Version 25 | Trapeze Enterprise Asset Management

Shop Activity – Timesheets

Administrator Guide

Trade Secret | February 2025

Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone:	1-877-411-8727
E-mail:	cc@trapezegroup.com
FTP Site:	https://ftps.trapezegroup.com/
Web Site:	https://collaborate.trapezegroup.com

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest Product Compatibility information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Shop Activity Timesheets - Administrator Guide

Version 25.x

February 2025

Contents

1. Overview

The Timesheet Portal is bundled with Shop Activity and available in Web Modules. The purpose of this portal is to review timesheet and timesheet entries and make any corrections needed as timekeepers, supervisors or designated users see fit. Timekeeping must be configured for this portal to work correctly. The timesheet and related entries are primarily generated upon technician clock out within Web Modules.

Please note that Timesheet portal is different from the legacy View Timesheets page that is used to review detailed labor postings by work order and service request. The Timesheet portal is best understood as a summary overview with its own set of Timesheet data generated in real-time upon employee clock in and clock out where line items are generated for regular time, shift differential time, and overtime. The Timesheet portal functions as a standalone portal and can also be accessed through the Technician and Supervisor/Work Management Portals.

Requirements

Application 25.x

Web Modules 25.x

Assumptions

This guide assumes familiarity with workflows and configuration of the application.

User defined required fields that do not appear in the Web Modules will return validation messages.

Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. This would include any character that cannot be typed with a standard keyboard.

Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.

Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Installation and Upgrade

Installation: Initial module installation on the single machine that houses the Web Modules engine and Web broadcasting elements.

Upgrade: Upgrading a previously installed instance of Shop Activity Module version 1.6.x or greater.

No installation is required for Shop Activity Supervisor Portal end user workstations.

Install Module

Please refer to the *Administrator Guide, Install and Configure Web Modules* section for instructions on installing Web Modules.

Add Shop Activity Supervisor Portal Tab to Web Modules

To make the functions of the Shop Activity Supervisor Portal available to Web Modules users, create the tab and assign rights for supervisors.

Please refer to the *Administrator Guide, Web Modules Configuration - Adding Modules and Tabs* section for detailed instructions on adding new tabs and configuring security access for those tabs.

Upgrade an Existing Web Modules Instance

Please refer to the *Administrator Guide, Install and Configure Web Modules* section for instructions on installing and upgrading Web Modules.

Add a Shop Activity Supervisor Portal Tab to Web Modules

If you have not previously added a tab to make the functions of the Shop Activity Supervisor Portal available to Web Modules users, you need to create a tab and assign rights for supervisors.

Please refer to the *Administrator Guide, Web Modules Configuration - Adding Modules and Tabs* section for detailed instructions on adding new tabs and configuring security access for those tabs.

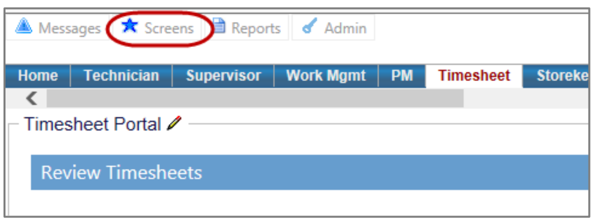
3. Timesheet Portal Setup and Configuration

To use the Timesheet portal, data must be first be setup in the application according to the steps in the following section. After setting up the data, you may configure the Timesheet portal settings.

Timekeeping Data Setup

To use the Timesheet portal, timekeeping must first be configured.

1. Log in to Web Modules.
2. At the top-left of the page, click the **Screens** shortcut button, or the **Enterprise Portal** tab to access Enterprise Portal.

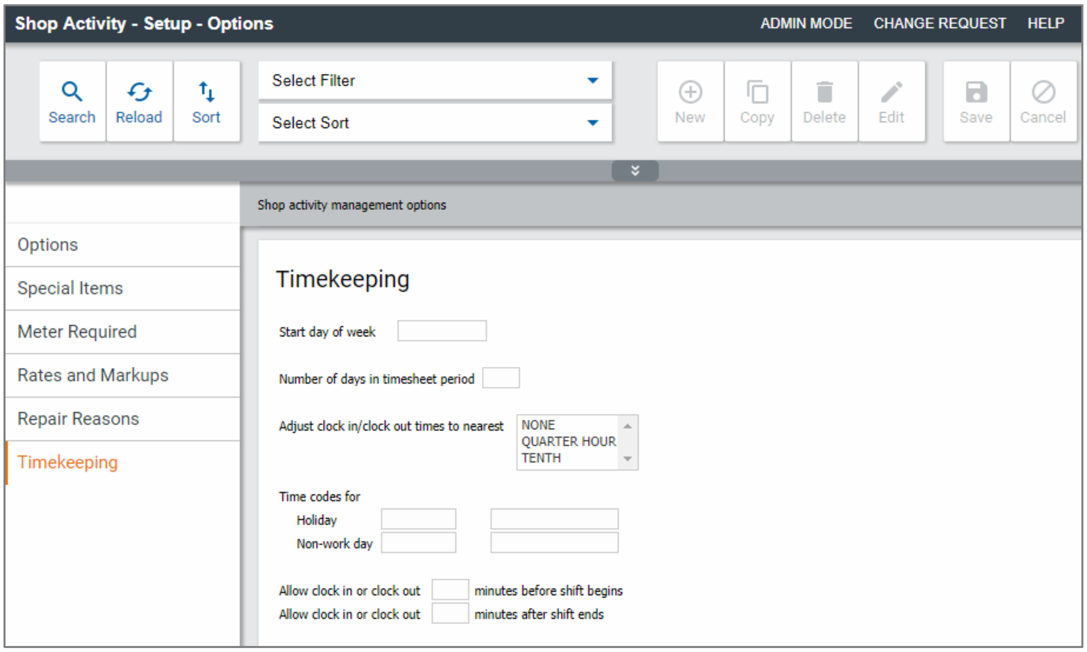


Proceed to the following sections for instructions to define data for the Timesheet portal.

Timekeeping

1. Open the **Shop Activity – Setup – Options** screen and select the Timekeeping tab.

   The Timekeeping screen displays.



2. On the Timekeeping tab, set up the following timekeeping options:

   - **Start day of week** - Used to determine the first day of a time card (Sunday, Monday, Tuesday, etc...).
   - **Number of days in timesheet period** - Used to determine last day of a time card (end date = start date + (number of days - 1)). **NOTE:** Number of days must be set and it must be a number greater than 0 or an error will occur.
   - **Adjust clock in/clock out times to nearest**
     - NONE: Date and time in/out are used as defined from clock in/out record as the adjusted date and time in/out values on an employee clock record.
     - QUARTER HOUR: Adjusted date and time in/out are round to the nearest quarter hour (:00, :15, :30, :45) from the recorded date and time in/out values on employee clock record.

Optional Configuration

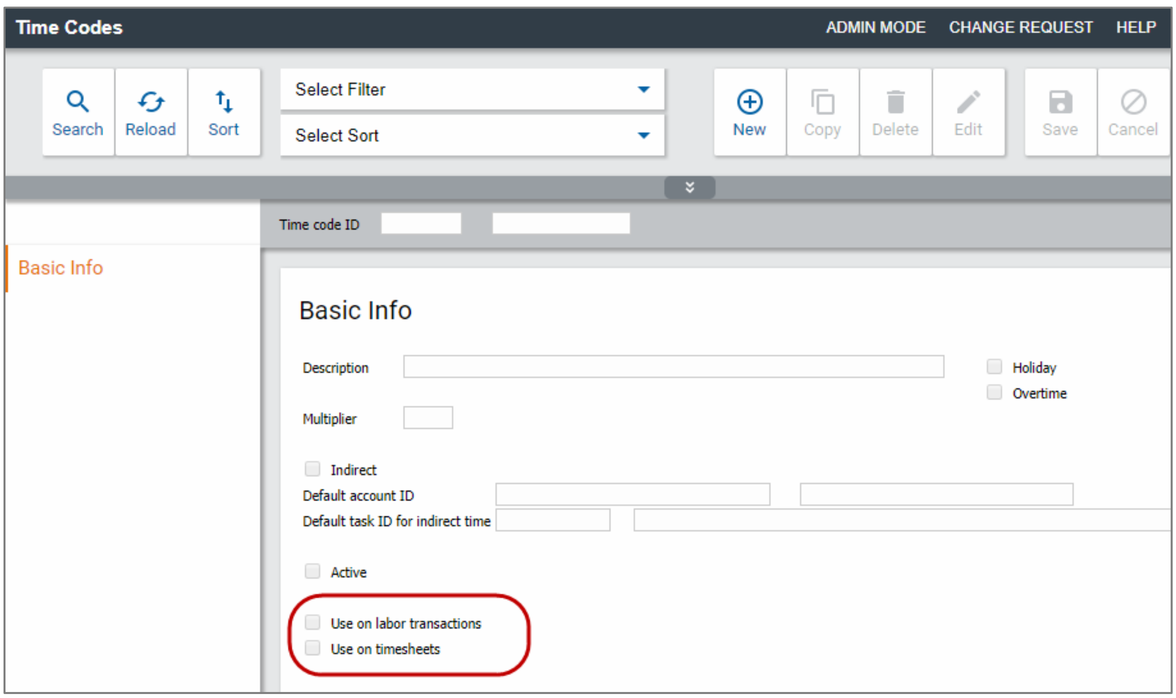
Optional Timekeeping settings include:

- Time codes for
  - Holiday
  - Non-work day
- Allow clock in __ minutes early

- Allow clock out __ minutes late

If a time code is set for these optional settings, then the respective days the time codes represent will be shown on the Timesheet as a unique row. As an example, if you set the Holiday time code field, then any holidays falling within the Timesheet's Start and End date will show on the Timesheet. This assumes any holidays specified on the work calendar have been properly generated with holidays set. Non-working days are recognized by the same start and end time on the Calendar's day pattern.

The Time Codes screen includes the checkboxes, **Use on labor transactions** and **Use on timesheets**. If the **Use on labor transactions** box is not checked, the system will validate against using the time codes on labor transactions. In such a case, the time code may be used on timesheets but may not be used to post labor directly. All screens with Time Codes require the setting to be ON *except* for the Timesheets screen. By default, during the conversion process, this setting is set to ON.

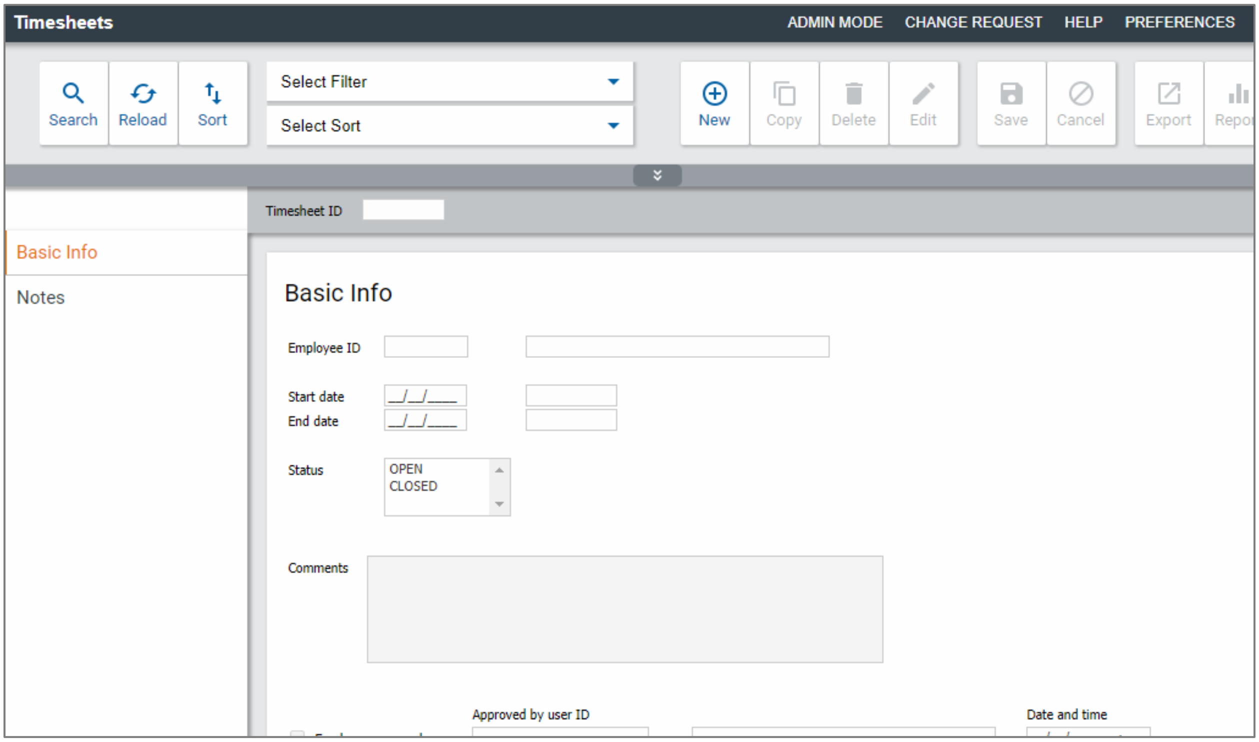


Ensure boxes are checked as desired so Time Code may be used on labor transactions and/or timesheets

Timesheets Screen

The Timesheets screen is only visible via Enterprise portal.

The Timesheets screen is where timesheets are defined.



The **Timesheet ID** is auto-generated.

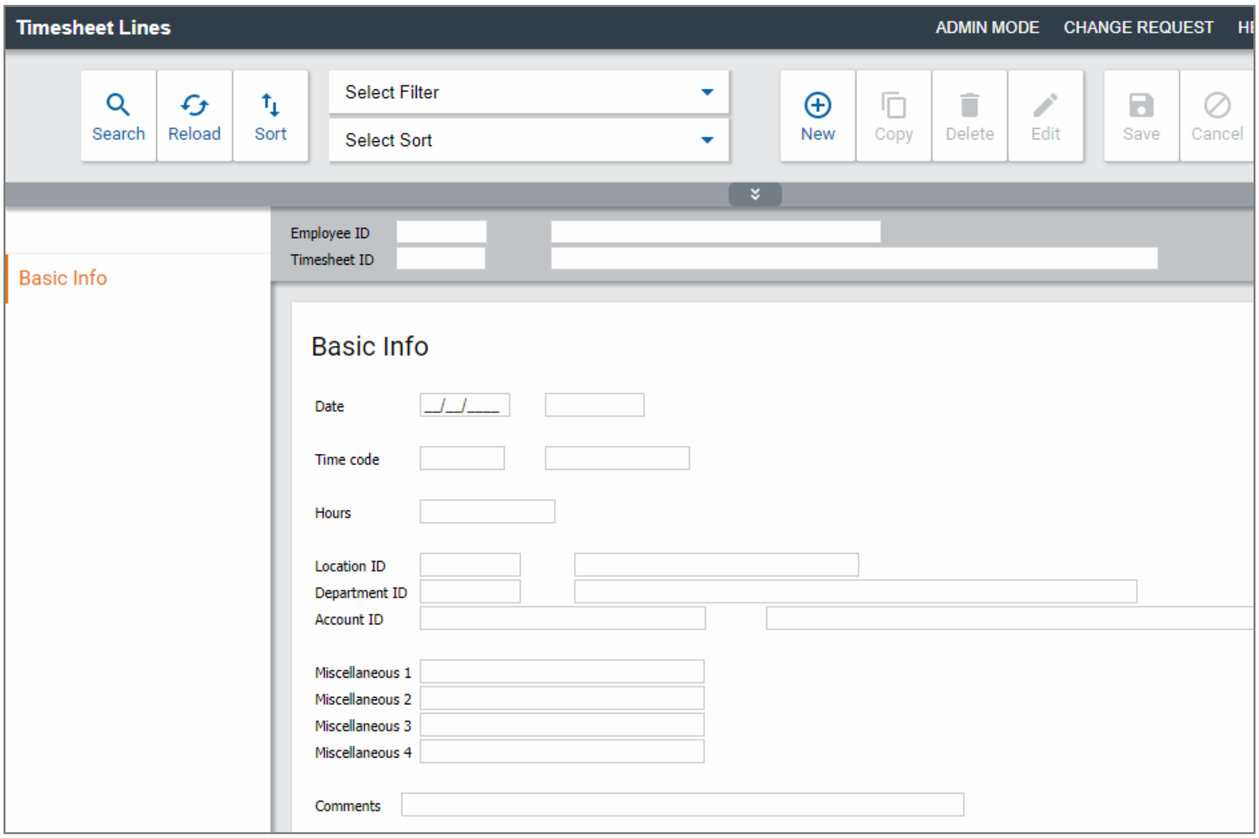
Complete the following fields:

- **Employee ID** (Required) – must be a valid and active employee.
- **Start date** (Required) – must be a valid date. When you enter a Start date, the system takes the number of days per timesheet and increments it out and fills the End date for you. You may change it if you want to.
- **End date** (Required) – must be a valid date.
- **Status** – no validation for status of the timesheet. Choose status (OPEN, CLOSED) from the choice-list. Timesheets with CLOSED status cannot be updated.

Timesheet Lines Screen

The Timesheet Lines screen is only visible via Enterprise portal.

The Timesheet Lines screen is used to insert/modify timesheet line item records.



The **Timesheet ID** must already have been created on the Timesheet screen and the Employee ID is automatically filled-in. You cannot change this field as it has to match the Employee ID on the Timesheet. The **Employee ID** must be that of a valid and active employee.

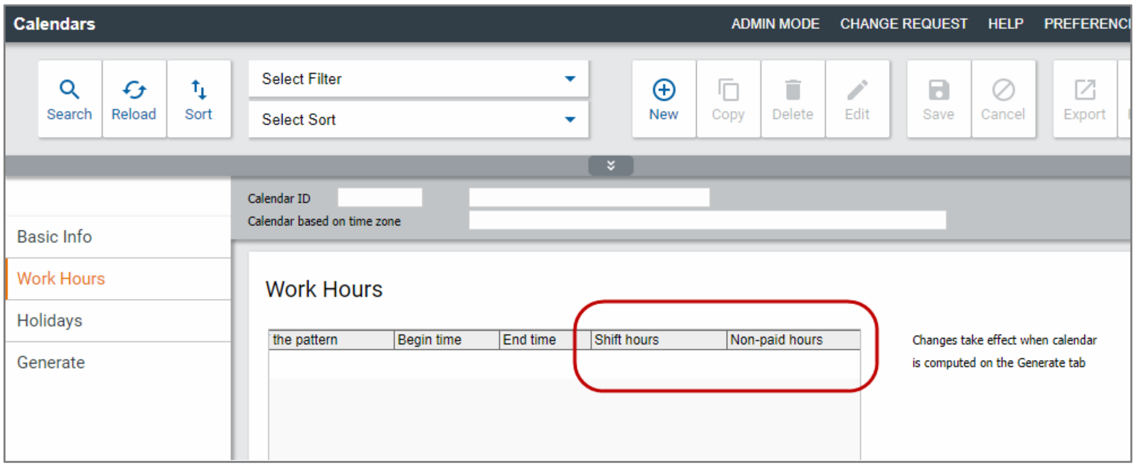
Complete the following fields:

- **Date** – choose any date between the Start and End dates.
- **Time code** – enter the time code. Example: REG (regular), OT (overtime)
- **Hours** - the number of hours worked.
- Complete the remaining (optional) fields as desired: **Location ID**, **Department ID**, **Account ID**, and **Miscellaneous.** These fields may be used for projects, reporting, interfaces, etc.

Calendars Screen Setup

To support the Timesheet portal, complete the following two fields on the Calendars screen's Work Hours tab:

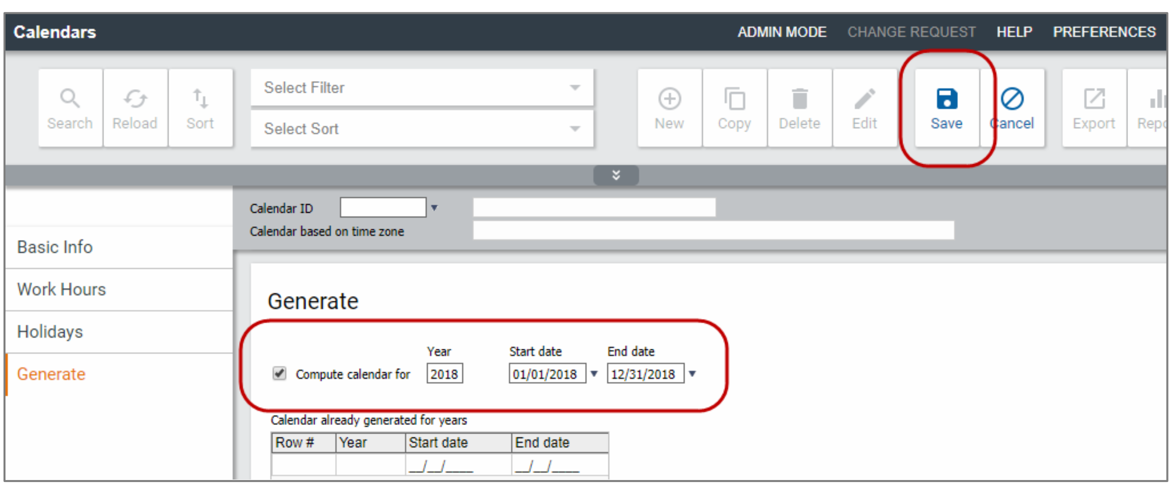
- **Shift hours** - specifies the total number of hours in a work day and includes non-paid work hours.
- **Non-paid hours** - specifies the number of non-paid work hours in a day.



Configure these fields if the calendar will be used as an employee calendar (assigned to an employee).

- **Example:** Shift Hours = 9 and Non-paid hours = 1, indicates an 8 hour day with a 1 hour reserved for breaks. Shift hours and non-paid work hours should also be defined even for "days" off if the organization supports employees working on their off days.

After setting Shift hours and Non-paid work hours in the pattern, it is necessary to re-generate the calendar from the current year to update these fields as applicable.

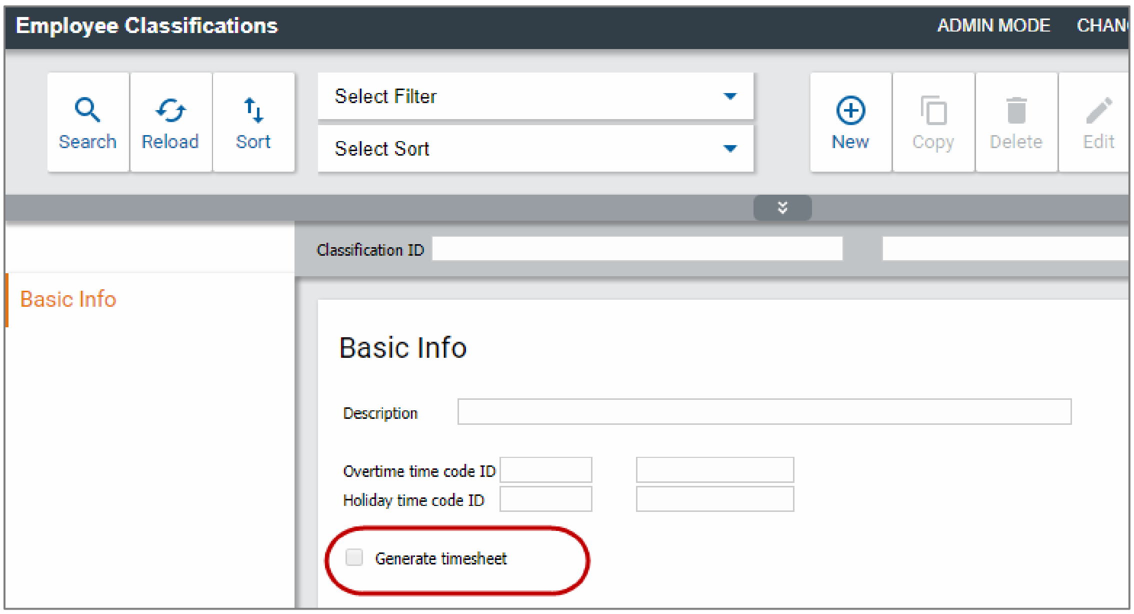


Timesheet Auto Generation Setup

Timesheets and timesheet line items can be generated based on employee clock in/out activity. To set this up, each employee needs to have a classification that generates time sheets. Each employee also needs to have a work calendar that is defined around that particular employee's schedule.

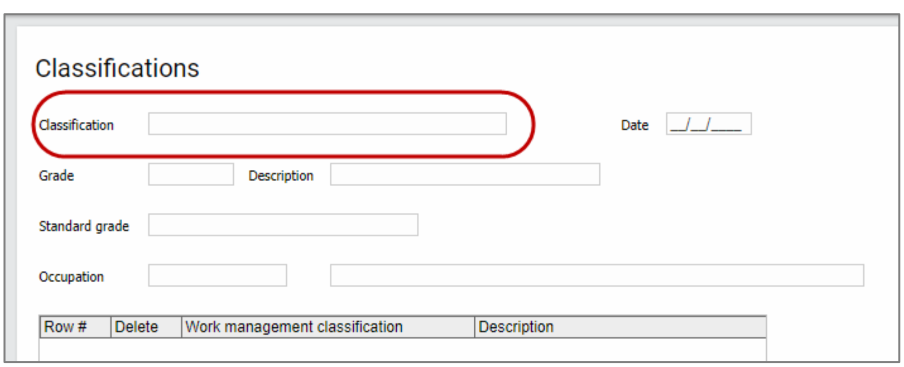
To setup employees for timesheet line item generation:

1. On the Employee Classifications screen, create a Classification ID with **Generate timesheet** checked (enabled).

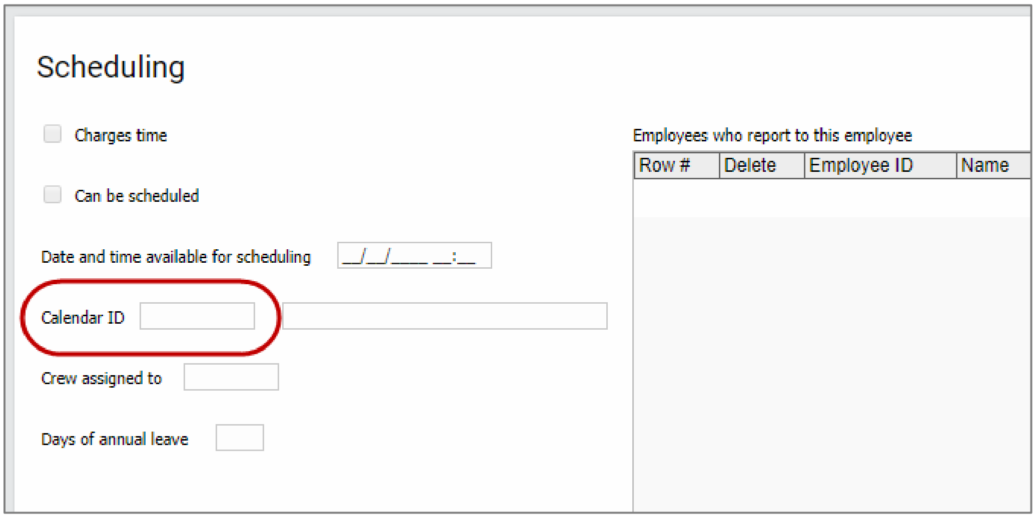


2. Add the following to the Employee record on the Employees – Primary Information screen:

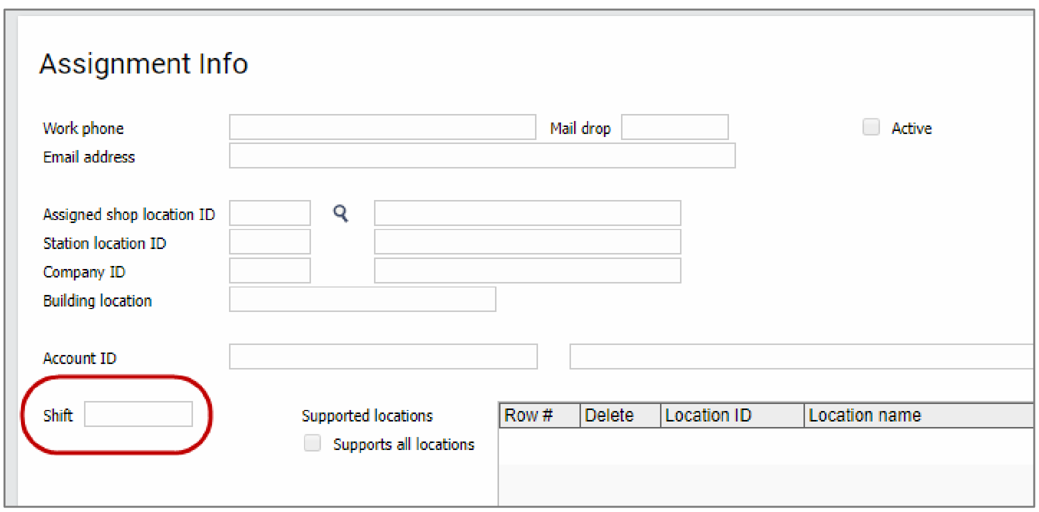
   - **Classification** (with Generate timesheet enabled)



- Calendar ID: Assign a Calendar ID on the Employees - Primary Information screen, Scheduling tab



- **Shift ID** (*Optional*): Enter a Shift on the Employees - Primary Information screen, Assignment Info tab



- Ensure timekeeping setup has been configured as outlined in sections above.

Clock In/Out

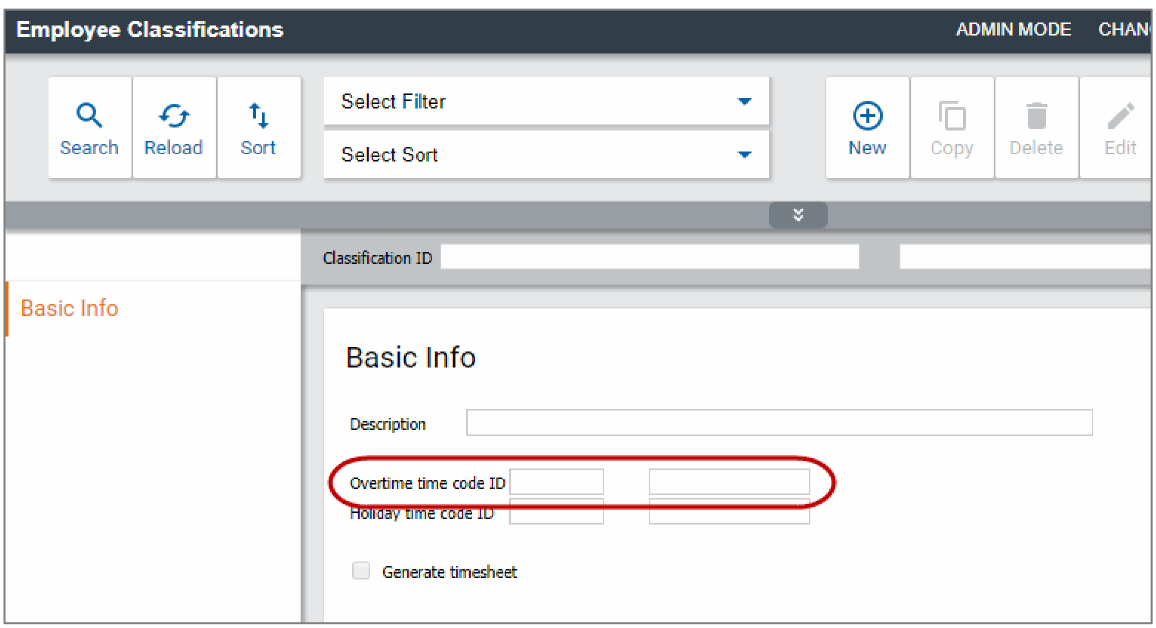
Once an employee is setup to generate timesheets, if an employee clocks out using a time code that has **Use on timesheets** enabled, the system will generate a timesheet for the date of the employee's work hours (via employee calendar) and generate a timesheet line item using the time code and hours (clock-out – clock-in) for that employee's clocked time for the current calendar day.

When the timesheet is generated, the Start date will be set to the date equal to or prior to the current date that matches the Start Day of Week value. The End date on the time sheet will be set to the Start date + number of days per timecard setting - 1 (includes the first date). If the number of days per timecard setting is less than 7, then the Start date will just match the Current date to always ensure the Current date falls within the timesheet range.

Overtime

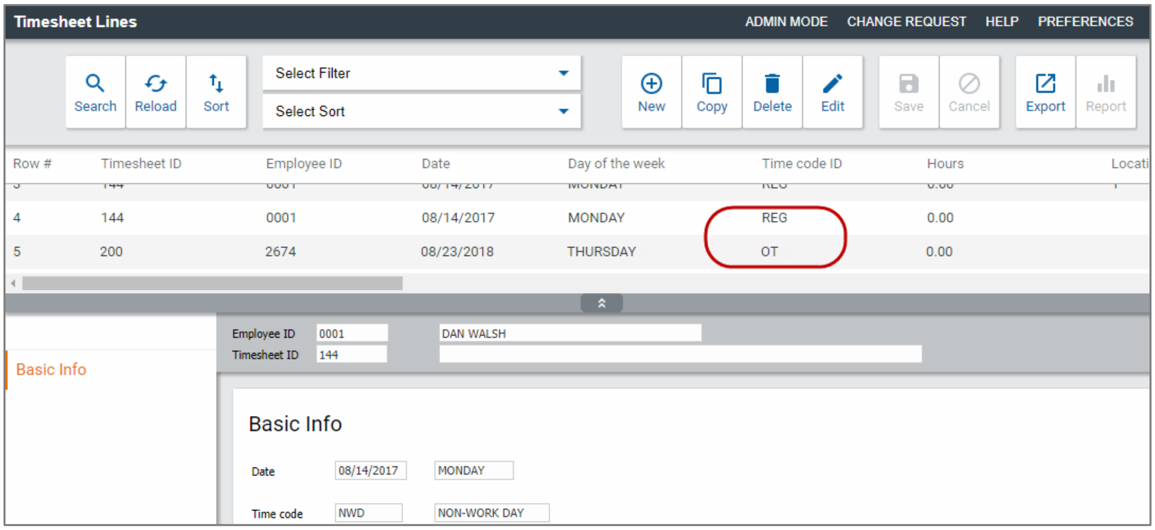
To allow Overtime, set up the following:

1. The Employee Classifications screen must have a default **Overtime time code ID** defined and **Generate timesheet** must be selected for a timesheet to be generated automatically if none exists:

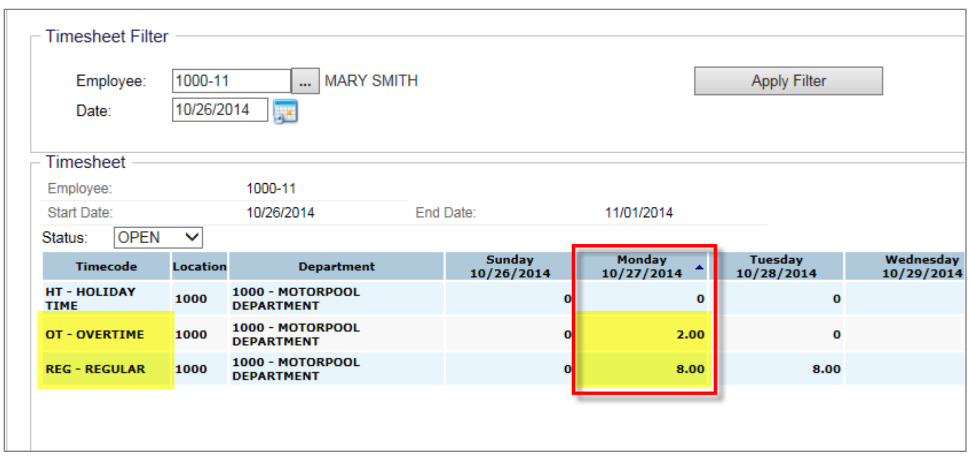


2. The Employee Calendar must have Work Hours defined as mentioned in the [Calendars Screen Setup] section above.

   As depicted in the screenshot below, if the two above items are setup and the employee clocked in session is longer than shift hours for the current calendar day, then one timesheet line will be recorded for work hours - nonpaid hours (REG-REGULAR) and another timesheet line will be inserted using the default overtime code (OT-OVERTIME) for the remaining hours the employee worked beyond the work hours from the specific calendar day.



Example of Timesheet Lines Screen Showing Overtime and Regular Hours



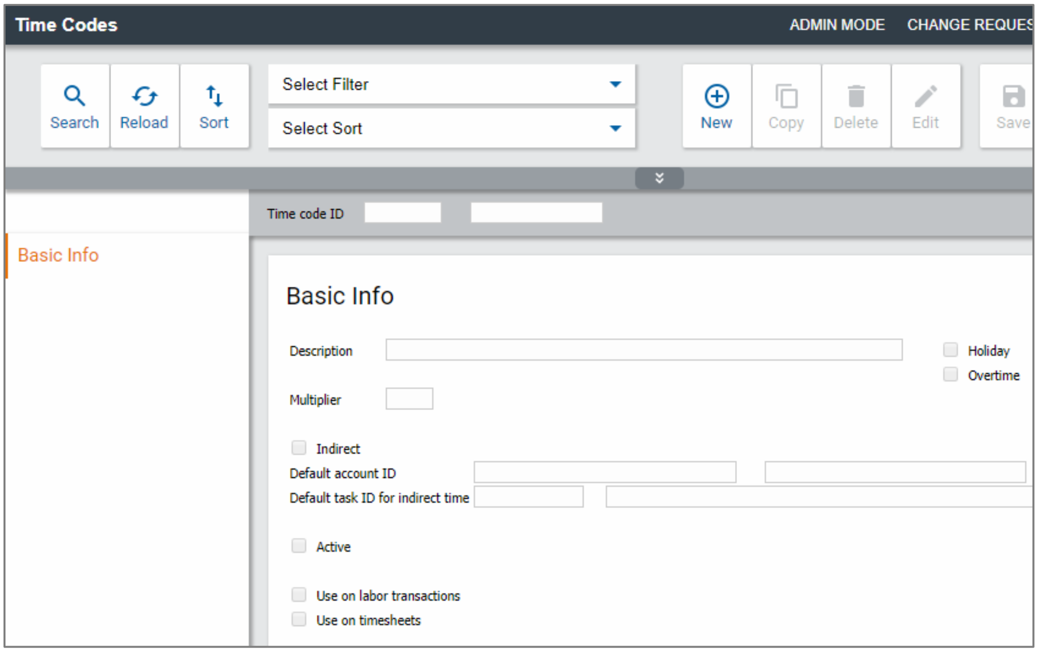
In the Timesheet Portal, the Timesheet displays Overtime and Regular Hours on separate lines

Shift Differentials

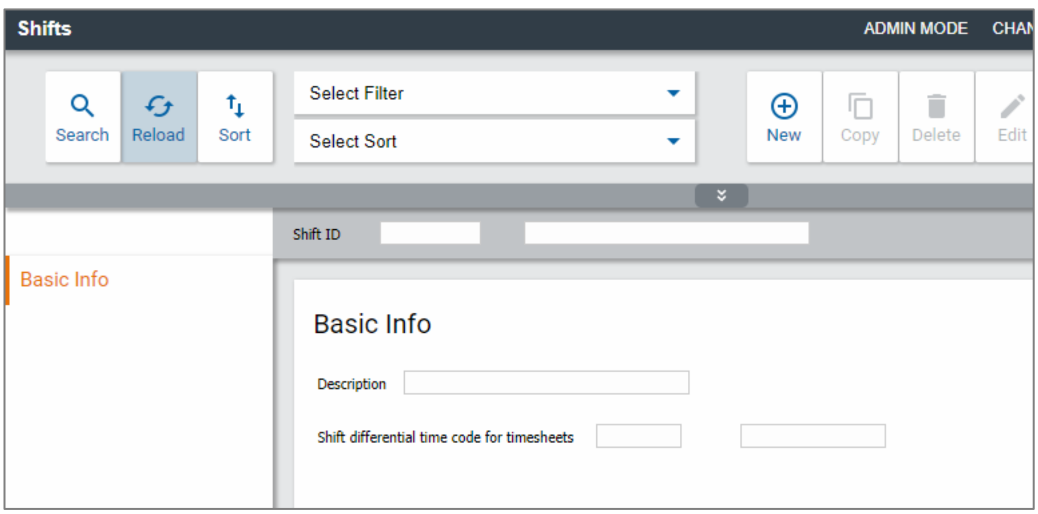
Shift differential may be used to apply additional pay for people that, for example, work the swing or graveyard shifts.

To setup Shift Differential, it is necessary to create a Shift ID and ensure the Employee is setup with the Shift ID for the differential as depicted below:

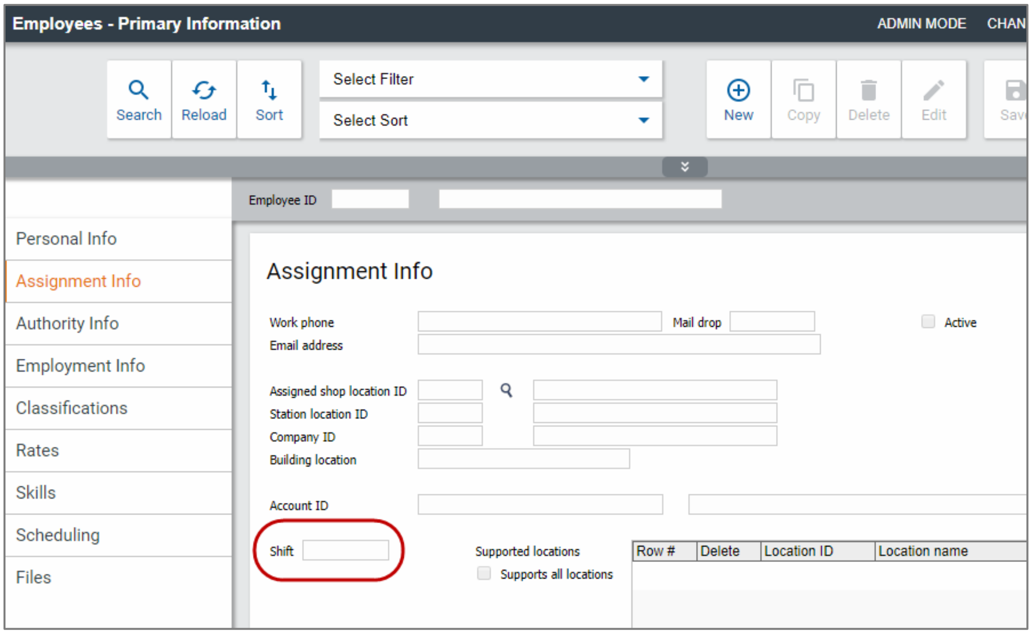
- **Time Code:** create a time code for the shift differential.



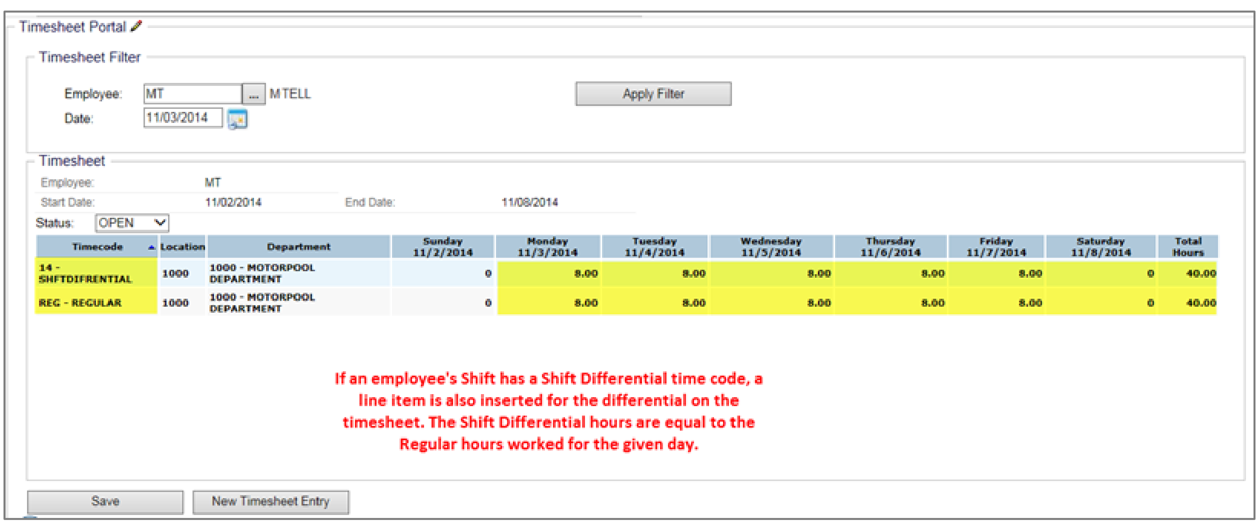
- **Shift ID:** add a Shift ID that is associated with the shift differential time code ID.



- **Employee:** add the Shift ID with the shift differential to the Employees – Primary Information screen, Assignment Info tab.



When the employee clocks out, two timesheet line items are; one for the time code used when the user clocks out, and one for the time code that is listed on the shift as the differential time code. The shift differential hours will match their normal work hours clocked for that current calendar day.



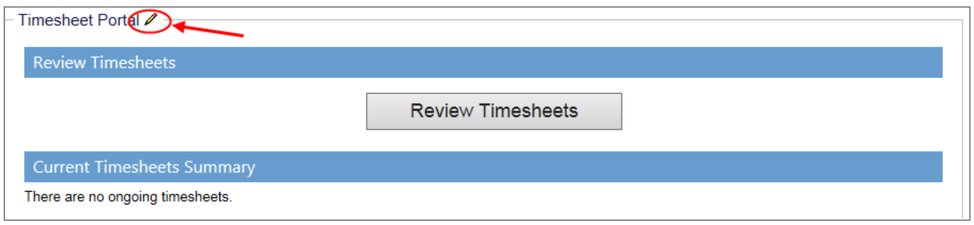
Configure Timesheet Portal Settings

1. Once you have setup the data and added the Timesheet portal tab to Web Modules, log in to Web Modules as an administrator.

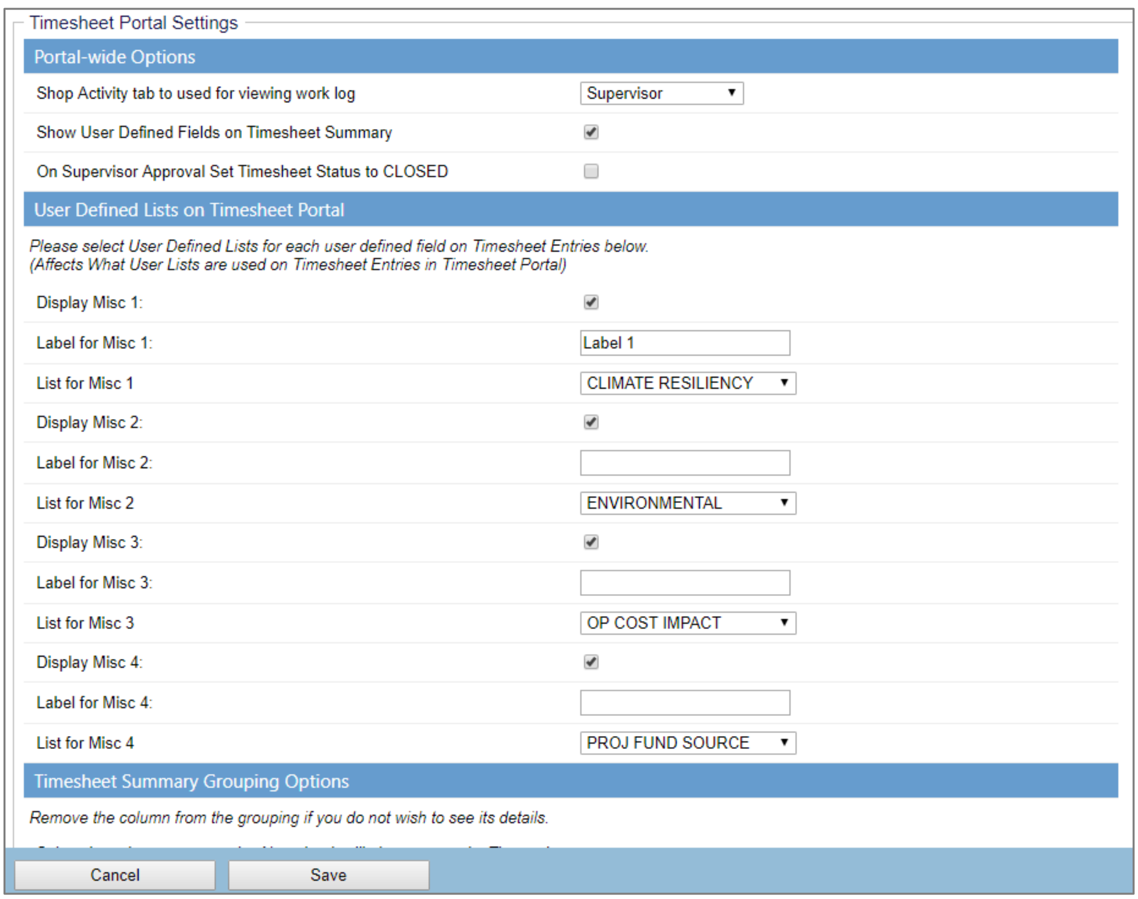
2. Click the Timesheet tab.

   The Timesheet page displays.

3. To configure the Timesheet Portal settings, click on the **pencil icon** next to the Timesheet Portal title bar.



The Timesheet Portal Settings page displays.



This page is outlined in the section below.

Timesheet Portal Settings Page

The Timesheet Portal Settings page is where you determine if user-defined fields will be shown on the Timesheet Summary, sets the defined lists for user defined fields on Timesheet entries, and allows you to set grouping options.

Portal-wide Options

- **Shop Activity tab to used for viewing work log:** Set the default Shop Activity tab to use when you view the work log.
- **Show User Defined Fields on Timesheet Summary:** Check this box show user-defined fields on the timesheet summary.

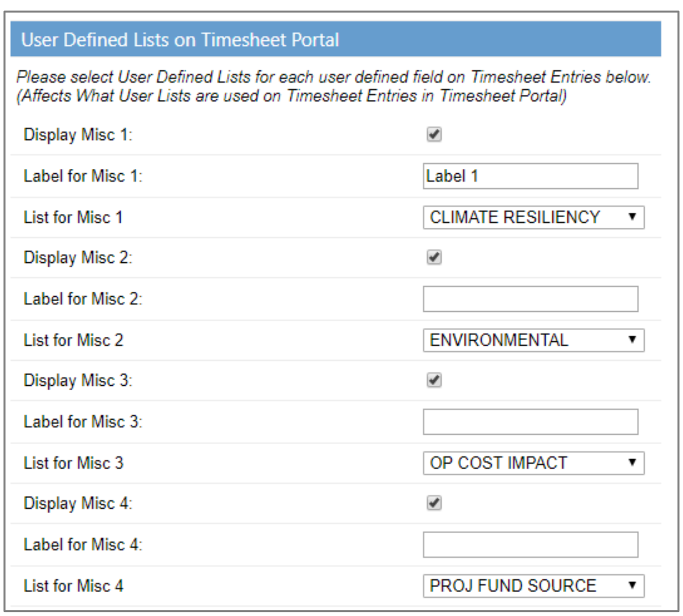
User Defined Lists on Timesheet Portal

Set the user-defined list for each user defined field on timesheet entries by entering a label and selecting from the drop-down lists for Misc 1-4. You can choose to hide or display the miscellaneous fields.

The following steps explain how the setting **Show User Defined Fields on Timesheet Summary** affects the Timecard pop-in and the Timecard Entries pop-in in the other Shop Activity portals.

1. In the Portal-wide Options section, check the **Show User Defined Fields on Timesheet Summary** checkbox to show user-defined fields on the Timesheet Summary.

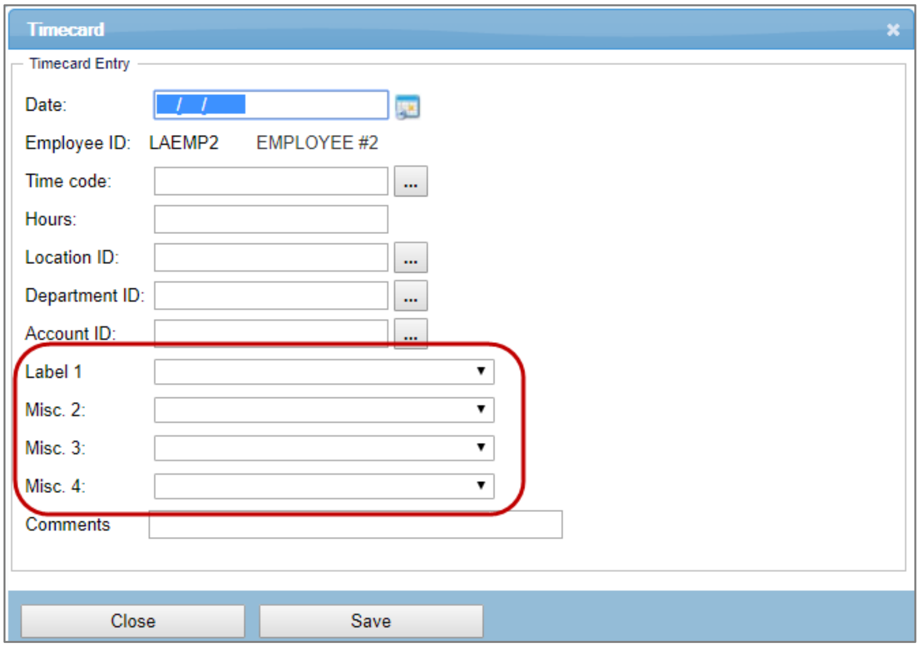
2. Check the box for each column you want to display, and select the desired lists for the Misc (1-4) columns from the drop-down lists.



3. For each column you check to show, enter a label for that column. If no label is entered, the column displays with the default **Misc (1-4)**.

4. When you are finished setting the default values and settings, click **Save**.

5. The user-defined fields are displayed on the Timecard pop-in and the Timecard Entries pop-in in the other Shop Activity portals.



6. After you configure the Timesheet portal, exit your browser and open a new browser window prior to using the Timesheet portal tab to view or update data.

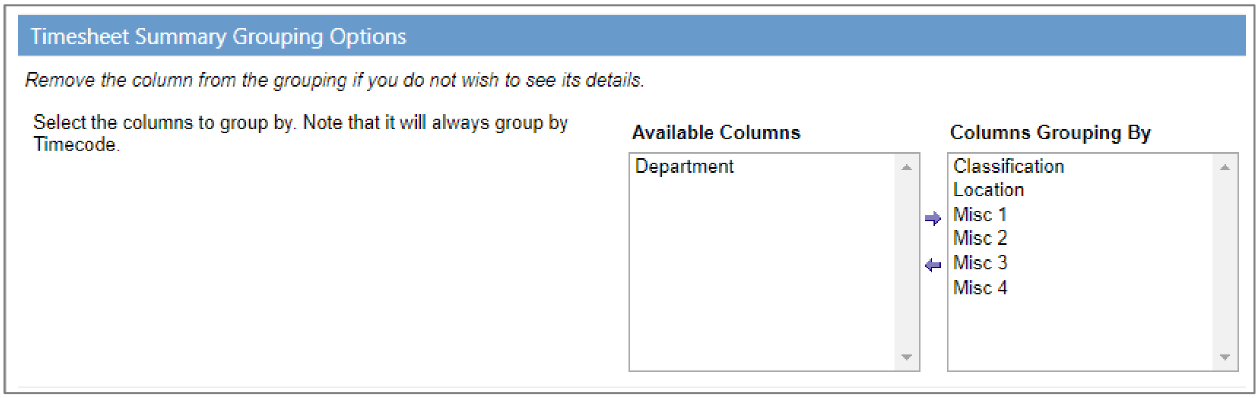
For additional information about the Timesheet portal, please refer to the *Shop Activity Timesheet Portal User Guide*.

Timesheet Summary Grouping Options

Use the Timesheet Summary Grouping columns to choose how to allow grouping in the timesheet summary table. Move columns to the right or left to hide or show for grouping in the table.

The columns are as follows:

- **Available Columns:** The available columns for the summary table.
- **Columns Grouping By:** The columns that will be displayed and available for grouping and sorting in the summary table. Available options are as follows: Department, Classification, Location, Misc 1, Misc 2, Misc 3, and Misc 4.


Timesheet Summary Grouping Options
Remove the column from the grouping if you do not wish to see its details.
Select the columns to group by. Note that it will always group by Timecode.
Available Columns
Department
Columns Grouping By
Classification
Location
Misc 1
Misc 2
Misc 3
Misc 4