Posting timecards

Overview

Use the **Time Card** screen to check timecards against timecard rules and to post them to transactions. Posting handles labor, equipment, material and service time.

- **Validate timecard rules** checks the timecards that match the grid filter against the rules you choose. It does not post them.
- **Post timecard records** posts the timecards that match the grid filter to transactions, after you choose rules in **User Rules Selection**.

If a timecard fails, the **Posting Errors** window lists it. If timecards post but some equipment readings are held, a window opens where you correct and post the held readings.

Before you begin

- Sign in to IRIS10 and open the **Time Card** screen at `/cas/timecard`.
- Make sure you have the access level you need:
  - **2 - Read/Write** to validate from the **Validate timecard rules** toolbar button.
  - **4 - Can Post** to post, or to use the **Options** menu items.

  Administrators assign these levels. See Security Administration: access levels by user.
- Know how to filter a grid. Validate and post act on the grid's current filter. See Grid filters.

> **Important:** Validate and post include every timecard that matches the grid's current filter, not only the rows you selected. Filter the grid before you click **Ok**.

Procedure

Filter the grid to the timecards you want to process

1. Open the **Time Card** screen and apply a grid filter or search that leaves only the timecards you want to validate or post.

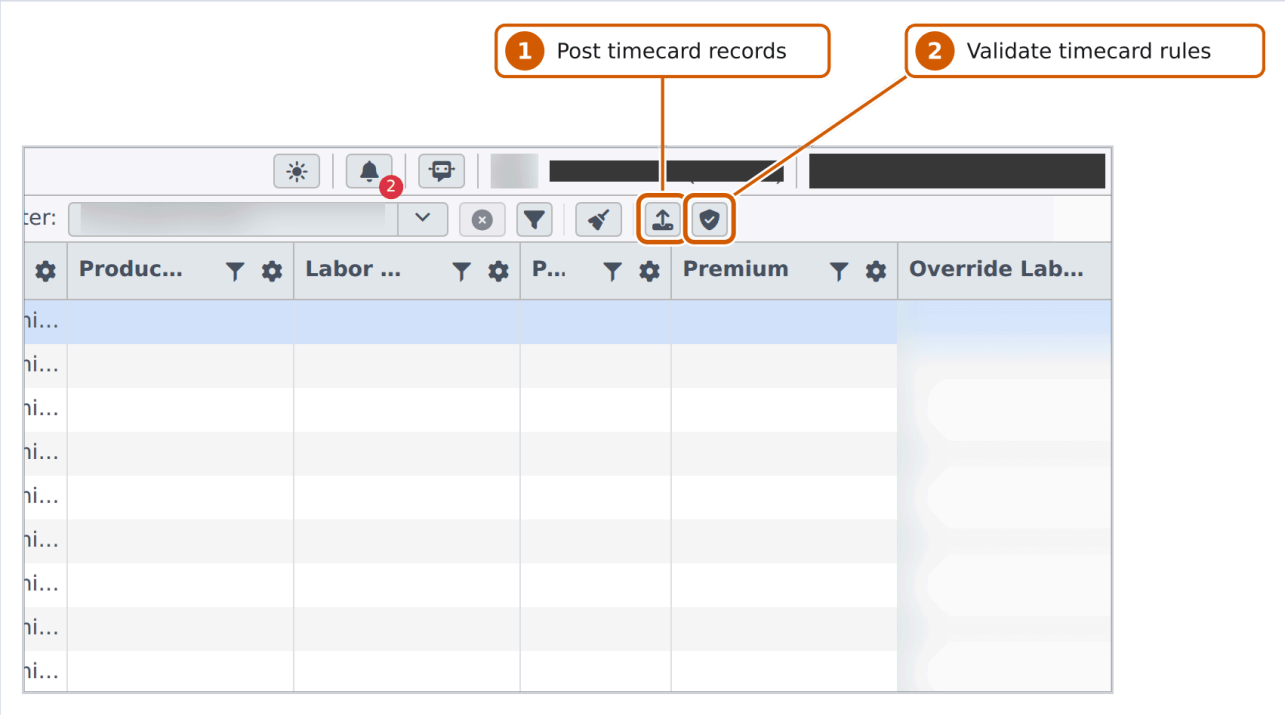
   The grid shows only the timecards you mean to process. Validate and post include every timecard that matches this filter, whether or not the row is selected.

Validate timecards without posting

1. Filter the grid to the timecards you want to check.
2. On the toolbar, click **Validate timecard rules**.

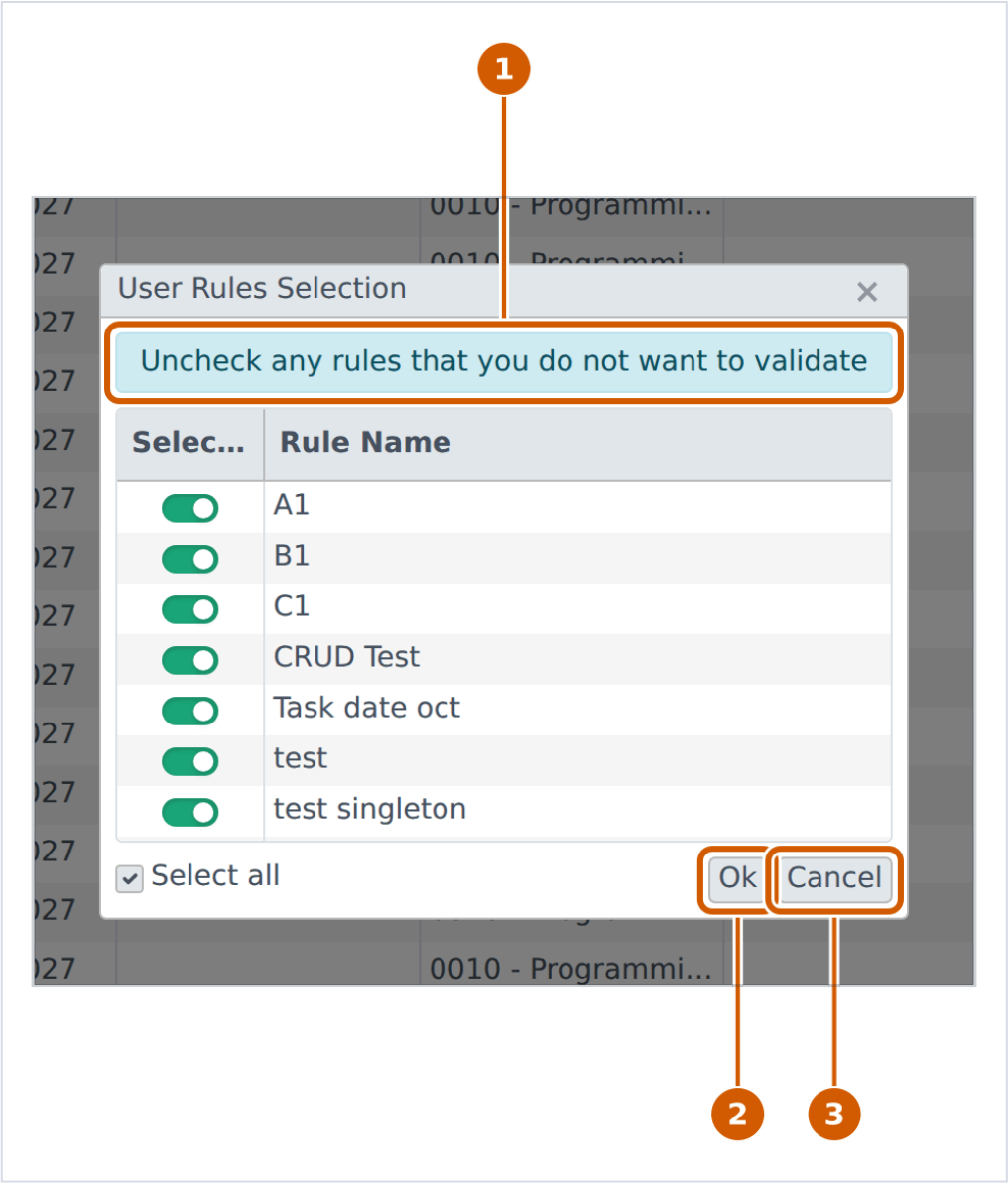
   The **User Rules Selection** window opens with the heading "Uncheck any rules that you do not want to validate".

> **Note:** The **Validate timecard rules** toolbar button needs **2 - Read/Write**. The **Options** menu item **Validate Timecard Records** needs **4 - Can Post**, so level-2 users validate from the toolbar button.



The Time Card toolbar's Validate timecard rules button checks timecards. Its Post timecard records button posts them.

1. Post timecard records: Needs 4 - Can Post
2. Validate timecard rules: Needs 2 - Read/Write



The User Rules Selection window after Validate timecard rules. Clicking Ok starts validation. Nothing is posted.

1. Uncheck any rules that you do not want to validate
2. Ok starts validation
3. Cancel

3. In the grid, clear the **Selected** switch for any rule you do not want to check.

   Only the rules you want to check stay selected.

   > **Note: Select all** is checked by default. Use it to check or clear every rule at once. For more about the rules, see Timecard rules.

4. Click **Ok**.

   The window closes and validation starts at once while a loading indicator shows. No timecards are posted.

5. Read the result.

   If no problems are found, the message "All timecard records validated successfully." appears. If any timecard fails, the **Posting Errors** window opens. The grid then refreshes. Validation does not send a notification.

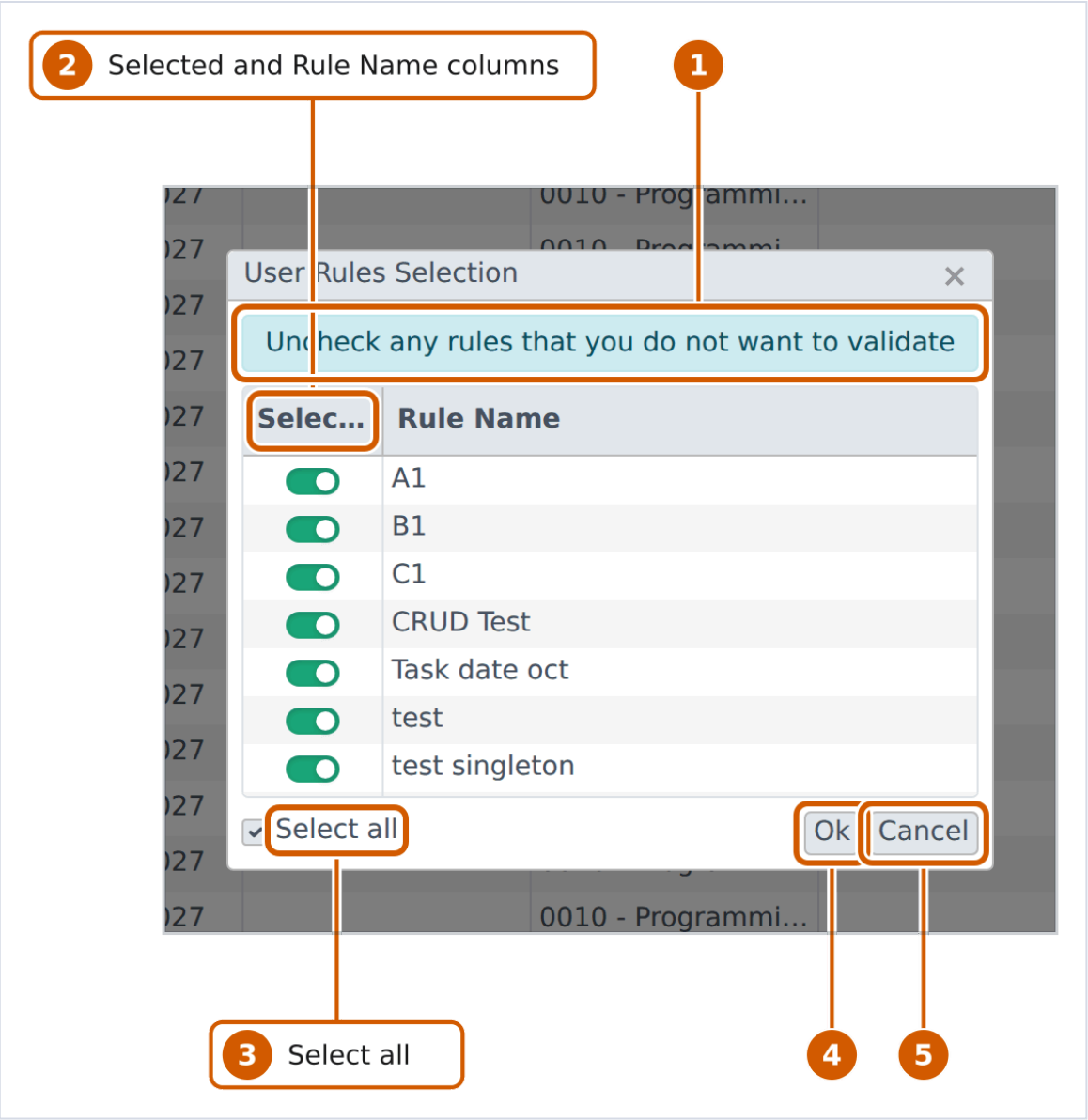
Post timecards

1. Filter the grid so it holds only the timecards you want to post.

   Every timecard that matches the filter will be posted, not only selected rows.
2. On the toolbar, click **Post timecard records**.

   The **User Rules Selection** window opens.

   > **Note:** You can also choose **Options** > **Post Timecard Records**. Posting needs **4 - Can Post**. If you have a lower level and try to post, the message "You do not have sufficient access level to perform this action." appears.



The User Rules Selection window after Post timecard records. Clicking Ok starts the post at once, with no second confirmation.

1. Uncheck any rules that you do not want to validate
2. Selected and Rule Name columns
3. Select all: Checked by default
4. Ok starts the post
5. Cancel: Shows Posting canceled.

3. Review the rules in the grid, and clear the **Selected** switch for any rule you do not want to apply.

   Only the rules you want to apply stay selected.

4. Click **Ok** to start the post.

   The post starts at once. There is no second confirmation.

> **Note:** To stop instead, click **Cancel** or close the window. "Posting canceled." appears and nothing is posted.

5. Wait for the loading indicator to close.

   The post has finished running.
6. Read the result.
   - If every timecard posts, the message "All timecard records posted to transaction successfully." appears.
   - If any timecard fails, the **Posting Errors** window opens.
   - If timecards post but some equipment readings are held, the held equipment readings window opens instead of the success message.

   The grid then refreshes. Posted timecards leave the grid and failed timecards stay on it.
7. Check your notifications for the result of the post.

   A **Timecard post** notification reports whether the post finished with no errors, finished with errors, did not finish, or lost contact. See Notifications.

Fix posting errors and post again

1. In the **Posting Errors** window, read each entry under "Timecard posting errors:".

   Each entry shows **Employee:**, **Task Date:** and **Error:**. For non-labor lines, such as equipment or material, the **Employee:** value shows that line's name.
2. To keep a copy of the errors, click **Export CSV**, **Export PDF** or **Export JSON**.

   A file named `timecard-posting-errors-<date>` is downloaded.
3. Click **Return to grid**.

   The window closes. Timecards that failed stay on the grid, each with its error message saved.
4. Correct the timecards on the grid. See Grid viewing and editing.
5. Filter the grid again if needed.

   The grid holds the timecards you want to process.
6. Validate or post again.

   Validation clears the old error message on the timecards it checks before it checks them again.

Correct and post held equipment readings

1. When the held equipment readings window opens after a post, read the summary.

   The summary reads "Timecards posted successfully. N equipment reading(s) could not be posted. Correct the values below and post them to reading history."
2. Check the **Reason Held** column for each row.

   The column shows why the reading was held.
3. Correct the **Hours** or **Miles** value in each row.

   A row's **Hours** or **Miles** cell can be edited only if that row has that meter value.

4. Click **Post readings**.

   A message asks "You are about to post N equipment reading(s) to reading history. Continue?" If a column filter hides some rows, the message warns that all rows will be posted, including hidden ones.
5. Click **Yes** to post the readings.

   If no readings are still held, the window closes with "Equipment readings posted to reading history successfully." If some are still held, the grid reloads with them and shows "N equipment reading(s) are still held. Check the reason on each row." A **Held equipment reading post** notification is sent.

To leave without posting:

1. Click **Cancel**.

   A message asks "These readings will stay held and will not post. Close anyway?"
2. Click **Yes**.

   The window closes. The readings stay held.

Reference

Access levels by entry point

ENTRY POINT	WHERE	LEVEL NEEDED
Validate timecard rules	Toolbar button	2 - Read/Write
Validate Timecard Records	**Options** menu	4 - Can Post
Post timecard records	Toolbar button	4 - Can Post
Post Timecard Records	**Options** menu	4 - Can Post

User Rules Selection window

CONTROL	WHAT IT DOES
Selected (switch)	Includes or excludes the rule in this run
Rule Name	Name of the timecard rule (read only)
Select all	Checked by default. Checks or clears every rule.
Ok	Use the selected rules for posting and validation. Starts the run at once.
Cancel	Cancel the current posting operation. Shows "Posting canceled."

What validation checks before posting

CHECK	WHAT HAPPENS
Fiscal period	A missing or out-of-range fiscal period is filled in from the timecard's task date

CHECK	WHAT HAPPENS
Billable project	Flags labor timecards on a billable project that have no billing option set: "A referenced Project is marked as billable, but some or all billing options have not been set."
Negative inventory	Flags issues that would make an item go negative where negative quantity is not allowed: "Posting this Inventory Quantity will cause Inventory to go negative."
Quantity too large	Flags material quantities that would push inventory location quantity too high ("Record could not be posted because the Quantity is too large...")
Timecard rules	A timecard that breaks a selected rule gets the rule's name as its error message. Incomplete rules are skipped.

How a timecard line posts

For more on inventory, see Posting inventory.

LINE HAS	POSTED AS	INVENTORY EFFECT
A pay type	Labor	None
Nonzero equipment quantity	Equipment (hour and mile readings are checked before they reach reading history)	None
Nonzero material quantity, stock inventory location	Material	Positive quantity is issued (Timecard Issue). Negative quantity is received back (Timecard Receipt).
Nonzero material quantity, no inventory location	Material (non-stock)	On-hand quantity does not change
Nonzero outside service quantity	Service	None
All quantities zero, no pay type	Other	None

Posting Errors window

ITEM	DESCRIPTION
Heading	Timecard posting errors:
Entry fields	**Employee:**, **Task Date:**, **Error:**
Export CSV / **Export PDF** / **Export JSON**	Exports the errors. File name `timecard-posting-errors-<date>`.
Return to grid	Return to the data grid to continue editing. Closes the window.

Held equipment readings grid

COLUMN	NOTES
Equipment	Read only
Reading Date	`MM/dd/yyyy`
Hours	Editable only if the row has an hours value
Miles	Editable only if the row has a miles value
Rollover Ceiling	Shown for reference
Reason Held	Why the reading was held

Messages you may see

MESSAGE	WHEN
All timecard records validated successfully.	Validation found no errors
All timecard records posted to transaction successfully.	Every timecard posted
Posting canceled.	**User Rules Selection** was cancelled or closed
You do not have sufficient access level to perform this action.	You tried to post without **4 - Can Post**
Unable to post timecards due to a technical error. Please contact support.	The post did not report success
Unable to post timecards due to a technical error. An email has been sent to support.	A technical error occurred and support was told
The posting request could not be completed. IRIS Support has been notified. Refresh the screen to see which records posted.	The request failed on the server. Some records may have posted.
This timecard line could not be posted. IRIS Support has been notified.	A timecard line failed for a technical reason (shown in the **Posting Errors** window)
This material line could not be posted. Check the material and inventory location fields, then post again.	A material line has an inventory location problem
You can not affect a tenant you are not logged into	You are not signed in to the agency whose timecards you tried to post

Post Timecards notifications

NOTIFICATION	SENT WHEN
Timecard post / Timecards posted	A timecard post you ran finishes (not sent for validation)
Held equipment reading post / Held equipment readings posted	A held equipment reading post you ran finishes
`<Operation>` finished with no errors.	No record returned an error

NOTIFICATION	SENT WHEN
`<Operation>` finished, but one or more records returned errors. The errors were listed on the screen when it finished.	Some timecards or readings returned errors
`<Operation>` did not finish. Try again or contact support.	The operation failed
Lost-contact message	Contact was lost. The operation may still have finished.

Tips and notes

Important: Clicking **Ok** in **User Rules Selection** after **Post timecard records** starts the post at once. There is no second confirmation.

Tip: Users with **2 - Read/Write** can check timecards with the **Validate timecard rules** toolbar button. The **Options** menu items need **4 - Can Post**.

Note: Validation does not post, but it can fill in a missing or out-of-range fiscal period on the timecards it checks, using each timecard's task date. See Units of measure, fiscal years and organizations.

Note: Each timecard posts on its own. If any part of a timecard fails, none of its transactions are kept and the timecard stays on the grid with its error message. Other timecards in the same run can still post.

Note: Posted timecards leave the **Time Card** grid and appear as transactions on the **Transact** screen. Transactions from one post share a batch number. See Transactions: void, reinstate and export.

Note: Post readings posts every row in the held readings grid, including rows that a column filter hides. The confirmation message warns you when rows are hidden.

Tip: If you see "Refresh the screen to see which records posted.", refresh the **Time Card** screen before you post again. Timecards that posted will no longer be on the grid.

Related topics

- Grid filters
- Timecard rules
- Notifications
- Grid viewing and editing
- Security Administration: access levels by user
- Transactions: void, reinstate and export
- Posting inventory

- Units of measure, fiscal years and organizations