Time Sheet Guide
CTR Portal
Version date 07/12/2016
# Clinical and Translational Science Institute

## Contents

Introduction ................................................................................................................................. 3
Accessing Time Sheet ................................................................................................................ 4
Time Sheet Navigation .............................................................................................................. 5
  Time Sheet Overview ........................................................................................................... 5
  Quick Add Position ............................................................................................................. 6
Navigation Tips ...................................................................................................................... 8
  Keyboard Shortcuts .......................................................................................................... 8
Adding New Time Entries ....................................................................................................... 10
  Select Week (Step 1) ...................................................................................................... 10
  Quick Add (Step 2) ....................................................................................................... 11
  Review (Step 3) ............................................................................................................. 13
Managing Existing Time Entries ............................................................................................. 14
  Time Entry Views .......................................................................................................... 14
    By Project ................................................................................................................... 14
    By Activity .................................................................................................................. 18
    Itemized ...................................................................................................................... 21
  Search/Filter .................................................................................................................... 23
General Time .......................................................................................................................... 24
  General Time - Comments .............................................................................................. 24
  General Time – Additional Features .............................................................................. 25
Favorite Activities ................................................................................................................. 26
  Adding and Removing Favorites ..................................................................................... 26
Introduction

*What is the Time Sheet module?*

The *Time Sheet* module allows for the tracking of hours and services in the CTR Portal. Time entries can be either logged on a per project basis, or as general time.

*How is the information from the Time Sheet module used?*

Hours and services entered in the Time Sheet module are used for invoicing and reporting.

*Who has access to the Time Sheet module?*

Domain staff tracking time for invoicing or reporting purposes can be configured to access the Time Sheet module. Contact ctsifin@umn.edu to configure access.

*When does the Time Sheet lock entries each month?*

The Time Sheet locks on the 11th each month at 11:59 p.m. for the previous month. For example, on July 12th no more time can be logged for the month of June.

*How can I run a report of time or services logged in the Time Sheet module?*

Time-Tracking Reporting is available in the Toolkit drop-down in the CTR Portal. Contact ctsifin@umn.edu to configure access.
Accessing Time Sheet

From any screen in the CTR Portal select Toolkit. Select the Time Sheet module in the drop-down. Contact ctsifin@umn.edu if this option is not available to you:
Time Sheet Navigation

Time Sheet Overview
The Time Sheet module is divided into different sections. A description of each section is provided below:

Quick Add
Add new activities to your time sheet, or quickly log new entries and associate comments. This section can be docked as a side bar, or hidden from view.

Select Week
Update the week you are currently viewing.

Change Views/Manage Favorites
Change the way the time entries are displayed: by project, by activity or itemized. Manage activities that have been made favorites.

Total Time
Track totals of all time entries (regular + exempt + general time) by day, and by week.

Search/Filter
Search or filter existing time entries. Project related activities added to your Time Sheet will appear below this section.

General Time
Add and manage non-project related activities.
Quick Add Position

The Quick Add section is adjustable to be **docked** or **hidden**. Your Time Sheet will remember this as your **default** view when you return.

Use the arrow buttons to update the Quick Add view:
**Inline**
The Quick Add section will remain fixed at the top of the page.

**Docked**
The Quick Add section will remain fixed in a pane on the left side of the page. You may freely navigate through your time sheet on the right pane.

**Hidden**
The Quick Add section will remain collapsed to the left side of the page, and the features of Quick Add will become hidden from view. You may freely navigate through your time sheet on the right pane.
Navigation Tips

To navigate quickly to project or general time entries use the **Down to Time Sheet** and **Down to General Time** buttons located near the top of the page. The page will navigate to the top of the appropriate section:

Keyboard Shortcuts

The time sheet can be navigated without a mouse. Some keystrokes may not work with every Internet browser. It is recommended that your browser is updated to the latest version. **General keyboard shortcuts include:**

<table>
<thead>
<tr>
<th>IF you want to...</th>
<th>THEN select...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go to top of the page</td>
<td>Home</td>
</tr>
<tr>
<td>Go to bottom of the page</td>
<td>End</td>
</tr>
<tr>
<td>Go up to next section</td>
<td>Page Up</td>
</tr>
<tr>
<td>Go down to next section</td>
<td>Page Down</td>
</tr>
<tr>
<td>Move forward from link to link or to controls</td>
<td>Tab</td>
</tr>
<tr>
<td>Move backward from link to link or to controls</td>
<td>Shift + Tab</td>
</tr>
<tr>
<td>Select</td>
<td>Enter/Spacebar</td>
</tr>
</tbody>
</table>
Objects will be **highlighted in blue** when using the **tab key** to move from object to object on the page. Here is an example of Quick Add before, and after tabbing through each object:

**Before**

![Quick Add (Your Name) form before tabbing](image1)

**After**

![Quick Add (Your Name) form after tabbing](image2)

Keyboard shortcuts can also be used in the time sheet’s drop-down menus when they are selected. **Drop-down keyboard shortcuts include:**

<table>
<thead>
<tr>
<th>IF you want to...</th>
<th>THEN select...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toggle individual items</td>
<td>Up Arrow/Down Arrow</td>
</tr>
<tr>
<td>Go to next group of items in the drop-down list</td>
<td>Page Up/Page Down</td>
</tr>
<tr>
<td>Go to top of the drop-down list</td>
<td>Home</td>
</tr>
<tr>
<td>Go to bottom of the drop-down list</td>
<td>End</td>
</tr>
</tbody>
</table>
Adding New Time Entries

Select Week (Step 1)

By default the time sheet will navigate to the week of the current date. To select a different date use the field titled Select Week. Use the pop-up calendar, or type in the date in MM/DD/YYYY format:

Quick Tip: The Time Sheet locks each month on the 11th at 11:59 p.m. for the previous month. For example, on July 12th no more time can be logged for the month of June. Contact ctsifin@umn.edu with questions.
Quick Add (Step 2)
The Quick Add section is used to add project-related time entries to the time sheet. Entries are logged by week. To change the view to another week use the Select Week feature. A description of each field in the Quick Add is described below:

**Project**
The project the entry should be associated to.
Format: [CTR Portal #] - [Title] - [PI Name] - [Additional Identifiers (IRB, OnCore, ClinicalTrials.gov)]

**Activity**
The activity that was performed.

**Date of Service**
The date the activity was performed.

**Hours**
Hours spent performing the activity in increments of 0.25 hours (15 minutes).

**Time Type**
Regular or Exempt. Regular is the default. Exempt time is time incurred on the project, but should not be billed to the study (i.e. training of new staff, or re-work).

**Comment**
Comments about the entry. These will attach to the entry, and are available to view later.
To add a new entry to your time sheet complete all fields, and select **Add**. **Comments are optional**:

Quick Add (Your Name)

Week of 2016-06-13

Please select a Project / Activity combination from the dropdowns and then click **Add**.

**Project:**
889701 - Time-Tracking 2.0 - PI: First name L

**Activity:**
Monitor Report Writing (Regulatory)

**Date of service**
06-13-2016

**Hours**
1.5

**Time Type**
Regular

**Comment**
Your comment

---

Quick Add (Your Name)

Week of 2016-05-30

An error message will appear if the form is incomplete, or if the entry already exists.

Quick Add (Your Name)

Week of 2016-05-30

Entry already exists.

---

**Quick Tip:** Can’t find a project or activity? You may not be configured for the project, or in the right role. Contact ctsifin@umn.edu for assistance.
**Review (Step 3)**

A line for the activity will be added to the Time Sheet, and **the entry will be saved automatically**:

The newly added entry from the previous step. Entries with comments will be highlighted.

Once the activity has been added to the Time Sheet, then additional hours for that activity can be added, modified or removed for that week. Check for the **Saved** notification to confirm the Time Sheet was updated:

**Quick Tip:** Time entries are saved automatically. Tabbing out or clicking away from a field after adding, modifying or removing a time entry will update the time sheet.
Managing Existing Time Entries
Once an entry has been added to the timesheet, it can be modified or removed until the lock date for the entry has passed. Entries will appear below the Search/Filter section, and above the General Time section (see Time Sheet Overview).

Time Entry Views
Entries can be displayed in three ways: By Project (default), By Activity or in an Itemized list:

By Project
This view will display time entries by project while each activity with reported time for that week will appear nested under its associated project record:
By Project - Overview

The By Project view offers useful features that assist in managing time entries. Time Sheet will highlight identifiers, comments, exempt time, and service types:

- **Project #, Short Title, and PI Name**
- **Unique Identifiers: IRB #, OnCore Protocol #, TASCs ID**
- **Highlighted Comments attached to entries, or Exempt Time**
- **Service Line that corresponds to the activity type (i.e. Regulatory)**

**Quick Tip:** If project details should be updated, including titles, PI name or unique identifiers use the CTR Portal Project Update Request Form located on the [CTSI website](http://www.ctsi.umn.edu). Contact ctsifin@umn.edu for assistance.
**By Project - Comments**
Quickly edit existing comments, or add new comments by selecting the comment button next to each entry:

The Time Entry Note pop-up modal will appear for that entry. Select Update Comment when finished making updates to the entry’s comments. Press the Cancel button, or Close the modal if no updates are needed.

**Quick Tip:** Hover your cursor over the comment button to preview the comment.

**By Project – Exempt Time**
View, add, modify or remove Exempt Time by toggling the Show Exempt checkbox:
By Project – Additional Features

Each project on the Time Sheet can be collapsed to improve navigation. Toggle the arrow button in the upper-right corner of any project entry in order to collapse the entry:

Once the entry is collapsed a button will display the number of activities being hidden. Click the **Show X Activities** button to expand the project entry:

Save ongoing activity-project combinations to Time Sheet for use in future weeks by toggling the favorite button. See the **Favorite Activities** section for more information:
By Activity
This view will display time entries by activity while each project with reported time for that week will appear nested under its associated activity:

Activity: Monitor Report Writing

Associated Projects # 889701, 889719

By Activity – Overview
Much of the same features from the By Project view are also implemented in the By Activity view: highlighted identifiers, comments and exempt time.

Project #, Short Title, and PI Name

Highlighted Comments attached to entries, or Exempt Time

Unique Identifiers: IRB #, OnCore Protocol #, TASCS ID
By Activity - Comments
Quickly edit existing comments, or add new comments by selecting the comment button next to each entry:

The Time Entry Note pop-up modal will appear for that entry. Select Update Comment when finished making updates to the entry’s comments. Press the Cancel button, or Close the modal if no updates are needed.

Quick Tip: Hover your cursor over the comment button to preview the comment.

By Activity – Exempt Time
View, add, modify or remove Exempt Time by toggling the Show Exempt checkbox:
By Activity – Additional Features

Each activity on the Time Sheet can be collapsed to improve navigation. Toggle the arrow button in the upper-right corner of any activity entry in order to collapse the entry:

Once the entry is collapsed a button will display the number of projects being hidden. Click the **Show X Projects** button to expand the project entry:

Save ongoing activity-project combinations to Time Sheet for use in future weeks by toggling the favorite button. See the **Favorite Activities** section for more information:
Itemized

This view arranges all individual entries in an itemized list. This view implements an additional filter that allows the entries to be sorted by date of service or CTR Portal #. Additionally, the entries can be filtered to display exempt time only. By default, the entries are sorted by the date of service.

**Itemized – Overview**

In the itemized view, the project information and identifiers appear in one column. The details of the activity, including the date of service, hours, activity, and any comments are also displayed as individual columns.

**Additional filter**

- **Individual entries by project-activity combination**
- **Project #, Short Title, PI Name and unique identifiers**

**Itemized – Edit Entries**

To edit an entry, select the **Edit** button under the **Action** column.
Time Sheet will redirect you to the **Edit Entry** screen. Here make changes to the Project, Activity, Date of Service, Hours and Comments. Update the entry by saving, or delete the entry all together:

**EDIT ENTRY**

- **Project**:
  - 889701 - Time-Tracking 2.0

- **Activity**: Monitor Report Writing (Regulatory)

- **Date of Service**: 06-15-2016

- **Hours**: 1.5

- **Comment**: Your comment

[Save Entry]  [Delete Entry]

Delete the entry by pressing the Delete Entry button.

Update the entry by pressing the Save Entry button.

**Itemized – Exempt Time**

Exempt time is highlighted, but cannot be edited from this view. Use an alternative view, such as **By Project** or **By Activity** to edit exempt entries:
Search/Filter

Time Sheet offers an elastic search/filter feature located above the section for project-specific time entries. It is available in any Time Sheet view:

The filter will search as you type. Searchable fields include:

- CTR Portal #
- Short Title
- PI First Name and Last Name
- TASCS ID
- IRB #
- OnCore Protocol #
- Activity Name
General Time
The General Time section allows for the tracking of non-project related activities. To add an activity to the General Time section select an activity from the Activities drop-down, and select the Add button:

![General Time section]

**General Time - Comments**
Quickly edit existing comments, or add new comments by selecting the comment button next to each entry:

![Comment button]

The Time Entry Note pop-up modal will appear for that entry. Select Update Comment when finished making updates to the entry’s comments. Press the Cancel button, or Close the modal if no updates are needed.

**Quick Tip:** Hover your cursor over the comment button to preview the comment.
General Time – Additional Features
Save ongoing activity-project combinations to Time Sheet for use in future weeks by toggling the favorite button. See the Favorite Activities section for more information:

<table>
<thead>
<tr>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication</td>
</tr>
<tr>
<td>Professional Development</td>
</tr>
<tr>
<td>General Time</td>
</tr>
</tbody>
</table>
**Favorite Activities**

Activities that are frequently used can be saved to your Time Sheet for use in future weeks. These *favorite* activities will appear on your Time Sheet until you remove them.

**Adding and Removing Favorites**

Once an activity has been added to your Time Sheet you can *favorite* the activity. Select the heart icon in the activity column in the *By Project* view, or the project column in the *By Activity* view:

![Image showing the heart icon being selected](image)

The heart icon will become *filled* indicating it is now a *favorite* activity:

![Images showing before and after](images)

Press the icon again to *remove* the activity as a favorite. The button can be toggled “on” and “off” as needed.
Another way to perform this process is to use the Manage Favorites feature. Click on the Manage Favorites button located next to the project views:

A pop-up modal will appear that lists all favorited project-activity combinations. Remove a favorite activity using the red Delete button:

**NOTE: This will not remove the entry from your Time Sheet for weeks where time is logged for that activity**

**General Time** favorites will be highlighted with a blue tag titled General: