

Job Timesheet Import Overview

As of SedonaOffice version 5.6.140, a new custom import feature was added to the Job Timesheet entry screen. A specifically formatted “csv” file can be used to import Installer hours/dollars for work performed on Jobs. This import functionality was a custom design developed for one specific SedonaOffice customer.

This document is designed for use by SedonaOffice customers to explain the new timesheet import functionality; how the feature was designed to work and how to use this feature.

Important Note: Since this new option was a custom piece of development, this feature is not covered by regular SedonaOffice Support. Inquiry beyond the contents of this document is billable at regular support hourly rates [a minimum of one hour].

This document will cover the following topics:

- Installer Timesheet .csv file import layout and definitions
- Installer Hourly Rate Setup
- Importing a properly formatted Installer Timesheet .csv file
- Examples of the results of an imported Installer Timesheet batch

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Installer Timesheet File Layout & Definitions

This topic section will provide a visual sample of the required layout of the Installer Timesheet file and provide definitions of the information expected in each column of the file.

The Installer Timesheet file consists of nine columns of information. The data in the import file must be in the column order that is expected by the import process. Some columns must be populated for validation purposes and others are optional. Once your data is formatted as needed by the SedonaOffice Timesheet import process, the file must be saved in the .csv [comma separated values] format.

File Layout

In the example provided below, the first row displayed is a header line to show what value is expected for each column of the data file. Prior to saving your data file, make certain to remove the header row. A file containing a header row will fail.

The column names in the header row that are highlighted in green indicate that data your company provides is validated against your SedonaOffice database. The data in the columns highlighted in yellow are not a validated field but are required to post the timesheet batch.

For columns where data is optional, you must still include the column within the file in the correct column order even though the data is left blank.

EE#	Installer	WorkDate	Job	Description	JobTask	LaborTask	RegUnits	OTUnits
601	Ogden Ocean	8/13/2012	135	Prewire Intrusion and CCTV	Prewire	PW	4	0
605	Orlando Smith	8/13/2012	135	Prewire Intrusion and CCTV	Prewire	PW	4	0
610	Oscar Martin	8/13/2012	129	Install Devices	Install	IN	8	0

Column Definitions

Below are the general definitions of each of the nine columns within the Installer Timesheet file. On the following page are more details related to fields that are validated by the import process.

<u>Column Name</u>	<u>Column Position</u>	<u>Description</u>	<u>Data Type</u>	<u>Required</u>	<u>Validated</u>
EE#	1	Typically the employee number or payroll record number.	Alpha-Numeric; Unlimited number of characters.	Y	N
Installer	2	Installer First Name followed by one space then the Installer Last name as setup in the Employee record for the Installer.	Alpha-Numeric; 30 characters first name, 30 characters last name plus one character for the space between the first and last name; total of 61 characters allowed. This field is case sensitive.	Y	Y
WorkDate	3	Date on which the labor was performed.	Date: format MM/DD/YYYY.	Y	N
Job	4	Valid open Job Number.	Alpha-Numeric; up to 25 characters.	Y	Y
Description	5	Free from text field for entering a comment for the timesheet entry.	Alpha-Numeric; up to 255 characters.	N	N
JobTask	6	Valid Task on the Job Task list for the Job indicated in column 4.	Alpha-Numeric; up to 25 characters.	Y	N
LaborTask	7	A valid Labor Task from the SedonaSetup Labor Task setup table. If an invalid entry is entered, the Labor Task field of the timesheet entry will be blank when viewing on a Job record.	Alpha-Numeric; up to 25 characters.	N	N
RegUnits	8	The amount of regular labor units worked on the Job by the Installer. There must be a value in either the RegUnits or OTUnits column.	Numeric; up to eleven digits to the left of the decimal and up to four digits to the right of the decimal.	Y*	N
OTUnits	9	The number of overtime labor units worked on the Job by the Installer. There must be a value in either the RegUnits or OTUnits column.	Numeric; up to eleven digits to the left of the decimal and up to four digits to the right of the decimal.	Y*	N

Validated Column Information

There are two columns within the Installer Timesheet file which are validated to ensure database integrity before the application allows the User to post the installer timesheet batch. This section will describe how each of these data elements is validated against the company's SedonaOffice database.

Installer

The Name of the Installer must be formatted in the same manner that appears in the Name field in the drop-down list in the Installer setup table within SedonaSetup. The name that appears in the Installer Name drop-down list is a combination of the First Name and Last Name fields for that Installer's setup in the Employee setup table within SedonaSetup. There must be one space between the First Name and Last Name.

EE#	Installer	WorkDate	Job	Description	JobTask	LaborTask	RegUnits	OTUnits
601	Ogden Ocean	8/13/2012	135	Prewire Intrusion and CCTV	Prewire	PW	4	0
605	Orlando Smith	8/13/2012	135	Prewire Intrusion and CCTV	Prewire	PW	4	0
610	Oscar Martin	8/13/2012	129	Install Devices	Install	IN	8	0

Installer Edit

Name: Orlando Smith (dropdown menu open showing list)

Address...: 547 Washington Chagrin Falls, OH 44022

Service: Ogden Ocean (dropdown menu open showing list)

Service Con: Oliver Jones (dropdown menu open showing list)

Warehouse: Orlando Smith (dropdown menu open showing list)

Text Message Address: []

Expertise Level: 5

[New] [Delete] [Apply]

Employee Edit

Employee Code: Orlando.Smith [Inactive]

General Information | Payroll | Commission Setup | Documents

User Code: [] First Name: Orlando

Type: IN Last Name: Smith

Assigned To: Installation Middle Initial: []

Supervisor: [] Date of Hire: []

Termination: []

Job Approval Group: []

Created: Administrator 4/10/2012
Updated: carolyn 8/21/2012

[Apply] [New] [Delete]

Job

The Job [Number] must be a valid Job number within the database. Job Change Order numbers are not acceptable values.

Important Note: This custom import process does not validate the rules on individual Job Type setups that allow or not allow posting costs to closed jobs. It is the responsibility of the User of this custom import process to review and ensure valid entries are being imported and posted to Jobs.

EE#	Installer	WorkDate	Job	Description	JobTask	LaborTask	RegUnits	OTUnits
601	Ogden Ocean	8/13/2012	135	Prewire Intrusion and CCTV	Prewire	PW	4	0
605	Orlando Smith	8/13/2012	135	Prewire Intrusion and CCTV	Prewire	PW	4	0
610	Oscar Martin	8/13/2012	129	Install Devices	Install	IN	8	0

The screenshot shows the 'Open Job List (Sedona Security)' window. At the top, there are filters for '<All Job Statuses>', '<All Job Types>', '<All Companies>', and '<All Installers>'. Below the filters is a 'Select Job Number' input field. The main area contains a table with columns: Job #, Customer #, Site Name, Address, City, and Create Date. A red circle highlights the 'Job #' column, which contains values from 230 to 323. The 'Create Date' column shows dates from 3/25 to 3/1.

Job #	Customer #	Site Name	Address	City	Create Date
230	9127	Brice, Jonathan	471 Main	Riverside	3/25/12
289	9194	David Whitman	1025 Lance Road	Lake Arrow...	3/4/12
291	9999	Carolyn Johnson	2672 Hans Lane	Riverside	5/1/12
293	8654	Marianne Matthews	2322 Ford Rd	Plymouth	7/1/12
294	9064	Andrew Weber	100 Main	Plymouth	8/1/12
295	9207	NorthStar Alarm	100 Main	Lafayette	8/1/12
296	9208	Spade, Samantha	2334 Hans Lane	Irvine	8/1/12
297	9071	Sarah Watson	199 Collins	Newport Be...	8/1/12
302	9209	Bigby, Colleen	105 Main	Riverside	9/2/12
303	9210	Smith, Julie	321 Main Street	Baton Rouge	9/2/12
304	9213	Smith Brothers Lighting	3255 W 35th	Plymouth	10/1/12
307	9215	Broward Service Center	2800 NW 17th Terrace	Fort Lauder...	11/18/12
308	9037	Marin, Joe	4582 Green	Pearce	12/23/12
309	2167	Lands, James	3264 Hans Lane	Holtville	1/12/2013
310	10035	Antinarelli, Gordon	20 Washington Avenue	Aliso Viejo	1/15/2013
311	10035	Antinarelli, Gordon	20 Washington Avenue	Aliso Viejo	1/15/2013
312	10007	Advanced Medical	138 River Road	Beverly Hills	1/17/2013
313	9219	Goodrich, Laurie	40 North Street	Chagrin Falls	1/25/2013
314	9220	CJM Security	417 Joy Road	Plymouth	1/30/2013
315	9222	Kwazi Motto	3223 Main	Plymouth	2/3/2013
316	9999	Carolyn Johnson	2672 Hans Lane	Riverside	2/1/2013
317	9223	Burns, Lauren	1234 Main	Runge	2/1/2013
318	9999	Carolyn Johnson	2672 Hans Lane	Riverside	2/1/2013
319	9999	Carolyn Johnson	2672 Hans Lane	Riverside	2/1/2013
321	9225	Marlowe, Rita	3322 Mission Hills Road	Santa Clara	2/1/2013
322	9040	Grimes, Leann	65236 Scribner	Whittier	3/1/2013
323	9228	Miller, Anne	12345 Main	Plymouth	3/1/2013
		Marlowe, Rita	512 Ash...	Santa Clara	3/1/2013
		Mary		Plymouth	

Installer Hourly Rates/Setup

Depending on each company's internal costing methods, when importing and posting an Installer Timesheet file, either labor units only or labor units and labor dollars will be applied to the Jobs. The values used for the Installer rates are setup and maintained within the Installer setup table of SedonaSetup. If no rates are setup on the Installer setup record, then only labor units will be applied to Jobs.

The screenshot displays the 'Installer Edit' window. At the top, there is a 'Begin Day From' button. The 'Name' field contains 'Orlando Smith' and the 'Address...' field contains '547 Washington, Chagrin Falls, OH 44022'. Below these are three radio buttons: 'Service Tech', 'Installer', and 'Bgth', with 'Bgth' selected. A tabbed interface shows 'Service' and 'Routes' tabs, with 'Installation' selected under 'Service'. Under the 'Installation' tab, there are four input fields: 'Instal Company' (OH), 'Regular Pay Rate' (20.00), 'Overtime Pay Rate' (30.00), and 'Holiday Pay Rate' (40.00). At the bottom right, there are three buttons: 'New', 'Delete', and 'Apply'.

Regular/Overtime Labor

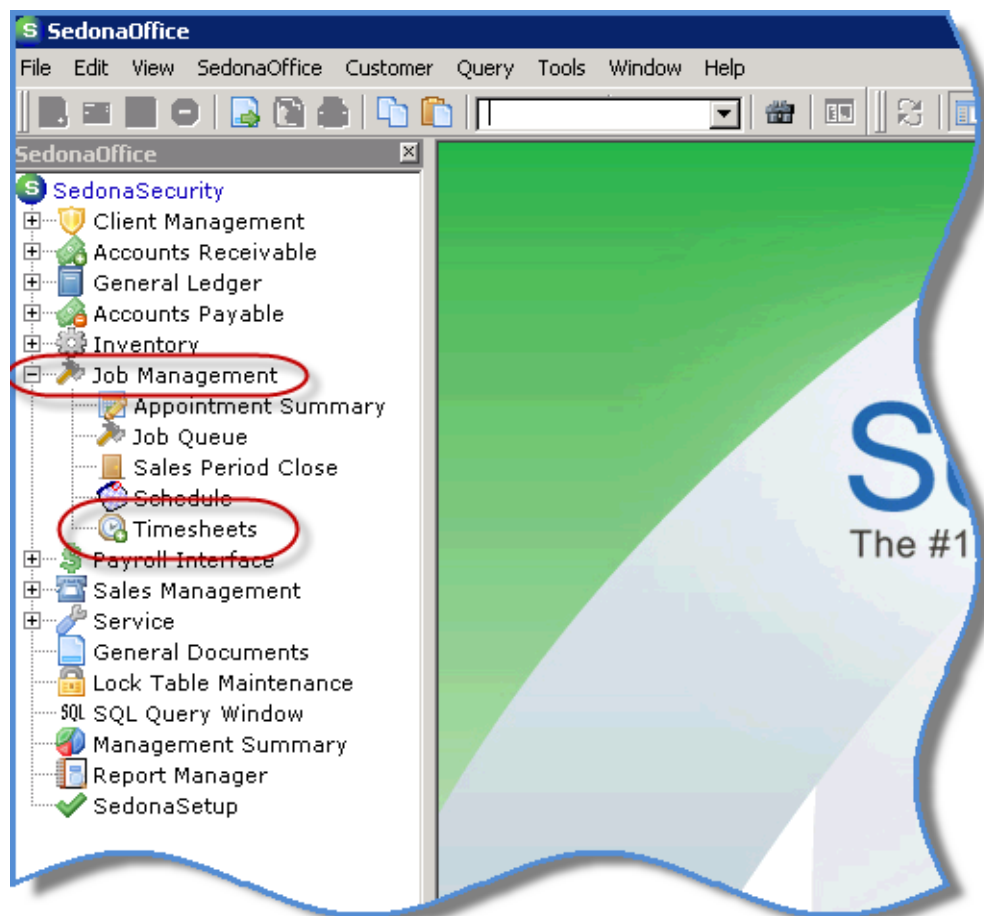
If a row in the Installer Timesheet file contains values in both the RegUnits and OTUnits, when importing the file, two timesheet records will be created; one record for the RegUnits and one record for the OTUnits. If hourly rates exist on the Installer setup record in SedonaSetup, then the import file RegUnits will be multiplied by the Regular Pay Rate and the OTUnits will be multiplied by the Overtime Pay Rate that exists in the Installer setup.

If a row in the Installer Timesheet file contains a value in RegUnits or OTUnits, then only one timesheet record will be created; labor dollars will be calculated with the corresponding pay rate.

Importing an Installer Timesheet File

The below process describes and illustrates how to import the correctly formatted Installer Timesheet file.

1. Navigate to the main application menu tree and expand the menu of the Job Management module.
2. From the Job Management menu, double-click on the *Timesheets* menu option.



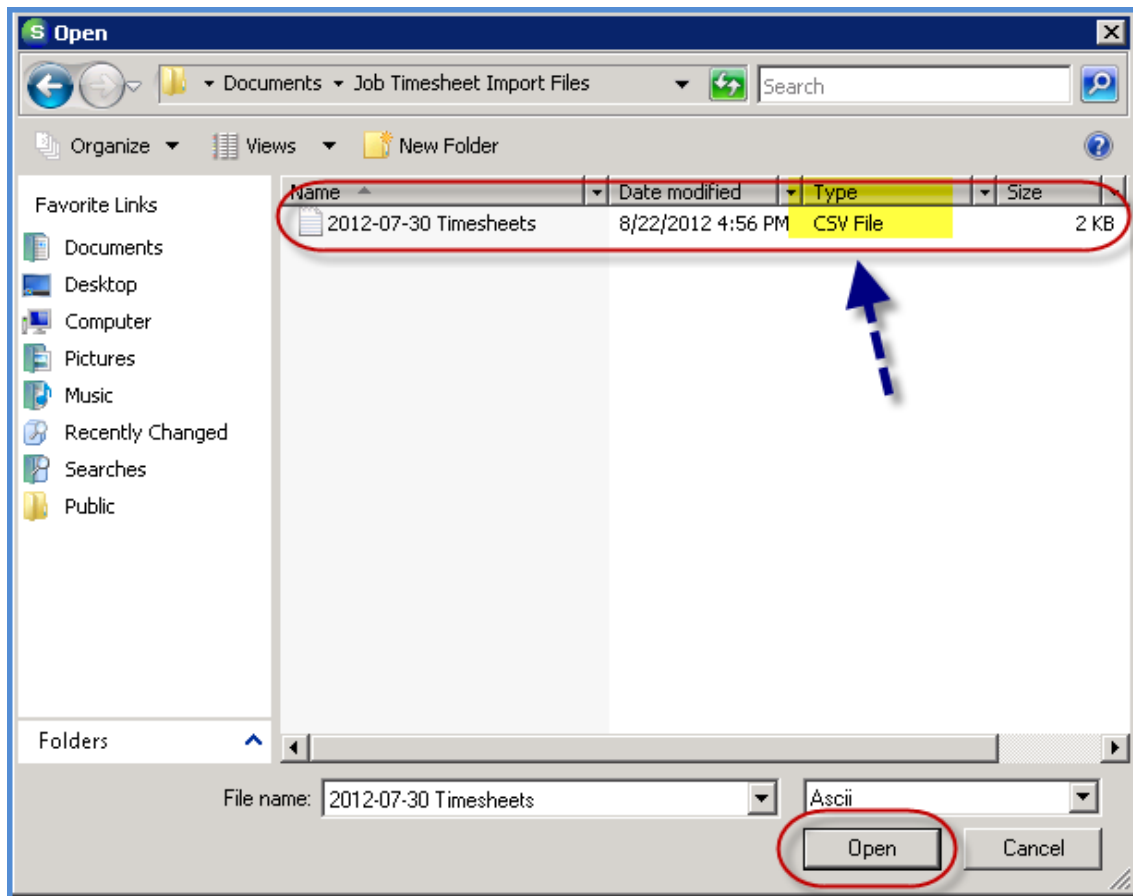
Importing an Installer Timesheet File (continued)

3. The Timesheet Entry form will be displayed. At the top of the form in the description field, enter a description for the batch. Once the batch is saved/posted, you are able to retrieve previous batches, so the naming convention of the batch should be consistent so that it is easily sortable. For example, for a multi-branch company that will be importing separate batches for each branch, the batch description may look like this: OH 2012-07-30. The batch description may contain up to 50 characters.
4. Once the *Description* has been entered, click on the *Import* button located at the lower left of the form.

The screenshot shows the 'Timesheet Entry' window. At the top, the 'Description' field is highlighted in yellow and contains the text 'OH 2012-07-30'. Below this is a table with the following columns: Work Date, Installer, Job, Job Task, Description, Labor Task, Units, Pay Rate, and Amount. The table is currently empty. Below the table are several input fields: Date, Job, Installer, Job Task, and Description on the left; and Labor Task, Units, Pay Rate, and Amount on the right. At the bottom of the form, there are buttons for 'Add', 'New', and 'Delete'. At the very bottom, there are buttons for 'Get Previous Timesheet', 'Import', 'Save', and 'Close'. The 'Import' button is circled in red, and a blue dashed arrow points to it from the right side of the form.

Importing an Installer Timesheet File (continued)

5. The Windows File Explorer will be displayed. Locate the file that will be imported, then either click once on the file, then click on the *Open* button at the lower right, or double-click on the file to import.



Importing an Installer Timesheet File (continued)

- Data from the import file will fill into the grid area of the Timesheet Entry form. Review the imported data carefully, check for any problems.

In the example below, one *Installer* is displaying a Pay Rate and Amount of zero. This is because there are no *Pay Rates* setup for this Installer record in SedonaSetup. At this point, you would press the *Close* button, make the corrections on the Installer setup in SedonaSetup, and then repeat the Import process again.

The screenshot shows the 'Timesheet Entry' window with a table of imported data. The table has columns for Work Date, Installer, Job, Job Task, Description, Labor Task, Units, Pay Rate, and Amount. One row for Oscar Martin (Job 135) shows a Pay Rate of 0.00 and an Amount of 0.00. Below the table are input fields for Date, Job, Installer, Job Task, Description, Labor Task, Units, Pay Rate, and Amount. At the bottom right, the 'Close' button is circled in red, with a blue arrow pointing to it.

Work Date	Installer	Job	Job Task	Description	Labor Task	Units	Pay Rate	Amount
7/30/2012	Orlando Smith	129	Prewire	Prewire Fire	PW	8.5	10.00	85.00
7/30/2012	Orson Goodman	129	Prewire	Prewire Fire	PW	8	15.00	120.00
7/30/2012	Oscar Martin	129	Prewire	Prewire Fire	PW	4	10.00	40.00
7/30/2012	Oscar Martin	135	Prewire	Prewire Fire	PW	4	10.00	40.00
7/30/2012	Oscar Martin	135	Prewire	Prewire Fire	PW	1.5	15.00	22.50
7/30/2012	Osman Wilson	135	Prewire	Prewire Fire	PW	4	0.00	0.00
7/30/2012	Osman Wilson	135	Prewire	Prewire Fire	PW	1.5	0.00	0.00
7/30/2012	Mark Taylor	139	Install	Prewire Fire	IN	4	18.00	72.00
7/30/2012	Mike McKenzie	141	Install	Prewire Fire	IN	4	15.00	60.00
7/30/2012	Mike Walker	141	Install	Prewire Fire	IN	4	30.00	120.00

Below is the Installer Timesheets after making the corrections to the Installer setup.

The screenshot shows the 'Timesheet Entry' window with the corrected data. The table now shows a Pay Rate of 10.00 and an Amount of 85.00 for the Oscar Martin (Job 135) row. Below the table are input fields for Date, Job, Installer, Job Task, Description, Labor Task, Units, Pay Rate, and Amount. At the bottom right, the 'Save' button is circled in red, with a blue arrow pointing to it.

Work Date	Installer	Job	Job Task	Description	Labor Task	Units	Pay Rate	Amount
7/30/2012	Orlando Smith	129	Prewire	Prewire Fire	PW	8.5	10.00	85.00
7/30/2012	Orson Goodman	129	Prewire	Prewire Fire	PW	8	15.00	120.00
7/30/2012	Oscar Martin	129	Prewire	Prewire Fire	PW	4	10.00	40.00
7/30/2012	Oscar Martin	135	Prewire	Prewire Fire	PW	4	10.00	40.00
7/30/2012	Oscar Martin	135	Prewire	Prewire Fire	PW	1.5	15.00	22.50
7/30/2012	Osman Wilson	135	Prewire	Prewire Fire	PW	4	15.00	60.00
7/30/2012	Osman Wilson	135	Prewire	Prewire Fire	PW	1.5	22.50	33.75
7/30/2012	Mark Taylor	139	Install	Prewire Fire	IN	4	18.00	72.00
7/30/2012	Marlin Larson	139	Install	Prewire Fire	IN	3	15.00	45.00
7/30/2012	Marshall Watson	139	Install	Prewire Fire	IN	3	20.00	60.00
7/30/2012	Mike McKenzie	139	Install	Prewire Fire	IN	4	10.00	40.00
7/30/2012	Mike Walker	139	Install	Prewire Fire	IN	4	20.00	80.00

Importing an Installer Timesheet File (continued)

7. If all the data passes the validation rules, the *Save* button will be enabled. If any of the data does not pass the validation rules, the *Save* button will be dimmed-out. Rows where any of the data does not pass the validate rules will be displayed with a red font color. The two fields that must pass validation are Installer and Job [number].

Once you are satisfied with the Timesheet records displayed, click the *Save* button.

The screenshot shows the 'Timesheet Entry' window. At the top, there is a 'Description' field containing '2012-07-30'. Below this is a table with the following columns: Work Date, Installer, Job, Job Task, Description, Labor Task, Units, Pay Rate, and Amount. The table contains 14 rows of data. Below the table is a form with fields for Date, Job, Installer, Job Task, Description, Labor Task, Units, Pay Rate, and Amount. At the bottom of the form are buttons for 'Add', 'New', 'Delete', 'Save', and 'Close'. The 'Save' button is circled in red, and a blue arrow points to it from the 'Add' button.

Work Date	Installer	Job	Job Task	Description	Labor Task	Units	Pay Rate	Amount
7/30/2012	Orlando Smith	129	Prewire	Prewire Fire	PW	8.5	10.00	85.00
7/30/2012	Orson Goodman	129	Prewire	Prewire Fire	PW	8	15.00	120.00
7/30/2012	Oscar Martin	129	Prewire	Prewire Fire	PW	4	10.00	40.00
7/30/2012	Oscar Martin	135	Prewire	Prewire Fire	PW	4	10.00	40.00
7/30/2012	Oscar Martin	135	Prewire	Prewire Fire	PW	1.5	15.00	22.50
7/30/2012	Osman Wilson	135	Prewire	Prewire Fire	PW	4	15.00	60.00
7/30/2012	Osman Wilson	135	Prewire	Prewire Fire	PW	1.5	22.50	33.75
7/30/2012	Mark Taylor	139	Install	Prewire Fire	IN	4	18.00	72.00
7/30/2012	Marlin Larson	139	Install	Prewire Fire	IN	3	15.00	45.00
7/30/2012	Marshall Watson	139	Install	Prewire Fire	IN	3	20.00	60.00
7/30/2012	Mike McKenzie	139	Install	Prewire Fire	IN	4	10.00	40.00
7/30/2012	Mike Walker	139	Install	Prewire Fire	IN	4	20.00	80.00

Viewing the Saved Installer Timesheets

Once a batch of imported Installer Timesheets has been saved, you may view the individual timesheets within the Job record.

The screenshot displays the 'Job - 129 (Chagrin Falls Memorial Hosp)' window. The interface includes a sidebar with navigation options: Job, Labor, Schedule, Appointments, Time Sheets, and Payroll Timesheet. The main area is divided into sections for Job details, Time Sheets, and input fields.

Job Details:

Job	Customer 13353	Site
Job Number: 129	Chagrin Falls Memorial Hosp	Chagrin Falls Memorial Hosp
Job Type: LC-Fire	71 Haynes Street	71 Haynes Street
Job Status: Prewire	Attn: Beth Chaty	Attn: Beth Chaty
System: 13353 Intrusion/Fire	Chagrin Falls, OH 44022	Chagrin Falls, OH 44022
Labor Units: 65 (62.0833 Used)	United States	United States

Time Sheets Table:

Work Date	Installer	Job Task	Description	Labor Task	Units	Pay Rate	Amount
7/30/2012	Orlando Smith	Prewire	Prewire Fire	PW	8.5	10.00	85.00
7/30/2012	Orson Goodman	Prewire	Prewire Fire	PW	8	15.00	120.00
7/30/2012	Oscar Martin	Prewire	Prewire Fire	PW	4	10.00	40.00

Input Fields:

Date: Labor Task:

Installer: Units:

Job Task: Pay Rate:

Description: Amount:

Buttons: Add, New, Delete