Timesheet Help

Pacific TIMESHEET

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	• PIN • Smart Card • Fingerprint • Combination

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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 https://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	Allows you to specify whether rows and hours are carried forward from the previous timesheet when a new timesheet is created. Options include:		
	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		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. 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.
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	Your locale determines the following: • 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	The file format for exporting timesheet data, employee lists, etc. • 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.

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My Expense Sheets

The My Expenses – Expense Sheets page is where you enter expense items into your Expense Sheets. To navigate to expense sheets submitted within defined date ranges by selecting a time period in the Time Period pick list, or clicking the next/previous buttons when on the details page of any expense sheet. You can also select a start and finish date when searching for expense sheets.

An Expense Sheet has a status, which can be **Open**, **Submitted**, **Approved** or **Rejected**. The Open status means you can enter expense items and make other edits to your Expense Sheets. When you have finished filling out your Expense Sheets you should click the Submit button, which changes your Expense Sheets status to Submitted. Submitted Expense Sheets cannot be edited.

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

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

Expense Sheet Views

You can view your expense entries in an expense sheet which lists each expense in the expense sheet vertically. There is also a **Printable View** that can be found using the tools button which can be suitable for printing and signing by your manager if a hardcopy expense sheet is required.

Expense Sheet Rows

Expense entries are added by clicking the **Add Expense** button. You might be required to enter certain required fields such as client or project within the expense entry.

You can delete one or more rows at a time by checking the desired rows on your Expense Sheets and then clicking the minus or **Delete Row** button found on the far right of each expense entry row. You can also reorder expense entries by clicking the handles on the far left of each row and dragging it into a different position on the expense sheet.

Choosing Tasks

Your Expense Sheets 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.

Expense Sheet Summary Fields

Expense Sheet: Employee Name

Each expense sheet will have a link to the employee's mini-profile that contains key setup information about that employee.

Sheet Description

The **Sheet Description** field, a required field, is entered at the top of the Expense Sheet, allows you to provide a useful description for the expense sheet that will distinguish it from other expense sheets.

Total Reimbursement

The **Total Reimbursement** field is a required field when multicurrency is enabled. Below the Total Reimbursement heading is a total reimbursement value. This value is link with the format of CURRENCY value. For example, $1,500.00 in Canadian Dollars will appear as CAD1,500.00. You can select a different reimbursement currency by clicking on this link and selecting a different currency from the currency pick list. This list of currencies is managed by your system administrator. If a reimbursement currency, that you need, is missing, contact your system administrator for help.

Notes

The **Notes** field is where you complete a detailed note for approvers regarding the expense sheet.

ID

The **ID** field is a read-only system-generated unique expense sheet ID used to track your expense sheet from creation through to final approval.

Sheet Status

The **Sheet Status** shows the current state of the expense sheet. If the expense is unsubmitted, an unlocked icon will appear next to Unsubmitted. When the expense is submitted there will be locked icon next to Submitted. As managers with different approval levels approve the expense sheet, check marks will appear to the right of the lock icon.

Expense Sheet Row Fields

Row Number (#)

The **Row Number** column indicates the row number for each entry. Approvers can refer specifically to these row numbers when rejecting expense sheets.

Date

The **Date** field, a required field, refers to the date during which the expense was incurred.

Sheet

The **Sheet** field, a required field, refers to the date during which the expense was incurred.

Expense

The **Expense** field, which is a required field, is a pick list where you select the expense type for the expense entry. The expense lookup dialog allows you to search by typing in a search box which will automatically return matching expense types by name, ID or description. Expense types will be memorized in your expense field pick list for future use.

Description

The **Description** field is to provide a detailed description of the expense entry.

Quantity

The **Quantity** field is meant for expense types, such as miles, that require a quantity value. For miles expense type, a set unit amount will calculate the total amount as follows: Quantity X Unit Amount = Amount. Where the quantity is empty, the system will assume a quantity of 1.0, and will allow you to enter and save the full amount in the Amount field.

Unit Amount

The **Unit Amount** field is meant for expense types, such as miles, that require a unit amount value that is multiplied times a quantity value. The unit amount is set in the expense type profile under unit amount.

Expense Item Currency

The **Expense Item Currency** field is selected from a pick list of currency values. The expense item currency value will be used to convert the expense item amount to the reimbursement currency amount.

Amount

The **Amount** field is the amount of the expense entry. The amount is entered in the expense currency.

Receipt Image

The **Receipt Image** allows you to attach an image of the receipt for the expense entry.

Reimbursable

The **reimbursable** field is a check box that flags the expense entry as reimbursable.

Payment Method

The **Payment Method** field is a pick list of payment method values such as "Out-of-Pocket," Visa or American Express.

ID

The **ID** field is a read-only system-generated unique expense entry ID used to track your expense entry.

Reimburse Amount

The **Reimburse Amount** field shows the system-calculated reimbursement amount for this expense entry. You can override this amount by selecting the Override check box.

Exchange Rate

The **Exchange Rate** field shows the system-calculated exchange rate for this expense entry. You can override this amount by selecting the Override check box.

Billable

The **Billable** field is check box that flags an expense entry as billable.

Other Expense Sheet Commands

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

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

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

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 Expense Sheets has not been submitted and the day has no expense items. 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 Expense Sheets will delete the current Expense Sheets. This command is only available if the current Expense Sheets has not been submitted.

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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 > System 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).

Blank Rows	If you have one or more asset types enabled for this crew timesheet template then you can specify whether a blank row is shown for each employee in the crew if no data has been entered. For instance, a Materials tab might not associate entries with employees and would not want a blank row for each employee. However, an Equipment tab might want a row for each employee in the crew as equipment usage would be associated with a crew member.
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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Crew Dashboard

The Crew Dashboard page gives you a summary of the status of all crews (groups) you are permitted to access, showing such information as the number of hours entered for each crew, along with their submission and approval status. You can select a **Day** view or a **Week** view, and any time period. You can also filter the dashboard to only show crews with particular names or IDs by clicking on the **Filter** button (note that if you have additional text custom fields defined for groups those will show in the filter dialog, too).

Each row on the dashboard shows configurable (see below) status information, along with the ability to click on the row and jump directly to the crew timesheet data entry page.

Note: If you jump to a crew timesheet (by clicking a crew's hours or status on the dashboard) and make changes to the crew, then click back to the dashboard, you may need to refresh the dashboard in order for the changes to be shown. This can be done either by the **Tools > Refresh** link or the **Refresh** button on the right of each dashboard row (preferred, as this updates just the one row).

Crew Dashboard Options

Clicking the **Options** link under the **Tools** menu allows you to control the following properties of the dashboard (some of these settings are only available to system administrators, as noted in the descriptions below):

Property	Description
Week Start	You can select which day of the week is considered the first day, e.g. Monday. This is used for the Week View only. This property only applies to your account - it will not affect other users accessing the dashboard.
Search Results	You can adjust the maximum number of crews/rows to display on one page of the dashboard. This property only applies to your account - it will not affect other users accessing the dashboard.
Crew Fields	You can specify which crew/group fields are displayed in the dashboard. For example, you may want to show the **ID** of the crew along with its name. Any text custom fields created for groups will also be available to show. This is a global setting and affects all users who access the dashboard. As such, this property is only available to administrators. There are 2 special fields that bear describing. The **Manager/Approver** field will provide a popup link on the dashboard that shows the list of users that are assigned as editors/approvers for each crew. This is useful if you need to contact someone regarding the status of a crew's time entry. The **Employees** field gives a count of the number of employees assigned to the crew. As crew membership changes over time, it will take into account the actual employees with time when showing past timesheets.
Hours Format	You can specify the type of hours that are displayed on the dashboard. For instance, you may want to break out leave hours from work hours, thus you would choose "Work Hours / Leave Hours". This is a global setting and affects all users who access the dashboard. As such, this property is only available to administrators.

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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.

Note that only submitted (locked) timesheets can be marked as exported.

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.

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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.

Administrators (or anyone with "Can Approve All" timesheet permission) can view and approve all timesheets. Managers with limited permissions ("Can Approve Limited" timesheet permission) will have a restricted list where they can only see timesheets for 1) employees that they are a primary or backup approver for, or 2) employees in groups they are assigned to with a permission level that allows timesheet approval.

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 mulitple 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.

> Note that only submitted (locked) timesheets can be marked as exported.

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 by project rather than by timesheet. 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 > Approval Levels page**. On each approval level check the "Project" checkbox if that level is applicable for project approval in your organization. If at least one "Project" checkbox is checked then you will be able to access the **Approvals > Project Time Approvals page**.

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: • 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.

Leave Request Permissions

There are several leave request permissions (configured from the System > Security page):

Permission	Description
Can create my leave requests	Employees with this permission enabled (meaning they have this permission enabled for the permission level in their employee profile) will be able to create new leave requests for pay codes they are allowed to access (based on their pay code 'Can view' permission). They will also be able to delete leave requests they created as long as they have not been marked as approved. To delete an approved leave request it must first be unapproved by an approver.
Manage	Employees with this permission (meaning they have this permission enabled for the permission level in their employee profile) can manage all or a limited subset of the employee leave requests. If set to limited then the employee (or an employee group they are in) must be assigned to individual employee groups for which you wish them to manage leave requests. Enabling this permission for an employee means they will have access to the 'Leave Requests' tab of the application. Note that Leave Requests do not have any sub-permissions for Manage, unlike many other objects in the system. The 'Can manage' permission effectively gives the user the ability to view leave requests in a read-only format on the Leave Requests tab. You might use this permission if you want to allow some employees to see leave requests for planning purposes, but prefer other employees approve/reject the requests.
Approve	Employees with this permission (meaning they have this permission enabled for the permission level in their employee profile) can approve all or a limited subset of the employee leave requests. If set to limited then the employee (or an employee group they are in) must be assigned to individual employee groups for which you wish them to approve leave requests. Enabling this permission for an employee means they will have access to the 'Leave Requests' tab of the application.

Can create for approvees	Employees with this permission enabled (meaning they have this permission enabled for the permission level in their employee profile) will be able to create (and delete) leave requests for employees. The list of employees they can do this for depends on their 'Can approve' leave request permission, as well as whether they are assigned as approvers to any employees in their employee profiles. Note that this permission requires the 'Can approve' permission be enabled as a pre-requisite.

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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 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 Projects > 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	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, from the very earliest date. This value is updated every 15 minutes, but you can click the "Refresh" button to update the value immediately. Note that this value can be potentially time consuming to compute, so it is only computed if a non-blank **Planned Work** value is specified. You can, however, enter a zero for **Planned Work** if you don't know the actual value, in order to get the **Actual Work** to be computed. Administrators can configure the units (days or hours) from the System > General > Project Options page: see the Project Options help topic for more information.
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 page lets you configure global project settings, such as whether project work is displayed in units of hours or days, etc.

> Note: Project options are global settings that will affect all users. Only administrators will have access to the Project Options page.

> Note: The terminology of projects, tasks and other objects can be changed via the System > General > Terminology page.

The following project options can be configured:

Property	Description
Default Work Units	This setting determines whether planned and actual work for projects, etc. is entered/displayed in hours or days. Data internally is stored in hours, so when Day is chosen for work units the value will be computed by dividing the hours by the default hours per day, as configured on the System > General page.
Automatic Inactivation	If enabled then projects and tasks 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. The appropriate number of days after the last day for inactivating the item will depend on your requirements. Typically a value of 7 days is used in order to give employees enough time to add the item to their timesheet, especially if they save their time some days after the actual date of the work. Note that if no Actual Finish Date value is specified then the project or task cannot be inactivated automatically.
Required Fields	You can specify which fields are required when adding or editing projects. By default the project name is required, but for your use you may need additional fields marked as required, such as the project ID.

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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 phases) 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. The system will also automatically update the actual hours for dashboard items every night - if you need to update the dashboard immediately you can click the Refresh link, too.

You can configure the planned start dates and planned work for each task in the dashboard by clicking the Edit button, or by clicking the task name link in each row of the dashboard 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 nightly. Clicking the "Refresh" link will update the statistics immediately.

The following project dashboard columns can be displayed:

Column	Description
Position	The position of each task in the list, starting from 1.
Task Group	The Task Group or Phase level of the work-breakdown-structure (WBS), if enabled. Note that Task Group can be renamed when configuring the WBS on the System > General page.
Task	The Task level of the work-breakdown-structure (WBS), if enabled. Note that Task can be renamed when configuring the WBS on the System > General page.
Status	The task status, such as "In Progress", etc. This list can be configured by clicking the Edit button on any project dashboard, then clicking the "Options" link in the lower-right corner.
Planned Start Date	The planned or estimated start date for the phase or task.
Planned Finish Date	The planned or estimated finish date for the phase or task.
Planned Work	The planned or estimated work for the phase or task, in hours or days. You can specify whether the units are hours or days from the Project Options page.
Actual Start Date	The actual start date for the phase or task.
Actual Finish Date	The actual finish date for the phase or task.
Actual Work	The actual start work recorded for the phase or task. This value is updated automatically by the system every night (or you can update it immediately from the dashboard by clicking the Refresh link).
Percent Complete	This value is computed by the system. If planned work is specified and non-zero then the percent complete will be: 100 * (actual work) / (planned work)

Notes	User-entered notes for this task entry in the dashboard.

To configure which of these columns are displayed click the Options link on the Edit Dashboard page to view the Project Dashboard Options page.

Project Dashboard Options

When editing the project dashboard, you can click the Options link in the lower right corner to go to the Project Dashboard Options page. This page lets you configure global project dashboard settings, such as the list of task states, etc.

Note: Project dashboard options are global settings that will affect all users. Only administrators will have access to the Project Dashboard Options page.

The following dashboard options can be configured:

Property	Description
List Columns	Choose which columns to display in the dashboard. You can specify the order of the columns by dragging and dropping the column names.
Task States	This setting lets you control the list of task states, such as "In Progress", "Completed", etc. as suits your organizational needs. Task states are used on the Project Dashboard to track the status of the tasks needed to complete a project.

Importing/Exporting Dashboards

You can use the tools menu on the project dashboard to import or export the dashboard configuration. See the **Project Dashboard CSV Format** topic for more information.

Refreshing Dashboards

You can use the tools menu to 'refresh' the actual hours recorded against each project dashboard item. The system automatically updates these values nightly, but you can use the tools menu refresh option to get the most recent value in cases where users are actively entering data.

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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 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	The actual task start date. This property is only available if projects are disabled (see the Work Breakdown Structure topic for more information). 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 task finish or end date. This property is only available if projects are disabled (see the Work Breakdown Structure topic for more information). 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 task be inactivated automatically a specified number of days afterwards. See the Project Options help topic for more information.

Actual Work	The actual total number of days or hours spent on this task. This value is computed by totalling all hours recorded against this task on employee timesheets. This value is updated every 15 minutes. Note that as this value can be potentially time consuming to compute, it is only computed if a non-blank **Planned Work** value is specified. You can, however, enter a zero for **Planned Work** if you don't know the actual value, in order to get the **Actual Work** to be computed. Administrators can configure the units (days or hours) from the System > General > Project Options page: see the Project Options help 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.
Entry ID	A unique ID for identifying this entry. If the field is not entered by the employee than a value is automatically generated. You can control the formatting of this by editing the ID format on the Asset Types page. See the Asset Types topic for more information.
Asset	The asset associated with this entry. The selected asset will determine: • 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. To learn more about setting up assets refer to the Assets topic.
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	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, if specified. Note that you can optionally allow this value to be overridden if you make this field editable (see the Asset Entry Fields topic for more information).

Cost	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 bill amount, which is what you charge for this asset. Note that you can optionally allow this value to be 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.
Unit Bill Amount	The unit bill amount or rate for the asset used by this entry. Bill amount 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 bill amount of the selected asset. Note that you can optionally allow this value to be overridden if you make this field editable (see the Asset Entry Fields topic for more information). Note that both Unit Bill Amount and Bill Amount will be automatically set to zero if the Billable checkbox is present and not checked.
Bill Amount	The total bill amount for this entry, computed as the quantity times the unit bill amount. Bill amount is what you charge for this asset, as opposed to cost, which is what you pay for this asset. Note that you can optionally allow this value to be 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 bill amount will be computed for the entry as the total bill amount divided by the quantity. Note that both Unit Bill Amount and Bill Amount will be automatically set to zero if the Billable checkbox is present and not checked.
Billable	A checkbox field that indicates whether this asset entry is billable or not. If the asset entry is not billable then the Unit Bill Amount and Bill Amount values will be automatically set to zero.
Reimbursable	A checkbox field that indicates whether the employee associated with this asset entry should be reimbursed for the cost.
Notes	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.
Employee	The employee to associate with this entry. By default it is set to the employee who created the entry. Note that you can optionally allow this value to be overridden if you make this field editable (see the Asset Entry Fields topic for more information).

Reporting Group	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. Note that you can optionally allow this value to be overridden if you make this field editable (see the Asset Entry Fields topic for more information).
Customer/Project/Task	You can enter a value for the work breakdown structure (WBS) for this entry. For more information on see the Work Breakdown Structure topic. 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).
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 enabled 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.

Special Field Properties

Some fields have additional properties that can edited:

Field	Description

Entry ID	This field is an auto-generated sequential number. Each time an entry is created the value will be incremented. The default format is as follows: {0000000000} This results in a 10 digit number padded with leading zeros. For a number with no leading zeros the format is: {0} -> 176268 You can prepend or append characters to the format, too, such as: EQ{00000000} Note that the Entry ID field can be manually entered, too, by setting the field access to editable. To turn off the generation of the sequential number enter the following format: {}

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.

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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 form 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 form more information).
Units Decimal Digits	The number of decimal digits of precision for entering the quantity value for asset entries. It will default to the "Default Decimal Digits" property for the selected unit of measure, but you can override this.

Unit Amount	The unit amount or cost of this asset, per unit of measure. Amount is what you pay for this asset, as opposed to the bill amount, which is what you charge clients or customers for this asset. Unit Amount is used to compute the total amount based on the quantity entered by the employee. The unit amount is only useful if you have the employee enter the quantity. If multi-currency is enabled for the asset type then you can also select the default currency for this asset. Unit amounts can be editable by employees, or fixed (for example, you may have a Mileage item that has a fixed rate of 0.55 per mile and you do not want the employee to change that rate). You can also control whether the unit amount is editable (as well as total amount) by setting the entry field permissions (see the Asset Entry Fields topic for more information).
Unit Bill Amount	The unit bill amount or rate for this asset, per unit of measure. Bill amount is what you charge for this asset, as opposed to cost, which is what you pay for this asset. Unit bill amount is used to compute the total bill amount based on the quantity entered by the employee. The unit bill amount is only useful if you have the employee enter the quantity. Unit bill amount can be either a fixed value, or can be computed. The following options are available: <table><tr><td>Fixed Amount</td><td>The unit price is always the value entered: it does not change based on the unit cost.</td></tr><tr><td>Markup</td><td>The unit bill amount is computed from the unit cost as a percent markup: Unit Bill Amount = Unit Cost * (1 + Markup) For example, if the markup is 50% and the unit cost is $10.00, then the unit bill amount will be $15.00.</td></tr><tr><td>Margin</td><td>The unit bill amount is computed from the unit cost to give you a percent margin: Unit Bill Amount = Unit Cost / (1 - Margin) For example, if the margin is 50% and the unit cost is $10.00, then the unit bill amount will be $20.00. As you can see from the equation, the margin can never be 100% or greater.</td></tr></table> Note that you can optionally allow entries to override this unit bill amount if you allow the entry's Unit Bill Amount or Total Bill Amount fields to be editable (see the Asset Entry Fields topic for more information).
Notes	Notes about this asset, up to 2000 characters.

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Asset Classes

Asset classes allow you to organize your assets into logical groupings. For example, given an asset type of Equipment you might created 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.

Asset types have the following advanced properties:

Property	Description
Auto-generate Asset Entry ID	If enabled then unique asset entry IDs will be automatically generated whenever an entry is created. By default the ID format will be a sequential number padded out to 10 digits with leading zeros. You can alter the ID format to suit your needs (for example, to more easily integrate with external systems). Example formats are: {0} -> A sequential number with no leading zeros (meaning the length will increase as the sequential number increases). For example '1234'. {00000000} -> A sequential number padded with leading zeros to be a length of 8 digits. For example '00001234'. {ABC-0000000} -> A sequential number padded with leading zeros to be 7 digits in length, with the prefix 'ABC-'. For example 'ABC-0001234'. Note that you should not make the number of zeros in the format too few or the sequential number will be truncated and you will not have a unique ID (IDs must be unique). You should consider a minimum of at least 7 zeros in the format.

Asset Sheet Enabled	If enabled then asset entries will be collected or grouped into asset sheets (for example, Expense Sheets). When employees want to record asset entries they will need to edit or create an asset sheet first, and asset entries will be added to the asset sheet. This is convenient for grouping related entries into a logical unit, such as expenses incurred on a business trip.
Auto-generate Asset Sheet ID	If enabled then unique asset sheet IDs will be automatically generated whenever an entry sheet is created. The format is the same as described above for auto-generated asset entry IDs.
Multi-Currency Enabled	If enabled then employees can pick the local currency for asset entry amounts. When employees create entries the amount they enter can be in Euros or Canadian Dollars, even when the base currency for the system is US Dollars (the base currency is configured on the System > General page).
	The list of currencies an employee is allowed to choose from is configured on the System > General > System Options page.
	With multi-currency enabled the entered local amounts will be converted to the base currency internally, and will be available for reporting or export/import. For instance, in addition to the Asset Entry.Amount field you will find additional fields: Asset Entry.Amount-Local (the amount as entered by the employee in the local currency) and Asset Entry.Amount-Currency (the local currency selected by the employee).
	Note that conversions between local currency amounts and the base currency for the system are handled automatically using currency exchange rates provided by reputable third party sources based on official central bank data. Currency exchange rates can be optionally overridden at the individual entry level if so desired.
	If multi-currency is not enabled then all amounts are considered to be in the base currency.

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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.

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Managing Expense Sheets

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

If the employee's permission level allows only limited expense sheet 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 expense sheet management permissions to create "expense keepers" - employees with the ability to enter expenses for other employees. This avoids the need to log in as another user in order to fill out their expense sheet. In implementing expense keepers it is recommended that you create a new Permission Level with only the minimum required expense sheet permissions such as manage, edit and create. The Permission Levels topic has more information.

Expense sheet Lookup

To list employee Expense Sheets click the **Expenses** tab, navigate to Expense Sheets, 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 Expense Sheets.

If you do not find any Expense Sheets then you may have only limited expense sheet 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 expense sheet. Depending upon your permission level, you may be able to edit or even delete this expense sheet.

Exporting Expense Sheets

If your permission level allows it you can export the list of Expense Sheets by clicking the tools button in the upper right of the list and then clicking the **Export List** link. This will export the expense sheet 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** link will download the expense entries for each expense sheet in the list as a file that you can save on your local computer. This is useful for exporting expense entries to external systems such as Payroll or Accounting applications. You can optionally mark expense entries as being exported, so that you can avoid re-exporting the same data.

Expense Entry Corrections
Once an expense sheet has been marked as exported it cannot be unsubmitted (unlocked) for re-editing. You will need to make corrections to the expense sheet by clicking on the tools button and then View Expenses in order to view and manage expense entries. You can search for any expense entries by setting the parameters of the expense entries in search.

These can include employee, date range, project, etc. You can view already-exported and processed expense entries and create correction expense entries as follows:

1. Click into the expense entry you intend to correct.
2. Clone the entry by clicking on the clone button.
3. Edit the cloned entry to create a negative entry. If the entry is a mileage entry, change the quantity entry to negative, or if the entry is an expense amount entry, change the amount value to negative.
4. Clone and edit the entry again and modify it to create the correct positive value of the correction entry.
5. Submit and approve the pair of correction entries so they are ready to exported and processed.

This is a safeguard to avoid modifying previously exported time entries.

Note that administrators (those with the "Can Manage All" expense sheet permission) can bypass this restriction and still unsubmit a previously exported expense sheet, if the need arises.

Another option for getting access to expense sheet data is to run a **Expense 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 Expense Sheet Data

If your permission level allows you to import expense data by clicking tools button in the upper right of the list and then clicking the **Import** link. The Importing/Exporting topic has more information generally on how import/export utilities work, including auto-import and auto-export features. Importing expense data has a few important features worth noting:

1. You can prepare and expense import data file to import credit card data directly into the system.
2. You should prepare this file to group expense entries to list entries by employee first and entry date second. You can have multiple groupings of expense entries grouped by employee then date.
3. When you import these expense entries each expense entry will be assigned an auto-generated Expense Sheet ID for each employee. The series of expense entries imported will be grouped into a unique expense sheet using this unique expense sheet ID.

Printing Expense Sheets

The 'Print List' option in tools menu in the upper right corner of the expense sheet list allows you to download a printable hard copy summary list report of all of the Expense Sheets in the list. You can also print out multiple Expense Sheets for signing, for instance, by clicking on the Print Expense Sheets button. Note that, rather than printing the entire list, you can print selected Expense Sheets by clicking the checkbox on each row before selecting the 'Print' option.

You can also print individual Expense Sheets by clicking into an individual expense sheet the time period link in the expense sheet list, then clicking the 'Print' view button in the upper-right corner of the expense sheet. This will download a printable version of the expense sheet suitable for printing.

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Expense Entries

Expense entries track the amount other important details of an expense item within an expense sheet or report. For example, you might have an expense entry of a meal (the expense type) that took place on Monday 3/28 (the date). You can control the specific fields that are entered recorded against each expense item by clicking the Options link under the More Menu (triangle button) in the upper-right corner of the Expense Sheets list.

> Note: You can enable sheet support on any asset type. See the Asset Types help topic for more information.

Expense entries can have the following entry fields:

Property	Description
Date	The date of the entry. This is the date the expense was used, for instance. This field is required.
Entry ID	A unique ID for identifying this entry. If the field is not entered by the employee then a value is automatically generated. You can control the formatting of this by editing the ID format on the Expense Types page. See the Asset Types topic for more information.
Expense Item	The expense item associated with this entry. The selected expense type will be used by users to record:
	• The amount that the expense costs. Where the expense item does not have a unit amount (unit cost) set in its profile, users are only required to enter the expense item amount, and not enter values for quantity or unit amount.
	• The quantity of the expense item and the unit of measure for a quantity field where the expense item requires recording the quantity, such as miles. The expense item can have a fixed unit amount, such as unit amount per mile for a mileage expense item. In this case, the amount will be a calculated value (quantity X unit amount = amount).
	• The number of digits to the right of the decimal point that can be entered for the quantity field.
	• The currency for an expense item unit amount can be set when multi-currency is enabled.
	• The unit amount can be set as a "fixed" or "editable by employee." This can be used when you might have multiple fixed rate expense items. In the case of a "Mileage USA," you could set the unit amount to a fixed rate of .54 USD. For "Mileage Canada" you could set the unit amount of a fixed rate of .56 CAD.
Quantity	Quantity is used for certain expense items that require capturing a quantity, such as the number of miles. You can setup multiple expense types for miles to reflect different reimbursement rates that will be multiplied times the quantity entered. For example, #Miles USA would be have a different unit amount (per mile) than #Miles UK.

Description	A description for this entry, up to 255 characters. For larger text input you can also use the Notes field.
Unit Amount	The unit amount (cost) of an expense entry.
Amount	The total amount of an expense entry (quantity X unit amount)
Currency	Currency is the selected by the employee to designate the currency of the expense amount where the cost was incurred. The currency can only be edited if multi-currency is enabled.
Billable	A checkbox field that indicates whether this expense entry is billable or not. If the expense entry is not billable then the Unit Bill Amount and Bill Amount values will be automatically set to zero.
Unit Bill Amount	The unit bill amount of an expense entry that will be used to calculate the bill amount billed to a customer.
Bill Amount	The total bill amount for this entry, computed as the quantity times the unit bill amount. Bill amount is what you charge for this expense, as opposed to amount(cost), which is what you pay for this expense. Note that you can optionally allow this value to be 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 bill amount will be computed for the entry as the total bill amount divided by the quantity. Note that both Unit Bill Amount and Bill Amount will be automatically set to zero if the Billable checkbox is present and not checked.
Reimbursable	A checkbox field that indicates whether the employee associated with this expense entry should be reimbursed for the cost. You need to have the Reimbursable field configured as an entry field in order to see the Total Reimbursement value of an expense sheet.
Reimbursement Amount	Reimbursement amount is the amount in the reimbursement currency that will be reimbursed to an employee in the reimbursement currency. The reimbursement amount can be overridden by an employee. The Reimbursement Amount field shows up automatically in the Entry Details dialog if the Reimbursable field is present.
Reimbursement Currency	Reimbursement currency is designated by the employee in the Expense Sheet and is used to convert an expense amount from and expense currency into a reimbursement currency. For example, an airfare expense that is incurred in USD (the expense currency) might be converted into CAD (the reimbursement currency). The Reimbursement Currency can only be edited if the Reimbursable field is present, and multi-currency is enabled.
Exchange Rate	The exchange rate that converts the expense amount into a reimbursement amount. Exchange rate can be overridden by an employee. The Exchange Rate field shows up automatically in the Entry Details dialog if the Reimbursable field is present, and multi-currency is enabled.

Notes	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.
Employee	The employee to associate with this entry. By default it is set to the employee who created the entry. Note that you can optionally allow this value to be overridden if you make this field editable (see the Asset Entry Fields topic for more information).
Reporting Group	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. Note that you can optionally allow this value to be overridden if you make this field editable (see the Asset Entry Fields topic for more information).
Customer/Project/Task	You can enter a value for the work breakdown structure (WBS) for this entry. For more information on see the Work Breakdown Structure topic. 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).
Custom Fields	You can have any number of custom fields that can be entered by the employee for an expense entry. To add new custom fields select Options on the More menu, and then Entry Fields: Configure Entry Fields (see the Custom Fields topic for more information).

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Multi-Currency

Multi-currency allows employees to enter expense entry amounts in the local currency.

Enabling Multi-Currency

To enable multi-currency for expenses, assets or other entry types, you need to do following:

1. Go to Admin>System>System Options and edit. Enable the currencies you want to use in your system from a currency picklist.

2. Go to the main enabled Expense/Asset page, navigate to the tools button, and click into and edit the Expense/Asset type for which you want to enable multi-currency. Next to the Multi-Currency Enabled heading, check "Yes - Allow users to choose currency for entered amounts."

How Multi-Currency Works

Once enabled, the system automatically fetches and records the exchange rates and amounts between:

-The original expense amount

-The reimbursement amount, and

-The system base currency amount.

In the following example recorded on June 21, 2016, the data for an airfare expense is recorded where the expense entry currency is CAD, the reimbursement currency is GBP, and the system's base currency is USD.

Currency Type	Description
Expense Local Currency	Expense Type = Airfare Expense Local Currency = USD Expense Amount = CAD547.00
Reimbursement Currency	Expense Type = Airfare Reimbursement Currency = GBP Reimbursement Currency Exchange Rate = 0.531140 Reimbursement Amount = GBP290.53
Base Currency	Expense Type = Airfare Base Currency = USD Base Currency Exchange Rate = 0.782920 CAD/USD Base Currency Amount = USD428.26

Once enabled, there will be several specific multi-currency fields that will be made available that will be used with other related fields in the system. The multi-currency fields are marked below with an asterisk (*).

Expense Item Currency*

The **Expense Item Currency** field will be enabled with a pick list of your enabled currency

values. Users will set the expense item currency value to the local currency where the expense was incurred. This currency value will then be used to convert the expense item amount to the reimbursement currency amount.

Reimburse Amount*

The **Reimburse Amount** field shows the system-calculated reimbursement amount for this expense entry. You can override this amount by selecting the Override check box. This field should be setup to appear in the details of the expense entry template.

Exchange Rate*

The **Exchange Rate** field shows the system-calculated exchange rate for this expense entry. You can override this amount by selecting the Override check box. This field should be setup to appear in the details of the expense entry template.

Expense Amount

The **Amount** field is the amount of the expense entry. This amount must always be paired with a selected expense currency for multi-currency purposes.

Reimbursable

The **reimbursable** field, which can be used in non-multi-currency mode, is a check box that flags the expense entry as reimbursable, and must be checked by the user to include an expense entry in the reimbursement amount.

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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	The employee login name. This is required, and must be a unique value up to 80 characters. The login name is NOT case-sensitive. 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.
Password	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. 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.
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	The employee status, either **Active**, **Inactive** or **Locked**. 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. 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.

First Day	The first day of employment. Specifying a value can be important for several reasons: - 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	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.
Last Login	This is a read-only field showing the date and time of the employee's last successful login.

Photograph	An optional employee photograph. Supported formats are PNG, GIF and JPG, and it is recommended the image be square and approximately 180x180 pixels. You can specify an image up to 500x500 pixels, but it will be scaled to 180x180 in web pages. Also, the file size must be no greater than 48K bytes. Note that setting the photograph results in a copy of it being stored in the application database, so you do not have to maintain the photograph in the same location that you used when uploading it.
	
	You can bulk set employee photographs by using an auto-import file. You can upload all of your employee photograph files to an FTP site, then send an employee CSV file with two columns as the following example shows:
	
	`Login Name,Photograph`
	`employee1,emp1-photo.jpg`
	`employee2,emp2-photo.jpg`
	`...`
	
	When the auto import directory is scanned and the CSV file is read, it will look for each photograph file in the same directory as the CSV file and set the user's photograph. You can optionally put the photographs in a subdirectory, e.g.
	
	`Login Name,Photograph`
	`employee1,photos/emp1-photo.jpg`
	`employee2,photos/emp2-photo.jpg`
	`...`
	
	When the CSV file is processed it will look for files in the "photos" subdirectory within the directory containing the CSV file.
	
	Alternatively, if you have an existing repository of photographs you can use URLs for the Photograph field values in the import file, e.g.
	
	`Login Name,Photograph`
	`employee1,http://xyz.com/images/photo1.jpg`
	`employee2,ftp://xyz.com/pub/foto2.gif`
	`...`
	
	Supported URL formats for the Photograph field in the import file are HTTP, HTTPS and FTP. Another advantage of using a URL is that you can manually import the file via the web interface, rather than using the auto-import directory. Note that setting the photograph results in a copy of it being stored in the application database, so you do not have to maintain the photograph in the same location that you used when importing it.

Permission Level	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. 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. For more information on permission levels see the Security help topic.
Employee Type	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 Employees > Employee Types page, available under the More menu on the Employees page.
Policy	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.
Job Title	The optional job title for this employee, up to 80 characters.
Reporting Group	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. 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.
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	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. 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.
Scheduled Work Days	The days of the week the employee is scheduled to work, for example Monday-Friday. Specifying a value can be important for several reasons: - 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.
Scheduled Hours	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: - 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.

Scheduled Start	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: - 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	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: - 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	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. 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.

Timesheet Memory	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.

The following timesheet memory options are available:

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.

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.

| Hours Format | The choice of how the employee enters hours, either decimal format (for example 7.50) or hours:minutes (for example 7:30).

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. |
|---|---|
| Locale | The locale is a geographic/language region that determines the following:
- 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.

Note: The application will always assume the employee is in this locale, rather than pick up the locale from the browser, for instance. |
| Time Zone | The employee's time zone. When timesheet data is saved it will be relative to this time zone.

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. |

Approver	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). 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. 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.
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
- Rate Options

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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.
Type	The group type allows you to control whether this groups shows up in lists or pickers on various parts of the application: • Permission groups are used to provide fine-grained control of application security. For instance, you might create a Timekeeper group that is composed of users who enter time for other employees. All groups are always permission groups, regardless of whether they are also used as reporting groups or crews. • Reporting groups are groups that are assigned to employees in their profile or properties page, and serve as the employee's current cost center or department (you can rename the term "reporting group" as appropriate for your organization from the System > General > Terminology page). The reporting group value is automatically recorded when an employee saves their time, making it easy to do departmental or cost center reporting and costing. Enabling the reporting group checkbox will allow the group to be selected on the employee properties page, as well as on the timesheet if the group field is configured for the timesheet template. • Crews are groups of employees that can have their time recorded for them by managers or timekeepers using the Crew Timesheet page. Enabling the crew checkbox will allow the group to be selected on the Crew Timesheet page (as well as the Crew Approval Kiosk).

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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Employee Options

The Employee Options page allows administrators to configure various employee settings, such as which fields are required to be entered when editing employees, etc.

> Note: Employee options are global settings that will affect all users. Only administrators will have access to the Employee Options page.

> Note: The terminology of employees, groups and other objects can be changed via the System > General > Terminology page.

Required Fields

You can specify which fields are required when adding or editing employees. By default fields such as login name, last name, etc. are required, but for your use you may need additional fields marked as required, such as the employee ID.

Employee Types

An Employee Type is an employee property that you define as a way to differentiate different categories of employees, for example "Exempt" and "Nonexempt", or "Salaried" and "Hourly". You can define any number of employee types. Employee types have the following properties:

Property	Description
Label	The display name of the employee type, up to 255 characters. For example, "Hourly". This is the text shown in the user interface, as well as in exported data.
Value	The internal value for the employee type, up to 255 characters. For example, "hourly". This is the text stored in the database and, therefore, shown on reports. Generally you will want to use the same value for Label and Value.

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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, most 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: • 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: • 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: • 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: • 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: • 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: • 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: • 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.
Create Custom Timesheet Summary Report	If the above timesheet summary reports do not group the data in the format you like you can create your own custom summary report. You can group by up to 5 different objects or factors, including custom fields.

Leave Reports

Report	Description
Employee Leave	This report summarizes employee leave hours.
Employee Leave Details	This report lists employee leave time entries in full detail.

Employee Reports

Report	Description
Balance Activity	This report summarizes changes to balances (sick, vacation, etc.) for each employee.
Balance Activity Details	This report lists details of each change to balances (sick, vacation, etc.) for each employee.
Employee Attendance	This report shows employee in/out times on a daily basis, as well as indicating if employees are in compliance with their scheduled in/out times. Any leave taken is also shown. See the Employee Attendance Report help topic for more information.

| Employee Details | This report lists details for each employee, such as email, phone numbers, etc. |
| Employee Pay Report | This report shows pay data, such as RT/OT etc. hours and pay amounts, using rates that depend on the type of hours. For example OT hours can be configured to have a pay rate 1.5 times the RT pay rate. This report is a variation of the Profit Report (see below), and for more information see the Profit Report topic. |

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.
System Even Log	This report lists information about system events such as sent emails, scheduled imports and exports, etc.

Other Reports

Report	Description
FTE Summary Report	This report summarizes full time equivalent (FTE) hours in a columnar format. For more information see the FTE Summary Report topic.
Hours Summary Report	This report summarizes timesheet hours in a columnar format. For more information see the Hours Summary Report (Columnar) topic.
Profit Report	This report summarizes profit/loss based on pay amounts and bill amounts. You can customize this report to break down the data by employee, project, group, etc. For more information see the Profit Report topic.

Report Properties

See the Report Properties help topic for information on standard report properties.

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.

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Standard Report Properties

When creating or editing reports you can set the following report properties (not all of the following properties apply to all reports):

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	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. Publishing a report does not allow others to edit it - only the employee who created the report can subsequently edit it.
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	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.
	In addition to specifying individual employees, you can also specify the following special employee filter values:

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.

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Employee Attendance Report

This report shows employee in/out times on a daily basis, as well as indicating if employees are in compliance with their scheduled in/out times. Any leave taken is also shown. Note that anyone running this report will only see employees they are permitted to report on based on their permissions.

When creating or editing this report you can set the following properties:

Property	Description
Name	The report name or title, up to 80 characters (required).
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	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. Publishing a report does not allow others to edit it - only the employee who created the report can subsequently edit it.
Reporting Period	The default time period for the report. The reporting period can be overridden when running the report. Note: Due to the columnar nature of the report your date range will be restricted to 31 days or less.
Report Columns	The list of employee properties to display as columns on the report. You can also show additional employee reporting group (or cost center/department depending on your terminology) properties that you may need to display.
Alerts	You can optionally have the report compare employee in/out times against scheduled times, and display discrepancies in color on the report.
Employee Type Filter	Use this filter to restrict the report to only employees of specific types, e.g. "Hourly" employees. This acts as a default filter - the filter can always be changed when running the report.
Employee Filter	Use this filter to restrict the report to only specific employees. This acts as a default filter - the filter can always be changed when running the report. Note that anyone running this report will only see employees they are permitted to report on based on their permissions.
Reporting Group Filter	Use this filter to restrict the report to only employees in specific reporting groups (or cost centers/departments depending on your terminology). This acts as a default filter - the filter can always be changed when running the report. Note that anyone running this report will only see reporting groups they are permitted to report on based on their permissions.

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Hours Summary Report (Columnar)

The Hours Summary Report (Columnar) allows you to summarize employee hours as a series of columns. Each column represents an interval of time, such as monthly or quarterly. This is an alternative to the other timesheet reports that list data in a row-oriented format.

When creating or editing this report you can set the following properties:

Property	Description
Name	The report name or title, up to 80 characters (required).
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	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. Publishing a report does not allow others to edit it - only the employee who created the report can subsequently edit it.
Reporting Period	The default time period for the report. The reporting period can be overridden when running the report. Note that, depending on the **Report Interval**, the actual start and finish date of the report may not match the reporting period exactly. For instance, if the reporting period is set to "Today" and the report interval is "Yearly" then when the report runs it will snap the start date to Jan 1 and the finish date to Dec 31 of the current year. Due to the columnar nature of the report your date range may be restricted in order to avoid producing too many columns: large numbers of columns can adversely affect the system's performance. For instance, you won't be able to a report with a daily interval for a year as it would produce 365 columns and affect database performance adversely. You can bypass these limits by specifying a report filter, which will reduce the amount of data returned. The report will give you a clear message when you exceed a reporting period limit, and indicate to you which filter to set to increase the limit.
Report Interval	The report interval determines how the data is grouped into columns. For instance, a monthly interval for a report being run over the previous year would show 12 columns, one for each month. Possible values for the report interval are: **Daily**, **Weekly**, **Monthly**, **Quarterly** and **Yearly**. Note that when the report runs it will always snap the start date and finish date to encompass complete intervals, regardless of the **Reporting Period** chosen. For instance, if the reporting period is set to "Today" and the report interval is "Yearly" then when the report runs it will snap the start date to Jan 1 and the finish date to Dec 31 of the current year.

Report Columns	The list of data columns by which to group or summarize the report data into rows (required). You can add or remove columns, and click and drag to change the column order. The list of columns is limited to data that can be recorded with time entries, such as employee and project values, timesheet custom fields, etc. You must have at least one but no more than 10 report columns. Note that the report will automatically insert subtotal rows in the report if you select more than one type of column. For instance, if you have 2 columns, Project.Name and Employee.Name, then the report will insert a subtotal row after each group of projects. If you have 3 columns, Customer.Name, Project.Name and Employee.Name, then the report will insert a subtotal row after each group of projects and after each group of customers.
Summarize	Choose which timesheet hours data you want to total or summarize in the report. This can be **All Hours**, **Work Hours** or **Leave Hours**. If you choose Work Hours or Leave Hours you can optionally limit the hours to specific pay codes. For instance, if you choose only Over Time and Double then the hours totalled on the report for each interval column will be computed as SUM(Over Time + Double Time).
Submitted Filter	Use this filter to restrict the report to only hours for timesheets that are **Submitted** (locked), or only hours for timesheets that are **Open** (unsubmitted). By default all timesheet data is reported on, regardless of its submission status.

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FTE Summary Report (Full Time Equivalent)

The FTE Summary Report allows you to summarize employee hours in full time equivalent employee (FTE) units. The report formats FTE as a series of columns, where each column represents an interval of time, such as monthly or quarterly.

Using FTE units provides a way to measure how many full-time employees would be required to perform the work done in your organization. An FTE is the equivalent of one person working full time. Consider an employee working the following full time schedule:

> 8 hours / day
> X 5 day / week
> X 52 week / year
> = 2,080 hours / year

One employee working full time would equal 1 FTE. Two people each working 4 hours per day, 5 days per week would also equal 1 FTE. The FTE Summary Report computes the FTE value by totalling the hours for each interval and dividing by the appropriate full time equivalent hours. For instance, if the total hours against a project for 1 year was 3,120, then the FTE would be computed as 3,120 / 2,080 = 1.5.

When creating or editing this report you can set the following properties:

Property	Description
Name	The report name or title, up to 80 characters (required).
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	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. Publishing a report does not allow others to edit it - only the employee who created the report can subsequently edit it.
Reporting Period	The default time period for the report. The reporting period can be overridden when running the report. Note that, depending on the **Report Interval**, the actual start and finish date of the report may not match the reporting period exactly. For instance, if the reporting period is set to "Today" and the report interval is "Yearly" then when the report runs it will snap the start date to Jan 1 and the finish date to Dec 31 of the current year. Due to the columnar nature of the report your date range may be restricted in order to avoid producing too many columns: large numbers of columns can adversely affect the system's performance. For instance, you won't be able to a report with a daily interval for a year as it would produce 365 columns and affect database performance adversely. You can bypass these limits by specifying a report filter, which will reduce the amount of data returned. The report will give you a clear message when you exceed a reporting period limit, and indicate to you which filter to set to increase the limit.

Report Interval	The report interval determines how the data is grouped into columns. For instance, a monthly interval for a report being run over the previous year would show 12 columns, one for each month. Possible values for the report interval are: **Daily**, **Weekly**, **Monthly**, **Quarterly** and **Yearly**. Note that when the report runs it will always snap the start date and finish date to encompass complete intervals, regardless of the **Reporting Period** chosen. For instance, if the reporting period is set to "Today" and the report interval is "Yearly" then when the report runs it will snap the start date to Jan 1 and the finish date to Dec 31 of the current year.
Report Columns	The list of data columns by which to group or summarize the report data into rows (required). You can add or remove columns, and click and drag to change the column order. The list of columns is limited to data that can be recorded with time entries, such as employee and project values, timesheet custom fields, etc. You must have at least one but no more than 10 report columns. Note that the report will automatically insert subtotal rows in the report if you select more than one type of column. For instance, if you have 2 columns, Project.Name and Employee.Name, then the report will insert a subtotal row after each group of projects. If you have 3 columns, Customer.Name, Project.Name and Employee.Name, then the report will insert a subtotal row after each group of projects and after each group of customers.

Full Time Equivalent	This is the FTE hours per week used by the report to convert total hours into FTE. Enter the number of hours per week that your organization considers to be full time. For instance, a typical value in North America would be 40. When the **Report Interval** is not weekly then this value is converted to an appropriate amount for the interval in the following manner:
	
	`Interval        FTE Per Period           Example`
	`------------------------------------------------------------------`
	`Daily          Weekly FTE / 5           8      = 40 / 5`
	`Weekly         Weekly FTE               40     = 40`
	`Monthly        (Weekly FTE * 52) / 12   173.33 = (40 * 52) / 12`
	`Quarterly      (Weekly FTE * 52) / 4    520    = (40 * 52) / 4`
	`Yearly         Weekly FTE * 52          2080   = 40 * 52`
	
	Note: If you are running this report for employees who work in different countries or regions that have different FTE hours per week, you can optionally specify an **API Variable** for the Full Time Equivalent. For instance, if you define an employee custom field to hold the full time equivalent weekly hours as "FTE Hours", then you could enter {User.xFTEHours} for Full Time Equivalent. When the report runs it will look up this value for each report row and use it when computing the FTE value for the given column. If {User.xFTEHours} doesn't return a value then the system default will be used (based on the System > General > Default Hours Per Day multiplied by 5).
	
	If using an API Variable make sure that the custom field is of type Number, and that you specify the API Variable name exactly (case-sensitive) enclosed in curly braces.

Entry Type Filter	Use this filter to restrict the report to only **Work** hours or to only **Leave** hours. By default all timesheet hours are included in the report.
Submitted Filter	Use this filter to restrict the report to only hours for timesheets that are **Submitted** (locked), or only hours for timesheets that are **Open** (unsubmitted). By default all timesheet data is reported on, regardless of its submission status.

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Profit Report

This report summarizes profit/loss data based on pay amounts and bill amounts. You can customize this report to break down the data by employee, project, group, etc.

Note that all employee data will be shown in the employee's time zone, regardless of the time zone of the person running the report. For instance, if the report is run by a reporter in the Pacific Time for Jan 1-Jan 7, it will correctly summarize data for an employee in Brisbane using Jan 1 - Jan 7 Brisbane Time. This is different than other timesheet summary reports that do not shift the data.

When creating or editing this report you can set the following properties:

Property	Description
Name	The report name or title, up to 80 characters (required).
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	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. Publishing a report does not allow others to edit it - only the employee who created the report can subsequently edit it.
Reporting Period	The default time period for the report. The reporting period can be overridden when running the report.
Grouping Columns	The list of columns by which to group or summarize the report data into rows (required). You can add or remove columns, and click and drag to change the column order. The list of columns is limited to data that can be recorded with time entries, such as employee and project values, timesheet custom fields, etc. You must have at least one but no more than 10 grouping columns. Note that the report will automatically insert subtotal rows in the report if you select more than one type of column. For instance, if you have 2 columns, Project.Name and Employee.Name, then the report will insert a subtotal row after each group of projects. If you have 3 columns, Customer.Name, Project.Name and Employee.Name, then the report will insert a subtotal row after each group of projects and after each group of customers.

Data Columns	The list of data columns to summarize (required). You can add or remove columns, and click and drag to change the column order. The list of columns is limited to data that is numeric and can be recorded with time entries, such as hours, leave, RT, OT, etc. You must have at least one but no more than 25 data columns. Some data columns are treated differently than in other timesheet summary reports: The "**Time Entry.Pay Amount**" and "**Time Entry.Bill Amount**" columns are computed as the sum of the adjusted rate multiplied by the hours. The pay rates and bill rates used in the calculation are adjusted based on OT/RT/DT factors. For instance, OT hours are paid at 1.5 times the RT rate. You can modify the rate factors by clicking the Options button on the report. Note that the base or RT rate values used are the rates in effect when the time entry was recorded: the total amounts will be correct whether there was only one rate or multiple rates used in the reporting interval. The "**Time Entry.Pay Rate**" and "**Time Entry.Bill Rate**" columns will show the unadjusted rate value (e.g. the base or RT rate). Note that if more than one rate was used during the reporting interval then the **maximum** rate during the interval will be shown. The **Calculation.Profit** column will show the result of subtracting the total pay amount from the total bill amount.
Submitted Filter	Use this filter to restrict the report to only hours for timesheets that are **Submitted** (locked), or only hours for timesheets that are **Open** (unsubmitted). By default all timesheet data is reported on, regardless of its submission status.

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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

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	The base currency for application. This will be the default currency when displaying or prompting for currency amounts. In addition, asset entries (for example expense entries), if configured to allow entry of cost amounts in local currencies, will convert the entered values into the base currency, for ease of reporting. Note that the list of available currencies can be modified from the System > System Options page. See the System Options topic for more information.
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. *Self-hosted version only.*
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:
		None	No connection encryption	
		TLS	Transport Layer Security encryption	
		SSL	Secure Socket Layer encryption	

Security	If your SMTP server is using connection security you will need to select the appropriate value here. Your options are: **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. *Self-hosted version only.*
Password	The optional password for the outgoing email server. *Self-hosted version only.*
Reply Address	The email reply address for notifications sent by the application. This is required if you have specified the outgoing email server address. 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. 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.

Audit Level	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:

Audit Levels	
None	No auditing
Standard	Standard auditing, which includes the following audit controls: • 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: • 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 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 ${System.url} will be replaced with this value (see the Notices topic for more details). *Self-hosted version only.*

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](#)
- [System Tools](#)
- [License](#)
- [System Lists](#)

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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 WBS component is enabled.
Dependent	By default, components in the WBS structure are independent of each other, and are essentially flat lists. By enabling dependency on a WBS component, you can restrict the list of items presented to your employees to just those for the selected parent component, eliminating a common source of data entry errors. With dependency enabled the WBS structure can more resemble a tree structure. There are two types of dependency settings: **Optional** and **Required**. Optional dependency means items that do not have a parent specified for them will be visible regardless of which parent is selected by the employee. However, items with one or more parents will only be visible if those parents are selected. Required dependency means any item without a parent will not be visible. You must assign each item a parent if you want employees to be able to select it. Note: For large lists of items (>50K) it is highly recommended that if you enable dependency you make it required. This will drastically improve performance of pick lists. 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 select the appropriate 'Dependent' selection from the Dependent menu:

Selecting "Yes" 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:

If you leave the Customers section blank (no restrictions) then this project will be not be visible if "Yes - Parent Required" was chosen. If "Yes - Parent Optional" was selected and there were no parents specified, this project would always appear 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.

Translations

The terminology you enter should be appropriate for the default language of your system (as configured on the System > General page). You can provide translations for up to 4 additional languages by clicking the globe icon next to each terminology row. Users will see the appropriate translation based on the Locale setting in their employee profile (as configured in their employee record on the Employees tab).

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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. A maximum of four (4) approval levels are supported.

The following properties can be configured for each approval level:

Property	Description
Enabled	Indicates whether the approval level is enabled.
Display Name	The name for the approval level, up to 40 characters. Names should be as short as possible, and not include the word "approval" or "approved" as that will often be redundant in places where approval information is displayed by the application. A blank name is allowed, but if you have more than one approval level enabled the names must be unique.
Applies To	You can specify which areas of the application the enabled approval level is applicable. For instance, you might want 2 levels for time approval, but only one level for project approval. Enabled approval levels always apply to time (e.g. timesheet approval on the **Approvals > Timesheet Approvals page**), leave requests (approval from the **Leave Requests page**) and assets (approval of asset entries and sheets, from the **Assets > Asset Entries page**). You can optionally enable the level for projects if you intend on doing project approval (e.g. approval from the **Approvals > Project Time Approvals page**).

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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.

Translations

The terminology you enter should be appropriate for the default language of your system (as configured on the System > General page). You can provide translations for up to 4 additional languages by clicking the globe icon next to each terminology row. Users will see the appropriate translation based on the Locale setting in their employee profile (as configured in their employee record on the Employees tab).

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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. Supported formats are PNG, GIF and JPG, and the image size can be at most 320x100 (320 pixels in width and 100 pixels in height). Note that when you upload an application logo file a copy of it will be stored in the database: the uploaded file is no longer needed by the application.

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 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 https://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.
Barcode Scanner	Barcode scanner support allows you to use Codereadr barcode scanning apps/devices for employee in/out, asset tracking and other applications. For more information see the Barcode Scanner Support 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.

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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 data fields to export, as well as their order. This option is useful if you need to integrate 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 You can create a customized export fields by adding Expression Fields. See the Expression Fields help topic for more information.
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

Pay Code Rollup	Normally a timesheet export will have one record in the export file for each time entry on an employee's timesheet. You can use the following Pay Code Rollup options to modify this: **Rollup time entries by pay code:** This option will summarize or total the hours by pay code for each employee timesheet. For instance, let's suppose employee Jeff worked 4 days of regular time and 1 day of vacation, and had 5 time entries on his timesheet. The export file would show only two rows for Jeff: Jeff, RT, 32.00 Jeff, Vacation, 8.00 As you can see above, the 5 time entries have been rolled up or summarized into two rows. If Jeff had worked on only one pay code in the week then there would only be one row in the export file for him. If Jeff had worked on 3 pay codes in the week then there would be 3 rows in the export file for him. **Split time entries by pay code:** This option will split a time entry into multiple rows if there is more than one pay code value for the time entry. For instance, let's suppose Jeff had worked 41 hours in the week, with 9 hours on Friday (8 regular time and 1 overtime). He had 5 time entries on his timesheet. The export file would show 6 rows: Jeff, Mon, RT, 8.00 Jeff, Tue, RT, 8.00 Jeff, Wed, RT, 8.00 Jeff, Thu, RT, 8.00 Jeff, Fri, RT, 8.00 Jeff, Fri, OT, 1.00 As you can see above, the Friday time entry has been split into two records in the export file, for a total of 6 records for Jeff.
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><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></table>
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: <table><tr><td>h</td><td>Hour in day using 12 hour clock (1 - 12). Use hh to always output a two-digit hour, e.g. "01".</td></tr><tr><td>H</td><td>Hour in day using 24-hour clock (0 - 23). Use HH to always output a two digit hour, e.g. "01".</td></tr><tr><td>m</td><td>Minute in hour. Use mm to always output a two-digit minute, e.g. "01".</td></tr><tr><td>a</td><td>A.M. or P.M.</td></tr></table>

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	You have several options for where you can send the export file:
	<table><tr><td>Directory</td><td>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>FTP Server</td><td>The export file will be sent to a remote directory using the FTP protocol.</td></tr><tr><td>Web Directory</td><td>The export file will be sent to the customer's web directory, e.g. "https://someco.pacifictimesheet.com/customers/someco".</td></tr></table>
	If you choose "FTP Server" the following properties must be configured by clicking the settings button that appears to the right of the menu:
	<table><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>If the FTP server has connection security enabled you will need to set the appropriate value here. Your options are:<table><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>
Directory	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. 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.
File Name	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.
Format	The format of the export file, either comma-separated-values (CSV) or Microsoft Excel (XLS).

File Encryption	You can optionally encrypt the export file using PGP (Pretty Good Privacy). If you choose this option you need to specify the following options:
	<table><tr><td>Encryption Key</td><td>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>Armor</td><td>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>
	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'.
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.

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Expression Fields

You can create custom export fields using Expression Fields. Expression fields allow you to access and combine a large number of variables for export using simple **JavaScript** syntax. For instance, you can combine RT and OT using an expression such as:

```
{TimeEntry.payCode1}+{TimeEntry.payCode2}
```

Or you could combine the customer, project and task names into one field:

```
{TimeEntry.customerId.name}+"."+{TimeEntry.projectId.name}+"."+{TimeEntry.taskId.name}
```

Expressions must evaluate to either a number or string (text) value, as per the usual rules of JavaScript. For instance, the following expression would evaluate to a number:

```
{TimeEntry.hours}+100
```

But the following expression would evaluate to a string:

```
{TimeEntry.hours}+" hours"
```

> **Note 1**: null variable values will be converted to a blank value if the variable type is string, or to zero if the variable type is a number.

Comparisons and Logical Operations

You can use JavaScript comparison and conditional operators. For example, you could output an employee custom field value depending upon a pay code ID:

```
if ({TimeEntry.payCodeId.uid}=="maternity")
   {TimeEntry.userId.xMaternityAccount};
else
   "";
```

You can also compare numeric values:

```
if ({TimeEntry.hours}>8.0)
   "OT";
else
   "RT";
```

> **Note 2**: You should not use the "return" JavaScript keyword. Instead, the expression should just evaluate to a single value.

Debugging Scripting Errors

If your expression has a syntax error then the cause will outputted to the export file (as a string). Even if the syntax is correct, you could encounter errors in the evaluated expression if your data is not valid (for example, you divide by zero). You will want to put any proper checks in place in the expression to avoid this (you can even use try/catch exception handling if warranted).

Time Entry Export Variables

Here is a partial list of variables you can refer to in your expression. Note that all variables must be enclosed in "{" and "}".

Variable	Data Type	Description
{TimeEntry.date}	Date	Date of time entry. Note that you can control the formatting of this using a pattern argument - see the section below on Date Formatting.
{TimeEntry.start}	Date-time	Date and time of start of time entry. Note that you can control the formatting of this using a pattern argument - see the section below on Date Formatting.
{TimeEntry.finish}	Date-time	Date and time of finish of time entry. Note that you can control the formatting of this using a pattern argument - see the section below on Date Formatting.
{TimeEntry.hours}	Numeric	Total hours for time entry.
{TimeEntry.type}	Text	Type of time entry, either 'Work' or 'Leave'.
{TimeEntry.workHours}	Numeric	Same as hours if type is 'Work', zero otherwise.
{TimeEntry.leaveHours}	Numeric	Same as hours if type is 'Leave', zero otherwise.
{TimeEntry.payCode1}	Numeric	Regular hours.
{TimeEntry.payCode2}	Numeric	Overtime hours.
{TimeEntry.payCode3}	Numeric	Double-time hours.
{TimeEntry.payCode4}	Numeric	Triple-time hours.
{TimeEntry.userId.fullName}	Text	Full name (last, first) of employee for this entry. You can also use the alias {User.fullName}.
{TimeEntry.userId.uid}	Text	ID of employee for this entry. You can also use the alias {User.uid}.
{TimeEntry.userId.login}	Text	Login name of employee for this entry. You can also use the alias {User.login}.
{TimeEntry.groupId.name}	Text	Name of group (department/crew) for this entry. You can also use the alias {Group.name}.

{TimeEntry.groupId.uid}	Text	ID of group (department/crew) for this entry. You can also use the alias {Group.uid}.
{TimeEntry.payCodeId.name}	Text	ID of pay code for this entry. You can also use the alias {PayCode.name}.
{TimeEntry.payCodeId.uid}	Text	ID of pay code for this entry. You can also use the alias {PayCode.uid}.
{TimeEntry.customerId.name}	Text	Name of customer for this entry. You can also use the alias {Customer.name}.
{TimeEntry.customerId.uid}	Text	ID of customer for this entry. You can also use the alias {Customer.uid}.
{TimeEntry.projectGroupId.name}	Text	Name of project group for this entry. You can also use the alias {ProjectGroup.name}.
{TimeEntry.projectGroupId.uid}	Text	ID of project group for this entry. You can also use the alias {ProjectGroup.uid}.
{TimeEntry.projectId.name}	Text	Name of project for this entry. You can also use the alias {Project.name}.
{TimeEntry.projectId.uid}	Text	ID of project for this entry. You can also use the alias {Project.uid}.
{TimeEntry.taskGroupId.name}	Text	Name of task group for this entry. You can also use the alias {TaskGroup.name}.
{TimeEntry.taskGroupId.uid}	Text	ID of task group for this entry. You can also use the alias {TaskGroup.uid}.
{TimeEntry.taskId.name}	Text	Name of task for this entry. You can also use the alias {Task.name}.
{TimeEntry.taskId.uid}	Text	ID of task for this entry. You can also use the alias {Task.uid}.

You may also refer to any object's custom fields, using the appropriate variable name. For example, the "Maternity Account" custom field on an employee object would have a variable name like this:

{TimeEntry.userId.xMaternityAccount}

You can get the variable name of any custom field from the custom field properties page for the appropriate object.

Time Sheet Export Variables

Variable	Data Type	Description

| {TimeSheet.start} | Date-time | Date and time of start of sheet period for the time entry being exported. Note that you can control the formatting of this using a pattern argument - see the section below on Date Formatting. |
| {TimeSheet.finish} | Date-time | Date and time of finish of time sheet period for the time entry being exported. Note that you can control the formatting of this using a pattern argument - see the section below on Date Formatting. |

Aliases

Many expression variables can be replaced with shortcuts or aliases. For example, TimeEntry.projectId.uid can be replaced with Project.uid, or TimeEntry.userId.fullName can be replaced with User.fullName. You will want to use the full expression variable name when there is ambiguity about which field to refer to. For example, to get the full name of the user who submitted the time you would use TimeEntry.lockerId.fullName, or to get the full name of the first approver you would use TimeEntry.apprv1Id.fullName.

Date Formatting

You can control the formatting of dates, times and date-times by adding a date format pattern as an argument to the variable. The format of this pattern is the Java Simple Date Format Pattern, described here:

https://docs.oracle.com/javase/10/docs/api/java/text/SimpleDateFormat.html

If you want to format a date variable you would add a date pattern argument after the variable name. For instance, to format a date variable as YYYY-MM-DD you would do the following:

{TimeEntry.start,yyyy-MM-dd}

The date pattern argument follows a comma after the name of the variable. Make sure the argument is contained within the '}', and you cannot use the '{', '}' or ',' characters in date patterns.

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QuickBooks Online Data Integration

Intuit QuickBooks Online (QBO) allows the importing of timesheet data (called Time Activities in QBO) from an external source. Pacific Timesheet provides a QBO-compatible timesheet integration that allows the transfer of employee timesheet data directly into QBO. Once transferred, the time activities can then be used for invoicing, payroll and reporting from within QBO.

> Note 1: The Pacific Timesheet connection to QBO is configured from the **System > General > Data Integration > Timesheet Export - QuickBooks Online** page. If you do not see the "Timesheet Export - QuickBooks Online" option on this page it means you have already enabled both of the first two Timesheet Exports. You will need to disable the second Timesheet Export in order to see the Timesheet Export - QuickBooks Online option.

> Note 2: Pacific Timesheet will only upload time activities to your QBO account. It will not modify objects such as employees, customers, etc. in your QBO system. Your QBO account is considered the system of record for employees, customers, etc. and for data safety Pacific Timesheet will not modify your QBO account except to upload time activities.

To connect to a QuickBooks Online account you will need to configure the following properties in Pacific Timesheet (from the **System > General > Data Integration > Timesheet Export - QuickBooks Online** page):

Property	Description
Enabled	Check this option to enable exporting of timesheet data from Pacific Timesheet to QBO. When enabled you will see an "Export - QuickBooks Online" item in the options menu on the Timesheets and Approvals tabs.
Authenticated	Click the "Click to Authenticate" link to connect to your QBO account and allow access to it from Pacific Timesheet. For security, after 100 days you will be asked to re-authenticate. You can either do this from the System > General > Data Integration > QuickBooks Online page, or when manually synchronizing or uploading data (you will be prompted automatically if the authentication has expired). Note that for auto-synchronization and auto-export of data you will need to go to the System > General > Data Integration > QuickBooks Online page every 100 days to re-authenticate, or the background process will fail. You and other administrators will be given a warning when the authentication is going to expire on the Home page several days before the expiration. If you are not using the auto-synchronization or auto-export options then you can re-authenticate when you manually synchronize or export timesheet data.

Mapping	Mapping allows you to specify how objects in QuickBooks are mapped to objects in Pacific Timesheet. You can additional specify whether objects in QuickBooks are synchronized (downloaded from QuickBooks) and created in Pacific Timesheet.
	<table><tr><th>QB Object</th><th>Pacific Timesheet Object</th></tr><tr><td>Employee</td><td>QB employees always maps to Pacific Timesheet employees.</td></tr><tr><td>Vendor</td><td>QB vendors/contractors always map to Pacific Timesheet employees.</td></tr><tr><td>Customer</td><td>QB customers can be mapped to any Pacific Timesheet WBS object, but are generally mapped to the customer object.</td></tr><tr><td>Project</td><td>QB projects should be mapped to the Pacific Timesheet WBS object that is dependent on the project object. Additionally, as you can reuse project names in QB under different customers, you need to enable the "Allow duplicate project names" option on the Projects > Project Options page. If you do not use projects in QB (this is a QB advanced setting option) then you can set the mapping to 'blank' and projects will be ignored.</td></tr><tr><td>Service Item</td><td>QB service items can be mapped to any Pacific Timesheet WBS object, but are generally mapped to the task object.</td></tr></table> Each mapping that has synchronization enabled will result in a custom field named "QBO ID" being created for the mapped object in Pacific Timesheet. For instance, if you enable synchronization for employees, every employee in Pacific Timesheet will have a QBO ID field that is automatically filled in when the data is synchronized. The value in this field should NOT be modified and should be considered read-only.
Last Synchronized	Clicking the "Synchronize Now" link will download objects from QB and create (or update, if changed) the correspondingly mapped object in Pacific Timesheet. Only objects with the "Synchronize" option checked in the mapping table will be downloaded. Note that if your authentication has expired you will be automatically asked to authenticate again upon clicking the "Synchronize Now" link.

Timesheet Export:

When "Timesheet Export - QuickBooks Online" is enabled, you will see the 'Export - QuickBooks Online" option under the "tools" menu (triangle button) on both the Timesheets and Approvals tabs. Choosing this option will prompt you if you want to export the listed timesheets to QBO. Note that only submitted (locked) timesheets can be uploaded to QBO.

Successfully uploaded timesheets will be marked as exported. However, some timesheet data might be skipped or generate an error for the following reasons:

• Timesheets or timesheet data that have already been exported will not be re-exported and are ignored.
• Timesheets for employees in Pacific Timesheet that have no corresponding employee, contractor or vendor in QBO will be ignored.
• Time entries in Pacific Timesheet with no customer specified will result in an error and not be uploaded. The customer field is a required field and should be configured as such for timesheet templates. The selected customer for a time entry must match an customer object in QBO or an error will result.
• Project and service items are optional, but if a value is selected then it must match the

corresponding object in QBO or an error will result.

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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 https://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 ${System.company} 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".
COMPANYCREATE TIME	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, formatted as YYYY-MM-DD (the standard QuickBooks date exchange format). This is generally set to the variable ${TimeEntry.date}, described below.
JOB	The QuickBooks job, which is in the format Customer:Job. This is generally set to the variable ${Customer.name}:${Project.name}, 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 ${User.name} or ${User.fullName}, described below.
ITEM	The name of the service item assigned to the activity. This is generally set to the variable ${Task.name}, described below.
PITEM	The name of the payroll item. This is generally set to the variable ${PayCode.name}, 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 ${TimeEntry.hours}, 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 ${TimeEntry.notes}, 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 ${TimeEntry.billFlag}, 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 (and are **case-sensitive**):

Variable	Description
${TimeEntry.date}	The date of the time entry, formatted as YYYY-MM-DD (the standard QuickBooks date exchange format). This is generally used for the DATE field of a TIMEACT record.
${TimeEntry.dateUS}	Just like ${TimeEntry.date}, only formatted as M/DD/YY. Some older versions of QuickBooks require this format.
${TimeEntry.hours}	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.
${TimeEntry.notes}	The time entry notes, if any. This is generally used for the NOTE field of a TIMEACT record.
${TimeEntry.billFlag}	The time entry billable flag, with the value "0" if the time entry is not billable, or "1" if the time entry is billable.
${Customer.name}	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.
${User.name}	The name of the employee, formatted "Lastname, Firstname". This is generally used for the EMP field of a TIMEACT record.
${User.fullName}	The name of the employee, formatted as "Firstname Lastname". This is generally used for the EMP field of a TIMEACT record.
${User.id}	The ID of the employee. This is generally used for the EMP field of a TIMEACT record.
${Customer.id}	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.
${ProjectGroup.name}	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.
${ProjectGroup.id}	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.
${Project.name}	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.

${Project.id}	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.
${TaskGroup.name}	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.
${TaskGroup.id}	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.
${Task.name}	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.
${Task.id}	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.
${PayCode.name}	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.
${PayCode.id}	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 ID property 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.

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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.

Note: Cloud systems support auto-exporting to FTP sites only (via FTP/FTPS protocol). Self-hosted systems can additionally auto-export to file system directories.

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	You have the option of exporting to a directory on the computer running the Pacific Timesheet service (self-hosted only), exporting to an FTP (File Transfer Protocol) server, or to a Dropbox folder.
	If you choose "**FTP Server**" the following properties must be configured by clicking the settings button that appears to the right of the menu:

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	If the FTP server has connection security enabled you will need to set the appropriate value here. Your options are:

None	No connection encryption
Implicit SSL	Implicit Secure Socket Layer encryption (FTPS)
Explicit SSL	Explicit Secure Socket Layer encryption, also known as (FTPES)

If you choose "**Dropbox**" you can export the data to a Dropbox folder of your choosing. Click the "Link New Account" button to open a web page that gives you the option to allow Pacific Timesheet to access the Dropbox account (you will be prompted to log into Dropbox if not already logged in). When you click "Allow" you will be given an authorization code. Select and copy this code, then switch back to Pacific Timesheet and enter the authorization code into the dialog.

Once you have saved the configuration, Pacific Timesheet will create a "PacificTimesheet" folder within the "Apps" folder in the Dropbox account. Pacific Timesheet will only be able to upload files to this folder. You can further specify a sub-folder within this folder: for instance, if you specify a sub-folder named "exports" then there would be an "/Apps/PacificTimesheet/exports" path created in the Dropbox account, and all export files would be uploaded to that folder.

Directory	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.
	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.
	If the "Export To" property is set to "Dropbox" then this will be the optional sub-folder within the Dropbox account to upload the export files to. The sub-folder will be created directly under the /Apps/PacificTimesheet folder of the Dropbox account. If left blank then export files will be uploaded to the /Apps/PacificTimesheet folder of the Dropbox account.
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	You can optionally encrypt the export file using PGP (Pretty Good Privacy). If you choose this option you need to specify the following options: <table><tr><td>Encryption Key</td><td>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>Armor</td><td>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> 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'.
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.

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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.

Note: Cloud systems support auto-importing from FTP sites only (via FTP/FTPS protocol). Self-hosted systems can additionally auto-import files from file system directories.

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	You have the option of importing from a directory on the computer running the Pacific Timesheet service (self-hosted only), importing from an FTP (File Transfer Protocol) server, or importing from a Dropbox folder.

If you choose "**FTP Server**" the following properties must be configured by clicking the settings button that appears to the right of the menu:

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	If the FTP server has connection security enabled you will need to set the appropriate value here. Your options are:

None	No connection encryption
Implicit SSL	Implicit Secure Socket Layer encryption (FTPS)
Explicit SSL	Explicit Secure Socket Layer encryption, also known as (FTPES)

If you choose "**Dropbox**" you can import the data from a Dropbox folder of your choosing. Click the "Link New Account" button to open a web page that gives you the option to allow Pacific Timesheet to access the Dropbox account (you will be prompted to log into Dropbox if not already logged in). When you click "Allow" you will be given an authorization code. Select and copy this code, then switch back to Pacific Timesheet and enter the authorization code into the dialog.

Once you have saved the configuration, Pacific Timesheet will create a "PacificTimesheet" folder within the "Apps" folder in the Dropbox account. Pacific Timesheet will only be able to see files within this folder. You can further specify a sub-folder within this folder: for instance, if you specify a sub-folder named "imports" then there would be an "/Apps/PacificTimesheet/imports" path created in the Dropbox account, and only that folder would be scanned for import files.

Directory	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.
	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.
	If the "Import From" property is set to "Dropbox" then this will be the optional sub-folder within the Dropbox account to scan for import files. The sub-folder will be created directly under the /Apps/PacificTimesheet folder of the Dropbox account. If left blank then files will be scanned for in the /Apps/PacificTimesheet folder of the Dropbox account. Import files in folders below the specified sub-folder will be ignored - only the top level will be scanned.
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-login-.csv", "resources-login-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.

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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Barcode Scanner Support

Pacific Timesheet supports barcode reader software and devices from Codereadr (
codereadr.com).

Barcode Settings

Settings are system-wide properties that affect all barcode scanning services:

Property	Description
Enable Codereadr support	Check this option to enable support for Codereadr barcode scanning. If not enabled then all Codereadr barcode scans will be ignored by Pacific Timesheet.
Enable diagnostic logging	Check this option to enable diagnostic logging. When checked, detailed information on each barcode scan submitted to Pacific Timesheet will be written to the System Event Log. Log entries can be viewed from the Reports > System > System Event Log report. Note that this setting is generally used only when initially configuring a new Codereadr service. It will automatically turn itself off after 7 days, to avoid cluttering the system event log.

Barcode Services

Services correspond to Codereadr services. Administrators need to create a service entry in Pacific Timesheet for each Codereadr service that will be sending scans to Pacific Timesheet. Services have the following properties:

Property	Description
Service ID	The Codereadr Service ID (required). When a barcode scan is sent to Pacific Timesheet it will identify itself with a Codereadr Service ID, and there must be a matching service in Pacific Timesheet in order to process the scan. There are at least a couple of ways to identify the service ID of your Codereadr service: go to codereadr.com and 1) list your services (Services tab) and click on a service and you will see the Service ID in the address bar of your web browser, or 2) list your scans (Scans tab) and click the View Postback Log link below a scan to see the service ID.
Active	Check this option to enable this service. If not enabled then barcode scans with this Service ID will be ignored by Pacific Timesheet.
Description	A description of this barcode service (required, up to 255 characters). The value you enter here should help you more easily identify the corresponding service in Codereadr, as Codereadr doesn't show service IDs prominently.

Field Mapping	Codereadr scans are sent to Pacific Timesheet as a list of data fields. These fields must be mapped to corresponding Pacific Timesheet fields. A typical mapping might look like this:

Codereadr Field/Question ID	Pacific Timesheet Field
scanid	Scan ID
tid	Employee.ID
timestamp	Timestamp
1355861	Punch
1355862	Project.ID
1355863	Task.ID

Note 1: "scanid", "tid" and "timestamp" are required field mappings.

Note 2: The Codereadr field names are case-sensitive! For instance, "Scanid" will not match, and must be lower-case "scanid".

Note 3: If certain questions are required, such as the Project, then you must set the corresponding field on the employee's timesheet template to be required. This is done on the System > Templates page in Pacific Timesheet.

Note: changes to these Pacific Timesheet settings can take up to 30 seconds to take effect.

Codereadr Service Configuration

Log into codereadr.com to create your barcode scan service. The type of service you will create is "Postback URL (Real-Time)":

Service type: Postback URL (Real-Time)

Postback URL: <hostname>/timesheet/codereadr

For example, if your Pacific Timesheet cloud system URL is https://xyzco.pacifictimesheet.com then the Codereadr postback URL would be:

https://xyzco.pacifictimesheet.com/timesheet/codereadr

When creating your **service questions**, the first question should be the "**punch**" status (first to avoid having the keyboard on the phone popping up), and the possible answers must be "**In**" or "**Out**" (case-insensitive).

After specifying your punch status question, you can then have zero or more barcode questions that would map to a Pacific Timesheet project, task, etc.

The following Advanced settings are generally also enabled:

[x] Enable Kiosk Mode:

{

  "pin":"1234",

  "stop_auto_next":"true",

```
  "manual_input":"true"

}

[x] Enable custom display configuration:

{

  "value_label":"Badge",

  "response_hidden":"false"

}
```

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Time Clock 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	• PIN • Smart Card • Fingerprint • Combination
ZK Software usa.zksoftware.com	• 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 "Authentication/Log Setup" link on the left side of the page, then enable the "**Auto IN/OUT**" and "**Auto Reset IN/OUT**" settings.

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. Master/Client Configuration

In this configuration you define one of your time clocks as the master device. Then every other device is defined as a client and configured to synchronize with the master device. In this configuration you only need to configure and enroll users at the master device. Only the master device should be added to Pacific Timesheet for synchronization as it will collect access logs from the client timeclocks.

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

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.

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Data Connections

The Data Connections page allows you to review your cloud drive connections for Dropbox and Microsoft OneDrive. You can configure auto-import and exports to use these connections. The Data Connections page allows you to review and test (and re-authenticate, if need be) your cloud drive connections, as well as to delete and add connections.

You can also add new data connections from the export options or from the auto-import options pages. New connections added from the Data Connections page will be available for use from the export/import options pages, as well.

Note: When authenticating a cloud drive connection, you will be redirected to the vendor's (e.g. Dropbox's) authentication page. Once successfully authenticated the new connection will appear in Pacific Timesheet. The vendor's authentication page will usually set cookies that will persist the account name/email address used for the authentication. If you need to add additional accounts for the same vendor you will have to restart the browser, use another browser, or even delete cookies from the vendor's site. Otherwise you may end up bypassing the authentication page without being asked for the account name/email address.

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System Options

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

Property	Description
Crew Timesheets	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. Note: You can change the terminology 'Crew' to suit your organization's needs. The Terminology topic has more information.
Crew Mobile App	If Crew Timesheets is enabled you will see the "Mobile App" options link. Clicking this allows you to specify settings for users of the Pacific Timesheet - Crew mobile app (for iOS and Android). You can specify the following options: **Data Retention** — How long data entered using the mobile app is stored on the mobile device. The app is designed to operate when there is no network connection and therefore stores crew timesheet and asset data on the mobile device. When a network connection is available it will synchronize and upload/synchronize any stored data to the cloud system. Data stored on the mobile device will eventually be purged after the number of days specified for data retention (regardless of whether it has been uploaded or not, though the user will be notified if un-uploaded data is nearing its purge date). **Enabled Leave** — Specify which types of leave paycodes (if any) will be recorded on the mobile app. As the mobile app is designed to work offline, any leave recorded on it will be assumed to be accurate and will therefore erase any potential leave of the same paycode on the cloud system when the crew timesheet is uploaded. Typically you would allow paycodes like Sick or Per Diem to be recorded on the mobile app. Scheduled leave like Vacation or Holiday would not generally be recorded on the mobile app as in offline situations the mobile app might not be aware of such scheduled events.
Asset Tracking	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. Note: You can change the terminology 'Asset' to suit your organization's needs. The Terminology topic has more information.

Location Tracking	If enabled then employee locations will be tracked as they record their time. Checking the "Location Tracking" checkbox will result in asset tracking being enabled, and a new asset type named "Location" being created. You may still need to enable / disable the "Location" asset type for each appropriate timesheet template (on the System > Templates page). As employees enter time on their timesheets (or crew leads enter time for crews) a new location entry will be created indicating the location along with a timestamp. Subsequent data entry for the same day will only result in new location entries if the employee's location has changed by more than about 11 meters (36 feet). Locations will be more accurate for devices that have GPS, but a reasonably close location will usually be recorded even using computers/tablets without GPS (depending upon the OS and web browser).
Export File EOL	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.
Import File Blank Values	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.
Enabled Currencies	Select which currencies are applicable for you organization. Users will only be able to choose a currency type from the list of enabled currencies. For easiest data entry for your users you should enable as few currency types as possible so they do not have to navigate a long menu of options. Enabling or disabling currencies will not affect any previously entered data: this setting only alters the list of currency types a user can select when entering, say, and expense entry in a local currency.
Picker Button Width	The picker button is the menu button that lets you choose projects, tasks, expenses, etc. on many pages of the application. When used on pages where real estate is at a premium, such as the Crew Timesheet or Expense Sheet pages, it may be helpful to specify a maximum width in order prevent the page from becoming too wide and unwieldy. The value you specify is in units of "em", meaning the size of the widest character in the alphabet, e.g. "M" (which is where the name "em" comes from). So if you specify a value of 20 then you are guaranteed to see at least 20 characters, and generally many more as most characters are not as wide as "M". If a value is truncated then you can always see the full value by simply clicking the menu button.
Mobile Picker Fields	You can control how much information is displayed in the list of projects, expenses, etc. shown when you search for these items in the mobile client. You may not want to show the description, for instance, if you prefer to see more items at one time on the screen.

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System/Administrative Tools

System tools are advanced utilities that can be used to perform periodic administrative tasks, such as re-running leave accruals after making a policy change that need to be applied retroactively, or mass-updating timesheet data that needs to be charged to a different project or group.

Rerun Accruals Wizard

The Rerun Accruals Wizard is tool that will walk you through reprocessing employee leave accruals for a past period of time. You might use this wizard after making an accrual policy change that needs to be applied retroactively to a set of employees. When the wizard runs it will remove all old accruals for the affected employees and date range and generate new ones based on their current policy settings.

The wizard will collect the following information from you before running:

Rerun Accruals (Wizard)	
Policies	Select one or more employee policies with accrual rules that you wish to reprocess.
Balances	Select one or more balances that you wish to reprocess.
Employees	This is an optional filter that allows you to limit the reprocessing to specific employees. If you don't specify any employees then ALL employees with the selected policies will be reprocessed. To select an employee, start typing a name or ID: a list of matching employees will appear for you to choose from (you must type at least 2 characters for the list to show).
Date Range	Select the date range over which you want to rerun accruals. Processing runs from midnight at the start of the date range to 11:59 PM (23:59) at the end of the date range, in the time zone of each employee being processed.

Once this information is collected you will be given a chance to review all of the settings before running the wizard. As reprocessing accruals can affect current timesheet users by altering their balances, you should only run this wizard during off-peak usage hours, e.g. after 5:00 PM if most users finish work by then.

Mass Update Wizard

The Mass Update Wizard is tool that will walk you through updating multiple time and asset entries for a past period of time. You might use this wizard to make mass changes to project, department, etc. values for historical employee data. The wizard will not alter timesheet hours or asset entry amounts, nor will it create or delete time or asset entries - it will only change how those entries are classified. For example, you could use this wizard to change all time recorded against Project 1 to Project 2 for the past 3 months.

Note that the Mass Update Wizard does NOT update bill or pay rates and amounts based on any new values. For instance, if your bill rate depends on the project, and you are mass updating a new project value, the original bill rates and amounts for the affected records will be left unchanged.

Warning: You cannot undo the changes made by the Mass Update Wizard - use extreme caution when running this wizard and verify every setting before clicking the Run button!

The wizard will collect the following information from you before running:

Mass Update (Wizard)	
'Include' Fields	Specify one or more entry field values to determine which time or asset entries will be included in the mass update. To select a value start typing a name or ID: a list of matching items will appear for you to choose from. If you do not choose any value for a particular 'include' field then ALL entries will be matched for that field. For instance, if you leave the Project 'include' field blank then entries with [NULL], Project 1, Project 2, etc. project values will match. To select or match the null value, start typing the expression 'null' (without the quotes) to see the [NULL] value option. The [NULL] value will match entries where the particular field was left unset or blank by the employee.
'Set As' Fields	Specify the new value for the field for the records specified by the 'Include' fields property. To select a value start typing a name or ID: a list of matching items will appear for you to choose from. Leave the 'Set As' field value blank for it to be ignored and left unchanged. To set the field to a null value, start typing the expression 'null' (without the quotes) to see the [NULL] value option. The [NULL] value will clear out any previous value the record contained.
Entry Types	If you have assets enabled you can specify whether time entries, asset entries or both types of entries are included in the mass update. If you do not have assets enabled then you will not see this option and time entries will always only be updated.
Employees	This is an optional filter that allows you to limit the mass update to specific employees. If you don't specify any employees then ALL employee records with specified 'Include' field values will be updated. To select an employee start typing a name or ID: a list of matching employees will appear for you to choose from (you must type at least 2 characters for the list to show).
Date Range	Select the date range for the entries to be included in the mass update. Processing runs from midnight at the start of the date range to 11:59 PM (23:59) at the end of the date range, in your time zone (the time zone of the system administrator running the wizard, not the time zone of the employees whose records are being updated).

Once this information is collected you will be given a chance to review all of the settings before running the wizard. This wizard will process both submitted (locked) and unsubmitted entries. If mass-updating a date range that has unsubmitted data you should consider running this wizard during off-peak usage hours, e.g. after 5:00 PM if most users finish work by then.

Update Bill/Pay Rates Wizard

The Update Bill/Pay Rates wizard is used to update past time entries to use the current bill and pay rate settings. When you save any changes to an employee's bill or pay rates the change takes effect immediately, but only for current and future timesheets. This wizard allows you to apply the current bill and pay rate values retroactively, without having to manually adjust individual timesheets.

The wizard will collect the following information from you before running:

Update Bill/Pay Rates (Wizard)	
Rate Type	Select the type of rate you want to update, either Bill, Pay or Both.
Employees	This is an optional filter that allows you to limit the updating to specific employees. If you don't specify any employees then ALL employees with time entries in the specified date range will be reprocessed. To select an employee, start typing a name or ID: a list of matching employees will appear for you to choose from (you must type at least 2 characters for the list to show).
Date Range	Select the date range over which you want to update the rates. Time entries that fall within midnight at the start of the date range to 11:59 PM (23:59) at the end of the date range will be updated.

Once this information is collected you will be given a chance to review all of the settings before executing the update. If updating many users it is suggested you run this wizard during off-peak usage hours, e.g. after 5:00 PM if most users finish work by then.

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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. *Note that this option is unavailable for Work type pay codes: it is intended for Leave pay codes such as Vacation.* *Note that this option is unavailable if the "Don't add to hours total" option is enabled in the Options dialog (see below). When this option is enabled the pay code is assumed to be for non-time data such as per-diem amounts.*

Balance Enabled	If enabled, a balance will be tracked for this pay code. Leave hours recorded against this pay code will automatically be deducted from the associated balance. The Employee Balances topic has more information. *Note that this option is unavailable for Work type pay codes: it is intended for Leave pay codes such as Vacation.* *Note that this option is unavailable if the "Don't add to hours total" option is enabled in the Options dialog (see below). When this option is enabled the pay code is assumed to be for non-time data such as per-diem amounts.*
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 by clicking the Options link in the lower-right corner of the Edit Pay Code page:

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.
Don't add to hours total	Checking this option will result in any values entered for this pay code on a timesheet not contributing or adding to the employee's hours. This is typically used for tracking per-diem amounts or other non-time data. *Note that when this option is enabled the pay code will no longer be requestable or have a balance.*

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	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: Work Only: If checked, this field will only be shown on work rows, otherwise it will be shown on both work and leave rows. 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.
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 Bill Amount = Hours x Bill Rate. If entered from the timesheet then the Bill Rate will be computed as Bill Rate = Bill Amount / 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 Pay Amount = Hours x Pay Rate. If entered from the timesheet then the Pay Rate will be computed as Pay Rate = Pay Amount / 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.

Subtopics

Timesheet Asset Tracking

Timesheet Advanced Settings

Timesheet Submit Message

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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.

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Advanced Settings

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

Property	Description
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 Only". If you never record leave then you would set this to "Work Only".

Time Entry Mode	This determines whether the employee enters hours on their timesheet (Standard), or use some other mode to track their time:
	Standard: Standard time entry in which employees enter time in hours on their timesheet.
	Percent Time Entry: Employees enter their time as a percentage of the total time they worked during the timesheet period. Both work and leave time can be recorded. Just like standard time entry, time can be allocated as percentages against different projects and tasks. The system will convert percentages entered by the employee into actual hours, based on the employee's **Scheduled Hours Per Week** property in their employee profile (if not specified then 40 hours per week is assumed). The employee only sees percentages, but managers can review or report on both percentages and actual hours. **Note 1:** Only weekly, bi-weekly and quad-weekly timesheet periods are supported. This is because entered percentages must be converted to hours by the system, which is done using the employee's scheduled hours per week property. **Note 2:** Rounding is not supported with percent time entry - all percentages are manually entered and can be up to 2 decimal digits. Do not enable the Rounding Time Entry Rule as it may produce odd results. **Note 3:** To enforce that 100% of time is accounted for on an employee's timesheet you should enable the following 2 **Schedule Rules**: [**x**] Timesheet hours cannot be greater than scheduled hours [**x**] Timesheet hours cannot be less than scheduled hours See the Schedule Rules topic for more information.
	Presence/Absence Time Entry: Rather then entering hours, employees toggle checkboxes on their timesheet indicating which days they worked. They can have multiple rows per day or week to track work done on different projects or tasks.

Attendance Entry	If this option is checked then the Attendance Widget will be shown at the top of the timesheet (week view only), as well as on the crew timesheet (by adding an In-Out column). This option is only useful if you are not capturing start and finish times on the timesheet itself. Attendance entry times will be rounded according to the employee's policy if rounding is enabled (see the Time Entry Rules topic for more information). There are two attendance widget styles:

Single in/out/meal per day	Only one in and out time can be entered per day for each employee. You can specify whether a meal was taken by selecting the number of meal minutes from a menu, or by checking a checkbox if only one meal time is allowed.
Multiple in/outs (punches) per day	Multiple punches can be entered per day for each employee. Rather than selecting a meal from a menu or checkbox, the employee would punch out for a meal and punch back in when returning to work.

The following options can be set if the attendance entry widget is enabled:

Copy attendance hours down to timesheet	If checked then attendance hours will be carried down to the first row of the timesheet whenever attendance is changed.
Reject timesheet if different than timesheet hours	If checked then attendance hours must match timesheet hours before the timesheet can be submitted.

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Submit and Review Messages

You can create a custom message that the employee is presented with when they submit or review 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.
Review Message	The custom message to present to the employee upon timesheet review. Only employees with the "Can review my timesheet only" permission will see this message.

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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

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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.

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	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. 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. You can also add a "**Disable Rounding**" checkbox custom field to turn off rounding for an individual time entry.
Rounding Mode	How rounding is done, either Nearest, Round Up or Round Down. Nearest: 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. Round Up 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. Round Down 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.

Round punch-in to scheduled start time	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. 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. The employee's scheduled start and finish times are specified in their profile. See the Managing Employees topic for more information.
Round punch-out to scheduled finish time	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. 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. The employee's scheduled start and finish times are specified in their profile. See the Managing Employees topic for more information.

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 time of day. 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 time of day. 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.
Disable Rounding	Checkbox	This is **optional** and is only needed if you want to be able to turn off rounding on a per-entry basis on a timesheet. After creating this custom field you can add the checkbox to the time entry details, giving you the option to turn off or disable rounding for an individual time entry. The "disable rounding" checkbox will only work if you also have the "Actual Start" and "Actual Finish" time fields, describe above. Note that you must create this field exactly as named, "Disable Rounding", in order to create the expected underlying database field (t_timeentry.xdisablerounding). 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.	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 Timesheetalready 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.

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.

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. |

Autofill	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. 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.

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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.

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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	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. 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. 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.
Weekly work hours over	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. 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. 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.

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Period work hours over	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.

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.

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. |
| Accrual Rate | 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. |

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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	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: *Hourly - For Every Hour Worked* 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. *Yearly - Employee anniversary* 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: March 28, 2012 to March 27, 2013 March 28, 2013 to March 27, 2014 etc. The accrual would occur before midnight on March 27 of each period for this employee.

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	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. 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.
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

Rollover Period	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:
	Yearly - Employee anniversary
	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:
	March 28, 2012 to March 27, 2013 March 28, 2013 to March 27, 2014 etc.
	The rollover would occur before midnight on March 27 of each period for this employee.
Rollover/accrual sequencing	This controls whether the rollover runs *immediately before* or *immediately after* an accrual that would fall on the same date.
	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 *just before* the accrual, otherwise the employee would start the new year with no balance.
	However, if your accrual period is monthly, you might prefer the rollover to run *just after* the accrual, essentially acting as a sort of cap.
	How the sequencing of accrual and rollover is handled varies, so you will have to set this based on your organization's requirements.
Move Excess Rollover Hours To	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.
Forecast only	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).

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

Double Time Rules:
[x] Daily work hours over  [12.00]
[x] Weekly work hours over [60.00]

Consecutive Days Rules:
[x] 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.

In addition to affecting how OT is calculated, employees with 9/80 Over Time Rules enabled will also see changes to the following:
- Company holidays that fall on the Friday off will have not hours pushed onto timesheets for that Friday.
- Leave requests that fall on the Friday off will not have any hours pushed onto timesheets for that Friday.
- The Scheduled Work Days in the employee's profile is ignored if they are using the 9/80 Over Time Rules.

> 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. Note that you can include certain types of leave hours as "regular time" with respect to reaching the maximum. For example, you might want Holiday hours to contribute to the over time calculation. See the Leave property below for more information.
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. This defines the compressed week - any hours recorded beyond this will be counted for the next week (whether work or leave). The selected day is usually taken off on the second week of a two week cycle. Note: This only applies to employees entering start/finish times on their timesheets.
Day Off	The 'Friday' in the two week cycle that is considered the day off. Typically this would be the 'Friday' in the 2nd week. In cases where your employees all have the same biweekly pay cycle, but you don't want to have everyone off on the same Friday, you would create 2 policies: one with the 1st Friday off and another one with the 2nd Friday off. You would then assign the appropriate policy to employees that work those schedules.

Holiday Work	If an employee records hours on a day with holiday hours then that day is considered holiday work. If you pay employees a different rate for those hours then you may prefer to assign those holiday hours to another pay code of your choosing, for example "Holiday Work". The list of pay codes available is limited to work pay codes. See the Pay Codes help topic for information on creating new pay codes. Depending on how payroll is processed, you might want to avoid double-payment of "holiday work" hours and "holiday" hours. Consider an employee timesheet that has 9 hours of Holiday and 2 hours of work on Tuesday, for a total of 11 hours. Rather than sending 11 hours to payroll you can send 2 hours of holiday work and 7 hours of holiday for a total of 9 hours by using the Holiday Backout option. You can back out an equivalent amount of holiday hours for each hour of holiday work. This is configured in the Options dialog (see below).
Callout Work	Callout work is for employees who may be called to work at remote locations periodically to do "callout" work - work that is outside of the normal day-to-day work done at their normal location. This work could occur during normal work hours, or after work hours. If you pay employees a different rate for those hours then you may prefer to assign those callout hours to another pay code of your choosing, for example "Callout Work". The list of pay codes available is limited to work pay codes. See the Pay Codes help topic for information on creating new pay codes. In order to specify that the time entered on the timesheet is callout work you will need to define a timesheet template **custom field** named "**Callout**", then assign this custom field to the appropriate employee timesheet templates. The type of the custom field must be either "Check Box" or "List". You would normally use a check box, but might use a list if you have more than one type of callout work for the employee to select. Note: The custom field MUST be named exactly "Callout" (without the quotes, case-sensitive) the first time you create it (in order for the database column name to be created correctly), but once you save the custom field you can afterwards edit it and rename it to anything you prefer (the database column name will not change).
Leave	You can optionally include specific leave pay codes in the overtime computation. For instance, you might want holiday hours to be considered as work for the purpose of computing overtime. For example, if you add Holiday to the list of leave that contributes to overtime then working 41 hours up to the Friday midpoint would give you one hour of overtime whether all of those hours were work or some were work and some were Holiday. You would not generally add Holiday to the list of leave that contribute to overtime if you are already specifying the Holiday Work rule, above.

If you click the "Options" link in the lower-right corner of the 9/80 Over Time Rules page you can specify the following optional properties:

Rule	Description
Holiday Overtime	If the employee would have received overtime hours during the day of the holiday for the work done, you can optionally have those overtime hours placed in the specified pay code, for example "Holiday Work OT". The list of pay codes available is limited to work pay codes. See the Pay Codes help topic for information on creating new pay codes.
Holiday Backout	Depending on how payroll is processed, you might want to avoid double-payment of "holiday work" hours and "holiday" hours. Consider an employee timesheet that has 9 hours of Holiday and 2 hours of work on Tuesday, for a total of 11 hours. Rather than sending 11 hours to payroll you can send 2 hours of holiday work and 7 hours of holiday for a total of 9 hours by using the Holiday Backout option. You can back out an equivalent amount of holiday hours for each hour of holiday work. You can specify two ways that holiday hour deductions are processed: 1. Deduct one hour of Holiday for every hour of work that occurs on the same day. 2. Deduct one hour of Holiday for every hour of work that occurs on the same day, as long as the work was done during scheduled work time. The scheduled work time is specified by the scheduled start/finish times in the employee's profile.
Callout Mapping	If you are using a List custom field instead of a Check Box custom field then you need to specify the pay code for each list item that you want the callout hours to go to. For example, a callout with two list choices might look like this: ``` Callout List Item | Pay Code ------------------------------- Callout | CO Continue From Callout | COC ```
Callout Minimum	You may want to specify a minimum number of hours an employee is granted when doing callout work. For instance, you might grant employees a minimum of 4 hours of callout work even if they only record 1 hour of actual work. This minimum is only granted if the callout occurred outside of normal work hours (as specified in by the employee's scheduled start/finish time in their employee profile). You can extend what is considered normal work hours by specifying the number of minutes before/after their schedule that is still considered normal work hours. For example, if you specify 120 minutes (2 hours) before/after as normal hours, then an employee with a start/finish of 8AM-5PM would really have a normal work hour schedule of 6AM-7PM. Callout hours starting on 6AM or later and starting before 7PM would not be granted the minimum hours.

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Exempt Mode	Cap regular time to 40 hours per week with no overtime. This is intended for salaried employees who work a compressed schedule. They can record as many hours as they worked, even if over the standard 9/80 schedule, but will receive no overtime.
Test Mode	Unlike other less complex rules, 9/80 Over Time rules run only when a timesheet is submitted. Check this option to run 9/80 Over Time rules on save, too. This will stay active for a maximum of 7 days then turn itself off automatically, to avoid adversely affecting system performance.

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	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.
Shift Hours Depend On	This property determines how a work time entry has its hours associated with the appropriate work shift. The possible options are: 1. Each Shift Worked 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. 2. Largest Shift Worked 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. 3. First Shift Worked 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.

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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.

<u>Calculation Notes</u>

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.

<u>Missed Meal Premium Example</u>

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: Premium = M - ((E - M) x 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:

Premium = 12 - ((10 - 12) * 8) = 28

The employee would gain an additional $28.00 pay.

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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	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. 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.
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	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. 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.
In-late rule	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.
Out-early rule	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.
Too-few-hours rule	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. 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. 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.
Too-long-meal-break rule	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. 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.

The following global options can be set:

Property	Description
Default reporting period	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". 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.

Minimum/maximum total points allowed in period	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.
	
	As an example, suppose an employee had accumulated the following absence points over the current year, and no minimum total points were specified:
	
	`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`
	
	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:
	
	`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`
	
	As you can see, the total points is now 2.00, but the individual points entries were not altered.

| Warning Threshold | The number of points beyond which you will be suggested to give a warning to the employee. For example, if you specify 5.0 points as the warning threshold then any employee with more than 5.0 points will be marked as needing review. If you wanted 5.0 to trigger a warning then your threshold should be set to 4.99.

Warnings will not be automatically sent to employees. Instead, when an employee's points are greater than the warning threshold then the "Warning Action" column on the Absence Points dashboard will show "Review", indicating the employee may need to be warned by their manager. If warned then the manager would then use the Absence Points dashboard to record the event. |

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	Multiple types of authentication are supported through a pluggable authentication architecture. The following authentication types are provided in the base product package: • Standard Authentication • LDAP/Active Directory Authentication • SAML 2.0 Authentication • Okta Authentication • OneLogin Authentication • Ping Identity Authentication Refer to the appropriate topics below for more information on configuring these authentication types.

Standard Authentication

Standard authentication provides basic login management and strong password support from with 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.

Other Authentication Types

LDAP/Active Directory Authentication
SAML Authentication
Okta Authentication
OneLogin Authentication
Ping Identity Authentication

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.

General 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	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:

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.

Note that Leave Requests do not have any sub-permissions for Manage, unlike many other objects in the system. The 'Can Manage' permission effectively gives the user the ability to view leave requests in a read-only format on the Leave Requests tab. You might use this permission if you want to allow some employees to see leave requests for planning purposes, but prefer other employees do the approvals.

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.

Timesheet Special Permissions

There are some special timesheet permissions:

Permission	Description
Can view my timesheet	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: 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	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. Note that this permission also works in conjunction with the "Can review my timesheet only" permission (see below). If both are checked than the employee will be able to review their timesheet in a read-only manner, and will be able to "undo" and change their review.
Can copy my previous timesheet hours	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. 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.
Can punch from time clock device only	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.

Can edit my punches	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: • 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. 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.
Can review my timesheet only	This permission allows employees to see their timesheets in a read-only view, and gives them the ability to review the time entered for them. They can then accept the timesheet or report a problem. This is useful for employees working in crews where a site manager enters time for them. Timesheet reviews can only be done by the employee, and must happen BEFORE the timesheet is submitted (locked). The review is stored in the timesheet notes field. Managers can see the reviews from the Timesheets and Approvals tabs with clear icons indicating whether the employee accepted the timesheet or reported a problem. Note 1: The employee review icons are only shown for unsubmitted (unlocked) timesheets. Once submitted, the review icons are no longer shown (as the timesheet is considered processed), but the review information is still available in the timesheet notes field. Note 2: If you want to allow the employee the ability to "undo" their review, check the "Can undo submit of my timesheet" permission (see above). They will be able to undo and change their review until the timesheet is submitted (locked) by their manager. However, they will not be allowed to undo the submit of the timesheet, as the review permission only allows read-only access to the timesheet.

Leave Request Special Permissions

There are some special leave request permissions:

Permission	Description
Can create my leave requests	Employees with this permission enabled (meaning they have this permission enabled for the permission level in their employee profile) will be able to create new leave requests for pay codes they are allowed to access (based on their pay code 'Can view' permission). They will also be able to delete leave requests they created as long as they have not been marked as approved. To delete an approved leave request it must first be unapproved by an approver.

Can create for approvees	Employees with this permission enabled (meaning they have this permission enabled for the permission level in their employee profile) will be able to create (and delete) leave requests for employees. The list of employees they can do this for depends on their 'Can approve' leave request permission, as well as whether they are assigned as approvers to any employees in their employee profiles. Note that this permission requires the 'Can approve' permission be enabled as a pre-requisite.

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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 mulitple 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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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. Errors are logged to the System Event Log, and can be view with the Reports > System Event Log report. For self-hosted systems you can also view detailed information in the log files 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.

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SAML 2.0 Authentication

SAML 2.0 allows you to have single-sign-on (SSO) using a SAML 2.0 compliant identity provider.

The first step to implementing SSO with Pacific Timesheet is to create a SAML 2.0 application in your identity provider. You will need to configure where to go to in the Pacific Timesheet application. The will often be called the Single Sign On URL, the Recipient URL or the Destination URL. Enter your Pacific Timesheet URL in its full format, e.g.

https://xyz.pacifictimesheet.com/timesheet/home.do

Replace the 'xyz' portion above with the subdomain you use.

> Troubleshooting Note: Make sure compression is turned on for any SAML 2.0 configuration. Pacific Timesheet expects the SAML data to be compressed.

Once you have created the Pacific Timesheet application icon you must then configure the security settings in Pacific Timesheet. First, find the values you need to enter into Pacific Timesheet by going to your identity provides Admin dashboard and finding the SSO settings for the application created above. Enter the following information into Pacific Timesheet on the System > Security page:

Property	Description
Name	This is the name used in the login button on the Pacific Timesheet login page.
Issuer URL	The value from the identity provider, for example: https://app.onelogin.com/saml/metadata/439734
SAML 2.0 Endpoint (HTTP)	The value from identity provider, for example: https://app.onelogin.com/trust/saml2/http-post/sso/439734
Certificate	The identity provider's X.509 security certificate. You can specify both a **primary** certificate, and optionally a **secondary** certificate. When a login request is authenticated the primary certificate is used first, and if that fails then the secondary certificate will be used. You would typically provide a secondary certificate a few days or weeks before the primary one expires to ensure there is no loss of access to the application when the primary certificate expires. Once the primary certificate is fully expired you can replace it with the secondary certificate at your earliest convenience, then clear the secondary certificate field. Note that the X.509 certificate should be in PEM format, meaning it should start with the header line -----BEGIN CERTIFICATE----- and end with the footer line -----END CERTIFICATE-----
Logging	Check this option to help troubleshoot authentication failures. Errors are logged to the System Event Log, and can be view with the Reports > System Event Log report. For self-hosted systems you can also view detailed information in the log files located in the <PacificTimesheet>/tomcat/logs directory.

When you use an identity provider to connect to Pacific Timesheet, you will need a corresponding employee account in Pacific Timesheet. The identity provider's account information (be it email address, login, etc.) will be used to find a corresponding Pacific Timesheet account. The match will be made against the Pacific Timesheet account's login

name, employee ID or email address, in that order.

Note: Even if SSO is enabled you can allow some employees to log in using Pacific Timesheet's standard authentication (user name and password). On the login page the employee can choose either to log in with the standard user name and password, or use the configured identity provider's SSO option. This allows you to have Pacific Timesheet accounts that do not use the configured identity provider, such as the 'admin' account, or client approver accounts, still able to log in with a user name and password.

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Okta Authentication

Okta authentication allows you to have single-sign-on (SSO) using the Okta SAML 2.0 identity provider.

The first step to setting up SSO with Okta is to create a new application icon in Okta named Pacific Timesheet. Search the catalog for Pacific Timesheet and use that to create the new application. Make sure you enter your subdomain, e.g. "xyz". This comes from your Pacific Timesheet application URL, e.g. https://xyz.pacifictimesheet.com.

Troubleshooting Note: Make sure "Request Compression" is set to "Compressed" in your Okta SAML configuration. Pacific Timesheet expects the SAML data to be compressed.

Once you have created the Pacific Timesheet application icon in Okta you must then configure the security settings in Pacific Timesheet. First, find the values you need to enter into Pacific Timesheet by going to the Okta Admin > Applications page. Locate and click the Pacific Timesheet application you created above, then go to the Sign On panel. Click the View Setup Instructions and enter the following information into Pacific Timesheet on the System > Security page:

Property	Description
Name	This is the name used in the login button on the Pacific Timesheet login page.
Identity Provider SSO URL	The value from Okta, for example: https://xyz.okta.com/app/xyz/exk3ycblt53P0Gcry0h7
Identity Provider Issuer	The value from Okta, for example: https://www.okta.com/exk3ycblt53P0Gcry0h7
Certificate	The Okta X.509 security certificate. You can specify both a **primary** certificate, and optionally a **secondary** certificate. When a login request is authenticated the primary certificate is used first, and if that fails then the secondary certificate will be used. You would typically provide a secondary certificate a few days or weeks before the primary one expires to ensure there is no loss of access to the application when the primary certificate expires. Once the primary certificate is fully expired you can replace it with the secondary certificate at your earliest convenience, then clear the secondary certificate field. Note that the X.509 certificate should be in PEM format, meaning it should start with the header line -----BEGIN CERTIFICATE----- and end with the footer line -----END CERTIFICATE-----
Logging	Check this option to help troubleshoot authentication failures. Errors are logged to the System Event Log, and can be view with the Reports > System Event Log report. For self-hosted systems you can also view detailed information in the log files located in the <PacificTimesheet>/tomcat/logs directory.

When you use an identity provider to connect to Pacific Timesheet, you will need a corresponding employee account in Pacific Timesheet. The identity provider's account information (be it email address, login, etc.) will be used to find a corresponding Pacific Timesheet account. The match will be made against the Pacific Timesheet account's login name, employee ID or email address, in that order.

Note: Even if SSO is enabled you can allow some employees to log in using Pacific Timesheet's standard authentication (user name and password). On the login page the employee can choose either to log in with the standard user name and password, or use the configured identity provider's SSO option. This allows you to have Pacific Timesheet accounts that do not use the configured identity provider, such as the 'admin' account, or client approver accounts, still able to log in with a user name and password.

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One Login Authentication

One Login authentication allows you to have single-sign-on (SSO) using the One Login SAML 2.0 identity provider.

The first step to setting up SSO with OneLogin is to create a new application icon in OneLogin named Pacific Timesheet. Search the catalog for Pacific Timesheet and use that to create the new application. Make sure you enter your subdomain, e.g. "xyz". This comes from your Pacific Timesheet application URL, e.g. https://xyz.pacifictimesheet.com.

Once you have created the Pacific Timesheet application icon in OneLogin you must then configure the security settings in Pacific Timesheet. First, find the values you need to enter into Pacific Timesheet by going to the OneLogin > Apps page. Locate and click the Pacific Timesheet application you created above, then go to the SSO panel. Enter the following information into Pacific Timesheet on the System > Security page:

Property	Description
Name	This is the name used in the login button on the Pacific Timesheet login page.
Issuer URL	The value from OneLogin, for example: https://app.onelogin.com/saml/metadata/439734
SAML 2.0 Endpoint (HTTP)	The value from OneLogin, for example: https://xyz.onelogin.com/trust/saml2/http-post/sso/439734
Certificate	The OneLogin X.509 security certificate. You can specify both a **primary** certificate, and optionally a **secondary** certificate. When a login request is authenticated the primary certificate is used first, and if that fails then the secondary certificate will be used. You would typically provide a secondary certificate a few days or weeks before the primary one expires to ensure there is no loss of access to the application when the primary certificate expires. Once the primary certificate is fully expired you can replace it with the secondary certificate at your earliest convenience, then clear the secondary certificate field. Note that the X.509 certificate should be in PEM format, meaning it should start with the header line -----BEGIN CERTIFICATE----- and end with the footer line -----END CERTIFICATE-----
Logging	Check this option to help troubleshoot authentication failures. Errors are logged to the System Event Log, and can be view with the Reports > System Event Log report. For self-hosted systems you can also view detailed information in the log files located in the <PacificTimesheet>/tomcat/logs directory.

When you use an identity provider to connect to Pacific Timesheet, you will need a corresponding employee account in Pacific Timesheet. The identity provider's account information (be it email address, login, etc.) will be used to find a corresponding Pacific Timesheet account. The match will be made against the Pacific Timesheet account's login name, employee ID or email address, in that order.

Note: Even if SSO is enabled you can allow some employees to log in using Pacific Timesheet's standard authentication (user name and password). On the login page the employee can choose either to log in with the standard user name and password, or use the configured identity provider's SSO option. This allows you to have Pacific Timesheet accounts that do not use the configured identity provider, such as the 'admin' account, or client approver accounts, still able to log in with a user name and password.

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Ping Identity Authentication

Ping Identity authentication allows you to have single-sign-on (SSO) using the Ping Identity SAML 2.0 identity provider.

The first step to setting up SSO with Ping Identity is to create a new application icon in Ping Identity named Pacific Timesheet. Log in as an administrator to Ping Identity, click the Add Application button, and search the catalog for Pacific Timesheet. Use that to create a new application, leaving all values at their default except for **ACS URL** and **SP entityId**. For these two properties make sure to replace the **${Customer's subdomain}** expression with your Pacific Timesheet subdomain. For example, if your Pacific Timesheet URL is https://xyz.pacifictimesheet.com, then your subdomain is 'xyz' and the values would be:

```
ACS URL     -> https://xyz.pacifictimesheet.com/timesheet/home.do
SP entityId -> https://xyz.pacifictimesheet.com/timesheet/home.do
```

Once you have created the Pacific Timesheet application icon in Ping Identity you must then configure the security settings in Pacific Timesheet. First, find the values you need to enter into Pacific Timesheet by going to the Ping Identity Admin > Applications page. Locate and click the Pacific Timesheet application you created above to load the configuration parameters. Enter the following values into Pacific Timesheet:

Property	Description
Name	This is the name used in the login button on the Pacific Timesheet login page.
Initiate SSO URL	The value from Ping Identity, for example: https://sso.connect.pingidentity.com/sso/sp/initsso?saasid=b04a3a23-0ccf-b8a5-b4d2f7f4f086
SSO Relay State	The value from Ping Identity, for example: https://pingone.com/1.0/b04a3a23-0ccf-b8a5-b4d2f7f4f086
Certificate	The Ping Identity X.509 security certificate. You can specify both a **primary** certificate, and optionally a **secondary** certificate. When a login request is authenticated the primary certificate is used first, and if that fails then the secondary certificate will be used. You would typically provide a secondary certificate a few days or weeks before the primary one expires to ensure there is no loss of access to the application when the primary certificate expires. Once the primary certificate is fully expired you can replace it with the secondary certificate at your earliest convenience, then clear the secondary certificate field. Note that the X.509 certificate should be in PEM format, meaning it should start with the header line -----BEGIN CERTIFICATE----- and end with the footer line -----END CERTIFICATE-----
Logging	Check this option to help troubleshoot authentication failures. Errors are logged to the System Event Log, and can be view with the Reports > System Event Log report. For self-hosted systems you can also view detailed information in the log files located in the <PacificTimesheet>/tomcat/logs directory.

When you use an identity provider to connect to Pacific Timesheet, you will need a corresponding employee account in Pacific Timesheet. The identity provider's account information (be it email address, login, etc.) will be used to find a corresponding Pacific Timesheet account. The match will be made against the Pacific Timesheet account's login name, employee ID or email address, in that order.

Note: Even if SSO is enabled you can allow some employees to log in using Pacific Timesheet's standard authentication (user name and password). On the login page the employee can choose either to log in with the standard user name and password, or use the configured identity provider's SSO option. This allows you to have Pacific Timesheet accounts that do not use the configured identity provider, such as the 'admin' account, or client approver accounts, still able to log in with a user name and password.

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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 email notices can be sent:

Notice	Description
Employee Late	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	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	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	The Timesheet Rejected notice is sent to employees immediately upon their timesheet being rejected.
Timesheet Submitted	The Timesheet Submitted notice is sent to the employee's primary approver immediately upon submission of their timesheet.
Timesheet Approval Due	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	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	The Request Approved notice is sent to request owners immediately upon their leave request being approved.
Request Rejected	The Request Rejected notice is sent to request owners immediately upon their leave request being rejected.

Request Submitted	The Request Submitted notice is sent to the employee's primary approver immediately upon submission of a leave request.
Request Approval Due	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	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	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).
Asset Sheet Approved	The Asset Sheet Approved notice is sent to asset (e.g. expense) sheet owners immediately upon their sheet being approved.
Asset Sheet Rejected	The Asset Sheet Rejected notice is sent to asset (e.g. expense) sheet owners immediately upon their sheet being rejected.
Asset Sheet Submitted	The Asset Sheet Submitted notice is sent to the employee's primary approver immediately upon submission of an asset (e.g. expense) sheet.
Asset Sheet Approval Due	The Asset Sheet Approval Due notice is sent to primary approvers who have asset (e.g. expense) sheets waiting their approval. This is sent at a date relative to the date of submission of the sheet. You can optionally CC the employee's backup approver(s) using the CC property.
Asset Sheet Approval Late	Like the Asset Sheet Approval Due notice, the Asset Sheet Approval Late notice is sent to primary approvers who have asset (e.g. expense) sheets waiting their approval. This is sent at a date relative to the date of submission of the sheet. You can optionally CC the employee's backup approver(s) using the CC property. The Asset Sheet 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 sheets that are late for approval have been approved or rejected.

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. If using HTML then the body must be enclosed by <html> and </html> tags. The body text can be up to 4000 characters. Both the title and body can contain the following substitution variables:

Substitution Variables		
Variable	**Description**	**Notes**
${Crew.name}	The name of the crew or group.	For Crew notices only.
${Crew.url}	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.	For Crew notices only.
${Request.approve.url}	Request owner's full name.	For Request notices only.
${Request.date}	Request date range, as entered by user.	For Request notices only.
${Request.description}	Request description, as entered by the employee.	For Request notices only.
${Request.rejecter}	The manager who rejected the request.	For Request Rejected notice only.
${Request.rejectMessage}	Request rejection message, in request is rejected.	For Request Rejected notice only.
${Request.type}	Request type, for example "Vacation".	For Request notices only.
${Request.user.fullName}	Request owner's full name.	For Request notices only.
${System.applicationName}	Application Name, as specified in the Branding page.	For all notices.
${System.companyName}	Company Name, as specified in the Branding page.	For all notices.
${System.currentDate}	Current date	For all notices.
${System.currentDateTime}	Current date and time	For all notices.
${System.currentTime}	Current time	For all notices.
${System.url}	Address of login page. This value is based on the Application URL system property, which can be modified on the System Settings page.	For all notices.
${TimeSheet.approve.url}	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.	For Timesheet notices only.
${TimeSheet.period}	Timesheet period	For Timesheet notices only.
${TimeSheet.rejecter}	The manager who rejected the timesheet.	For Timesheet Rejected and Crew Timesheet Rejected notices only.

${TimeSheet.rejectMessage}	The timesheet rejection reason.	For Timesheet Rejected notice only.
${TimeSheet.url}	Address of 'My Timesheet' page. This value is based on the Application URL system property, which can be modified on the System Settings page.	For Timesheet notices only.
${TimeSheet.user.fullName}	Timesheet owner's full name.	For Timesheet notices only.
${User.fullName}	Employee full name, in FIRSTNAME LASTNAME format.	For all applicable notices.
${User.list}	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.	For all applicable notices.
${User.login}	Employee login name	For all applicable notices.
${User.scheduledIn}	Employee's scheduled start time.	For Employee Late notice only.
${User.actualIn}	Employee's actual start time.	For Employee Late notice only.
${Sheet.approve.url}	Address of the Asset Sheet approval page. This value is based on the Application URL system property, which can be modified on the System Settings page.	For Asset Sheet notices only.
${Sheet.date}	Asset sheet date/date range, as entered by the employee.	For Asset Sheet notices only.
${Sheet.description}	Asset sheet description, as entered by the employee.	For Asset Sheet notices only.
${Sheet.rejecter}	The manager who rejected the asset sheet.	For Asset Sheet Rejected notice only.
${Sheet.rejectMessage}	Asset sheet rejection message, if any.	For Asset Sheet Rejected notice only.
${Sheet.type}	Asset sheet type, e.g. "Expense".	For Asset Sheet notices only.
${Sheet.user.fullName}	Asset sheet owner's full name.	For Asset Sheet notices only.

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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.

For Oracle Database 12c or later the login name must begin with the three characters 'C##' or 'c##' (without the quotes).

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.

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Custom Fields

You can customize many objects in the application by adding new data fields. Custom fields 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.

Note: When saving a new custom field for the first time the system will create a database column to hold values based on the name you enter. You can rename the custom field at any time after this, but the internal database column name will not change (in order to prevent custom SQL reports from not working). Therefore, if you are required to create a custom field with a specific name (for example, for Absence Points Rules) you must enter it exactly as specified the first time (including the proper upper/lower case lettering).

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. The value can be entered as an edit box or as a drop-down list.
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. Supported image file formats are PNG, GIF and JPG.
List	A text field allowing the selection of one or more choices from a list of choices. Note that the List type is only for lists of text items (Number and Currency type fields can also have lists but those are configured directly from their properties page).
Number	A numeric value, allowing an arbitrary number of decimal places of precision. The value can be entered as an edit box or as a drop-down list.
Text	A text value, entered via an edit box.
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.

Input Type

The type of input widget used, either an edit box or a drop-down list.

Minimum Value

If the **Input Type** is set to **Edit Box**, then you can specify the minimum value that can be entered. Leave this blank if there is no minimum value.

Maximum Value

If the **Input Type** is set to **Edit Box**, then you can specify the maximum value that can be entered. Leave this blank if there is no maximum value.

List Choices

If the **Input Type** is set to **Drop Down List**, then you can specify the numbers in the list. Enter each number on a separate row by pressing the enter key, for example:

```
1.00
2.00
3.00
...
```

The number format is entered in the locale of the administrator making the changes, but when the list is presented to employees the numbers will be reformatted as appropriate for their locale, as well as have the currency symbol added. For example, if the employee has the French locale and the currency was set to EUR then they would see the list formatted as follows:

```
€1,00
€2,00
€3,00
...
```

Image

Image custom fields allow you to upload an image, which will be presented as a smaller thumbnail that can be clicked to view at its native or full resolution. Supported image file formats are PNG, GIF and JPG.

Thumbnail Width
Thumbnail Height

The default thumbnail size if not specified is 500x500 pixels. You can specify your own size here, in pixels. Images whose native size is smaller than this will not be scaled up, but images larger than this will be scaled down, so the thumbnail size represents the maximum size shown to the user. The original image can always be viewed by clicking on the thumbnail.

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.

Input Type

The type of input widget used, either an edit box or a drop-down list.

Minimum Value

If the **Input Type** is set to **Edit Box**, then you can specify the minimum value that can be entered. Leave this blank if there is no minimum value.

Maximum Value

If the **Input Type** is set to **Edit Box**, then you can specify the maximum value that can be entered. Leave this blank if there is no maximum value.

List Choices

If the **Input Type** is set to **Drop Down List**, then you can specify the numbers in the list. Enter each number on a separate row by pressing the enter key, for example:

```
1.00
2.00
3.00
...
```

The number format is entered in the locale of the administrator making the changes, but when the list is presented to employees the numbers will be reformatted as appropriate for their locale. For example, if the employee has the French locale they would see the list formatted as follows:

```
1,00
2,00
```

```
3,00
...
```

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><tr><td>Value</td><td>Description</td></tr><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></table>	Text
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><tr><td>Value</td><td>Description</td></tr><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></table>	Text
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

| 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 asset. | Text (2000 chars max) |

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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: | 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
Type	The asset type (name or ID) for this asset class. If there are multiple asset types defined then this field is required.	Text

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Asset Entry Fields

The following fields can be imported/exported.

Note: When **importing**, the header field name must match the value below exactly in order to be recognized.

Note: When **exporting**, you can combine fields using custom export field expressions. See the Expression Fields topic for more information.

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)

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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 exceptioin 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

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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: | 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
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)

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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: | 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
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	This controls whether rows and hours are carried forward from the previous timesheet to new timesheets. Possible values are: <table><tr><td>Value</td><td>Description</td></tr><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></table>	Text
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). Depending upon your integration needs, you may want to narrow the scope of which groups are set in the import file. By default, if the Groups column is present, the user is removed from ALL groups and placed in the group(s) specified in the import file. If you want to only set their permission groups and not alter reporting groups or crews they are in, you can append the ":P" suffix to the column header: "Groups:P". The following suffixes can be used:	Text

Suffix	Description
Groups:P	Takes the user out of all permission groups (groups that do not have the Reporting Group or Crew type checked) and adds them to the groups specified in the import file. If no groups are specified in the import file then they will belong to no permission groups. This will not remove the user from any reporting or crew groups they may currently be members of.
Groups:NC	Takes the user out of any groups that are not crew groups, and adds them to the groups in the import file. In other words, this suffix will ensure the list of crews a user is a member of will not be changed.

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)

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Importing Expense Entry Data

You have the option to import employee company or personal credit card expense entry data into the system. The first step is to prepare a data file that matches the following specification in a .csv format. When importing expense entry data rows, you want to sort each employee's expense data by employee name, then date. During the import, the system will dynamically create a new Expense Sheet ID for the employee's expense entries being imported.

> **Note:** When **importing**, the header field name must match the value below exactly in order to be recognized.

> **Note:** When **exporting**, you can combine fields using custom export field expressions. See the Expression Fields topic for more information.

Field	Description	Format
Date	The date this expense was incurred.	Date
ID	The expense entry ID. This field is not required, but if present and the value is not blank then it must be unique for all expense entries, regardless of the expense 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 expense entry.	Text (255 chars max)
Expense	The expense (name or ID) type used for this entry. If specified then the expense's class and units will be assumed for this entry.	Text
Type	The expense type (name or ID) for this entry. The expense type of the expense will be used if this is not specified. If no expense specified then this is required when adding a new expense entry and there are more than one expense types defined.	Text
Class	The expense class (name or ID) for this entry. This is optional and will be set to the value for the Expense 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 Expense if not specified.	Text
Quantity	The number or quantity of units used for this entry.	Number
Unit Amount	The cost per unit of measure for this expense entry. The cost is the amount you paid for this expense. This is optional and will be set to the value for the Expense if not specified.	Number

Amount	The total cost for this expense entry. This is optional and if not specified will be computed as Quantity x Unit Cost.	Number
Unit Bill Amount	The price per unit of measure for this expense. The price is the amount you charge for this expense. This is optional and will be set to the value for the Expense if not specified.	Number
Bill Amount	The total price for this expense entry. This is optional and if not specified will be computed as Quantity x Unit Price.	Number
Employee	The employee (name or ID) this expense 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 expense 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 expense entry is to be associated with.	Text
Project Group	The project group (name or ID) this expense entry is to be associated with.	Text
Project	The project (name or ID) this expense entry is to be associated with.	Text
Task Group	The task group (name or ID) this expense entry is to be associated with.	Text
Task	The task (name or ID) this expense entry is to be associated with.	Text
Notes	Notes about this expense entry.	Text (2000 chars max)
Sheet.ID	The ID of the expense sheet. If present when importing then it will be used to locate an existing sheet and attach this entry to it. If not found, and the system is generating the ID, then an error will be generated.	Text (80 chars max)
Sheet.Start Date	The start date of the expense sheet. If present when importing, and there is no Sheet.ID value, then it will be used to locate an existing sheet and attach this entry to it. If not found then a new sheet will be created.	Date
Sheet.End Date	The ending date of the expense sheet.	Date
Sheet.Description	The sheet description.	Text (255 chars max)
Sheet.Notes	Any extra notes entered for the sheet.	Text (2000 chars max)

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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: | 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
Type	The type of group this is, where P = permission group, R = reporting group and C = crew. If a group is more than one type then each type will be separated by a carriage return (also called a "hard" carriage return in Excel, entered using ALT+ENTER). When importing into Pacific Timesheet you can separate values with a "hard" carriage return, or you can use the semi-colon character ';'. Note that reporting group and crew can be renamed on the System > General > Terminology page, but the values in the CSV file, P, R and C, do not change.	Text
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)

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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 exceptioin 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

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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: | 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
Planned Start Date	Planned project start date.	Date
Planned Finished Date	Planned project finish or end date.	Date
Planned 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	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.	Text (2000 chars max)

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Project Dashboard Fields

You can import and export the configuration of your project dashboards very easily using the CSV format specified here.

> **Note:** When importing you can specify whether to add/update records to a project dashboard, or to set the list of records to match exactly what is in the import file. To do this you use an import file **directive** of the form:
>
> #project-dashboard:update
>
> or
>
> #project-dashboard:set
>
> The directive must be the first line of the import file and must be the only text on that line. The import file header should immediately follow it.

When importing new dashboard items the Actual Work field will be updated for each new item. This can be time consuming for large systems so you may want to wait to do your project dashboard imports during off-peak times if you have large import files (more than 100 records).

The following fields can be exported/imported:

Field	Description	Format
Position	The position or row number of the dashboard item, from 1. This is optional for importing - if you omit this column then the position of each item will be automatically computed based on the order of the records in the import file.	Integer (from 1)
Project	The name of the project for this dashboard item. When importing dashboard records either this or the Project.ID value is required.	Text (80 chars max)
Project.ID	The ID of the project for this dashboard item. When importing dashboard records either this or the Project (name) value is required.	Text (80 chars max)
Task Group	The name of the task group for this dashboard item. Either this or the Task Group.ID can be specified. Both Task Group and Task are optional, but both WBS levels cannot be blank (a dashboard item cannot have a blank task group and task).	Text (80 chars max)
Task Group.ID	The ID of the task group for this dashboard item. Either this or the Task Group (name) can be specified. Both Task Group and Task are optional, but both WBS levels cannot be blank (a dashboard item cannot have a blank task group and task).	Text (80 chars max)

Task	The name of the task for this dashboard item. Either this or the Task.ID can be specified. Both Task Group and Task are optional, but both WBS levels cannot be blank (a dashboard item cannot have a blank task group and task).	Text (80 chars max)
Task.ID	The ID of the task for this dashboard item. Either this or the Task (name) can be specified. Both Task Group and Task are optional, but both WBS levels cannot be blank (a dashboard item cannot have a blank task group and task).	Text (80 chars max)
Status	The status or progress of this dashboard item, e.g. "Started", or "On Hold". The values for this can be configured by editing any project dashboard and clicking the "Options" link on that page.	Text (80 chars max)
Planned Start Date	Planned dashboard item start date.	Date
Planned Finished Date	Planned dashboard item finish or end date.	Date
Planned Work	Planned number of hours/days to complete this dashboard item. You can specify whether the units are hours or days from the Projects > Project Options page.	Number
Actual Start Date	Actual dashboard item start date.	Date
Actual Finished Date	Actual dashboard item finish or end date.	Date
Actual Work	The actual number of hours/days recorded against this dashboard item. This value is exported, but ignored on import as the system automatically updates this value nightly (or when you choose 'Refresh' from the tools menu on a project dashboard). You can specify whether the units are hours or days from the Projects > Project Options page. Note that when importing a new dashboard item this value will be updated immediately.	Number
Percent Complete	If Planned Work is non-blank and non-zero then this value is computed as 100 * (Actual Work) / (Planned Work). This value is exported, but ignored on import as the system automatically computes this value.	Number
Notes	Notes about this dashboard item.	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: | 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
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)

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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: | 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
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 | 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 task. | Text (2000 chars max) |

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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	Task Group status. Possible value are: | 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
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 task group.	Text (2000 chars max)

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Timesheet Fields

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

> **Note:** When **importing**, the header field name must match the value below exactly in order to be recognized.

> **Note:** When **exporting**, you can combine fields using custom export field expressions. See the Expression Fields topic for more information.

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. Note that if the record is for a punch-out you should specify the special character '*' (without the quotes). This will close any current punch-in (or do nothing if not punched in). A punch-out record will not update any other entry properites, such as Project, etc. - any values in the punch-out record will be ignored.	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. Note that if the record is for a punch-in you should specify the special character '*' (without the quotes). This will close any previous punch-in, and start a new punch-in.	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)

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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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