DATABASICS Time User's Guide v4.0

A Guide to CALIBRE's Time Reporting Website

September 2019

CALIBRE
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Alexandria VA 22310

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Before You Get Started

There are a few important things to note about the DATABASICS Time system before you get started.

- Ensure the site is under Trusted Sites. Follow the steps below to check the internet settings and contact the IT Help Desk (ITServiceDesk@calibresys.com) if you need assistance.
    - Open Internet Explorer and from the top navigation menu, go to **Tools** then select **Internet Options**.
    - Click on the **Security** tab. Click on the **Trusted Sites** icon, and then click on the **Sites** button.
    - In the **Trusted Sites** window, ensure that the DATABASICS Time/Expense site (https://time.calibresys.com) is listed in the text box and then click **Add**.
    - Click **Close** and **OK** to exit the window.
- **Disable all pop-up blockers** for the DATABASICS Time. You will notice that many DATABASICS Time buttons do not work, or may simply beep if you have a pop-up blocker enabled.
- Direct all **computer configuration, log-in, connectivity or performance issues** to ITServiceDesk@calibresys.com.
- Questions about using DATABASICS Time should be sent to PayrollHelpDesk@calibresys.com.

Accessing DATABASICS Time

To access CALIBRE's DATABASICS Time system, go to Time & Expense by clicking on

icon on CALPortal on the left side or open your web browser and go to https://time.calibresys.com.

Logging In

DATABASICS Time is "Active Directory (AD) aware." Employees logged into the CALIBRE network (either direct connect or VPN) will not have to enter a password to enter DATABASICS. Employees off the network will have to log on using their CALIBRE passwords.

- **User ID:**

  - Employees: calibre\<CALIBRE network username> (This is your firstname.lastname)
- **Password:** <CALIBRE network password>
- If you require **log-in assistance,** contact ITServiceDesk@calibresys.com.
- After logging on, you will be directed to the Dashboard, which contains the following windows:
  - Announcements: This will contain some helpful hints to navigating the software and other current information. Please read these on first use and review periodically (see Figure 1).
  - Home Menu: This includes shortcuts to Current Timesheet, My Time Off, Create New Expense Report, Ad Hoc Reports, etc. The shortcuts are dependent on active modules, user role and application triggers (e.g. credit card transactions available) (see Figure 1).
  - Click on the **Timesheet** tab to begin a timesheet on the left side.

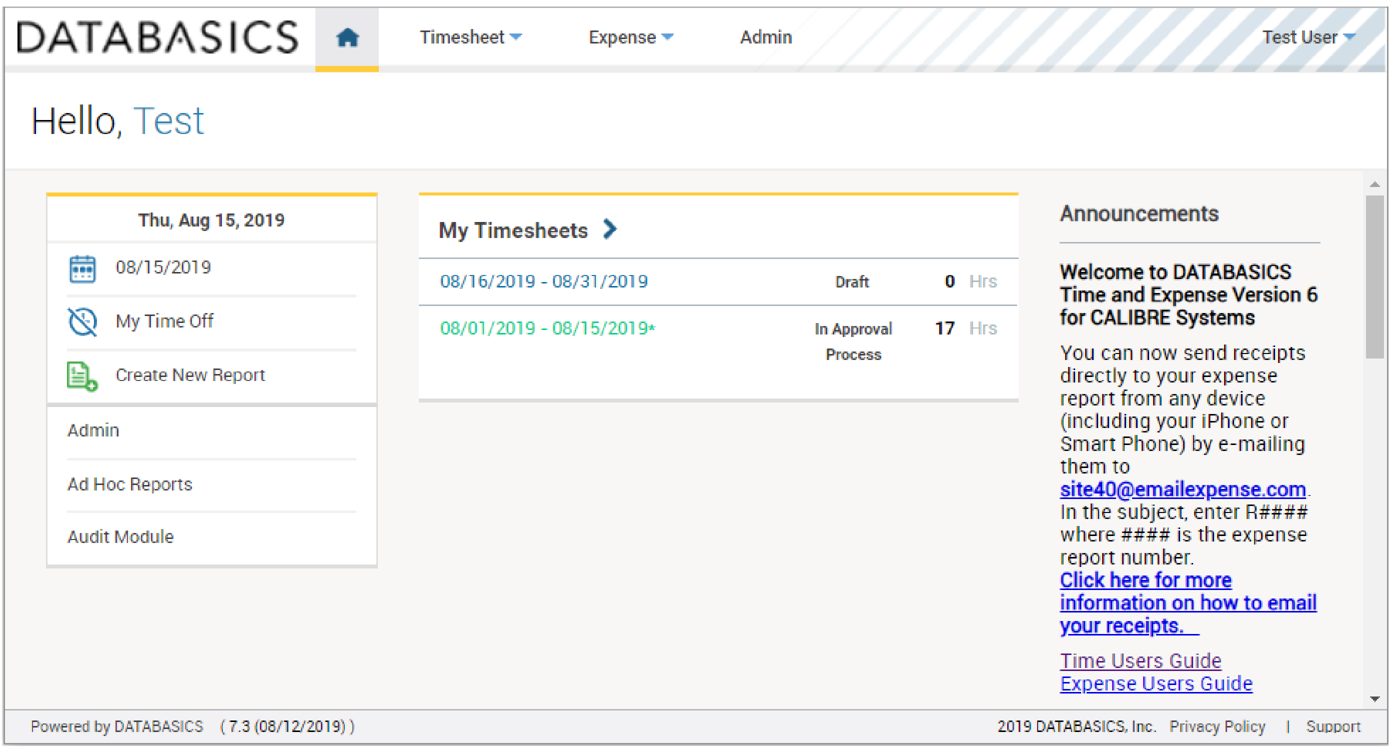


Figure 1: Announcements Home Menu

Reporting Time

In the menu on the top of the screen, click **Timesheet**. This will bring you to **the My Timesheets Screen** (see Figure 2).

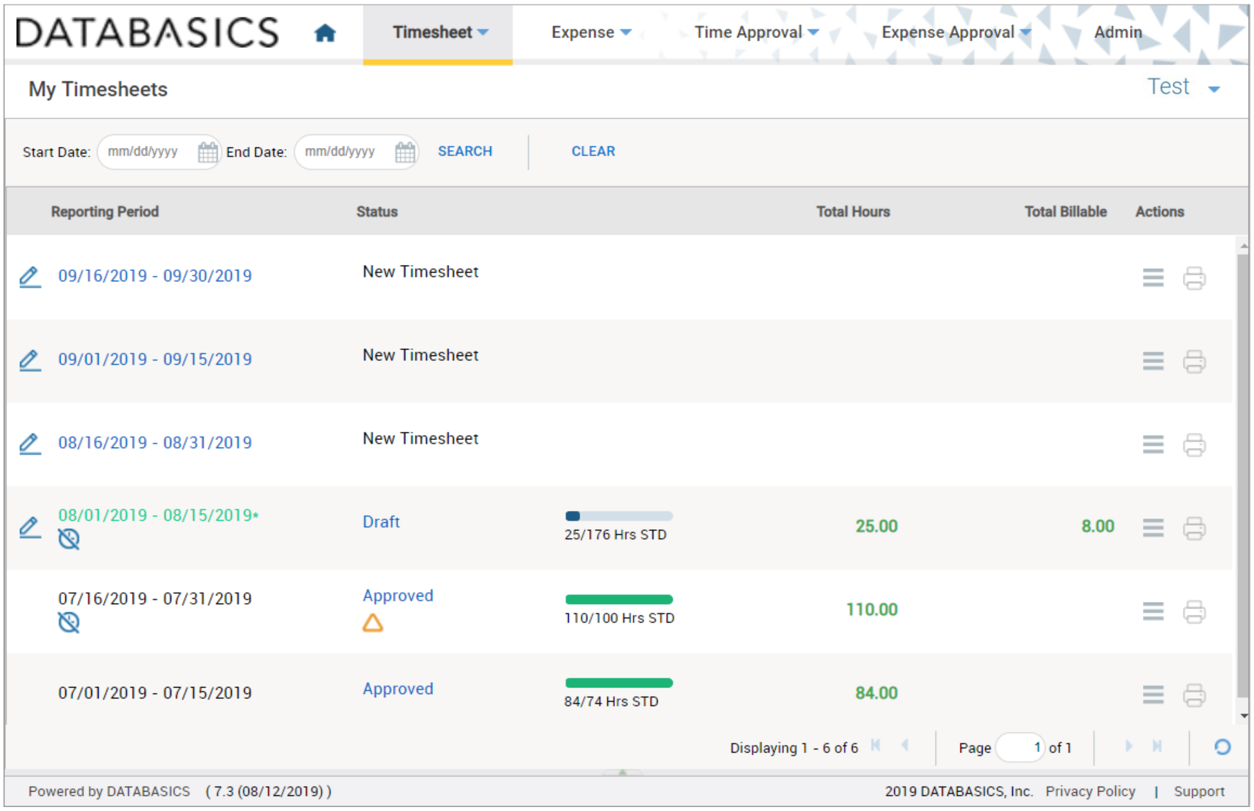


Figure 2: My Timesheets Screen

The **My Timesheets** screen (see Figure 3) allows you to view high level data regarding your timesheets. By default, this screen displays the Reporting Period, Status, Total Hours, Total Billable, any Notices and the last time the timesheet was modified.

The definition for each timesheet is described in the table below:

Timesheet Status	Definition
New Timesheet	The timesheet has never been previously opened.
Open	The timesheet is currently in use or it **has not been properly saved.**
Draft	The timesheet has been started and saved, but **has not yet been submitted**

Released	The timesheet has been released to the approval process, but no action has yet been taken by an approver.
In Approval Process	The approval process has begun, but is not yet complete. You may have resubmitted a rejected timesheet, or there may be another approval required.
Released w/ no App	The timesheet has been released, but there is no approver assigned to review or approve it.
Rejected	At least one line on the timesheet has been rejected by at least one approver.
Approved	All lines on the timesheet have been fully approved by all approvers.
Closed	The timesheet has been closed/archived and the user can no longer access it

To enter time on your **Timesheet**, access your timesheets by clicking on the **Timesheets** link at the top of the screen. Click the period ending date of the timesheet you wish to add time.

If the timesheet is new and auto-populate has been enabled, the timesheet will auto-populate lines selected in the Favorites List (See Timesheet Favorites). Otherwise, the new timesheet will be blank.

If you are accessing a timesheet you worked on previously, it will open with the data since you last saved the timesheet.

If you wish to view timesheets **outside of the date range displayed**, you may use search on top of the page:

- Enter the **Start Date** and **End Date**.
- Click **Search** to view timesheets that satisfy the entered criteria.
- You may select on **Enable Preview** icon under **Actions** on the right or
- You click on the **Timesheet Report** from the drop down near **the printer** icon .

<u>Time Entry</u>: To **add time**, select the entry field that corresponds to the line and date you want to add time.

- Click on a timesheet period to begin entering your time.
- Click the **Add** button to add the first entry for the timesheet.
- Enter a Time Code, WBS, and your hours in the corresponding fields.
- To look up a specific code, click on the search icon next to the corresponding field.
- To save your entry, hit the Enter button on your keyboard or you can use the save icon .
- To add more lines, click the **Add** button.
- When done, click on **Save as Draft & Exit.**

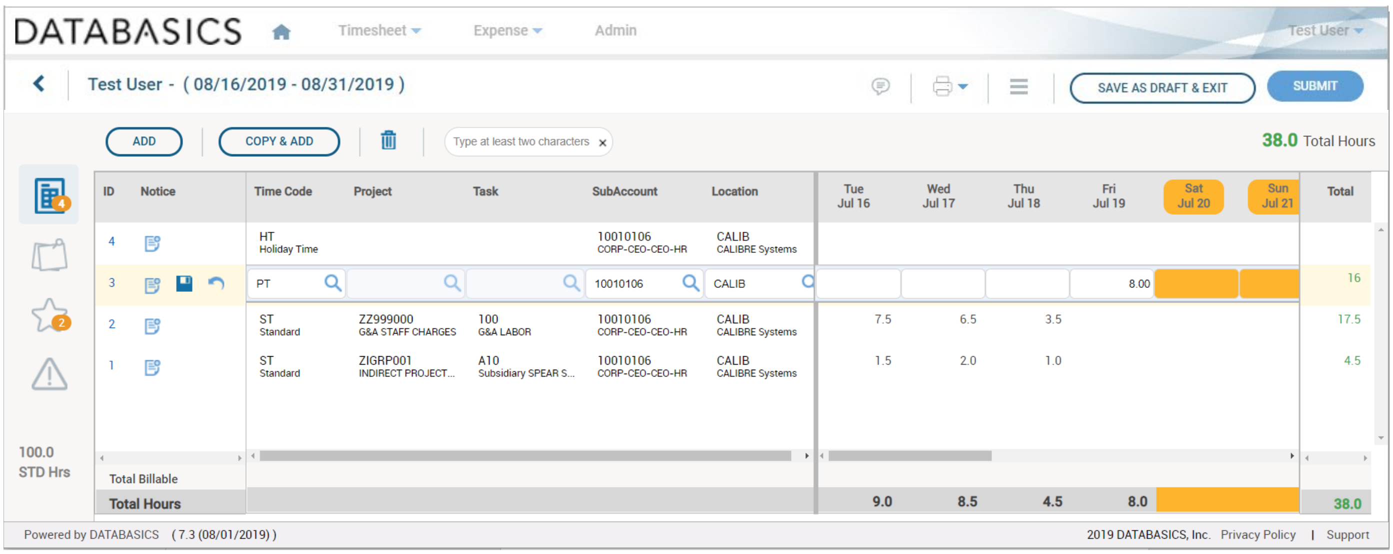


Figure 3: My Current Timesheet Screen

To begin reporting time follow the numbered steps below.

1. You must first select a **Time Code** to identify the type of hours you are reporting. The default entry will be "**ST**" for **Standard Time**. This will apply to most of the time you charge when working a typical day.

   If you are charging to Administrative Leave (**AT**), Leave Without Pay (**LWOP**), or Personal Time Off (**PT**), you will need to change this code. To do so click the **magnifying glass** icon to the right of this field to view and select other Time Codes.

   In the popup window that appears, click on the select icon (see Figure 4).

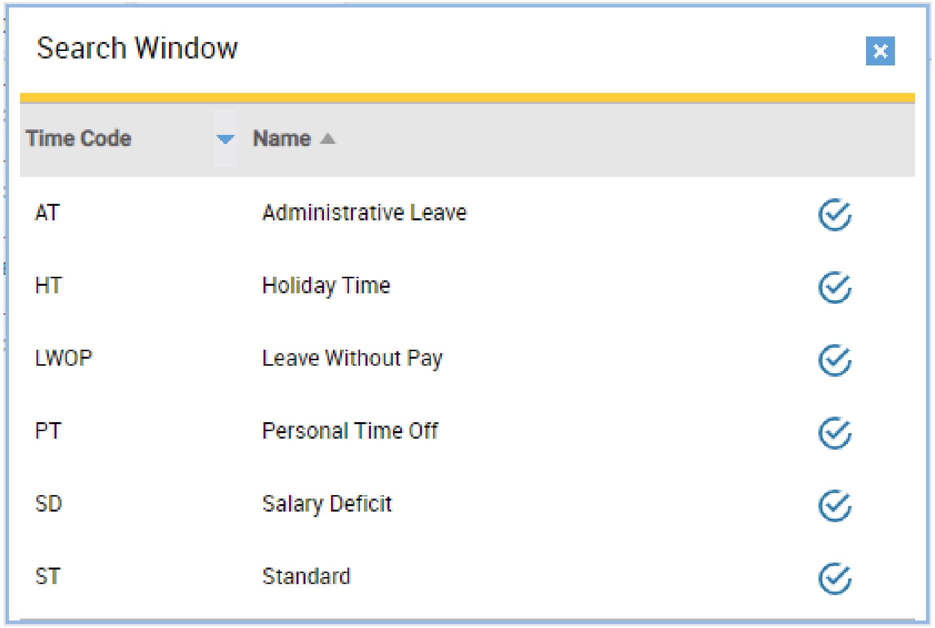


Figure 4: Time Code Selection Screen

2. If you are charging **Standard Time**, you **must** select a project that applies to the hours you are reporting. If you are charging to any of the other Time Codes, you can skip this step and proceed to step #4. You can search your project by clicking on the **magnifying glass** icon to the right of this field.

3. To search for available projects (see Figure 5), click the **magnifying glass** icon to the right of the "**Project**" column. In the popup window that appears in the "**Find**" field type in the first few characters of your project. In the example used in the screen captures to follow, we are searching for ZI000013 so we entered a search for "ZI". Now click the **Search** button.
   Start typing the code or the name directly in the field to see the list of potential matches. If a match is not found click on the search icon next to the corresponding field.

   - Enter search criteria in the **Find** field.
   - Click on the **Search** button
   - Click on to drill down to the next level.
   - Click on to select and copy the code(s) to the timesheet.

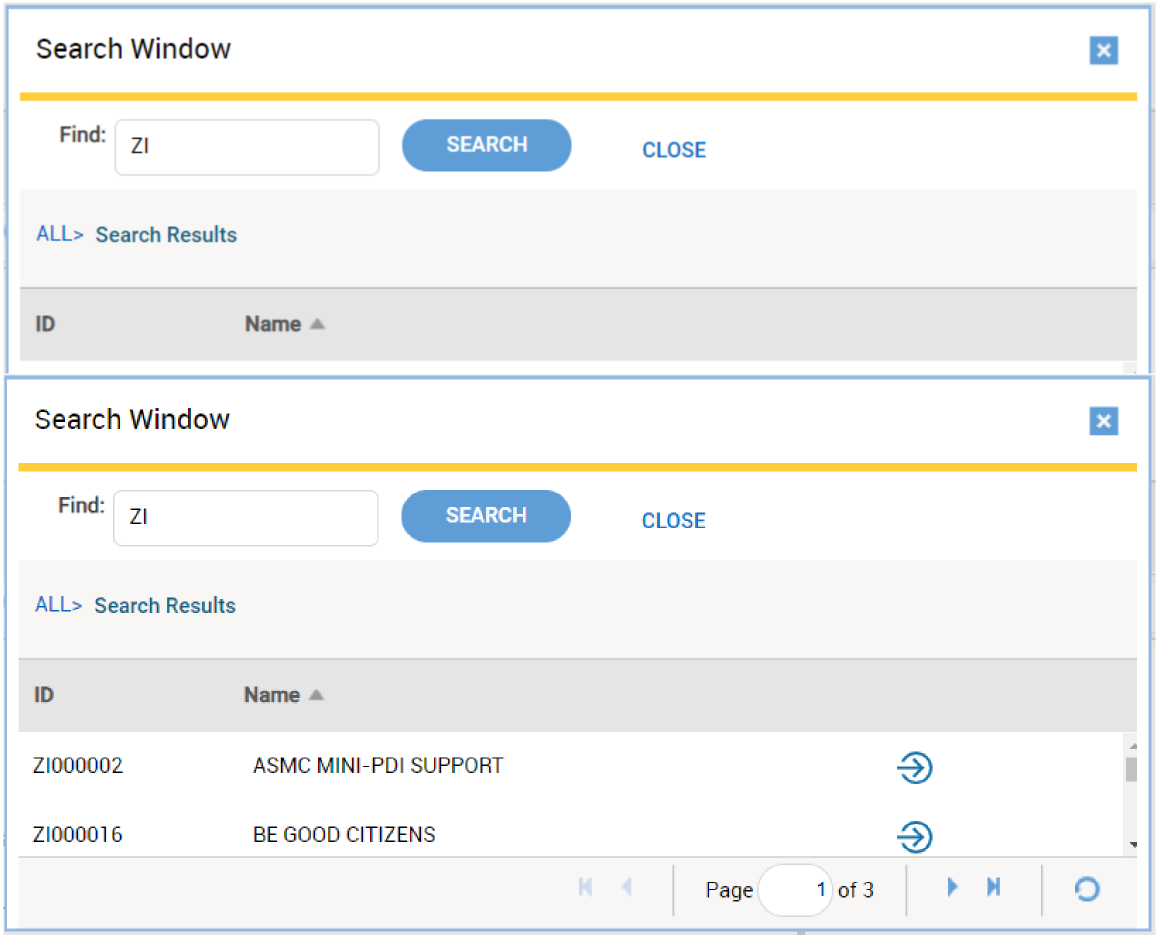


Figure 5: Project Search Screen with Search Results Displayed

4. The results matching your search parameters will now be displayed. Use the scroll bars to view all of the results. Once you find the correct project, click on to select to drill down to the next level.

5. After you have selected the correct project, the next window to appear will display the task codes that are associated with this project (see Figure 6). Please note that the default sort sequence is by Task Name. Select ID to resort by Task ID. To select a task code, click to select the Task Name. *NOTE: Some projects may only have one task associated with them; however, you must still select a task code.*

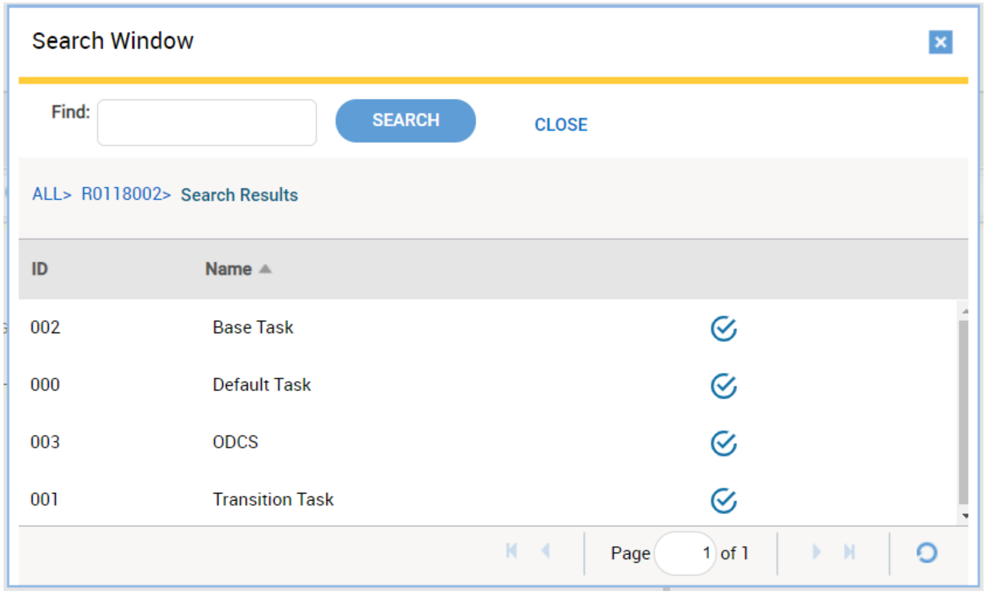


Figure 6: Project Code Search Screen with Project Tasks Displayed

6. You will then return to the timesheet screen. Notice that the “Project” and “Task” fields are now populated. Click “**Save**” icon to save the project (see Figure 7).

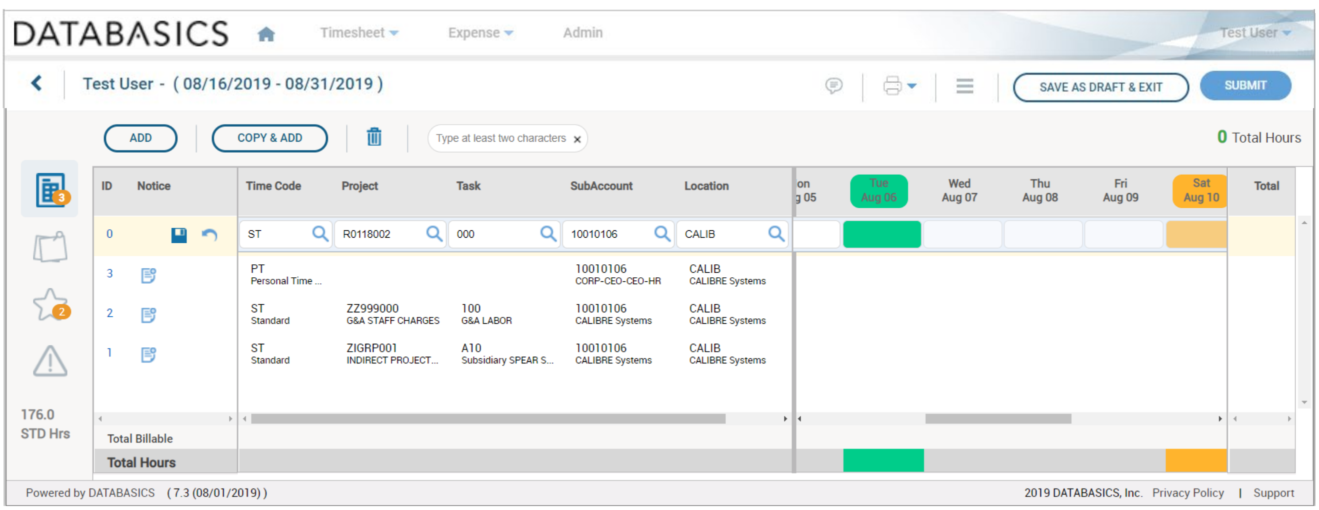


Figure 7: Timesheet After Project & Task Codes Have Been Added

7. If you are charging a normal project, you will not have to change your subaccount (in fact, if you change it, **the system will change it back to your default subaccount upon Validation**). For those of you charging to an indirect project (generally ZZ99xxxx), you change only the first digit of your subaccount to charge the pool for which you worked (see Figure 8). Typically, this would only apply to Directors, Vice Presidents, Corporate Officers, and those directed to do so by their supervisors. If this does not apply to you, skip this step and proceed to step #8. Please note the difference between charging the pool for which you worked and your default pool. It

is important to charge the pool(s) that you support, not the pool where you are located. Directors and VP's generally support multiple pools, as they have employees in more than one pool, and should therefore charge multiple pools.

Pool	Description
1	Corporate (CORP)
2	Client (CLIENT)
3	Overseas (OVS)
4	Technical Support (TECH)
6	Material Handling (MH)
7	General & Administrative (G&A)

Figure 8: Subaccount Pool Table

8. Now you should move to the right side of the timesheet screen and enter in your work hours. Type in the appropriate hours for this day and project. When you click on another part of the screen, your current totals will appear for the project, day, and pay period (see Figure 9).
   Click "**Save**" icon to save your entry on the current timesheet.

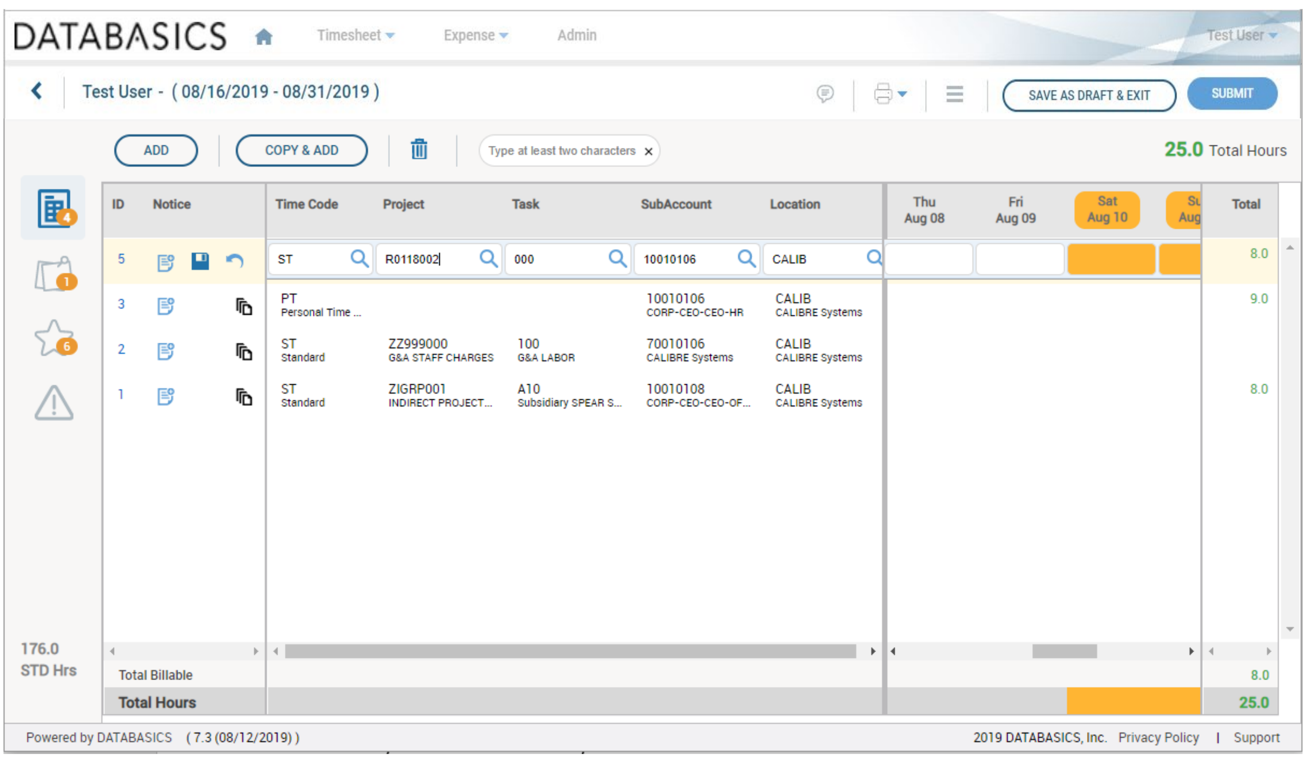


Figure 9: Timesheet Displaying Project, Day, and Pay Period - Edit Screen

9. CALIBRE's standard work days are M-F, with an understanding that many do not work that schedule. All salaried exempt full time 40/32/20 hour employees who do

not complete a timesheet entry at the end of a work day will receive a timesheet reminder email. Timesheet Approvers for those that do not complete a timesheet entry by the early morning of the next day will receive an email. You can avoid these e-mails by reporting **zero (0) hours**, as shown below.

10. There are numerous reasons why you may want to **report zero (0)** hours on a standard work day. Examples of these situations would include the following:
    - You have accumulated enough overtime during the month to meet the required hours, and choose to take an unpaid day.
    - You have an approved compressed work schedule (e.g., working 10 hour days 4 days each week, instead of 8 hour days 5 days each week).
    - You work a full time 32-hour week schedule.
    - You work a full time 20-hour week schedule.

    If you want to **report zero (0) hours** for a standard work day, select "**Notes**" icon in the **left menu bar of your timesheet** and a Timesheet Notes box will appear (see Figure 10). Change the Purpose to "**Non-Work Day**", enter your notes, the **Start Date, End Date** and hit "**Apply**" (see Figure 10). This will prevent the reminder e-mails from being sent to you and your Timesheet Approver. If you neglect to add this note, and you and/or your supervisor receive these e-mails, don't worry. These e-mails are purely for you and your Timesheet Approver's information. There is no penalty as long as you are reporting your actual hours on a timely basis. Additionally, notes can be added to specific range of dates on any line.

    - To enter notes for specific hours, click on the note icon for the line you wish to add a note.
    - In the pop up window, add the notes and select the date range this note is applicable.
    - Click the Save & Close button when finished.
    - To view all the notes on a timesheet, click on the Notes tab on the left.

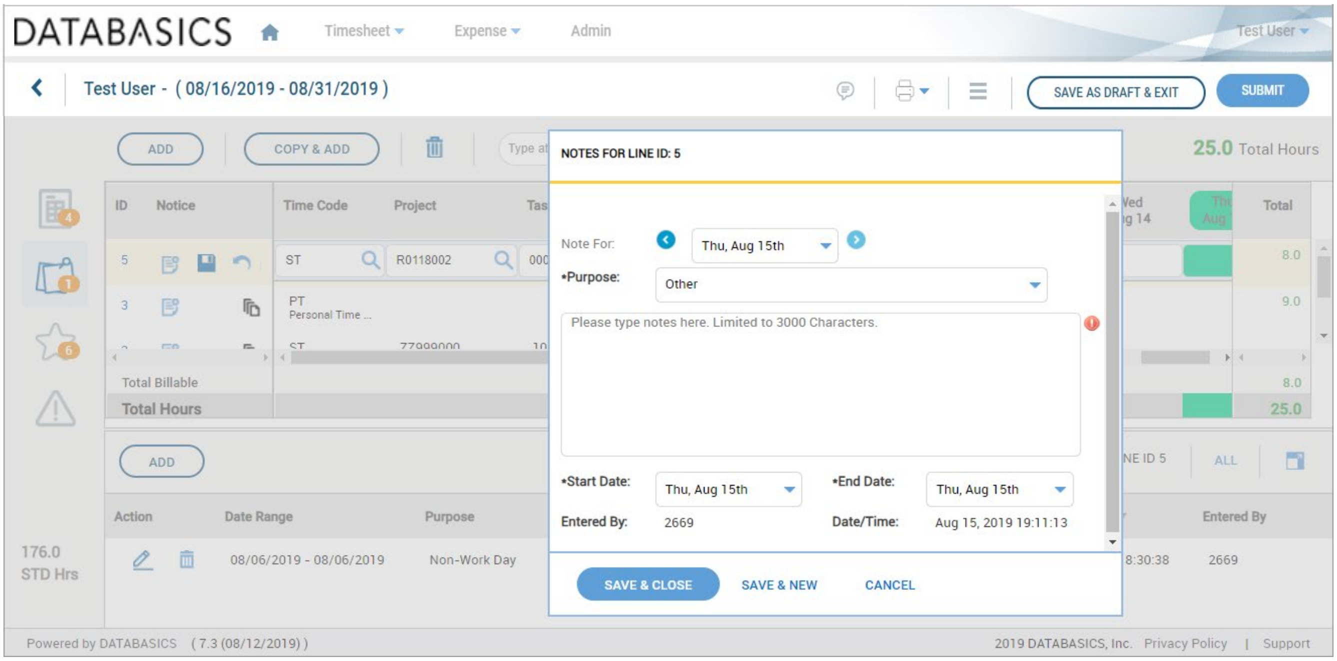


Figure 10: Timesheet Notes

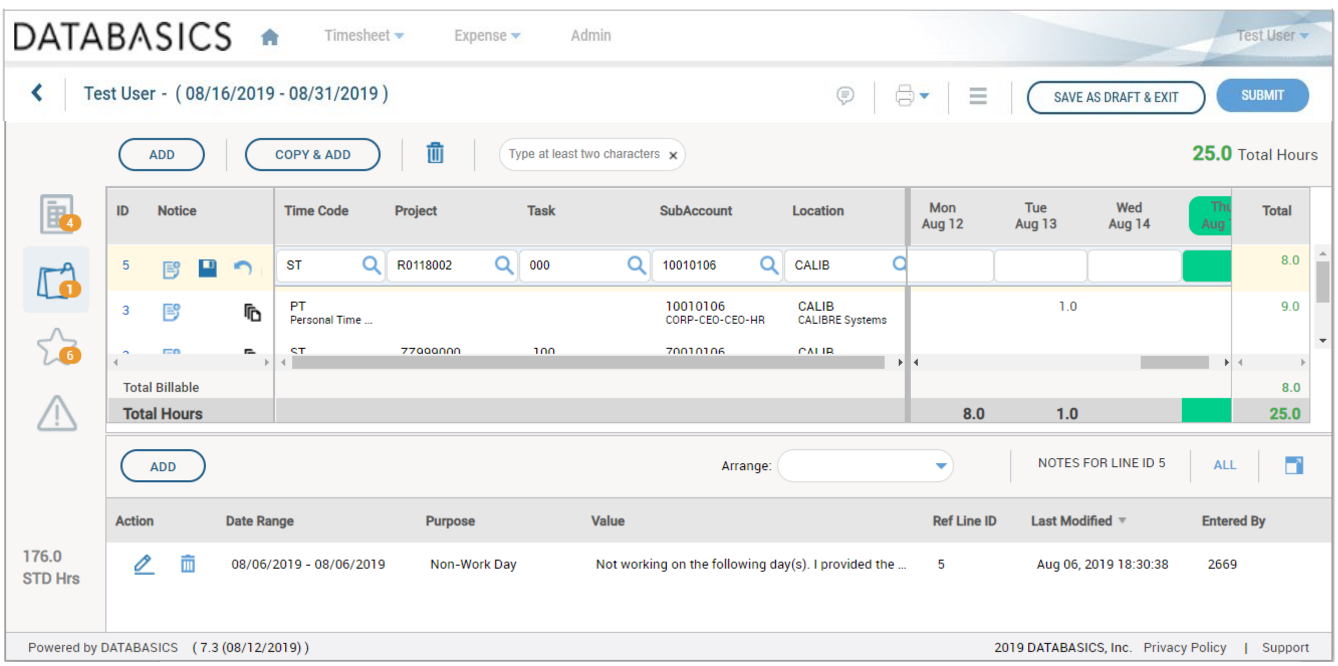


Figure 11: Timesheet Summary Note specifying Non Work Day

11. If you need to add another Time Code or project to your timesheet, click **Add** button to create a new line. A new row will be added to your timesheet. Follow the steps above beginning with step #1.

12. Leave Without Pay (LWOP)

    If you add **LWOP** Time Code, you will **require** entering **Notes** **for the reason the use of LWOP hours on your timesheet.**

    Please be aware that **LWOP must be taken for eight (8) hours per day** on a day in which the employee does not perform work and does not charge any other leave.

    Additionally, **before the use of Leave without Pay,** employees **must** complete a CALPortal Leave request on CALPortal. Once the request is submitted, it will channel the requests to the appropriate parties for approval and provide both HR and Payroll a copy of the Approval for our records.

    For more information, you may refer to CALIBRE P&P section 2.9 - Leave Without Pay.

13. Admin Leave – Military Reserve Duty

    If you add **Admin Leave (AT)** Time Code, you will **require** entering **Notes** **for the reason the use of Admin Leave hours on your timesheet.**

    Additionally, **before the use of Admin Leave (AT),** employees **must** complete a CALPortal Leave request on CALPortal. Once the request is submitted, it will channel the requests to the appropriate parties for approval and provide both HR and Payroll a copy of the Approval for our records.

    CALIBRE P&P section 4.11 – Administrative Leave allows **4 hours of Admin Leave per full day (8 hours)** of **Military Reserve Duty**. The balance can be recorded as either **PT** or **LWOP**. If you elect to record LWOP, you will have to **stagger the days**, as LWOP may only be charged for eight (8) hours per day on a day in which the employee does not perform work and does not charge any other leave. In other words, for a two day Reserve Duty, charge 8 hours each day; one day to Admin Leave, and the other to LWOP.

14. If you need to modify a line, click on the line you wish to modify and update the fields you wish to modify. Click "**Save**" icon to save the changes.

15. If you need to remove a line, click on the line you wish to delete by clicking on it then click **Delete.** Confirm by clicking "Yes" in the pop up box. You may provide correction note on the pop up box.

16. To properly exit a timesheet, choose one of the following options:
    - **Exit Without Save**: Exits the timesheet and **does not save** any changes made during that session. You may select icon on the top left.

- **Save As Draft & Exit**: Saves the timesheet and allows you to return to continue from the same point *(NOTE: Once you save and exit from the screen, you will be prompted to enter an explanatory note anytime you attempt to modify hours for prior days).*

- **Submit**: Begins the submission process to release the timesheet to approvers.

17. Click **Sign Out** on the drop down arrow in the upper right corner of the screen to log out of the system. *(**NOTE**: Closing the browser window prior to selecting one of these 3 options will result in the timesheet being stuck in the "**Open**" status. The system will behave as if you are still accessing the timesheet and **will prevent any other users from accessing it**)* (see Figure 12).

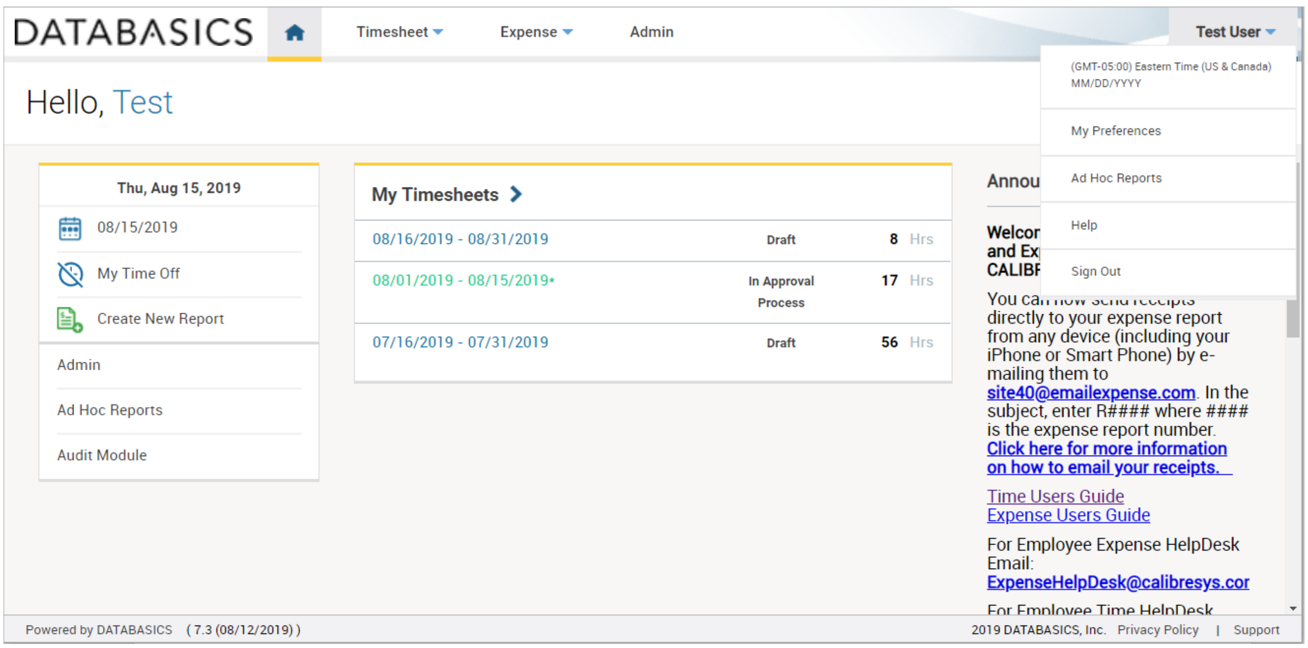


Figure 12: Sign Out

Closing Out Your Timesheet for a Pay Period

It's the **last day of the pay period** and **the end of the work day**. You have just input your hours for the day and you are ready to close out your timesheet and submit it to your supervisor for approval. Follow the steps below to complete this process.

1. Review all hours for accuracy and correct project charges. If you make any corrections to previously recorded hours on your timesheet, you will be required to enter a note detailing why the modification was needed.

2. Compare your hours charged with the hours required. At the left pane of your timesheet, your totals will appear in bold text (see Figure 13). The following information is available:
   - Total Standard Hour for the month (See on the left side bottom).
   - Total Billable hours in the timesheet (See on the below timesheet).
   - Total Hours recorded for the period (See on the right top under Submit button).

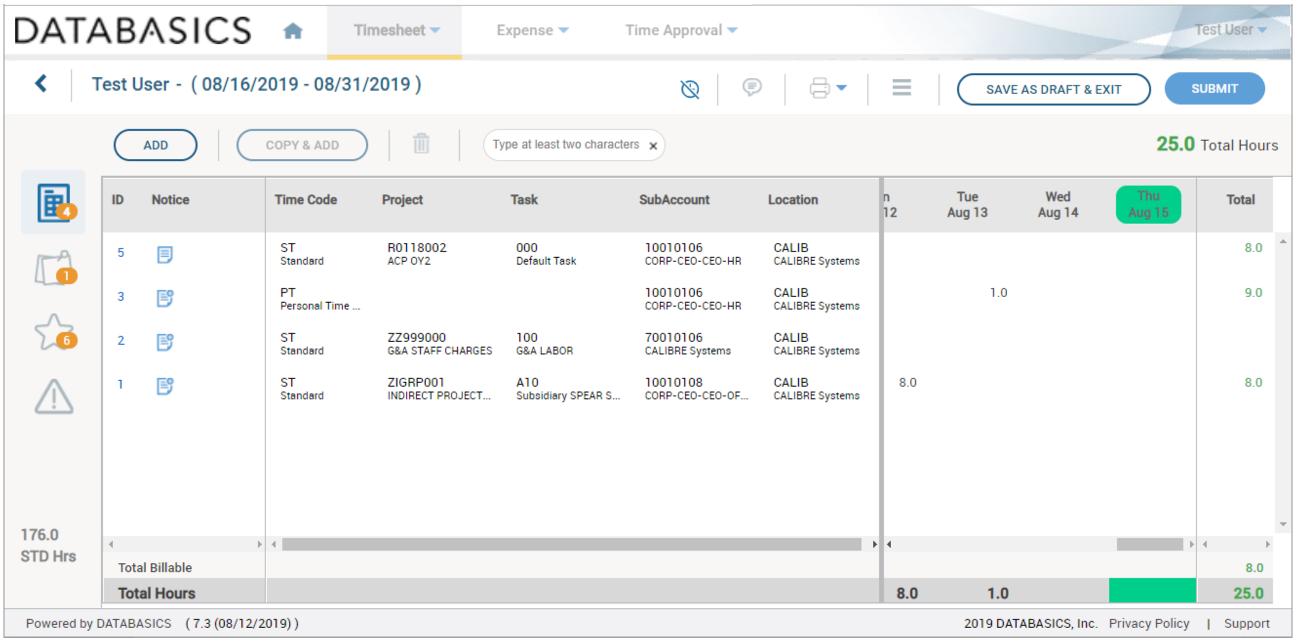


Figure 13: Timesheet Hours Totals

3. Once you have completed your timesheet and are ready to submit, click **Submit** button to begin the release process.

4. This will bring you to the **Confirmation field** (see Figure 14)
   This step ensures that the data on the timesheet is valid and will notify you if any policies have been violated. If a change needs to be made, select "**Cancel**" and highlight and click on the desired field and updating it. If any changes are made to the timesheet, you must click the **Validation** button in order to proceed. *(NOTE: If you have any concerns about your required hours, project, task or subaccount charges, you can click **Validation** on the left side of the timesheet screen at any time. You do not have to wait until submission time.)*

   At any time, you may click the **Validation** ⚠ tab to validate the timesheet. This will take you to the validation log where any validation errors or warnings will be displayed.

5. Once your timesheet passed validation, click "**Submit**" to continue.

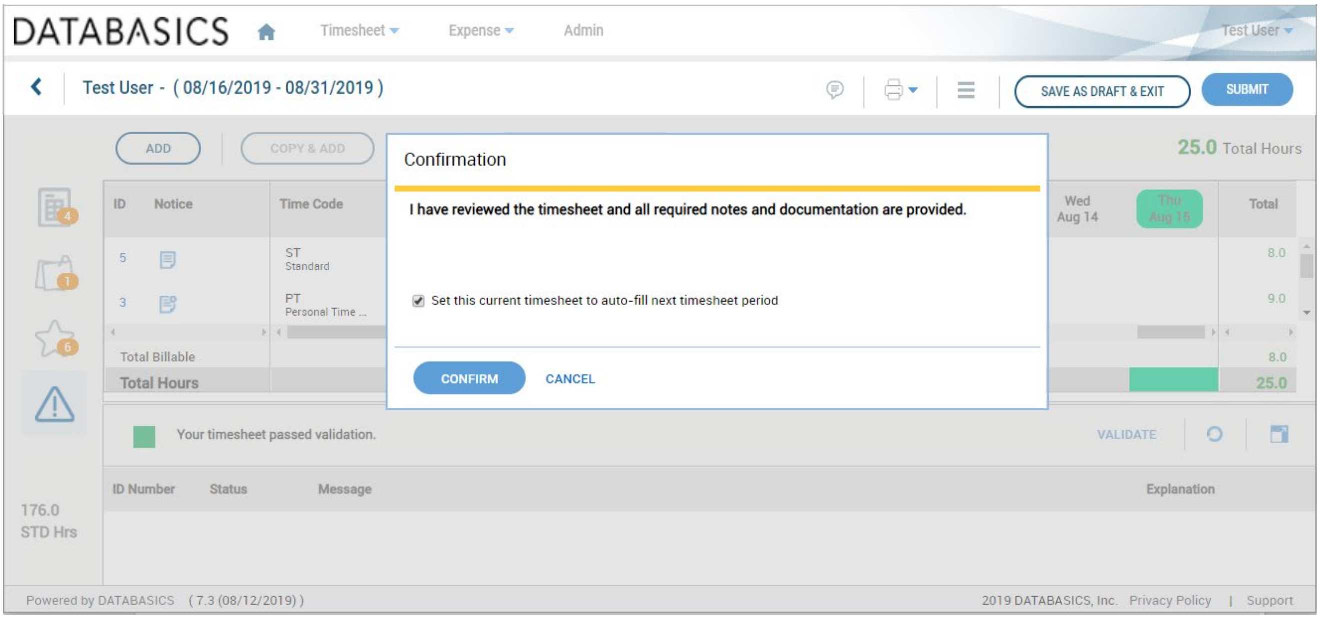


Figure 14: Timesheet Validation Confirmation Message

6. This will bring you to the **Confirmation** field. You may select "**Confirm**".
   If you wish to set the current timesheet to **auto-fill any new timesheets**, select the corresponding check box (**Set this current timesheet to auto-fill next timesheet period**). This will save all the lines with projects and hours charged to them to your Favorites list (See Timesheet Favorites). This will also auto-populate the next new timesheet you open with the lines the same lines.

   (NOTE: Only timesheet lines that have both a WBS/OBS structure and hours charged will be saved to your Favorites and be used to auto-populate future timesheets. Lines with no hours charged will not be saved or used to auto-populate a timesheet.)

7. Your timesheet is now in your approval queue for his/her review and approval.

Approval Teams

(For Timesheet Approvers Only)

Approval Teams consist of all employees whose timesheets and expense reports are reviewed and/or approved by one or more Approvers. Approvers can be given Approval or Review rights. This would allow for a Project Manager to approve all of their employees time and expenses, and for their Director to review, but not approve. This type of two tiered Approval Team would allow the Reviewer to see all members of his employees' Teams, and perform Timesheet Search and reports, as explained in the following sections. Teams can also have multiple Approvers if the normal approver is not on the internet for prolonged periods. We recommend against this type of double approval, as each Approver will see the timesheets in their Approval queue, which may cause confusion or inconsistent approvals.

Reviewers and Approvers can each have email notifications turned on or off, so that they will receive emails alerting them that an approval is necessary, or if the employee does not complete their timesheet on time. Secondary Reviewers and Approvers can have the email disabled, but all Teams will have at least one Approver with email notifications.

Please send your request to PayrollHelpDesk@calibresys.com to establish or make changes to your Approval Teams as you prefer.

Reviewing Timesheets for your Approval Team

(For Timesheet Approvers Only)

There are several ways for supervisors to review the time that their employees are charging. The first is called a **Timesheet Search**. It allows any Reviewer or Approver to see each timesheet for employees in their Approval Team. It is a very useful tool to quickly look for timesheets that are **On Hold** (**unsubmitted**) or **Released** (**unapproved**).

Within DATABASICS Time, select **Admin** from the main menu. From the main menu select **Utilities**. The menu option Timesheet Search will appear on the left side navigation bar (see Figure 15).

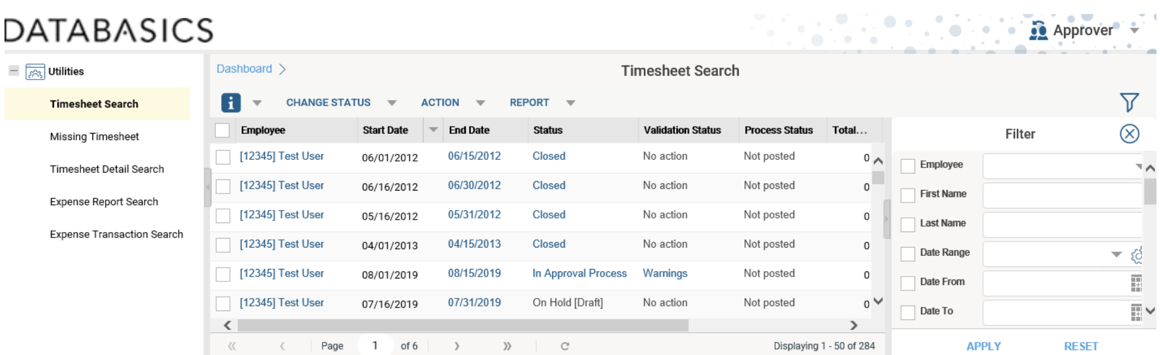


Figure 15: DATABASICS Time Utilities Menu Showing Timesheet Search

The following screen appears after click on **Timesheet Search**. In this example, the Approver has selected all On Hold (unsubmitted) timesheets for his Approval Team. This is the easiest way to see who hasn't completed their timesheets on a daily basis, or who hasn't submitted theirs (see Figure 16).

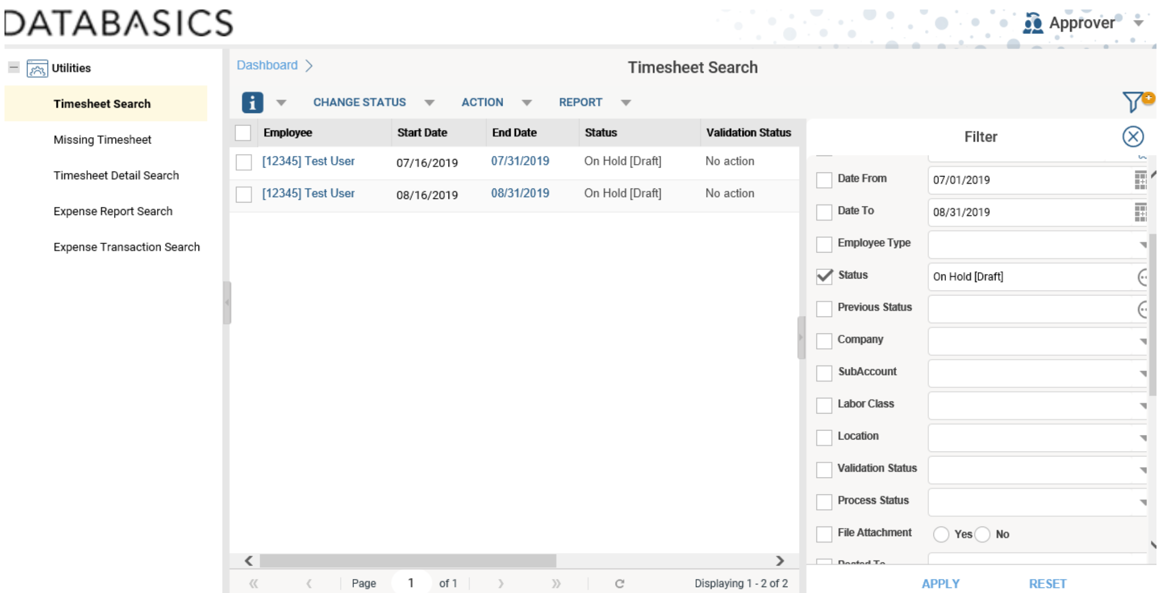


Figure 16: DATABASICS Time Utilities – Timesheet Search Options

Approving or Rejecting a Timesheet

(For Timesheet Approvers Only)

Once the employees in your Approval Team(s) have submitted their timesheets, follow the steps below to review and approve them.

1. Log in to the DATABASICS Time. Approvers have an additional menu item on the Dashboard called **Time Approvals**. Use this menu to view the reports in your approval bin.
   - **My queue:** Timesheets waiting for approval.
   - **My rejections:** Timesheets that you have rejected.

2. The next screen to appear will display all of the staff members who have submitted their timesheets for approval. To view a staff member's timesheet, click on the underlined link for that pay period (see Figure 17).

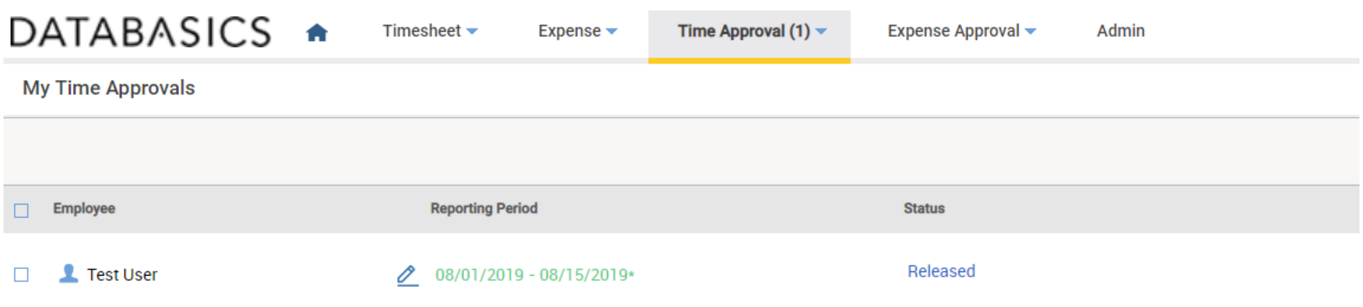


Figure 17: Time Approval Screen

3. The timesheet for that staff member will then display. Review the entire period for that timesheet by using the scroll bars (see Figure 18). Note the buttons at the top of the page to **Approve All & Exit** or **Reject All & Exit**.

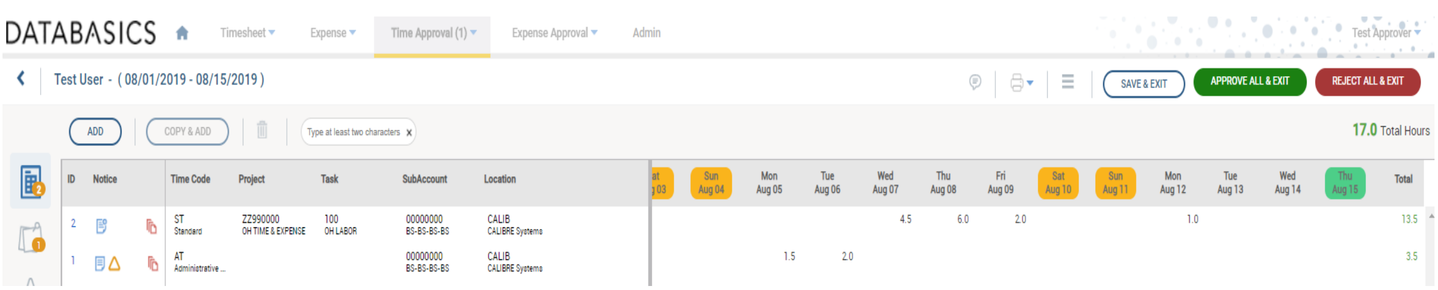


Figure 18: Timesheet for Approval

4. To review notes from the staff member, click Notes on the left side. Use the scroll bars on the timesheet to review the labor hour charges for the entire pay

period. After reviewing the timesheet you can approve the entire timesheet, reject certain lines of a timesheet, or reject the entire timesheet. Follow the steps below in a.-c. depending on what you want to do.

a. **To approve the entire timesheet** click the **Approve All & Exit** button.
   i. Click on the **Approve All & Exit** button. A "Confirmation" window will pop up (see Figure 19).
   ii. *Optional*: Enter any notes into the field.
   iii. Click on the **Finish** button.
   iv. You will be taken back to the **Time Approval** screen.

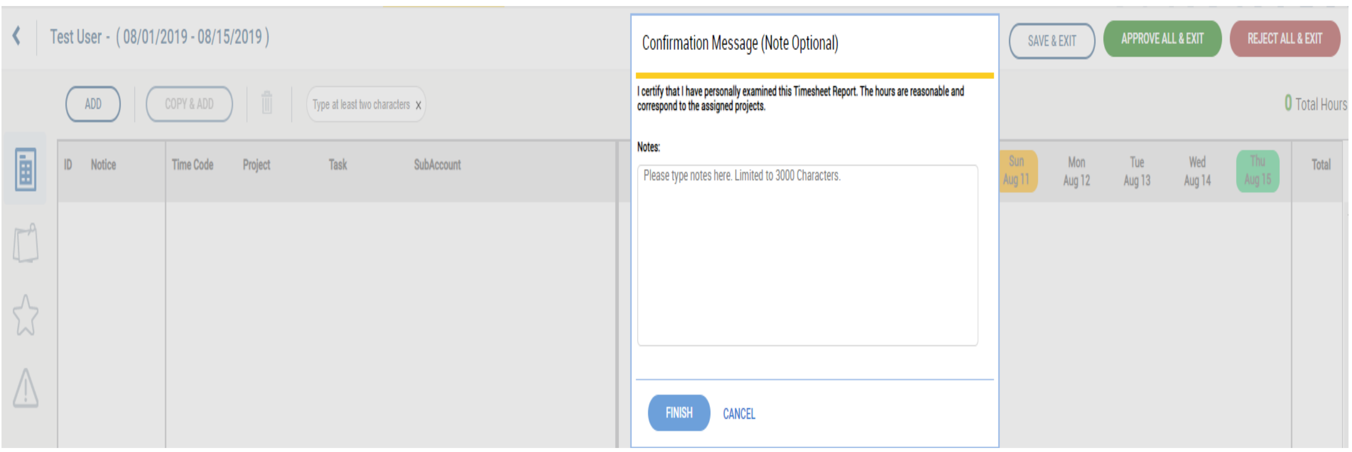


Figure 19: Timesheet Approval Confirmation Message

b. **To reject the entire timesheet** click the **Reject & Exit** button.
   i. Click on the **Reject & Exit** button. A "Rejection Notes" window will pop up (see Figure 20).
   ii. *Required*: Enter the reason why the timesheet was rejected in the notes field.
   iii. Click on the **Finish** button.
   iv. You will be taken back to the **Time Approval** screen and the report will be removed from your queue.
   v. The Timesheet will be sent back to the user who submitted it with the note explaining why the report was rejected.
   vi. If you wish to retrieve a rejected report, use the Query feature in the **Time Approvals** menu.

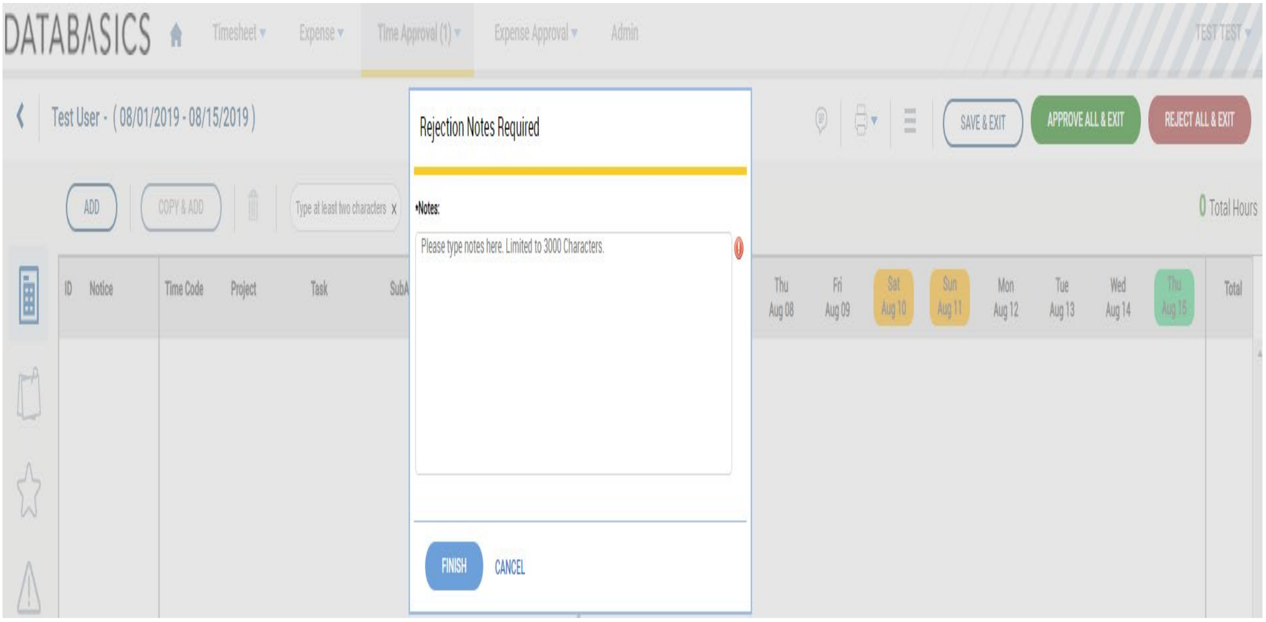


Figure 20: Timesheet Rejection Confirmation Message

c. <u>**To Approve or Reject by Line Item**</u>, right-click on the line you wish to approve or reject.
   i. Select either Approve (Approve the Line) or Reject (Reject the Line) from the pop up menu.
   ii. If you click Reject you will be required to enter the reason why this line is being rejected.
   iii. Click Save & Exit when you are done.

> ***Note**: If the approver rejects individual timesheet lines, then clicks:*
> - ***Approve & Exit**: the individual line rejections will be overwritten and the entire timesheet will be approved.*
> - ***Reject & Exit**: The entire timesheet will be rejected and the individual line rejections and their messages will be saved and sent back to the employee that submitted the timesheet.*

5. Click **Sign Out** in the upper right corner of the screen to exit and log out of the system.

Correcting a Rejected Timesheet

If your timesheet was rejected by your timesheet approver, you will be notified via email. To review the details of the rejection and make the appropriate corrections, follow the steps below.

1. Login to the DATABASICS Time and you will see in **Home** Dashboard notice of your **Rejected Timesheet** (see Figure 21) or you may also click on **Timesheets** and select **My Timesheet List** from drop down menu.

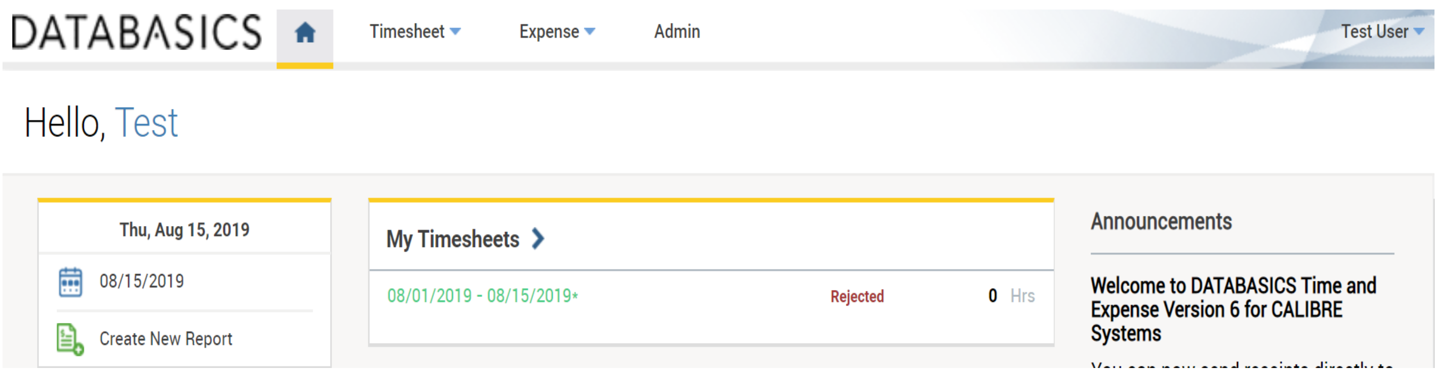


Figure 21: Dashboard Page Showing Rejected Timesheet

2. The next screen will display a list of your timesheets. Under the ***Status*** column you will see "**Rejected**" next to the timesheet in question. To access the timesheet, click on the underlined (see Figure 22).

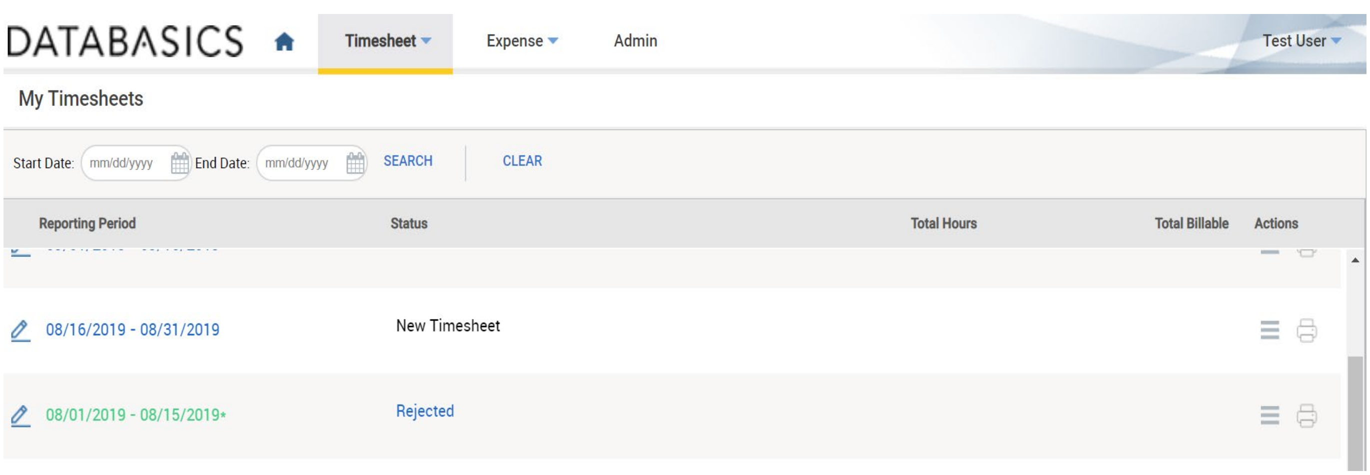


Figure 22: My Timesheets Screen Showing Rejected Timesheet

3. Your timesheet will then display. Notice that there will be a red **X** icon next to any records in your timesheet that were rejected. You can view your timesheet approver's notes by clicking on this red **X** icon or create a **Timesheet Rejection Report** by click on icon (see Figure 23).

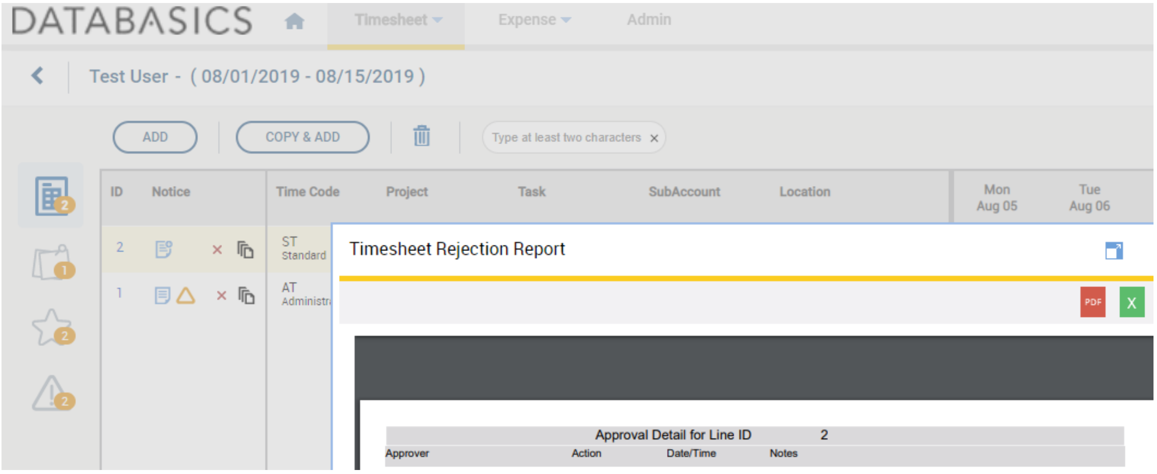


Figure 23: Notes for Rejected Timesheet

4. After reviewing the notes from your timesheet approver, make the appropriate corrections to your timesheet. When finished, click on icon save, validate your timesheet (see **Closing Out Your Timesheet for a Pay Period**) and **Submit**.

5. After confirming this is correct, you will be brought back to the ***My Timesheets*** screen. Notice that the status for your current timesheet has changed from "Rejected" to "**In Approval Process**" to denote you have submitted your timesheet for approval (see Figure 24).

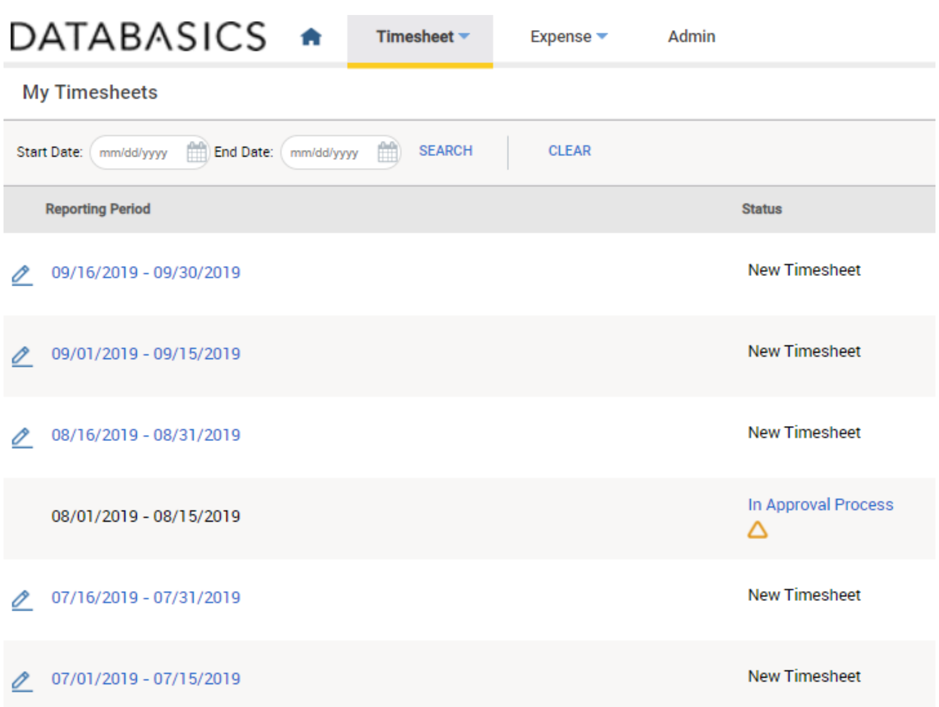


Figure 24: My Timesheets Screen Showing Rejected Timesheet Submitted for Approval

Print/Preview

DATABASICS Timesheets may be printed in three standard print formats. View these reports by accessing the **Print/Preview** menu (see Figure 25). The Print/Preview menu is located on the following screens:

- My Timesheet List
- My Time Approval
- Within the Timesheet itself.

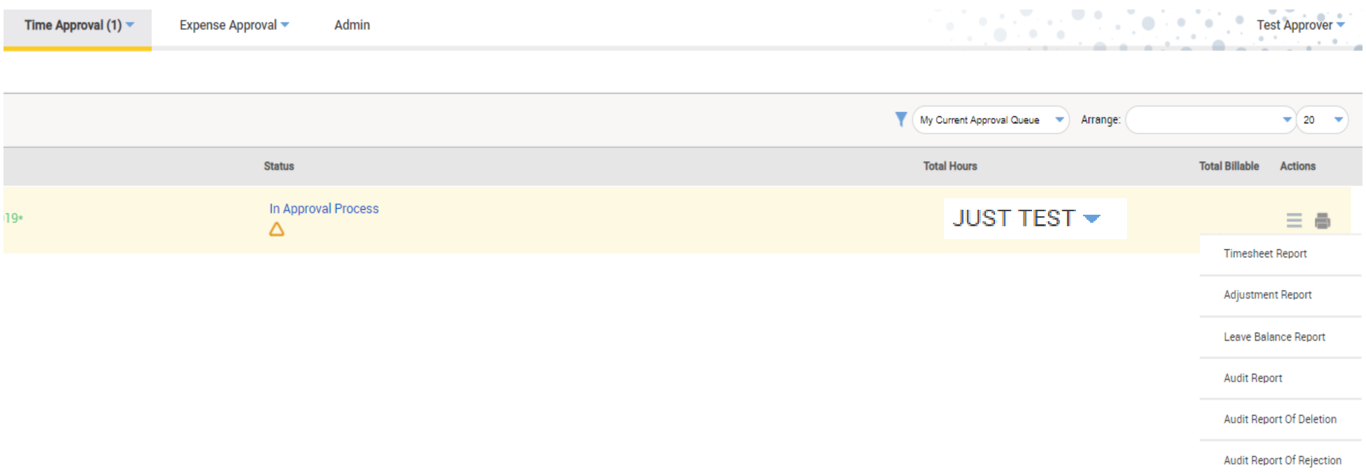


Figure 25: My Timesheets Screen Showing Print/Preview Option

Standard Timesheet Print Formats

1. **Timesheet Report**
   a. Displays timesheet information for selected reporting period.
   b. Breaks down Total Timesheet Hours, Total Billable Hours, and Indirect Hours.
   c. Summarizes hours by Pay Code.

2. **Adjustment Report**
   a. Tracks changes to timesheet as adjustments.

3. **Timesheet Audit Report**
   a. Shows all changes made to the timesheet.
   b. Each change is recorded with a date/time stamp along with the user who made the change.
   c. Corrections/modification will also appear on this report.

Leave Management (Time Off – Personal Time)

You may review your Personal Time balance, Personal Time taken in a single location within your timesheet. This includes your starting balance, accrued hours, hours taken and ending balance for the period.

To view your leave balance:

1. You may click on **Time Off** icon on the Home Shortcuts page (see Figure 26).

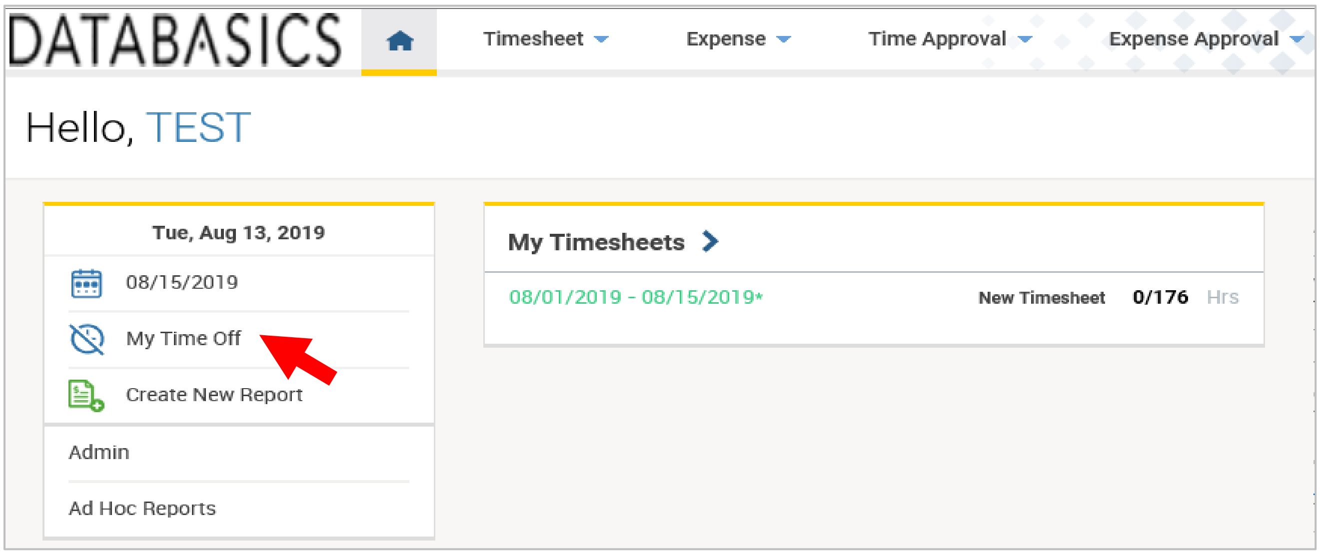


Figure 26: Time Off icon on the Home Shortcuts page

2. It will show Starting Balance for the Period, Accrued Hours, Hours Taken, and Ending Balance for the period (see Figure 27).

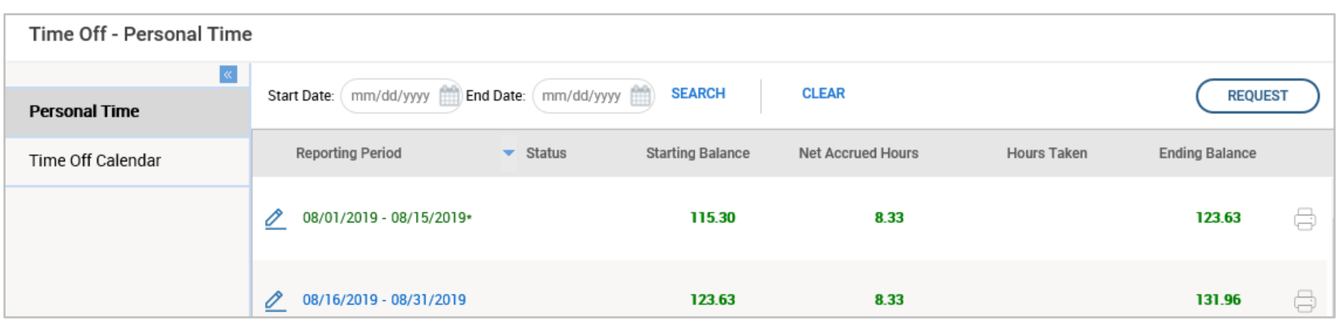


Figure 27: Available Leave Balance per pay period

3. To see your **leave balance detail**, you may click on any of the balances on each reporting period (See Figure 28).

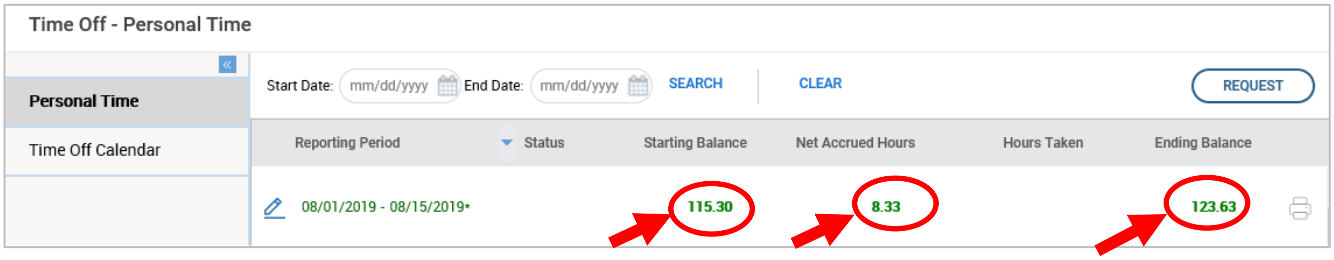


Figure 28. Running My Leave Balance Report

It will create your **Leave Balance Report** detail for **each reporting period** (See Figure 29).

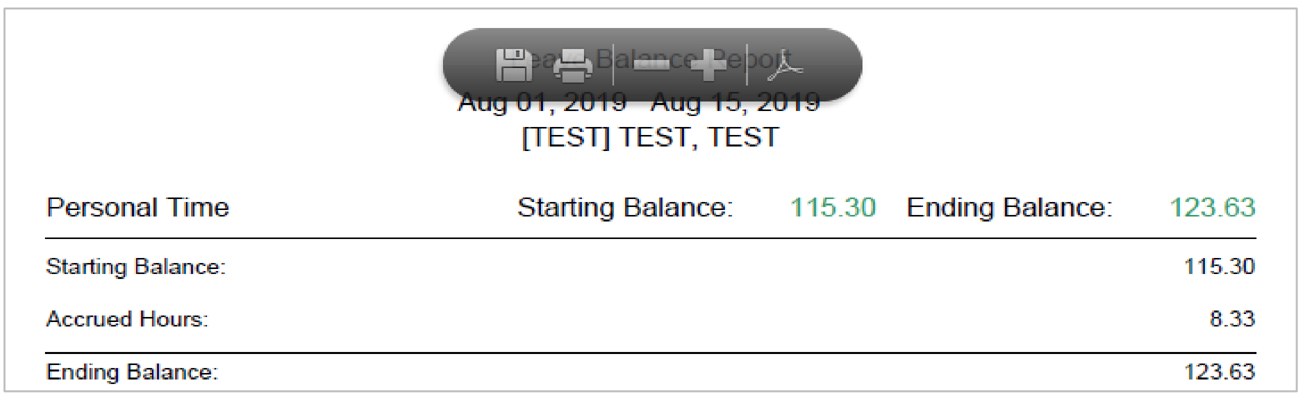


Figure 29. My Leave Balance Report

4. You may also view your **Leave Balance Report**:

   A. By clicking on **View Leave Balance** within your timesheet (see figure 30).

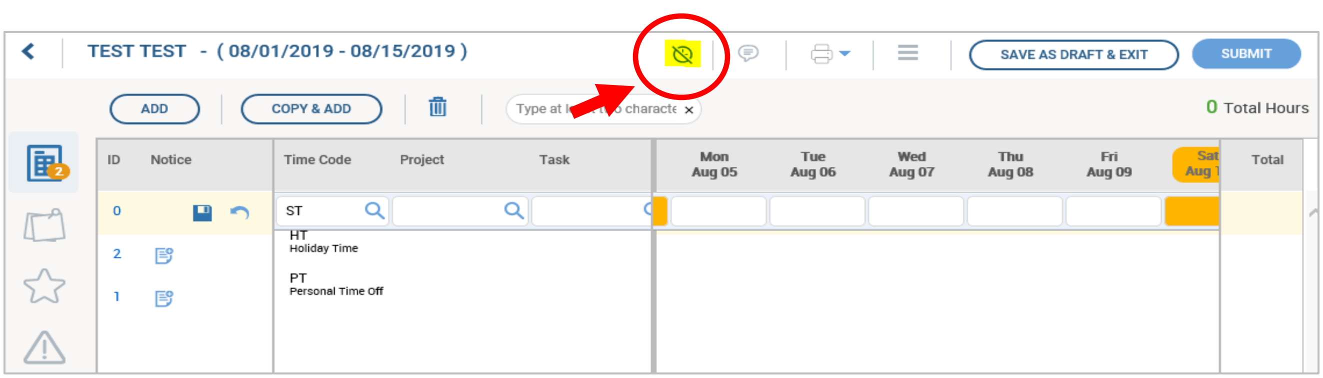


Figure 30. View Leave Balance within your timesheet

B. By accessing the **Print/Preview** drop down menu (see Figure 31) and select **Leave Balance Report**. The Print/Preview menu is located on the following screens:

- My Timesheets List.
- Within the Timesheet itself.
- My Time Off - Personal Time page.

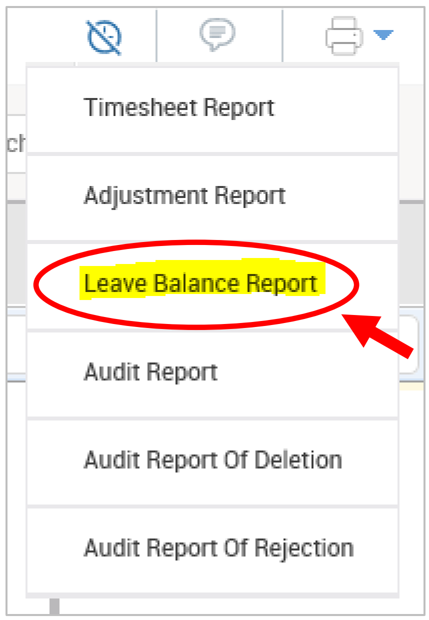


Figure 31.Print/Preview options for My Leave Balance Report

5. You may also view your Leave Balance Report by accessing Jasper Reporting in DATABASICS Time and Expense by selecting **Ad Hoc Reports** in **Home Menu** and run **Accrued Leave Balance Report (Excel)** (Please refer to DATABASICS Reporting).

6. To view your Approval Team's Leave Balance, you may access Jasper Reporting in DATABASICS Time and Expense by selecting **Ad Hoc Reports** in **Home Menu** and run **Accrued Leave Balance Report (Excel)** and enter **the Input Control** by selecting **My Team** to access your Team's Leave Balance Report (Please refer to DATABASICS Reporting).

DATABASICS Reporting

To access the Jasper Reporting in DATABASICS Time and Expense, select **Ad Hoc Reports** in **Home Menu (Please ensure the browser's pop-up blocker is disabled for DATABASICS)**.

Running a Report:

1. Click the **View** tab on the Home Page to reveal a drop down menu (see Figure 32).

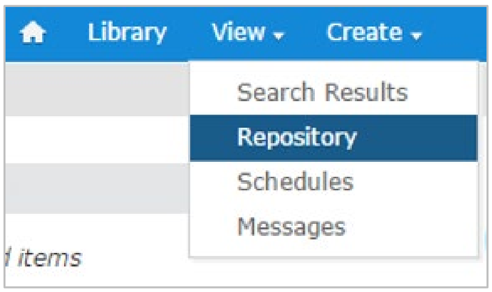


Figure 32. Repository

2. Click **Repository**
3. Expand **CALIBRE Systems, Inc**. folder
4. Expand **Reports** folder
5. Click on
   a. **CALIBRE User Reports** (see Figure 33).

Figure 33. CALIBRE User Reports

   b. **CALIBRE Approver** (see Figure 34) : Available only for **Approvers and Directors and above**

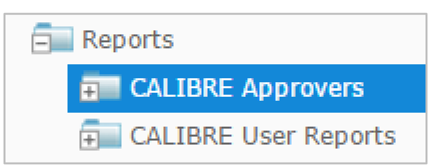


Figure 34. CALIBRE Approver

6. Click the **Name** of the report that you would like to run (see Figure 35).

Figure 35. CALIBRE User Reports

7. Once you selected one of the report you would like to run, it will be displayed the options for the **Input Controls** and you may enter the **Parameter/Input Controls**. You **must** apply **input values** before the report can be displayed. After you run your report and if you would like to modify your report click on icon **Input Controls** to modify your **Parameter/Input Controls** (see Figure 36 and Figure 37).
    a. For **Project hours,**
        i. You can select:
            a. iR-Project Summary Report or
            b. iR-Project Charge Detail Report: to see project hours detail day by day.

        ii. Select the options in the drop down menu for "**Query option with Project**" (see Figure 36).

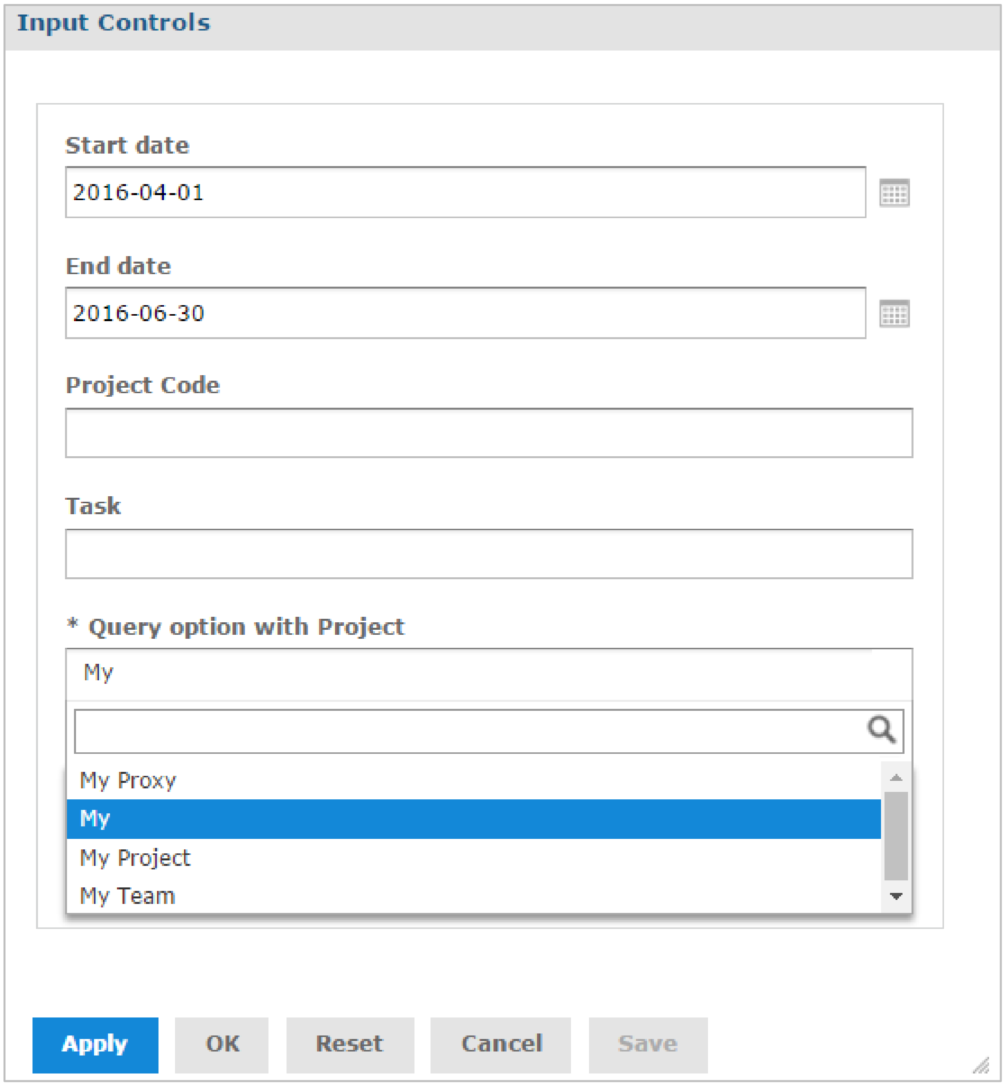


Figure 36. Input Controls

b. For **Accrued Leave Balance**:

   i. For your Leave Balance Report or your Team Leave Balance Report, you may select **Accrued Leave Balance Report (Excel)** and you may select the options in the drop down menu for the report option (see Figure 37).

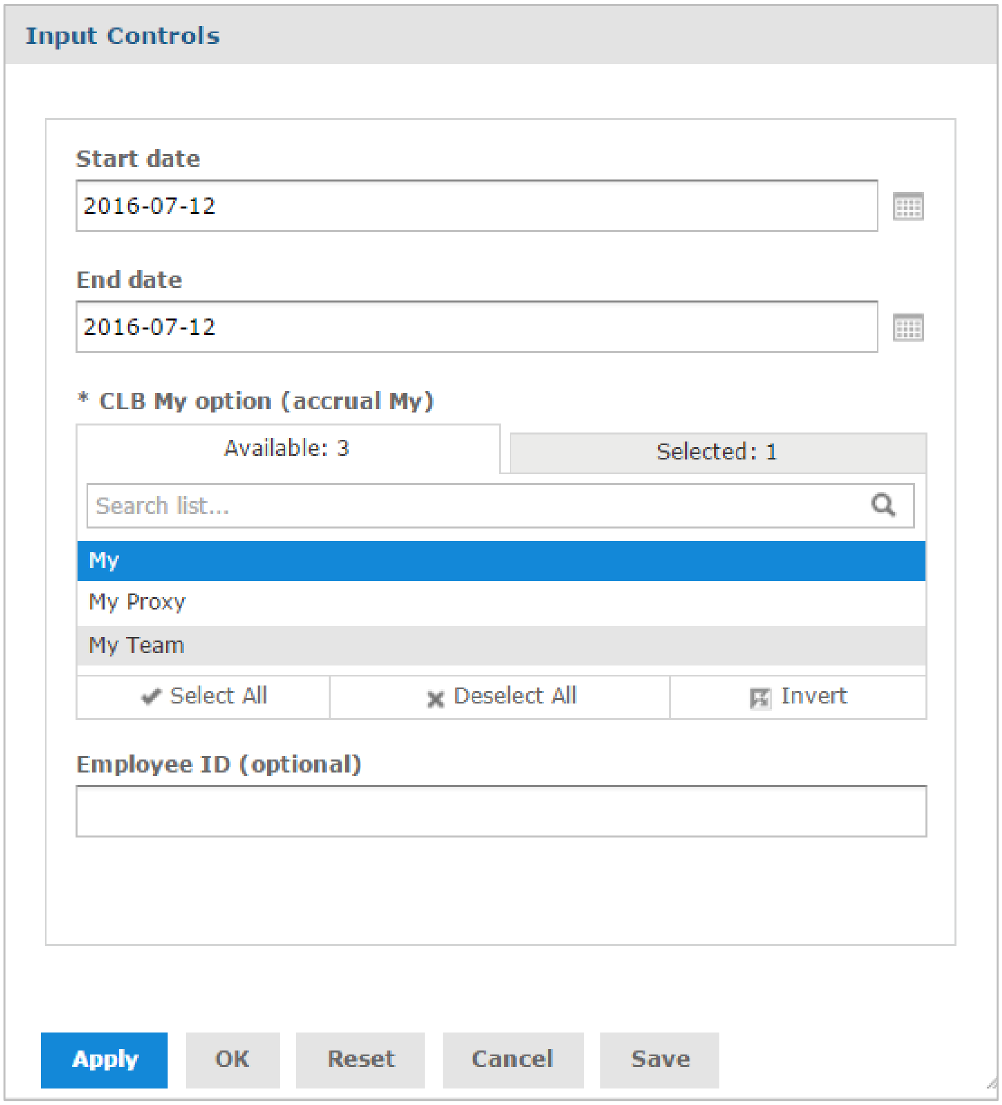


Figure 37. Time Off-Personal Time Input Controls

ii. For Directors and above, you may also select **Accrued Leave Balance Report (Excel Dir/Div)** (see Figure 38).

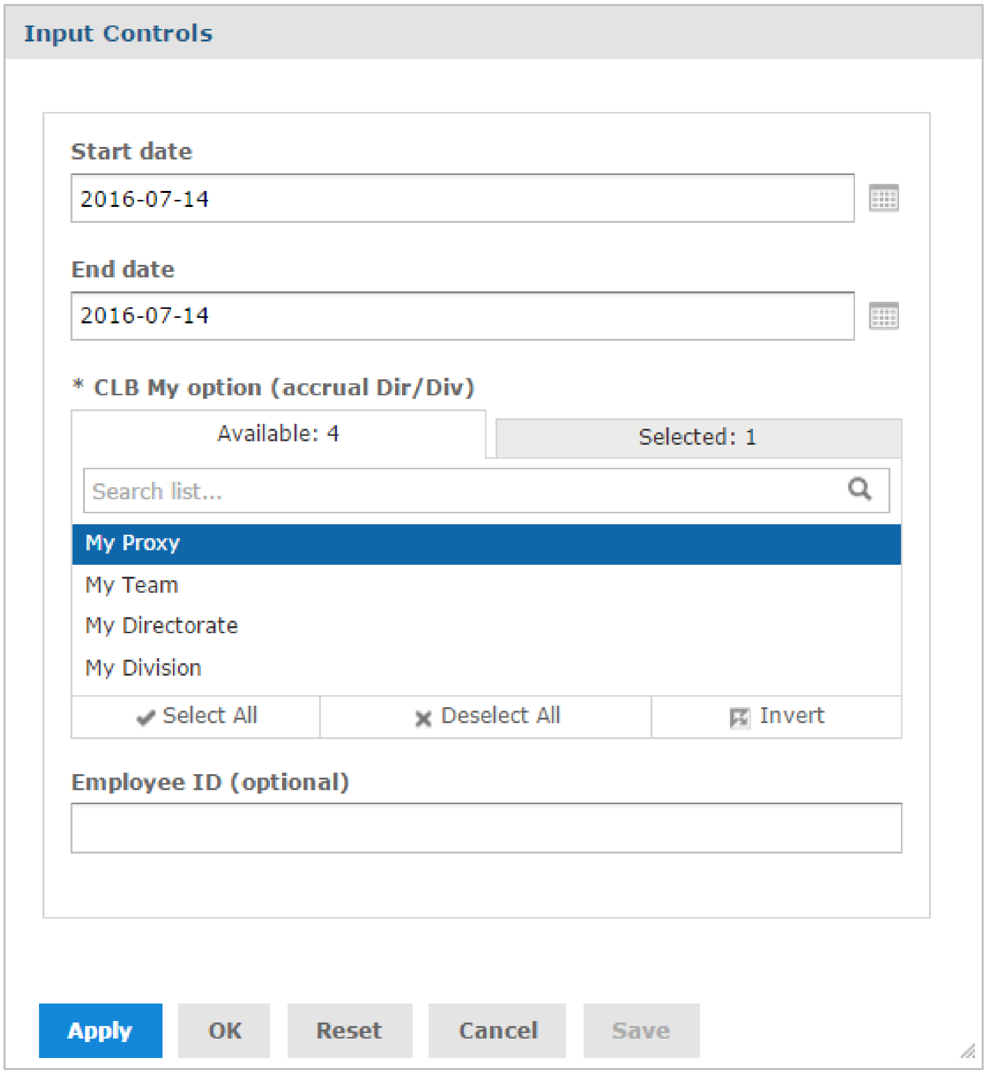


Figure 38. Input Controls

8. Once the **Parameter/Input Controls** information is completed, you may click "**Ok**".
9. The chosen report will be displayed.
10. You may click on icon to export your report by select one of the available formats.

Timesheet Favorites

Favorites allow you to save frequently used Projects/Tasks combinations without having to re-key the same codes into the timesheet each reporting period. Once saved, you can copy these lines into a timesheet from your favorites. To view your list of favorites, click the **Favorites** tab from the timesheet entry screen (see Figure 39).

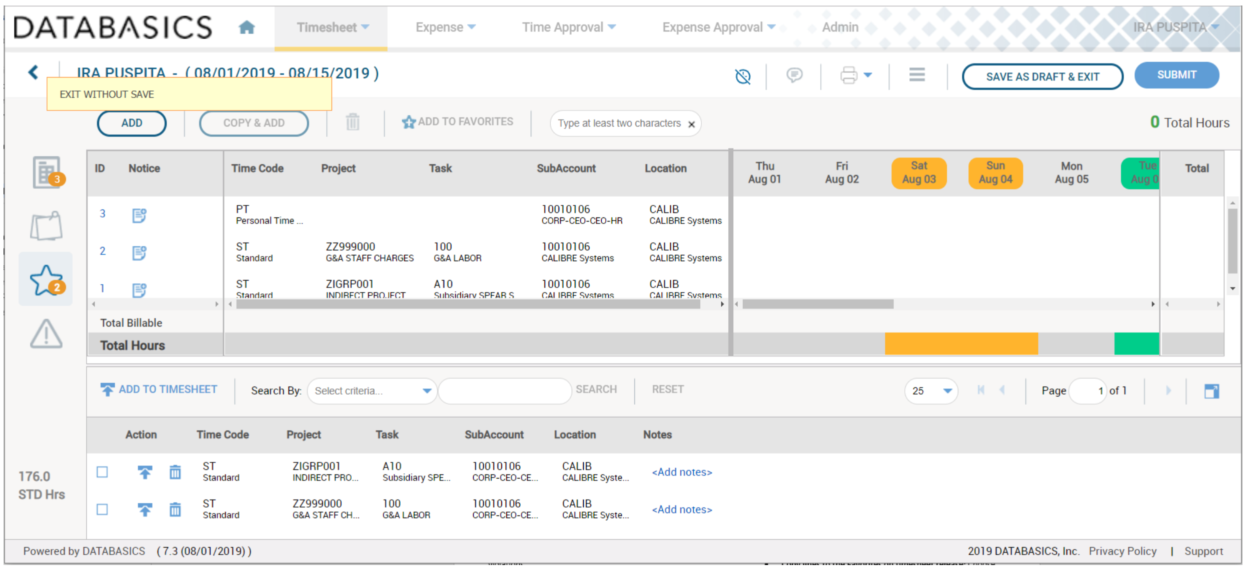


Figure 39. Timesheet Favorites

1. **Adding Lines to Your Favorites –** To manually add individual lines from your timesheet to your favorites.

   - To save a WBS/OBS code, click the Favorites tab.
   - Select the line on the timesheet and click the **Add to Favorites** button . The lines will appear below.

2. **Searching your Favorites –** You can search your favorites list by using the search field.

   - Select which field you would like to search against. The available fields are determined during configuration. You can only search against the fields that are enabled on the timesheet.
   - Click the **Search** button to search your Favorites.

3. **Adding Lines From Favorites –** To manually add individual lines to your timesheet from your favorites:

   - To copy a WBS/OBS line from the template onto the timesheet, click on the Favorites tab.

- Click the **Add to Timesheet** icon to add the line to the timesheet.

4. **Deleting Lines from Your Favorites –** To remove a line from your favorites:

- Click the icon to remove the line from your favorites.

5. **Auto-Populating Your Timesheet**

You can also add all of the lines on your timesheet to your favorites upon submission of the report. During the submission process, select "Set current lines with Hours > 0 to Auto-fill any new timesheets." This will save all the lines *with hours charged to them* to your Favorites list. This will also auto-populate the next new timesheet you open with the lines the same lines.

Notes: Only timesheet lines that have both a WBS/OBS structure and hours charged will be saved to your Favorites and be used to **auto-populate future timesheets**. Lines with no hours charged will not be saved or used to auto-populate a timesheet.

Auto-fill only works when the status of the timesheet you are opening is "New." It will not auto-populate a timesheet that has been previously worked on.

DATABASICS Time Preferences

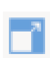
You can set your Time Preferences by click on the drop down arrow next to your name on right top side and select **My Preferences.** You will need to log out and log back in to see the changes.

User Preferences

- **Time code**: Select the default Pay code to be used when adding a new line.
- **Auto scroll to today's date**: If "Yes" is selected, the application will scroll to today's date when the timesheet is opened, a new line is created or a line is being modified.
- **Auto populate lines from the Favorites for new timesheets**: If "Yes" is selected, timesheet lines that are saved in your favorites will be pre-filled when you open a new timesheet.
- **Copy lines to Favorites on timesheet release**: If "Yes" is selected, the lines on the timesheet you are submitting will be saved to your favorites.
- **Timesheet WBS/OBS Width (10-70%)**: Select the percentage of the screen to be devoted to the WBS/OBS portion of the timesheet.
- **My Day Starts at:** The time you start your work day.
- **My Day Ends at:** The time your work day ends.

- **Display Time In and Out in AM/PM:** If "Yes" is selected, you will see time in AM/PM format vs military time.
- **Enable SubAccount:** Check "Yes" to show SubAccount.
- **Enable location:** Check "Yes" to show location.

DATABASICS Time Icon Legend

Icon	Name	Description
	**Add**	Add Entry
	**Add to Favorites**	Add entry to Favorites template
	**Add to Timesheet**	Add entry to timesheet from Favorites template
	**Approve / Reject**	Approve and Reject Actions
	**Attachment**	Attach document to the timesheet
	**Audit Row History**	Display row history modification.
	**Cancel/Undo**	Cancel/Undo entry edit
	**Settings**	Click to go to Setting menu
	**Delete**	Delete Entry
	**Edit**	Make an edit to a previous entry
	**Expand View**	Click on the icon to expand the viewing area.
	**Filter**	Filter timesheets
	**Future Timesheet**	Future Timesheet with Time Leave Request
	**Help**	Click on the icon to bring up help related to the screen the user is viewing. This function is maintained by individual companies.

	Message Notification	Click on the icon to add a notification.
	Menu of Options	Click to see a menu of options applicable to the selected screen
	Note	Add a note
	Note Added	Icon indicates there is a note entered
	Posted	Extracted and Posted
	Print	Print and Preview
	Refresh	Refresh
	Save	Save Entry
	Search Icon	Click on the icon to bring up the search window.
	Select an Option	Select a WBS option
	Validation	Click to see the associated validations
	Validation Failed	The timesheet failed validation. The timesheet cannot be submitted until these issues are corrected.
	Validation Warning	There are potential errors on the timesheet. The user can still submit the timesheet, but should investigate the warning first.
	Current Timesheet	Current timesheet icon on mobile app
	Take a photo	Take photo of the document from the mobile app to attach it to a timesheet
	Add Image from Album	Browse to the photo album of the mobile device to attach a document
	Add Image from the Repository	Browse to Databasics image repository to attach a document