

User Manual

Timesheet

Powered By - Service Now

Created By - XACT Product Team

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XACT Time Sheet Management ~ User Manual

Purpose:

To provide a high-level overview of the time sheet management module for users.

Scope:

This document contains the steps to create the timesheet and update details on service now.

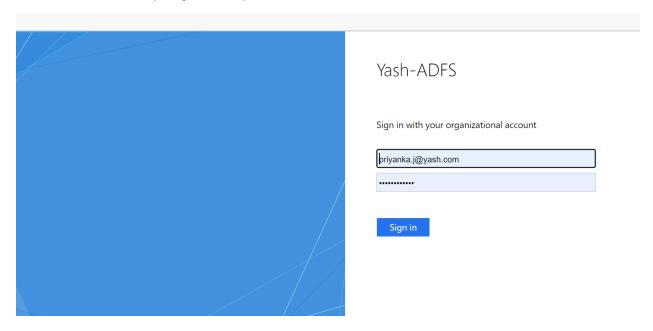
Roles:

IRM, SRM, Project Manager, Delivery manager, Project Team member

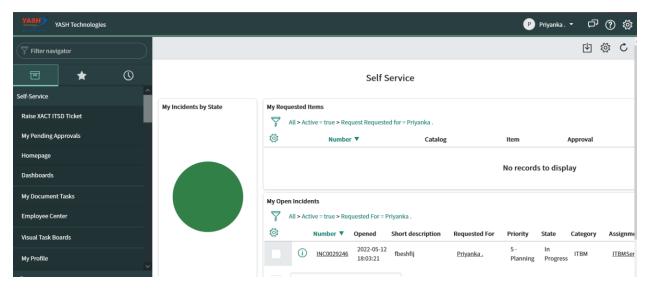


Walkthrough on Service Now:

Test Instance: https://yashinmsptest.service-now.com/



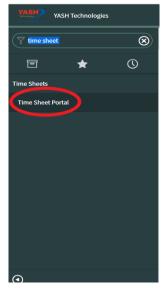
• When the user logs in to the ServiceNow Portal, redirected to the Home Page.



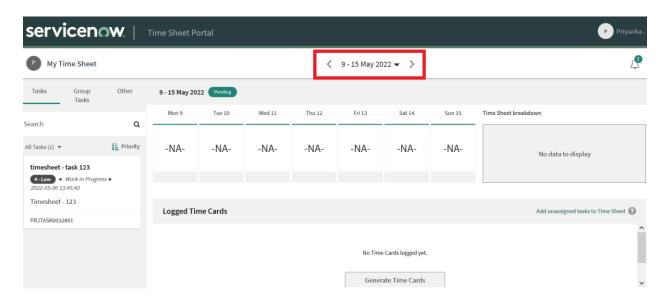


Add New Timesheet (Roles: All the Yash Users)

1. Using the *Navigator* tool search for Timesheet and click on Time Sheet Portal.

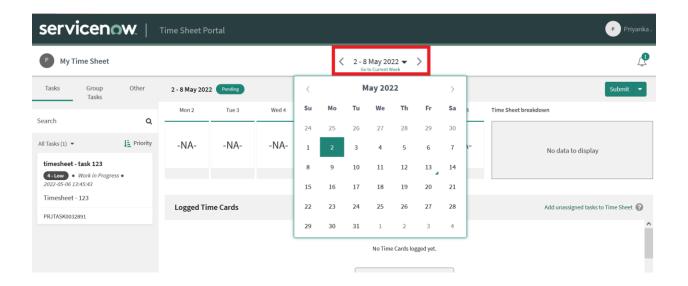


2. By default, the timesheet form will load from the current week.

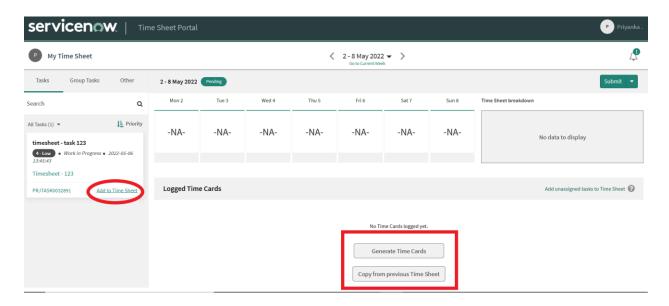




3. To view previous week or change the week click on dropdown button to view the calendar and select the respective week or click on the forward and backward arrows.

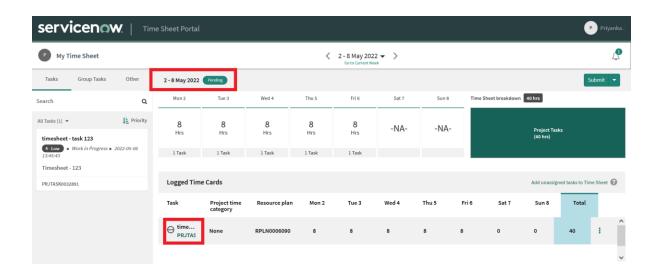


4. Click on Add to timesheet under the Project Task or Generate Time Cards or can also copy from Previous Time Sheet.

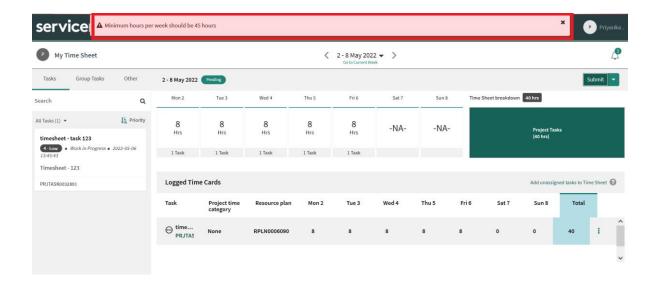




5. Time Sheet related to specific Project will appear. Add the number of hours worked for the project. Status shows as **Pending** till the user submits the timesheet.

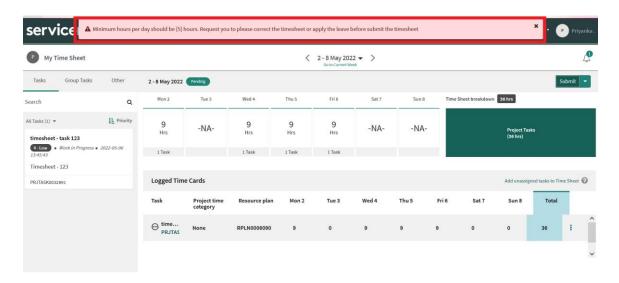


6. User cannot submit the timesheet less than 45hrs per week, unless and until Time off is applied.

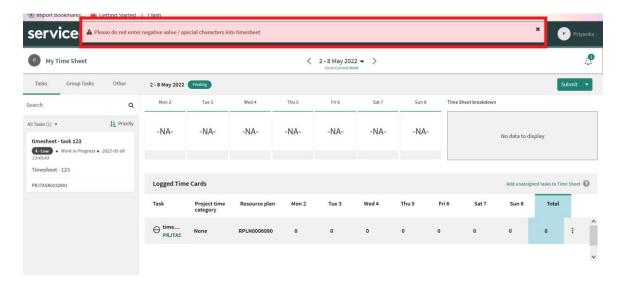




7. User cannot submit **(0)** hours on a particular day, the minimum hours per day should be **(5)** hours.

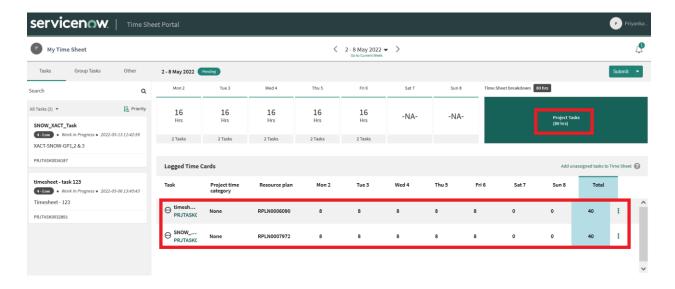


8. User cannot submit the negative hour values. When the user enters the negative value, system will automatically throw an error as below:

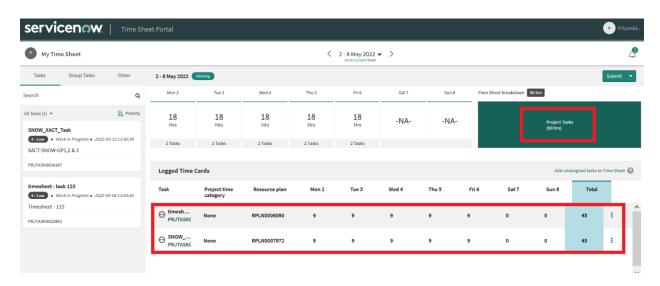




9. User can submit multiple time cards if allocated to **multiple projects/project tasks**. User can submit the timesheet with weekly maximum limit of **80hrs(16hrs/day)**, when the resource time is **8hrs/day**.



10. User can submit the timesheet with weekly maximum limit of **90hrs (18hrs/day)**, when the resource time is **9hrs/day**.

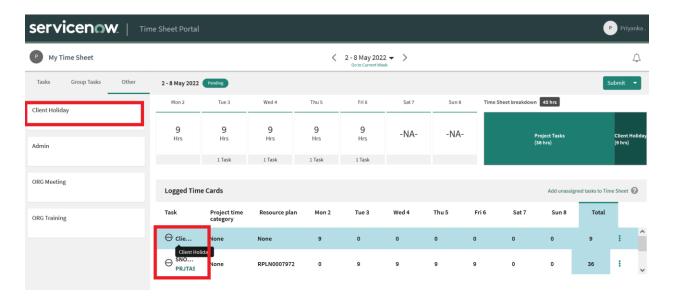


Note: Group Tasks are group of Project Tasks.

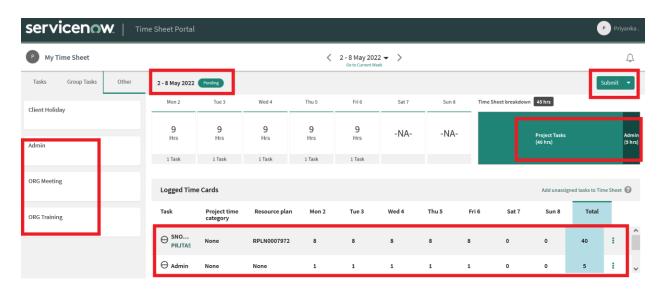


Add Non-Billable Task

- 1. Click on Others tab where you will have multiple options (Client holiday, Admin, ORG Meeting, ORG Training) to choose and add them to Timecard along with hours.
- 2. If the user is working for a client project and has a holiday according to client calendar, then user can enter the client holiday time card for the respective day.



3. Enter the hours for the respective admin/org training/org meeting tasks and click on Submit. *Note: Status shows as* **Pending** *till the user submits the timesheet.*





4. Once the Time Sheet is submitted, user receives an email notification. It will flow to the IRM or Project Manager, weekly, for approval.

Note: Status shows as **Submitted** once the user submits the timesheet.

Hi Priyanka ., Your timesheet has been submitted for t...

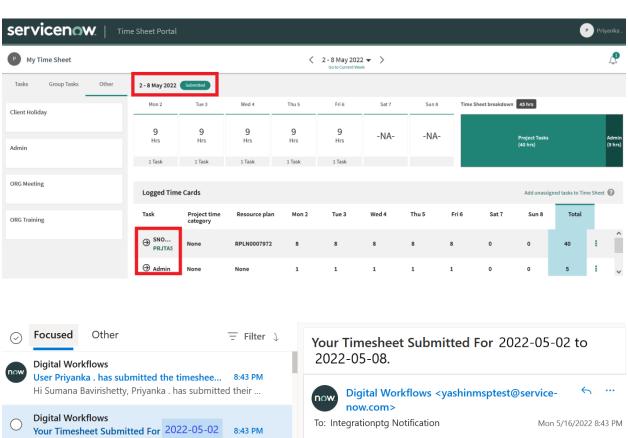
Priyanka . has submitted time card for 2022-... 8:43 PM

Hi Prashant Singh, Priyanka . has submitted time card f...

Your Timesheet Submitted For 2022-05-09 to... 8:36 PM Hi Soumya Penuguvvi, Your timesheet has been submi...

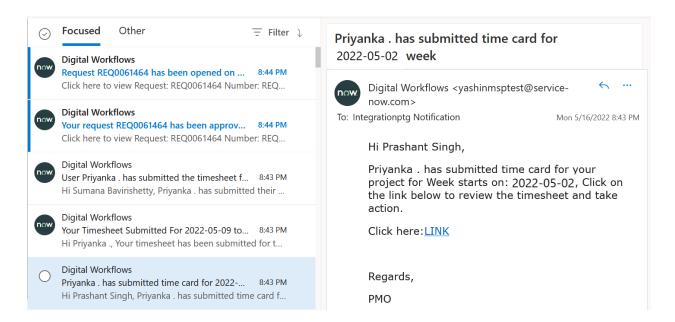
Digital Workflows

Digital Workflows

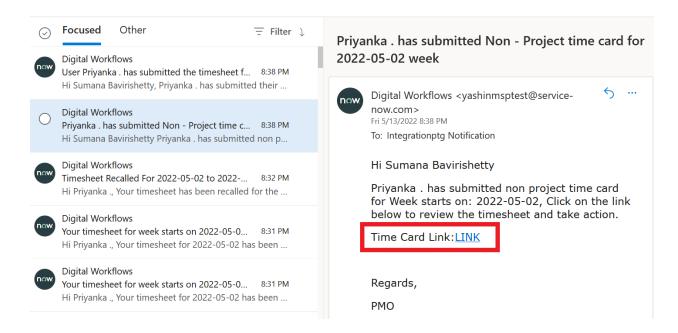




5. If the User submits Time Sheet under Project task, Project Manager receives an Email notification with a Link as below.

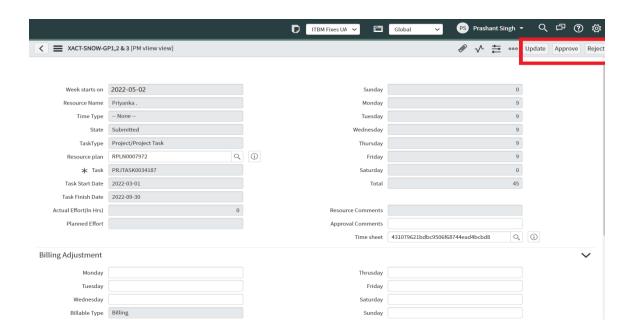


6. If the User submits Time Sheet under Admin/Org Meeting/Org Training, respective IRM receives an Email notification with a Link as below.

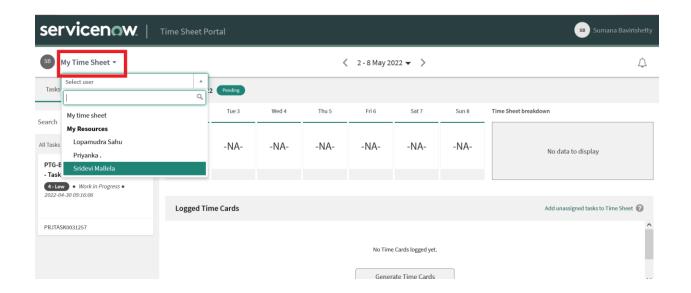




- 7. If the clicked on the Link > Project Manager is navigated to Pending Approval Manager Page where the PM can view and approve the users' timesheets which are pending for approval.
- 8. Click on *Approve/Reject button*, all the tasks for a resource on a weekly basis will be approved.

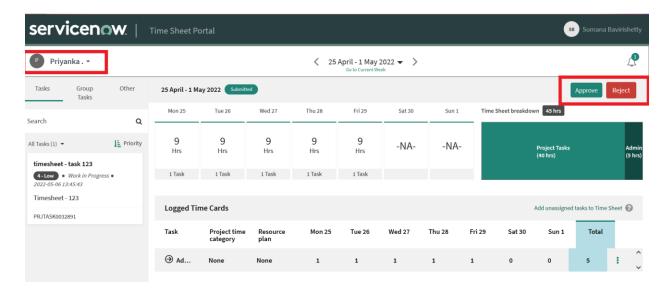


9. IRM can approve the time sheet using the Link provided in Email. Click on the Link to navigate to time sheet portal > click on My Time Sheet dropdown option as given below:



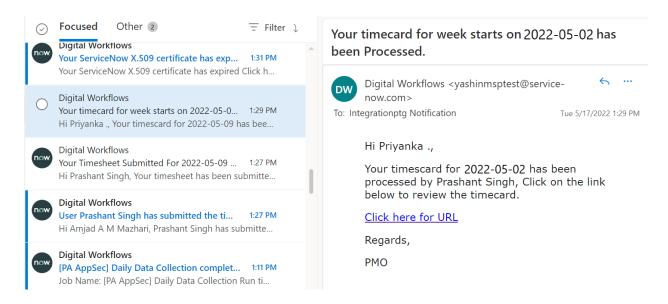


10. Select the resource from the dropdown and select the calendar for approval and click on Approve/Reject.



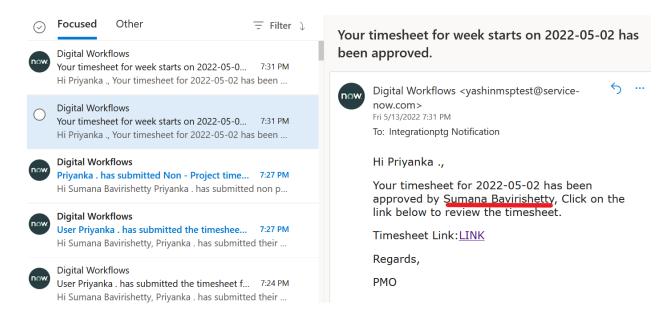
Recall Timesheet

11. Once the timesheet is approved by the respective Project Manager, user receives an email notification.

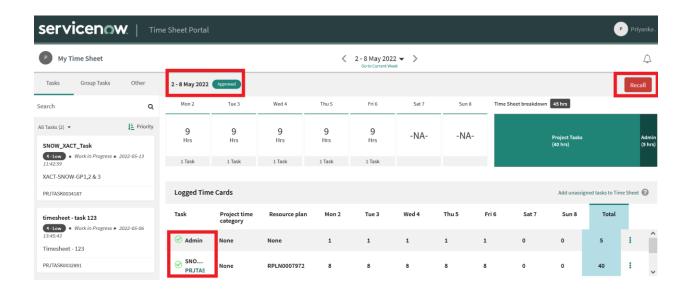




12. Once the timesheet is approved by the respective IRM, user receives an email notification.

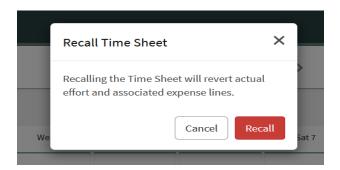


13. Once the timesheet is approved by the respective Project Manager/IRM, user can recall their timesheet if any changes are required.

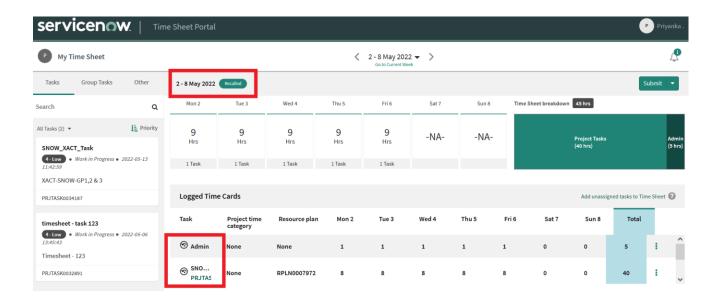




14. Click on Recall button to make any changes required in the timesheet. A pop-up window is displayed.

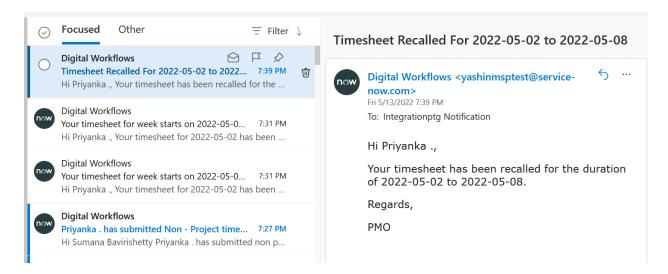


15. When the user clicks on recall button, the Status is changed from **Approved to Recalled**.

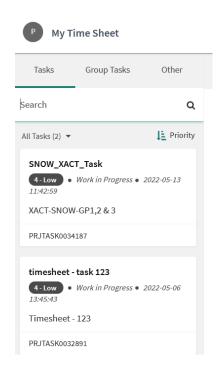


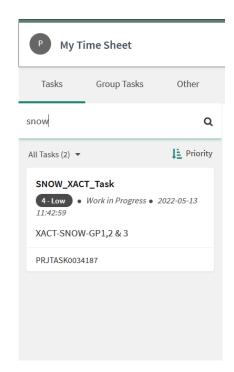


16. When the user recalls the timesheet, email is triggered to user about the recalled timesheet.



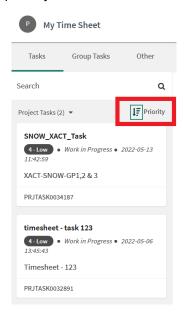
17. If clicked on Search > Enter the name of the project task, if there are multiple tasks.



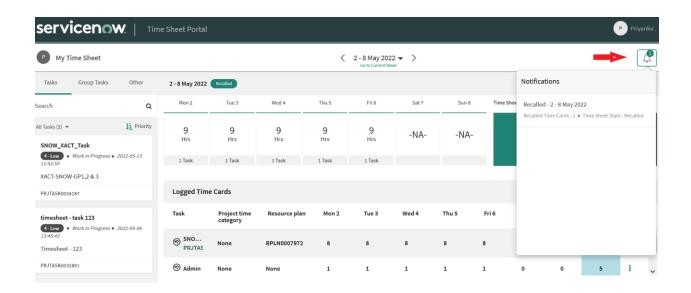




18. If Priority is selected > the bar which is high, shows the task has high Priority and the bar which is low, shows the task has low priority.

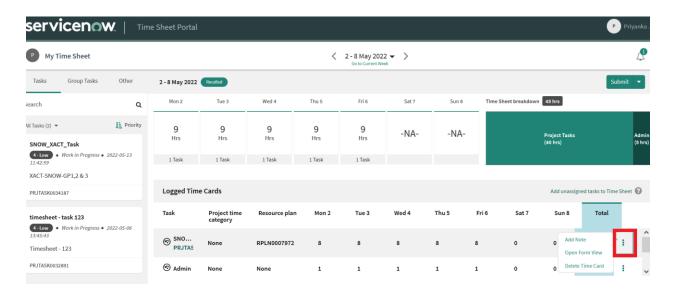


19. If clicked on Bell icon > Notifications are appeared > click on the displayed notification, redirected to that particular week.

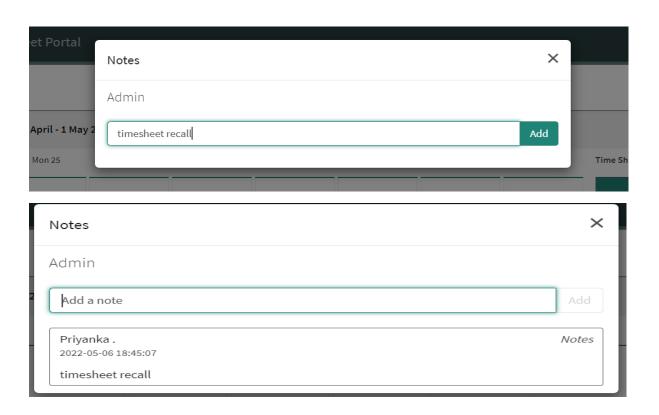




20. If clicked on More Actions (3 dots), user can add note, open form view and delete time card.

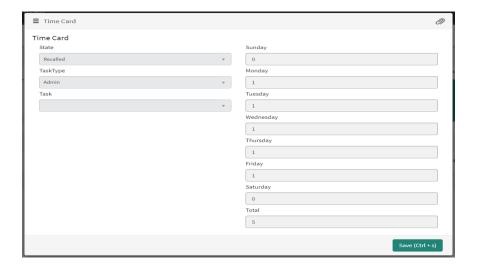


21. Click on Add note to add notes.

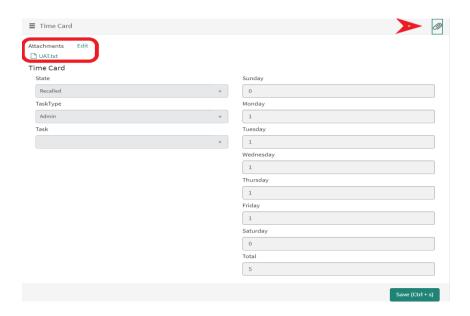




22. Click on Open form view, a popup window is displayed

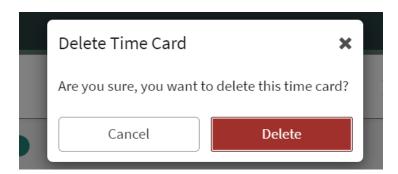


23. User can add the attachment and save the form.





24. Click on Delete time card to delete a specific task, a popup window is displayed, if clicked on delete the record gets removed from the logged time cards.



Note: If the User is on leave, Time Off is applied in infogram and once the approval is done, the record should reflect in ServiceNow from infogram.

Q & A:

- If a Project is of 8hrs and user has 9hrs 5days in Yash and applies timesheet for 8hrs in SNOW then what about the 1hr? should it be added as an admin task?
 Ans: User can add the extra 1hr under the admin task/ORG training/ORG meeting in timesheet.
- Under the client project is there any attachment option?
 Ans: In logged time cards > Click on more actions (3 dots on the corner) > Click on "Open view" against the timesheet line, then user can attach the file (attachment size 2MB, format any file)
- 3. What is admin task/ORG Meeting/ORG Training in Other?
 Ans: If the user is not allocated to any of the Project/Project task, user can fill the time card under admin task. If the user is attending any meeting or under training, user can fill the time card under ORG Meeting/ORG Training.
- 4. Can user submit the timesheet of current week?
 Ans: User should not be able to update timesheet for future date or current week or beyond the previous week. The Status will show pending for the current week.



5. How users can recall the timesheet? **Ans:** User can recall and edit the timesheet once the IRM/PM approves the timecard.

6. What is difference between **Approved and Processed state**?

Ans: Approved: This state will appear when timesheet is approved by IRM for Non-Project tasks (Admin Task)

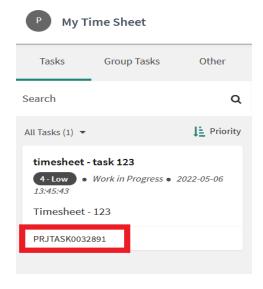
Processed: This state will appear when timesheet is approved by PM for the Project Tasks

7. Difference between timesheet and timecard?

Ans: Timesheet is the Portal where we fill time for the assigned time cards. Timecards are the tasks that we add in timesheet (Admin/ORG Meeting/ORG Training/Client holiday).

8. How to find Project Manager for your task?

Ans: Click on Project Task ID



It will open the task page >> Click on highlight Task name



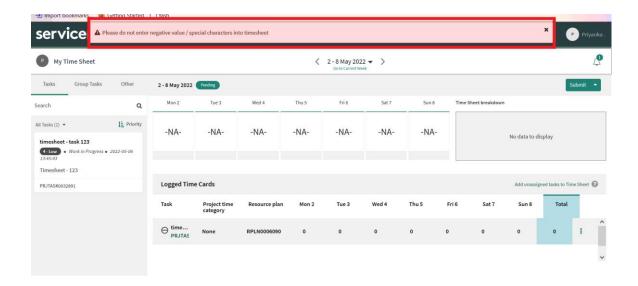


It will open the Project Page >> where the user can find all the details of Project and Project Manager name



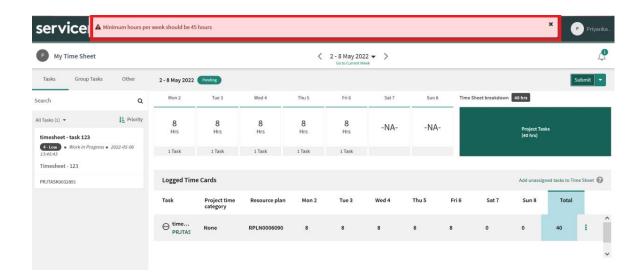
9. Can user submit negative values?

Ans: User cannot enter negative values, system will automatically throw a warning message.





10. User cannot submit the timesheet less than 45hrs per week, unless and until Time off is applied.



11. User cannot submit **{0} hours** on a particular day, the minimum hours per day should be 5 hours.

