



e-Builder Time Tracking

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About Time Tracking

Time Tracking facilitates resource management by allowing team members to submit time sheets for billable and non-billable activities. Time sheets are then routed to the correct approver(s) based on the configured workflow for the role submitting the time sheet. Account administrators can optionally enable Cost Integration, which will give you the ability to tie labor costs to different project commitments in order to better manage total project costs. Labor costs are factored into the equation using bill rates. Cost integration allows you to take resource management one step further by creating invoices against commitments associated with billable activities. Account configuration steps, user and administrative tasks can be referenced below. Use these links to help you understand and work with time tracking.

User Tasks

- Submit Time Sheets
- View Active Workflows

Administrative Tasks

- Review/Approve Time Sheets
- Approve Time Sheet Invoices (Cost Int.)
- Run Time Tracking Reports

Related Topics:

- [About Managing Time Tracking](#)

Access Manage (Projects) Bill Rates Page

To access Project Bill Rates page

1. Click the **Projects** Tab from the Top Navigation menu.
2. Choose a project from the **All Projects** menu.
3. From the Project Menu, click **Manage Bill Rates**.
The Manage (Project) Bill Rates page is displayed.

Related Topics:

- [About Time Tracking](#)
- [Manage Project Bill Rates](#)
- [Review/Approve Time Sheets](#)

Access Submitted Time Sheets

To access a submitted time sheet

1. Click the Time Sheet Tab from the Top Navigation menu.
The Time Sheets page is displayed.

2. From the **Your Time Sheet** or the **Employee Time Sheets** tab, filter for the desired time sheet and then select it from the table below.

The Time Sheet for [User] page is displayed.

Submit Time Sheets

Time sheets can be submitted by anyone with Create Time Sheets permissions.

To submit a time sheet

1. Click the **Time Sheet** Tab from the Top Navigation menu.
The Time Sheets page displays.
2. If you're able to approve time sheets, two tabs appear (Your Time Sheet and Employee Time Sheets). If not, click **Add Time**.
3. If you are in multiple roles, the **Role** drop-down menu appears. Choose the role for which you are submitting the time sheet.
4. Click the pencil icon in the **Project** column to choose the project.
5. Click the **Activity** drop-down menu to make a selection.

Note: Billable activities are only enabled for projects that have been marked as billable and have a bill rate associated with them. If you're unable to access billable activity, ask your account administrator to check your bill rate settings.

6. If you chose a billable task with associated commitments, you're able choose a commitment from the **Commitment Details** column to track your time against.
7. Enter time spent for each applicable day of the week.
8. *Optional:* Take any of the following actions:
 - Enter a note by clicking the **Note** icon next to each cell.
 - Attach Documents, Forms or Processes.
9. Save the time sheet for later

—Or—

Click **Submit** to route it for review and approval.

View Active Workflows

After a time sheet is submitted, it is routed to one or more parties for approval based on the workflow configured for that submission. You can view the active workflow to see in which step of the process the time sheet is in.

To view the active workflow

1. Click the Time Sheet Tab from the Top Navigation menu.
The Time Sheets page displays.
2. If available, click the **Your Time Sheets** tab and filter for the submitted time sheet(s).
3. Click the link of the time sheet.

4. Click the **Show History** link.
The Routing History page displays.
5. Click **Show Workflow**.
A secondary Graphical View window appears. The current step of the workflow is highlighted with a blue border.

Related Topics:

- About Time Tracking
- Submit Time Sheets

Manage Project Bill Rates

This task can be completed by users with Manage Project Bill Rates permissions.

Default bill rates are established at the account level on the Manage Membership page, however the Manage Bill Rates page in Project Details gives you a convenient, secondary way of modifying user bill rates for particular projects. Changes made here also update account settings and vice versa.

To set Project Bill Rates

1. Go to the Manage Bill Rates page.
For instructions see Access Manage (Project) Bill Rates Page.
2. For the desired user(s) select the Billable check box.
3. *Optional:* To use the default rate select the **Default Bill Rate** check box.
The default rate displays in the **Bill Rate Per Hour** column.
4. If you are not using the default rate, enter an hourly rate in the **Bill Rate Per Hour** column.
5. Click **Save**.

Related Topics:

- Manage (Project) Bill Rates Page Overview
- Manage Account Bill Rates
- About Time Tracking

Manage Project Bill Rates

This task can be completed by users with Manage Project Bill Rates permissions.

Default bill rates are established at the account level on the Manage Membership page, however the Manage Bill Rates page in Project Details gives you a convenient, secondary way of modifying user bill rates for particular projects. Changes made here also update account settings and vice versa.

To set Project Bill Rates

1. Go to the Manage Bill Rates page.
For instructions see Access Manage (Project) Bill Rates Page.
2. For the desired user(s) select the Billable check box.

3. *Optional:* To use the default rate select the **Default Bill Rate** check box.
The default rate displays in the **Bill Rate Per Hour** column.
4. If you are not using the default rate, enter an hourly rate in the **Bill Rate Per Hour** column.
5. Click **Save**.

Related Topics:

- Manage (Project) Bill Rates Page Overview
- Manage Account Bill Rates
- About Time Tracking

Review/Approve Time Sheets

The route that time sheets take for review and approval are based on the workflow assigned to the role/user that is submitting the time sheet. You must be an actor on the review step of the workflow to take action on the time sheet, i.e. review/approve/reject the time sheet.

To review time sheets

1. Click the **Time Tracking** tab from the Top Navigation menu.
2. From the **Employee Time Sheets** tab, filter for the time sheets you wish to review. By default, all time sheets in your court will appear in the table toward the bottom of this page.
3. Click the **Time Sheet Dates** link for the one you wish to review.
The Time Sheet for (User) page displays.
4. *Optional:* You can:
 - View the history of the workflow
 - View current actors
 - Override workflow
 - Add Comments, documents, forms or processes.
 For field descriptions on this page, see Time Sheets Page Overview.
5. Review the time sheet and then take an action by choosing an option from the **Please select an action** drop-down menu located in the upper right corner of the page.

Note: Depending on Workflow Details, choosing an action (step 6) may automatically route the process to the next step.
6. If necessary, click **Take Action**.
The Time Sheet is routed to the next step in the process.

Related Topics:

- About Workflows
- About Time Tracking

Override Time Sheet Workflows

This task can be completed by Account Administrators. Overriding a workflow allows you to bypass the current step of the process, add additional step actors to the current step, and/or change the current time sheet's status.

To override workflows

1. Go to the submitted time sheet.
For instructions, see Access Submitted Time Sheets.
2. Click the **Workflow Override** link located in the upper right corner of the page.
The Time Sheet for [User] - Override page displays.
3. Complete all necessary fields.
For a description of each field, see Workflow Override (Time Sheet) Page Overview.
4. Click **Override**.

Approve Time Sheet Invoices

If time tracking is integrated with Cost and the workflow is configured to generate invoices, a draft invoice will automatically be created when a time sheet with billable tasks is approved. Activities that include commitment items produce a draft commitment invoice and those that do not have commitments produce a general invoice in draft status. These draft invoices can be found in the Cost module in Unfinished Drafts or by filtering for them on the Actual Costs page.

To review/approve time sheet invoices

1. Click the Cost tab from the Top Navigation menu.
2. Click the Unfinished Drafts link in the upper right corner of the page.
—Or—
Go to the Project Actual Costs page. For instructions, see Access Actual Costs Page.
3. Filter for and select the appropriate draft commitment or general Invoice.
The Invoice Details page display.
4. Click **Approve**.
5. Click the current date link to insert today's date into the field, or enter a different date in the **Approval Date** field.
6. Click **Yes, Approve Commitment**.
The newly added commitment is updated on the Project Cost Summary and Commitments Quick Cost Summary.

Related Topics:

- About Time Tracking
- Integrate Time Tracking with Cost
- Create Workflows (Time Tracking)

Run Time Tracking Reports

Time tracking reports allow you to see time sheet details such as the initiator and hours submitted per week.

To run time tracking reports

1. Click the Reports tab on the Top Navigation menu.
2. Click **Add Report**.
3. From the drop-down menu, select Time Tracking, and then click **Next**.
4. Choose the type of report you wish to run, and then click **Next**.
 - **Tabular**: Provides simple listing of data with no subtotals
 - **Summary**: Provides the option to sort and subtotal data
 - **Matrix**: Summarizes data in a table and allows you to group both rows and columns
5. Select the columns of data you wish to include in your report.
Note that there are some default selections.
6. Choose how you wish to summarize the information you selected in the previous step, and then click **Next**.
7. Choose the order of your columns and the order by which to sort them, and then click **Next**.
8. If you chose Summary or Matrix reports you are able to choose the information by which to group the rows (Summary) or columns (Matrix) in your report.
9. If you wish, specify filters to include or exclude specific types of information.
10. Click **Run Report**.

Manage (Project) Bill Rates Page Overview

This page allows those with Manage Project Bill Rates permission to establish a user's bill rate for the project. Default rates are established at the account level by account administrators. Bill rates are required for billable Time Tracking activities. They allow you to set hourly rates for project participants in order to more accurately track project costs. When a time sheet is entered and a commitment is selected, the pay out calculations will be determined based on the bill rate. Bill rates can be set here as well as on the Manage Membership page.

For instructions, see Set Project Bill Rates.

Fields and Buttons

The fields and buttons on this page are:

- **User**: This columns lists project participants.
- **Billable**: Select this check box to make the user billable for the selected project. This will allow you to track their time against billable activities and associated commitments and ultimately generate a invoice for their time. You will have to set a bill rate by choosing the Default Bill Rate check box or entering a specific one in the Bill Rate Per Hour text box.
- **Default Bill Rate**: Select to utilize this user's default bill rate on the project. If a default has not been set for them at the account level, you're able to define it here and it will update the account setting as well. To learn more, see Manage Account Bill Rates.

- **Bill Rate Per Hour:** This field will display the user's default bill rate if the Default Bill Rate check box is selected and one is established at the account level. Also, if the user is marked as billable and a default rate is not in use, this text box will be editable for you to enter a rate for this particular project.

Time Sheets Page

The e-Builder Time Tracking module allows your employees and/ or consultants to track their time against e-Builder projects and/ or activity codes. They can then submit their time sheets to be routed to the correct approver(s) (i.e. management) based on the associating Time Tracking workflow configured for the initiator s username or role. For more about Time Tracking Workflows, see Workflow within Admin Tools in Setup.

The following procedural instructions will also guide you through working with time sheets:

User Tasks

- Submit Time Sheets
- View Active Workflows

Administrative Tasks

- Review/Approve Time Sheets
- Approve Time Sheet Invoices (Cost Int.)
- Run Time Tracking Reports

Fields and Buttons

The fields and buttons located on this page are:

- **Add As Contact:** This button appears only if the user is not yet an e-Builder contact. Click to add the user as a contact. If the company name is not recognized you will be prompted to save it.
- **Manage Membership:** Click to open the Manage Membership page where you will be able to set the user's project membership; validate their account and project roles; and determine the project level template to add them to.
- **Edit:** Click to edit the details of the user's account record.
- **Cancel:** Click to return to the Manage Users page.

Member Profile

- **First Name:** Displays the user's first name.
- **Last Name:** Displays the user's last name.
- **Username:** Displays the user's username used to log in to e-Builder.
- **Last Login:** Displays the date the user last logged in to e-Builder Enterprise.
- **License Type:** Displays the user's license type. Options are as follows:
- **Contracted License:** Contracted licenses are the licenses included in your e-Builder subscription. If your subscription includes 50 user licenses, you have 50 contracted licenses that may be assigned to users to give access to your account.
- **Individual License:** An individual license is assigned to a user that is required to purchase their license prior to gaining access to your e-Builder account. They will be taken through a purchase pro-

cess the first time they log in during which they will be able to purchase their license using a credit card. For more information, see Individual License Manager.

- **Company:** Displays the user's company affiliation.
- **Email Address:** Displays the user's email address.
- **Access Expires:** If applicable, displays the date the account is set to expire.
- **Hide in Global Directory:** A check mark in this field indicates that this user is hidden in the global directory, which ensures they cannot be added to multiple accounts. When adding existing users from another account, this person will not be listed in the list of available users.
- **Access to documents only:** A check mark in this field indicates that this user only has access to documents and not any other e-Builder module.

Business Information

- **Type of Business:** Displays the type of business the user is affiliated with. Options may include any of the following:
 - Owner/ Owner's Rep
 - Construction Manager
 - Architect/ Engineer
 - General Contractor/ Design Builder
 - Specialty Contractor
 - Consultant
 - Supplier
 - Other
- **Department:** Displays the name of the department the user belongs to.
- **P.O. Box/Suite:** Displays the user's P.O. Box or Suite address.
- **State/Province:** Displays the user's state or province
- **Postal/ Zip Code:** Displays the zip code.

Your Time Sheet Page

This page allows those with Create Time Sheet permission to submit and view time sheets. For instructions, see Submit Time Sheets.

Fields and Buttons

The fields and buttons located on this page are:

View Mode

The fields in this section are only visible when viewing a time sheet that has already been submitted.

- **Workflow Override:** Available to account admins on submitted time sheets. Click to bypass the current step and/or add additional step actors to the current step, and/or override the current time sheet's status to another status. You can also chose to not send notifications related to these updates, and add notes when desired. For instructions, see Override Workflows.

- **Show History:** Click to see all past steps of the selected time sheet. The Routing History page appears and from there you are also able to view the active workflow and every actor that took action on each of the steps.
- **Current Actors:** Click to view all possible actors of the current step.
- **Accept/Decline:** These buttons appear if you are a step actor (i.e. time sheet approver) and there are multiple people in this role which can take action on the time sheet. Click Accept to take responsibility and take an action, this will relinquish others in this role from this responsibility. Click Decline to remove yourself as a responsible party. If all others in the role decline before you do, the last person left in the role will not have the Accept/ Decline option and this task will remain in their court until action is taken.
- **Please Take Action drop-down menu:** Click the drop-down arrow to select an action to take.

Note: Depending on workflow configurations, simply choosing an action from this drop-down menu will submit the action and move the workflow to the next step. See Add/Edit Workflow Properties for more information.
- **Take Action:** Click to take the selected action and move the workflow to the next step.

Note: This button may or may not be visible depending on workflow configurations. If not visible, simply choosing the action will submit the workflow. See Add/Edit Workflow Properties for more information.
- **Delegate:** This button is visible to Account Administrators. Click to delegate steps in the workflow to another user. A notification will be sent to the recipient letting them know time sheet was delegated to them. This user can then choose to accept or decline full authority. If they accept it then it will move this time sheet into their court. If they decline then a notification will be sent back to the original actor who delegated the time sheet and it will remain in their court.
- **Cancel:** Click to discard changes and return to the Time Sheets page.

Edit Mode

These fields are available while inputting the time sheet and may also appear in View Mode.

- **Return to Time Sheets:** Click to return to the Time Sheets page and filter for specific time sheets.
- **Role:** This drop-down menu displays only if you are in multiple roles with the permissions to submit time sheets. Choose the role for which you are submitting this particular sheet. The selected role determines the projects, activities and workflow that is enabled for the time sheet.
- **Add Row:** Click to add an addition row to add time to.
- **Calendar picker:** Click the calendar picker icon to jump to another time sheet work week.
- **Left navigation arrow:** When viewing your own time sheets the left navigation arrow moves you to the previous work week. When viewing employee time sheets the left navigation arrow moves you to the previous employee time sheet in the filtered list on the Employee Time Sheets tab.
- **Right navigation arrow:** When viewing your own time sheets the right navigation arrow moves you to the next work week. When viewing employee time sheets the right navigation arrow moves you to the next employee time sheet in the filtered list on the Employee Time Sheets tab.

- **Project:** Click to choose a project to track time to. In view mode, this field displays the selected project.
- **Activity:** Click to choose an activity. If billable activities are disabled, ensure that the administrator has bill rates assigned to you. See Manage Project Bill Rates for more information.
- **Commitment Details:** This column appears if a billable activity is selected which has commitments associated with it. Choose the appropriate commitment to track time against. In View mode, the selected commitment is displayed.
- **Days of the Week/ Dates:** Enter the amount of time spent on the respective activity. In View mode the cells list of amount of time entered for each activity.
- **Total:** Displays the total amount of time spent on the respective activity for the selected week.
- **Payout:** This column is only visible to users with View Payout permissions and when a billable activity is selected. It contains the sum of the hours entered multiplied by the user's bill rate.
- **Add to Favorites:** Click the pin icon to add that project and/ or activity combination as a favorite. This will result in that project and/ or activity to be defaulted in future time sheets. To remove this row as a favorite you can deselect the pin icon in the current, or any future time sheet, to have it no longer defaulted into your future time sheets.

Note: Only new, draft and rejected (to the current actor) time sheets will display the pin icon.

Workflow Override (Time Sheet) Page

Account Administrators will use this page to override a workflow step, add actors or change the status of a process.

For instructions, see Override Time Sheet Workflows.

Fields and Buttons

The fields and buttons on this page are:

- **Return to Time Sheets:** Click to return to the Time Sheets page and filter for specific time sheets.
- **Lookup:** Click to view the workflow. The current step is indicated by a blue boarder.
- **Step:** Lists the name of the current step. If applicable, you are able to move the process to another step.
- **Step Actors:** Lists all possible step actors.
- **Add Actors:** Allows you to add additional actors to this step.
- **Do Not Send Notifications:** Select to make changes without sending a notification to any of the actors.
- **Status:** Click to choose the status of the process.
- **Comment:** Use this field to enter a comment, which will appear on the Comments tab of the time sheet.
- **Override:** Click to submit changes and complete the override.
- **Back:** Click to discard changes and return to the Time Sheet page.