Timecard rules

Overview

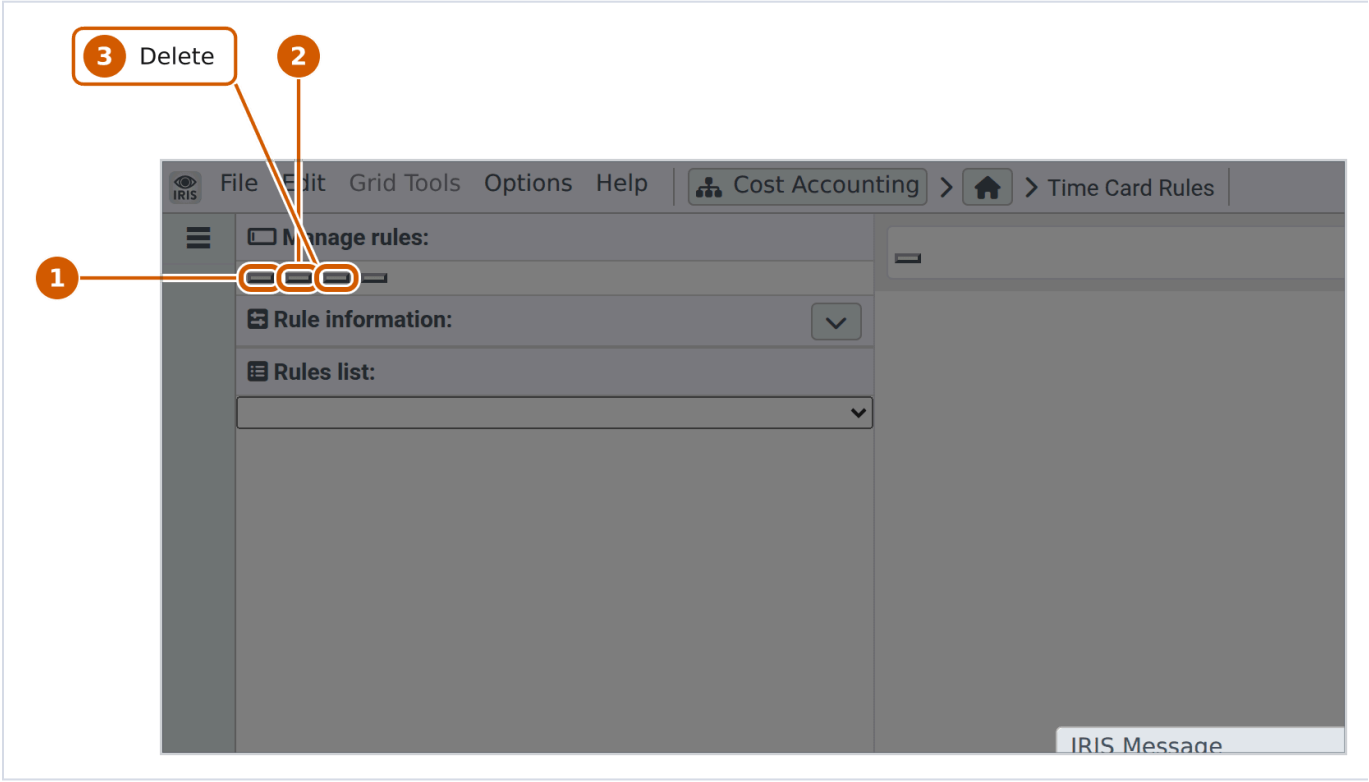
The **Time Card Rules** screen holds the user rules that IRIS10 uses when timecards are validated or posted. Each rule has two parts:

- **When** conditions, which pick the timecards the rule applies to.
- **Apply** checks.

Only rules marked **Active** are applied when you validate or post, even if they are checked in the **User Rules Selection** window.

The screen has the following layout:

- The rule management buttons and the rules list are on the left.
- A collapsible rule information panel (**Name:**, **Active**, **Description:**) is on the right.
- Two row editors are on the right. The top editor holds the **When** conditions and the bottom editor holds the **Apply** checks.



The Time Card Rules screen. Save, Save as and Delete become available once a rule is valid.

1. **Save**: Creates a new rule, or updates the selected rule.
2. **Save as**: Saves a copy of the selected rule under a new name.
3. **Delete**: Deletes the selected rule at once, with no confirmation.

Before you begin

- Sign in to IRIS10. To reach Cost Accounting screens such as **Time Card Rules**, see Navigating portals and pages.
- Make sure you have access to the **Time Card Rules** screen and the **Time Card** screen. For granting access, see Security Administration: screens, reports, copying and resetting.
- Know how timecard entry and posting work. See Posting timecards.

Procedure

Create a timecard rule

1. Open the **Time Card Rules** screen. The screen opens with the rule management buttons on the left. **Save**, **Save as** and **Delete** are unavailable until a rule is valid.
2. If a rule is selected in the rules list, click **Clear selection** (tooltip "Click to deselect a user rule."). The rule is deselected, **Name:** and **Description:** are emptied, **Active** is checked again, both editors are cleared, the information panel collapses, and **Save**, **Save as** and **Delete** are unavailable.
3. In the top editor (the **When** conditions), click the add-row button (tooltip "Click to add new row item."). A new row is added. Because no rule is selected, the rule information panel opens.
4. In the new row, choose the column.
5. In the same row, choose the operator.
6. In the same row, enter the value. If the operator needs a second value, enter it too.
7. To combine several rows, use AND/OR and grouping.
8. In the bottom editor (the **Apply** checks), click the add-row button (tooltip "Click to add new row item."). A new row is added.
9. In the new **Apply** row, choose the column.
10. In the same row, choose the operator.
11. In the same row, enter the value. If the operator needs a second value, enter it too.
12. In the rule information panel, type a name in **Name:**. **Name:** is required.
13. Type a description in **Description:**. **Description:** is required.
14. Leave **Active** checked if you want the rule applied. Clear it to keep the rule without applying it.
15. Click **Save** (tooltip "Click to save a user rule."). **Save** is available only when the information panel is complete and both editors have at least one valid row. The rule is created, the message `The user rule was successfully created.` appears for 3 seconds, and the new rule is selected in the rules list.

Change an existing rule

1. In the rules list, click the rule you want to change. The rule's name, **Active** setting, description, **When** rows and **Apply** rows load into the screen. If the rule is valid, the

information panel opens.
2. Change the **When** rows, the **Apply** rows, the name, the description or the **Active** setting.
3. Click **Save** (tooltip "Click to save a user rule."). The selected rule is updated, the message `The user rule was successfully updated.` appears, and the rule stays selected.

Copy a rule with Save as

1. In the rules list, click the rule you want to copy. The rule loads. When it is valid, **Save as** is available.
2. Click **Save as** (tooltip "Click to save a copy of an existing user rule."). The **User Rule - Save As** window opens. The **Rule name:** box holds the current name followed by a space and `(1)`.
3. Type a unique name in **Rule name:**.
4. Click **Save as** in the window. The window closes, a new rule is created under the new name, and the message `The user rule was successfully created.` appears. If the name is already in use, the message `Please enter a unique name for the rule.` appears. Click **OK** to return to the **Save As** window.
5. To stop without copying, click **Cancel** in the window. The window closes and the original rule name is restored in **Name:**.

Delete a rule

> **Important: Delete** removes the selected rule immediately. There is no confirmation prompt. Make sure the right rule is selected before you click **Delete**.

1. In the rules list, click the rule you want to delete. The rule loads and **Delete** is available.
2. Click **Delete** (tooltip "Click to delete the current selected user rule."). The system deletes the rule at once, with no confirmation. The message `The user rule was successfully deleted.` appears, the rules list reloads, and the selection and editors are cleared.

Choose rules when validating or posting timecards

1. On the **Time Card** screen toolbar, click **Validate timecard rules** or **Post timecard records**. Alternatively, choose **Validate Timecard Records** or **Post Timecard Records** from the **Options** menu. The **User Rules Selection** window opens with the banner "Uncheck any rules that you do not want to validate". It lists the timecard rules by **Rule Name**, and every rule starts checked.
2. In the **Selected** column, turn off the switch for each rule you do not want to use. Rules you turn off are not used for this run.
3. To check or uncheck all rules at once, click **Select all**. Every rule in the list becomes selected or unselected.
4. Click **Ok** (tooltip "Use the selected rules for posting and validation."). IRIS10 sends the checked rules with the validate or post request. Only checked rules that are also **Active**

are applied.

5. To stop instead, click **Cancel** (tooltip "Cancel the current posting operation.") or close the window. The message `Posting canceled.` appears.

> **Important:** Only rules marked **Active** are applied when timecards are validated or posted. The **User Rules Selection** window lists every rule, including inactive ones, and all of them start checked. Checking an inactive rule there does not apply it.

Reference

Rule management buttons

BUTTON	TOOLTIP	AVAILABLE WHEN
Save	Click to save a user rule.	The rule is valid. Creates a new rule if none is selected, otherwise updates the selected rule.
Save as	Click to save a copy of an existing user rule.	A rule is selected and valid.
Delete	Click to delete the current selected user rule.	A rule is selected and valid. Deletes at once, with no confirmation.
Clear selection	Click to deselect a user rule.	Always.

Rule information fields

FIELD	REQUIRED	DEFAULT
Name:	Yes	Empty
Active	No	Checked
Description:	Yes	Empty

Time Card screen actions

ACTION	BUTTON	OPTIONS MENU ITEM
Validate timecards	**Validate timecard rules**	**Validate Timecard Records**
Post timecards	**Post timecard records**	**Post Timecard Records**

User Rules Selection window

CONTROL	WHAT IT DOES
Selected (switch)	Turns a rule on or off for this run. All rules start checked.
Rule Name	The rule's name. Rules are listed in name order.
Select all	Checks or unchecks every rule. Starts checked.

CONTROL	WHAT IT DOES
Ok	Use the selected rules for posting and validation.
Cancel	Cancel the current posting operation. Shows `Posting canceled.`

Messages

MESSAGE	WHEN IT APPEARS
`The user rule was successfully created.`	After **Save** creates a new rule or **Save as** creates a copy.
`The user rule was successfully updated.`	After **Save** updates the selected rule.
`The user rule was successfully deleted.`	After **Delete**.
`Please enter a unique name for the rule.`	The name is already used by another rule. Click **OK** to return to the **Save As** window.
`Unable to save user rule. An email has been sent to support.`	Saving with no rows in the **When** or **Apply** editor.
`There was an error creating/updating/deleting the user rule. An email has been sent to support.`	Any other failure when saving or deleting.
`Are you sure you want to leave the user rules screen? Any unsaved changes may be lost.`	Leaving the screen with unsaved changes. Choose **Yes** or **No**.
`Posting canceled.`	Closing or canceling the **User Rules Selection** window.

Tips and notes

Note: You can save a rule only when **Name:** and **Description:** are filled in and both the **When** editor and the **Apply** editor have at least one valid row. Until then, **Save**, **Save as** and **Delete** stay unavailable.

Tip: Save as is a quick way to start a new rule from an existing one. The suggested name is the original name followed by `(1)`. Change it to something meaningful.

Note: If you leave the screen with unsaved changes, IRIS10 asks "Are you sure you want to leave the user rules screen? Any unsaved changes may be lost." Choose **No** to stay and save your work.

Tip: Each editor has a button to export its filter ("Click to export the current filter as a JSON file.") and a button to send it to IRIS support ("Click to email the filter to IRIS support."). Use them when you ask support for help with a rule.

Note: If IRIS10 rejects a save or delete, it shows its validation messages, one per line.

Related topics

- Posting timecards
- Navigating portals and pages
- Grid filters
- Cost Accounting screen tools
- Security Administration: screens, reports, copying and resetting