Weekly Time Sheet and Time Center

Setup Checklist

Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	22-OCT-2021	Initial publication

Contents

Introduction

This document guides you through setup of the Weekly time sheet and Time center modules of InEight Progress.

Organization setup

To set up an organization for the applications:

1. In the InEight cloud platform, open the main menu, and then click **All projects & organizations**.
2. Open the **Organizations** tab.
3. Select the root organization, and then click the **Edit** icon.
4. Turn on **Using unique budget code**.
5. Select options for budget code segments and add or remove segments as necessary.

NOTE:	The standard configuration is Project.Phase code. Confirm that the budget code matches your organization's design decision.

NOTE:	You can change the budget code but to do so requires an additional structure push. This is not recommended after time is entered on a project.

Organization settings

To set up the fiscal period at the organization level, go to Settings > General > **Fiscal Calendar**, and then set **Week ending day** to be Saturday or Sunday.

NOTE:	Setting this field to a weekday might impact performance.

At the organization level, go to Settings > **Progress**, confirm that the following Progress tables have IDs:

- Time configuration > Employee reason codes
- Time configuration > Equipment reason codes
- Time configuration > Employee premiums
- Others > Extra pay

NOTE:	Confirm that Time center and Weekly time sheet organization settings match your design decisions.

Project settings

At the project level, go to Settings > Progress > **Time configuration**, and then turn on **Use employee reason codes**.

Time configuration

Select the time calculations that may be used to record daily time

Use employee reason codes
⚠ Modification only allowed when no plans exist

[On]

NOTE:	This toggle can only be modified when no daily plans exist in the project.

Project details

On the project home page, click **Project details** in the side menu, and then set the following fields in the Details tab:

- Set **Status** to Active.
- Select a **Project start date**.
- Select a **Project end date**.

Employees and users

Confirm that users can access Weekly time sheet and Time center. To set up a specific user profile to access the applications:

1. From the main menu, go to Suite administration > **User management**.
2. Select the user trying to access the applications, and then click the **Edit** icon.
3. In the User details section, enter the **Employee ID**.
4. Enter a **Start date** and **End date**.
5. In the Roles section, click the info icon for the role, and then confirm that the assigned role has the View employees permission under Master data libraries > Operational resources > **Employees**.

Confirm that employees can access Weekly time sheet and Time center and have union assignments.

To set up an employee record:

1. From the main menu, go to Master data libraries > **Operational resources**.
2. On the Employees tab, open the employee's trade, and then craft.
3. Select the employee, and then click the **Edit** icon.
4. In the Employee details section, enter a **Start date** and **End date**.
5. Confirm a **Union** assignment, if applicable.
6. In the Time reporting section, turn on **Employee available for selection in weekly timesheet**.

> **NOTE:** Override craft requires union assignment.

Confirm that users are added to the project:

1. From the project home page, click **Manage users** in the Assigned users tile.
2. Search for the user's name.

If the user is not present, add it to the project:

1. From the Assigned users page, click the **Add** icon, and then select **Add members to this project**.
2. Select a role from the Project role drop-down list.
3. In the Members available in library table, find the user, and then click the add icon next to it.
   - The user is added to the Selected members table.
4. Click **Add**.

Confirm that employees are added to the project:

1. From the project home page, click **Manage employees** in the Assigned employees tile.
2. Search for the employee's name.

If the employee is not present, add it to the project:

1. From the Assigned operational resources page, click the **Add employee to project** icon at the top of the page.
2. In the Employees available in library table, find the employee, and then click the add icon next to it.
   - The employee is added to the Selected employees table.
3. Click **Add**.

Confirm that employee project dates are aligned with employee record dates:

1. From the project home page, click **Manage employees** in the Assigned employees tile.
2. On the Assigned operational resources page, find the Employee project start date and Employee project end date columns.

Sync budget structure

To sync the budget structure from InEight Control:

1. Open the Control Workspaces module.
2. On the CBS tab, open the Actions drop-down menu, and then select Sync > **Push CBS structure**.

Allowances for Weekly time sheet

APIs are required to link allowances to specific employees.

NOTE:	Allowances are also referred to as extra pay.