

## LifeWorks Office

**Bulletin: #123**

**Topic: New Budget Manager Feature in TimesheetX**

To: Student Work Supervisors

From: Dr. Mike Burnes

Date: January 14, 2021

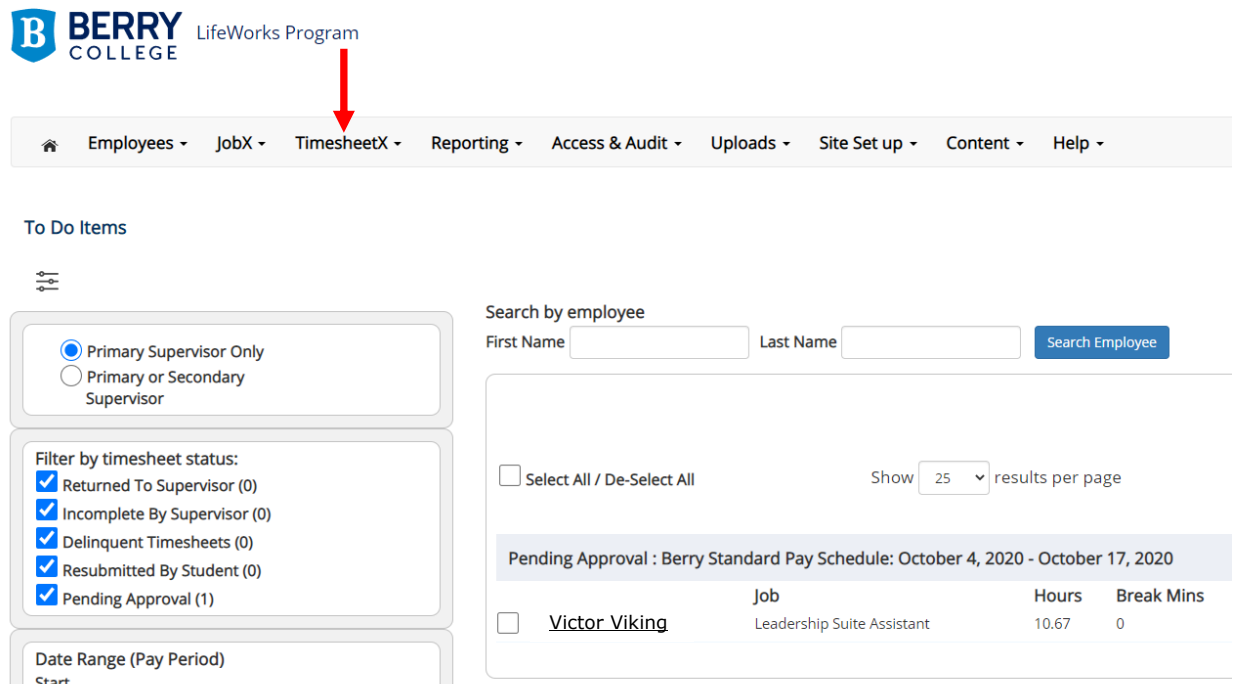
We have added a new feature to TimesheetX, the Budget Manager, which allows you to view:

1. Academic year budgets, expenditures to date, and remaining balance.
2. Projections of future expenditures and balances for your department.
3. Expenditures, balances, and projections of future expenditures and balances for each student.

We have two options for you to learn how to use this feature. First, we have written instructions with screenshots which begin below. Second, we have a 4-minute video posted in the Supervisor Resources area of the LifeWorks Resource Center website at <https://www.berry.edu/ppd/lifeworks/supervisor-resource-center>. We will also post this bulletin on the website for future reference.

### Instructions for Using the Budget Manager

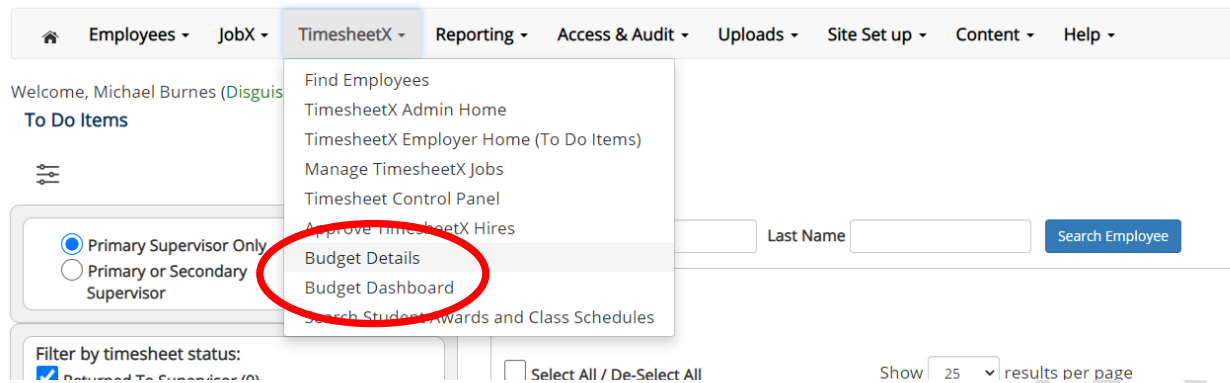
After logging into TimesheetX, click on “TimesheetX” on the top banner to activate a dropdown window.



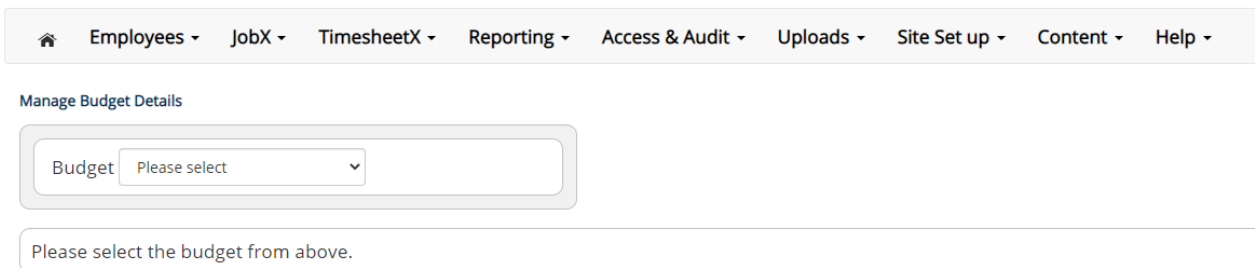
The screenshot shows the LifeWorks Program interface. At the top, the Berry College logo is on the left, and the text "LifeWorks Program" is on the right. Below this is a navigation bar with several dropdown menus: Employees, JobX, TimesheetX, Reporting, Access & Audit, Uploads, Site Set up, Content, and Help. A red arrow points to the "TimesheetX" dropdown menu. Below the navigation bar, the "To Do Items" section is visible. On the left, there are filters for "Primary Supervisor Only" (selected) and "Primary or Secondary Supervisor". Below these are filters for "Filter by timesheet status:" with checkboxes for "Returned To Supervisor (0)", "Incomplete By Supervisor (0)", "Delinquent Timesheets (0)", "Resubmitted By Student (0)", and "Pending Approval (1)". At the bottom left, there is a "Date Range (Pay Period)" section with a "Start" field. On the right, there is a "Search by employee" section with "First Name" and "Last Name" input fields and a "Search Employee" button. Below this is a "Select All / De-Select All" checkbox and a "Show 25 results per page" dropdown. A section titled "Pending Approval : Berry Standard Pay Schedule: October 4, 2020 - October 17, 2020" contains a table with columns for "Job", "Hours", and "Break Mins". The table lists "Victor Viking" as a "Leadership Suite Assistant" with 10.67 hours and 0 break minutes.

Job	Hours	Break Mins
Victor Viking	10.67	0

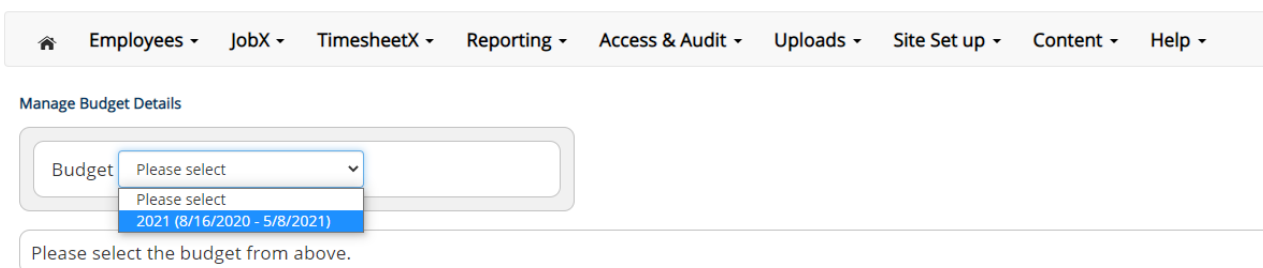
You will see “Budget Details” and “Budget Dashboard” as two options in the dropdown.



Selecting “Budget Details” opens the following window. Click on the down arrow. If you have permissions to more than one department, you will have a dropdown with which to select the department you want to view.



Select from the available list of budgets. In this case only the current academic year is loaded.



The resulting window displays the current budget, actual expenditures, the balance and the threshold. The threshold value determines when you will receive a warning that you have nearly exhausted the

available balance. The system is not currently configured to block hiring or timesheet approvals if the balance is negative.

Manage Budget Details

Budget: 2021 (8/16/2020 - 5/8/2021)

Current Budget: \$2,600.00  
Total Earnings: \$1,120.82  
Total Remaining Budget Balance: \$1,479.18

[View all notes](#)

☐ Select All / De-Select All Show 25 results per page

Name	Current Budget	Actual Earnings	Actual Remaining Budget Balance	Threshold
<input type="checkbox"/> Berry T-shirt Department	\$2,600.00	\$1,120.82	\$1,479.18	\$260.00

Click on “TimesheetX” on the top banner to reactivate the TimesheetX dropdown window.

Select “Budget Dashboard.”

Manage Budget Details

Budget: 2021 (8/16/2020 - 5/8/2021)

Current Budget: \$2,600.00  
Total Earnings: \$1,120.82  
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TimesheetX -

- Find Employees
- TimesheetX Admin Home
- TimesheetX Employer Home (To Do Items)
- Manage TimesheetX Jobs
- Timesheet Control Panel
- Approve TimesheetX Hires
- Budget Details
- Budget Dashboard**
- Search Student Awards and Class Schedules

Name	Current Budget	Actual Earnings	Actual Remaining Budget Balance	Threshold
<input type="checkbox"/> Berry T-shirt Department	\$2,600.00	\$1,120.82	\$1,479.18	\$260.00

Select the budget year again. If you have permissions to more than one department, you will have a dropdown with which to select the department you want to view.

#### Budget Manager Dashboard

Budget

Please select

Cost Center

2021 (8/16/2020 - 5/8/2021)

ership

Filter

No Filter

The resulting window displays the same information as the “Details” window, but it also displays projected earnings and balance. The system calculates projected earnings using three values: time (number of weeks), wage rate, and number of weekly hours in the original hire request. This screen adds the calculated earnings for all students in the department. Original Projected earnings are based on the entire budget period. Current Projected Earnings are based on what has been paid to date plus what is calculated to be paid by the end of the budget period. In this case, there is a projected overage of \$233.40 by the end of the period. Clicking “View Jobs” provides projected data for each job.

#### Budget Manager Dashboard

Budget

2021 (8/16/2020 - 5/8/2021)

Cost Center

Berry T-shirt

Filter

No Filter

Export Details						
Cost Center Name	Current Budget	Actual Earnings	Actual Remaining Budget Balance	Original Projected Earnings	Current Projected Earnings	Projected Remaining Budget Balance
Berry T-shirt Department	\$2,600.00	\$1,120.82	\$1,479.18	\$2,822.58	\$2,833.40	(\$233.40)
						<a href="#">View Jobs</a>

The screen will also display the number of hires along with options to View Hire information for each hire. The button on the far right provides limited timesheet information by pay period for each hire, but the system provides a much better way to view timesheets after you click the View Hire button.

#### Budget Dashboard Home > Jobs

Budget Info

2021 (08/16/2020-05/08/2021)

No Filter

Export Details					
Berry T-shirt Department	# of Hires	Original Projected Earnings	Current Projected Earnings	Actual Earnings	
		\$2,822.58	\$2,833.40	\$1,120.82	
Job Title					
Coordinator	1	\$1,411.29	\$1,619.42	\$763.13	<a href="#">View Hires</a>
Assistant	2	\$1,411.29	\$1,213.98	\$357.69	<a href="#">View Hires</a>
					<a href="#">View Timesheets</a>
					<a href="#">View Timesheets</a>

Clicking View Hires will display all hires for the job along with projected earnings information. Once on this screen, you can click either “View Hire Details” or “View Timesheets.” Both take you to the same screen, just different tabs.

[Budget Dashboard Home](#) > [Jobs](#) > Hires

Budget Info

2021 (08/16/2020-05/08/2021)

No Filter

Export Details

Berry T-shirt	Coordinator Job	Original Projected Earnings	Current Projected Earnings	Actual Earnings
		\$1,411.29	\$1,619.42	\$763.13

Current Hires

Employee Name	Start Date	End Date	Hire Status				
Raquel Luna	08/16/2020	05/08/2021	Active	\$1,411.29	\$1,619.42	\$763.13	<div>View Hire Details</div> <div>View Timesheets</div>

In this example, I’ve clicked View Timesheets. I can also click on the “Hire Details” or “Hire Notes” tabs.

Hire Details

Time Sheets

Hire Notes

Time Sheets for Job: Coordinator

Status	Pay Period	Actual Earnings								
Never Started	December 13, 2020 - December 19, 2020 Sunday, December 13 - Saturday, December 19, 2020									
Dismissed	November 29, 2020 - December 12, 2020 Sunday, November 29 - Saturday, December 12, 2020									
Dismissed	November 15, 2020 - November 28, 2020 Sunday, November 15 - Saturday, November 28, 2020									
Dismissed	November 1, 2020 - November 14, 2020 Sunday, November 01 - Saturday, November 14, 2020									
Dismissed	October 18, 2020 - October 31, 2020 Sunday, October 18 - Saturday, October 31, 2020									
Approved	October 4, 2020 - October 17, 2020 Sunday, October 04 - Saturday, October 17, 2020	<table> <tr> <th>Description</th> <th>Total</th> <th>Hours</th> <th>Rate</th> </tr> <tr> <td>Regular Hours</td> <td>\$222.00</td> <td>24.00*</td> <td>9.25</td> </tr> </table> <div>* Estimated value - time sheet not yet finalized</div>	Description	Total	Hours	Rate	Regular Hours	\$222.00	24.00*	9.25
Description	Total	Hours	Rate							
Regular Hours	\$222.00	24.00*	9.25							
Finalized	September 20, 2020 - October 3, 2020 Sunday, September 20 - Saturday, October 03, 2020	<table> <tr> <th>Description</th> <th>Total</th> <th>Hours</th> <th>Rate</th> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </table>	Description	Total	Hours	Rate				
Description	Total	Hours	Rate							

Clicking on “Hire Details” provides hire information about the student such as ID, hire approval date, and hire dates. Clicking on the “Hire Notes” tabs provides administrative information about the hire such as hire submission date, hire approval, date and even the name of the person who completed each action.

Finally, for those so inclined, wherever you see the “Export Details” symbol, you can click it and receive and Excel friendly csv file of the information on your screen.



We hope you like the Budget Manager. At this point, the actual earnings information and ability to view timesheets will likely be the most useful features. Since the accuracy of the projected earnings

calculations depends on how many hours you hired each student for, it may not provide the most accurate information. For example if you submitted a student hire for 12 hours, but the student typically works only 6, the feature will predict higher than actual expenses. If you would like to edit the hours for a particular student, please e-mail [LifeWorks@berry.edu](mailto:LifeWorks@berry.edu). As we approach the next budget cycle later in the spring, we will work with you to help you to develop accurate hours estimates.

LifeWorks Bulletin