

## Quick Start User Guide

# How to create Timecards in Dynamics SL

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Design and Construction Management uses Microsoft Dynamics SL, an ERP solution that combines powerful project and financial management capabilities. This guide provides the steps you will need to complete and submit weekly Timecards.

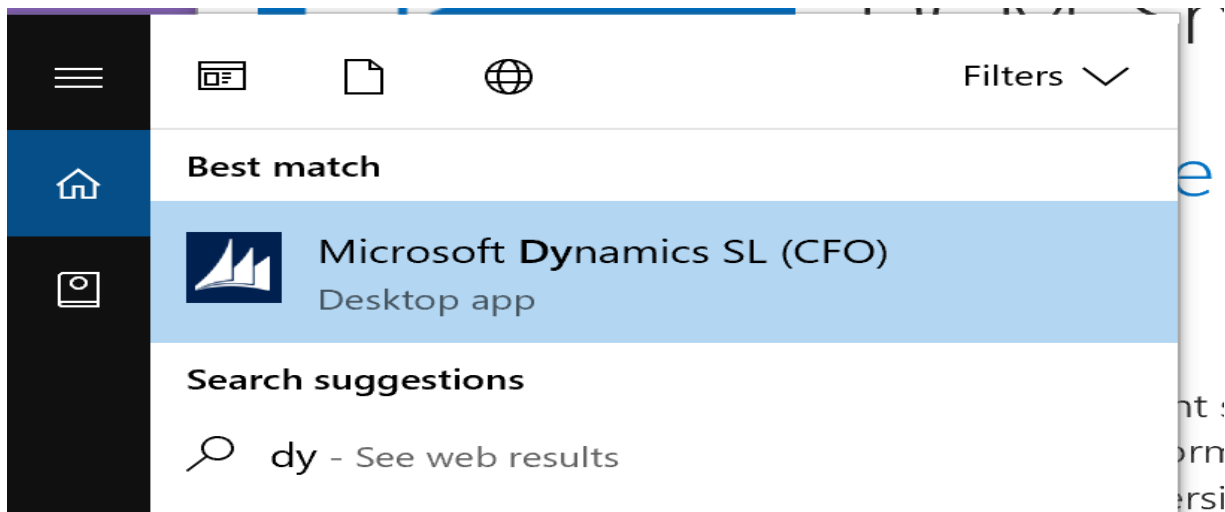
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[cpmahelp@ucdavis.edu](mailto:cpmahelp@ucdavis.edu)



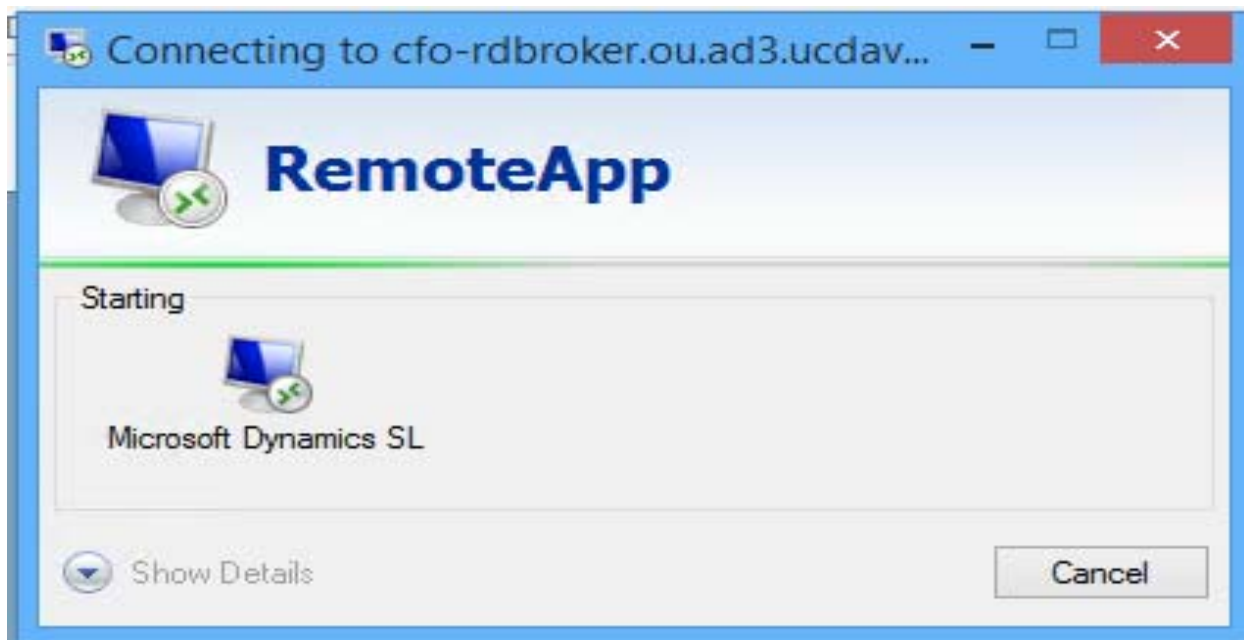
# Getting Started

Start the Dynamics application by searching in your Start Menu in the lower left hand corner of your screen (type “Dy” in the search bar). If you do not have Dynamics in your start menu, contact AdminIT at 752-1222.

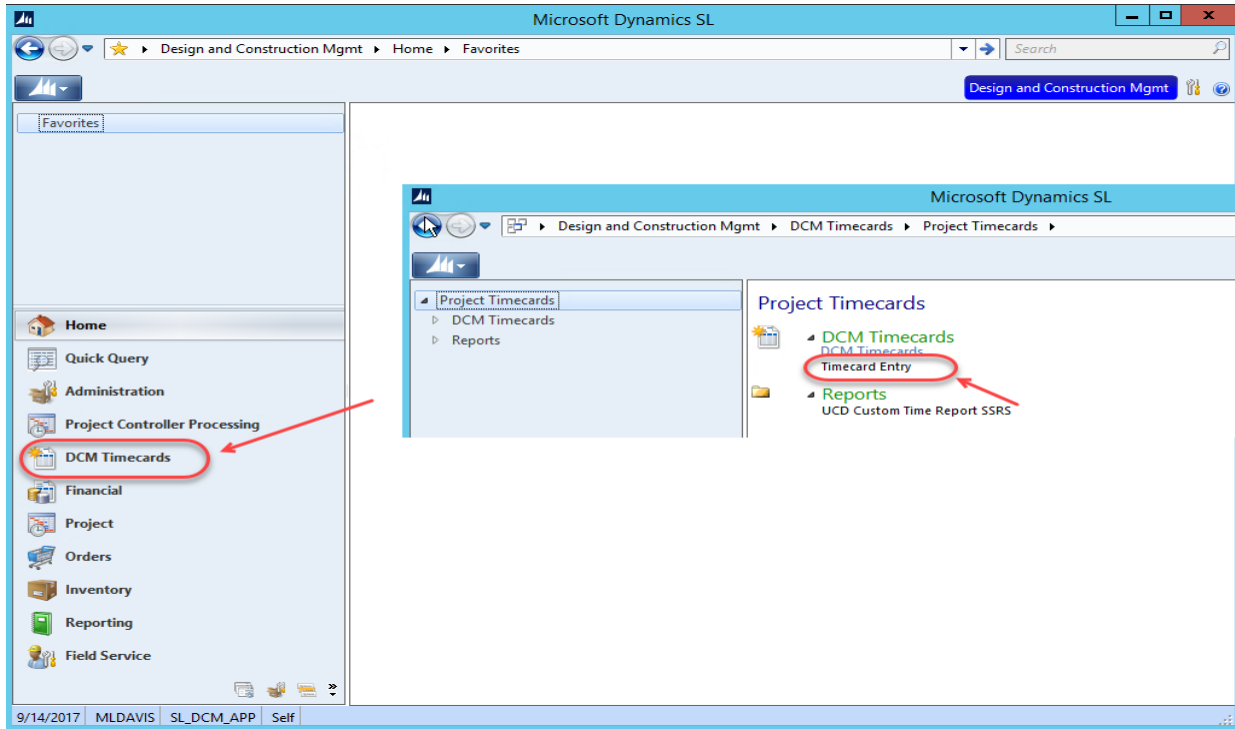


## Logging into Dynamics SL

The RemoteApp (Dynamics SL) will launch. The launching of the application may take a few moments.

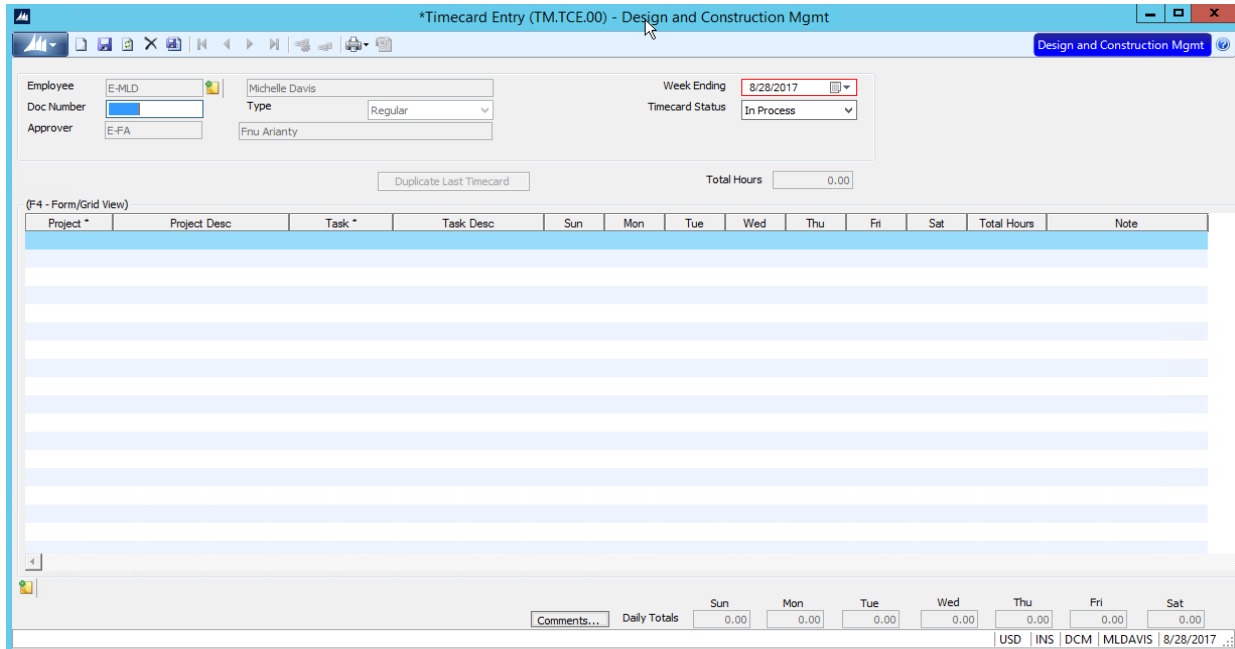


The Dynamics SL Menu will open. Click once on **“DCM Timecards”**, then click once on **“Timecard Entry”**.

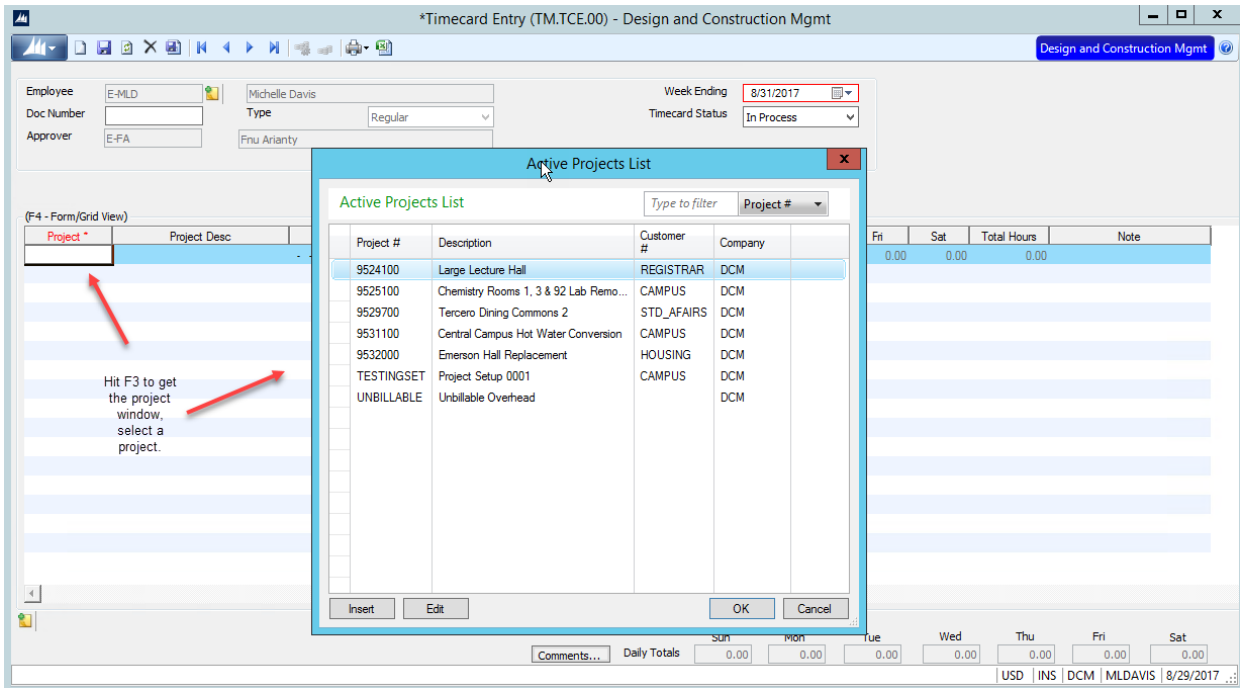


## Creating a Timecard

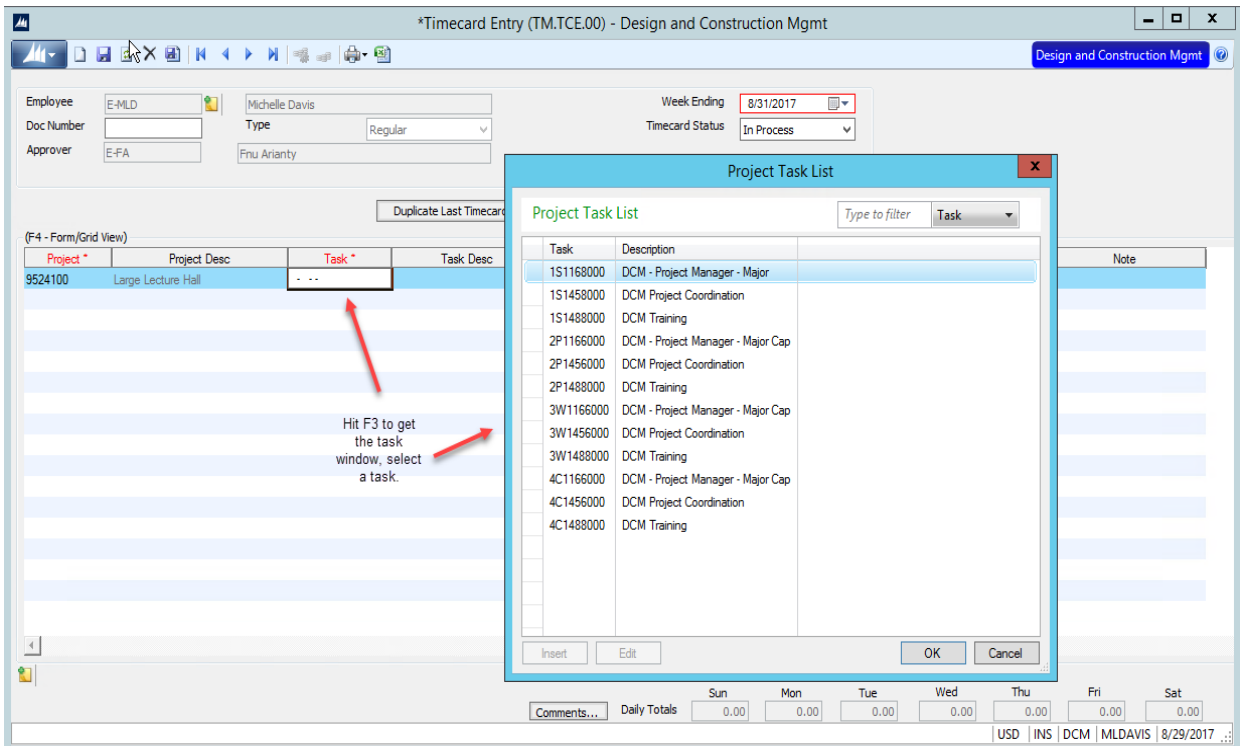
When you click on **“Timecard Entry”** an initial timecard opens with today’s date in the **“Week Ending”** field. You can tab through the doc number field to get to the week ending field or you can go directly to the week ending field to select the correct week ending date. **Note:** You must tab out of the week ending field to be able to make an entry on a timecard, if you don’t you will get an error on the screen.



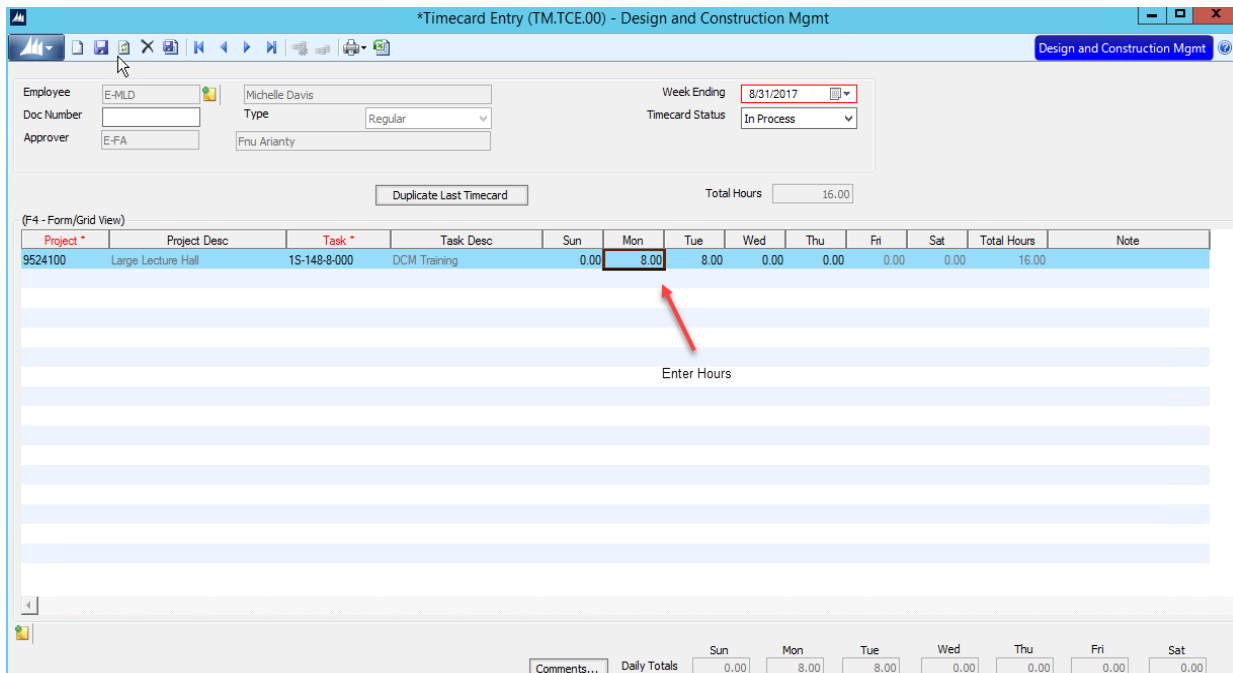
To enter time on your timecard tab through the **“Week Ending”** field and then click on **“Project”** field, hit F3, and select a project from the Active Projects List window.




Once you select a project the project description will fill in and it will place you in the **“Task”** field, hit F3, and select a task from the Project Task List window. The tasks are organized by Phase – S,P,W,C & E (Equipment). Also, subs 5,6 & 8 can have labor posted to them if the work performed is from that sub.

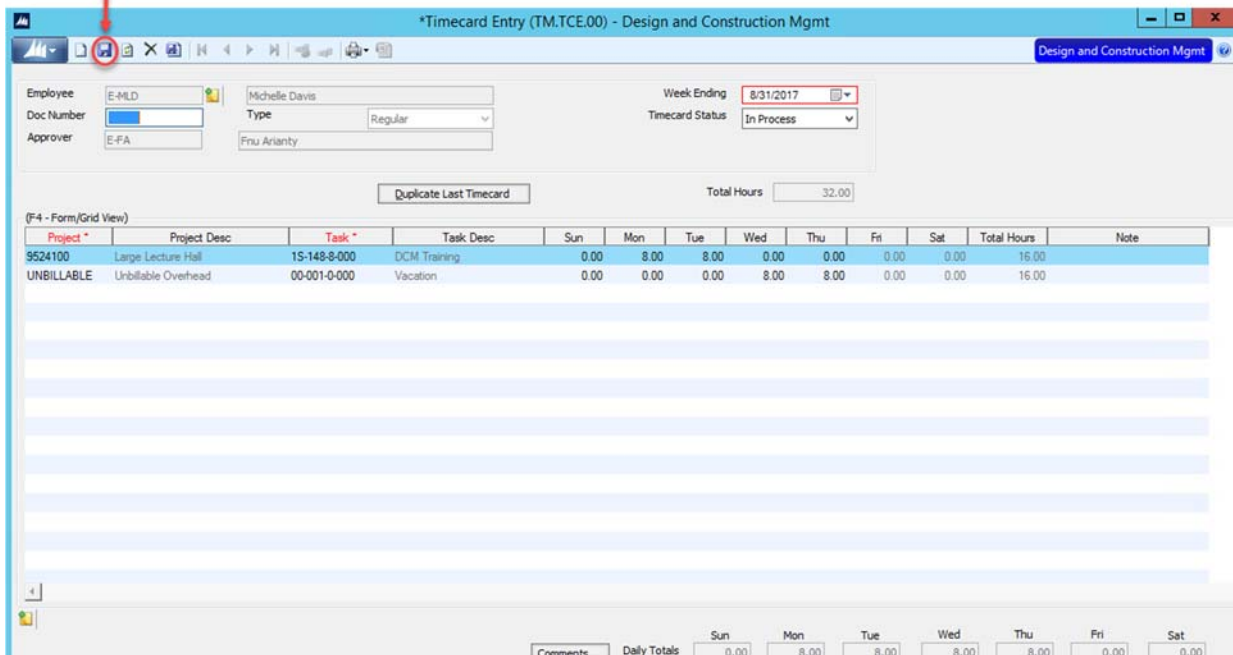


Once you select a task, the task description will fill in, tab to the day of the week you'd like and enter your hours. **Repeat the process to add more lines to your timecard.**

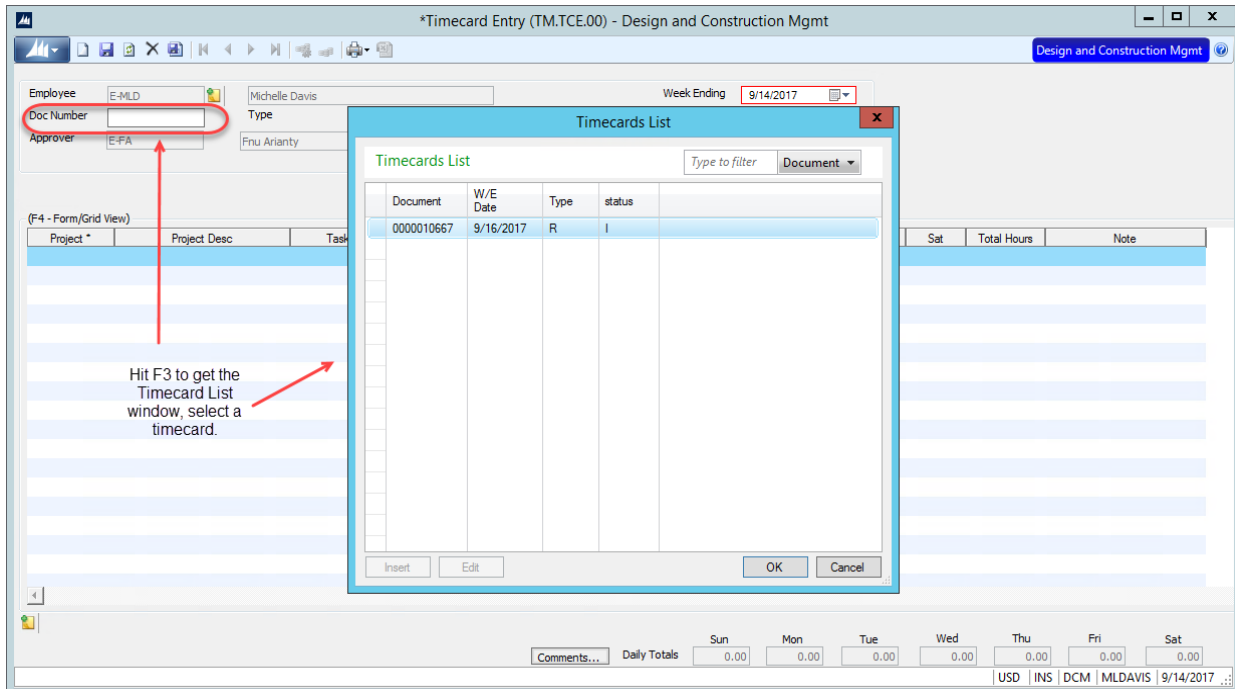


**PLEASE NOTE:** to account for time that should not be charged to a project, choose the **“UNBILLABLE”** project, then pick the appropriate task associated with unbillable. (i.e. vacation, sick, etc).

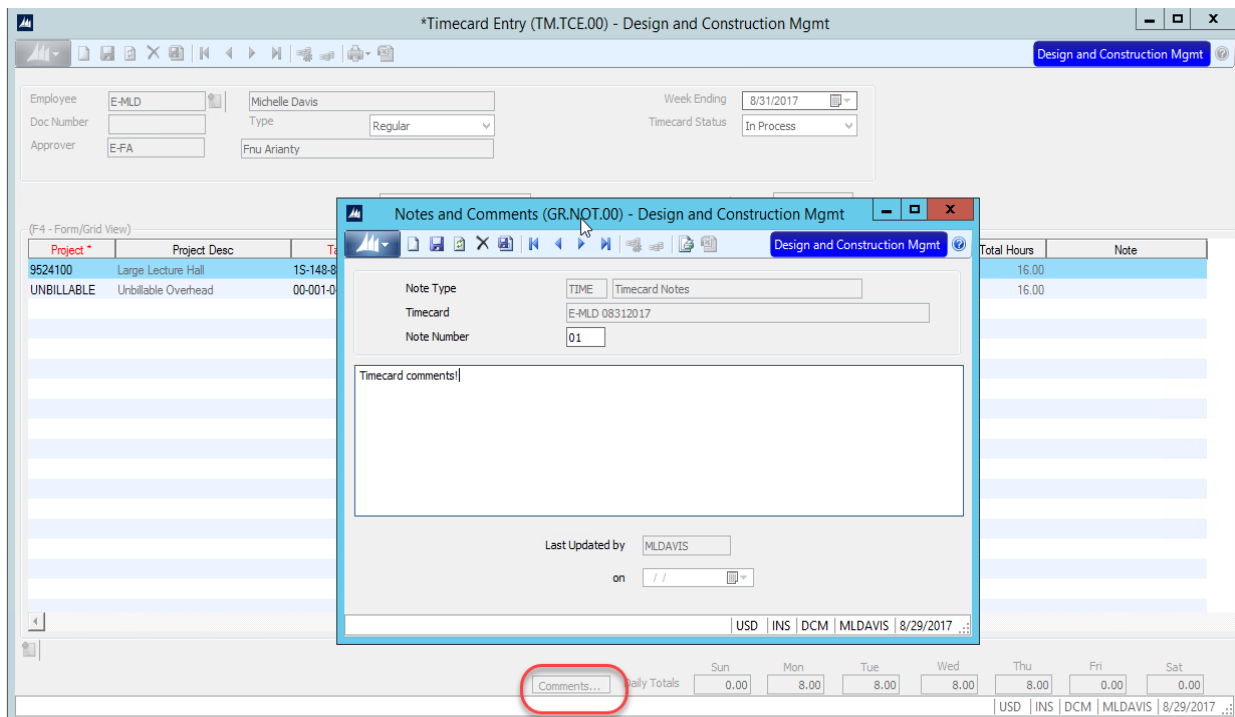
After you are finished entering your time, save the document by clicking the  icon. Do not change the timecard status until you are ready to submit your timecard. You can re-open the timecard any time and edit it until you change the status. **Note:** A document number will be assigned once you save the Timecard.



You can re-open a timecard any time and edit it while it is still in **“In Process”** status. When you change the status to **“Completed”** you will not be able to edit it. To re-open a timecard make sure you are in the timecard entry screen and your cursor is in the **“Doc Number”** area, click F3, it will open up the Timecard List window where you can select past timecards that are available.

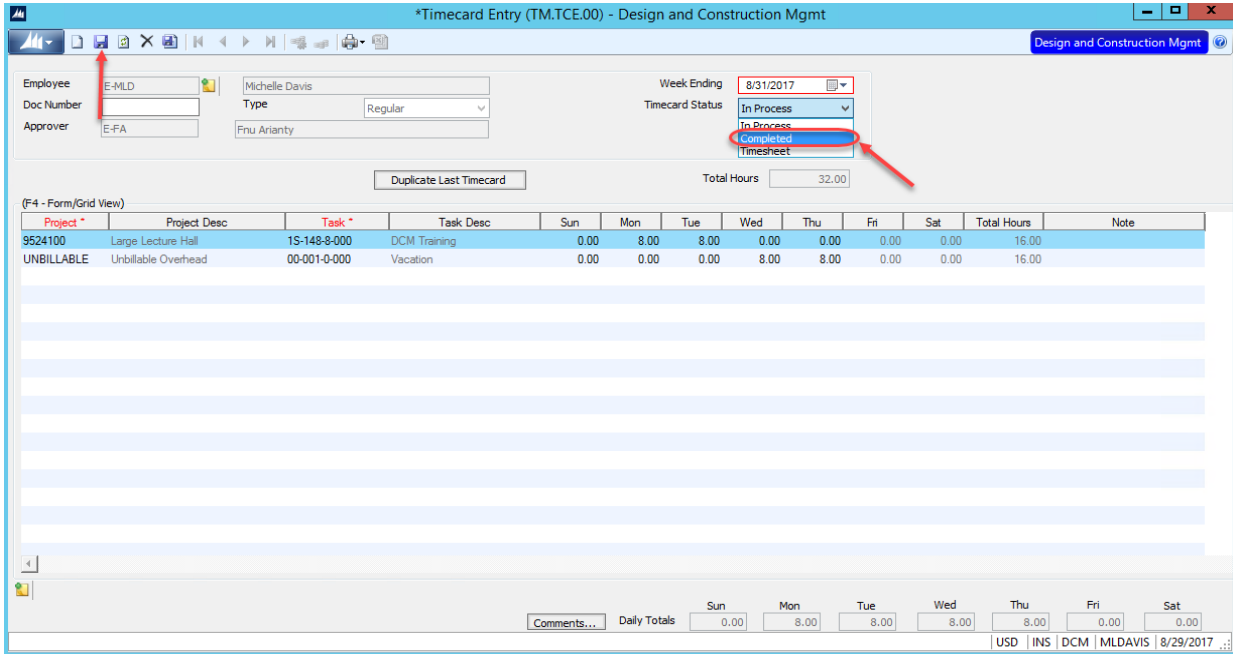


Use the comments button at the bottom of the screen to communicate information about your timecard.




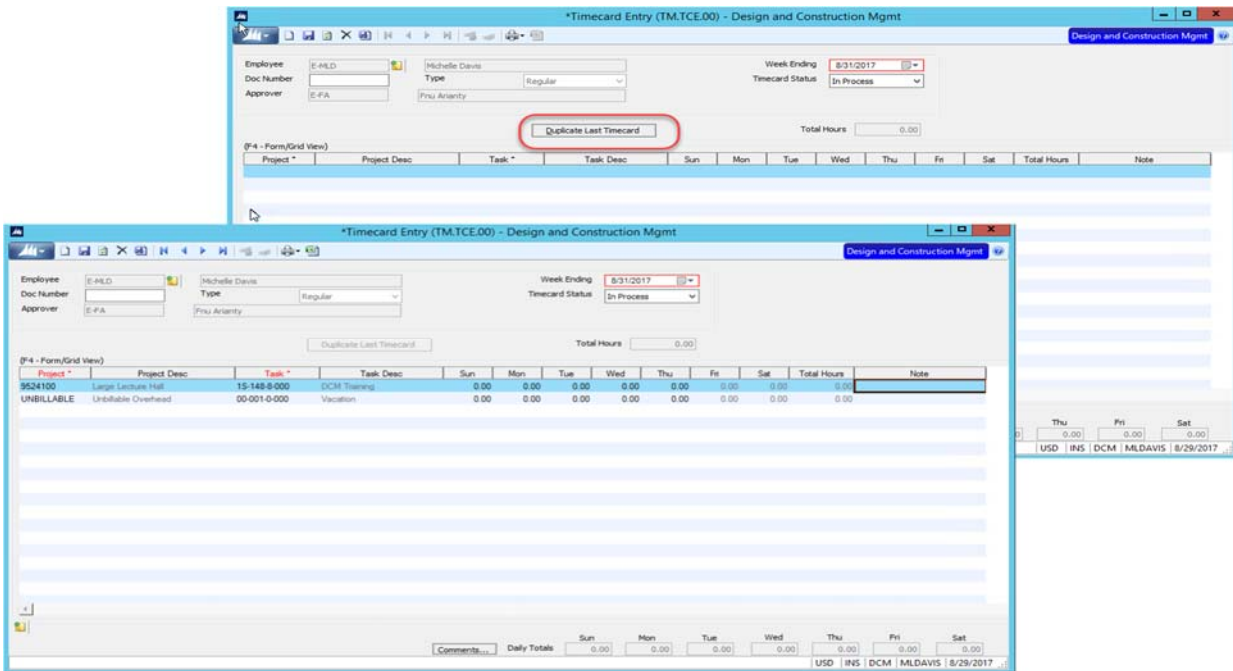
When your timecard is complete, change the timecard status from **“In Process”** to **“Completed”** and

then save.



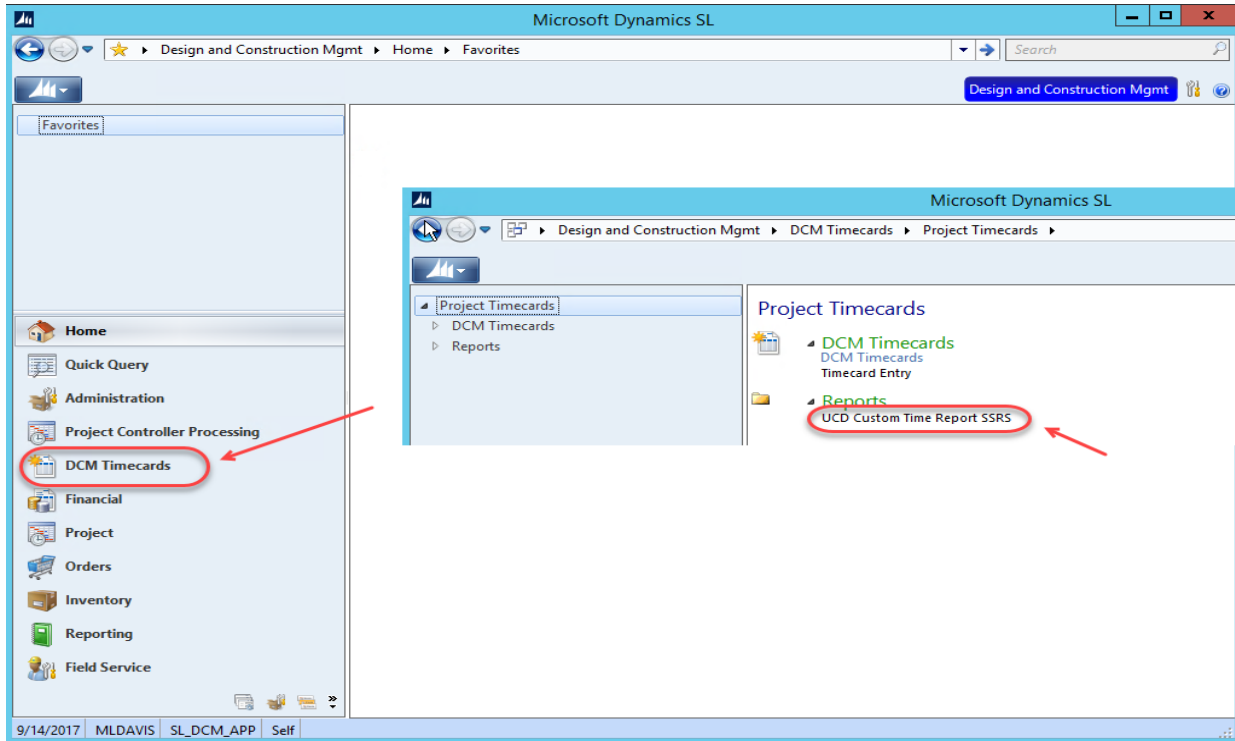
## Duplicating a Timecard

Open a new timecard or if you are already in the timecard entry screen click the  icon for new, select a date for the timecard and tab through the **“Week Ending”** field and click on the **“Duplicate Last Timecard”** button. The projects and tasks from the previous timecard will be copied to your new timecard. Please note: that the hours do not copy from the previous timecard, you will need to enter those.

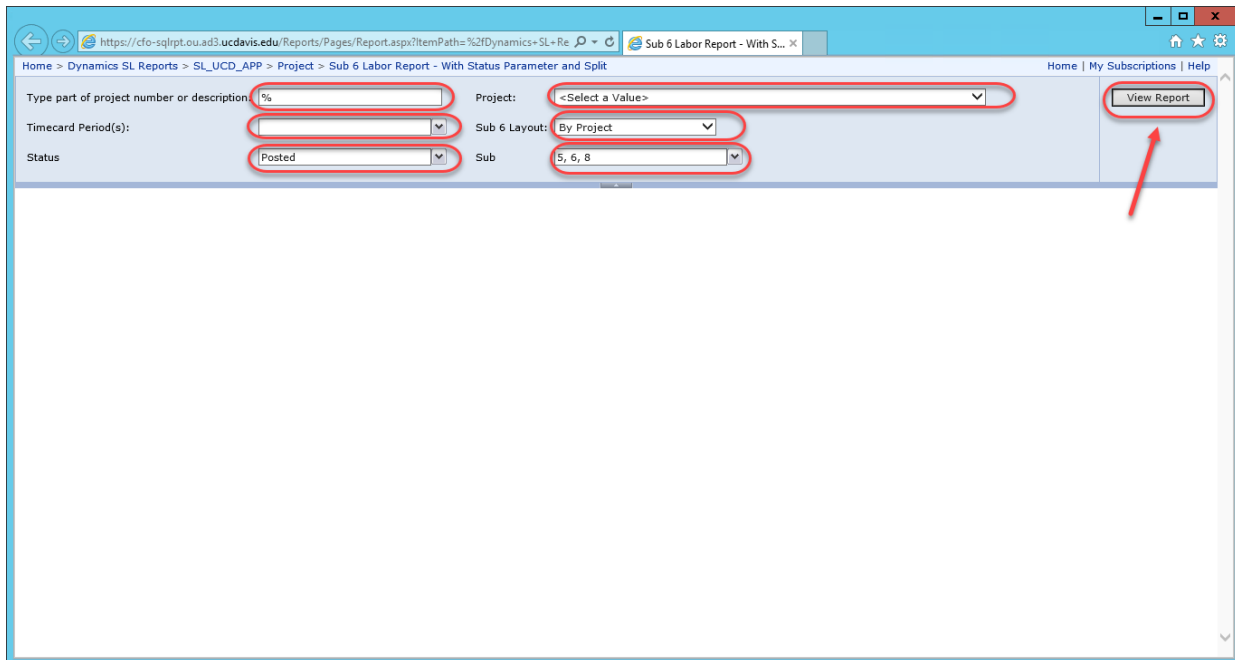


## View Labor Report

On the Dynamics SL Menu. Click once on **“DCM Timecards”**, then click once on **“UCD Custom Time Report SSRS”**.



A new screen will open up in internet explorer, select your parameters and click on the **“View Report”** button.





This is the output of your report.

The screenshot shows a web browser window with the URL <https://cfo-sqlrpt.ou.ad3.ucdavis.edu/Reports/Pages/Report.aspx?ItemPath=%2FDynamics+SL+Re>. The page title is "Sub 6 Labor Report - With S...". The report is titled "SUB 6 LABOR REPORT By Project" and is filtered for project "9524100 - Large Lecture Hall" and time period "201709 - 8/20/2017 - 9/16/2017". The status is "Posted" and the sub is "6".

Project	Hours	Sub	Rate	Charge	Labor Budget Class	Status
<b>9524100 Large Lecture Hall</b>						
<i>August 2017</i>						
08 8/26/2017 Art Timm	15.00	6	\$163.00	\$2,445.00	Major Cap	P
08 8/26/2017 Debra Smith	36.00	6	\$163.00	\$5,868.00	Major Cap	P
08 8/26/2017 Eric Meyer	3.45	6	\$163.00	\$562.35	Inspection	P
08 8/26/2017 Karen Glover	25.00	6	\$123.00	\$3,075.00	Project Coordination	P
08 8/26/2017 Michael Hiett	7.50	6	\$163.00	\$1,222.50	Inspection	P
08 8/26/2017 Phil Haman	3.60	6	\$163.00	\$586.80	Inspection	P
08 8/26/2017 Valentin Gheorghita	5.00	6	\$163.00	\$815.00	Engineering and Commissioning	P
For This Period:		95.55		<b>\$14,574.65</b>		
<i>September 2017</i>						
09 9/9/2017 Art Timm	6.00	6	\$163.00	\$978.00	Major Cap	P
09 9/16/2017 Brian Jones	0.60	6	\$163.00	\$97.80	Inspection	P
09 9/2/2017 Debra Smith	42.50	6	\$163.00	\$6,927.50	Major Cap	P
09 9/9/2017 Eric Meyer	3.45	6	\$163.00	\$562.35	Inspection	P

That's it.....you've completed creating a Timecard!

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