

HP PPM – Time Approvers and Resource Pool Managers

July 8, 2014

Introduction

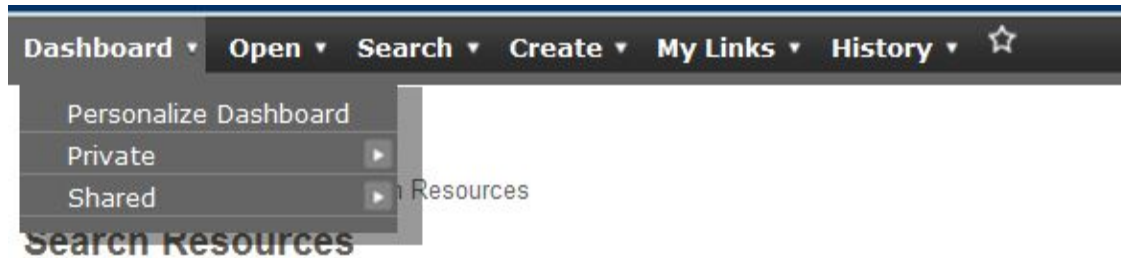
- Workshop will be 2 hours total (1/2 hour instructed)
- Restroom Locations
- Phone calls
- Emergency Evacuation
- Materials (<https://training.it.ufl.edu>)

Typically Time Approvers and Resource Pool Managers are the same person (supervisor). There are typically two portlets that can be added by this person to his Personalized Dashboard that will help them manage these tasks.

Time Approving Portlet

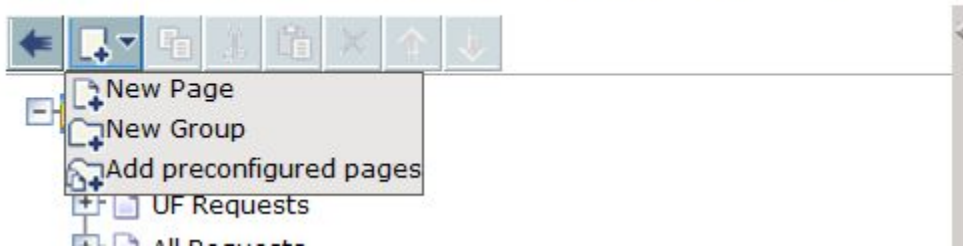
Analyze Assignment Load Portlet

To create or edit your personal page: Dashboard => Personalize Dashboard



Select the “New Page” option

Dashboard - Front Page > Search Resources > Personalize Dashboard



When the Note below appears you can check/uncheck the box and close

Edit page

Note: All changes to the page are automatically saved

Header

*Page Name:

Automatically refresh this page every minutes

Portlet Note:

Add  All changes to the page are automatically saved

Don't show this message again

You can now name the page (typically you can use your first name) and add a portlet

Note: All changes to the page are automatically saved

Preview

Header

*Page Name:

Stephen

Automatically refresh this page every minutes

Portlets

Add Portlets

Select "Add Portlets"

Select "Time Management" from the "Category List", then select "Find Portlets"

Let's start with Time Approver

Add Portlets - Windows Internet Explorer

hp Close Window X

Add Portlets

Search for Portlets to Add

Category: Time Management

Portlet Name:

Find Portlets

Add Cancel

Close Window X

Select “Approve Time Sheets” from the list and then select “Add”

The screenshot shows the 'Add Portlets' dialog box in Internet Explorer. The window title is 'Add Portlets - Windows Internet Explorer'. The HP logo is in the top left, and 'Close Window X' is in the top right. The main heading is 'Add Portlets'. Below it is a search bar labeled 'Search for Portlets to Add'. The 'Category' dropdown is set to 'Time Management'. The 'Portlet Name' field is empty. A 'Find Portlets' button is below the search bar. The 'Select Portlets to Add' section shows 11 results in a table. The 'Approve Time Sheets' portlet is selected with a checked checkbox. The 'Add' button is highlighted with a red arrow.

<input type="checkbox"/>	Portlet Name	Category	Description	Help
<input checked="" type="checkbox"/>	Approve Time Sheets	Time Management	Displays Time Sheets that need approval by the current user.	?
<input type="checkbox"/>	My Tasks	Time Management, Project Management	Displays all Project Tasks currently assigned to you that have a scheduled finish date two weeks from the current date.	?
<input type="checkbox"/>	My Time Sheets	Time Management	Displays the Time Sheets for the user during the last 10 time periods.	?
<input type="checkbox"/>	My Work Items	Time Management	Lists the work items on the user's open time sheets, giving the user a snapshot of items he	?

You can now change the width of the portlet or set the filtering criteria for the portlet.

The screenshot shows a web page editor interface. At the top, it says "Edit page" and "Note: All changes to the page are automatically saved". There is a "Preview" button in the top right. Below this is a "Header" section with a "Page Name" field containing "Front Page" and a checkbox for "Automatically refresh this page every 15 minutes". The main area is labeled "Portlets" and contains an "Add Portlets" button. A single portlet titled "Approve Time Sheets" is visible, with a small control bar on its right side. Two red arrows originate from the text above: one points to the "Approve Time Sheets" portlet, and the other points to the control bar on its right side.


Filtering Criteria


Typically, you do not have to adjust any of the “Filtering Criteria” for Approve-Time since the system will display by default all of the time sheets awaiting your approval. You may however want to set the “Sort” and “Number of Rows Displayed” values


Edit Preferences: Approve Time Sheets (Approve Time Sheets)


Preferences:


* Previous Time Periods to Show:

Resource: 

Manager: 


Org Unit: 

Time Sheet Line Status: 


Show Time Sheets: 

Total Hours Equal or Exceed:

Total Hours Equal or Less Than:

Projects: 

Display preferences summary on portlet:

* Sort By:  Ascending Descending

* Rows Displayed:

* Rows Displayed in Maximized View:

Select Done

We are now going to add another portlet to this page

Resource Pool Manager – Analyze Assignment Load

The screenshot displays a web application interface. At the top is a grey header bar with a small icon and the text "Header". Below the header, there is a form area. It includes a label "*Page Name:" followed by a text input field containing "Front Page". Below that is a checked checkbox labeled "Automatically refresh this page every" followed by a numeric input field containing "15" and the text "minutes".

Below the form area is another grey header bar with a small icon and the text "Portlets". Underneath this bar is a button labeled "Add Portlets". Below the button is a large rectangular area containing a single portlet. The portlet has a title bar with the text "Approve Time Sheets" and standard window control icons (minimize, maximize, close) on the right side.

Select “Add Portlet”

Choose “Resource Management” from the Category list

https://tst-ppm.erp.ufl.edu/?IS_WINDOID=Y&AssetEditMode=Y&pageTitle=Stephen&IS...

hp Close Window X

Add Portlets

Search for Portlets to Add

Category: Resource Management

Portlet Name:

Find Portlets

Add Cancel

Close Window X

Select "Find Portlets", scroll down to "Analyze Assignment Load", check the box, and select "Add".

The screenshot shows a web browser window with the URL `https://tst-ppm.erp.ufl.edu/?IS_WINDOID=Y&AssetEditMode=Y&pageTitle=Stephen&...`. The page title is "Add Portlets". Below the title is a search bar labeled "Search for Portlets to Add". The "Category" dropdown is set to "Resource Management". The "Portlet Name" field is empty. The "Find Portlets" button is highlighted with a red arrow. Below the search bar is a table titled "Select Portlets to Add" with 5 Results. The table has columns for "Portlet Name", "Category", "Description", and "Help". The first row, "Analyze Assignment Load", has its checkbox checked, indicated by a green arrow. The "Add" button at the bottom is highlighted with a grey arrow.

<input type="checkbox"/>	Portlet Name	Category	Description	Help
<input checked="" type="checkbox"/>	Analyze Assignment Load	Resource Management	Analyze Assignment Load Portlet.	?
<input type="checkbox"/>	Analyze Resource Pools	Resource Management	Analyze Resource Pools Portlet	?
<input type="checkbox"/>	Resource Pool List	Resource Management	Resource Pool List Portlet	?
<input type="checkbox"/>	Resource Request Portlet	Resource Management	Resource Requests List Portlet	?
<input type="checkbox"/>	Staffing Profile List	Resource Management	Staffing Profile List Portlet	?

You can now change the width of the portlet or set the filtering criteria for the portlet.

The screenshot displays a web page editor interface. At the top, it says "Edit page" and "Note: All changes to the page are automatically saved". There is a "Preview" button in the top right. Below this is a "Header" section with a "Page Name" field containing "Stephen" and a checkbox for "Automatically refresh this page every" followed by a "minutes" input field. The main area is labeled "Portlets" and contains an "Add Portlets" button. A single portlet titled "Analyze Assignment Load" is visible. In the bottom right corner of this portlet, there are three small icons: a double-headed arrow for width adjustment, a funnel for filtering, and a close button (X).

Filtering – select the filtering icon

Choose the Preferences (criteria) you wish to filter on (typically Resource Pool). Select your resource pool

Choose the Time Period (month or week) and number of periods (typically only future)

Edit Preferences: Change and Release - 12 Months (Analyze Assignment Load)

Preferences

Analyze Capacity from:

Organization Units:

Resource Pool:

Include children resource pools.

Limit capacity against selected resource pools.

Resources Managed By:

Resource Name:

Resources on Project:

Resources with role:

Assignments with Workload Category:

Total Assignment Values for:

Scheduled Effort

Actual Effort

Scheduled and Actual Effort

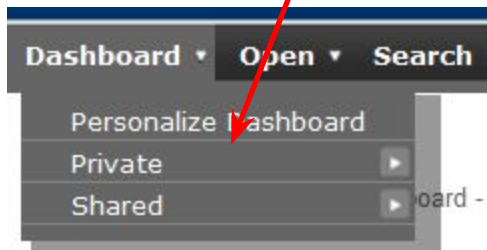
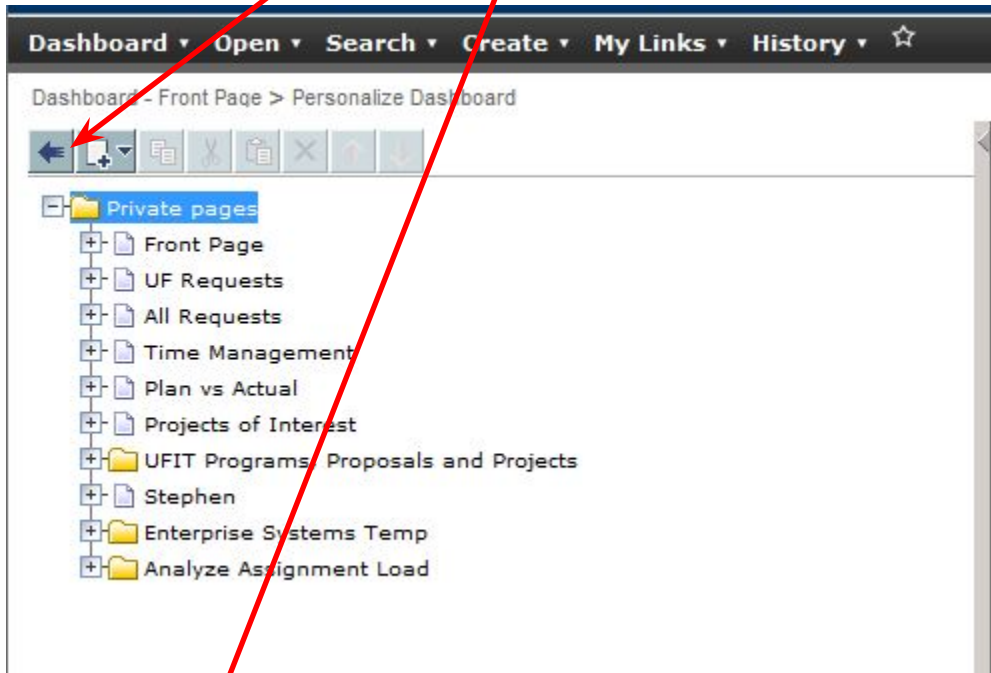
Time Period

Period:

Display: past periods

Display: future periods

Now you can click on the “Back” arrow or after opening any other page, you will find the page you just created under the “Private” selection in “Dashboard”.



Your Time-Approvers portlet should look similar to below

- The “Time to Approve” column indicates how many hours of the “Total Time” you should review for approval
- Check the box on the left will activate the “Approve” button for a single or multiple lines
- Selecting a “Time Period – Time Sheet #” will allow you to review details

Approve Time Sheets

Preferences: Previous Time Period to Show: 12; Time Sheet Line Status: Submitted; Show Time Sheets: Both with...

<input type="checkbox"/>	Resource	Time Period - Time Sheet #	Status	Manager Δ	Time to Approve	Total Time	Approvable Line Costs
<input type="checkbox"/>	Andy Shivers	6/16/14 - 6/22/14 - 1	Submitted	Alan Cook	7 (Hours)	40 (Hours)	\$271.46
<input type="checkbox"/>	Andy Shivers	6/23/14 - 6/29/14 - 1	Submitted	Alan Cook	26 (Hours)	40 (Hours)	\$1,008.28
<input type="checkbox"/>	Andy Shivers	6/30/14 - 7/6/14 - 1	Submitted	Alan Cook	23 (Hours)	40 (Hours)	\$891.94
<input type="checkbox"/>	Carol Cobb	6/16/14 - 6/22/14 - 1	Submitted	Alan Cook	4 (Hours)	44 (Hours)	\$184.36
<input type="checkbox"/>	Carol Cobb	6/23/14 - 6/29/14 - 1	Submitted	Alan Cook	13.5 (Hours)	46.5 (Hours)	\$622.22
<input type="checkbox"/>	Carol Cobb	6/30/14 - 7/6/14 - 1	Submitted	Alan Cook	15.5 (Hours)	41 (Hours)	\$714.40
<input type="checkbox"/>	Daniel Hanson	6/16/14 - 6/22/14 - 1	Submitted	Alan Cook	14 (Hours)	40 (Hours)	\$569.10
<input type="checkbox"/>	Daniel Hanson	6/23/14 - 6/29/14 - 1	Submitted	Alan Cook	17 (Hours)	40 (Hours)	\$691.05
<input type="checkbox"/>	Daniel Hanson	6/30/14 - 7/6/14 - 1	Submitted	Alan Cook	32.5 (Hours)	40 (Hours)	\$1,321.13
<input type="checkbox"/>	Dmitri Vershinin	6/16/14 - 6/22/14 - 1	Submitted	Alan Cook	28 (Hours)	40 (Hours)	\$947.24
<input type="checkbox"/>	Dmitri Vershinin	6/23/14 - 6/29/14 - 1	Submitted	Alan Cook	26 (Hours)	38 (Hours)	\$879.58
<input type="checkbox"/>	Frank Kutch	6/16/14 - 6/22/14 - 1	Submitted	Alan Cook	40 (Hours)	40 (Hours)	\$2,050.40

The items highlighted are the ones being submitted to you for approval. You can individual select and then Approve/Reject or approve all the items from the previous screen

Stephen Cates - Time Sheet for 6/30/14 - 7/6/14 (Pending Approval)

[Copy Time Sheet](#)

[Cancel Time Sheet](#)

Resource: Stephen Cates

Time Period: 6/30/14 to 7/6/14

*Description:

[Add Items](#) [Approvals/Transaction Details](#)

Time Sheet Details (All times shown in hours)

Time Breakdown

Other Actuals

Item	Status	Expected Hours	Mon 6/30	Tue 7/1	Wed 7/2	Thu 7/3	Fri 7/4	Sat 7/5	Sun 7/6	Total
<input type="checkbox"/> Prj: SA - Apply 2012/2013 PeopleSoft Bundles an...	Submitted	119.0	0.00	0.00	0.00	0.50	0.00	0.00	0.00	0.50
<input type="checkbox"/> Enterprise Systems FY2014 Project: 70162										
<input type="checkbox"/> Task: Operational Activity (Enterprise Systems FY2014)	Submitted	800.0	1.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
<input type="checkbox"/> Enterprise Systems Overhead FY2015 Project: 76014										
<input type="checkbox"/> Task: Admin (Enterprise Systems Overhead FY2015)	Submitted	0.0	0.00	1.00	1.00	1.00	0.00	0.00	0.00	3.00
<input type="checkbox"/> Task: Leave (Enterprise Systems Overhead FY2015)	Submitted	0.0	0.00	0.00	0.00	0.00	8.00	0.00	0.00	8.00
<input checked="" type="checkbox"/> Enterprise Systems Run FY2015 Project: 75999										
<input checked="" type="checkbox"/> Task: UFIT Application (Enterprise Systems Run FY2015)	Submitted	0.0	0.00	1.00	2.00	1.00	0.00	0.00	0.00	4.00
<input type="checkbox"/> Overhead FY2014 Project: 70163										
Line Actions:			10.00	9.00	9.00	8.00	8.00	0.00	0.00	44.00

[Line Details](#)

[Remove](#)

[Rework](#)

[Approve](#)

[Reject](#)

Your Resource Managers (Analyze Assignment Load) portlet should look similar to below

- The blue line represents capacity
- The colored bars represent the load on the resources you defined in the filter criteria

Select “View Resource Breakdown” to see more details



Select "Assignment Details" to get even more details

Resource Load Breakdown - Assignment Summary Done

View: Assignment Summary | [Assignment Details](#) Legend: Over-Allocations

Showing workload breakdown for individual resources by Weeks from Jun 2, 2014 to Aug 31, 2014

Resource Name	6/2/14	6/9/14	6/16/14	6/23/14	6/30/14	7/7/14	7/14/14
	Sched	Sched	Sched	Sched	Sched	Sched	Sched
Pamela Bengtson							
Total Capacity	40	40	40	40	32	40	40
Total Assignments	40	40	40	40	31.09	35.91	35.91
Available Capacity	0	0	0	0	0.91	4.09	4.09
Robert Bull							
Total Capacity	40	40	40	40	32	40	40
Total Assignments	39.38	39.38	39.38	39.38	43.84	52.27	52.27
Available Capacity	0.62	0.62	0.62	0.62	(11.84)	(12.27)	(12.27)
Pate Cantrell							
Total Capacity	0	32	40	40	32	40	40
Total Assignments	0	23.5	23.5	23.5	15.14	9.23	9.23
Available Capacity	0	8.5	16.5	16.5	16.86	30.77	30.77
Stephen Cates							
Total Capacity	40	40	40	40	0	32	40
Total Assignments	37.48	37.48	37.48	37.48	0	26.3	28.5

[Export Resource Load Details](#) Done

Capacity Level

Values shown in red represent the load on a resource over 40hrs/week

Resource Load Breakdown - Assignment Details Done

View: [Assignment Summary](#) | Assignment Details Legend: Over-Allocations

Showing workload breakdown for individual resources by Weeks from Jul 7, 2014 to Oct 5, 2014

Resource Name	7/21/14	7/28/14	8/4/14	8/11/14	8/18/14	8/25/14	9/1/14
	Sched	Sched	Sched	Sched	Sched	Sched	Sched
Total Assignments	35.91	36.63	39.52	39.52	39.52	39.52	30.1
Available Capacity	4.09	3.37	0.48	0.48	0.48	0.48	1.9
SP: Enterprise Systems Overhea... (Soft Booked)	1.82	2.22	3.81	3.81	3.81	3.81	1.52
SP: Enterprise Systems Run FY2... (Soft Booked)	34.09	34.42	35.71	35.71	35.71	35.71	28.57
Robert Bull							
Total Capacity	40	40	40	40	40	40	32
Total Assignments	47.95	48.15	48.95	48.95	48.95	48.95	38.64
Available Capacity	(7.95)	(8.15)	(8.95)	(8.95)	(8.95)	(8.95)	(6.64)
SP: Enterprise Systems Overhea... (Soft Booked)	5	5	5	5	5	5	5
SP: Web Content Management (Soft Booked)	1.14	1.15	1.19	1.19	1.19	1.19	0.95
SP: Click Commerce Implementation (Soft Booked)	10	9.6	8	8	8	8	6.4
SP: Enterprise Systems Run FY2... (Soft Booked)	29.55	29.83	30.95	30.95	30.95	30.95	24.76
SP: 74881 - Event Management S... (Soft Booked)	2.27	2.58	3.81	3.81	3.81	3.81	1.52
SP: PA/HR/F/VEP - 9.2 Application ... (Soft Booked)	0	0	0	0	0	0	0

Export Resource Load Details Done

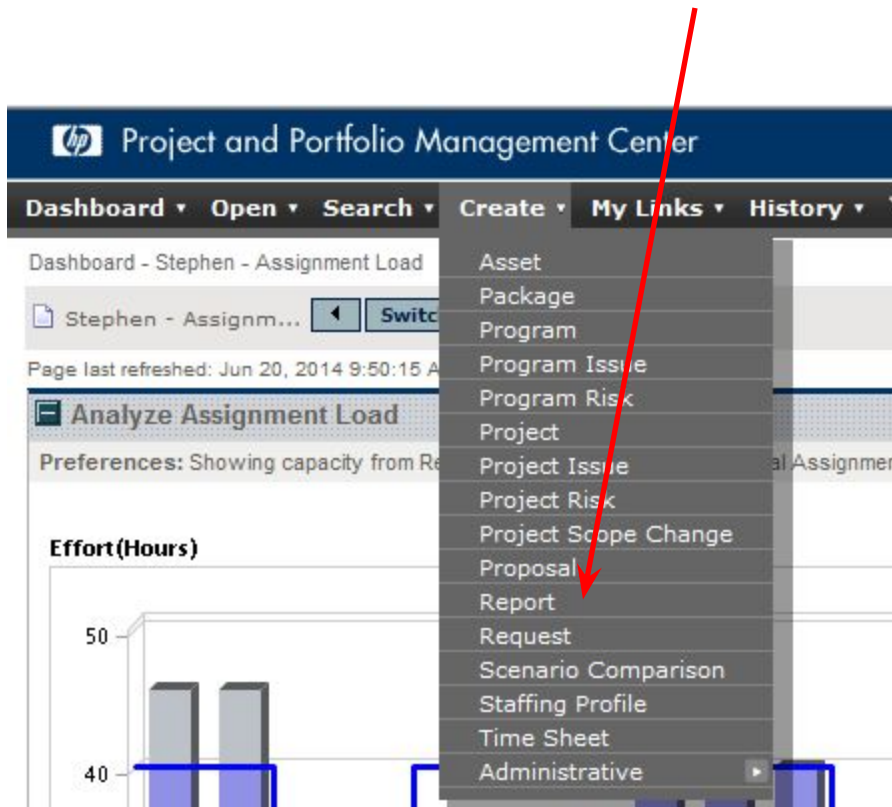
Capacity Level

Similarly you can add additional selections by adding more portlets on your page or create more pages by using the "Personalize Dashboard" selection

Delinquent Time Sheet Report

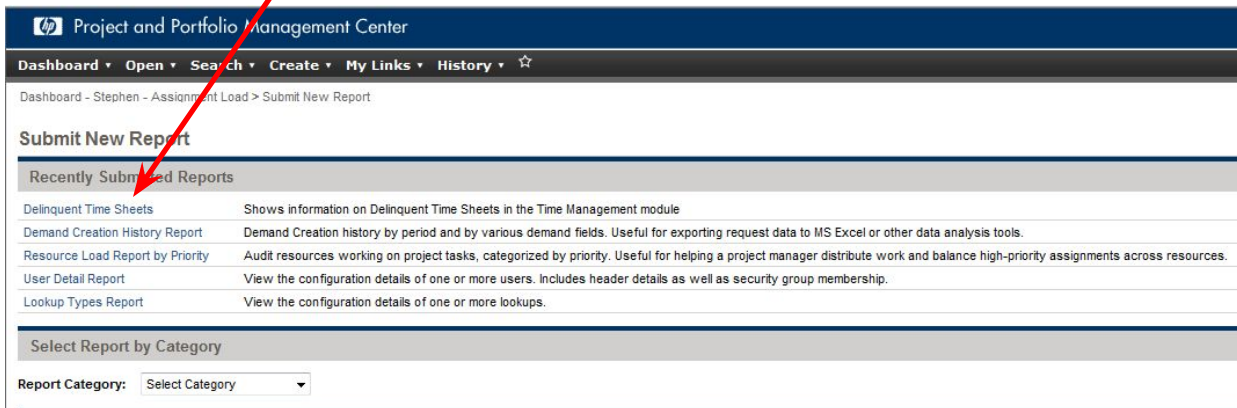
You can request/submit a report to find out who has not submitted a timesheet for this period or for multiple periods for your unit.

Create => Report



The screenshot displays the 'Project and Portfolio Management Center' interface. The top navigation bar includes 'Dashboard', 'Open', 'Search', 'Create', 'My Links', and 'History'. The 'Create' dropdown menu is open, listing various options: Asset, Package, Program, Program Issue, Program Risk, Project, Project Issue, Project Risk, Project Scope Change, Proposal, Report, Request, Scenario Comparison, Staffing Profile, Time Sheet, and Administrative. A red arrow points to the 'Report' option. The background shows a dashboard with a bar chart titled 'Analyze Assignment Load' and a 'Preferences' section.

Select - Delinquent Time Sheet



Project and Portfolio Management Center

Dashboard ▾ Open ▾ Search ▾ Create ▾ My Links ▾ History ▾ ☆

Dashboard - Stephen - Assignment Load > Submit New Report

Submit New Report

Recently Submitted Reports

Delinquent Time Sheets	Shows information on Delinquent Time Sheets in the Time Management module
Demand Creation History Report	Demand Creation history by period and by various demand fields. Useful for exporting request data to MS Excel or other data analysis tools.
Resource Load Report by Priority	Audit resources working on project tasks, categorized by priority. Useful for helping a project manager distribute work and balance high-priority assignments across resources.
User Detail Report	View the configuration details of one or more users. Includes header details as well as security group membership.
Lookup Types Report	View the configuration details of one or more lookups.

Select Report by Category

Report Category:

The default value for the number of periods reviewed is three

You must provide a value for "Grace Period" (typically zero)

You can limit the report to only your unit

Submit Report: Delinquent Time Sheets

Submit Cancel

Report Parameters [Restore Default](#)

*Previous Time Periods to Show:

*Include Current Period: Yes No

*Grace Period in Days (affects past periods only):

Resource:

Direct Manager:

Default Time Approver:

Organization Unit:

Time Sheet Status:

Sort by:

Scheduling and Output Options

Run Report Immediately

Run Report On:

Repeat Every Hours Until

Send email to: when report is finished

Advanced Notifications

Submit Cancel

You can schedule this report to run routinely by configuring the “Schedule and Output Options” section. You can send this report as an email to a list of your choosing (names separated by semi-colon).

Submit Report: Delinquent Time Sheets

Report Parameters

*Previous Time Periods to Show:

*Include Current Period: Yes No

*Grace Period in Days (affects past periods only):

Resource:

Direct Manager:

Default Time Approver:

Organization Unit:

Time Sheet Status:

Sort by:

Scheduling and Output Options

Run Report Immediately

Run Report On:

Repeat Every Weeks Until

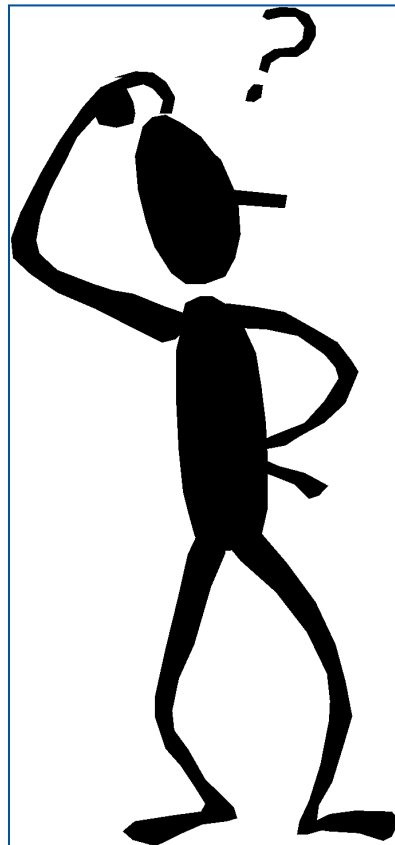
Send email to: when report is finished

Advanced Notifications

Send When	Description	Recipients
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Additional groups can be included with “Add a Notification”

Questions



Effort Reporting – Common Definitions

- ▣ **Project** – Effort to deliver new service or enhance current service. May be grow or transform.
 - **Separately Named** – Chartered and budgeted efforts requiring 80 or more hours
 - **Enhancements** – General grouping of small, not separately budgeted efforts to provide enhancement of current services

- ▣ **Run** – Effort required to support and deliver current service portfolio. Defined by each unit based on activities and/or applications.

- ▣ **Overhead** – Effort not attributable to specific project or service activity
 - **Administration** – Effort required to plan for, manage and administer the IT operation. Examples include strategic planning, campus outreach, staff meetings, staff evaluations, email, etc.
 - **Leave** – Vacation and sick leave
 - **Professional development** – Continuing professional education not attributable to specific project or service

Effort Reporting – Principles for Unit Buckets

- ▣ **Activities meaningful to staff** – Should relate to what person does, for example working on Hyperion support or course development or wireless
- ▣ **Mapping** –Unit director should be able to map activity buckets to service(s)
- ▣ **Right sized** – As simple as possible but should provide enough information to identify effort to service portfolio