



Alloc8 User Guide

# Timesheet Lock

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# Timesheet Lock

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## Overview

The introduction of the Timesheet Lock feature has been introduced to provide more security over editing Timesheet data and to prevent workers overriding Timesheets that have been edited by the scheduler or admin staff.

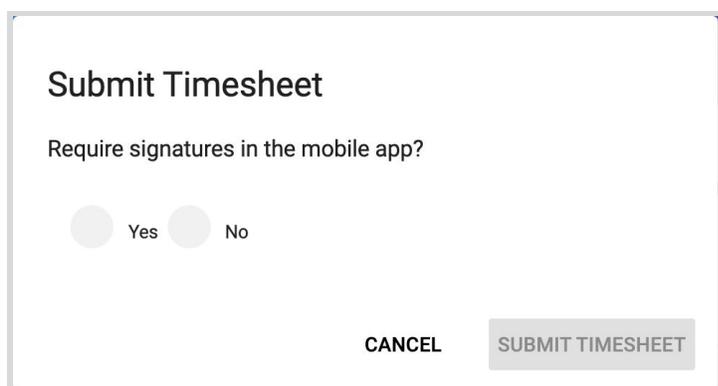
Timesheet Lock means timesheets will be automatically locked once they are edited or submitted on web without signatures required in the mobile app.

Additional permissions have been created to enable a web user to manually unlock and lock a Timesheet.

If a Timesheet is submitted on mobile, the Timesheet Manager can continue to edit and resubmit the Timesheet as normal, until the Timesheet is either locked on the web or the job is invoiced.

## Submitting or editing a Timesheet on web

Whenever a Timesheet is submitted for the first time, or edited on the web, there are two options: require signatures in the mobile app, or do not require signatures.



The image shows a dialog box titled "Submit Timesheet". Inside the dialog, the text "Require signatures in the mobile app?" is displayed. Below this text are two radio buttons, one labeled "Yes" and one labeled "No". At the bottom of the dialog, there are two buttons: "CANCEL" and "SUBMIT TIMESHEET".

Fig 1. Dialog shown when submitting or editing a Timesheet on web.

### Signatures are required

When you select 'Require Signatures', the Timesheet on both web and mobile will not be locked.

The Timesheet Manager will need to complete the timesheet with signatures via mobile as per current functionality.

### Signatures are not required

If you do not require signatures in the mobile app, the timesheet will be finalised and locked on both web and mobile. It will no longer appear as an 'Action Required' item in the Timesheet Manager's mobile app.

Once the timesheet has been locked, you will not be able to edit the timesheet.

Employee	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End
Chloe Price		1:00			5:00	
Rachel Price		1:00			5:00	

Fig.1 Locked Timesheet on web

## Submitting timesheet on web with incomplete required forms

If you have the Custom Forms feature, and there are incomplete *required* forms, a dialog will be shown to inform you that proceeding will not include the incomplete forms in the paperwork.

The Timesheet will then be locked after confirming the dialog.

There are incomplete forms on this job which will not be included in paperwork if you proceed. Do you want to proceed?

NO YES

Fig. 3 Submitting with incomplete forms dialog

Workers can continue to submit forms via mobile, however these will not be automatically added to Paperwork.

## Editing a locked Timesheet

A timesheet must first be unlocked to be edited and resubmitted.

A web user needs permission to unlock the Timesheet. Enabled permissions will show the

**UNLOCK TIMESHEET**

in the menu on the Timesheet page.

## Granting permission

1. Go to the *Administration* menu on web and click *User Access*
2. Select *Jobs* from the *Access Type*
3. Find and click the *Unlock Timesheets* tab
4. Search for the contact name and click *Add User*
5. Click the *Save* button

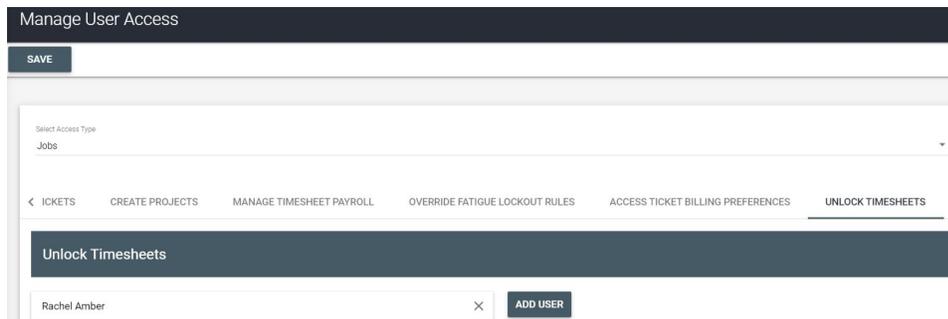


Fig.2 Permission to Unlock Timesheet

## Unlocking the Timesheet

Once you have permission to unlock the timesheet, you can navigate back to the Timesheet page and click 'Unlock Timesheet'. You can then edit the Timesheet as per current workflow.

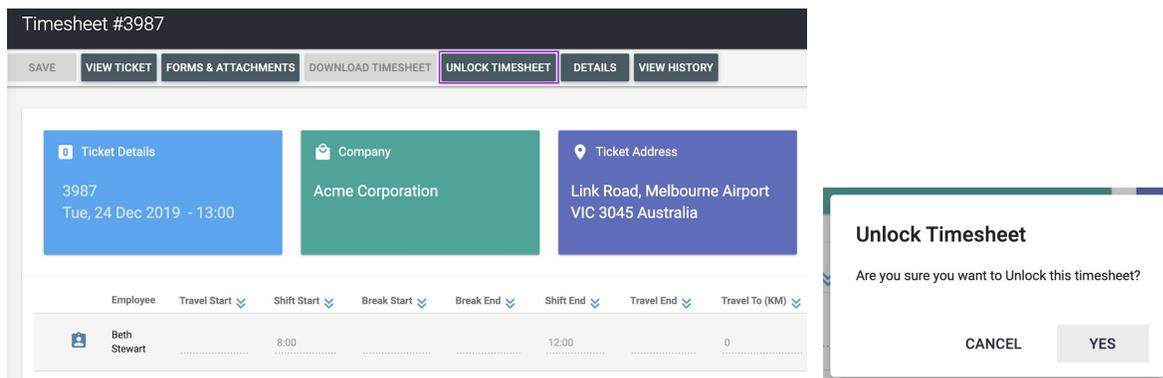


Fig.3 Unlock the Timesheet from the Timesheet page

## Manually locking a Timesheet

Submitting or confirming a Timesheet on web without requiring signatures will automatically lock the Timesheet, you do not need to manually lock it. However, you can choose to manually lock a Timesheet that has been submitted on mobile. Simply navigate to the Timesheet you wish to lock

and click  .

This will prevent the Timesheet being edited and resubmitted on mobile.

## How Timesheet Lock works with Alloc8 mobile

### Submitting a Timesheet on mobile

If a Timesheet is submitted for the first time on mobile, it can continue to be edited and resubmitted unless it is manually locked, or edited on the web (and no signatures are required).

### Managing paperwork after a Timesheet has been locked

Even if the timesheet has already been submitted and locked, you can still complete all the forms, and add or remove attachments on mobile. This will only generate a new version of the paperwork with the updated forms and attachments and will be emailed again to the site contact if the Timesheet is then resubmitted.

## Timesheet Lock and invoicing

### Timesheets where a job has not been invoiced

You can continue to edit a Timesheet until a job is invoiced, and can even edit from the 'Preview Invoice' page. When previewing an invoice, you can click the "Edit Timesheet" link shown in the invoice details next to the job location. This will redirect you to the Timesheet page, where you can proceed to unlock the Timesheet then edit and resubmit as usual.

The screenshot shows the 'Preview Invoices' interface. On the left, there is a sidebar with a 'GENERATE' button, a search bar, and filters for 'Dakleigh', 'Start Date' (06/02/2020), 'End Date' (06/02/2020), 'Client(s)', and 'Set Invoice Date'. There are also 'CLEAR' and 'DELETE' buttons. The main area shows 'Showing 1 invoice (filtered from 1 total entries)'. The invoice details include 'Abc', 'Description', 'SUPPLY OF TRAFFIC CONTROLLERS AT', '338-352 Bourke Street, Melbourne VIC 3004 | Edit Ticket | Edit Timesheet', '06/02/20 Docket 3968 01:00-05:00 X 1', 'Traffic Controller Night Rate 0-8 hrs', '06/02/20 Docket 3968', 'Site Allowance', 'Travel', and 'Authorized By: Traffic'. At the bottom, there are 'SUBTOTAL', 'TAX', and 'TOTAL' fields. A green box highlights the 'Edit Timesheet' link, with an arrow pointing to it from a label 'Edit Timesheet'.

Fig. 5 Preview Invoice

## Timesheets where a job has already been invoiced

When the invoice for a job has been finalised, the ticket and timesheets will be permanently locked. You will not be able to unlock the timesheet and the “Unlock Timesheet” button will become disabled.

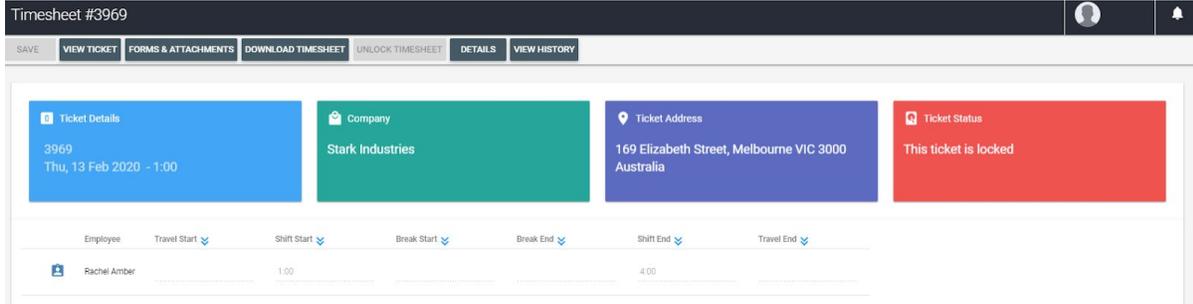
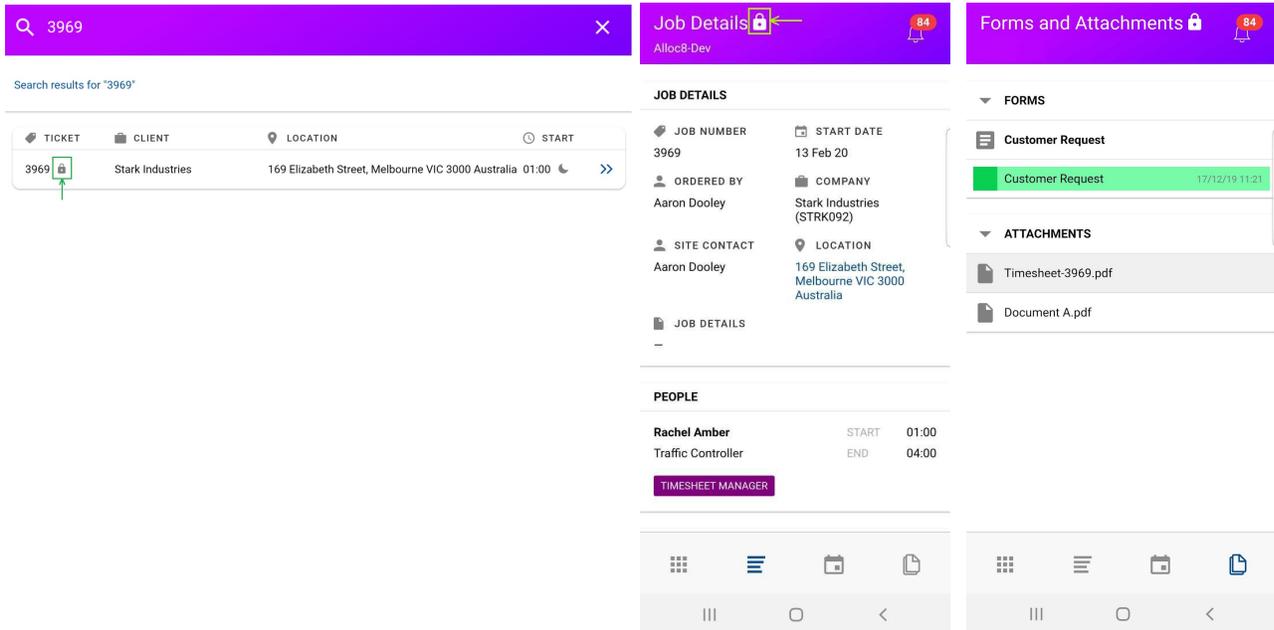


Fig. 6 Timesheet of an invoiced ticket

## Viewing invoiced jobs on mobile

Invoiced jobs on mobile display a padlock icon  next to the job listing in the Dashboard, and on the Job Details, Timesheet and Forms and Attachments tabs for that job.

Fig. 7, 8 and 9 Padlock icon on the Search Results/Dashboard, Forms and Attachments tab



Customer Request  
Customer Request

SUBMITTED AT 11:21 ON 17/12/19

**Customer Request Information**

**Customer Fullname**  
Rachel Amber

**Customer Address**  
123 Victoria Street, Melbourne VIC 3000 Au:

**Customer Request**  
Arrow Board Trailer

Sign here

Rachel

Clear

1

Save Changes

You will still be able to see the form submissions and attachments, but editing and submitting new forms or uploading attachments will no longer be allowed on mobile.

Fig. 9 Locked Forms and Attachments screen