Version 25 | Trapeze Enterprise Asset Management

Shop Activity – Timesheets

User 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 - User 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 can not 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. Understanding the Timesheet Portal

The timesheet Portal is best understood as a summary overview with its own set of Timesheet data generated upon employee clock in and clock out. The Timesheet Portal is intended to be viewed and used by three different kinds of users:

- Timekeeper
- Supervisor
- Technician

A brief overview of how various users access and use the portal is provided below and detailed information and instructions on how to use the portal are outlined in the subsequent sections.

Timekeepers may setup the Timesheet Portal as a traditional portal by adding it as a tab through the Admin Center as mentioned above in [Add Shop Activity Timesheet Portal Tab to Web Modules](). Timekeepers have full access to any and all timesheets.

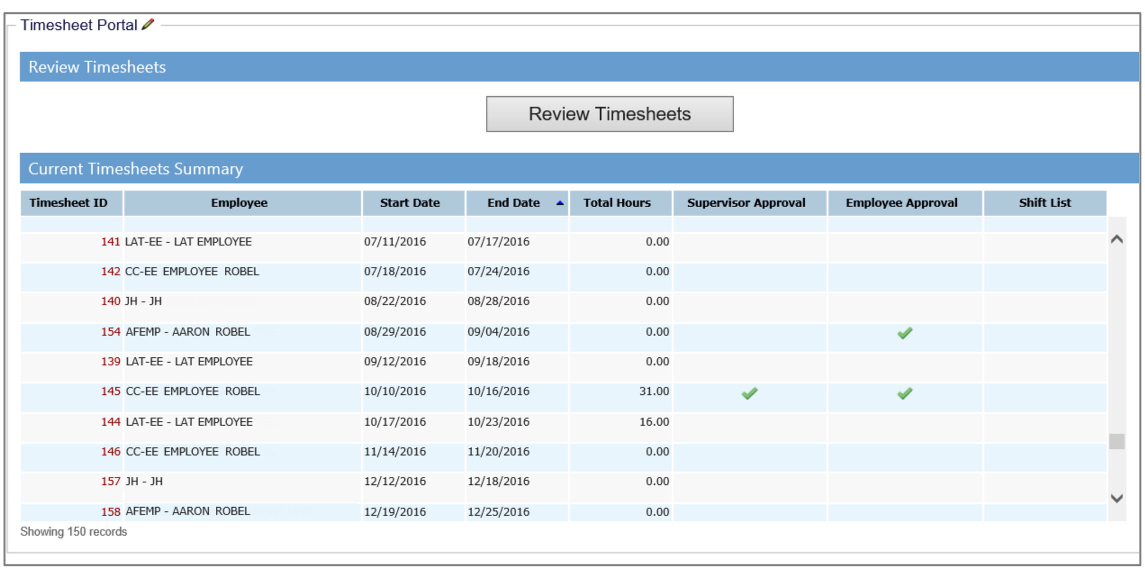
Timesheet Users

The following sections describe the users of the Timesheet portal, and how to access the portal from each user's available portals.

⚠ All users must have an associated employee ID assigned to access the Timesheet portal.

Timekeepers

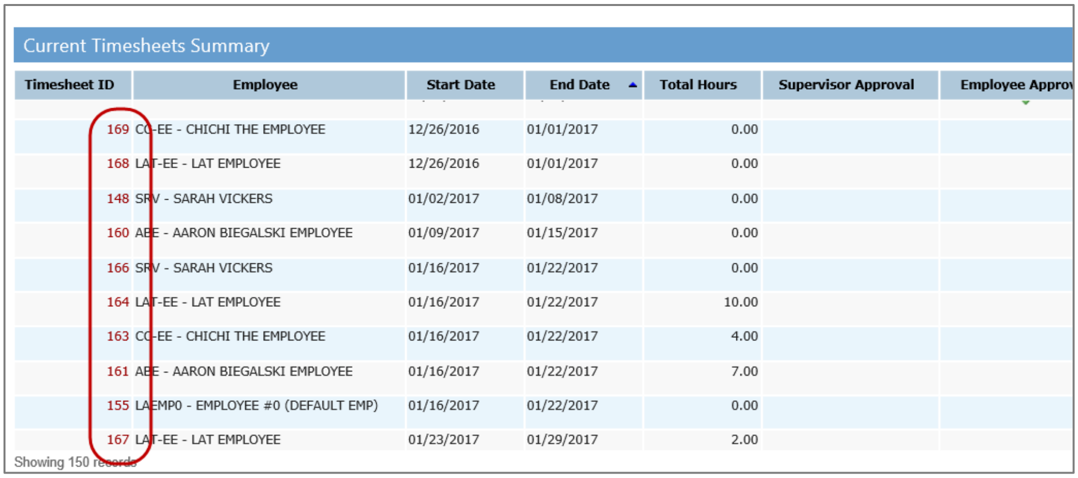
1. On the main Timesheet Portal page, scroll through the list to view all open timesheets. Information fields include Timesheet ID, Employee, Start Date, End Date, Total Hours, Supervisor Approval, Employee Approval, and Shift List.



Timesheet ID	Employee	Start Date	End Date	Total Hours	Supervisor Approval	Employee Approval	Shift List
141	LAT-EE - LAT EMPLOYEE	07/11/2016	07/17/2016	0.00			
142	CC-EE EMPLOYEE ROBEL	07/18/2016	07/24/2016	0.00			
140	JH - JH	08/22/2016	08/28/2016	0.00			
154	AFEMP - AARON ROBEL	08/29/2016	09/04/2016	0.00		✔	
139	LAT-EE - LAT EMPLOYEE	09/12/2016	09/18/2016	0.00			
145	CC-EE EMPLOYEE ROBEL	10/10/2016	10/16/2016	31.00	✔	✔	
144	LAT-EE - LAT EMPLOYEE	10/17/2016	10/23/2016	16.00			
146	CC-EE EMPLOYEE ROBEL	11/14/2016	11/20/2016	0.00			
157	JH - JH	12/12/2016	12/18/2016	0.00			
158	AFEMP - AARON ROBEL	12/19/2016	12/25/2016	0.00			

2. To view timesheets, do one of the following:

   - Click the red **Timesheet ID** column link to open the Timesheet Filter page to that timesheet.

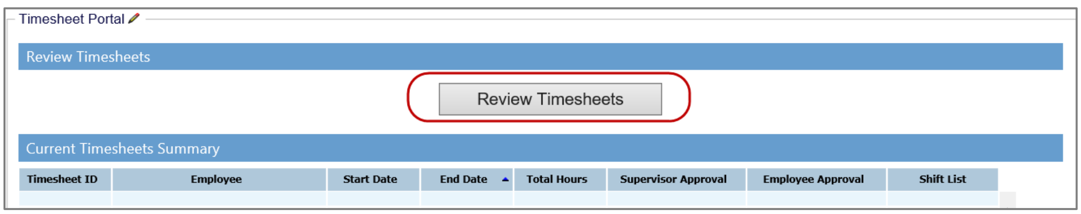


Current Timesheets Summary

Timesheet ID	Employee	Start Date	End Date	Total Hours	Supervisor Approval	Employee Approv
169	CC-EE - CHICHI THE EMPLOYEE	12/26/2016	01/01/2017	0.00		
168	LAT-EE - LAT EMPLOYEE	12/26/2016	01/01/2017	0.00		
148	SRV - SARAH VICKERS	01/02/2017	01/08/2017	0.00		
160	ABE - AARON BIEGALSKI EMPLOYEE	01/09/2017	01/15/2017	0.00		
166	SRV - SARAH VICKERS	01/16/2017	01/22/2017	0.00		
164	LAT-EE - LAT EMPLOYEE	01/16/2017	01/22/2017	10.00		
163	CC-EE - CHICHI THE EMPLOYEE	01/16/2017	01/22/2017	4.00		
161	ABE - AARON BIEGALSKI EMPLOYEE	01/16/2017	01/22/2017	7.00		
155	LAEMP0 - EMPLOYEE #0 (DEFAULT EMP)	01/16/2017	01/22/2017	0.00		
167	LAT-EE - LAT EMPLOYEE	01/23/2017	01/29/2017	2.00		

Showing 150 records

   - Click **Review Timesheets** to open the filter page.

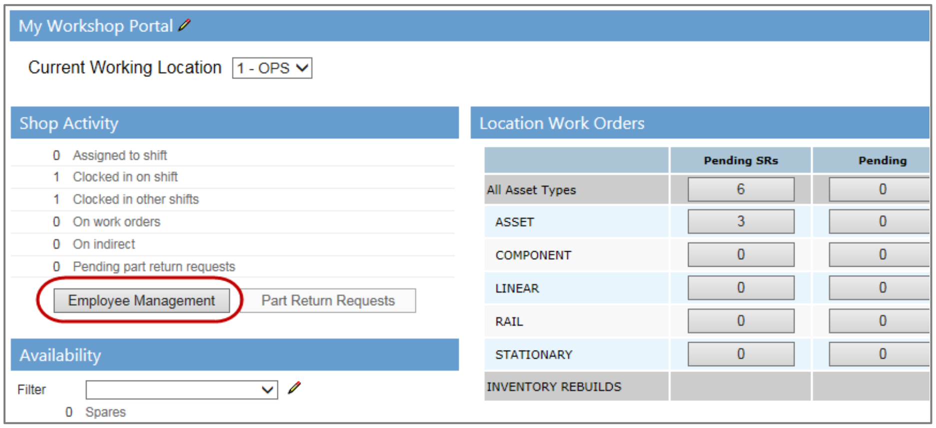


Supervisors

Supervisors may use the functionality of the Timesheet Portal through a page in Supervisor Portal. By accessing the Employee Management page, supervisors can review timesheets through the **Review Timesheet Summary** button. Supervisors may view and edit their direct employees' timesheets but they can only view their own timesheets.

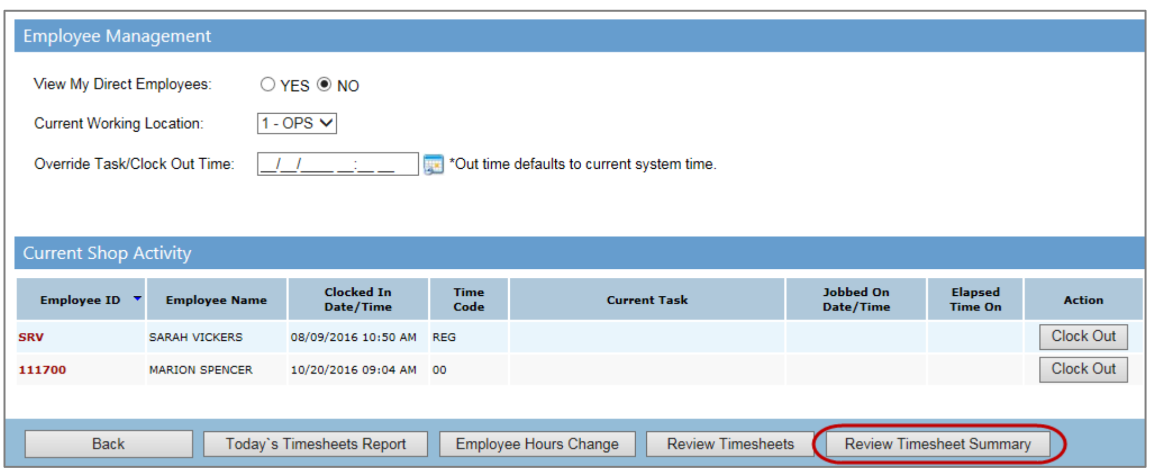
To access the Timesheet portal:

1. On the Supervisor Portal Main page, click **Employee Management**.

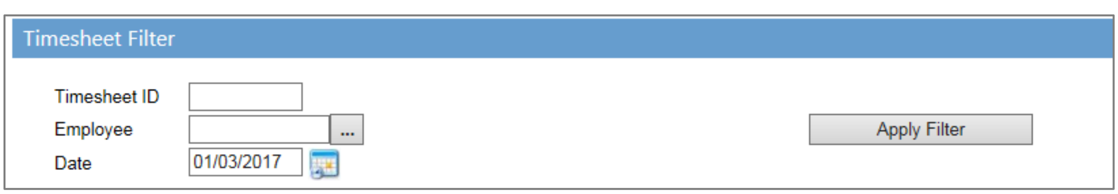


The Employee Management page displays.

2. Click **Review Timesheet Summary**.



The Timesheet Filter displays.

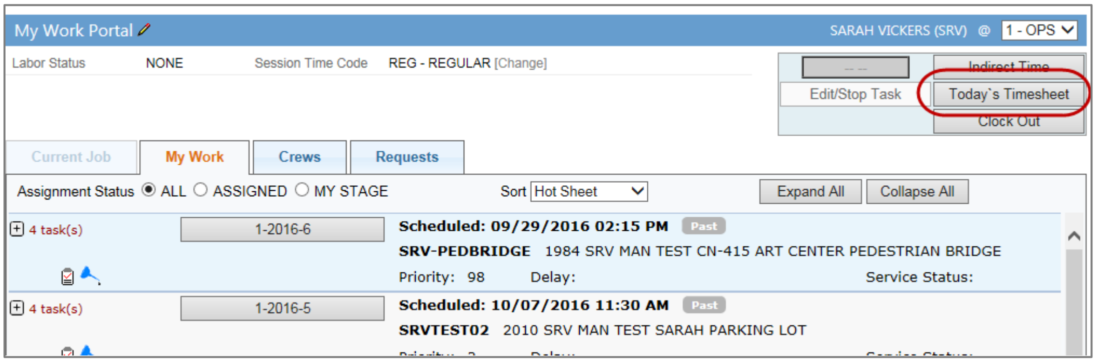


Technicians

Technicians may access the Timesheet Portal by clicking the **Today's Timesheet** button on the Technician Portal's main page. By accessing the View Timesheet page, they can review their timesheet through the **Review Timesheet Summary** button. Technicians can only view their own timesheet or add a time entry.

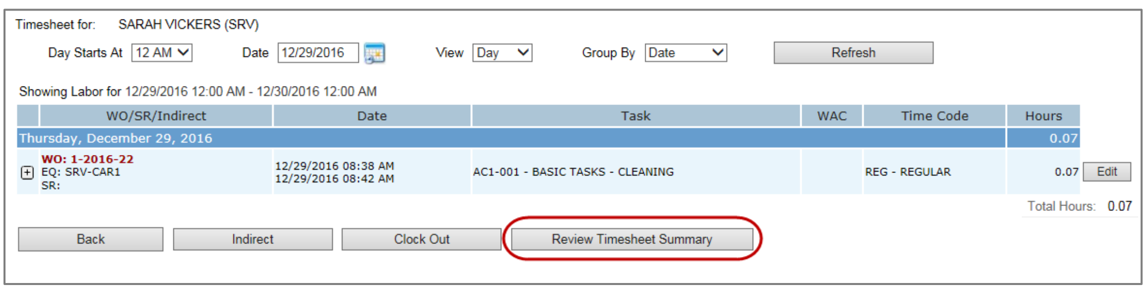
To access the Timesheet portal:

1. From the Technician portal main page, click **Today's Timesheet**.



The Timesheet page displays.

2. Timesheet page, click **Review Timesheet Summary**.



The Timesheet Filter page displays.

Filtering for Timesheets

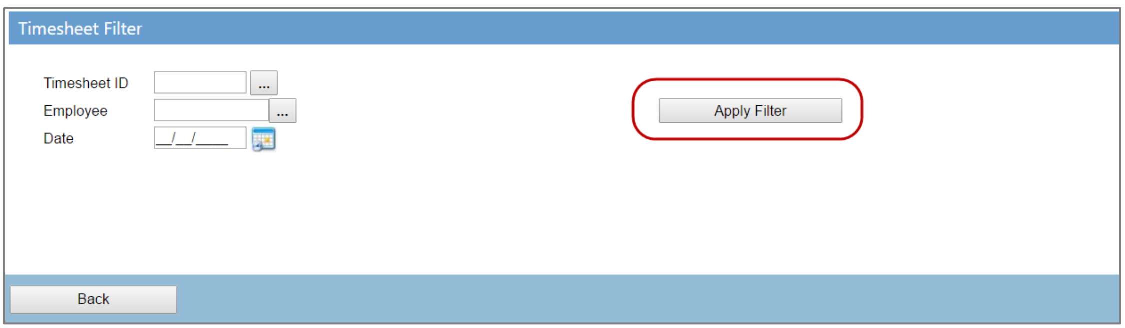
Use the below process to find a timesheet. Note that when you filter to a day that does not exist yet on a timesheet, Web Modules will automatically generate a timesheet. Some fields may vary depending on what type of user is accessing the timesheet.

To filter for a timesheet:

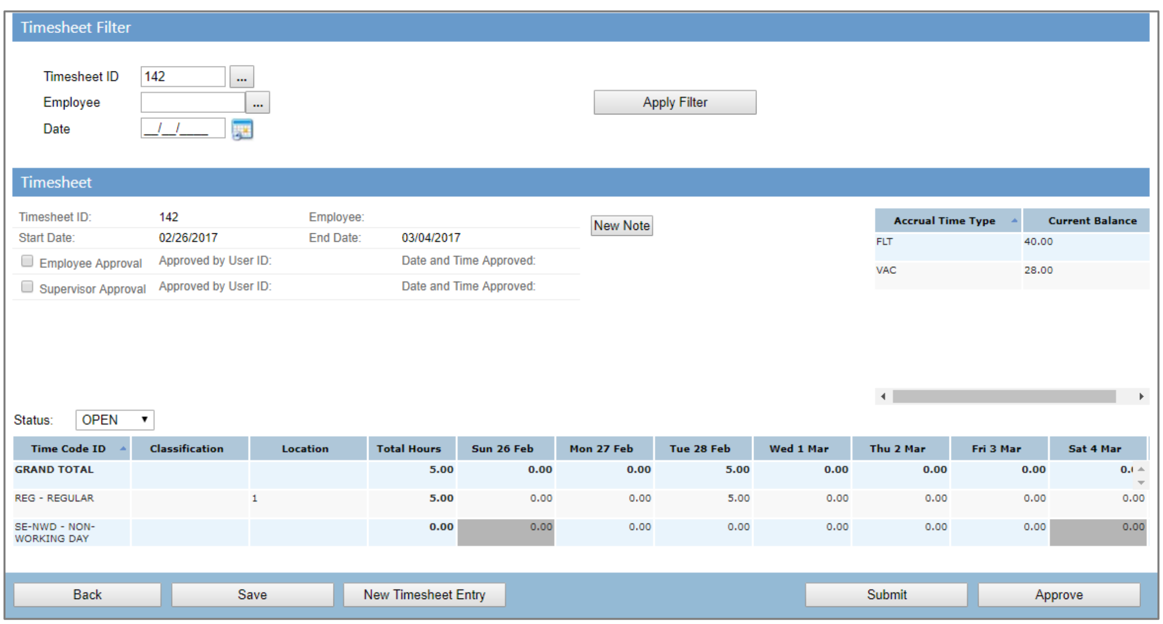
1. From the Timesheet Filter page, enter or select the **Timesheet ID**, **Employee**, and **Date**.

    - Type or use the **Employee** chooser button to enter an employee if a different employee is needed. The results for the employee search will display only employees at the locations available to the current logged-in user.

2. Click the **Apply Filter** button. If Timesheet ID is entered, the system will automatically display the designated Timesheet.



The resulting timesheet displays. Non-working and holiday days are displayed as 0 hours.



When generating a timesheet, the start date is 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 seven, then the start date will match the current date to always ensure the current date falls within the time sheet range.

Timesheets consist of the following columns: **Timecode**, **Location**, **Department**, **Total Hours**, columns for each day of the week, **Comments**, **Total Hours**, and any of the **Misc** columns that have been configured to display. The **Timecode**, **Location**, **Department**, and **Total Hours** fields are locked as the rest of the columns are scrollable along the right side of the table. Multiple rows with the same Timecode are possible, and each row is evaluated as unique by a combination of timecode, location, and department. The start and end dates are determined by what is entered for the field **Number of days in timesheet period,** on the Timekeeping tab of the Shop Activity – Setup - Options screen where days specified equal the number of columns.

Editing a Timesheet

Timekeepers and supervisors can edit the timesheet status and timecard entries on a timesheet.

Approving or Rejecting a Timesheet

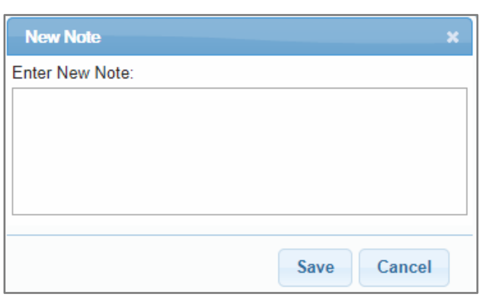
To approve a timesheet:

1. On the Timesheet Filter page, check either the **Employee Approval** or **Supervisor Approval** checkboxes.
2. Click **Save**.

To reject a timesheet:

1. On the Timesheet Filter page, uncheck the **Employee Approval** checkbox.

   The New Note pop-in displays.

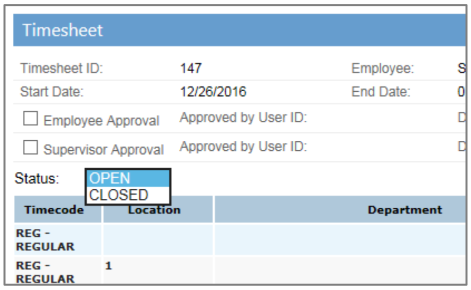
2. Enter a reason as to why you are rejecting the timesheet and click **Save**.

3. Click **Save**.

Timesheet Status

To edit a timesheet status:

1. Click the **Status** drop-down menu and select the status of the timesheet.



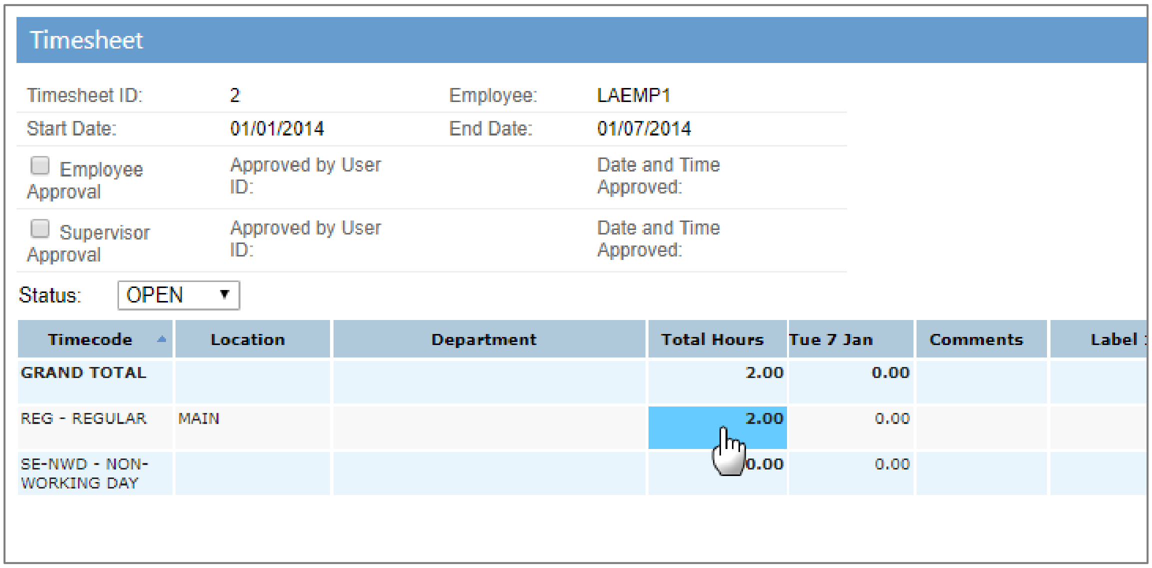
2. Click **Save** to update the timesheet's status. Closed timesheets may not be edited.

Timesheet Entries

The following example outlines how a timekeeper or supervisor may edit a timecard entry and create a new timecard entry.

To edit an entry:

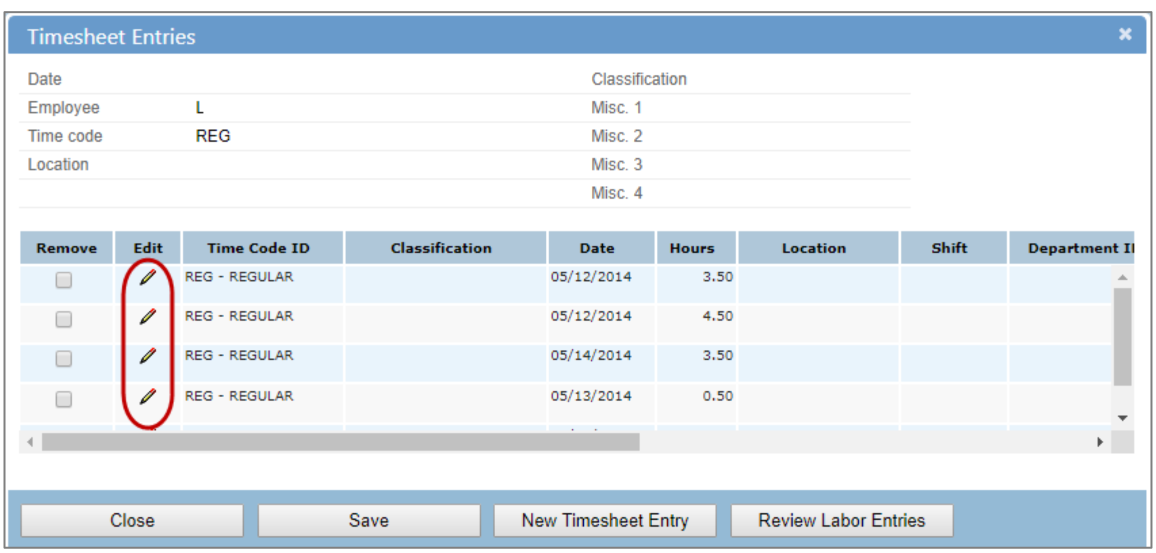
1. Click the number in the cell to edit that day's timesheet entry.



Note: Any change to the size of the timesheet columns will stay as set regardless of leaving the page or logging out.

The Timesheet Entries pop-in displays for the selected day.

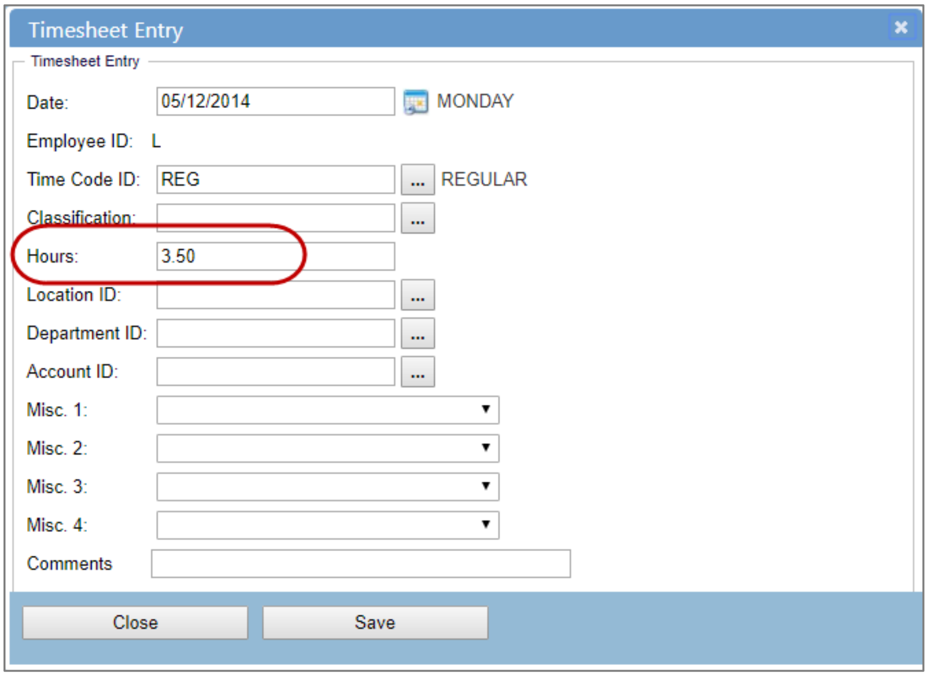
2. Click the Edit pencil to edit the entry.



The Timecard pop-in displays.

3. If you need to view other labor entries, click **Review Labor Entries** to open the Timesheet page (which filters to the week view for that time card). Clicking back from the Timesheets page returns to the Timesheet Filter page without the Timesheet Entries pop-in open.

4. Edit the entry as desired and click **Save**.



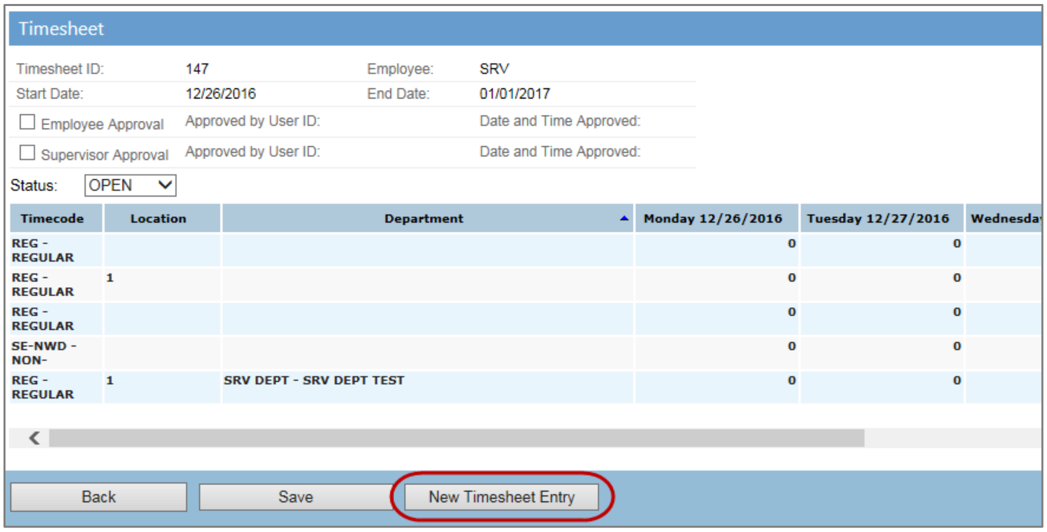
The Timesheet Entries pop-in shows the updated entry.

5. Click **Close** to finish the entry.

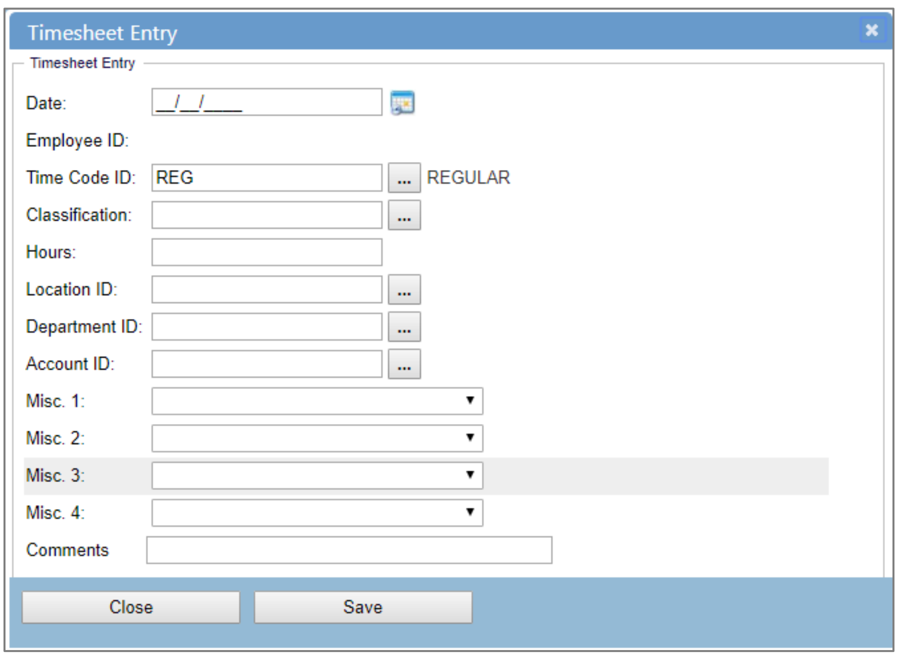
The Main Timesheet page displays the updated entry.

To create a new timesheet entry:

1. Click **New Timesheet Entry**.



The Timecard pop-in displays (for the date as selected previously in the filter).



2. Use the date picker to enter a **Date**. This is required.

3. Enter the hours to add to the entry.

4. Use the chooser buttons to enter **Time code** (required), **Location ID**, **Department ID**, and **Account ID** as needed.

5. Add a comment to the entry if needed.

6. Click **Save**.

   Successful Update *displays with a successful entry, otherwise an error displays if needed information is missing. The Timecard pop-in stays open in case another entry is required.*

7. After all entries are added, click **Close** to complete the entry.

8. When you are done with the timesheet, click **Save**.

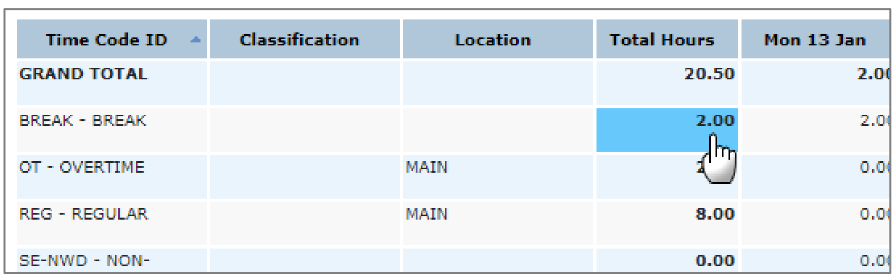
You may also update timesheets using the Timesheets screen and Timecard entries using the Timesheet Lines screen.

Removing a Timecard Entry

Timekeepers and Supervisors may delete a timecard entry if needed.

To delete an entry:

1. On the Timesheet, click the number in the cell to be removed.



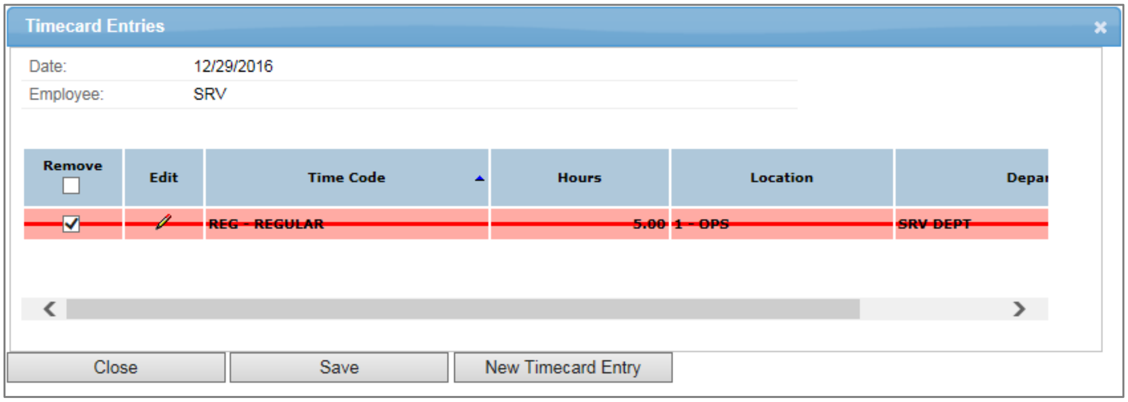
Time Code ID	Classification	Location	Total Hours	Mon 13 Jan
GRAND TOTAL			20.50	2.0
BREAK - BREAK			2.00	2.0
OT - OVERTIME		MAIN	[illegible]	0.0
REG - REGULAR		MAIN	8.00	0.0
SE-NWD - NON-			0.00	0.0

The Timecard entries pop-in displays.

2. Check the boxes you need in the **Remove** column.

   Note: Checking the box directly under the **Remove** Column's Title selects all the entries displayed for deletion.

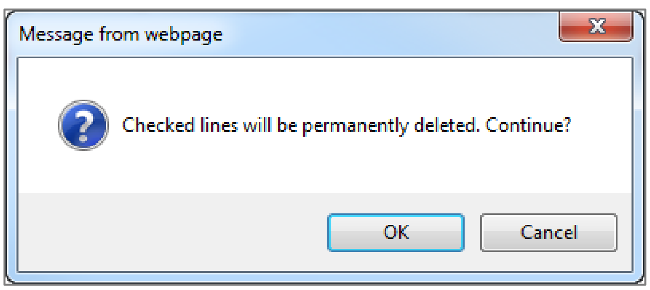
The entry shows a red line through the selected entries to indicate they will be deleted.



3. Click **Save**.

   A confirmation displays.

4. Click the **OK** button to permanently delete the checked lines.



The Timesheet displays without the lines, and total hours are adjusted accordingly.

Please contact Customer Support if you have additional questions.