

HP PPM – Time Approvers and Resource Pool Managers

July 8, 2014

Introduction

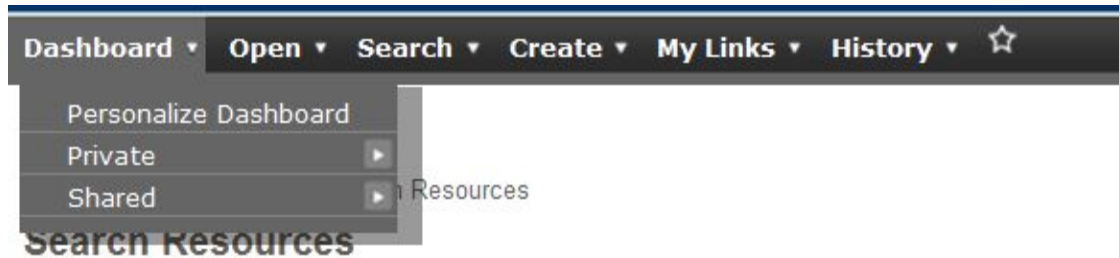
- Workshop will be 2 hours total (½ hour instructed)
- Restroom Locations
- Phone calls
- Emergency Evacuation
- Materials (<https://training.it.ufl.edu>)

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



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:

New Page

☐ Automatically refresh this page every minutes

Portlet

Note:

Add

All changes to the page are automatically saved

☐ Don't show this message again

Close

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

Automatically refresh this page every minutes

Add Portlets - Windows Internet Explorer

hp Close Window X

Add Portlets

Search for Portlets to Add

Category: Time Management

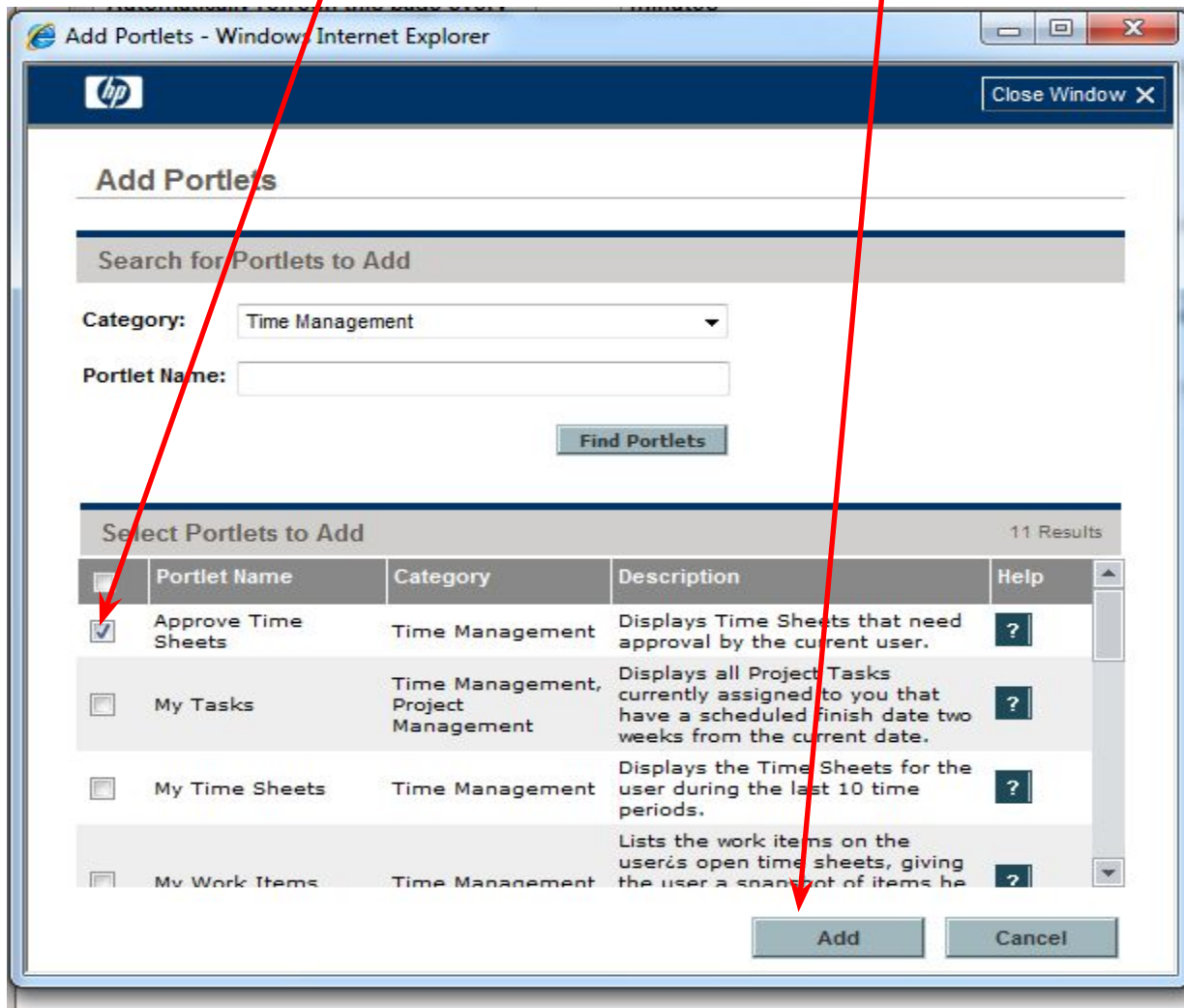
Portlet Name:

Find Portlets

Add Cancel

Close Window X

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



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, there is a header bar with the text "Edit page" on the left and a "Preview" button on the right. Below the header, a note states "Note: All changes to the page are automatically saved". The main content area is divided into two sections: "Header" and "Portlets". The "Header" section contains a "Page Name:" label, a text input field with "Front Page" entered, and a checkbox labeled "Automatically refresh this page every" followed by a "15" minute input field. The "Portlets" section has an "Add Portlets" button. Below this, a portlet titled "Approve Time Sheets" is displayed. Two red arrows originate from the text above: one points to the bottom-right corner of the "Approve Time Sheets" portlet, and the other points to the "15" minute input field in the "Header" section.

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: 12	Show Time Sheets: Both with and without Exceptions ▼
Resource: <input type="text"/>	Total Hours Equal or Exceed: <input type="text"/>
Manager: <input type="text"/>	Total Hours Equal or Less Than: <input type="text"/>
Org Unit: <input type="text"/>	Projects: <input type="text"/>
Time Sheet Line Status: Submitted	
<input checked="" type="checkbox"/> Display preferences summary on portlet:	
* Sort By: Manager ▼	* Rows Displayed: 50
<input checked="" type="radio"/> Ascending <input type="radio"/> Descending	* Rows Displayed in Maximized View: 200

Select Done

We are now going to add another portlet to this page

Resource Pool Manager – Analyze Assignment Load

 Header

*Page Name:


Front Page

☒

 Automatically refresh this page every


15

 minutes

 Portlets

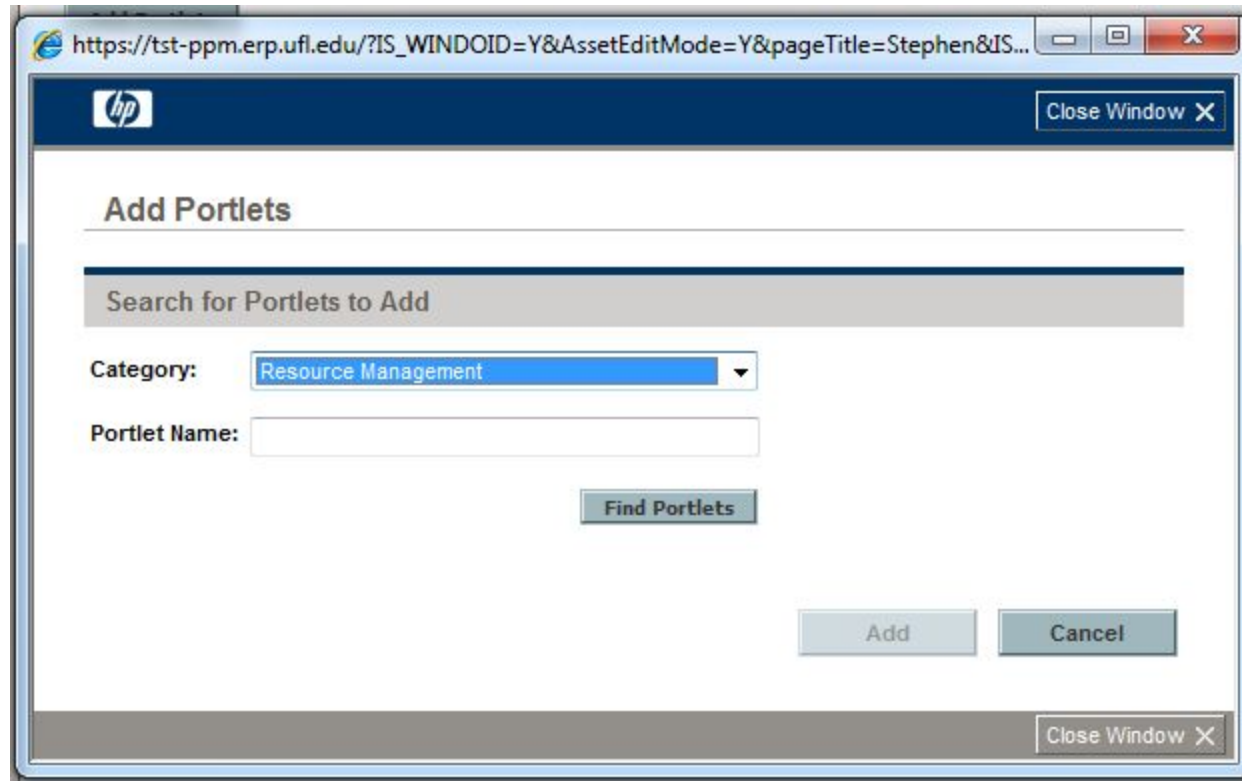
Add Portlets

Approve Time Sheets



Select “Add Portlet”

Choose “Resource Management” from the Category list



The screenshot shows a web browser window with the URL https://tst-ppm.erp.ufl.edu/?IS_WINDOID=Y&AssetEditMode=Y&pageTitle=Stephen&IS.... The page has a dark blue header with the HP logo and a "Close Window X" button. The main content area is titled "Add Portlets" and contains a search bar labeled "Search for Portlets to Add". Below the search bar, there is a "Category:" label and a dropdown menu currently displaying "Resource Management". Underneath, there is a "Portlet Name:" label and an empty text input field. A "Find Portlets" button is positioned below the input fields. At the bottom of the form, there are "Add" and "Cancel" buttons. A second "Close Window X" button is located in the bottom right corner of the page.

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".

At the top, there is a search bar labeled "Search for Portlets to Add". Below it, the "Category" is set to "Resource Management". The "Portlet Name" field is empty. A red arrow points from the text "Find Portlets" in the instructions to the "Find Portlets" button.

Below the search bar, there is a table titled "Select Portlets to Add" with 5 Results. The table has columns: Portlet Name, Category, Description, and Help. A green arrow points from the text "Analyze Assignment Load" in the instructions to the checkbox next to the first row.

<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	?

At the bottom of the table, there are two buttons: "Add" and "Cancel". A grey arrow points from the text "select 'Add'" in the instructions to the "Add" button.

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, there is a header bar with the text "Edit page" on the left and a "Preview" button on the right. Below the header, a note states "Note: All changes to the page are automatically saved". The main content area is divided into sections. The first section is labeled "Header" and contains a "Page Name:" field with the value "Stephen" and a checkbox labeled "Automatically refresh this page every" followed by a text input field for "minutes". The second section is labeled "Portlets" and contains an "Add Portlets" button. Below this, there is a portlet titled "Analyze Assignment Load". At the bottom right of this portlet, there are three small icons: a double-headed arrow (for resizing), a magnifying glass (for filtering), and a close button (X). Two red arrows originate from the text above: one points to the double-headed arrow icon, and the other points to the magnifying glass icon.

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

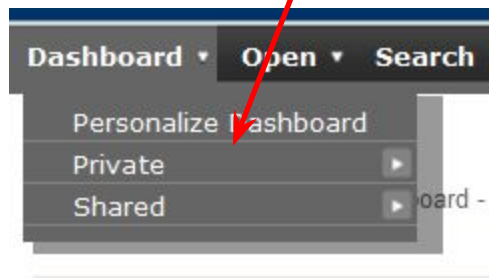
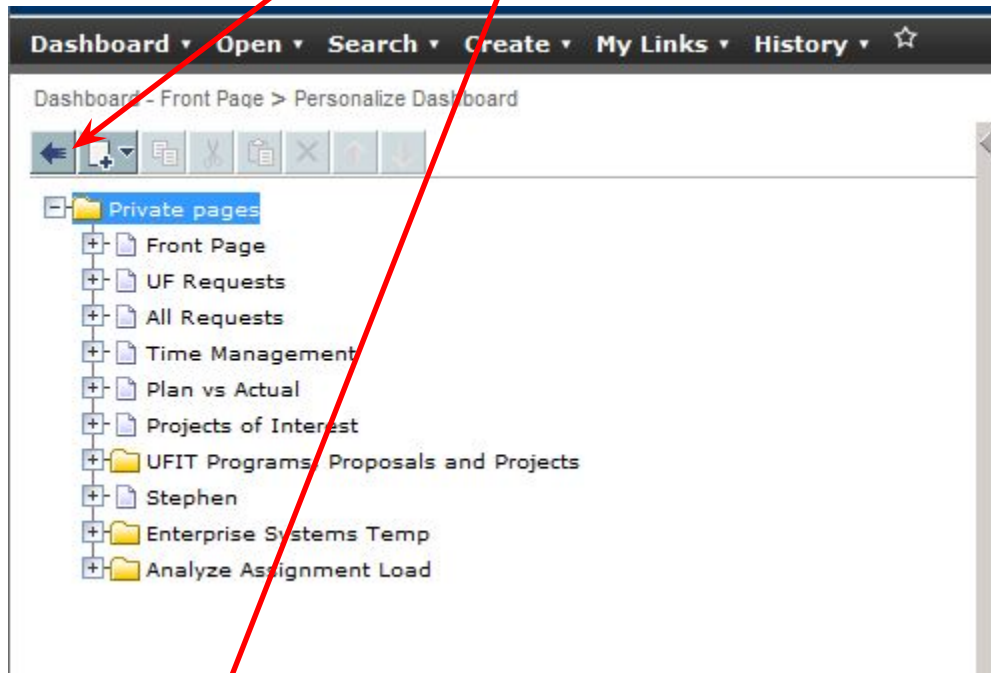
Time Period

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...

	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: Stephen Cates - 6/30/14 - 7/6/14

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

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	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/EP - 9.2 Application ...	(Soft Booked)	0	0	0	0	0	0	0

Data Controls

 [Export Resource Load Details](#)

Done

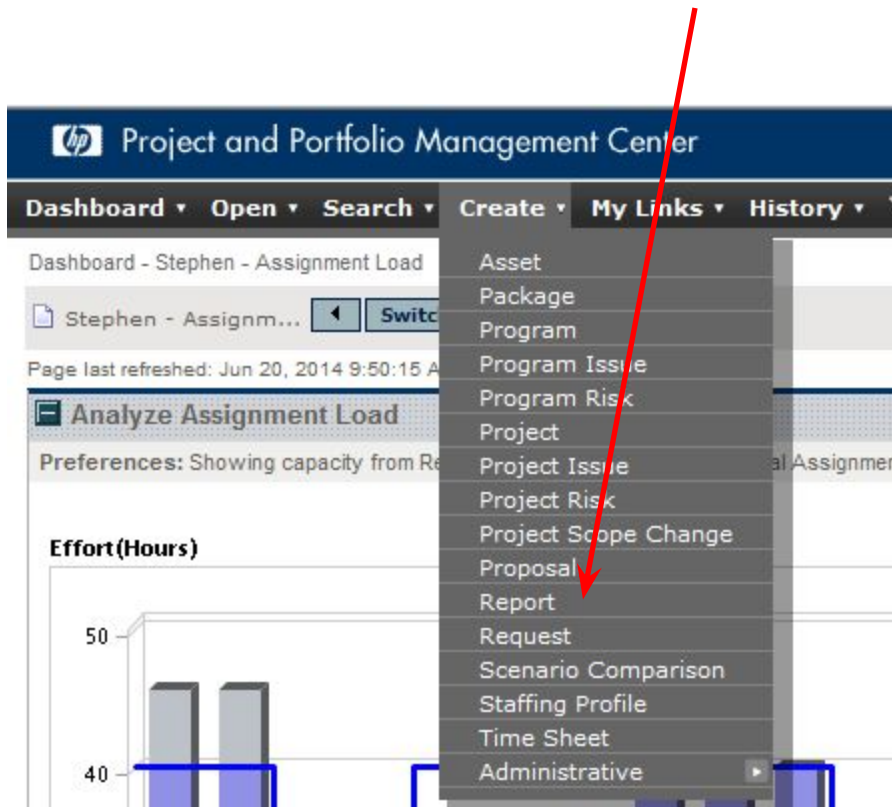
Capacity Level

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

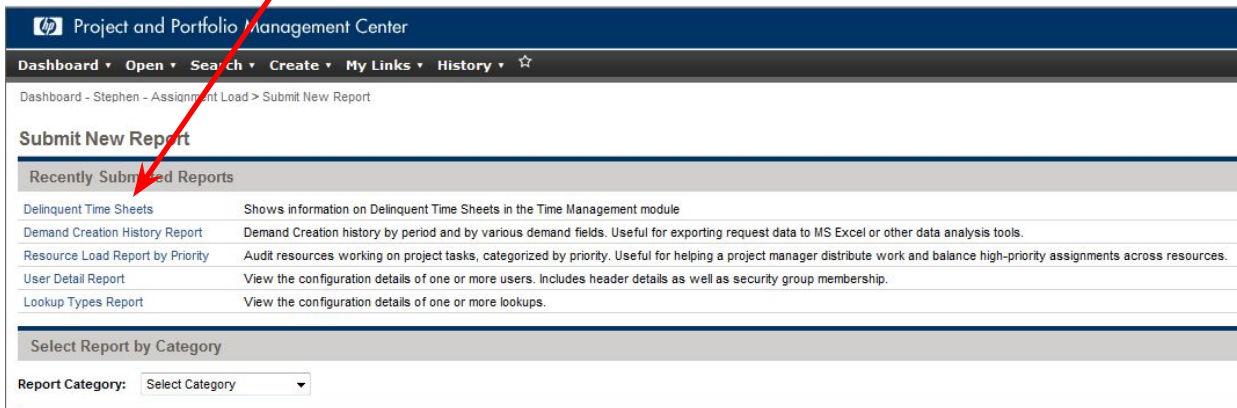
Delinquent Time Sheet Report

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



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

The screenshot shows a web form titled "Submit Report: Delinquent Time Sheets". At the top right are "Submit" and "Cancel" buttons. Below the title bar is a section titled "Report Parameters" with a "Restore Default" link. The form contains several fields: "Previous Time Periods to Show" (text input with value 3), "Include Current Period:" (radio buttons for Yes and No, with No selected), "Grace Period in Days (affects past periods only):" (text input with value 0), "Resource:" (text input with a user icon), "Direct Manager:" (text input with a user icon), "Default Time Approver:" (text input with a user icon), "Organization Unit:" (text input with a list icon), "Time Sheet Status:" (text input with a list icon), and "Sort by:" (dropdown menu with "Period" selected). Three red arrows point to the "Previous Time Periods to Show", "Grace Period in Days", and "Organization Unit" fields. Below the "Report Parameters" section is a section titled "Scheduling and Output Options" with radio buttons for "Run Report Immediately" (selected) and "Run Report On:" (with a date input). There are also checkboxes for "Repeat Every" (with a unit dropdown) and "Send email to:" (with a text input and a checkbox). At the bottom is a section titled "Advanced Notifications" with "Submit" and "Cancel" buttons.

Submit

Cancel

Report Parameters

Restore Default

*Previous Time Periods to Show: 3

*Include Current Period: ☐ Yes ☒ No

*Grace Period in Days (affects past periods only): 0

Resource: [User Icon]

Direct Manager: [User Icon]

Default Time Approver: [User Icon]

Organization Unit: [List Icon]

Time Sheet Status: [List Icon]

Sort by: Period

Scheduling and Output Options

☒ Run Report Immediately

☐ Run Report On: [Date Input]

☐ Repeat Every [Hours] Until [Date Input]

☐ Send email to: Stephen Cates 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:

Period

Scheduling and Output Options

☐ Run Report Immediately

☒ Run Report On: 6/25/14 10:06 AM

☒ Repeat Every

1 Weeks

Until 6/30/18 10:04 AM

☒ Send email to:

Stephen Cates; Troy Haynes

when report is finished

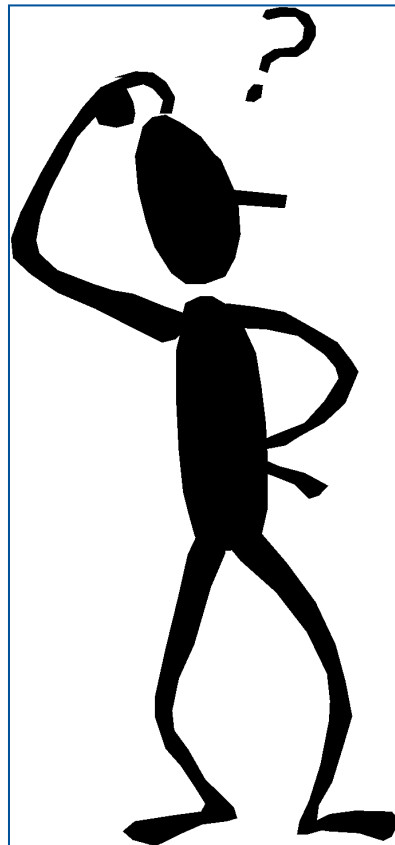
Advanced Notifications

Add a Notification

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