Manager Reference: WorkEffort

Authors:

Les Austin

David Jones

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.1: TaskList 1
  .1.1: main 1
  .1.2: Discussion 1
  .1.3: mytasks 1
  .1.4: link buttons 2
  .1.5: Assigned Tasks 2
    .1.5.1: Start Date/Time 2
    .1.5.2: Priority 2
    .1.5.3: Status 2
    .1.5.4: TaskName 2
    .1.5.5: Edit >> Task Detail 2
  .1.6: Workflow activities assigned to user 2
    .1.6.1: Start Date / Time 3
    .1.6.2: Priority 3
    .1.6.3: Activity Status 3
    .1.6.4: Status 3
    .1.6.5: Role ID 3
    .1.6.6: Activity Name 3
    .1.6.7: Edit 3
  .1.7: Workflow activities assigned to User Role 3
  .1.8: Task Detail - New Task 3
    .1.8.1: EditWorkEffort-newTask 3
    .1.8.2: link buttons 4
    .1.8.3: Discussion 5
.2: Calendar 6
  .2.1: Discussion 6
  .2.2: day 6
  .2.3: link buttons 8
  .2.4: Day view 8
    .2.4.1: Time 8
    .2.4.2: Calendar Entries 8
  .2.5: Week view 8
    .2.5.1: week 8
    .2.5.2: link buttons 9
    .2.5.3: Time 9
    .2.5.4: Calendar Entries 9
  .2.6: Month view 9
    .2.6.1: month 10
    .2.6.2: link buttons 10
    .2.6.3: Discussion 10
  .2.7: Upcoming Events view 10
    .2.7.1: upcoming 11

    - .2.7.2: link buttons 11
    - .2.7.3: Start Date/Time 11
    - .2.7.4: End Date/Time 11
    - .2.7.5: Event Name 11
  - .2.8: Create New Event 12
    - .2.8.1: Create New Event 12
    - .2.8.2: event-new 12
    - .2.8.3: link buttons 13
    - .2.8.4: Discussion 14
  - .2.9: Event Details 14
- .3: My Time 15
  - .3.1: MyTimesheets 15
  - .3.2: link buttons 15
  - .3.3: My Current Timesheets 15
    - .3.3.1: Link to Create Timesheet for This Week 15
    - .3.3.2: Link to Create Timesheet 15
      - .3.3.2.1: EditTimesheet 15
      - .3.3.2.2: Discussion 16
    - .3.3.3: Timesheet Entries link 16
  - .3.4: My Rates 16
  - .3.5: Table of My Timesheets 16
- .4: Request List 17
  - .4.1: requestlist 17
  - .4.2: link buttons 17
  - .4.3: Cust Request ID 17
  - .4.4: Cust Request Name 17
  - .4.5: Priority 17
  - .4.6: Response Required Date 17
  - .4.7: Party ID 17
  - .4.8: Status ID 18
  - .4.9: Role Type ID 18
  - .4.10: Discussion 18
- .5: Work Effort 19
  - .5.1: Find Work Effort 19
    - .5.1.1: FindWorkEffort 19
    - .5.1.2: link buttons 21
    - .5.1.3: Discussion 21
    - .5.1.4: Search fields 21
      - .5.1.4.1: WorkEffort Id 21
      - .5.1.4.2: Work Effort Type Id (drop-down box) 21
      - .5.1.4.3: Status (drop-down box) 21
      - .5.1.4.4: Last Status Update (popup calendars) 21

.5.1.4.5: Work Effort Purpose Type Id (drop-down box) 21
.5.1.4.6: Work Effort Parent Id (popup search tool) 21
.5.1.4.7: Scope Enum Id (drop-down box) 21
.5.1.4.8: Priority 21
.5.1.4.9: Percent Complete 22
.5.1.4.10: Work Effort Name 22
.5.1.4.11: Description 22
.5.1.4.12: Location Desc 22
.5.1.4.13: Estimated Start Date (popup calendars) 22
.5.1.4.14: Estimated Completion Date (popup calendars) 22
.5.1.4.15: Actual Start Date (popup calendars) 22
.5.1.4.16: Actual Completion Date (popup calendars) 23
.5.1.4.17: Estimated Milli Seconds 23
.5.1.4.18: Estimated Setup Millis 23
.5.1.4.19: Estimate Calc Method 23
.5.1.4.20: Actual Milli Seconds 23
.5.1.4.21: Actual Setup Millis 23
.5.1.4.22: Total Milli Seconds Allowed 23
.5.1.4.23: Total Money Allowed 23
.5.1.4.24: Currency 23
.5.1.4.25: Special Terms 23
.5.1.4.26: Time Transparency 24
.5.1.4.27: Universal Id 24
.5.1.4.28: Source Reference Id 24
.5.1.4.29: Fixed Asset Id (popup search tool) 24
.5.1.4.30: Facility Id 24
.5.1.4.31: Info Url 24
.5.1.4.32: Service Loader Name 24
.5.1.4.33: Quantity To Produce 24
.5.1.4.34: Quantity Produced 24
.5.1.4.35: Quantity Rejected 24
.5.1.4.36: Reserv Persons 25
.5.1.4.37: Reserv2nd P P Perc 25
.5.1.4.38: Reserv Nth P P Perc 25
.5.1.4.39: Revision Number 25
.5.1.4.40: Created Date (popup calendars) 25
.5.1.4.41: Created By User Login 25
.5.1.4.42: Last Modified Date (popup calendars) 25
.5.1.4.43: Last Modified By User Login 25
.5.2: Work Effort - found 26
.5.2.1: ListWorkEfforts 26
.5.2.2: link buttons 26

.5.2.3: Table of existing Work Effort 26
.5.2.3.1: Work Effort ID 26
.5.2.3.2: Work Effort Type ID 26
.5.2.3.3: Work Effort Purpose Type ID 26
.5.2.3.4: Edit 27
.5.2.4: SubNodes Link 27
.5.2.4.1: ChildWorkEfforts 27
.5.2.4.2: link buttons 27
.5.2.5: Detail + SubNodes link 27
.5.2.5.1: phaselist 27
.5.2.5.2: Not Currently Available 28
.5.3: Add or Create Work Effort 28
.5.3.1: EditWorkEffort 28
.5.3.2: link buttons 29
.5.3.3: Quick Assign Party ID (popup search tool) 30
.5.3.4: Name * 30
.5.3.5: Description 30
.5.3.6: Type * (drop-down box) 30
.5.3.7: Purpose (drop-down box) 30
.5.3.8: Status (drop-down box) 30
.5.3.9: Percent Complete 30
.5.3.10: Priority (drop-down box) 30
.5.3.11: Scope (drop-down box) 30
.5.3.12: Estimated Start Date (popup calendar) 30
.5.3.13: Estimated Completion Date (popup calendar) 30
.5.3.14: Actual Start Date (popup calendar) 30
.5.3.15: Actual Completion Date (popup calendar) 30
.5.3.16: Quick Add Comm. Event ID (popup search tool) 30
.5.3.17: Work Effort Parent ID (popup search tool) 31
.5.3.18: Location Desc 31
.5.3.19: Estimated Milli Seconds 31
.5.3.20: Estimated Setup Millis 31
.5.3.21: Estimate Calc Method 31
.5.3.22: Actual Milli Seconds 31
.5.3.23: Actual Setup Millis 31
.5.3.24: Total Milli Seconds Allowed 31
.5.3.25: Total Money Allowed 31
.5.3.26: Currency (drop-down box) 31
.5.3.27: Special Terms 31
.5.3.28: Time Transparency 31
.5.3.29: Universal ID 31
.5.3.30: Source Reference ID 31

.5.3.31: Fixed Asset ID (popup search tool) 32
.5.3.32: Facility ID (popup search tool) 32
.5.3.33: Info URL 32
.5.3.34: Service Loader Name 32
.5.3.35: Quantity To Produce 32
.5.3.36: Quantity Produced 32
.5.3.37: Quantity Rejected 32
.5.3.38: Reserv Persons 32
.5.3.39: Reserv2nd P P Perc 32
.5.3.40: Reserv Nth P P Perc 32
.5.3.41: Requirement ID (popup search tool) 32
.5.4: Edit Work Effort 32
.5.4.1: Summary 32
.5.4.1.1: WorkEffortSummary 32
.5.4.1.2: link buttons 33
.5.4.1.3: Work Effort section 33
.5.4.1.4: Party Assignments section 33
.5.4.1.5: Communication Events section 33
.5.4.1.6: Shopping Lists 33
.5.4.1.7: Quotes 33
.5.4.1.8: Orders 33
.5.4.2: Work Effort 34
.5.4.2.1: editWorkEffort 34
.5.4.2.2: link buttons 36
.5.4.2.3: Discussion 36
.5.4.2.4: Work Effort ID 36
.5.4.2.5: Revision Number 36
.5.4.3: Children 36
.5.4.3.1: ChildWorkEfforts-2 36
.5.4.3.2: link buttons 36
.5.4.3.3: Discussion 36
.5.4.4: Parties 37
.5.4.4.1: ListWorkEffortPartyAssigns 37
.5.4.4.2: link buttons 37
.5.4.4.3: Table of Work Effort Party Assignments 37
.5.4.4.4: Tool to Add Work Effort Party Assignment 38
.5.4.5: Rates 39
.5.4.5.1: EditWorkEffortAssignmentRates 39
.5.4.5.2: link buttons 39
.5.4.5.3: Table of Work Effort Assignment Rates 39
.5.4.5.4: Tool to Add Work Effort Assignment Rate 40
.5.4.6: Communications 40

.5.4.6.1: ListWorkEffortCommEvents 40
.5.4.6.2: link buttons 42
.5.4.6.3: Table of Work Effort Communication Events 42
.5.4.6.4: Tool to Add Work Effort Communication Event 42
.5.4.7: Shopping Lists 43
.5.4.7.1: ListWorkEffortShopLists 43
.5.4.7.2: link buttons 44
.5.4.7.3: Table of Work Effort Shopping Lists 44
.5.4.7.4: Tool to Add Work Effort Shopping List 44
.5.4.8: Requests 44
.5.4.8.1: ListWorkEffortRequests 45
.5.4.8.2: link buttons 45
.5.4.8.3: Table of Work Effort Requests 45
.5.4.8.4: Tool to Add Work Effort Request 45
.5.4.8.5: Table of Work Effort Request Items 46
.5.4.8.6: Tool to Add Work Effort Request Item 46
.5.4.9: Requirements 46
.5.4.9.1: ListWorkEffortRequirements 46
.5.4.9.2: link buttons 47
.5.4.9.3: Table of Work Effort Requirements 47
.5.4.9.4: Tool to Add Work Effort Requirements 48
.5.4.10: Quotes 48
.5.4.10.1: ListWorkEffortQuotes 48
.5.4.10.2: link buttons 49
.5.4.10.3: Table of Work Effort Quotes 49
.5.4.10.4: Tool to Add Work Effort Quote 49
.5.4.10.5: Table of Work Effort Quote Items 50
.5.4.10.6: Tool to Add Work Effort Quote Items 50
.5.4.11: Orders 50
.5.4.11.1: ListWorkEffortOrderHeaders 50
.5.4.11.2: link buttons 51
.5.4.11.3: Table of Work Effort Orders 51
.5.4.11.4: Tool to Add Order to Work Effort 51
.5.4.12: Time Entries 51
.5.4.12.1: EditWorkEffortTimeEntries 52
.5.4.12.2: link buttons 52
.5.4.12.3: Table of Time Entries 52
.5.4.12.4: Tool to Add Time Entry to Work Effort 53
.5.4.12.5: Tool to Add Work Effort Time to Invoice 53
.5.4.12.6: Tool to Add Work Effort Time to New Invoice 54
.6: Time Sheet 55
.6.1: Find Timesheet 55

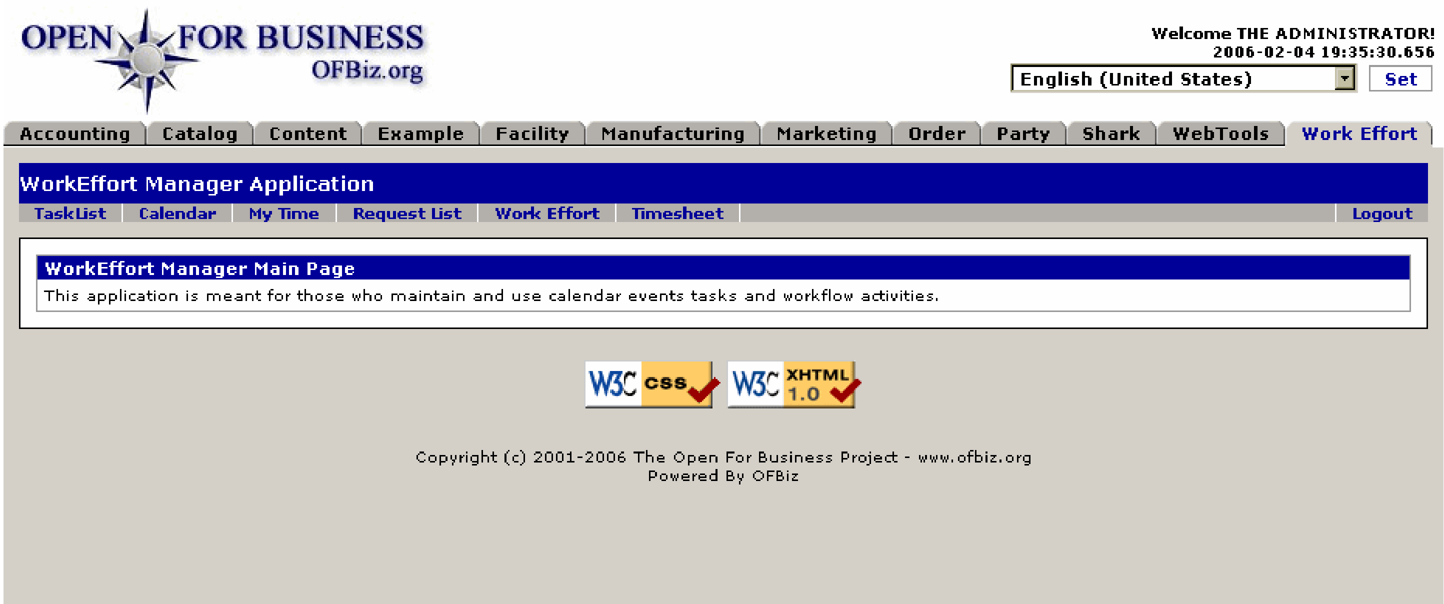
.6.1.1: FindTimesheet 55
.6.1.2: link buttons 55
.6.1.3: Timesheet ID 55
.6.1.4: Party (popup search tool) 55
.6.1.5: Client Party ID 56
.6.1.6: From Date (popup calendars) 56
.6.1.7: Thru Date (popup calendars) 56
.6.1.8: Comments 56
.6.1.9: Table of found timesheets 56
.6.1.9.1: Timesheet ID 56
.6.1.9.2: Party ID 56
.6.1.9.3: Client Party ID 56
.6.1.9.4: From Date 56
.6.1.9.5: Thru Date 56
.6.1.9.6: Comments 56
.6.2: Edit Timesheet 56
.6.2.1: EditTimesheet-existing 56
.6.2.2: link buttons 57
.6.2.3: Timesheet ID 57
.6.2.4: Party * (popup search tool) 57
.6.2.5: Client Party ID (popup search tool) 57
.6.2.6: From Date (popup calendar) 58
.6.2.7: Thru Date (popup calendar) 58
.6.2.8: Comments 58
.6.2.9: Summary Timesheet table 58
.6.2.9.1: Party 58
.6.2.9.2: From Date 58
.6.2.9.3: Thru Date 58
.6.2.9.4: Rate Type 58
.6.2.9.5: Work Effort ID 58
.6.2.9.6: Invoice ID 58
.6.2.9.7: Invoice Item Seq ID 58
.6.2.9.8: Hours 58
.6.2.9.9: Comments 58
.6.2.10: Invoice ID (popup search tool) 58
.6.2.11: Bill From Party (popup search tool) 58
.6.2.12: Bill To Party (popup search tool) 59
.6.3: Parties 59
.6.3.1: EditTimesheetRoles 59
.6.3.2: link buttons 59
.6.3.3: Table of existing Roles 59
.6.3.3.1: Role 59

.6.3.3.2: Party 59
.6.3.4: Tool to assign Party and Role 59
.6.3.4.1: Party (popup search tool) 59
.6.3.4.2: Role (drop-down box) 60
.6.4: Entries 60
.6.4.1: createTimeSheetEntry 60
.6.4.2: link buttons 60
.6.4.3: Table of Timesheet Entries 60
.6.4.3.1: Party (popup search tool) 60
.6.4.3.2: From Date (popup calendar) 61
.6.4.3.3: Thru Date (popup calendar) 61
.6.4.3.4: Rate Type (drop-down box) 61
.6.4.3.5: Work Effort ID 61
.6.4.3.6: Hours 61
.6.4.3.7: Comments 61
.6.4.4: Party (popup search tool) 61
.6.4.5: From Date (popup calendar) 61
.6.4.6: Thru Date (popup calendar) 61
.6.4.7: Rate Type 61
.6.4.8: Work Effort ID (popup search tool) 61
.6.4.9: Hours 61
.6.4.10: Comments 61

.1 TaskList

.1.1 main

id:[14208] image: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Welcome THE ADMINISTRATOR!
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English (United States)
Set
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Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
W3C CSS
W3C XHTML 1.0

WorkEffort Manager Main Page

This application is meant for those who maintain and use calendar events tasks and workflow activities.

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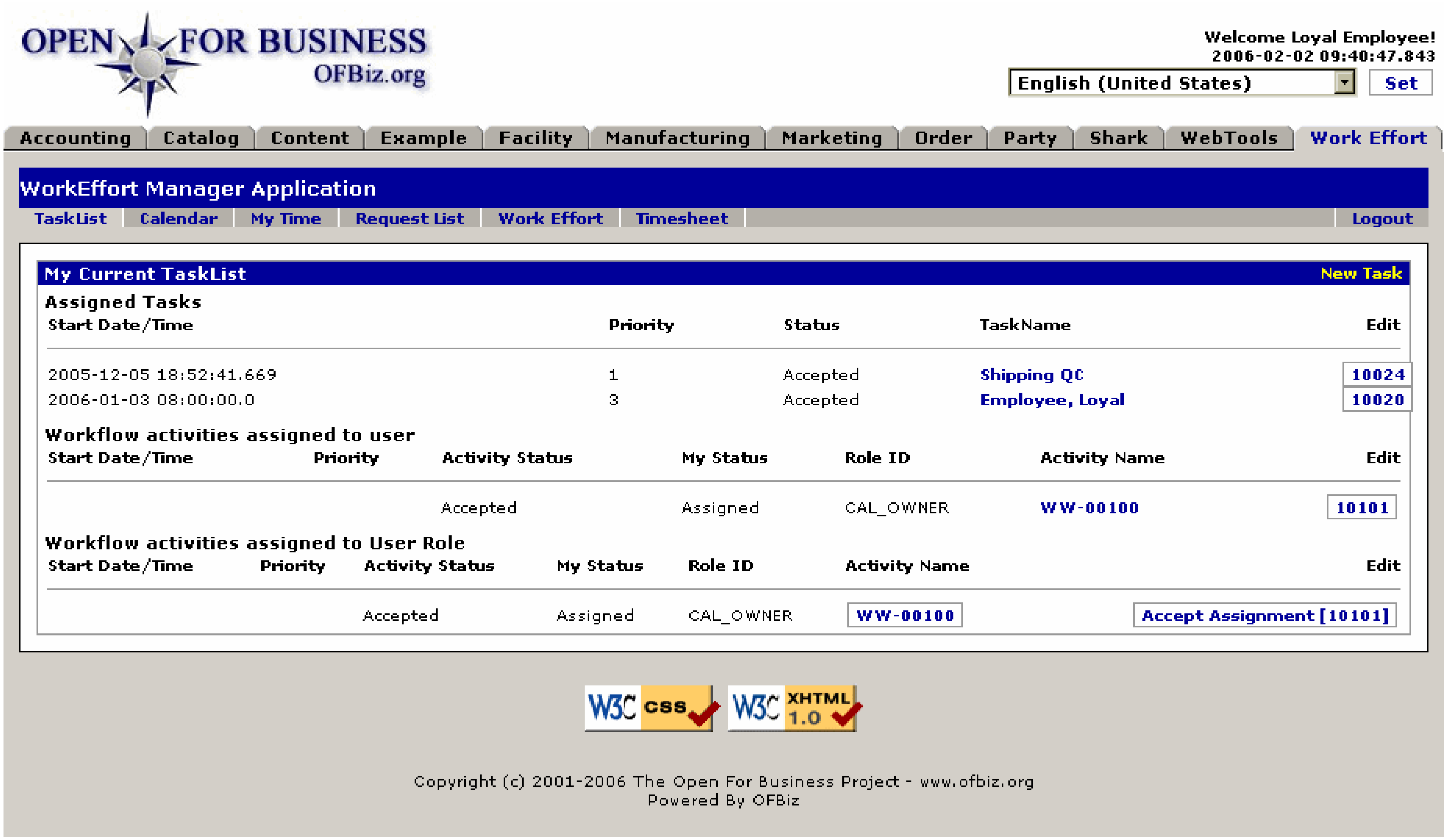
The Main Page in the Work Effort Manager quickly defers to the TaskList.

.1.2 Discussion

The Main screen above is usually displaced by the mytasks screen shown below. Current tasks listed are for the one who has logged into the application.

.1.3 mytasks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Welcome Loyal Employee!
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New Task
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Assigned Tasks

Start Date/Time	Priority	Status	TaskName	Edit
2005-12-05 18:52:41.669	1	Accepted	Shipping QC	10024
2006-01-03 08:00:00.0	3	Accepted	Employee, Loyal	10020

Workflow activities assigned to user

Start Date/Time	Priority	Activity Status	My Status	Role ID	Activity Name	Edit
		Accepted	Assigned	CAL_OWNER	WW-00100	10101

Workflow activities assigned to User Role

Start Date/Time	Priority	Activity Status	My Status	Role ID	Activity Name	Edit
		Accepted	Assigned	CAL_OWNER	WW-00100	Accept Assignment [10101]

All current Tasks for the logged-in Party are displayed here at "My Current TaskList." Click the TaskName or number to edit.

.1.4 link buttons

[New Task] [Accept Assignment ...]

.1.5 Assigned Tasks

Tasks assigned to you by others will appear here on your list. You might have the option to delegate the task to others or to decline the task; use the Edit Task button to bring up that screen. Space is provided to annotate reasons for actions or to leave notes for yourself as work progresses.

.1.5.1 Start Date/Time

When the Task is scheduled to begin.

.1.5.2 Priority

Assigned priority from 9 (low) to 1 (highest).

.1.5.3 Status

Either click on this Task Name or the ID number in the Edit column to be taken to the Work Effort tab > Summary screen.

.1.5.4 TaskName

Either click on this Task Name or the ID number to be taken to the Work Effort tab > Summary screen.

.1.5.5 Edit >> Task Detail

Either click on this ID number or the Task Name to be taken to the Work Effort tab > Summary screen.

.1.6 Workflow activities assigned to user

.1.6.1 Start Date / Time

If given, when the work began or is scheduled to begin.

.1.6.2 Priority

What Priority or level of importance has been assigned to this Activity.

.1.6.3 Activity Status

The status of the Workflow Activity as far as the system is concerned.

.1.6.4 Status

Your status in working through the Activity from your perspective.

.1.6.5 Role ID

What is your assigne Role in this Activity.

.1.6.6 Activity Name

The name of the Activity which includes the current assignment.

.1.6.7 Edit

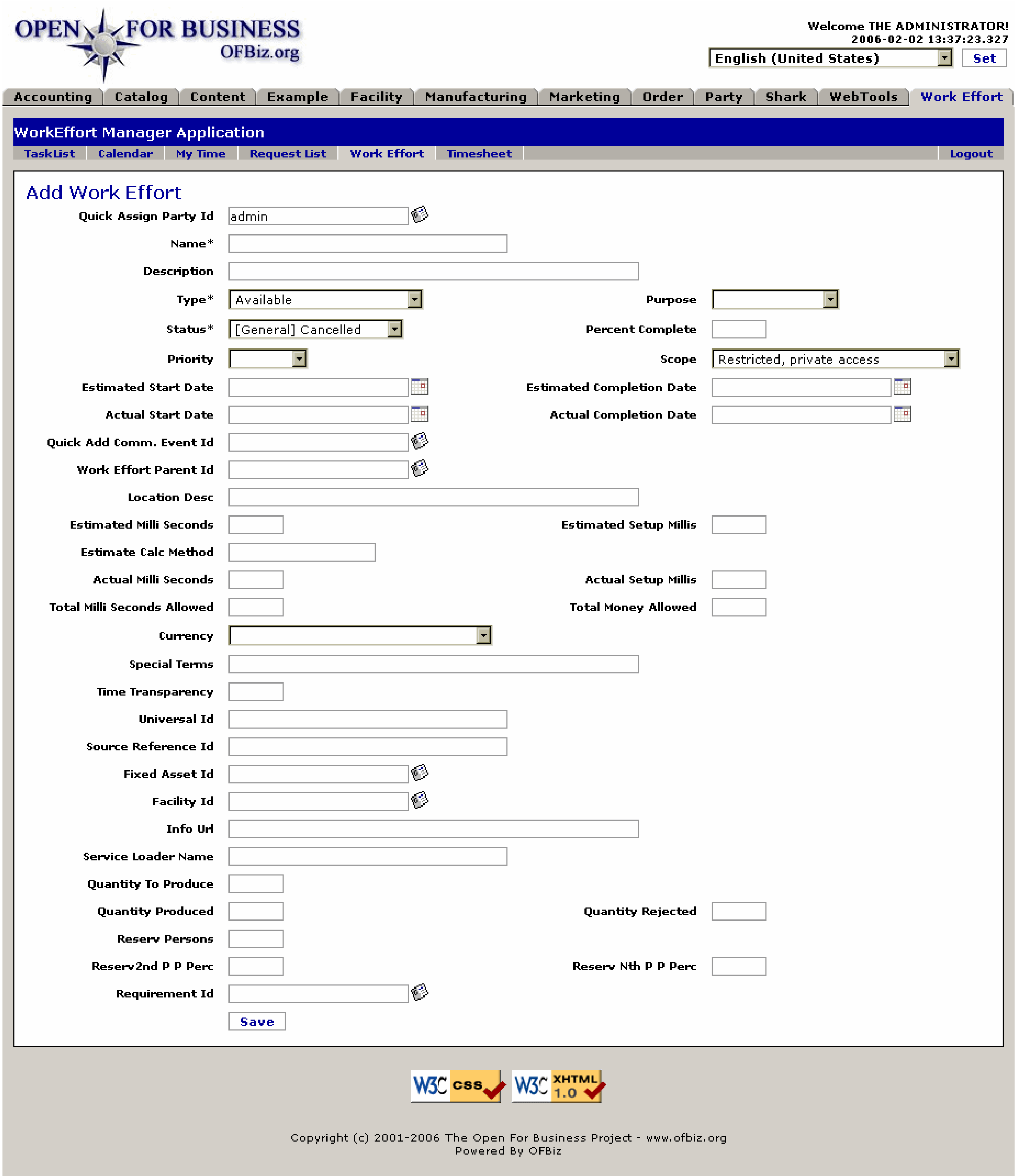
Under the 'Workflow activities assigned to user' section, click on this to view or edit the Assignment; takes you to the Work Effort tab. <P> Under the 'Workflow activities assigned to User Role' section, click on this to accept the assignment.

.1.7 Workflow activities assigned to User Role

The column headings are the same as under 'Workflow activities assigned to user', above. The difference is between the User and the Role.

.1.8 Task Detail - New Task

.1.8.1 EditWorkEffort-newTask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Request List
Work Effort
Timesheet
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Name*
Description
Purpose
Percent Complete
Priority
Estimated Start Date
Estimated Completion Date
Actual Start Date
Actual Completion Date
Quick Add Comm. Event Id
Work Effort Parent Id
Location Desc
Estimated Milli Seconds
Estimated Setup Millis
Estimate Calc Method
Actual Milli Seconds
Actual Setup Millis
Total Milli Seconds Allowed
Total Money Allowed
Currency
Special Terms
Time Transparency
Universal Id
Source Reference Id
Fixed Asset Id
Facility Id
Info Url
Service Loader Name
Quantity To Produce
Quantity Produced
Quantity Rejected
Reserv Persons
Reserv2nd P P Perc
Reserv Nth P P Perc
Requirement Id
Save
W3C css
W3C XHTML 1.0

Add Work Effort

Quick Assign Party Id: admin

Type*: Available

Status*: [General] Cancelled

Scope: Restricted, private access

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New Tasks are created in a screen identical to the Edit Task screen. This is a generic screen, found under the Work Effort tab.

.1.8.2 link buttons

[Save]

.1.8.3 Discussion

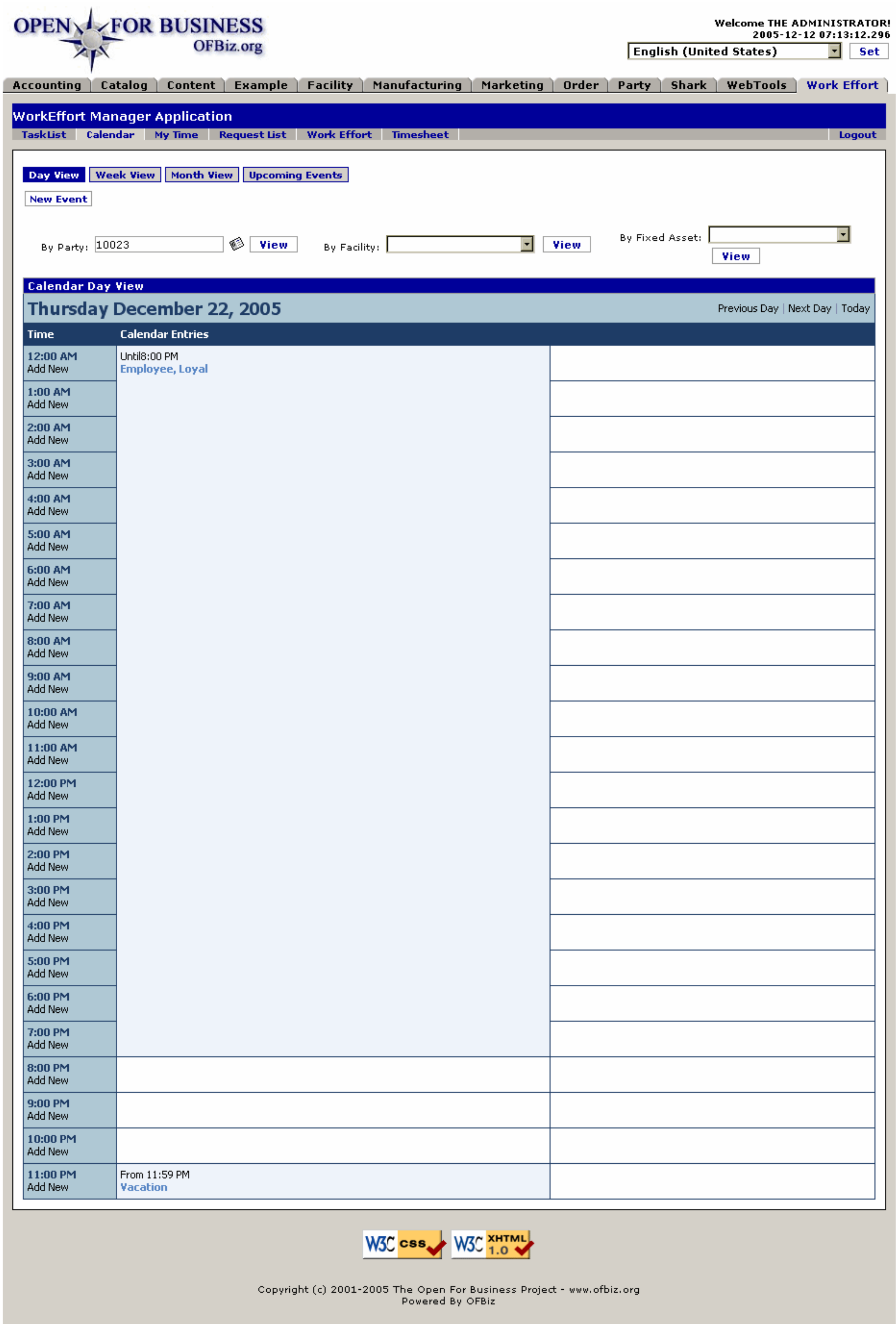
Each of the fields is discussed below under the Work Effort tab.

.2 Calendar

.2.1 Discussion

Click upon highlighted events within any calendar to be taken to the Calendar Event Details edit screen. <P> Use the selection tools By Party, By Facility and By Fixed Asset to change to a calendar associated with the Party, Facility or Fixed Asset you wish to see. Subsequent 'View' changes will remain with the same Party, Facility or Asset you have then selected.

.2.2 day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Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Day View
Week View
Month View
Upcoming Events
New Event
View
View
View
W3C CSS
W3C XHTML 1.0

By Party: 10023

By Facility:

By Fixed Asset:

Calendar Day View

Thursday December 22, 2005

Previous Day | Next Day | Today

Time	Calendar Entries	
12:00 AM Add New	Until8:00 PM Employee, Loyal	
1:00 AM Add New		
2:00 AM Add New		
3:00 AM Add New		
4:00 AM Add New		
5:00 AM Add New		
6:00 AM Add New		
7:00 AM Add New		
8:00 AM Add New		
9:00 AM Add New		
10:00 AM Add New		
11:00 AM Add New		
12:00 PM Add New		
1:00 PM Add New		
2:00 PM Add New		
3:00 PM Add New		
4:00 PM Add New		
5:00 PM Add New		
6:00 PM Add New		
7:00 PM Add New		
8:00 PM Add New		
9:00 PM Add New		
10:00 PM Add New		
11:00 PM Add New	From 11:59 PM Vacation	

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View of the Day when Mr. Loyal Employee will be leaving for vacation. Work Event to 8:00pm; Vacation Event from midnight.

.2.3 link buttons

[New Event] [View] [Add New] [Previous Day] [Next Day] [Today] <B> [Day View] [Week View] [Month View] [Upcoming Events] </B>

.2.4 Day view

.2.4.1 Time

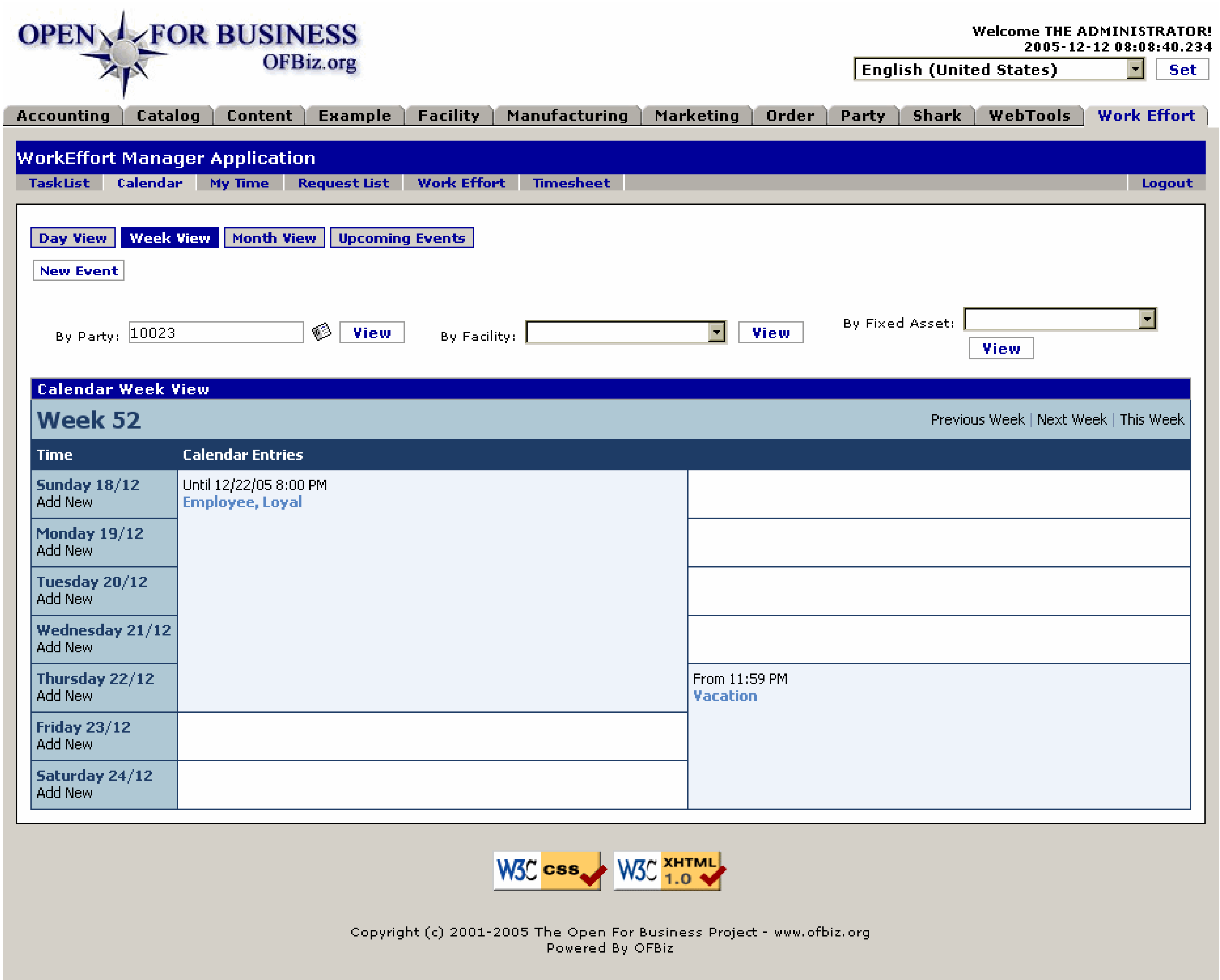
Expressed in hourly blocks for the entire day, every hour from midnight through 11:00pm. Click on the [Add New] link within each hour segment to add an event to that period.

.2.4.2 Calendar Entries

In the left-hand calendar entries column appears the scheduled start time and the name of the entry. Click on the name to see details or to edit the entry. <br> The right-hand column fills out when there are two or more entries for the same time period. Three or more columns may appear as needed.

.2.5 Week view

.2.5.1 week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WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
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Day View
Week View
Month View
Upcoming Events
New Event
View
View
View
Calendar Week View
Previous Week
Next Week
This Week
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By Party: 10023

By Facility:

By Fixed Asset:

Week 52

Time	Calendar Entries	
Sunday 18/12 Add New	Until 12/22/05 8:00 PM Employee, Loyal	
Monday 19/12 Add New		
Tuesday 20/12 Add New		
Wednesday 21/12 Add New		
Thursday 22/12 Add New		From 11:59 PM Vacation
Friday 23/12 Add New		
Saturday 24/12 Add New		

View of the calendar Week for an individual.

.2.5.2 link buttons

[Add New] [Previous Week] [Next Week] [This Week] [New Event] [View] <B>[Day View] [Week View] [Month View] [Upcoming Events]</B>

.2.5.3 Time

One block is given for each of the seven days. Click on the [Add New] link within each hour segment to add an event to that period.

.2.5.4 Calendar Entries

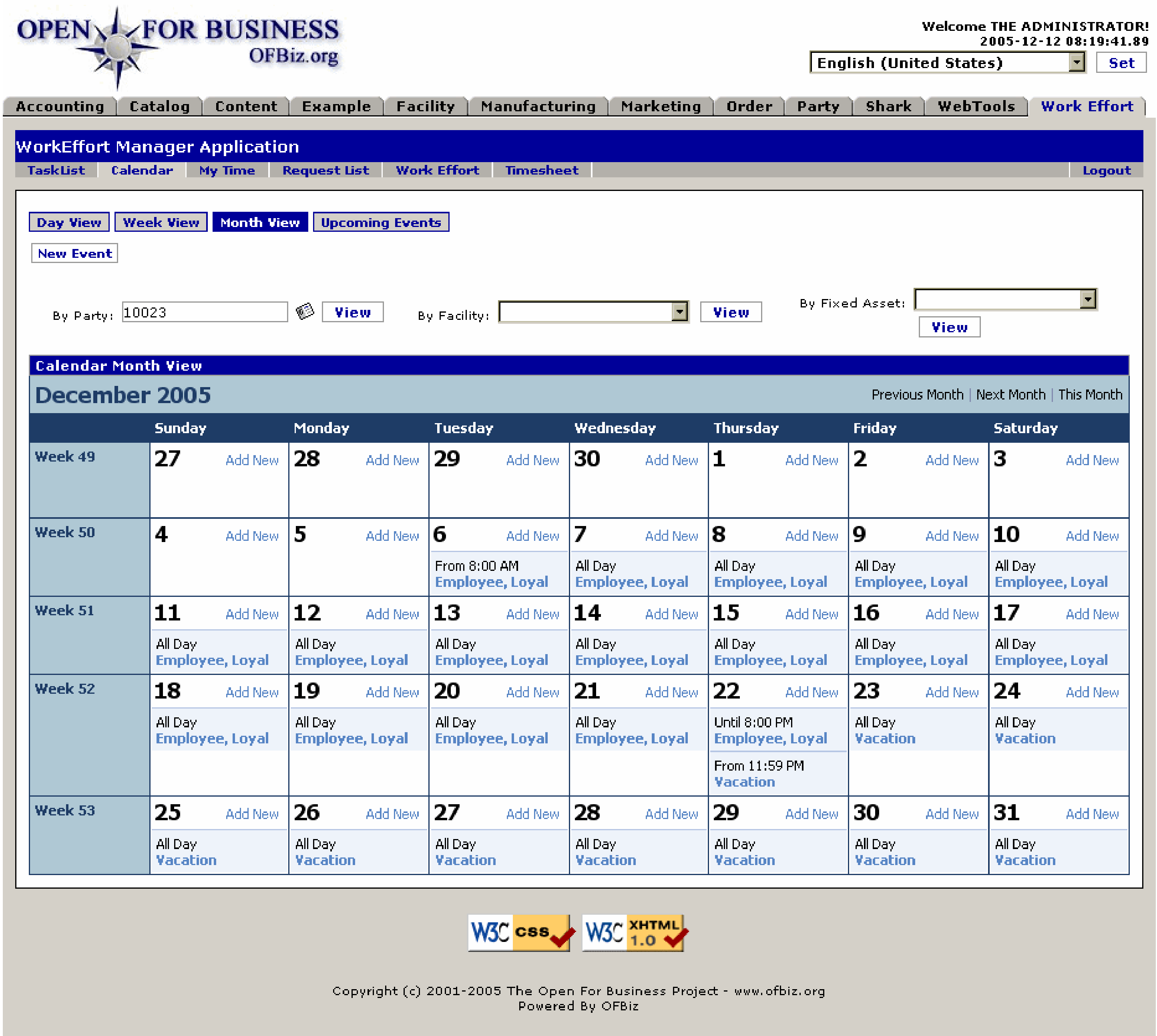
The name of the event and the time are given. Click on the name to view or edit under the Work Effort tab. Multiple events for the day are shown in additional columns, as needed.

.2.6 Month view

Note that weeks are numbered from the beginning of the year. Click on [Add New] to enter another event within any day.

.2.6.1 month

id:[DOCWRK1917] image:


OPEN FOR BUSINESS
OFBiz.org
Welcome THE ADMINISTRATOR!
2005-12-12 08:19:41.89
English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Day View
Week View
Month View
Upcoming Events
New Event
View
View
View
Calendar Month View
Previous Month
Next Month
This Month
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By Party: 10023

By Facility:

By Fixed Asset:

December 2005

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Week 49	27 Add New	28 Add New	29 Add New	30 Add New	1 Add New	2 Add New	3 Add New
Week 50	4 Add New	5 Add New	6 Add New From 8:00 AM Employee, Loyal	7 Add New All Day Employee, Loyal	8 Add New All Day Employee, Loyal	9 Add New All Day Employee, Loyal	10 Add New All Day Employee, Loyal
Week 51	11 Add New All Day Employee, Loyal	12 Add New All Day Employee, Loyal	13 Add New All Day Employee, Loyal	14 Add New All Day Employee, Loyal	15 Add New All Day Employee, Loyal	16 Add New All Day Employee, Loyal	17 Add New All Day Employee, Loyal
Week 52	18 Add New All Day Employee, Loyal	19 Add New All Day Employee, Loyal	20 Add New All Day Employee, Loyal	21 Add New All Day Employee, Loyal	22 Add New Until 8:00 PM Employee, Loyal From 11:59 PM Vacation	23 Add New All Day Vacation	24 Add New All Day Vacation
Week 53	25 Add New All Day Vacation	26 Add New All Day Vacation	27 Add New All Day Vacation	28 Add New All Day Vacation	29 Add New All Day Vacation	30 Add New All Day Vacation	31 Add New All Day Vacation

Space for busy days will expand as needed to accommodate more events.

.2.6.2 link buttons

[New Event] [View] [Add New] [Previous Month] [Next Month] [This Month] <B>[Day View] [Week View] [Month View] [Upcoming Events] </B>

.2.6.3 Discussion

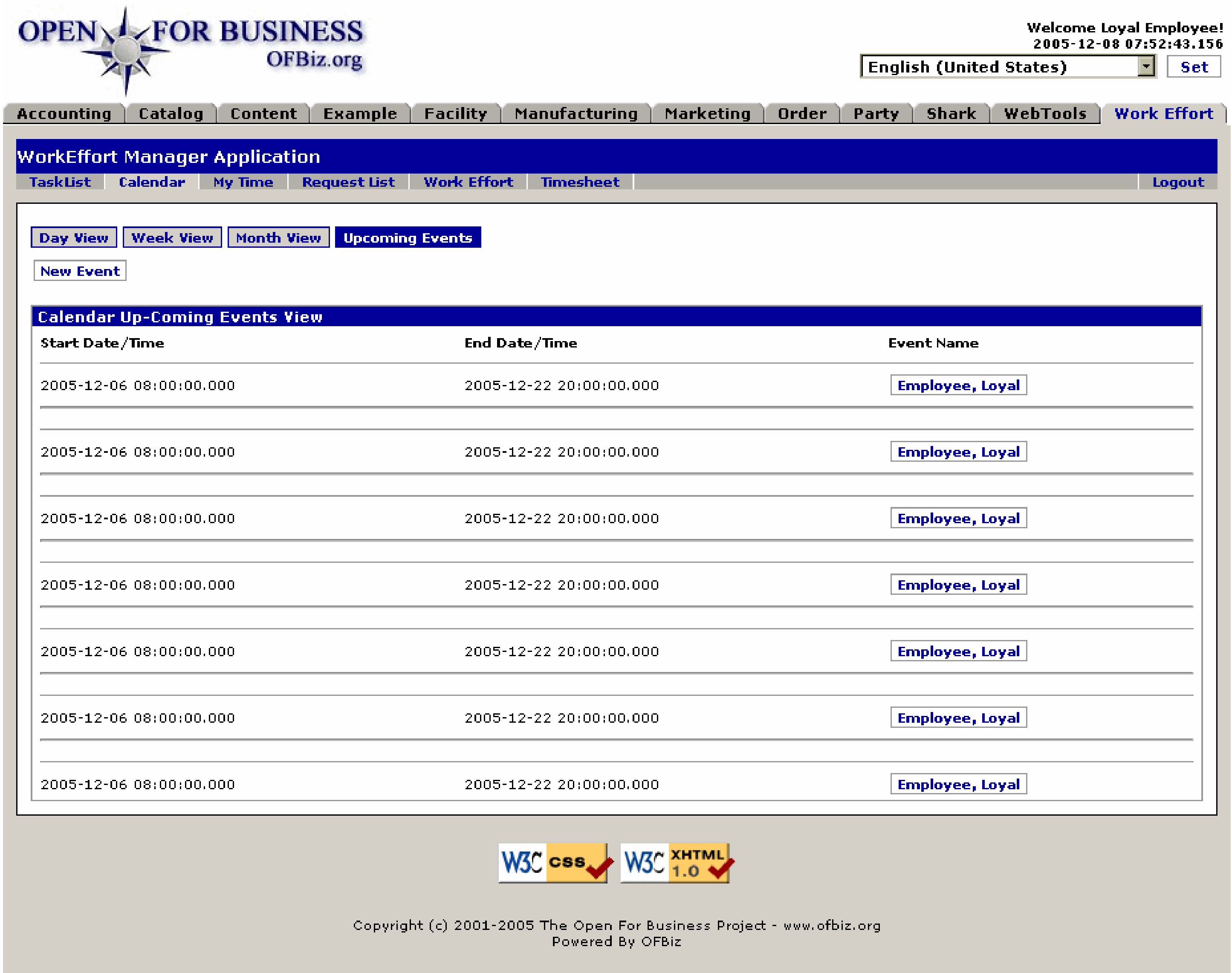
Click on the name of any event to View or Edit that event. Click on [Add New] within any day block to add another Event to that Day. This will go into the Calendar for the logged-in Party by default.

.2.7 Upcoming Events view

Events scheduled for the current day and into the future are listed. Click on the Event Name to be taken to the Calendar Event Details screen.

.2.7.1 upcoming

id:[DOCWRK1920] image:


OPEN FOR BUSINESS
OFBiz.org
Welcome Loyal Employee!
2005-12-08 07:52:43.156
English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Day View
Week View
Month View
Upcoming Events
New Event
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Calendar Up-Coming Events View

Start Date/Time	End Date/Time	Event Name
2005-12-06 08:00:00.000	2005-12-22 20:00:00.000	Employee, Loyal
2005-12-06 08:00:00.000	2005-12-22 20:00:00.000	Employee, Loyal
2005-12-06 08:00:00.000	2005-12-22 20:00:00.000	Employee, Loyal
2005-12-06 08:00:00.000	2005-12-22 20:00:00.000	Employee, Loyal
2005-12-06 08:00:00.000	2005-12-22 20:00:00.000	Employee, Loyal
2005-12-06 08:00:00.000	2005-12-22 20:00:00.000	Employee, Loyal
2005-12-06 08:00:00.000	2005-12-22 20:00:00.000	Employee, Loyal

When one event crosses multiple days, each day is shown as a separate Event, although not labeled by day here.

.2.7.2 link buttons

[New Event] [View] <B>[Day View] [Week View] [Month View] [Upcoming Events] </B>

.2.7.3 Start Date/Time

When the entire event (not just the day's segment) did or will become active.

.2.7.4 End Date/Time

When the Event will be completed.

.2.7.5 Event Name

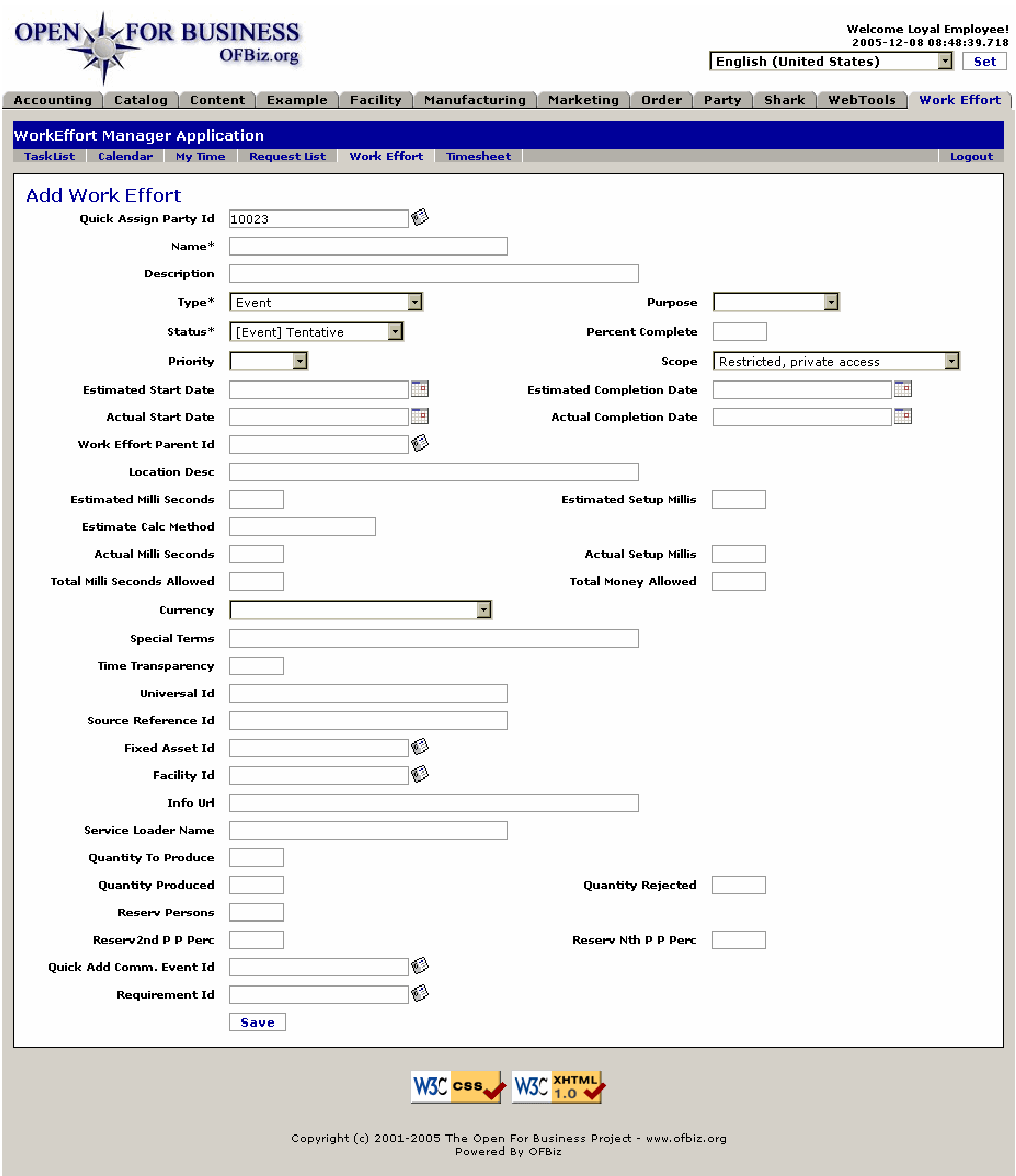
Click on this name to view or edit the event under the Work Effort tab.

.2.8 Create New Event

.2.8.1 Create New Event

Screen is similar to the Calendar Event Details screen but is not yet populated; see Event, following.

.2.8.2 event-new


OPEN FOR BUSINESS
OFBiz.org
Welcome Loyal Employee!
2005-12-08 08:48:39.718
English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Save
W3C CSS
W3C XHTML 1.0

Add Work Effort

Quick Assign Party Id	10023		
Name*			
Description			
Type*	Event	Purpose	
Status*	[Event] Tentative	Percent Complete	
Priority		Scope	Restricted, private access
Estimated Start Date		Estimated Completion Date	
Actual Start Date		Actual Completion Date	
Work Effort Parent Id			
Location Desc			
Estimated Milli Seconds		Estimated Setup Millis	
Estimate Calc Method			
Actual Milli Seconds		Actual Setup Millis	
Total Milli Seconds Allowed		Total Money Allowed	
Currency			
Special Terms			
Time Transparency			
Universal Id			
Source Reference Id			
Fixed Asset Id			
Facility Id			
Info Url			
Service Loader Name			
Quantity To Produce			
Quantity Produced		Quantity Rejected	
Reserv Persons			
Reserv2nd P P Perc		Reserv Nth P P Perc	
Quick Add Comm. Event Id			
Requirement Id			

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New Event takes you to this EditWorkEffort screen under the WorkEffort tab. See that section discussed below.

.2.8.3 link buttons

[Save]

.2.8.4 Discussion

Please look under the Work Effort tab for a discussion of this screen. The same screen is used for creating Work Effort items and Calendar Events, or to edit existing ones. The only difference is in the upper left-hand corner label.

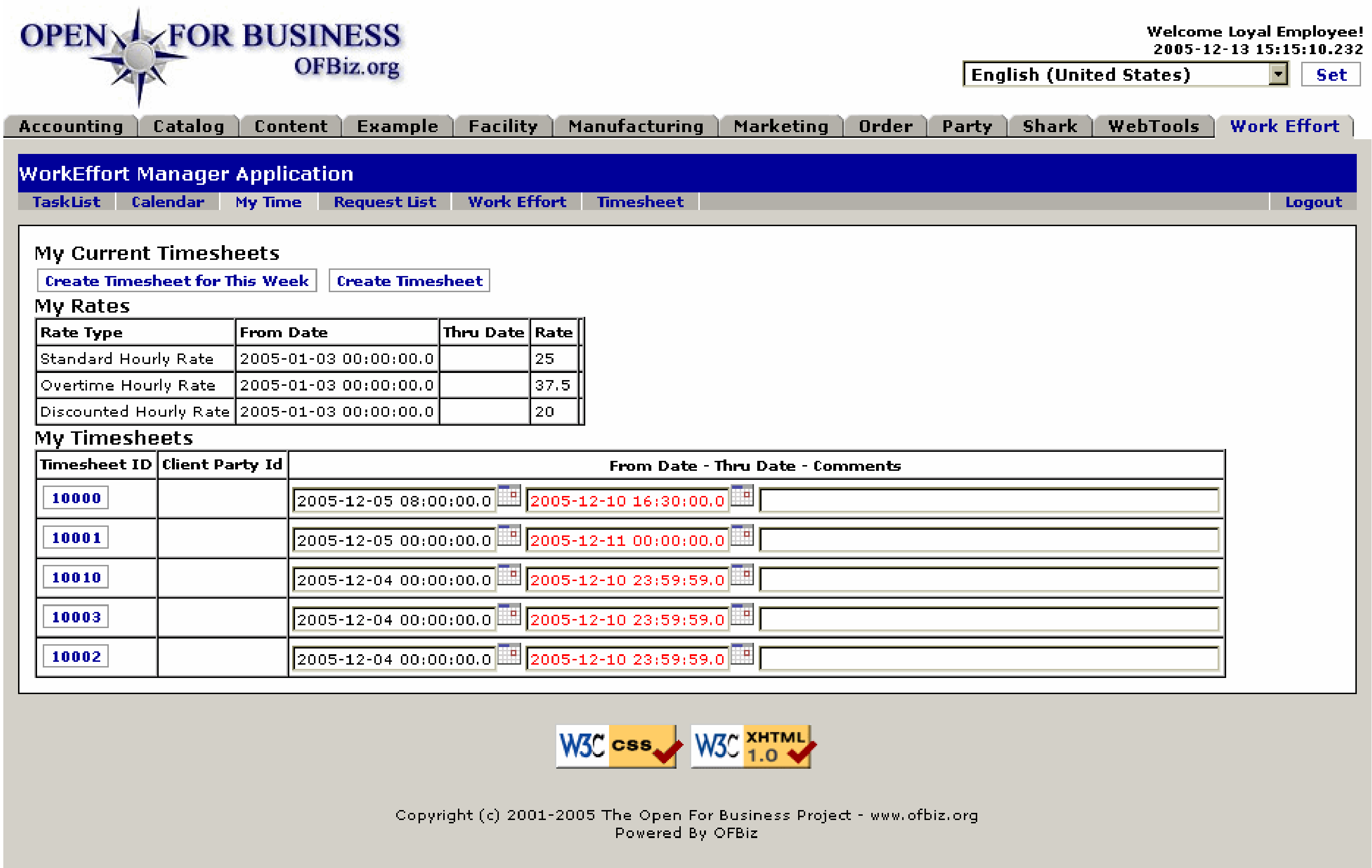
.2.9 Event Details

When you click on an Event Name, you are taken to the Work Effort tab where you can see the details and work with that event. Please read further under the Work Effort tab.

.3 My Time

.3.1 MyTimesheets

id:[13695] image:


OPEN FOR BUSINESS
OFBiz.org
Welcome Loyal Employee!
2005-12-13 15:15:10.232
English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Create Timesheet for This Week
Create Timesheet

My Current Timesheets

My Rates

Rate Type	From Date	Thru Date	Rate
Standard Hourly Rate	2005-01-03 00:00:00.0		25
Overtime Hourly Rate	2005-01-03 00:00:00.0		37.5
Discounted Hourly Rate	2005-01-03 00:00:00.0		20

My Timesheets

Timesheet ID	Client Party Id	From Date - Thru Date - Comments		
10000		2005-12-05 08:00:00.0	2005-12-10 16:30:00.0	
10001		2005-12-05 00:00:00.0	2005-12-11 00:00:00.0	
10010		2005-12-04 00:00:00.0	2005-12-10 23:59:59.0	
10003		2005-12-04 00:00:00.0	2005-12-10 23:59:59.0	
10002		2005-12-04 00:00:00.0	2005-12-10 23:59:59.0	

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Once identified by their User Login, Employees have quick access to their timesheets at this screen.

.3.2 link buttons

[Create Timesheet for This Week] [Create Timesheet] [Quick Time Entry] [Timesheet Entries]

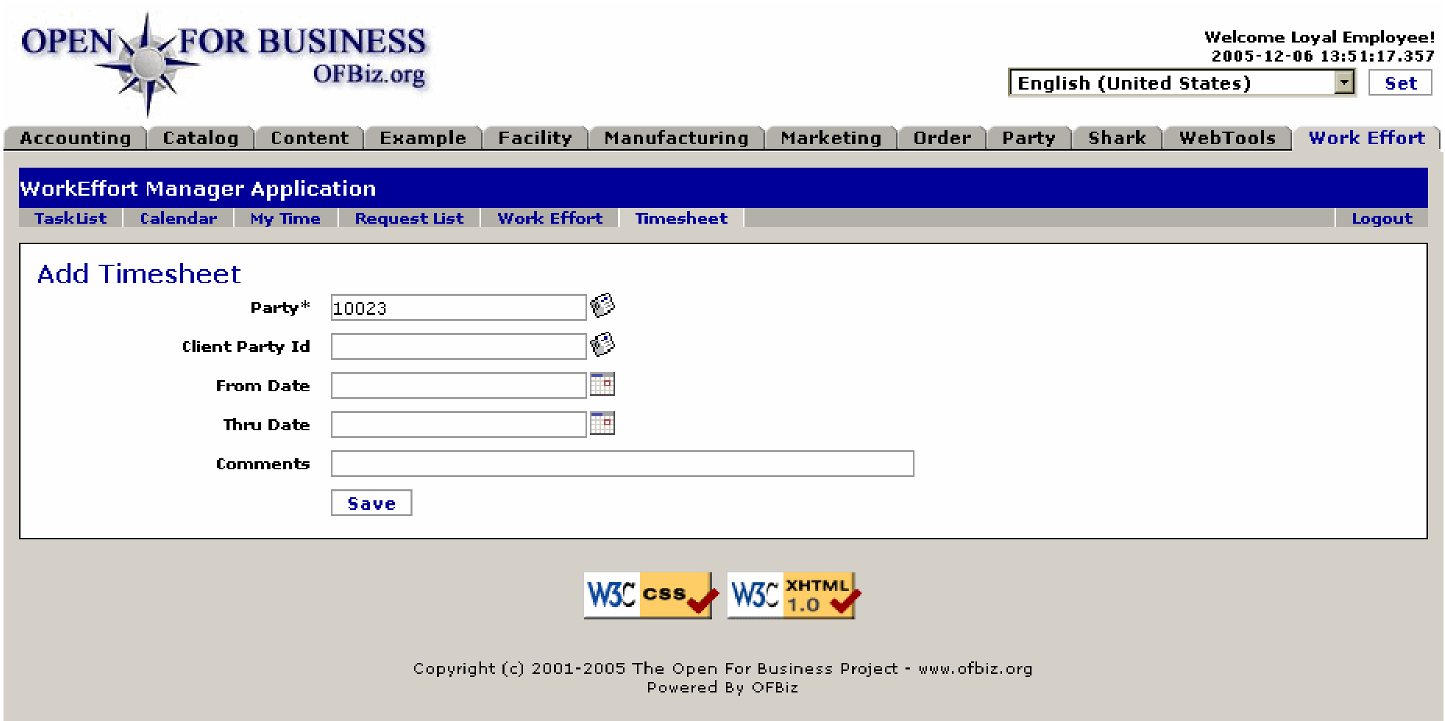
.3.3 My Current Timesheets

.3.3.1 Link to Create Timesheet for This Week

Just click on this link once to have a new timesheet created for the current week. It will appear in the table at the bottom of this screen.

.3.3.2 Link to Create Timesheet

.3.3.2.1 EditTimesheet



OPEN FOR BUSINESS
OFBiz.org
Welcome Loyal Employee!
2005-12-06 13:51:17.357
English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Save
W3C CSS
W3C XHTML 1.0
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Add Timesheet

Party*	10023
Client Party Id	
From Date	
Thru Date	
Comments	

To create a timesheet for another employee, another client, and/or another time period, use this screen.

.3.3.2.2 Discussion

This action is performed under the Timesheet tab; please see that, below, for further details.

.3.3.3 Timesheet Entries link

Use the Timesheet ID in the table below to quickly link to that Timesheet.

.3.4 My Rates

Rates are set under the Party Manager > Find Party tab > Rates sub-tab. They are applied to Work Effort under the Work Effort > Rates tab. They are displayed here for information purposes only.

.3.5 Table of My Timesheets

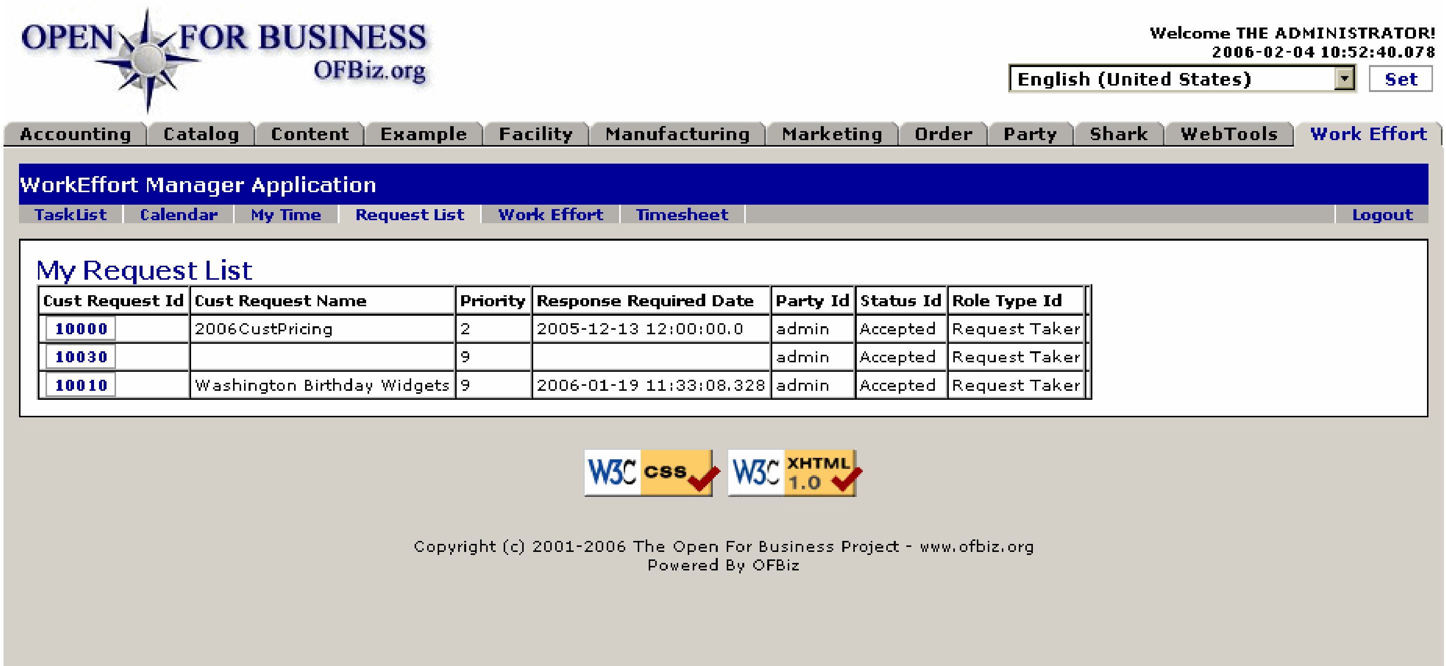
An employee may have many different Timesheets, reflecting different projects, tasks, or assignments. All current and future timesheets are listed here. Click on the Timesheet ID to edit that timesheet under the Timesheet tab.

.4 Request List

To work with or edit a selected Request, click on the number associated with the Request under the Cust Request ID column.

.4.1 requestlist

id:[DOCWRK2005] image:


OPEN FOR BUSINESS
OFBiz.org
Welcome THE ADMINISTRATOR!
2006-02-04 10:52:40.078
English (United States)
Set
Accounting
Catalog
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Example
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Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout

My Request List

Cust Request Id	Cust Request Name	Priority	Response Required Date	Party Id	Status Id	Role Type Id
10000	2006CustPricing	2	2005-12-13 12:00:00.0	admin	Accepted	Request Taker
10030		9		admin	Accepted	Request Taker
10010	Washington Birthday Widgets	9	2006-01-19 11:33:08.328	admin	Accepted	Request Taker

W3C CSS
W3C XHTML 1.0

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Current or active Requests are listed at this screen. To return to this screen, select another tab then re-select Requests.

.4.2 link buttons

- none - except the Cust Request ID number

.4.3 Cust Request ID

Click on the number in this column to be taken to the Edit screen for that Request. This will take you back to the Order Manager > Requests tab.

.4.4 Cust Request Name

The name you or the Requestor assigned to the request.

.4.5 Priority

1 - 9, 1 is highest.

.4.6 Response Required Date

When the Requester submitted his request, he most likely asked for your response by a certain date and time. You may have negotiated a different time with him, but the determined date is what needs to be here. This is your deadline for completion of the Request.

.4.7 Party ID

Generally, viewing this list, this would be the User ID of the person or party currently logged in. This is their list, the requests to which they are a party.

.4.8 Status ID

As the Request is received, submitted, reviewed, accepted, completed, or has some other action taken, the Status will be changed to reflect the current condition of the process. Choices could include the following: <P><B> --- <br> Accept Request (Accepted) <br> Reject Request (Rejected) <br> Review Request (Reviewed) <br> Cancel Request (Cancelled) </B>

.4.9 Role Type ID

Roles are assigned to assure accountability in the process. Roles could be one of the following: <P><B> WorkEffortRequestingParty <br> Order Agent <br> Request Taker <br> Request Manager</B>

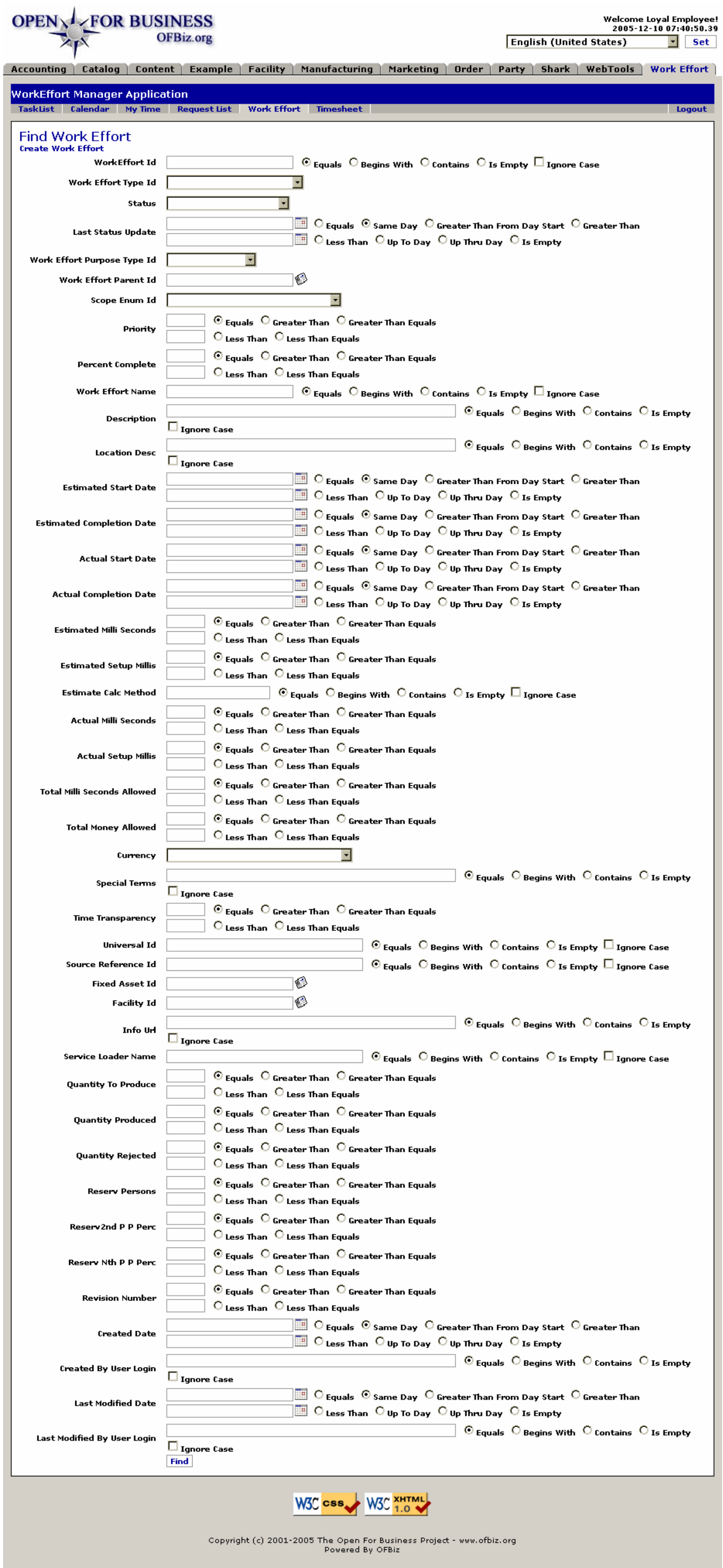
.4.10 Discussion

All of the editing of Requests is now done under the Order Manager > Requests tab. Clicking on the Request ID will take you back there.

.5 Work Effort

.5.1 Find Work Effort

.5.1.1 FindWorkEffort



Find Work Effort

Create Work Effort

WorkEffort Id: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Work Effort Type Id:

Status:

Last Status Update: ○ Equals ● Same Day ○ Greater Than From Day Start ○ Greater Than / ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty

Work Effort Purpose Type Id:

Work Effort Parent Id:

Scope Enum Id:

Priority: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Percent Complete: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Work Effort Name: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Description: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Location Desc: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Estimated Start Date: ○ Equals ● Same Day ○ Greater Than From Day Start ○ Greater Than / ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty

Estimated Completion Date: ○ Equals ● Same Day ○ Greater Than From Day Start ○ Greater Than / ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty

Actual Start Date: ○ Equals ● Same Day ○ Greater Than From Day Start ○ Greater Than / ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty

Actual Completion Date: ○ Equals ● Same Day ○ Greater Than From Day Start ○ Greater Than / ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty

Estimated Milli Seconds: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Estimated Setup Millis: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Estimate Calc Method: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Actual Milli Seconds: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Actual Setup Millis: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Total Milli Seconds Allowed: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Total Money Allowed: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Currency:

Special Terms: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Time Transparency: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Universal Id: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Source Reference Id: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Fixed Asset Id:

Facility Id:

Info Url: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Service Loader Name: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Quantity To Produce: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Quantity Produced: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Quantity Rejected: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Reserv Persons: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Reserv2nd P P Perc: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Reserv Nth P P Perc: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Revision Number: ● Equals ○ Greater Than ○ Greater Than Equals / ○ Less Than ○ Less Than Equals

Created Date: ○ Equals ● Same Day ○ Greater Than From Day Start ○ Greater Than / ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty

Created By User Login: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Last Modified Date: ○ Equals ● Same Day ○ Greater Than From Day Start ○ Greater Than / ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty

Last Modified By User Login: ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Find

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The search tool screen for finding Work Effort is similar to the Create Work Effort screen but with search parameters.

.5.1.2 link buttons

[Create Work Effort] [Find]

.5.1.3 Discussion

Use the search methods discussed under other Managers with Open For Business. You may search under almost any criteria as shown here. Use the radio buttons to set ranges or to require precision with the parameters. <p> While the search terms mirror the full Work Effort screen terms which are discussed more completely under the <I>Create or Edit Work Effort</I> section, below, there are some search criteria not included in the Create/Edit screen. Therefore, you will see some duplication but not all of these fields are found in the Edit screen.

.5.1.4 Search fields

.5.1.4.1 WorkEffort Id

If you know what it is, enter it here with the 'Equals' radio button selected. That will be all you need to enter. <P> If you know just a few characters, enter those and select the 'Begins With' or 'Contains' button. As such a search could return many hits, also identify some other known data, such as the approximate dates, to reduce the number of returns.

.5.1.4.2 Work Effort Type Id (drop-down box)

What Type of a Work Effort is this? Select from one of the following: <P><B> Available <br> Event <br> Fixed Asset Usage (rental) <br> Production Run Header <br> Production Run Task <br> Program <br> Project <br> Project Phase <br> Routing <br> Routing Task <br> Task <br> Workflow Activity <br> Workflow Process </B><P> CAUTION: If you happen to select a type different from what your sought-for Work Effort actually is, you will not be able to find it Best to leave this field blank unless you are sure!

.5.1.4.3 Status (drop-down box)

If you are sure what the last reported Status of the Work Effort was, you may select it from the drop-down box. Choices might include: <P><B> [General] Cancelled <br> [General] Declined <br> [General] Delegated <br> [General] Needs Action <br> [General] Sent <br> [Task] Accepted <br> [Task] Completed <br> [Event] Confirmed <br> [Event] Tentative </B>

.5.1.4.4 Last Status Update (popup calendars)

Here you have the tools to bracket the time frame within which you remember that Status of this Work Effort was last changed. <br> -1.) Choose the earliest possible date this could have been using the upper popup calendar. <br> -2.) Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered. <br> -3.) Choose the latest possible date and time the Status could have updated, using the lower of the two popup calendars. -4.) Select a matching radio button.<P> If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

.5.1.4.5 Work Effort Purpose Type Id (drop-down box)

What was the Purpose for the Work Effort? Select from these choices on the drop-down box: <B><P> Assembling <br> Deployment <br> Development <br> Email <br> Maintenance <br> Manufacturing <br> Meeting <br> Phase <br> Phone Call <br> Production Run <br> Project <br> Research <br> Sub-contracting <br> Support </B>

.5.1.4.6 Work Effort Parent Id (popup search tool)

If this Work Effort is the Child of another, identify its Parent here.

.5.1.4.7 Scope Enum Id (drop-down box)

Some of the Enums listed are: <B><br> General, public access Restricted, private access Very restricted, confidential access </B

.5.1.4.8 Priority

If you know the assigned Priority, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the priority with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.9 Percent Complete

If you know the Percent Complete, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Percent Complete with the lowest possible percentage in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.10 Work Effort Name

If you know the EXACT Work Effort Name, enter it with the Equals radio button selected. <br> If you know only part of the Name, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> If you are sure that there is no name assigned, you could leave the box blank but check the Is Empty radio button. <br> If not sure whether the name included UPPER or lower case letters, check the Ignore Case box.

.5.1.4.11 Description

If you know the EXACT Description, enter it with the Equals radio button selected. <br> If you know only part of the Description, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> If you are sure that there is no Description assigned, you could leave the box blank but check the Is Empty radio button. <br> If not sure whether the Description included UPPER or lower case letters, check the Ignore Case box.

.5.1.4.12 Location Desc

If you know the EXACT Location Description, enter it with the Equals radio button selected. <br> If you know only part of the Location Description, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> If you are sure that there is no Location Description assigned, you could leave the box blank but check the Is Empty radio button. <br> If not sure whether the Location Description included UPPER or lower case letters, check the Ignore Case box.

.5.1.4.13 Estimated Start Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember for the Estimated Start Date. <br> -1.) Choose the earliest possible date this could have been using the upper popup calendar. <br> -2.) Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered. <br> -3.) Choose the latest possible date and time the Estimated Start Date might have been set for, using the lower of the two popup calendars. -4.) Select a matching radio button.<P> If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

.5.1.4.14 Estimated Completion Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember Estimated Completion Date was set for. <br> -1.) Choose the earliest possible date this could have been using the upper popup calendar. <br> -2.) Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered. <br> -3.) Choose the latest possible date and time the Estimated Completion Date could have been, using the lower of the two popup calendars. -4.) Select a matching radio button.<P> If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

.5.1.4.15 Actual Start Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember the Work Effort actually started. <br> -1.) Choose the earliest possible date this could have been using the upper popup calendar. <br> -2.) Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered. <br> -3.) Choose the latest possible date and time the Actual Start Date could have been, using the lower of the two popup calendars. -4.) Select a matching radio button.<P> If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

.5.1.4.16 Actual Completion Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember for the Actual Completion Date. <br> -1.) Choose the earliest possible date this could have been using the upper popup calendar. <br> -2.) Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered. <br> -3.) Choose the latest possible date and time the Actual Completion Date was, using the lower of the two popup calendars. -4.) Select a matching radio button. <P> If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

.5.1.4.17 Estimated Milli Seconds

If you know the Estimated Milli Seconds, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Estimated Milli Seconds with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.18 Estimated Setup Millis

If you know the Estimated Setup Millis, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Estimated Setup Millis with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.19 Estimate Calc Method

If you know the EXACT Estimate Calc Method, enter it with the Equals radio button selected. <br> If you know only part of the Estimate Calc Method, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> If you are sure that there is no Estimate Calc Method assigned, you could leave the box blank but check the Is Empty radio button. <br> If not sure whether the Estimate Calc Method included UPPER or lower case letters, check the Ignore Case box.

.5.1.4.20 Actual Milli Seconds

If you know the Actual Milli Seconds, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Actual Milli Seconds with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.21 Actual Setup Millis

If you know the Actual Setup Millis, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Actual Setup Millis with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.22 Total Milli Seconds Allowed

If you know the Total Milli Seconds Allowed, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Total Milli Seconds Allowed with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.23 Total Money Allowed

If you know the Total Money Allowed, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Total Money Allowed with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.24 Currency

Select the National Currency used in this Work Effort.

.5.1.4.25 Special Terms

If you know the EXACT Special Terms, enter them with the Equals radio button selected. <br> If you know only part of the Special Terms, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> If you are sure that there are no Special Terms assigned, you could leave the box blank but check the Is Empty radio button. <br> If not sure whether the Special Terms included UPPER or lower case letters, check the Ignore Case box.

.5.1.4.26 Time Transparency

If you know the Time Transparency factor, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Time Transparency factor with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.27 Universal Id

If you know the EXACT Universal Id, enter it with the Equals radio button selected. <br> If you know only part of the Universal Id, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> If you are sure that there is no Universal Id assigned, you could leave the box blank but check the Is Empty radio button. <br> If not sure whether the Universal Id included UPPER or lower case letters, check the Ignore Case box.

.5.1.4.28 Source Reference Id

If you know the EXACT Source Reference Id, enter it with the Equals radio button selected. <br> If you know only part of the Source Reference Id, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> If you are sure that there is no Source Reference Id assigned, you could leave the box blank but check the Is Empty radio button. <br> If not sure whether the Source Reference Id included UPPER or lower case letters, check the Ignore Case box.

.5.1.4.29 Fixed Asset Id (popup search tool)

Use the popup search tool to select the Fixed Asset Id, if known.

.5.1.4.30 Facility Id

Use the popup search tool to select the Facility Id, if known.

.5.1.4.31 Info Url

If you know the EXACT Info Url, enter it with the Equals radio button selected. <br> If you know only part of the Info Url, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> If you are sure that there is no Info Url assigned, you could leave the box blank but check the Is Empty radio button. <br> If not sure whether the Info Url included UPPER or lower case letters, check the Ignore Case box.

.5.1.4.32 Service Loader Name

If you know the EXACT Service Loader Name, enter it with the Equals radio button selected. <br> If you know only part of the Service Loader Name, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> If you are sure that there is no Service Loader Name assigned, you could leave the box blank but check the Is Empty radio button. <br> If not sure whether the Service Loader Name included UPPER or lower case letters, check the Ignore Case box.

.5.1.4.33 Quantity To Produce

If you know the Quantity To Produce, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Quantity To Produce with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.34 Quantity Produced

If you know the Quantity Producef, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Quantity Produced with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.35 Quantity Rejected

If you know the Quantity Rejected, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Quantity Rejected with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.36 Reserv Persons

If you know the number of Reserv Persons, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the number of Reserv Persons with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.37 Reserv2nd P P Perc

If you know the amount of Reserv2nd P P Perc, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the amount of Reserv2nd P P Perc with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.38 Reserv Nth P P Perc

If you know the amount of Reserv Nth P P Perc, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the amount of Reserv Nth P P Perc with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.39 Revision Number

If you know the Revision Number, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the Revision Number with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

.5.1.4.40 Created Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember that this Work Effort was actually Created. <br> -1.) Choose the earliest possible date this could have been using the upper popup calendar. <br> -2.) Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered. <br> -3.) Choose the latest possible date and time the Work Effort could have been Created, using the lower of the two popup calendars. -4.) Select a matching radio button.<P> If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

.5.1.4.41 Created By User Login

If you know the EXACT User Login, enter it with the Equals radio button selected. <br> If you know only part of the User Login, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> As there is always a User Login for the Creation of a Work Effort, you would not want to select the Is Empty radio button. <br> If not sure whether the User Login included UPPER or lower case letters, check the Ignore Case box.

.5.1.4.42 Last Modified Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember that this Work Effort was last Updated. <br> -1.) Choose the earliest possible date this could have been using the upper popup calendar. <br> -2.) Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered. <br> -3.) Choose the latest possible date and time this Work Effort could have Updated, using the lower of the two popup calendars. -4.) Select a matching radio button.<P> If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

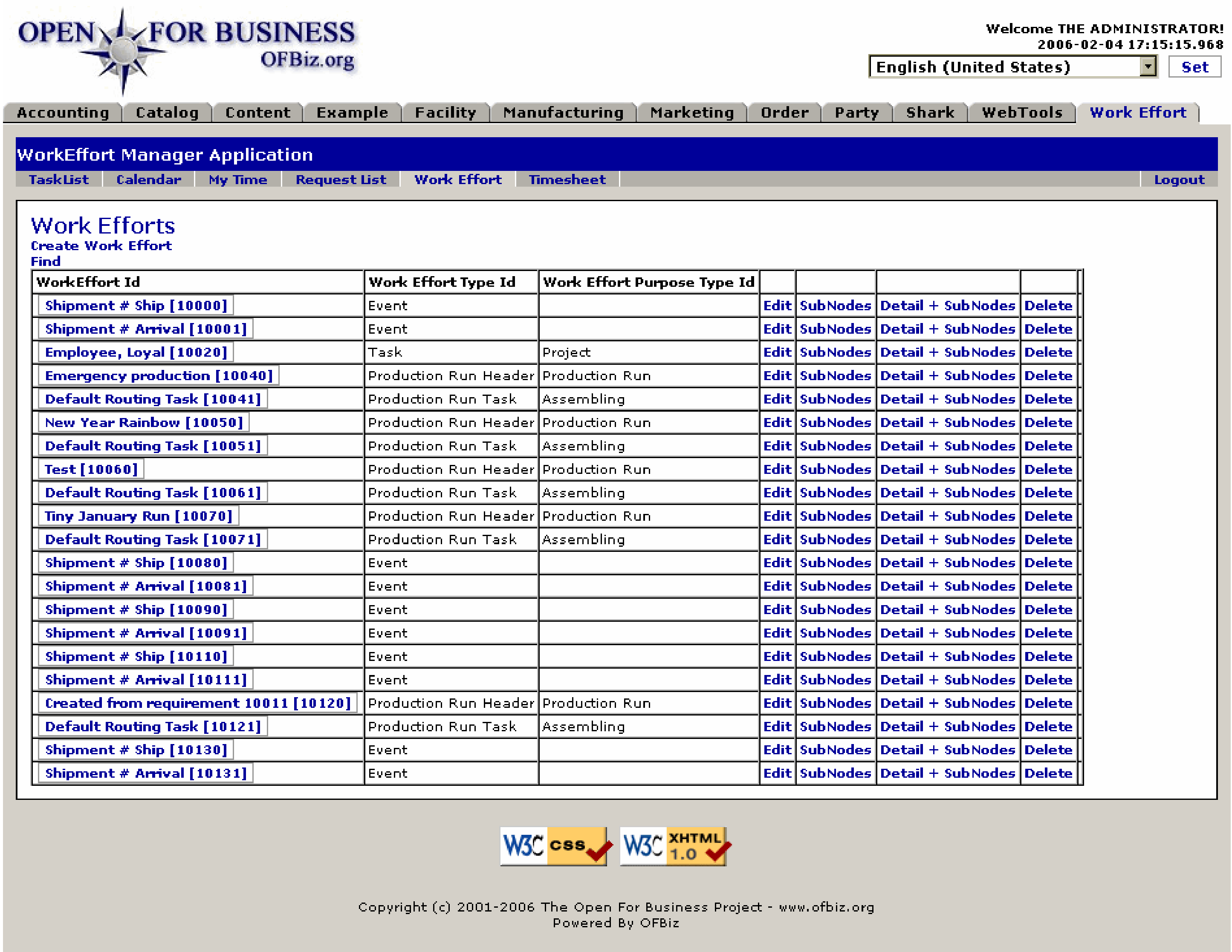
.5.1.4.43 Last Modified By User Login

If you know the EXACT User Login, enter it with the Equals radio button selected. <br> If you know only part of the User Login, enter what you know with either the Begins With or the Contains button selected, as appropriate. <br> If you are sure that there is no Modification, you could leave the box blank but check the Is Empty radio button. <br> If not sure whether the User Login included UPPER or lower case letters, check the Ignore Case box.

.5.2 Work Effort - found

.5.2.1 ListWorkEfforts

id:[DOCWRK1993] image:


OPEN FOR BUSINESS
OFBiz.org
Welcome THE ADMINISTRATOR!
2006-02-04 17:15:15.968
English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
W3C CSS
W3C XHTML 1.0

Work Efforts

Create Work Effort

Find

WorkEffort Id	Work Effort Type Id	Work Effort Purpose Type Id				
Shipment # Ship [10000]	Event		Edit	SubNodes	Detail + SubNodes	Delete
Shipment # Arrival [10001]	Event		Edit	SubNodes	Detail + SubNodes	Delete
Employee, Loyal [10020]	Task	Project	Edit	SubNodes	Detail + SubNodes	Delete
Emergency production [10040]	Production Run Header	Production Run	Edit	SubNodes	Detail + SubNodes	Delete
Default Routing Task [10041]	Production Run Task	Assembling	Edit	SubNodes	Detail + SubNodes	Delete
New Year Rainbow [10050]	Production Run Header	Production Run	Edit	SubNodes	Detail + SubNodes	Delete
Default Routing Task [10051]	Production Run Task	Assembling	Edit	SubNodes	Detail + SubNodes	Delete
Test [10060]	Production Run Header	Production Run	Edit	SubNodes	Detail + SubNodes	Delete
Default Routing Task [10061]	Production Run Task	Assembling	Edit	SubNodes	Detail + SubNodes	Delete
Tiny January Run [10070]	Production Run Header	Production Run	Edit	SubNodes	Detail + SubNodes	Delete
Default Routing Task [10071]	Production Run Task	Assembling	Edit	SubNodes	Detail + SubNodes	Delete
Shipment # Ship [10080]	Event		Edit	SubNodes	Detail + SubNodes	Delete
Shipment # Arrival [10081]	Event		Edit	SubNodes	Detail + SubNodes	Delete
Shipment # Ship [10090]	Event		Edit	SubNodes	Detail + SubNodes	Delete
Shipment # Arrival [10091]	Event		Edit	SubNodes	Detail + SubNodes	Delete
Shipment # Ship [10110]	Event		Edit	SubNodes	Detail + SubNodes	Delete
Shipment # Arrival [10111]	Event		Edit	SubNodes	Detail + SubNodes	Delete
Created from requirement 10011 [10120]	Production Run Header	Production Run	Edit	SubNodes	Detail + SubNodes	Delete
Default Routing Task [10121]	Production Run Task	Assembling	Edit	SubNodes	Detail + SubNodes	Delete
Shipment # Ship [10130]	Event		Edit	SubNodes	Detail + SubNodes	Delete
Shipment # Arrival [10131]	Event		Edit	SubNodes	Detail + SubNodes	Delete

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These are Work Efforts found that were created by Admin. Note the variety of Types.

.5.2.2 link buttons

[Find] [Create Work Effort] [Edit] [SubNodes] [Detail + SubNodes] [Delete]

.5.2.3 Table of existing Work Effort

.5.2.3.1 Work Effort ID

Click on this to bring up the Edit Work Effort screen for this Effort.

.5.2.3.2 Work Effort Type ID

This could be a Routing Task, an Event, a Production Run Header, etc. It is helpful to describe the type of Event.

.5.2.3.3 Work Effort Purpose Type ID

What is the purpose of this work effort?

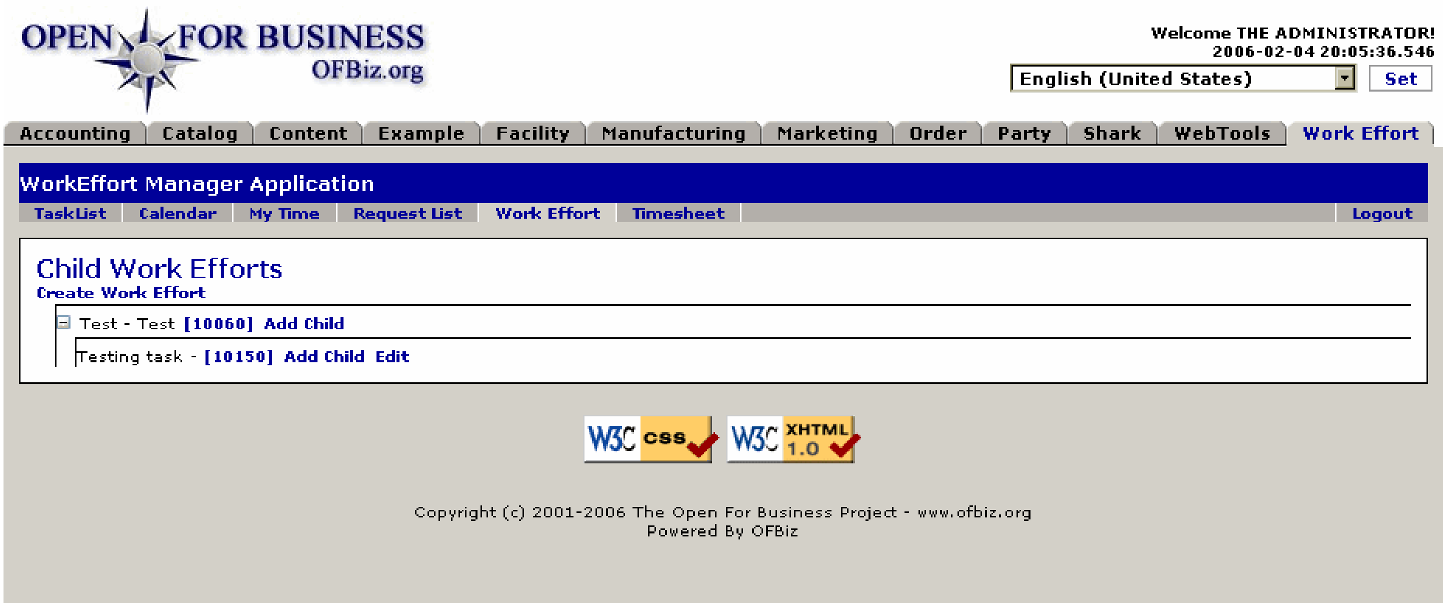
.5.2.3.4 Edit

Whether you click on the [Edit] link associated with the Work Effort or on the Work Effort ID in the first column, you will be taken to the Work Effort > Work Effort screen for working with this item.

.5.2.4 SubNodes Link

.5.2.4.1 ChildWorkEfforts

id:[DOCWRK1972] image:


OPEN FOR BUSINESS
OFBiz.org
Welcome THE ADMINISTRATOR!
2006-02-04 20:05:36.546
English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
W3C CSS
W3C XHTML 1.0

Child Work Efforts

Create Work Effort

⊟ Test - Test [10060] Add Child

Testing task - [10150] Add Child Edit

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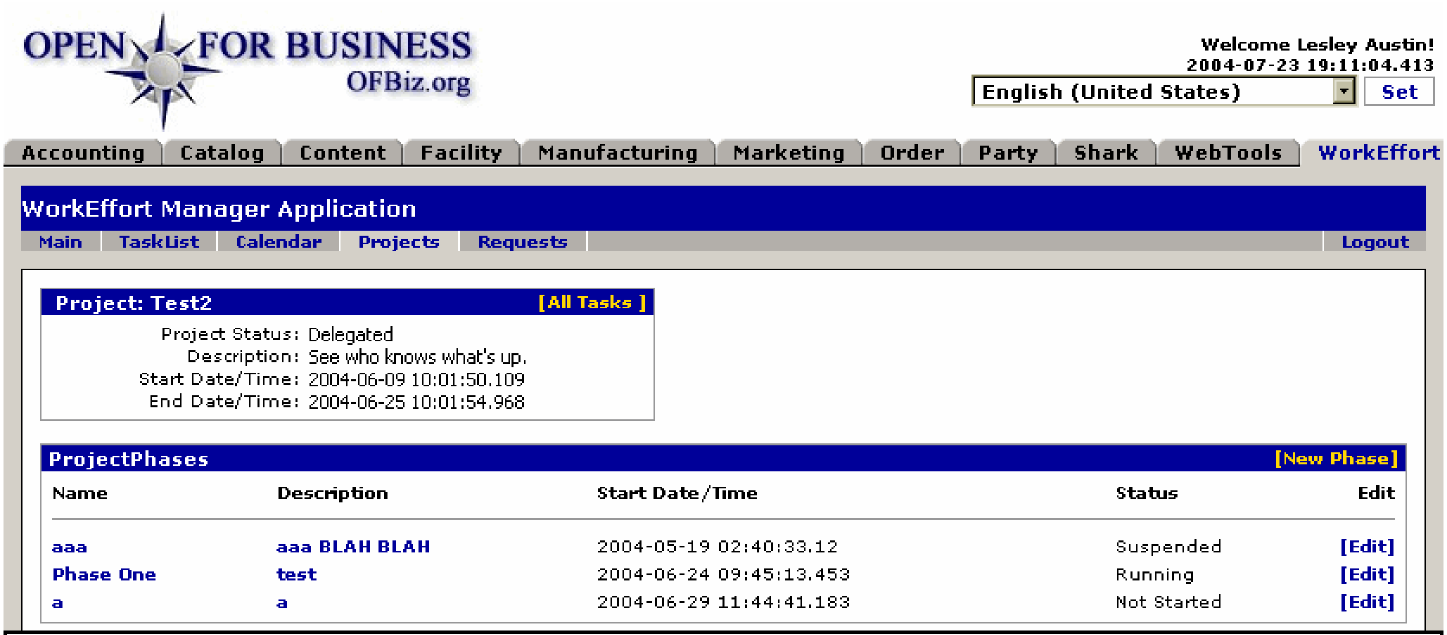
A click on the SubNodes will bring up this view of the subordinate tasks.

.5.2.4.2 link buttons

[Create Work Effort] [Add Child] [Edit]

.5.2.5 Detail + SubNodes link

.5.2.5.1 phaselist


OPEN FOR BUSINESS
OFBiz.org
Welcome Lesley Austin!
2004-07-23 19:11:04.413
English (United States)
Set
Accounting
Catalog
Content
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
WorkEffort
WorkEffort Manager Application
Main
TaskList
Calendar
Projects
Requests
Logout
[All Tasks]
[New Phase]

Project: Test2

Project Status: Delegated
Description: See who knows what's up.
Start Date/Time: 2004-06-09 10:01:50.109
End Date/Time: 2004-06-25 10:01:54.968

ProjectPhases

Name	Description	Start Date/Time	Status	Edit
aaa	aaa BLAH BLAH	2004-05-19 02:40:33.12	Suspended	[Edit]
Phase One	test	2004-06-24 09:45:13.453	Running	[Edit]
a	a	2004-06-29 11:44:41.183	Not Started	[Edit]

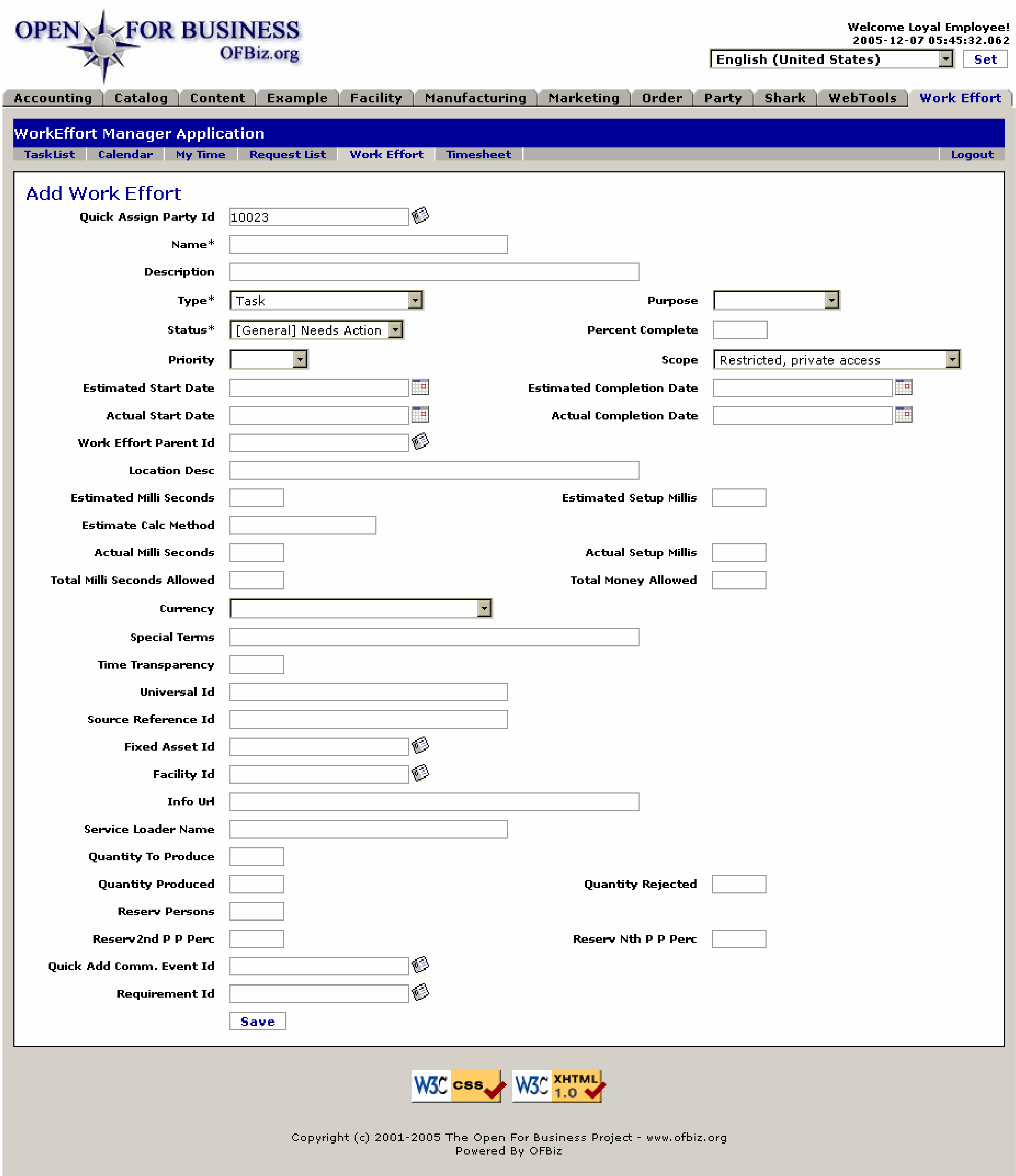
Scheduled Phases for the selected Project are displayed here.

.5.2.5.2 Not Currently Available

The presentation for this link has been changed significantly. When the 'Details + SubNodes' screen again becomes available, an up-to-date graphic will be given here.

.5.3 Add or Create Work Effort

.5.3.1 EditWorkEffort


OPEN FOR BUSINESS
OFBiz.org
Welcome Loyal Employee!
2005-12-07 05:45:32.062
English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Save
W3C CSS
W3C XHTML 1.0
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Add Work Effort

Quick Assign Party Id	10023		
Name*			
Description			
Type*	Task	Purpose	
Status*	[General] Needs Action	Percent Complete	
Priority		Scope	Restricted, private access
Estimated Start Date		Estimated Completion Date	
Actual Start Date		Actual Completion Date	
Work Effort Parent Id			
Location Desc			
Estimated Milli Seconds		Estimated Setup Millis	
Estimate Calc Method			
Actual Milli Seconds		Actual Setup Millis	
Total Milli Seconds Allowed		Total Money Allowed	
Currency			
Special Terms			
Time Transparency			
Universal Id			
Source Reference Id			
Fixed Asset Id			
Facility Id			
Info Url			
Service Loader Name			
Quantity To Produce			
Quantity Produced		Quantity Rejected	
Reserv Persons			
Reserv2nd P P Perc		Reserv Nth P P Perc	
Quick Add Comm. Event Id			
Requirement Id			

New tasks are created in a screen identical to the Edit Task screen. This is a generic screen.

.5.3.2 link buttons

[Save]

.5.3.3 Quick Assign Party ID (popup search tool)

Populates with the Party ID of the one logged in when creating a new Work Effort. Use the popup search tool to select a different PartyID.

.5.3.4 Name *

Each Work Effort needs a descriptive name. This is a Required * field.

.5.3.5 Description

Beyond naming the Work Effort, the description provides more details to distinguish from other, similar Work Efforts.

.5.3.6 Type * (drop-down box)

What Type of a Work Effort is this? Required field. Select from one of the following: <P><B> Available <br> Event <br> Fixed Asset Usage (rental) <br> Production Run Header <br> Production Run Task <br> Program <br> Project <br> Project Phase <br> Routing <br> Routing Task <br> Task <br> Workflow Activity <br> Workflow Process </B>

.5.3.7 Purpose (drop-down box)

What is the purpose for the Work Effort? Leave blank or select from the drop-down box one of the following: <P><B> Assembling <br> Deployment <br> Development <br> Email <br> Maintenance <br> Manufacturing <br> Meeting <br> Phase <br> Phone Call <br> Production Run <br> Project <br> Research <br> Sub-contracting <br> Support </B>

.5.3.8 Status (drop-down box)

Initial status will be one of the following, selected from the drop-down box: <P> <B> (General) Cancelled <br> (General) Decline <br> (General) Delegated <br> (General) Needs Action <br> (General) Sent <br> (Task) Accepted <br> (Task) Completed <br> (Event) Confirmed <br> (Event) Tentative </B>

.5.3.9 Percent Complete

How much of the effort has already been accomplished at the time of this documentation update? Enter the amount of work accomplished as a percent of the total expected for completion.

.5.3.10 Priority (drop-down box)

Enter 1 through 9, with 1 the highest.

.5.3.11 Scope (drop-down box)

Refers to access to the Work Effort and its documentation. Choices from the drop-down box currently include: <B><P> General, public access. <br> Restricted, private access. <br> Very restricted, confidential access.</B>

.5.3.12 Estimated Start Date (popup calendar)

Use the popup calendar or enter the day and time when you expect the Work Effort described to begin.

.5.3.13 Estimated Completion Date (popup calendar)

Use the popup calendar or enter the day and time when you expect the Work Effort described to finish.

.5.3.14 Actual Start Date (popup calendar)

Use the popup calendar or enter the day and time when you actually began the Work Effort described.

.5.3.15 Actual Completion Date (popup calendar)

Use the popup calendar or enter the day and time when you actually finished the Work Effort described.

.5.3.16 Quick Add Comm. Event ID (popup search tool)

Associate communications that may have been instrumental in starting or processing this Work Effort.

.5.3.17 Work Effort Parent ID (popup search tool)

If this Work Effort is a child of another Work Effort, enter that here or use the popup search tool to indentify the Parent.

.5.3.18 Location Desc

Describe the Location where the Work Effort will be accomplished, if necessary.

.5.3.19 Estimated Milli Seconds

How long will it take to accomplish this work effort? This is more appropriate to manufacturing tasks. Figure how many seconds the process will take, then multiply that by 1000 and enter the number here.

.5.3.20 Estimated Setup Millis

How long will it take to setup the equipment and materiel for this work effort? This is more appropriate to manufacturing tasks. Figure how many seconds the setup will take, then multiply that by 1000 and enter the number here.

.5.3.21 Estimate Calc Method

What method was used to Calculate this Estimate?

.5.3.22 Actual Milli Seconds

If the work has already been accomplished, how long did it take to accomplish this work effort? This is more appropriate to manufacturing tasks. Take how many seconds the process actually required, then multiply that by 1000 and enter the number here.

.5.3.23 Actual Setup Millis

If the work has already been accomplished, how long did it take to accomplish the setup? This is more appropriate to manufacturing tasks. Take how many seconds the setup actually required, then multiply that by 1000 and enter the number here.

.5.3.24 Total Milli Seconds Allowed

Besides the setup time and the actual accomplishment time, you may need to allow for getting into position, taking breaks, inspecting the work, etc. Add that time to the estimated setup time and the estimated accomplishment time in seconds, multiply by 1000 and enter the milliseconds here for the total.

.5.3.25 Total Money Allowed

What amount of currency is budgeted for the entire work effort?

.5.3.26 Currency (drop-down box)

Which currency forms the basis of this work effort? Select from the drop-down box.

.5.3.27 Special Terms

Limitations, expectations, anything out of the ordinary which affects the performance of this Work Effort should be identified here.

.5.3.28 Time Transparency

TBD.

.5.3.29 Universal ID

TBD.

.5.3.30 Source Reference ID

If this Work Effort were driven by some other document other than what has already been specified, identify it here.

.5.3.31 Fixed Asset ID (popup search tool)

Locate a Fixed Asset to be assigned to this Work Effort from the popup search tool.

.5.3.32 Facility ID (popup search tool)

Identify and specify the Facility using the popup search tool.

.5.3.33 Info URL

Web-based data sources related to this Work Effort can be identified here.

.5.3.34 Service Loader Name

TBD.

.5.3.35 Quantity To Produce

If this is a production-driven Work Effort, specify the quantity here.

.5.3.36 Quantity Produced

Upon completion, how many were produced.

.5.3.37 Quantity Rejected

Of those produced under this Work Effort, how many had to be rejected?

.5.3.38 Reserv Persons

TBD.

.5.3.39 Reserv2nd P P Perc

TBD.

.5.3.40 Reserv Nth P P Perc

TBD.

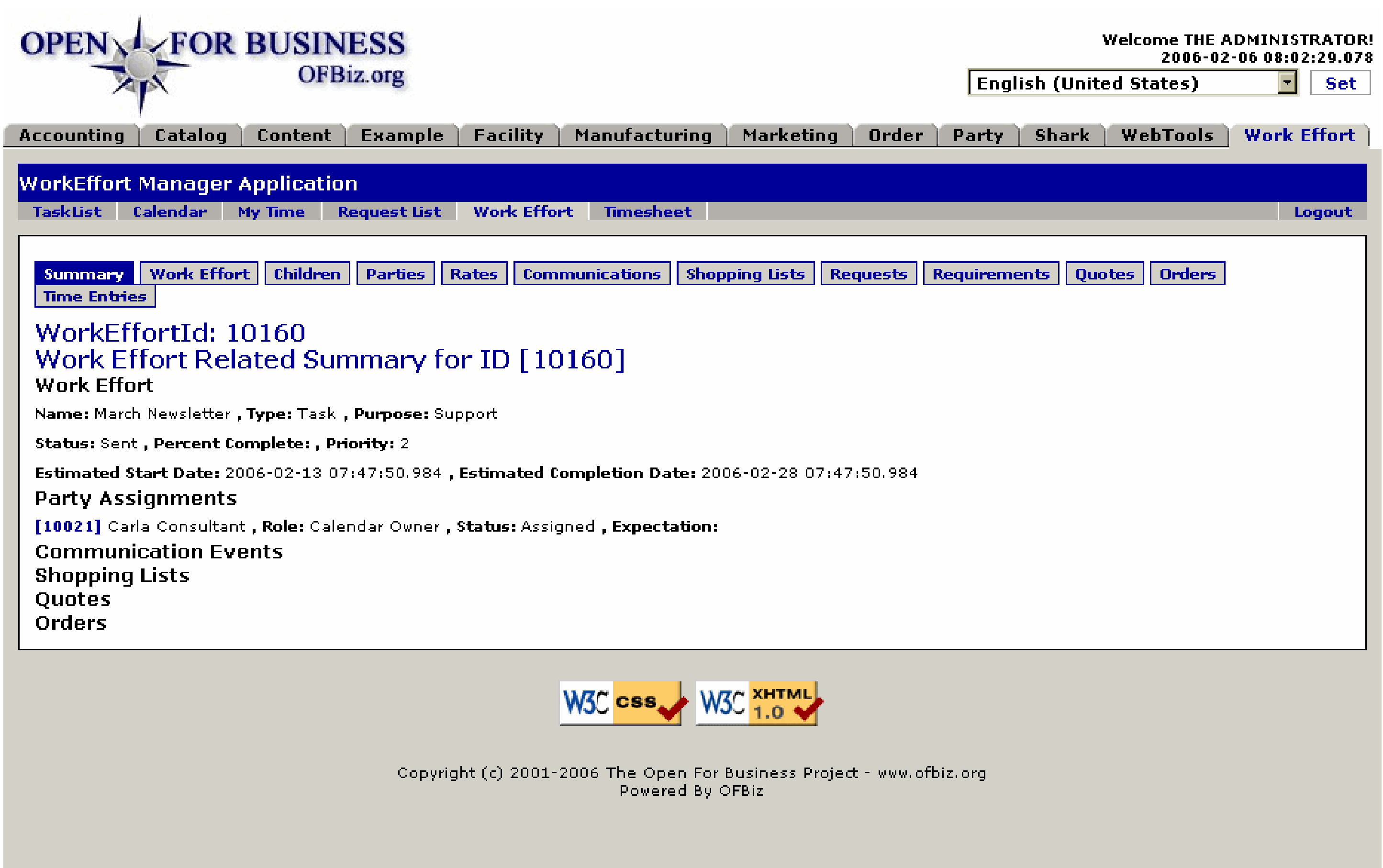
.5.3.41 Requirement ID (popup search tool)

If not already populated, whatever Requirement may have driven this Work Effort can be associated with it here.

.5.4 Edit Work Effort

.5.4.1 Summary

.5.4.1.1 WorkEffortSummary


OPEN FOR BUSINESS
OFBiz.org
Welcome THE ADMINISTRATOR!
2006-02-06 08:02:29.078
English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Summary
Work Effort
Children
Parties
Rates
Communications
Shopping Lists
Requests
Requirements
Quotes
Orders
Time Entries
W3C CSS
W3C XHTML 1.0

WorkEffortId: 10160
Work Effort Related Summary for ID [10160]
Work Effort
Name: March Newsletter , **Type:** Task , **Purpose:** Support
Status: Sent , **Percent Complete:** , **Priority:** 2
Estimated Start Date: 2006-02-13 07:47:50.984 , **Estimated Completion Date:** 2006-02-28 07:47:50.984
Party Assignments
[10021] Carla Consultant , **Role:** Calendar Owner , **Status:** Assigned , **Expectation:**
Communication Events
Shopping Lists
Quotes
Orders

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Summarizes the essential details of the selected Work Effort. The only link besides the sub-tabs is the Party ID.

.5.4.1.2 link buttons

<B> [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries] </B>

.5.4.1.3 Work Effort section

This could report information on the following topics: <P><B> Name: <br> Type: <br> Purpose: <br> Status: <br> Percent Complete: <br> Priority: <br> Estimated Start Date: <br> Estimated Completion Date: </B>

.5.4.1.4 Party Assignments section

This could report on the following topics: <P><B> Party ID: <br> Role: <br> Status: <br> Expectation:</B>

.5.4.1.5 Communication Events section

All related Communication Events are listed including their Event ID and Name.

.5.4.1.6 Shopping Lists

Any related Shopping Lists for the Party or Party Group are listed here. This could include a list of parts or supplies needed from a vendor or from storage to perform a certain assembly process. Don't let the name 'Shopping List' limit what you can do with this useful link.

.5.4.1.7 Quotes

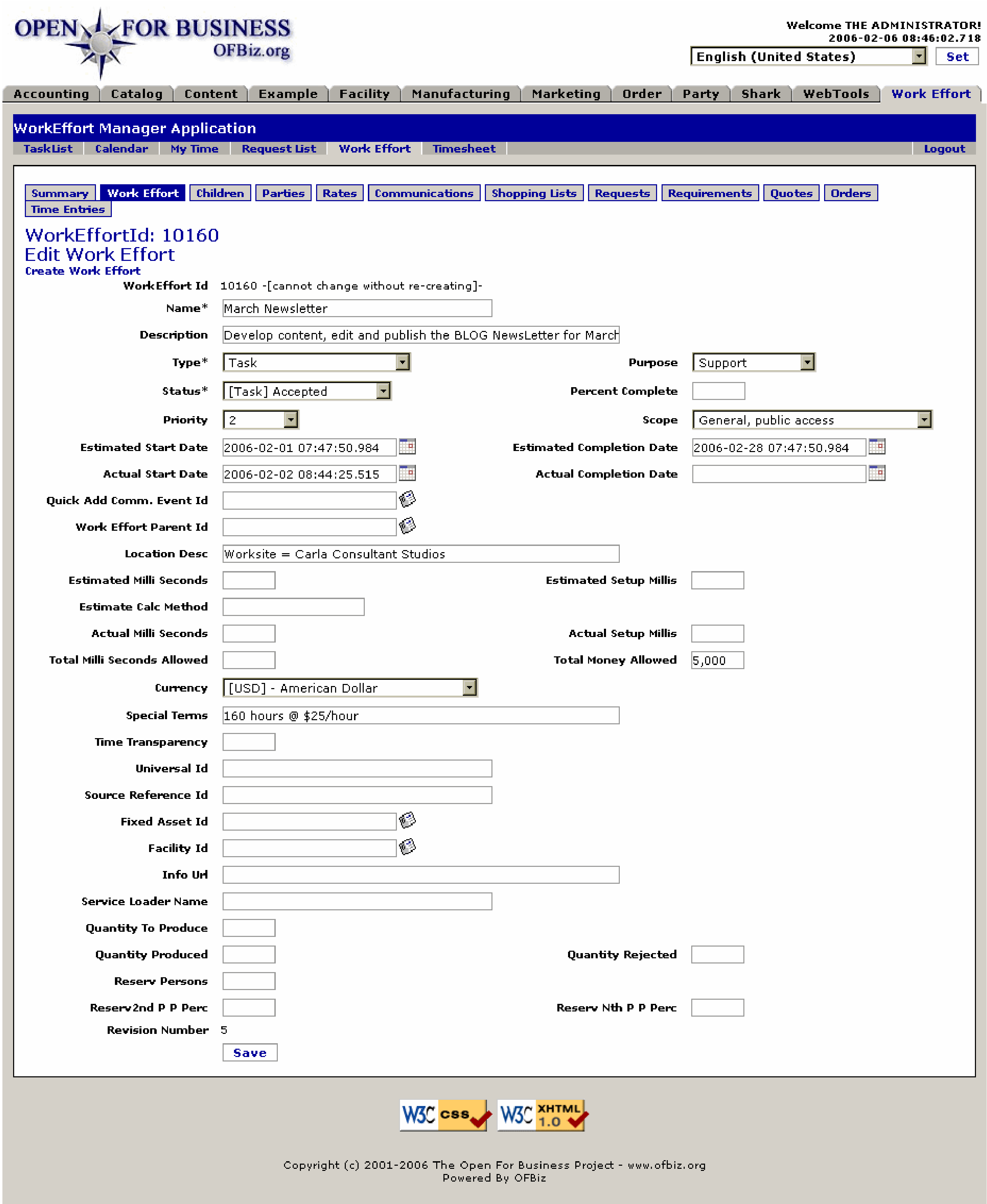
Quotations prepared to support this Work Effort could be listed here.

.5.4.1.8 Orders

If this Work Effort is to support a Sales Order received or if a Purchase Order was made to support the Work Effort, the Order ID with details would be given here.

.5.4.2 Work Effort

.5.4.2.1 editWorkEffort


OPEN FOR BUSINESS
OFBiz.org
Welcome THE ADMINISTRATOR!
2006-02-06 08:46:02.718
English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Summary
Work Effort
Children
Parties
Rates
Communications
Shopping Lists
Requests
Requirements
Quotes
Orders
Time Entries
Save
W3C CSS
W3C XHTML 1.0

WorkEffortId: 10160
Edit Work Effort

Create Work Effort

WorkEffort Id	10160 -[cannot change without re-creating]-		
Name*	March Newsletter		
Description	Develop content, edit and publish the BLOG NewsLetter for March		
Type*	Task	**Purpose**	Support
Status*	[Task] Accepted	**Percent Complete**	
Priority	2	**Scope**	General, public access
Estimated Start Date	2006-02-01 07:47:50.984	**Estimated Completion Date**	2006-02-28 07:47:50.984
Actual Start Date	2006-02-02 08:44:25.515	**Actual Completion Date**	
Quick Add Comm. Event Id			
Work Effort Parent Id			
Location Desc	Worksite = Carla Consultant Studios		
Estimated Milli Seconds		**Estimated Setup Millis**	
Estimate Calc Method			
Actual Milli Seconds		**Actual Setup Millis**	
Total Milli Seconds Allowed		**Total Money Allowed**	5,000
Currency	[USD] - American Dollar		
Special Terms	160 hours @ $25/hour		
Time Transparency			
Universal Id			
Source Reference Id			
Fixed Asset Id			
Facility Id			
Info Url			
Service Loader Name			
Quantity To Produce			
Quantity Produced		**Quantity Rejected**	
Reserv Persons			
Reserv2nd P P Perc		**Reserv Nth P P Perc**	
Revision Number	5		

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Work Effort has been accepted and the actual Start Date entered here in Rev. 5.

.5.4.2.2 link buttons

[Save] [Create Work Effort] <B>[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries] </B>

.5.4.2.3 Discussion

1). The following fields are * Required and must be completed: <br>Name <br> Type <br> Status <P> 2). The fields here were all discussed above under <I>Add or Create Work Effort</I> EXCEPT for those fields given below. <P> 3). Be sure to click on the [Save] link after making any changes you want to keep. <P> 4). Changes made under the other tabs will be reflected in this screen when you return here. You should generally make your changes under those tabs and use this screen primarily to review all the information in one place.

.5.4.2.4 Work Effort ID

This is ID of the item that you are editing. It cannot be changed here. If you wish to work on another Work Effort ID, return to the Find Work Effort screen.

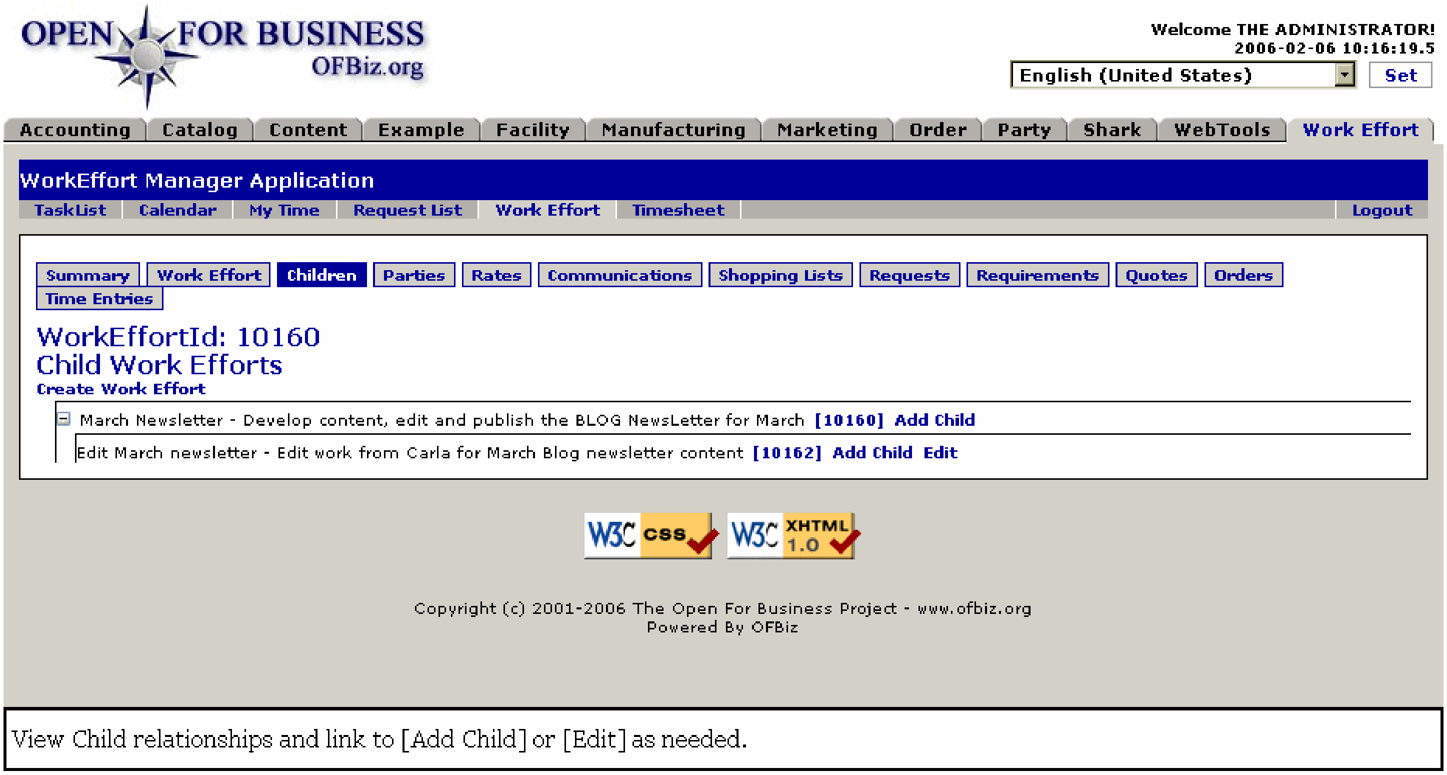
.5.4.2.5 Revision Number

With each change submitted to this Work Effort, the Revision Number will increment. Located as the last item on the screen, this replaces the Requirement ID field found there with the Create Work Effort screen.

.5.4.3 Children

.5.4.3.1 ChildWorkEfforts-2

id:[DOCWRK1955] image:


OPEN FOR BUSINESS
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Welcome THE ADMINISTRATOR!
2006-02-06 10:16:19.5
English (United States)
Set
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Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Summary
Work Effort
Children
Parties
Rates
Communications
Shopping Lists
Requests
Requirements
Quotes
Orders
Time Entries
Create Work Effort
W3C CSS
W3C XHTML 1.0

WorkEffortId: 10160

Child Work Efforts

March Newsletter - Develop content, edit and publish the BLOG NewsLetter for March [10160] Add Child

Edit March newsletter - Edit work from Carla for March Blog newsletter content [10162] Add Child Edit

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View Child relationships and link to [Add Child] or [Edit] as needed.

.5.4.3.2 link buttons

[Add Child] [Create Work Effort] <B>[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries] </B>

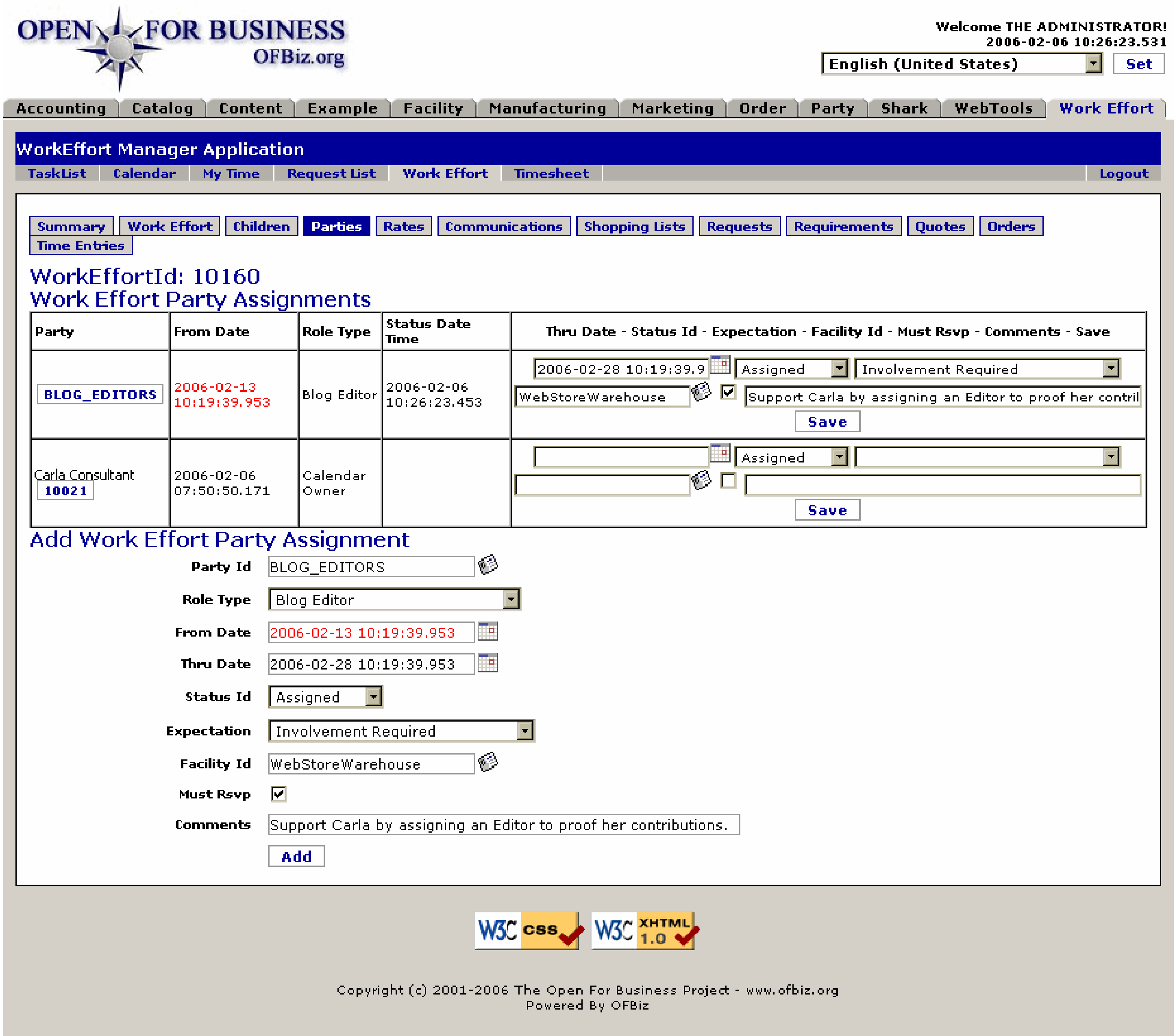
.5.4.3.3 Discussion

Displays the top (selected) event, then shows chilren down as many generations as exist.

.5.4.4 Parties

.5.4.4.1 ListWorkEffortPartyAssigns

id:[13737] image: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Accounting
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Example
Facility
Manufacturing
Marketing
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WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Summary
Work Effort
Children
Parties
Rates
Communications
Shopping Lists
Requests
Requirements
Quotes
Orders
Time Entries
Save
Add
W3C css
W3C XHTML 1.0

Welcome THE ADMINISTRATOR!
2006-02-06 10:26:23.531
English (United States) Set

WorkEffortId: 10160
Work Effort Party Assignments

Party	From Date	Role Type	Status Date Time	Thru Date - Status Id - Expectation - Facility Id - Must Rsvp - Comments - Save
BLOG_EDITORS	2006-02-13 10:19:39.953	Blog Editor	2006-02-06 10:26:23.453	2006-02-28 10:19:39.9 Assigned Involvement Required WebStoreWarehouse ☑ Support Carla by assigning an Editor to proof her contril Save
Carla Consultant 10021	2006-02-06 07:50:50.171	Calendar Owner		Assigned ☐ Save

Add Work Effort Party Assignment

Party Id: BLOG_EDITORS
Role Type: Blog Editor
From Date: 2006-02-13 10:19:39.953
Thru Date: 2006-02-28 10:19:39.953
Status Id: Assigned
Expectation: Involvement Required
Facility Id: WebStoreWarehouse
Must Rsvp: ☑
Comments: Support Carla by assigning an Editor to proof her contributions.

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All Parties assigned to the Work Effort are listed; update in table or add others with the tool.

.5.4.4.2 link buttons

[Save] [Add] <B>[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries] </B>

.5.4.4.3 Table of Work Effort Party Assignments

.5.4.4.3.1 Party

Click on the Party ID to view or edit details under the Party Manager.

.5.4.4.3.2 From Date (and time)

When the Party was assigned to this Work Effort.

.5.4.4.3.3 Role Type

What type of role this Party has with this Work Effort.

.5.4.4.3.4 Status Date Time

When the Status is changed, that is reflected in these fields.

.5.4.4.3.5 Thru Date (popup calendar)

If the assignment is supposed to expire, the date should be given here. Enter here if needed.

.5.4.4.3.6 Status ID (drop-down box)

Status options include: <br><B> --- <br> Assigned <br> Offered <br> Unassigned</B>

.5.4.4.3.7 Expectation (drop-down box)

When a Party assignment is made against a Work Effort ID, there is a level of expectation from that Party by the one making the assignment. The choices available from the drop-down box could include the following: <P><B> For Your Information <br> Immediate Response Requested <br> Involvement Requested <br> Involvement Required </B>

.5.4.4.3.8 Facility ID (popup search tool)

Select the affected Facility from the popup search tool.

.5.4.4.3.9 Must RSVP (check box)

If a reply from the requested Party is required, this box will be checked.

.5.4.4.3.10 Comments

Any other information needed can be found here.

.5.4.4.4 Tool to Add Work Effort Party Assignment

.5.4.4.4.1 Party ID (popup tool)

Select a Party ID from the popup search tool.

.5.4.4.4.2 Role Type (drop-down box)

What type of role does this Party have with this Work Effort? Select from the drop-down box.

.5.4.4.4.3 From Date (popup calendar)

When the Party is assigned a role in the Work Effort. Defaults to Now. Use the popup calendar to insert a different date.

.5.4.4.4.4 Thru Date (popup calendar)

When the assignment will cease or terminate. Do not enter a date unless you wish the assignment to expire at a particular time and date unless this is a historical entry and you are recording the concluding time.

.5.4.4.4.5 Status ID (drop-down box)

Status options include: <br><B> --- <br> Assigned <br> Offered <br> Unassigned</B>

.5.4.4.4.6 Expectation (drop-down box)

When a Party assignment is made against a Work Effort ID, there is a level of expectation from that Party by the one making the assignment. The choices available from the drop-down box could include the following: <P> <B> For Your Information <br> Immediate Response Requested <br> Involvement Requested <br> Involvement

Required </B>

.5.4.4.4.7 Facility ID (popup search tool)

Select the affected Facility from the popup search tool.

.5.4.4.4.8 Must RSVP (check box)

If a reply from the requested Party is required, this box should be checked.

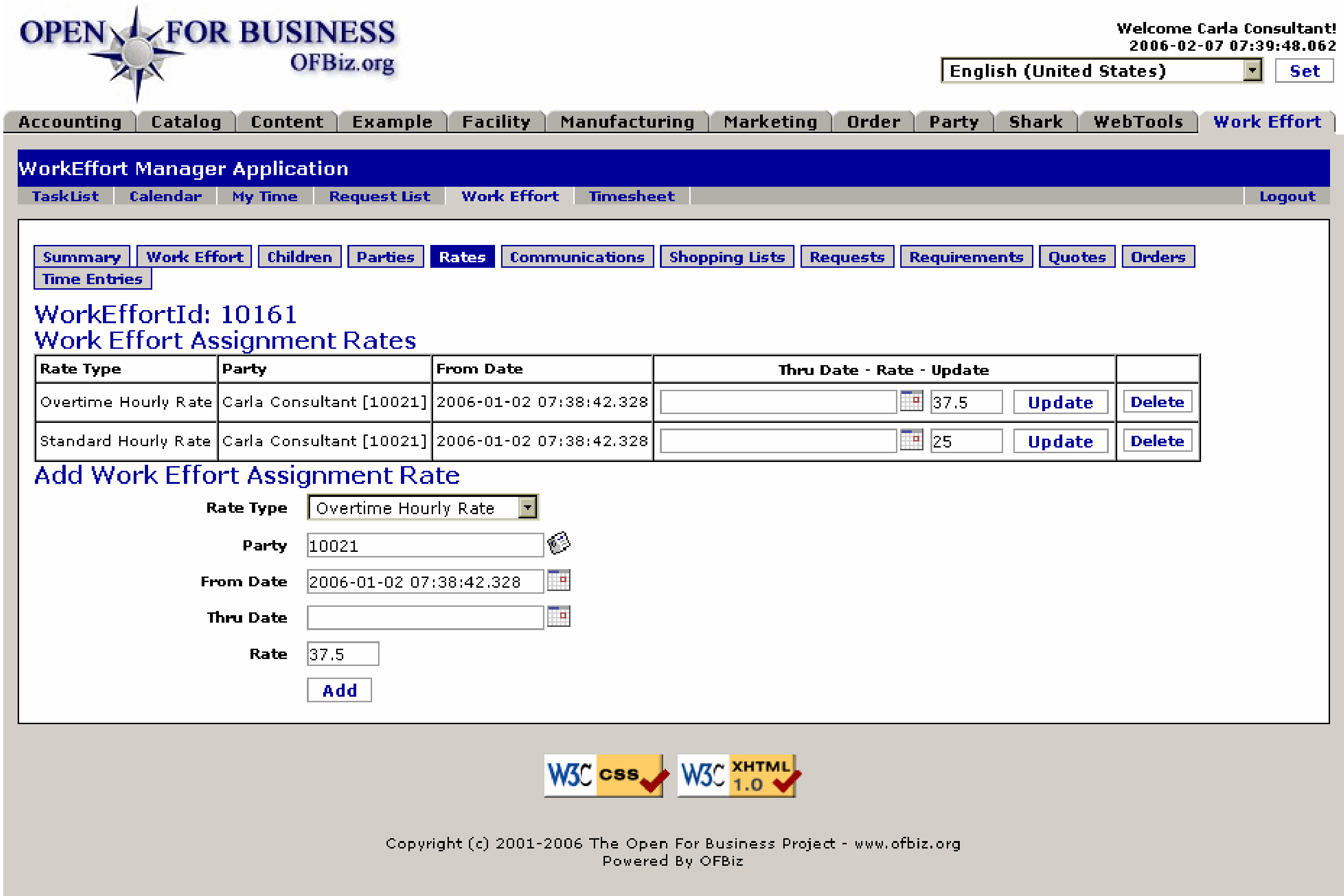
.5.4.4.4.9 Comments

Any other information needed can be added here.

.5.4.5 Rates

.5.4.5.1 EditWorkEffortAssignmentRates

id:[DOCWRK1982] image:


OPEN FOR BUSINESS
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Welcome Carla Consultant!
2006-02-07 07:39:48.062
English (United States)
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Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
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Children
Parties
Rates
Communications
Shopping Lists
Requests
Requirements
Quotes
Orders
Time Entries
Update
Delete
Add
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WorkEffortId: 10161

Work Effort Assignment Rates

Rate Type	Party	From Date	Thru Date - Rate - Update			
Overtime Hourly Rate	Carla Consultant [10021]	2006-01-02 07:38:42.328		37.5	Update	Delete
Standard Hourly Rate	Carla Consultant [10021]	2006-01-02 07:38:42.328		25	Update	Delete

Add Work Effort Assignment Rate

Rate Type	Overtime Hourly Rate
Party	10021
From Date	2006-01-02 07:38:42.328
Thru Date	
Rate	37.5

Rates associated with the Work Effort are listed in the table; add others with the tool. May differ from rates under Party manager.

.5.4.5.2 link buttons

[Update] [Delete] [Add] <B>[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]</B>

.5.4.5.3 Table of Work Effort Assignment Rates

.5.4.5.3.1 Rate Type

Rate types could include the following: <br> <B> Discounted Hourly Rate <br> Overtime Hourly Rate <br> Standard Hourly Rate</B>

.5.4.5.3.2 Party (and Party ID)

The Party whose rates are being applied to this Work Effort.

.5.4.5.3.3 From Date

The Date and Time from which this rate is effective for this Party on this Work Effort.

.5.4.5.3.4 Thru Date (popup calendar)

The Date and time (which can be modified here within the table) after which this Rate assignment is no longer valid.

.5.4.5.3.5 Rate

The amount in currency which represents the Rate for this Party on this Work Effort during the established time period. This amount can be changed within the Table; [Update] to make any changes effective.

.5.4.5.4 Tool to Add Work Effort Assignment Rate

.5.4.5.4.1 Rate Type (drop-down box)

Rate types could include the following: <br> <B> Discounted Hourly Rate <br> Overtime Hourly Rate <br> Standard Hourly Rate</B>

.5.4.5.4.2 Party (popup search tool)

Use the popup search to identify the Party being assigned the Rate for this Work Effort.

.5.4.5.4.3 From Date (popup calendar)

Defaults to Now. Enter a different date using the popup calendar. This is the date at which the rate will be effective for this Party on this Work Effort only.

.5.4.5.4.4 Thru Date (popup calendar)

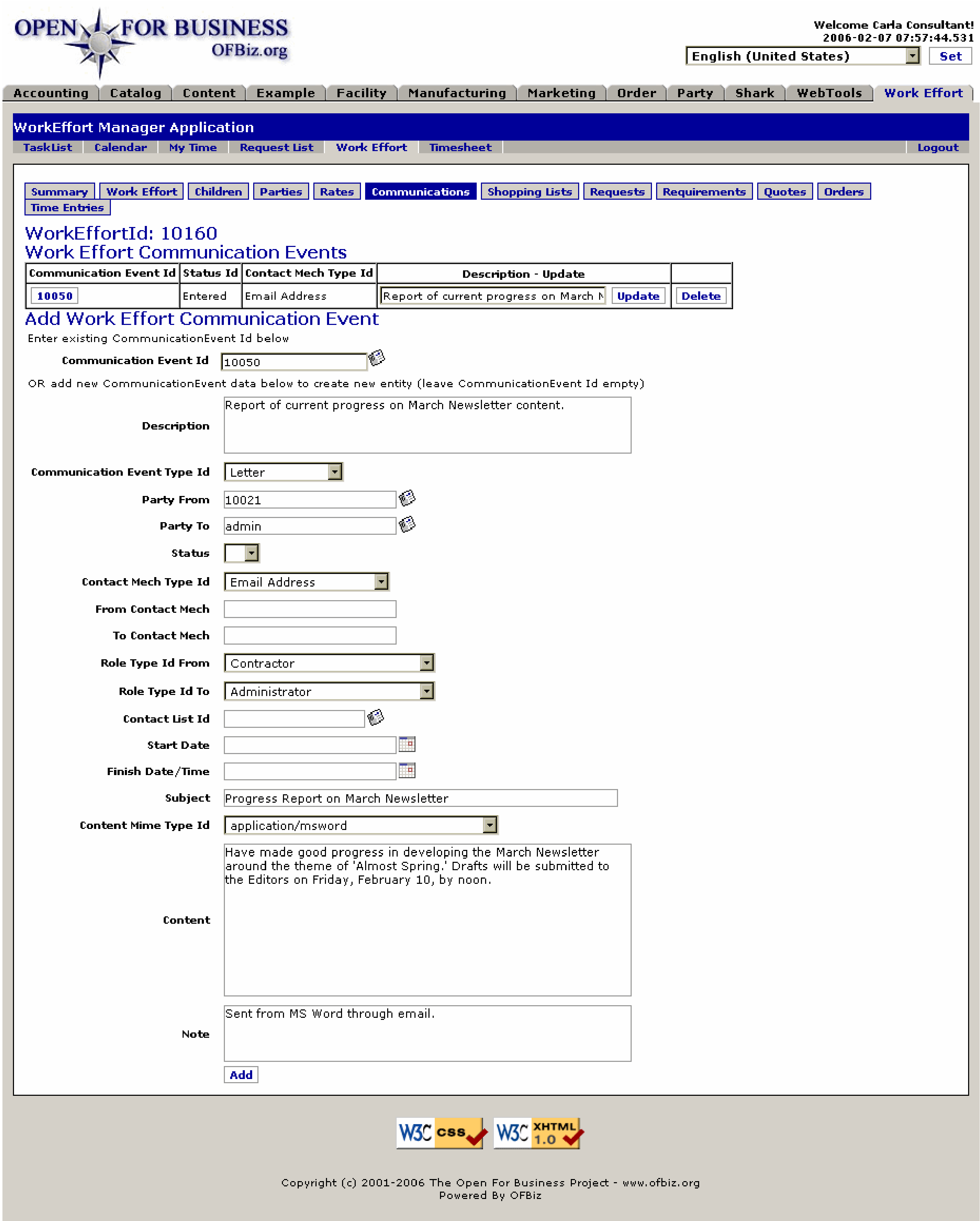
The Date and time (which can be modified later within the table) after which this Rate assignment is no longer valid.

.5.4.5.4.5 Rate

Enter the amount (including decimals but without currency symbols) which will be the Rate for this Rate Type on this Work Effort by this Party. Currency type is set in the basic Edit Work Effort screen.

.5.4.6 Communications

.5.4.6.1 ListWorkEffortCommEvents


OPEN FOR BUSINESS
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Welcome Carla Consultant!
2006-02-07 07:57:44.531
English (United States)
Set
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Facility
Manufacturing
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Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Summary
Work Effort
Children
Parties
Rates
Communications
Shopping Lists
Requests
Requirements
Quotes
Orders
Time Entries

WorkEffortId: 10160

Work Effort Communication Events

Communication Event Id	Status Id	Contact Mech Type Id	Description - Update	
10050	Entered	Email Address	Report of current progress on March N Update	Delete

Add Work Effort Communication Event

Enter existing CommunicationEvent Id below

Communication Event Id 10050

OR add new CommunicationEvent data below to create new entity (leave CommunicationEvent Id empty)

Description Report of current progress on March Newsletter content.

Communication Event Type Id Letter

Party From 10021

Party To admin

Status

Contact Mech Type Id Email Address

From Contact Mech

To Contact Mech

Role Type Id From Contractor

Role Type Id To Administrator

Contact List Id

Start Date

Finish Date/Time

Subject Progress Report on March Newsletter

Content Mime Type Id application/msword

Content Have made good progress in developing the March Newsletter around the theme of 'Almost Spring.' Drafts will be submitted to the Editors on Friday, February 10, by noon.

Note Sent from MS Word through email.

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This screen both reports previous communications and provides Communication tools.

.5.4.6.2 link buttons

[Update] [Delete] [Add] <B>[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries] </B>

.5.4.6.3 Table of Work Effort Communication Events

.5.4.6.3.1 Communication Event ID

Click on the ID to view or edit the Communication under the Party Manager > Comm tab > CommEvent sub tab.

.5.4.6.3.2 Status ID

Current status of the Communication Event. Go to the Party Manager > Comm Tab with this Communication to change the Status.

.5.4.6.3.3 Contact Mech Type ID

What method of communication was use.

.5.4.6.3.4 Description

What the Communication is about. This can be changed here in the table; [Update] when the change is made.

.5.4.6.4 Tool to Add Work Effort Communication Event

.5.4.6.4.1 Communication Event ID (popup search tool)

Either enter the ID of an existing Communication Event here (use the popup search tool to find it), or create a new Communication in the fields following this one.

.5.4.6.4.2 Description

Describe the Communication as it relates to the Work Effort. <P> NOTE: Do NOT enter a Communication Event ID in the field above if you are using this screen to create a new Communication Event.

.5.4.6.4.3 Communication Event Type ID (drop-down box)

Types of Communication Events could include: <P><B> Comment/Note <br> Email <br> Face-To-Face <br> Fax <br> Letter <br> Phone <br> Web Site</B>

.5.4.6.4.4 Party From (popup search tool)

The originating Party. If this is a reply, it will be the Party making the Reply. Use the popup search tool to identify the Party, or enter the ID directly.

.5.4.6.4.5 Party To (popup search tool)

The Party to whom the communication is being sent. Use the popup search tool to identify the Party, or enter the ID directly.

.5.4.6.4.6 Status (drop-down box)

What stage in the communications cycle is this Comm Event at? For example, 'COM_ENTERED' would indicate that it has been started but not yet acknowledged, answered, or acted upon.

.5.4.6.4.7 Contact Mech Type ID (drop-down box)

What contact mechanism will be used? Note that any Contact Mechanism can only be used if it is already established for the Party. Select from among the following: <P> <B> Electronic Address <br> Email Address <br> Internet Domain Name <br> Internet IP Address <br> Phone Number <br> Postal Address <br> Web URL/Address</B>

.5.4.6.4.8 From Contact Mech

This would be the phone number, email address, or whatever the selected Mechanism might be for the sending Party.

.5.4.6.4.9 To Contact Mech

This would be the phone number, email address, or whatever the selected Mechanism might be for the receiving Party.

.5.4.6.4.10 Role Type Id From (drop-down box)

What was the Role of the Party originating the Communication? Select from among the potential roles shown in the drop-down box.

.5.4.6.4.11 Role Type Id To (drop-down box)

What was the Role of the Party receiving the Communication? Select from among the potential roles shown in the drop-down box.

.5.4.6.4.12 Contact List Id (popup search tool)

If there is a related Contact List to which the Communication is being dispatched, identify it here from the popup search tool.

.5.4.6.4.13 Start Date (popup calendar)

Defaults to Now.

.5.4.6.4.14 Finish Date/Time (popup calendar)

Probably the date and time after which the terms of the Communication would no longer be effective.

.5.4.6.4.15 Subject

What the Communication is about.

.5.4.6.4.16 Mime Type Id (drop-down box)

What type of format is used in the Communication? Mime Types selected from the drop-down box could include one of the following: <P><B> application </B>- msword, pdf, zip, etc. <B><br> audio </B>- basic, mpeg, etc. <B><br> image </B>- gif, jpeg, tiff, etc. <B><br> message </B>- http, news, s-http, etc. <B><br> model </B>- mesh, vrml, etc. <B><br> multipart </B>- digest, encrypted, signed, etc. <B><br> text </B>- html, rtf, tab-separated-values, etc. <B><br> video </B>- mpeg, quicktime, etc.

.5.4.6.4.17 Content

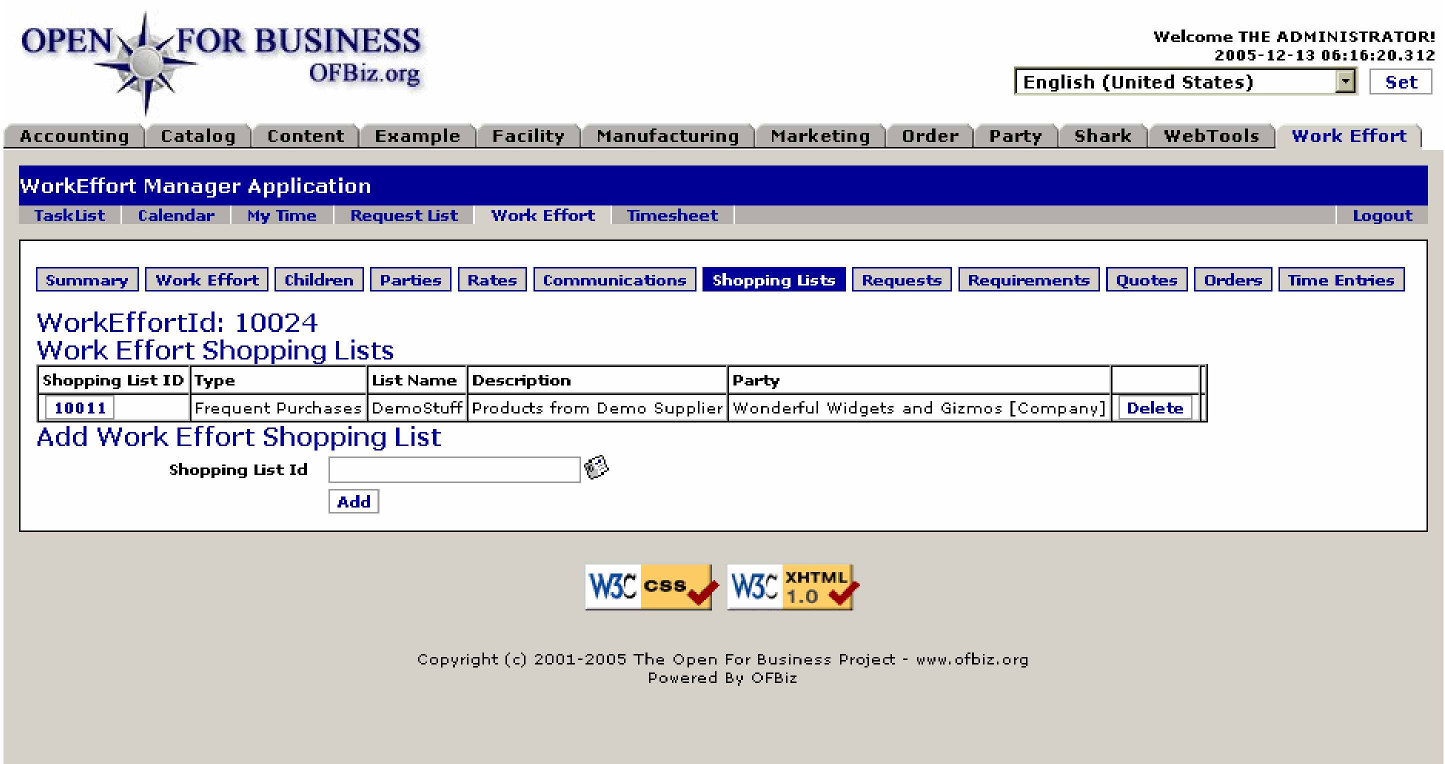
What the Communication is trying to say or convey. This is the heart of the Communication.

.5.4.6.4.18 Note

Information about the Communication Event, NOT the actual content of the Communication.

.5.4.7 Shopping Lists

.5.4.7.1 ListWorkEffortShopLists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Rates
Communications
Shopping Lists
Requests
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Time Entries
Add
W3C CSS
W3C XHTML 1.0

Welcome THE ADMINISTRATOR!
2005-12-13 06:16:20.312

WorkEffortId: 10024

Work Effort Shopping Lists

Shopping List ID	Type	List Name	Description	Party	
10011	Frequent Purchases	DemoStuff	Products from Demo Supplier	Wonderful Widgets and Gizmos [Company]	Delete

Add Work Effort Shopping List

Shopping List Id

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Shopping Lists associated with a Work Effort are listed here.

.5.4.7.2 link buttons

[Delete] [Add] <B>[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]</B>

.5.4.7.3 Table of Work Effort Shopping Lists

.5.4.7.3.1 Shopping List ID

Click on this to edit the Shopping List under the Party Manager.

.5.4.7.3.2 Type

What Type of shopping list this is: 'Wish List,' 'Frequent Purchases,' etc.

.5.4.7.3.3 ListName

What the List is called.

.5.4.7.3.4 Description

Tells you more about the List.

.5.4.7.3.5 Party

Name of the Party that 'Owns' the List.

.5.4.7.4 Tool to Add Work Effort Shopping List

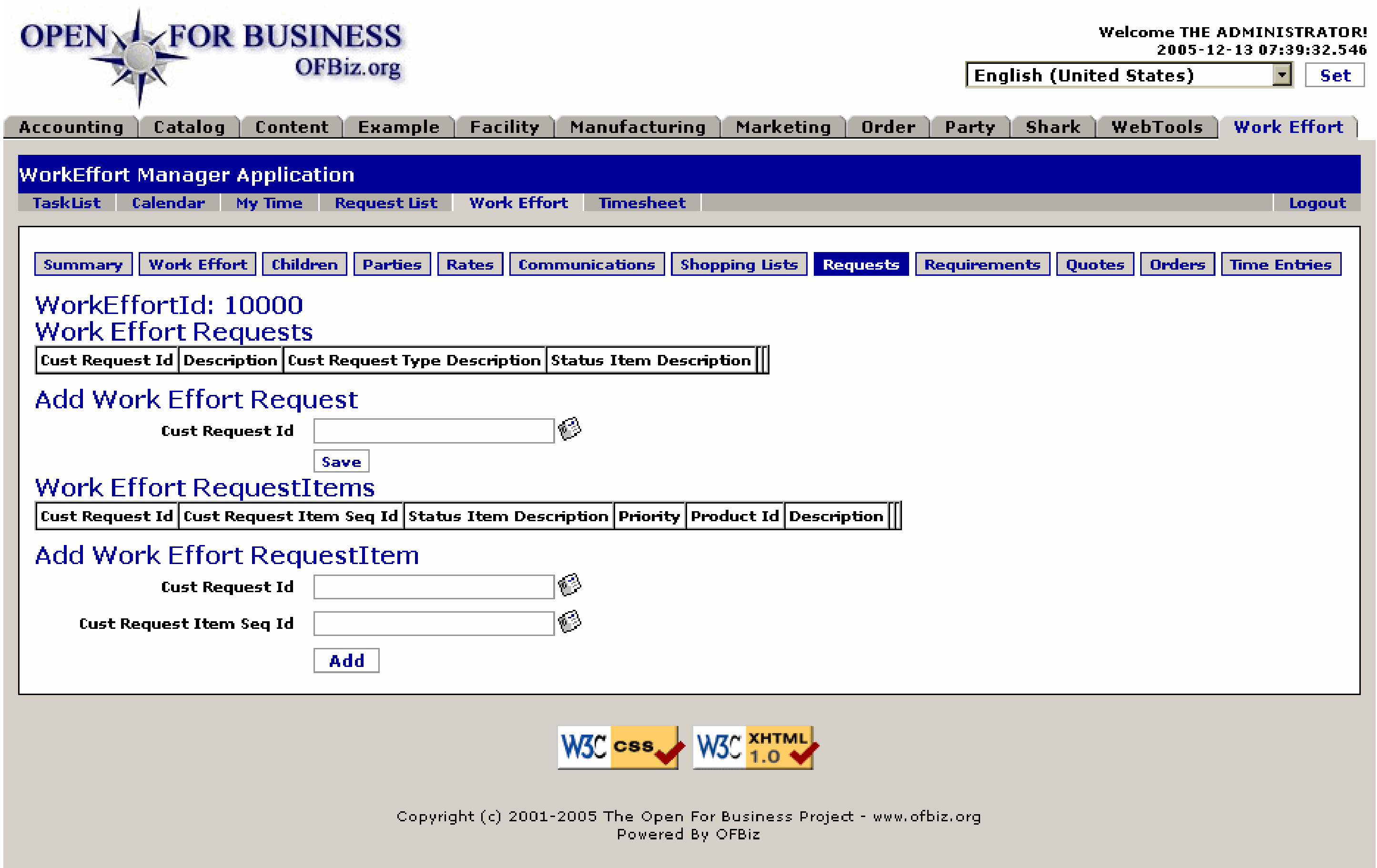
.5.4.7.4.1 Shopping List ID (popup search tool)

Enter the ID of the list and press [Add]. Use the popup search tool to locate the ID.

.5.4.8 Requests

.5.4.8.1 ListWorkEffortRequests

id:[DOCWRK1953] image: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Welcome THE ADMINISTRATOR!
2005-12-13 07:39:32.546
English (United States)
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WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
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Parties
Rates
Communications
Shopping Lists
Requests
Requirements
Quotes
Orders
Time Entries
Save
Add
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WorkEffortId: 10000

Work Effort Requests

Cust Request Id	Description	Cust Request Type Description	Status Item Description

Add Work Effort Request

Cust Request Id

Work Effort RequestItems

Cust Request Id	Cust Request Item Seq Id	Status Item Description	Priority	Product Id	Description

Add Work Effort RequestItem

Cust Request Id

Cust Request Item Seq Id

Requests related to the current Work Effort are listed or can be added here.

.5.4.8.2 link buttons

[Save] [Delete] [Add] <B>[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]</B>

.5.4.8.3 Table of Work Effort Requests

.5.4.8.3.1 Cust Request ID

Number assigned when the Customer Request was entered into the system. Click on this number to view or edit.

.5.4.8.3.2 Description

The descriptive title of the Request.

.5.4.8.3.3 Cust Request Type Description

What Type of Request this is.

.5.4.8.3.4 Status Item Description

What is the Status of this Request? Entered, Approved, Processed, etc.

.5.4.8.4 Tool to Add Work Effort Request

.5.4.8.4.1 Cust Request ID (popup search tool)

Enter the Customer Request ID number then press [Save] to add it to the Work Effort.

.5.4.8.5 Table of Work Effort Request Items

.5.4.8.5.1 Cust Request ID

Number assigned when the Customer Request was entered into the system. Click on this number to view or edit.

.5.4.8.5.2 Cust Request Item Seq ID

Within the Customer Request, there is likely a list of items needing attention. This Seq ID specifies which Item is being added to the Work Effort.

.5.4.8.5.3 Status Item Description

What is the Status of this Item in processing the Request?

.5.4.8.5.4 Priority

WHere does this effort rate in relation to other efforts? The Priority helps to allocate resources based upon relative importance.

.5.4.8.5.5 Product ID

Which Product is the subject of this Request Item? The Product ID is given here.

.5.4.8.5.6 Description

Which Product is the subject of this Request Item? The Product Description is given here.

.5.4.8.6 Tool to Add Work Effort Request Item

.5.4.8.6.1 Cust Request ID (popup search tool)

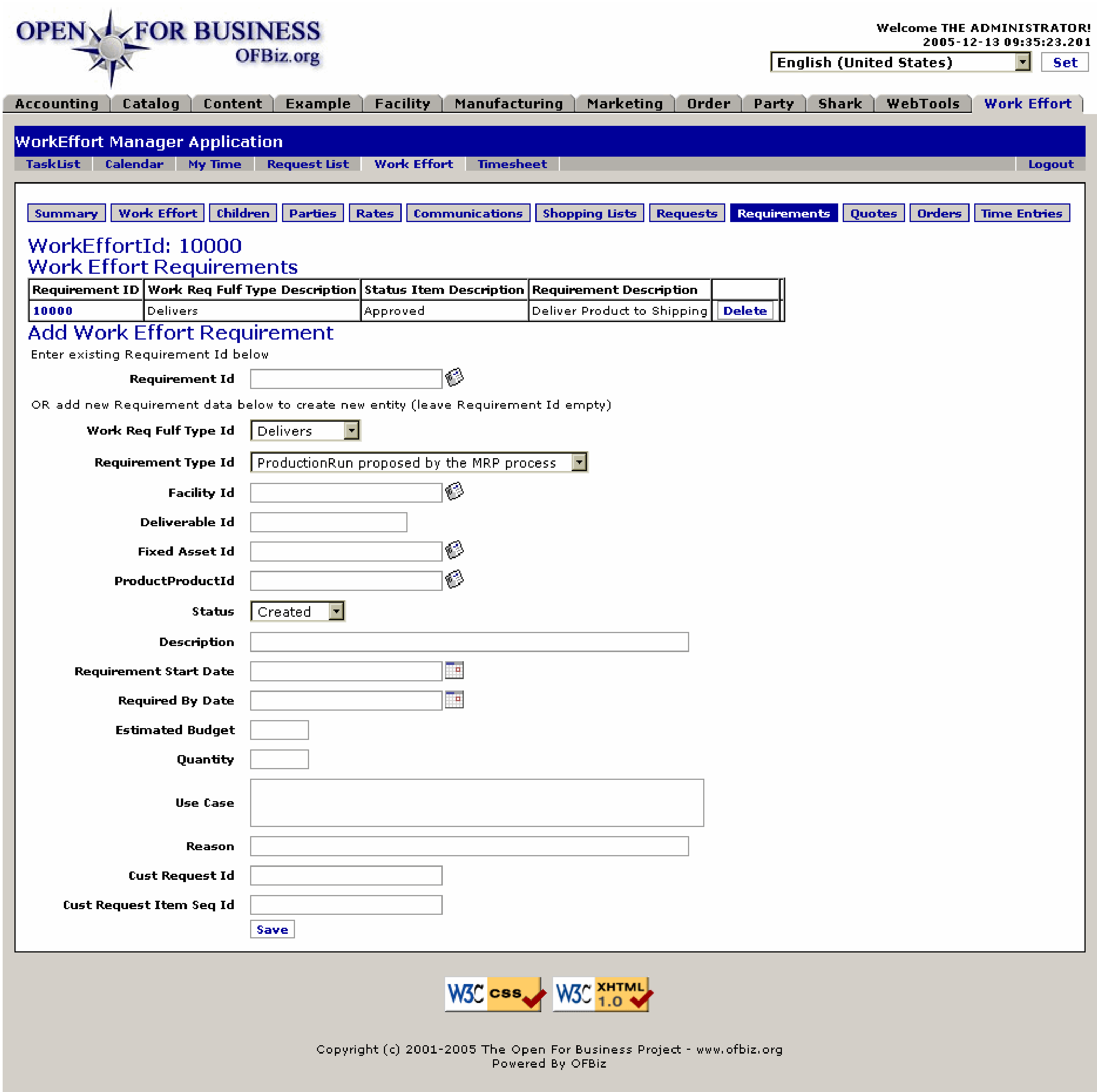
Specify the Request you wish to add to the Work Effort; use the popup search tool to identify the Request.

.5.4.8.6.2 Cust Request Item Seq ID

Specify the Request Item Sequence item you wish to add to the Work Effort; use the popup search tool to identify the Item.

.5.4.9 Requirements

.5.4.9.1 ListWorkEffortRequirements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English (United States)
Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
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Children
Parties
Rates
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Requests
Requirements
Quotes
Orders
Time Entries
Save
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WorkEffortId: 10000

Work Effort Requirements

Requirement ID	Work Req Fulf Type Description	Status Item Description	Requirement Description	
10000	Delivers	Approved	Deliver Product to Shipping	Delete

Add Work Effort Requirement

Enter existing Requirement Id below

Requirement Id

OR add new Requirement data below to create new entity (leave Requirement Id empty)

Work Req Fulf Type Id	Delivers
Requirement Type Id	ProductionRun proposed by the MRP process
Facility Id	
Deliverable Id	
Fixed Asset Id	
ProductProductId	
Status	Created
Description	
Requirement Start Date	
Required By Date	
Estimated Budget	
Quantity	
Use Case	
Reason	
Cust Request Id	
Cust Request Item Seq Id	

Work Effort Requirements are listed in the table and added with the tool shown here or under Order Manager - Requirements.

.5.4.9.2 link buttons

[Save] [Delete] <B> [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries] </B>

.5.4.9.3 Table of Work Effort Requirements

.5.4.9.3.1 Requirement ID

Click on this number to view or edit the Requirement.

.5.4.9.3.2 Work Req Fulf Type Description

Fulfillment of this Requirement will accomplish one of the following purposes: <br> Delivers <br> Deploys <br> Fixes <br> Implements <br> Tests

.5.4.9.3.3 Status Item Description

Describes the Status towards accomplishing this Requirement.

.5.4.9.3.4 Requirement Description

Describes what the Requirement is or does.

.5.4.9.4 Tool to Add Work Effort Requirements

.5.4.9.4.1 Requirement ID (popup search tool)

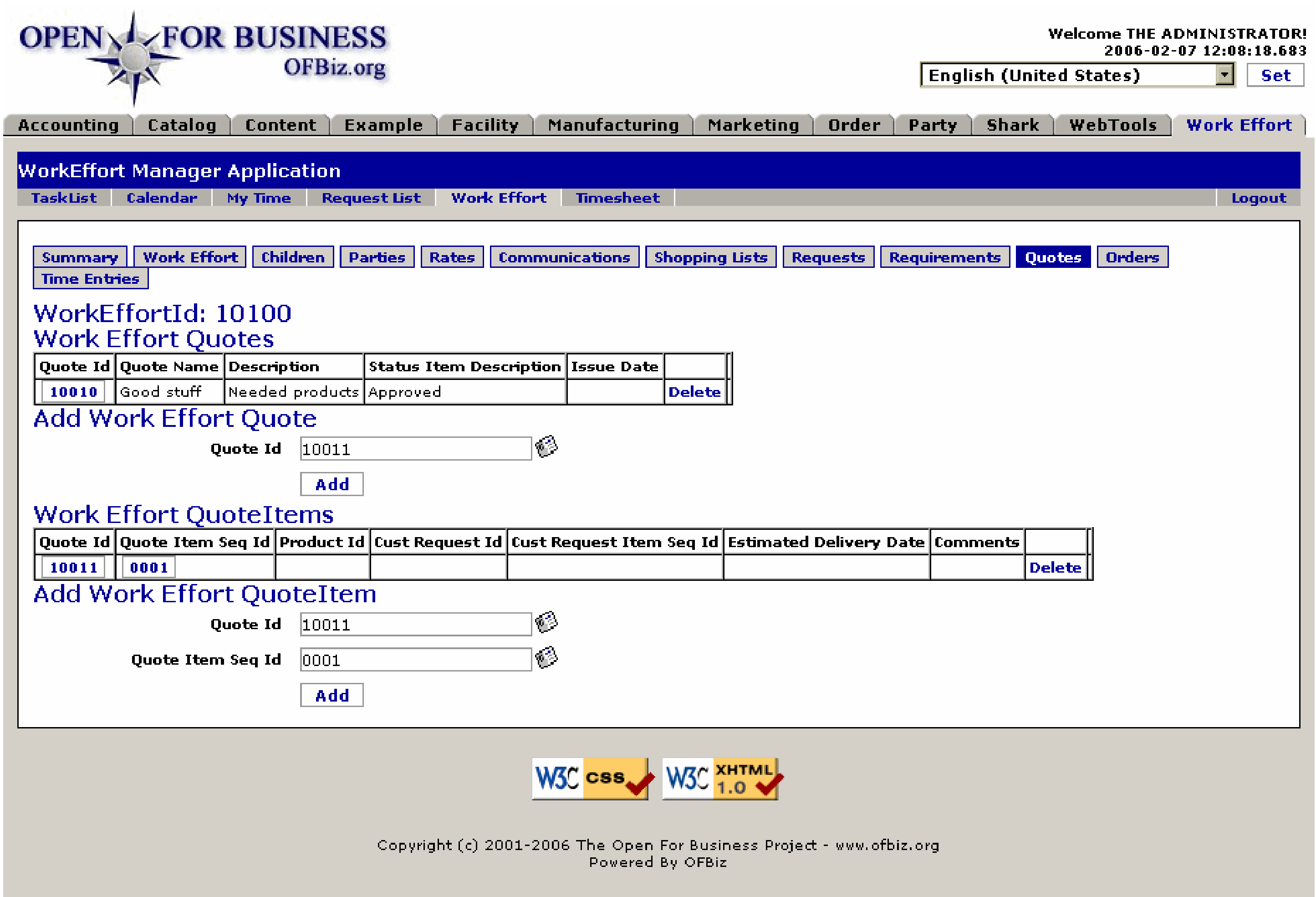
Use the popup search tool to identify an existing Requirement to being into this Work Effort, then click on [Save] at the bottom of the screen.

.5.4.9.4.2 Discussion

Except for <I>Work Req Fulf Type ID</I>, the remaining fields are each discussed under the Order Manager > Requirements tab. Please see that documentation for details. <P> <B>Work Req Fulf Type Description </B> (drop-down box) <br> Fulfillment of this Requirement will accomplish one of the following purposes: <B><br> Delivers <br> Deploys <br> Fixes <br> Implements <br> Tests </B>

.5.4.10 Quotes

.5.4.10.1 ListWorkEffortQuotes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Set
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Marketing
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Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Summary
Work Effort
Children
Parties
Rates
Communications
Shopping Lists
Requests
Requirements
Quotes
Orders
Time Entries
W3C CSS
W3C XHTML 1.0

WorkEffortId: 10100

Work Effort Quotes

Quote Id	Quote Name	Description	Status Item Description	Issue Date	
10010	Good stuff	Needed products	Approved		Delete

Add Work Effort Quote

Quote Id 10011

Add

Work Effort QuoteItems

Quote Id	Quote Item Seq Id	Product Id	Cust Request Id	Cust Request Item Seq Id	Estimated Delivery Date	Comments	
10011	0001						Delete

Add Work Effort QuoteItem

Quote Id 10011

Quote Item Seq Id 0001

Add

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Quotes and Quote Items associated with the Work Effort are displayed and added from this screen.

.5.4.10.2 link buttons

[Delete] [Add] <B>[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries] </B>

.5.4.10.3 Table of Work Effort Quotes

.5.4.10.3.1 Quote ID

The number assigned to identify this Quote at the time of its creation. Click on the ID to view or edit details.

.5.4.10.3.2 Quote Name

What the Quote is called.

.5.4.10.3.3 Description

Descriptive words about the quotation to differentiate it from other, similar quotes.

.5.4.10.3.4 Status Item Description

Actually the Status of this Quote throught the processes.

.5.4.10.3.5 Issue Date

The date when the Quote was issued.

.5.4.10.4 Tool to Add Work Effort Quote

.5.4.10.4.1 Quote ID (popup search tool)

Enter the Quote ID then click on [Add] to include an existing Quote with this Work Effort.

.5.4.10.5 Table of Work Effort Quote Items

.5.4.10.5.1 Quote ID

Click on this ID number to view or edit the Quote.

.5.4.10.5.2 Quote Item Seq ID

Which Sequence Item within the Quotation has been added to this Work Effort.

.5.4.10.5.3 Product ID

Which Product is listed in the Quotation Item.

.5.4.10.5.4 Cust Request ID

Any associated Customer Request is given here.

.5.4.10.5.5 Cust Request Item Seq Id

The related Customer Request Item Sequence ID number is given here.

.5.4.10.5.6 Estimated Delivery Date

Any date provided for the estimated delivery is given here.

.5.4.10.5.7 Comments

Comments included with the Quote Item is given here.

.5.4.10.6 Tool to Add Work Effort Quote Items

.5.4.10.6.1 Quote ID (popup search tool)

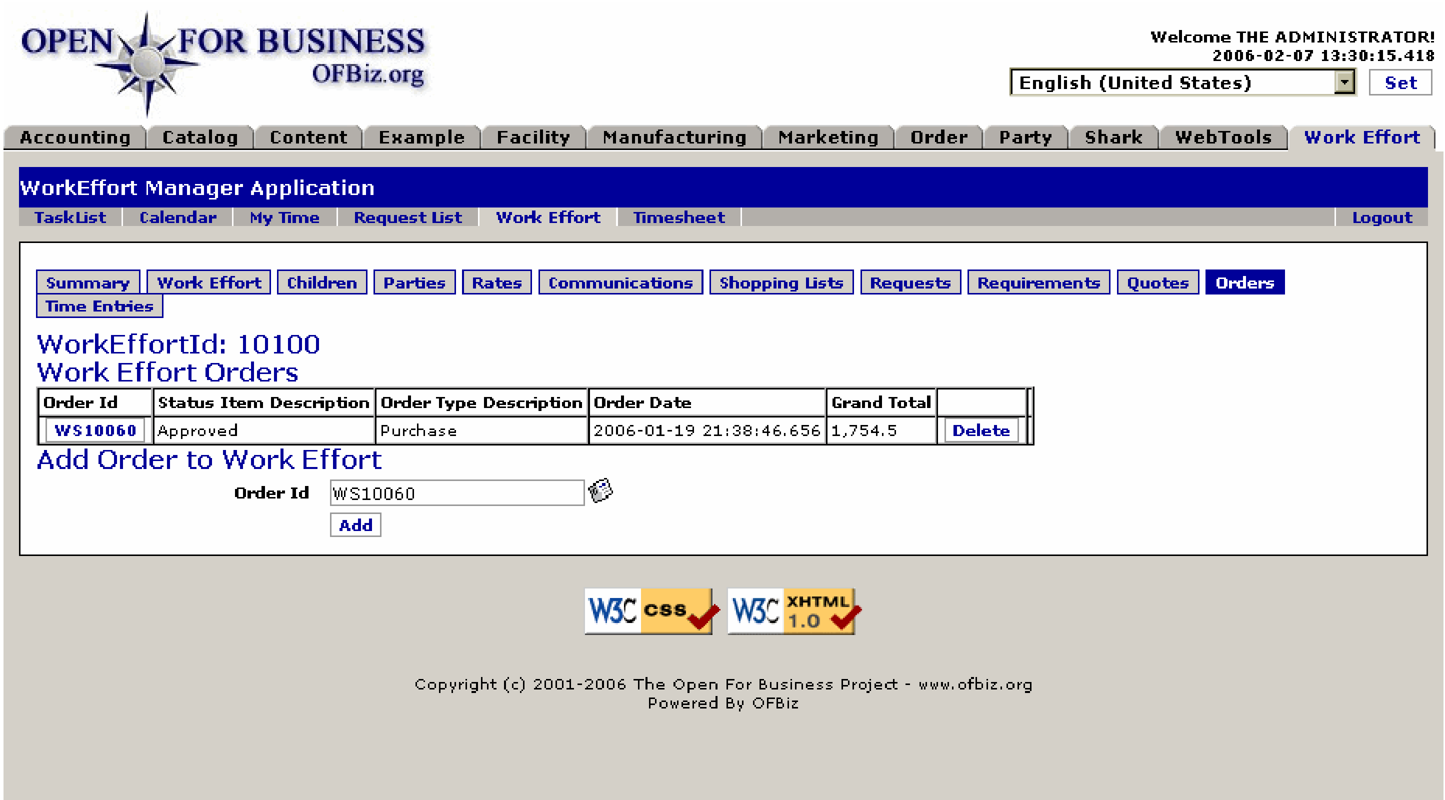
Before you can specify a Quote Item, you must first find the Quote. Enter that here, than proceed to the Quote Item Sequence ID field next.

.5.4.10.6.2 Quote Item Seq ID (popup search tool)

Enter the Sequence ID (use the popup search tool if needed), then click on [Add].

.5.4.11 Orders

.5.4.11.1 ListWorkEffortOrderHeaders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Order
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WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Summary
Work Effort
Children
Parties
Rates
Communications
Shopping Lists
Requests
Requirements
Quotes
Orders
Time Entries

WorkEffortId: 10100

Work Effort Orders

Order Id	Status Item Description	Order Type Description	Order Date	Grand Total	
WS10060	Approved	Purchase	2006-01-19 21:38:46.656	1,754.5	Delete

Add Order to Work Effort

Order Id: WS10060

Add
W3C css
W3C XHTML 1.0

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Any Order associated with the Work Effort can be listed here. Use the tool to associate other Orders.

.5.4.11.2 link buttons

[Delete] [Add] <B>[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]</B>

.5.4.11.3 Table of Work Effort Orders

.5.4.11.3.1 Order ID

Click on the Order ID number to view or edit the Order under the Order Manager.

.5.4.11.3.2 Status Item Description

The current Status of the order.

.5.4.11.3.3 Order Type Description

Is this a Sales Order or a Purchase Order?

.5.4.11.3.4 Order Date

When the Order was placed.

.5.4.11.3.5 Grand Total

The total value of the Order.

.5.4.11.4 Tool to Add Order to Work Effort

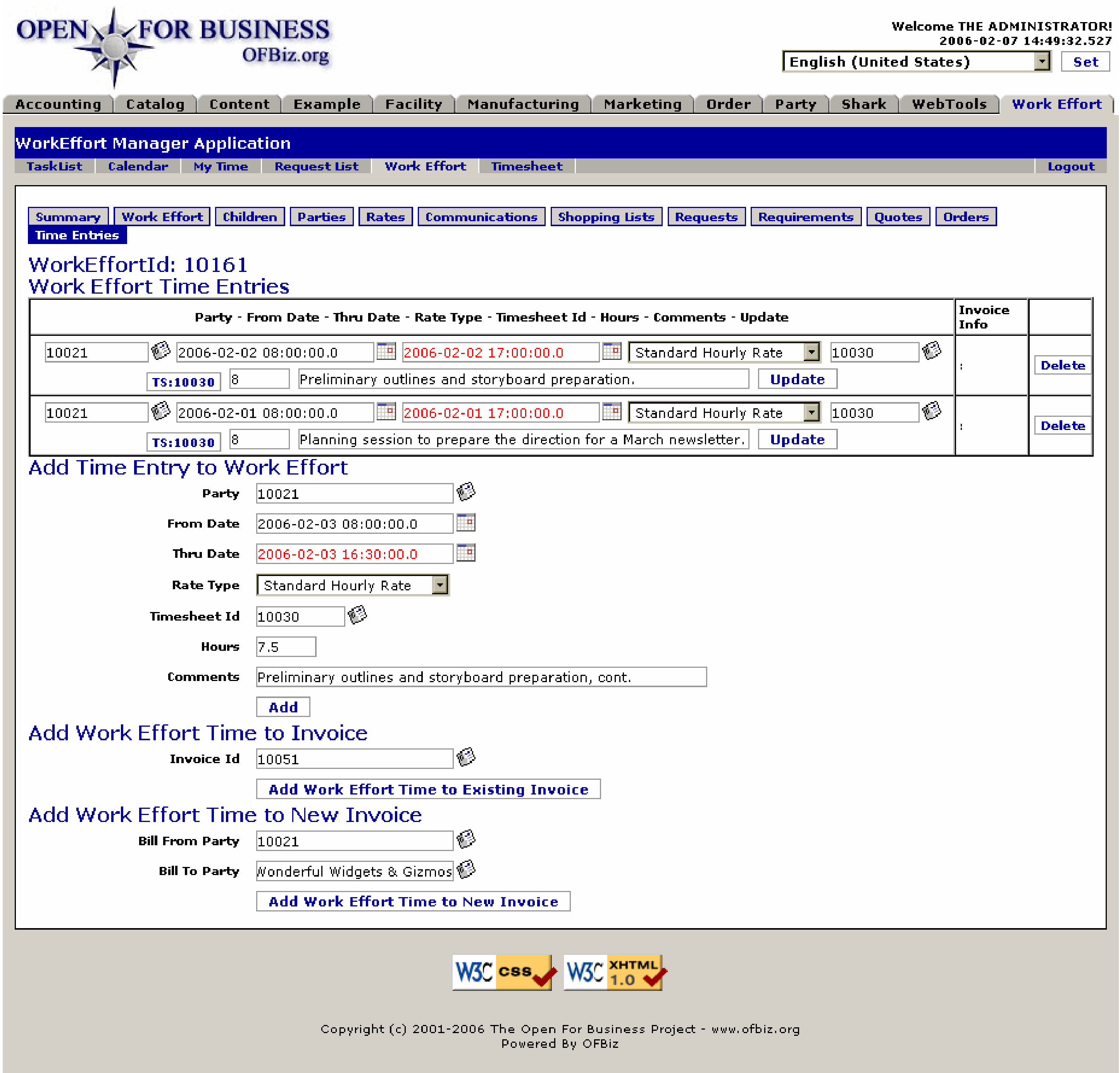
.5.4.11.4.1 Order ID (popup search tool)

Specify the Order ID number, then click [Add].

.5.4.12 Time Entries

.5.4.12.1 EditWorkEffortTimeEntries

id:[13785] image: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Order
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WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Summary
Work Effort
Children
Parties
Rates
Communications
Shopping Lists
Requests
Requirements
Quotes
Orders
Time Entries
W3C css
W3C XHTML 1.0

WorkEffortId: 10161

Work Effort Time Entries

Party - From Date - Thru Date - Rate Type - Timesheet Id - Hours - Comments - Update	Invoice Info	
10021 2006-02-02 08:00:00.0 2006-02-02 17:00:00.0 Standard Hourly Rate 10030 TS:10030 8 Preliminary outlines and storyboard preparation. Update	:	Delete
10021 2006-02-01 08:00:00.0 2006-02-01 17:00:00.0 Standard Hourly Rate 10030 TS:10030 8 Planning session to prepare the direction for a March newsletter. Update	:	Delete

Add Time Entry to Work Effort

Party	10021
From Date	2006-02-03 08:00:00.0
Thru Date	2006-02-03 16:30:00.0
Rate Type	Standard Hourly Rate
Timesheet Id	10030
Hours	7.5
Comments	Preliminary outlines and storyboard preparation, cont.
	Add

Add Work Effort Time to Invoice

Invoice Id	10051
	Add Work Effort Time to Existing Invoice

Add Work Effort Time to New Invoice

Bill From Party	10021
Bill To Party	Wonderful Widgets & Gizmos
	Add Work Effort Time to New Invoice

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Review previous Timesheet Entries and make new Entries against the selected Work Effort at this powerful screen.

.5.4.12.2 link buttons

[Update] [Delete] [Add] [Add Work Effort Time to Existing Invoice] [Add Work Effort Time to New Invoice] <B>[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries] </B>

.5.4.12.3 Table of Time Entries

.5.4.12.3.1 Party (popup search tool)

See the same field below, under <I>Add Time Entry to Work Effort</I>, for a discussion about this field.

.5.4.12.3.2 From Date (popup calendar)

See the same field below, under <I>Add Time Entry to Work Effort</I>, for a discussion about this field.

.5.4.12.3.3 Thru Date (popup calendar)

See the same field below, under <I>Add Time Entry to Work Effort</I>, for a discussion about this field.

.5.4.12.3.4 Rate Type (drop-down box)

See the same field below, under <I>Add Time Entry to Work Effort</I>, for a discussion about this field.

.5.4.12.3.5 Timesheet ID (popup search tool)

See the same field below, under <I>Add Time Entry to Work Effort</I>, for a discussion about this field.

.5.4.12.3.6 Hours

See the same field below, under <I>Add Time Entry to Work Effort</I>, for a discussion about this field.

.5.4.12.3.7 Comments

See the same field below, under <I>Add Time Entry to Work Effort</I>, for a discussion about this field.

.5.4.12.4 Tool to Add Time Entry to Work Effort

.5.4.12.4.1 Party (popup search tool)

Enter the Party ID here; use the popup search tool if needed.

.5.4.12.4.2 From Date (popup calendar)

Enter the Date AND TIME the work effort was actually begun. You will probably need to modify the time entry, keeping it in the format 12:34:56.0, generally in a 24-hour clock style.

.5.4.12.4.3 Thru Date (popup calendar)

Enter the Date AND TIME the work effort was actually FINISHED. You will probably need to modify the time entry, keeping it in the format 12:34:56.0, generally in a 24-hour clock style.

.5.4.12.4.4 Rate Type (drop-down list)

Choose from Standard, Discounted, and Overtime hourly rates.

.5.4.12.4.5 Timesheet ID (popup search tool)

This was created under the Timesheet Tab > Create Timesheet screen. Enter the number here or find with the popup search tool.

.5.4.12.4.6 Hours

Hours represent more than just the difference between the starting time and the finishing time. The worker might have multiple time sheets, doing some of the work on this one, then spending time on another. She might have had to stop work for a while to take care of a personal matter. Enter only the chargeable time here. Double billing is not acceptable.

.5.4.12.4.7 Comments

Any information needed to help Timekeeping staff or management to clearly understand the entry should be added here.

.5.4.12.5 Tool to Add Work Effort Time to Invoice

.5.4.12.5.1 Invoice ID (popup search tool)

Enter the Invoice ID number (use the popup search tool if needed), then click the link [Add Work Effort Time to Existing Invoice].

.5.4.12.6 Tool to Add Work Effort Time to New Invoice

.5.4.12.6.1 Bill From Party (popup search tool)

Enter the ID of the Party doing the billing. In most instances, this would be your Company or one of its subsidiaries. If work was performed by a contracted employee, this could be that employee billing your company. Then click on the link [Add Work Effort Time to New Invoice].

.5.4.12.6.2 Bill To Party (popup search tool)

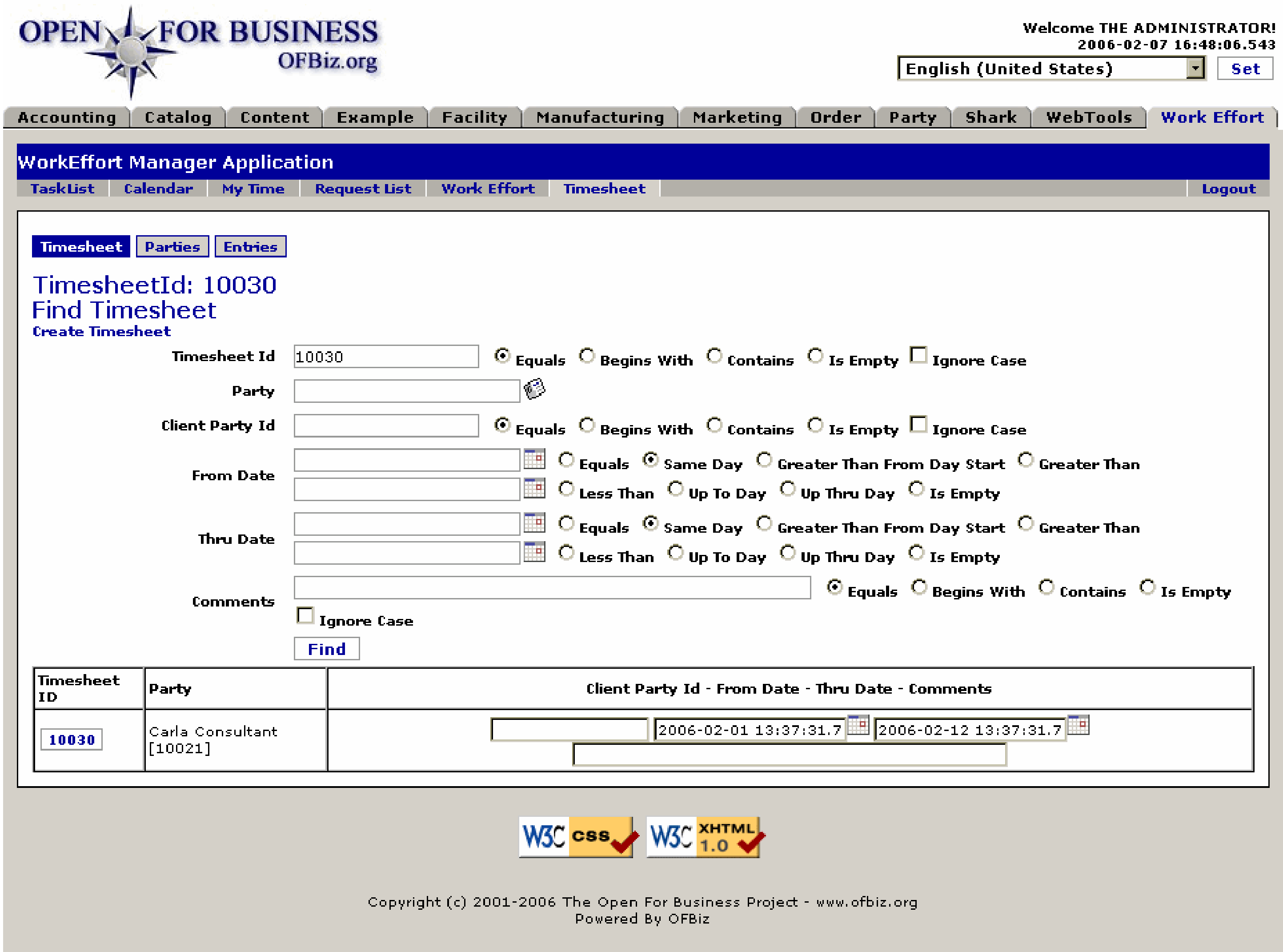
This is the Party that will receive the Invoice. Enter the ID or use the popup search tool. Then click on the link [Add Work Effort Time to New Invoice].

.6 Time Sheet

.6.1 Find Timesheet

.6.1.1 FindTimesheet

id:[DOCWRK2023] image: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Facility
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Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Timesheet
Parties
Entries
Create Timesheet
Find
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TimesheetId: 10030
Find Timesheet

Timesheet Id	10030 ● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case
Party	
Client Party Id	● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case
From Date	○ Equals ● Same Day ○ Greater Than From Day Start ○ Greater Than ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty
Thru Date	○ Equals ● Same Day ○ Greater Than From Day Start ○ Greater Than ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty
Comments	● Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case

Timesheet ID	Party	Client Party Id - From Date - Thru Date - Comments
10030	Carla Consultant [10021]	2006-02-01 13:37:31.7 2006-02-12 13:37:31.7

Enter parameters at the top; found Timesheets will be presented in the table.

.6.1.2 link buttons

[Create Timesheet] [Find] <B> [Timesheet] [Party] [Entries]</B>

.6.1.3 Timesheet ID

What you are looking for. If you know this number, enter here, select the Equals radio button, and the Find button will bring it up. You may enter a partial number combined with the appropriate radio buttons for a search.

.6.1.4 Party (popup search tool)

To search for all the Timesheets current for a particular Party, enter the Party ID here with the Equals radio button selected. If not sure of the Party ID, use the popup search tool.

.6.1.5 Client Party ID

If the TimeSheet you seek relates to work for a Contractor, or a project has been assigned to the employee related to a Work Order from another Party, enter that Client ID here.

.6.1.6 From Date (popup calendars)

If you know the exact starting date for the TimeSheet, enter it here. For example, if the Party has multiple TimeSheets, but you only want the one starting today, enter that date.<br> If you are searching for a timesheet within a range of dates, enter the oldest likely date in the top calendar and select a radio button other than Equals; then in the lower From calendar, select a radio other than Is Empty. Mirror that action with the Thru Date calendars.

.6.1.7 Thru Date (popup calendars)

If you know the ending date for the TimeSheet you seek, enter that in the top calendar and use radio button Equals. <br> Use the procedure discussed with From Date to bracket the date.

.6.1.8 Comments

If you know what may have been written in the Comments section, search on that using the appropriate radio button.

.6.1.9 Table of found timesheets

.6.1.9.1 Timesheet ID

Click on this number to View or Edit the timesheet.

.6.1.9.2 Party ID

The Party assigned this Timesheet.

.6.1.9.3 Client Party ID

If the TimeSheet relates to work for a Contractor, or a project has been assigned to the employee related to a Work Order from another Party, this is their ID.

.6.1.9.4 From Date

When the work begins.

.6.1.9.5 Thru Date

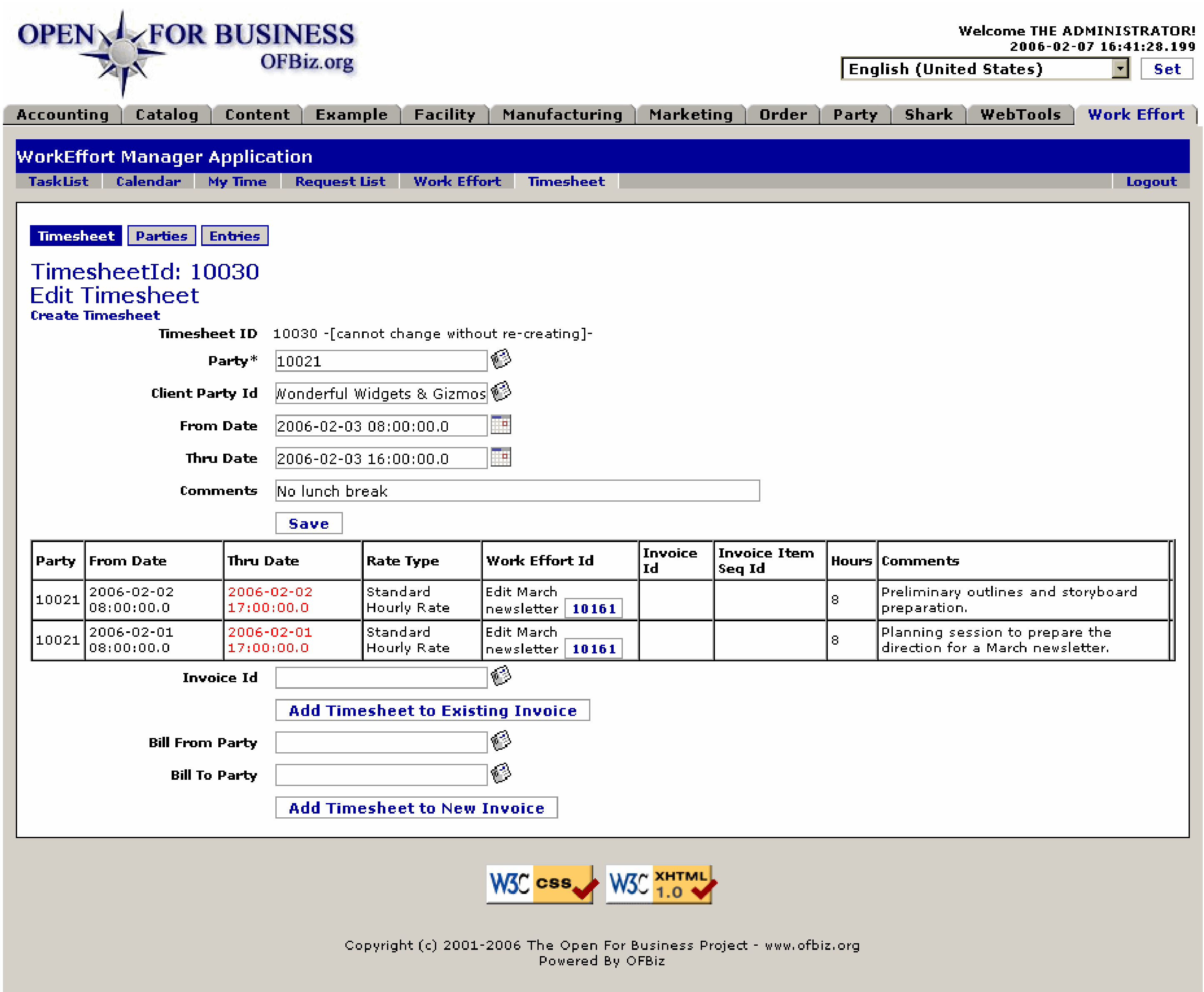
When the work ends.

.6.1.9.6 Comments

Additional information pertinent to the timesheet might be found here.

.6.2 Edit Timesheet

.6.2.1 EditTimesheet-existing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Set
Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort
WorkEffort Manager Application
TaskList | Calendar | My Time | Request List | Work Effort | Timesheet | Logout
Timesheet | Parties | Entries
Save
Add Timesheet to Existing Invoice
Add Timesheet to New Invoice
W3C CSS
W3C XHTML 1.0

TimesheetId: 10030

Edit Timesheet

Create Timesheet

Timesheet ID	10030 -[cannot change without re-creating]-
Party*	10021
Client Party Id	Wonderful Widgets & Gizmos
From Date	2006-02-03 08:00:00.0
Thru Date	2006-02-03 16:00:00.0
Comments	No lunch break

Party	From Date	Thru Date	Rate Type	Work Effort Id	Invoice Id	Invoice Item Seq Id	Hours	Comments
10021	2006-02-02 08:00:00.0	2006-02-02 17:00:00.0	Standard Hourly Rate	Edit March newsletter 10161			8	Preliminary outlines and storyboard preparation.
10021	2006-02-01 08:00:00.0	2006-02-01 17:00:00.0	Standard Hourly Rate	Edit March newsletter 10161			8	Planning session to prepare the direction for a March newsletter.

Invoice Id	
Bill From Party	
Bill To Party	

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Anything that needs to be done with a Timesheet can be done here or at the other two tabs which follow.

.6.2.2 link buttons

[Create Timesheet] [Save] [Add Timesheet to Existing Invoice] [Add Timesheet to New Invoice] <B>[Timesheet] [Parties] [Entries] </B>

.6.2.3 Timesheet ID

This is the one you are editing; it cannot be changed.

.6.2.4 Party * (popup search tool)

The person whose time is or will be recorded on the Timesheet. This is a required field. Use the popup search tool if needed to locate the Party ID.

.6.2.5 Client Party ID (popup search tool)

If the work is being performed under a contract to a customer, or if the project needs to be tracked back to a customer's purchase, this is where you tie the two together.

.6.2.6 From Date (popup calendar)

The beginning of the period covered by this Timesheet. You will need to manually edit the elements, maintaining the YYYY-MM-DD HH:MM:SS.0 format whether or not you use the popup calendar.

.6.2.7 Thru Date (popup calendar)

End of the period covered by this Timesheet. You will need to manually edit the elements, maintaining the YYYY-MM-DD HH:MM:SS.0 format whether or not you use the popup calendar.

.6.2.8 Comments

Any additional information needed to process this timesheet. For example, is this an overtime period? Was there non-productive time covered by this period, i.e., a general office meeting or training?

.6.2.9 Summary Timesheet table

.6.2.9.1 Party

The ID for the Party whose Timesheet we are looking at.

.6.2.9.2 From Date

The beginning of the period covered by this Timesheet. To make changes in this field, use the Entries sub-tab.

.6.2.9.3 Thru Date

The end of the period covered by this Timesheet. Note that if this is highlighted in color, the period has past. To make changes in this field, use the Entries sub-tab.

.6.2.9.4 Rate Type

Standard, Discounted, or Overtime Hourly rates are indicated here. To make changes in this field, use the Entries sub-tab.

.6.2.9.5 Work Effort ID

A Timesheet is typically generated off a Work Effort ID; this column identifies that. Click on the ID to view or edit the Work Effort.

.6.2.9.6 Invoice ID

When the work is charged back to a customer, the Invoice ID is indicated here. See the tool below this table for assigning work to an Invoice.

.6.2.9.7 Invoice Item Seq ID

Within the Invoice there may be several Items listed; this identifies which of those Items the time is being charged against.

.6.2.9.8 Hours

How many hours are being charged against this time period for this Work Effort ID and Invoice ID. Use the Entries tab to enter time for this Timesheet.

.6.2.9.9 Comments

Any additional information needed to process this timesheet. For example, is this an overtime period? Was there non-productive time covered by this period, i.e., a general office meeting or training?

.6.2.10 Invoice ID (popup search tool)

Enter the ID for the customer's Invoice here, then click on the link [Add Timesheet to Existing Invoice]. Use the popup search tool to find the Invoice Id, if needed.

.6.2.11 Bill From Party (popup search tool)

Your company may have several different entities; indicate which Party Group the customer is being charged from. Or, this may from a Contractor/Consultant working directly for you; this would be their Party Id here.

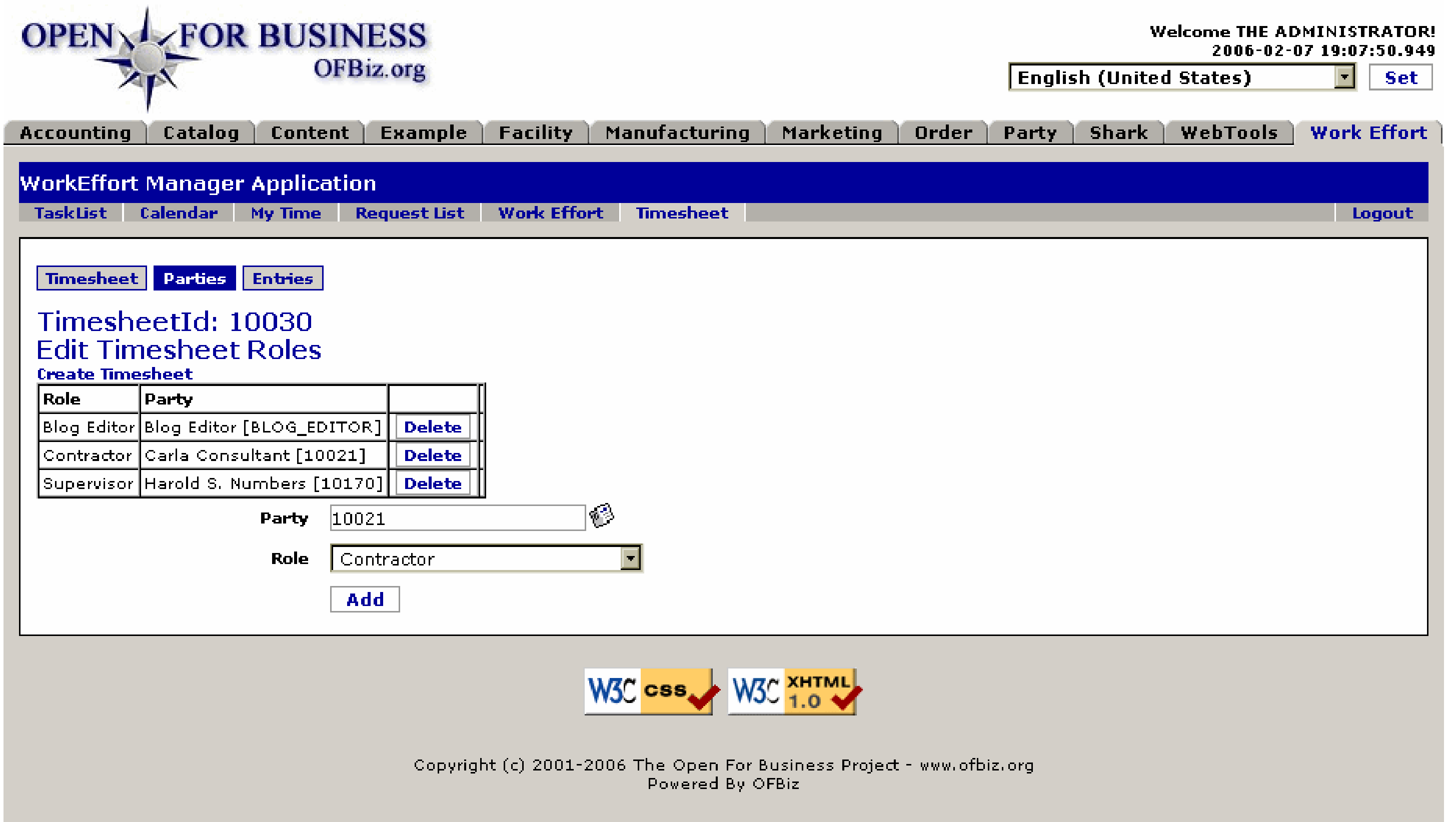
.6.2.12 Bill To Party (popup search tool)

This would be the customer or the customer's agent who will be receiving the Invoice. Or, if being charged for time worked by a Consultant, this would be your Company name here. To create a new Invoice, click the link [Add Timesheet to New Invoice].

.6.3 Parties

.6.3.1 EditTimesheetRoles

id:[DOCWRK2062] image: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Set
Accounting
Catalog
Content
Example
Facility
Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Timesheet
Parties
Entries
Create Timesheet
Add
W3C CSS
W3C XHTML 1.0

Welcome THE ADMINISTRATOR!
2006-02-07 19:07:50.949

TimesheetId: 10030
Edit Timesheet Roles

Role	Party	
Blog Editor	Blog Editor [BLOG_EDITOR]	Delete
Contractor	Carla Consultant [10021]	Delete
Supervisor	Harold S. Numbers [10170]	Delete

Party 10021

Role Contractor

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What Role is the Timesheet Owner playing in this Timesheet? What other Parties are involved and what are their Roles?

.6.3.2 link buttons

[Create Timesheet] [Add] [Delete] <B>[Timesheet] [Parties] [Entries]</B>

.6.3.3 Table of existing Roles

.6.3.3.1 Role

The assigned Role for this Party.

.6.3.3.2 Party

A Party with a relationship to this Timesheet assigned to the Role.

.6.3.4 Tool to assign Party and Role

.6.3.4.1 Party (popup search tool)

Enter the Party ID of the Party being added to this Timesheet.

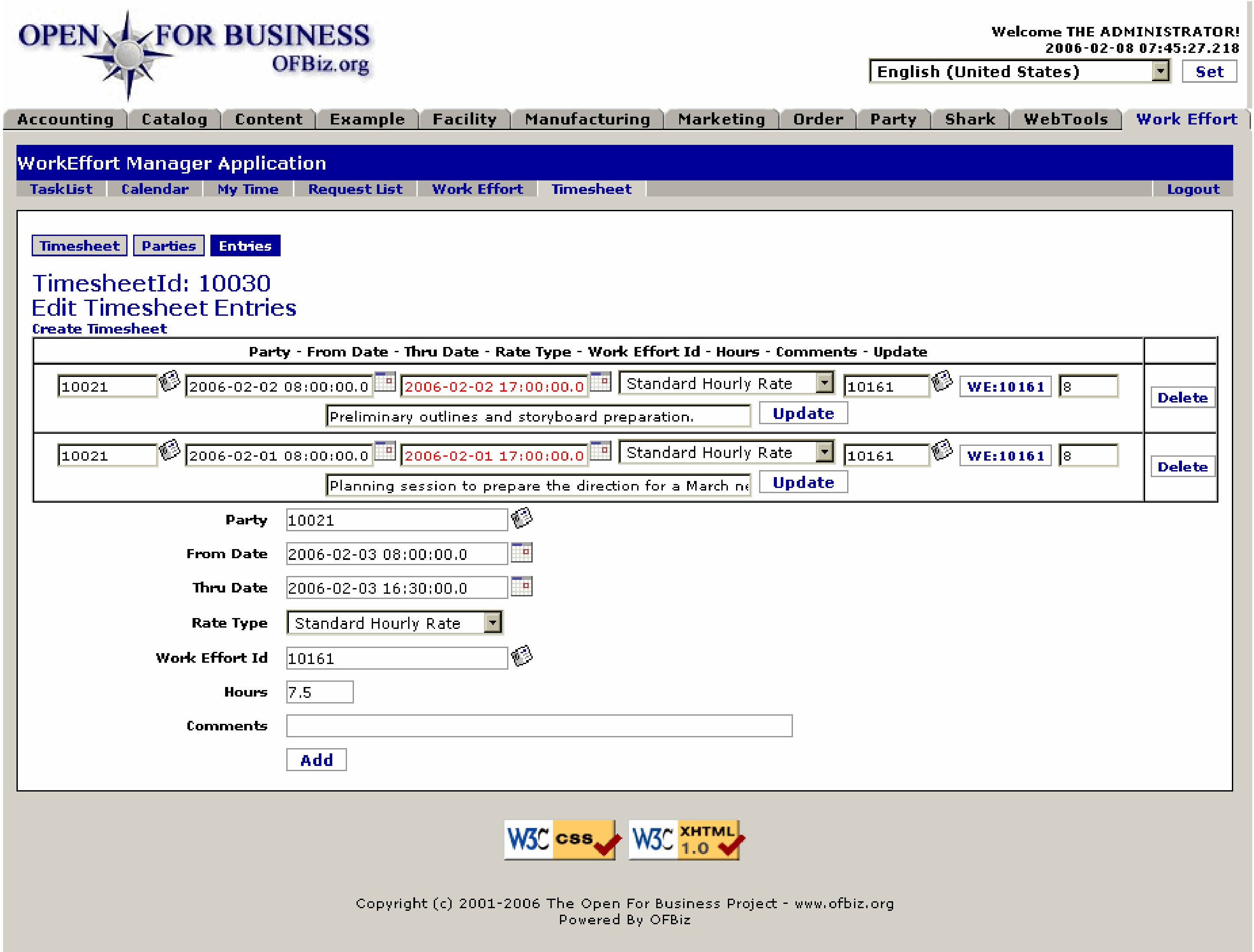
.6.3.4.2 Role (drop-down box)

Select the Role performed by this Party in relation to this Timesheet. Remember that no Role can be assigned which has not been established for this Party at the Party Manager > Roles tab.

.6.4 Entries

.6.4.1 createTimeSheetEntry

id:[DOCWRK2067] image:


OPEN FOR BUSINESS
OFBiz.org
Welcome THE ADMINISTRATOR!
2006-02-08 07:45:27.218
English (United States)
Set
Accounting
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Manufacturing
Marketing
Order
Party
Shark
WebTools
Work Effort
WorkEffort Manager Application
TaskList
Calendar
My Time
Request List
Work Effort
Timesheet
Logout
Timesheet
Parties
Entries
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TimesheetId: 10030

Edit Timesheet Entries

Create Timesheet

Party	From Date	Thru Date	Rate Type	Work Effort Id		Hours	Comments	Update	
10021	2006-02-02 08:00:00.0	2006-02-02 17:00:00.0	Standard Hourly Rate	10161	WE:10161	8	Preliminary outlines and storyboard preparation.	Update	Delete
10021	2006-02-01 08:00:00.0	2006-02-01 17:00:00.0	Standard Hourly Rate	10161	WE:10161	8	Planning session to prepare the direction for a March ne	Update	Delete

Party	10021
From Date	2006-02-03 08:00:00.0
Thru Date	2006-02-03 16:30:00.0
Rate Type	Standard Hourly Rate
Work Effort Id	10161
Hours	7.5
Comments	
	Add

After an initial entry is made, you may return to add other entries with the time entry tool.

.6.4.2 link buttons

[Create Time Sheet] [Update] [Delete] [Add] <B> [Timesheet] [Parties] [Entries]</B>

.6.4.3 Table of Timesheet Entries

.6.4.3.1 Party (popup search tool)

You can change the Party ID at this point if needed.

.6.4.3.2 From Date (popup calendar)

If the starting day or time needs adjusting, do it here.

.6.4.3.3 Thru Date (popup calendar)

If the ending date or time needs adjusting, do it here.

.6.4.3.4 Rate Type (drop-down box)

Select from Standard, Overtime, or Discounted Hourly Rate.

.6.4.3.5 Work Effort ID

Shows the Work Effort item which drives this Timesheet. Click on this link to edit or review the item.

.6.4.3.6 Hours

Record the actual hours and tenths (such as 6.25 for 6 hours and 15 minutes).

.6.4.3.7 Comments

Whatever additional information is needed to make the timesheet meaningful to those who will process it or review it.

.6.4.4 Party (popup search tool)

The Party performing the effort which is being recorded on the Timesheet.

.6.4.5 From Date (popup calendar)

Beginning date AND TIME of the work effort being recorded.

.6.4.6 Thru Date (popup calendar)

Ending date AND TIME for the work effort being recorded here.

.6.4.7 Rate Type

This would generally be either the Standard, Discounted or Overtime Hourly Rate.

.6.4.8 Work Effort ID (popup search tool)

This would be the Work Effort item which drives this Timesheet.

.6.4.9 Hours

Record the actual hours and tenths (such as 6.25 for 6 hours and 15 minutes).

.6.4.10 Comments

Whatever additional information may be useful to those processing or reviewing this Timesheet.