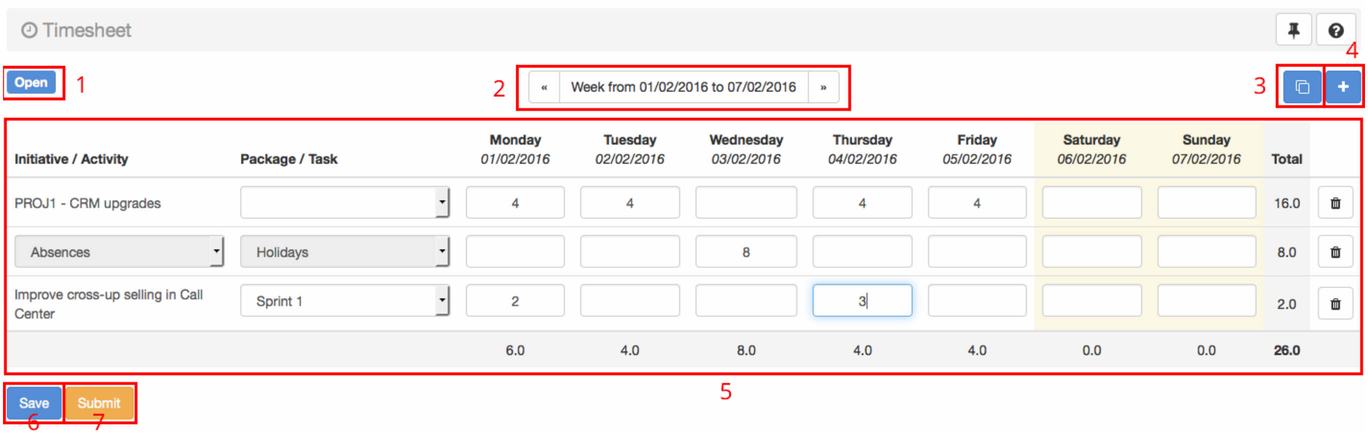
→ To fill a Timesheet, the permission TIMESHEET_ENTRY_PERMISSION is required.



Interface

The interface to fill a Timesheet is composed by 7 areas:

1. The current status: defines the life cycle of a Timesheet.
2. The week navigator: displays the selected period and the availability to switch to another.
3. The “Copy” icon: copy the events of the previous week to the selected.
4. The “Add” icon: add a new event to the selected Timesheet.
5. The logged hours: list of events with the logged hours by day. format is 1.5 = 1h30, 1.25 = 1h15…
6. The “Save” button: save all events, including the logged hours.
7. The “Submit” button: submit the Timesheet to his manager in order he approves it.



Timesheet status

The status of a Timesheet changes during its life cylce. The following table gives all status with the expected next status.

Status	Description	Next status
Open	The first status of a Timesheet is “Open”, meaning the Employee should fill and submit it.	Submitted (or Approved if the “Approve timesheet” preference is disabled, see System preferences)
Submitted	The Timesheet has been filled and submitted by the Employee and his manager should review it.	Approved or Rejected

Status	Description	Next status
Approved	The Timesheet has been reviewed and approved by the manager.	Locked (done by an automatic process that is configured according to the needs)
Rejected	The Timesheet has been reviewed and rejected by the manager. The Employee should make some corrections to the Timesheet and resubmit it.	Submitted
Locked	The Timesheet has been locked and couldn't be updated (including changing the status by the manager)	-
Unlocked	The Timesheet has been manually unlocked and should be corrected and resubmitted by the Employee.	Submitted

The “Locked” and “Unlocked” status are currently not available and will be provided with next releases.

Week navigator

The week navigator contains the selected period and offers the possibility to switch it:

- Go to the previous week by clicking on the icon «
- Select a date and go to the week that includes it by clicking on the selected period
- Go to the next week by clicking on the icon »

The “switch to another week” should be done after a Timesheet saving because the page is reloaded (else all modifications are lost).

Copy the previous week

By default a Timesheet is empty, meaning it contains no event. To fill it quickly, it's possible to automatically add the events (without the logged hours) of the previous week. To do it, the Employee should click on the “Copy” icon.

The “copy of previous week” should be done after a Timesheet saving because the page is reloaded (else all modifications are lost). The copied events are automatically saved.

Add and fill an event

There are 2 kinds of events:

- Initiative: represents an Initiative/Release of BizDock
- Activity: represents an Activity that is not an project but should be still logged

An Initiative/Release could be added only if the employee is part of it, more precisely:

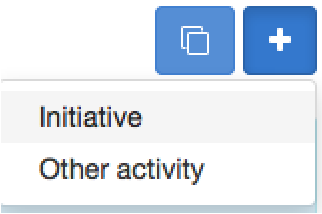
- He is the Manager,
- He is a direct or a Portfolio Stakeholder,
- He is a Portfolio Manager,
- He is a Delivery Unit Manager or Member,

All activities could be added by all Employees (without restriction). The list of activities could be managed in the administration area.

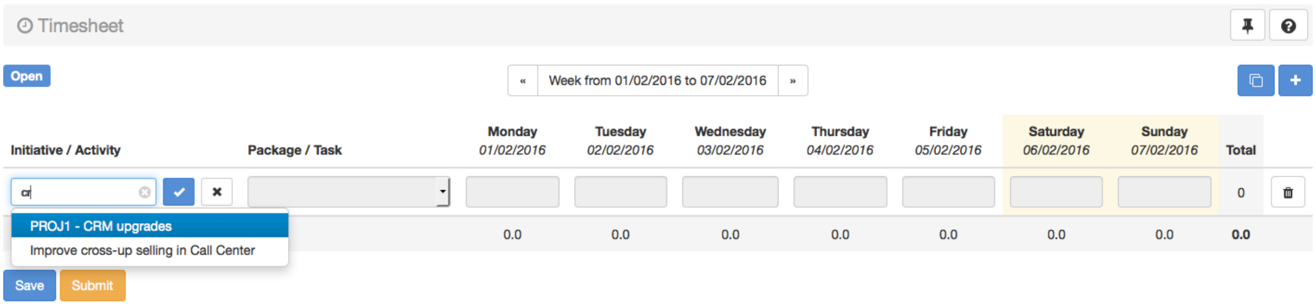
Add an Initiative/Release

Here is the process to add an Initiative/Release to a Timesheet:

1. Click on the “Add” icon and select “Initiative”



   A new row is added to the Timesheet,
2. Select an Initiative/Release by giving its name or reference



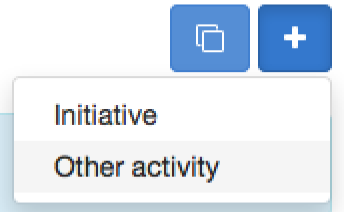
3. If necessary select a Package (could be updated later),
4. Fill the hours for the needed days.

> -When selecting an Initiative/Release, the system proposes only the ones that are available for the Employee.
> -This is not possible to fill the hours before selecting the Initiative/Release.
> -The selection of the Initiative/Release is definitive. If it's wrongly selected, the row should be simply removed.

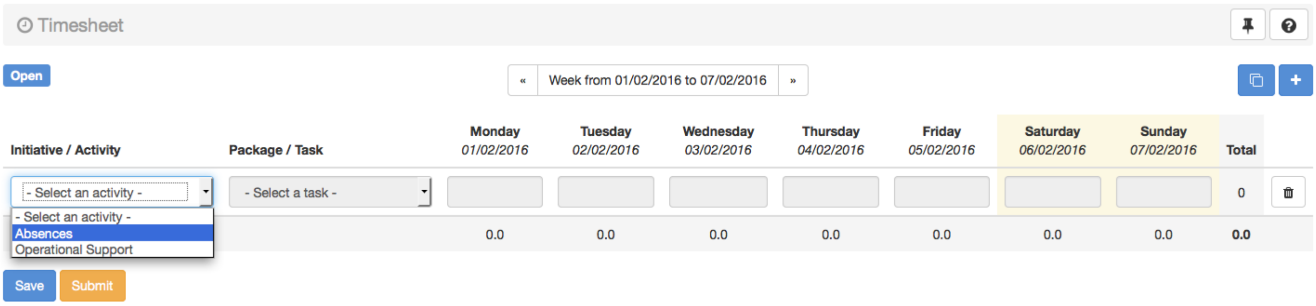
Add an Activity

Here is the process to add an Activity to a Timesheet:

1. Click on the “Add” icon and select “Other activity”

   A new row is added to the Timesheet,
2. Select an Activity type

   ,
3. Select an Activity,
4. Fill the hours for the needed days.

> -This is not possible to fill the hours before selecting the Activity.
> -The selection of the Activity type and the Activity are definitive. If it's wrongly selected, the row should be simply removed.

Remove an event

To remove an Initiative/Release or an Activity, simply click on the  icon.

Save a Timesheet

After filling the Timesheet, it should be saved by clicking on the “Save” button.

> The Timesheet is saved only when clicking on the “Save” button: if the user leave the page without saving the Timesheet then all modifications are lost.

Submit a Timesheet

If the Timesheet is fully-filled, it should be submitted for approval by clicking on the “Submit” button. The Employee's manager will receive a Notification in order to review it.

A Timesheet should be saved before submitting it.