Effort Tracking in ServiceLink

Overview

This document details the steps for tracking work effort in ServiceLink. Effort is entered against each specific LT Work order and BOM Multi. However, when the information is sent to Pinnacle, it is rolled up into a total effort for both the BOM and the LT Work Order.

Navigation

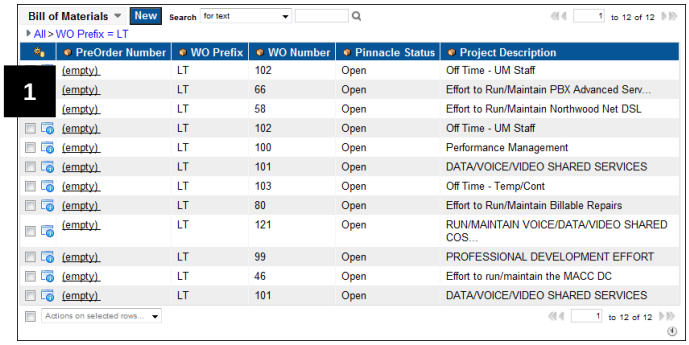
The Effort Tracking application is located in the ServiceLink application bar on the left side of the window. It contains the following modules:

- **All**: View all LTs
- **My Time Cards – Pending**: View the time cards you have entered that have not yet been processed.
- **My Time Cards - Submitted**: View the time cards you have entered that have been submitted for billing.
- **My Time Cards – Billed:** View your time cards that have been billed.

Entering LT Effort

In addition to entering time spent on BOMs, your time needs to be entered on LTs each week. This time is mapped to Planview. To see a list of LTs, click **All** in the **Effort Tracking** application.

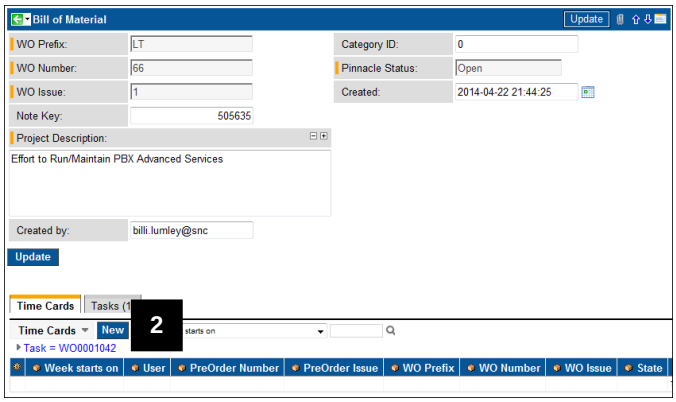
Effort Tracking



PreOrder Number	WO Prefix	WO Number	Pinnacle Status	Project Description
(empty)	LT	102	Open	Off Time - UM Staff
(empty)	LT	66	Open	Effort to Run/Maintain PBX Advanced Serv...
(empty)	LT	58	Open	Effort to Run/Maintain Northwood Net DSL
(empty)	LT	102	Open	Off Time - UM Staff
(empty)	LT	100	Open	Performance Management
(empty)	LT	101	Open	DATA/VOICE/VIDEO SHARED SERVICES
(empty)	LT	103	Open	Off Time - Temp/Cont
(empty)	LT	80	Open	Effort to Run/Maintain Billable Repairs
(empty)	LT	121	Open	RUN/MAINTAIN VOICE/DATA/VIDEO SHARED COS...
(empty)	LT	99	Open	PROFESSIONAL DEVELOPMENT EFFORT
(empty)	LT	46	Open	Effort to run/maintain the MACC DC
(empty)	LT	101	Open	DATA/VOICE/VIDEO SHARED SERVICES

1. Click the **PreOrder Number** for the appropriate project.

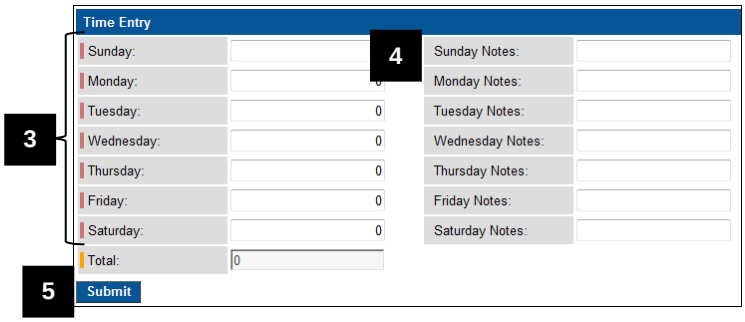
LT page



2. Click **New** on the **Time Cards** tab.

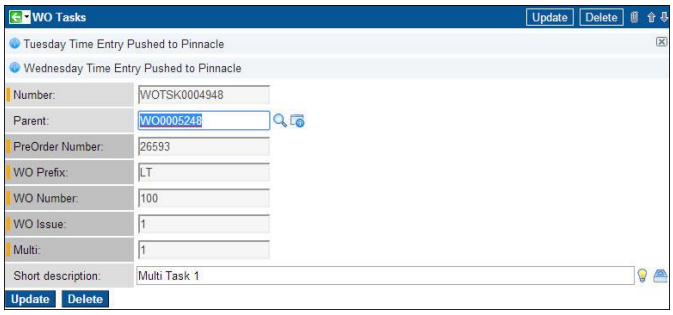
Note: If you already have a time card on the LT, click the time card to open it.

Time Card



3. Enter the hours you worked in the appropriate days.
4. (optional) Enter any notes about a day's time entry.
5. Click **Submit**.

Time Card



Note: Users will see a confirmation message at the top of the time card when the time card has been successfully submitted.

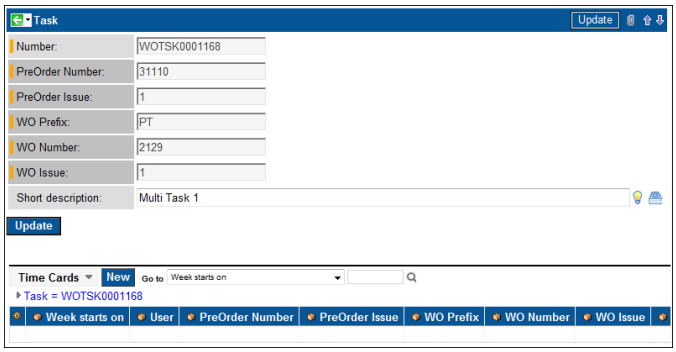
Entering Effort on BOMs

Before entering effort on a project, search for the BOM in ServiceLink and open the record. Make sure you are opening the correct Multi.

Bill of Material form

1. Click on the Task **Number** to open the task.

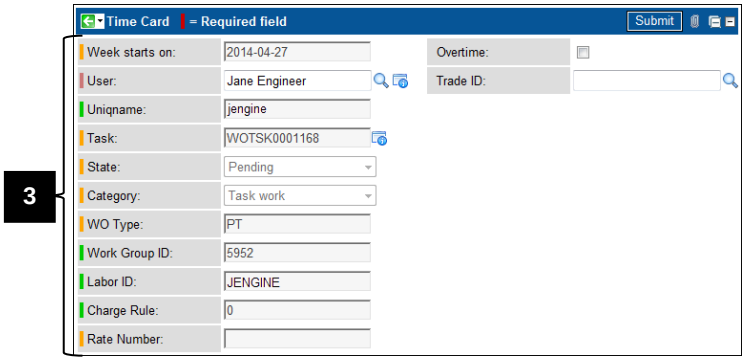
Task page



2. Click **New** in the **Time Cards** section.

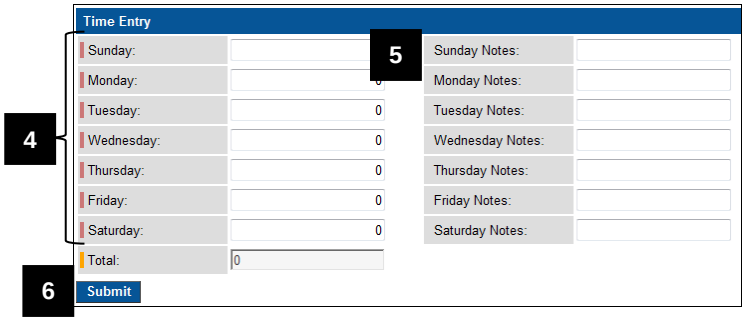
Note: If you already have a time card on the BOM, click the time card to open it.

Time Card



3. Review/Update the **Time Card** information as needed.

Time Card (continued)

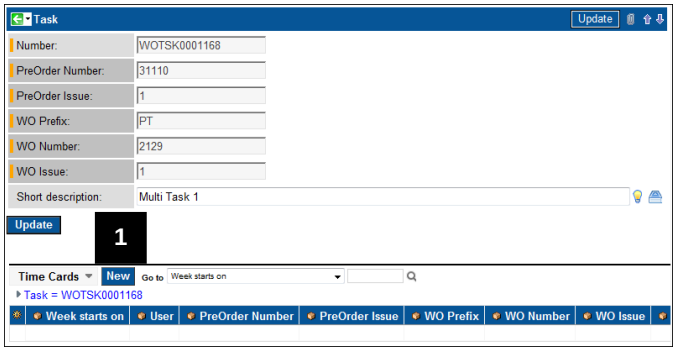


4. Enter the hours you worked in the appropriate days.
5. (optional) Enter any notes about a day's time entry.
6. Click **Submit**.

Entering Overtime

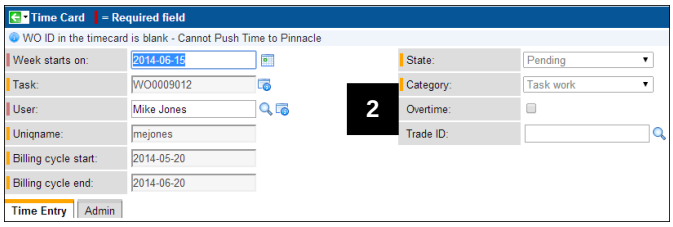
Any overtime is tracked in a separate time card. If you have overtime in any given week, you should have a regular time card and an overtime time card.

BOM



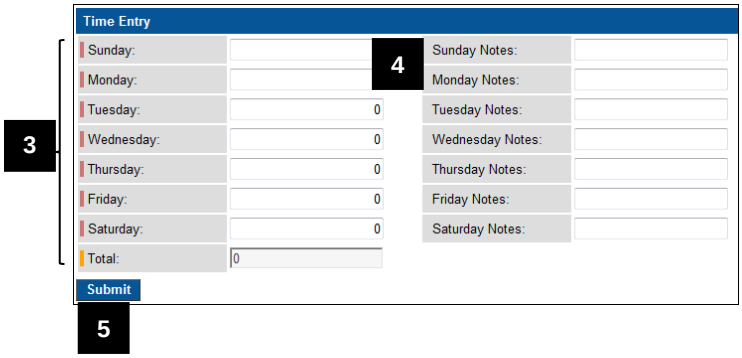
1. Click New in the Time Cards section.

Time Card



2. Click to check the Overtime checkbox.

Time Card



3. Enter the hours you worked in the appropriate days.
4. (optional) Enter any notes about a day's time entry.
5. Click **Submit**.