**Work and Asset Management, V2.1.1**

**5.8.1.5 Report Time and Manage Timesheets**

Creation Date: December 05, 2015

Last Updated:

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1. To update the table of contents, put the cursor anywhere in the table and press [F9]. To change the number of levels displayed, select the menu option Insert‑>Index and Tables, make sure the Table of Contents tab is active, and change the Number of Levels to a new value.

## Brief Description

**Business Process: 5.8.1.5 WAM.v2.1.Report Time and Manage Timesheets**

**Process Type: Sub-Process**

**Parent Process: 5.8.1 WAM.v2.1.Manage Work and Work Orders**

**Sibling Processes: 5.8.1.3 WAM.v2.1.Manage Approvals, 5.8.1.2 WAM.v.2.1.Manage Work Orders**

This process gets initiated when WAM Authorized User creates Timesheet for the Employee who reports his time for time sheet entry. Time sheet is created and sent for approval. When approved, Time sheet details are created, financial transactions are performed, etc. Upon completion all required steps Time sheet is posted and completed.

## Business Process Model Page 1



## Business Process Model **Page 2**



## Detail Business Process Model Description

[**1.0**](#_Business_Process_Model_2) **Review Timesheets**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User reviews time sheet before creating a time sheet.

Note: An employee (regular user) only can only search/view/edit his/her own timesheets. While a supervisor can perform same action not only his/her timesheets but also all the for all people report to the supervisor.

|  |
| --- |
| Employee |

**Configuration required (Y/N) Entities to Configure:**

[**1.1**](#_Business_Process_Model_2) **Select Pay Period and Populate Required Data**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User selects pay period, populates required data to create [new Time Sheet.](#_W1-Timesheet)

|  |
| --- |
| Time period; |

**Configuration required (Y/N) Entities to Configure:**

[**1.2**](#_Business_Process_Model_2) **Add Timesheet in Created Status**

A**ctor/Role:**  WAM

**Description:** WAM application creates Time Sheet in Created state and adds the data provided by WAM Authorized User. It also validates to ensure that there is only one non-cancelled Time Sheet for employee.

|  |
| --- |
| W1-TIMSTINFO (Timesheet Information) |
| W1-VALTIMSHT (Validate Timesheet) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**1.3**](#_Business_Process_Model_2) **Add Timesheet Line Item(s) and Populate Required Data**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User adds line items for the Time Sheet and populates other required data

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |

**Business Object (Y/N) Business Object**

|  |
| --- |
| Line Items |

**Configuration required (Y/N) Entities to Configure:**

[**1.4**](#_Business_Process_Model_2) **Validate Data, Add Timesheet Line Item(s) in Created Status, Display Summary**

A**ctor/Role:**  WAM

**Description:** WAM application validates data entered for line items, adds line items and displays time sheet summary. It further cancels if there exists any non-final or in-progress Time Sheet approval requests. It also determines unit prices, cost center charge, expense codes, etc and processes accordingly.

Note: Unit price (billing rates) are defined at Employee and Craft. Which unit price to use is defined at employee’s Business Unit.

|  |
| --- |
| W1-CANTSAPR (Cancel Timesheet Approval Request) |
| W1-VALTDCHG ( Validate Timesheet Detail updates) |
| W1-TSDETINFO ( Timesheet Detail Information |
| W1-POPTDPRE ( Populate Timesheet Details Pre-Processing |
| W1-POPTDCREW ( Populate Timesheet Detail Crew |
| W1-VALTSDETL ( Validate Timesheet Detail) |
| W1-VALPRJINF ( Validate Project Information) |
| W1-VALTSDACT ( Validate Timesheet Detail Activity and Project) |
| W1-POPTMSDET ( Populate Timesheet Details |
| W1-UPTSDTOTL ( Get Unit Price and Calculate Timesheet Detail Total |
| W1-VALTDCCEC ( Validate Timesheet Detail Cost Center and Expense Code |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |

**Business Object (Y/N) Business Object**

[**1.5**](#_Business_Process_Model_2) **Submit for Approval**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized Users submits Time Sheet for approval.

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

|  |
| --- |
| Approval Profile |
| Employee, Employee Business Unit |
| Craft |

**Configuration required (Y/N) Entities to Configure:**

[**1.6**](#_Business_Process_Model_2) **Update Timesheet to “Pending” Approval**

A**ctor/Role:**  WAM

**Description:** WAM ensures that the Employee is active and also has a valid Approval profile configured to approve Time Sheets. It then creates the approval request send Time Sheet for approval. Otherwise it will create an error.

|  |
| --- |
| W1-VALTDFAPR (Validate Timesheet Detail for Approval) |
| W1-CRTSAPRQ (Create Timesheet Approval Request) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**1.7**](#_Business_Process_Model_2) **Manage Approval 5.8.1.3 WAM.v2.1Manage Approvals**

A**ctor/Role:**  WAM

**Description:** WAM manages Time Sheets submitted for approvals. Refer to process 5.8.1.3 WAM.v2.1 Manage Approvals for more information.

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**1.8**](#_Business_Process_Model_2) **Update Timesheet Status to “Rejected”**

A**ctor/Role:**  WAM

**Description:** WAM updates Time Sheet status to Rejected state.

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**1.9**](#_Business_Process_Model_2) **Review Rejected Timesheet and Details**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User reviews rejected Time Sheet and its details. After review, User can either resubmit Time Sheet for reopen or cancel timesheet. Timesheet cannot stay in rejected status

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**2.0**](#_Business_Process_Model_2) **Request Cancel Timesheet**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User requests to cancel Time Sheet.

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**2.1**](#_Business_Process_Model_2) **Update Timesheet Status to “Canceled”**

A**ctor/Role:**  WAM

**Description:** WAM updates Time Sheet status to ‘Canceled’ state. Prior to this WAM cancels non-final or in-progress time sheets approval requests and also cancels all Time Sheet details records.

|  |
| --- |
| W1-CANTSAPR (Cancel Timesheet Approval Request) |
| W1-CANTMSDET (Cancel Timesheet Details) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |
| W1-FinancialTransaction |

**Business Object (Y/N) Business Object**

[**2.2**](#_Business_Process_Model_2) **Update Timesheet Details Status to “Canceled”**

A**ctor/Role:**  WAM

**Description:** WAM updates Time Sheet details to ‘Canceled’ state. Prior to this it reverses the financial transactions related to time sheet.

|  |
| --- |
| W1-REVTMSFTR ( Reverse Timesheet Detail Financial Transaction) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |
| W1-FinancialTransaction |

**Business Object (Y/N) Business Object**

[**2.3**](#_Business_Process_Model_2) **Request Reopen Timesheet**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User requests to reopen the Time Sheet.

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**2.4**](#_Business_Process_Model_2) **Update Timesheet to Created Status**

A**ctor/Role:**  WAM

**Description:** WAM updates Time Sheet to ‘Created’ status.

|  |
| --- |
| W1-TIMSTINFO (Timesheet Information) |
| W1-VALTIMSHT (Validate Timesheet) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**2.5**](#_Business_Process_Model_2) **Update Line Item(s)**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User updates line items.

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |

**Business Object (Y/N) Business Object**

[**2.6**](#_Business_Process_Model_2) **Update Timesheet Details**

A**ctor/Role:**  WAM

**Description:** WAM updates the data updated for line times related to Time Sheet.

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |

**Business Object (Y/N) Business Object**

[**2.7**](#_Business_Process_Model_2) **Search for Timesheet**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User searches for required Time Sheet in the system.

[**2.8**](#_Business_Process_Model_2) **Update Timesheet to “Approved”**

A**ctor/Role:**  WAM

**Description:** WAM updates Time Sheet to ‘Approved’ state.

|  |
| --- |
| W1-TRDEFNEST (Move Timesheet Details and Timesheet to Next Default Status) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**2.9**](#_Business_Process_Model_2) **Review Approved Timesheet and Details**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User reviews Approved Time Sheet and its details.

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |

**Business Object (Y/N) Business Object**

[**3.0**](#_Business_Process_Model_2) **Request Withdraw Approval**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User makes a request to withdraw Approval.

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**3.1**](#_Business_Process_Model_2) **Update Timesheet to Created Status**

A**ctor/Role:**  WAM

**Description:** WAM updates Time Sheet to ‘Created’ status.

|  |
| --- |
| W1-TIMSTINFO (Timesheet Information) |
| W1-VALTIMSHT (Validate Timesheet) |
| W1-CANTSAPR (Cancel Timesheet Approval Request) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**3.2**](#_Business_Process_Model_2) **Update Line Item(s)**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User updates line items.

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |

**Business Object (Y/N) Business Object**

[**3.3**](#_Business_Process_Model_2) **Update Timesheet Details**

A**ctor/Role:**  WAM

**Description:** WAM updates the data updated for line times related to Time Sheet.

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |

**Business Object (Y/N) Business Object**

[**3.4**](#_Business_Process_Model_1) **Identify and Validate Approved Timesheets Details for Periods Less than Current Date**

A**ctor/Role:**  WAM

**Description:** WAM identifies approved Timesheets and validates them. It ensures that the Time Sheet details date is prior to the current date.

|  |
| --- |
| W1-TRDEFNEST ( Move Timesheet Details and Timesheet to Next Default Status) |
| W1-CHKTSDTDT (Check Timesheet Detail Date**)** |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |

**Business Object (Y/N) Business Object**

|  |
| --- |
| Timesheet MO Periodic Monitor Process |

**Customizable process (Y/N) Process Name**

[**3.5**](#_Business_Process_Model_1) **Create Financial Transaction(s)**

A**ctor/Role:**  WAM

**Description:** WAM initiates Financial Transactions creation for the Time Sheet information.

|  |
| --- |
| W1-TRDEFNEST ( Move Timesheet Details and Timesheet to Next Default Status) |
| W1-CRETMSFTR ( Create Timesheet Detail Financial Transaction) |
| W1-CHKTSDTDT (Check Timesheet Detail Date) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |
| W1-FinancialTransaction |

**Business Object (Y/N) Business Object**

[**3.6**](#_Business_Process_Model_1) **Update Timesheet Details(s) Status to “Posted”**

A**ctor/Role:**  WAM

**Description:** WAM updates the Time Sheet Details to ‘Posted’ state when Financial Transactions are successfully created and posted.

|  |
| --- |
| W1-CHKTSDTDT ( Check Timesheet Detail Date) |
| W1-CRETMSFTR ( Create Timesheet Detail Financial Transaction) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-TimesheetDetail |
| W1-FinancialTransaction |

**Business Object (Y/N) Business Object**

[**3.7**](#_Business_Process_Model_1) **Update Timesheet Status to “Posted”**

A**ctor/Role:**  WAM

**Description:** WAM updates Time Sheet status to ‘Posted’ state.

|  |
| --- |
| W1-TRDEFNEST ( Move Timesheet Details and Timesheet to Next Default Status) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

[**3.8**](#_Business_Process_Model_1) **Review Posted Timesheet and Details**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User reviews Posted Time Sheet and its details.

|  |
| --- |
| W1-Timesheet |
| W1-TimesheetDetail |

**Business Object (Y/N) Business Object**

[**3.9**](#_Business_Process_Model_1) **Request Reopen Timesheet**

A**ctor/Role:**  WAM Authorized User

**Description:** WAM Authorized User makes a request to reopen Timesheet.

[**4.0**](#_Business_Process_Model_1) **Update Timesheet to Created Status**

A**ctor/Role:**  WAM

**Description:** WAM updates Time Sheet to ‘Created’ status.

|  |
| --- |
| W1-TIMSTINFO (Timesheet Information) |
| W1-VALTIMSHT (Validate Timesheet) |
| W1-CANTSAPR ( Cancel Timesheet Approval Request) |

**Process Plug-in enabled (Y/N)**  **Available Algorithm(s):**

|  |
| --- |
| W1-Timesheet |

**Business Object (Y/N) Business Object**

## Test Documentation related to the Current Process

| ID | Document Name | Test Type |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Document Control

**Change Record**

| Date | Author | Version | Change Reference |
| --- | --- | --- | --- |
|  |  |  |  |
| 10/09/2015 | Barry DeMartini,  Galina Polonsky | 1 | Initial Version |
| 06/07/2016 | Huan Vu | 1.0 | Reviewed |
| 07/07/2016 | Srinivas Kanteti | 1.1 | Applied Template, Formatting, minor changes after review |
| 09/10/2016 | Galina Polonsky | 1.1 | Reviewed, Approved |
|  |  |  |  |

## Attachments

### 

### W1-Timesheet



### W1-TimesheetDetail



### Timesheet Entry Screen

