

Configuring Timecard Templates

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What is a Timecard Template?

Timecard Templates allow you to customize what field options are available for timecards filled out by employees. These are meant to be approved by customer supervisors. Would you like a total number of hours or hours broken up into each day? Would you like punch in and out times? Do they need to be able to add their own adjustments or leave a note? You have a lot of options to choose from.

How Do I Utilize Timecard Templates?

Timecard templates can be set up for specific customers or employees. They can also be used as a default for all. Brand new to timecards or configurations and don't know where to start? Utilize the following steps:

Timecard Templates are located in WebCenter Admin under the time tab.

To set up a timecard template to be used in WebCenter:

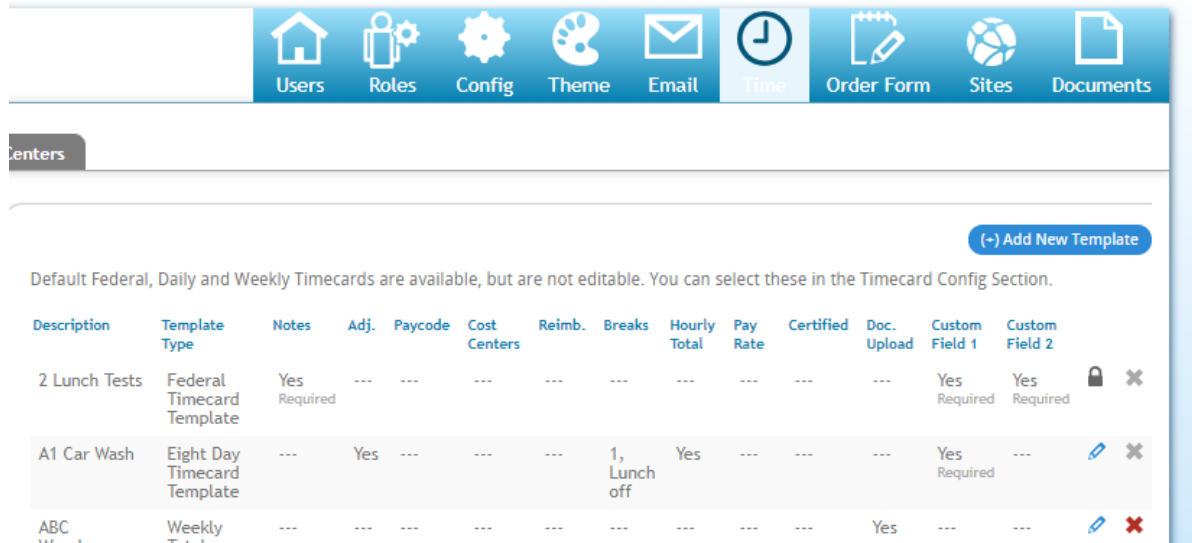
1. [Pick a timecard template](#)
2. [Customize](#)
3. [Set Up Rules](#)

Picking the Right Template

When you start creating a timecard template there are several available options.

To Find Timecard Templates:

1. Log into WebCenter Admin
2. Select the Time Tab



Here will be a list of timecard templates already created. If you have multiple entities or instances of WebCenter, you may have options on the side to select from.

To Add a New Configured Timecard Template:

1. Select the **+ Add New Template** button in the upper right
2. Enter a Description that describes the purpose of the timecard template. Make it something that will be easy to find again
3. Select the Template Type (see templates available below for more information)
4. Select options (see customize your timecards below)
5. Save & Close

Edit Template

Description

Template Type **Daily Total Timecard Template** ▼

Show Adjustments

Show Notes

Notes Required

Show Pay Code

Pay Code Read Only

Show Cost Centers

Allow Free-Text Cost Centers

Show Reimbursement Flags

Show Pay Rate

Pay Rate Read Only

Show Overtime Pay Rate

Over Time Pay Rate Read Only

Show Double Time Pay Rate

Double Time Pay Rate Read Only

Show Certified

Show Document Upload

Show Custom Field 1

Custom Field 1 Label

Custom Field 1 Required

Cancel

Timecard Templates Available

Daily Total

Allows employees to enter total hours for each day of the week.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	12/9/2012	12/10/2012	12/11/2012	12/12/2012	12/13/2012	12/14/2012	12/15/2012
Total Time							

Regular Overtime Double Time **Total Hours**

Eight Day

Similar to Daily Total above but for 8 day week.

	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	12/8/2012	12/9/2012	12/10/2012	12/11/2012	12/12/2012	12/13/2012	12/14/2012	12/15/2012
Total Time								

Regular Overtime Double Time **Total Hours**

Federal

Employees enter time punched in and out. There are configuration options to allow for lunch and break punches.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	12/9/2012	12/10/2012	12/11/2012	12/12/2012	12/13/2012	12/14/2012	12/15/2012
Punch In							
Lunch Out							
Lunch In							
Punch Out							

Regular Overtime Double Time **Total Hours**

Professional

Customized template that can show RT, OT, DT, Hol, Bonus, etc. options.

Total Time	RT	OT	Hol	Bonus
	24	16	8	\$ 100

36 Regular 16 Overtime 8 Double Time 0 Total Hours

Adjustments

\$0.00 Total Adjustments

Salary

Has employees check boxes for days worked in a week instead of entering time.

	Sun 12/9/2012	Mon 12/10/2012	Tue 12/11/2012	Wed 12/12/2012	Thu 12/13/2012	Fri 12/14/2012	Sat 12/15/2012
Days Worked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Semi-Monthly

Allows employees to enter hours for 1/2 a month.

Dec	Paycode	RT	OT	DT
01	Reg	8.00	0.00	0.00
02	Reg	8.00	0.00	0.00
03	Reg	8.00	0.00	0.00
04	Reg	8.00	0.00	0.00
05	Reg	8.00	0.00	0.00
06	Reg	8.00	0.00	0.00
07	Reg	8.00	0.00	0.00
08	Reg	8.00	0.00	0.00
09	Reg	8.00	0.00	0.00
10	Reg	8.00	0.00	0.00
11	Reg	8.00	0.00	0.00
12	Reg	8.00	0.00	0.00
13	Reg	8.00	0.00	0.00
14	Reg	8.00	0.00	0.00
15	Reg	8.00	0.00	0.00

Type Qty. Unit Pay Rate Cost

Unit

Employees only enter number of units for pay.

Number of Units

Weekly Total

Enter RT, OT, and DT total hours for the current week.

	RT	OT	DT
Total Time	<input type="text"/>	<input type="text"/>	<input type="text"/>

Regular Overtime Double Time **Total Hours**

Customize Timecards to Fit Your Needs

Each timecard template has different customizable options for you to select from.

After you have named and selected the timecard template you wish to use, you will have additional options to choose from.

In the example below, we chose the Professional Timecard Template. Underneath the template type, different fields and options will appear for you to customize what the employee or customer contact fills out.

Edit Template

Description

Template Type

Show RHours

Show OHours

Show DHours

Hourly Pay Code Option 1

Hourly Pay Code Option 2

Unit Pay Code Option 1

Unit Pay Code Option 2

Show Adjustments

Show Notes

Notes Required

[Cancel](#) [Preview](#) [Save and Close](#)

Set up Rules to Apply Timecards

Once you set up a timecard template the way you like it, you need to set up a rule for when this timecard should be used. Is this timecard template only for a particular customer or a whole branch? Are these only employees who have a specific job title or work for a specific supervisor?

Rules can be set up for a specific contact, employee, job title, department, customer, branch, or entity.

To set up a rule:

1. In WebCenter Admin, navigate to Configs tab and select 'Timecards' on the left
2. Click on [Show Rules \(14\) ▶](#) next to Timecard Template

3. Fill out the following information:

Rules

When: is Use:

- Select a filter: choose an option from the drop down (ex. Customer or Employee)
- Select the criteria in the next drop down by selecting it or using the drop down to choose from options (ex. Buy N Large or Lorelai Woodbury)
- Select a Value: select the timecard template you created earlier

4. Select the Add Rule button to complete.

Rules

When: is Use:

To Edit or Remove a Rule:

Locate the rule under Timecards > Timecard Template.

- To delete, select the X next to the rule you wish to remove
- To edit, select the edit option to the left of the rule.

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