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
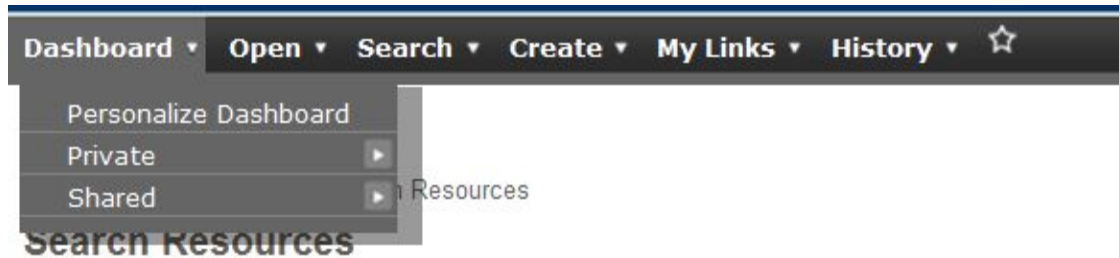
Select the "New Page" option

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

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

Select "Add Portlets"

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

Let's start with Time Approver

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.

Edit page

Note: All changes to the page are automatically saved

Preview

Header

*Page Name: Front Page

☑ Automatically refresh this page every   15   minutes

Portlets
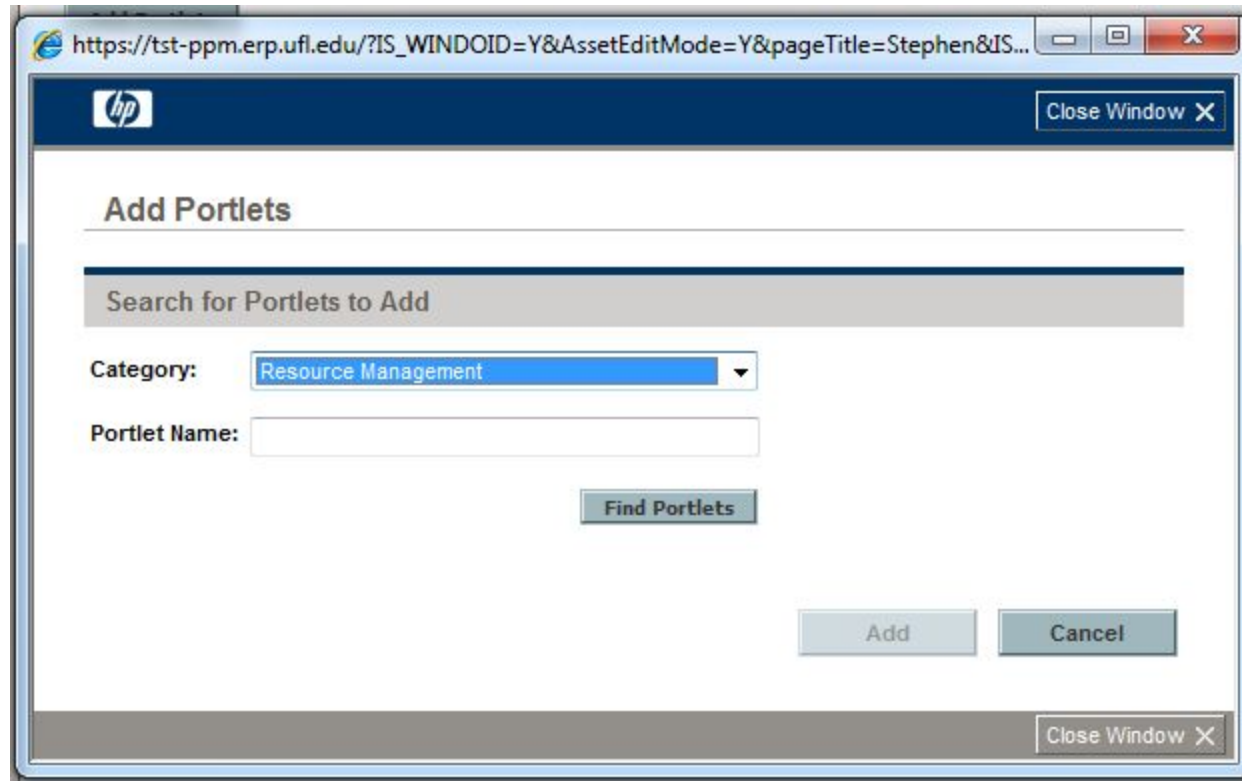
Add Portlets

Approve Time Sheets

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:	Total Hours Equal or Exceed:
Manager:	Total Hours Equal or Less Than:
Org Unit:	Projects:
Time Sheet Line Status: Submitted	

☑ Display preferences summary on portlet:

* Sort By: Manager ▼   ⦿ Ascending   ⦿ Descending

* Rows Displayed: 50

* 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

Select "Add Portlet"

Choose "Resource Management" from the Category list

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

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

Edit page

Note: All changes to the page are automatically saved

Preview

Header

*Page Name: Stephen

☐ Automatically refresh this page every [   ] minutes

Portlets

Add Portlets

Analyze Assignment Load

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:** Change / Release
- ● **Resource Pool** Change and Release
  - ☐ 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: Fiscal Month
Display: 0   past periods
Display: 12   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".
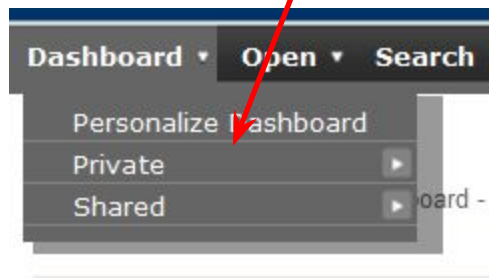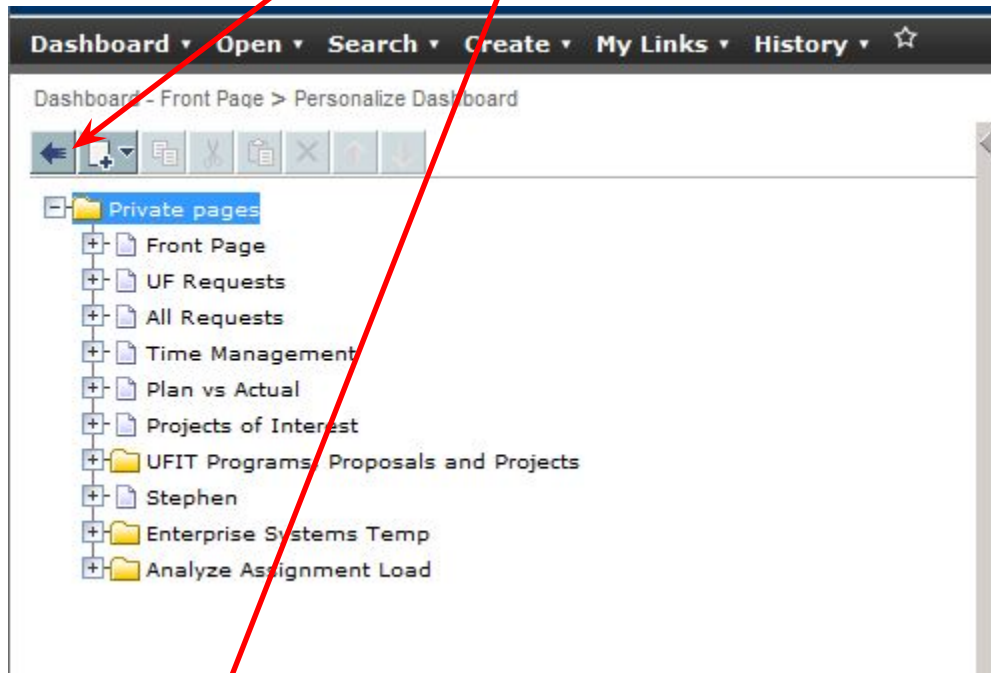
Your Time-Approvers portlet should look similar to below

- 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

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
☐	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
☐	Enterprise Systems FY2014 Project: 70162										
☐	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
☐	Enterprise Systems Overhead FY2015 Project: 76014										
☐	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
☐	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
☑	Enterprise Systems Run FY2015 Project: 75999										
☑	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
☐	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	Sche
Pamela Bengtson							
Total Capacity	40	40	40	40	32	40	4
Total Assignments	40	40	40	40	31.09	35.91	35.9
Available Capacity	0	0	0	0	0.91	4.09	4.0
Robert Bull							
Total Capacity	40	40	40	40	32	40	4
Total Assignments	39.38	39.38	39.38	39.38	43.84	52.27	52.2
Available Capacity	0.62	0.62	0.62	0.62	(11.84)	(12.27)	(12.2
Pate Cantrell							
Total Capacity	0	32	40	40	32	40	4
Total Assignments	0	23.5	23.5	23.5	15.14	9.23	9.2
Available Capacity	0	8.5	16.5	16.5	16.86	30.77	30.7
Stephen Cates							
Total Capacity	40	40	40	40	0	32	4
Total Assignments	37.48	37.48	37.48	37.48	0	26.3	28.9

⊠ ® Export Resource Load Details

Done

apacity 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/FI/EP - 9.2 Application ...	(Soft Booked)	0	0	0	0	0	0	0
Data Central								

☒ ® Export Resource Load Details

Done
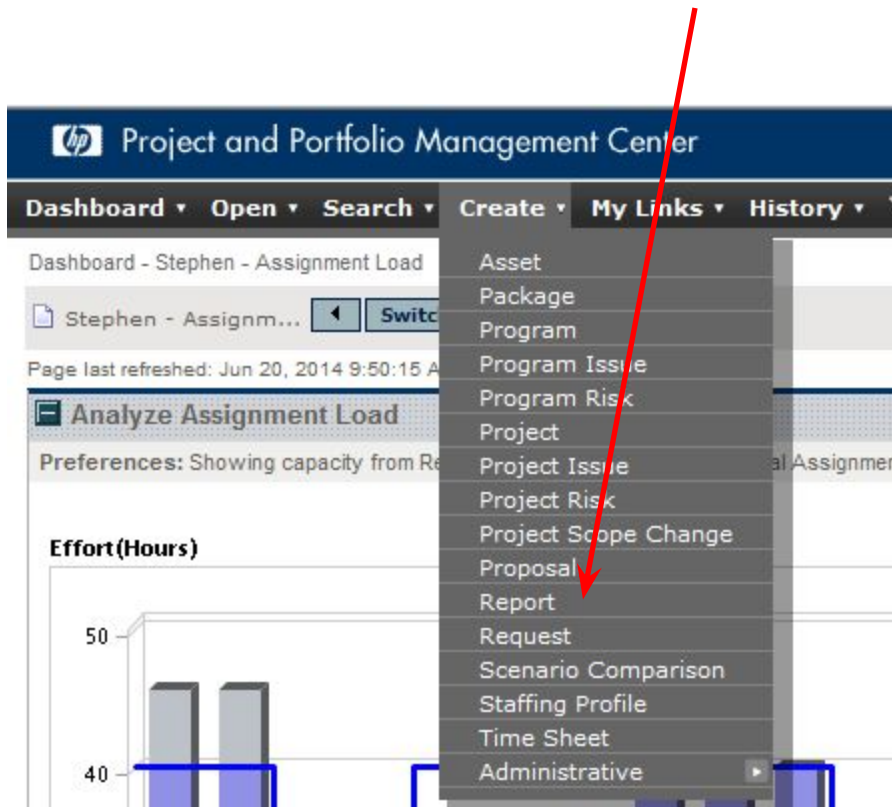
pacity Level

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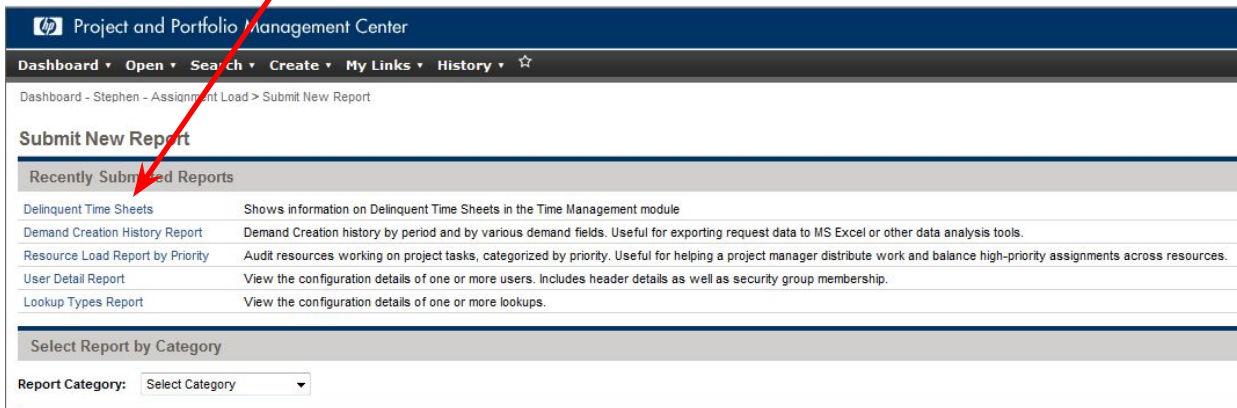
Delinquent Time Sheet Report

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

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: [3]

*Include Current Period: ○ Yes ● No

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

Resource: [   ]

Direct Manager: [   ]

Default Time Approver: [   ]

Organization Unit: [   ]

Time Sheet Status: [   ]

Sort by: [Period   ▼]

Scheduling and Output Options

● Run Report Immediately

○ Run Report On: [   ]

        □ Repeat Every [Hours ▼] Until [   ]

□ 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:	3
*Include Current Period:	○ Yes ● No
*Grace Period in Days (affects past periods only):	0
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

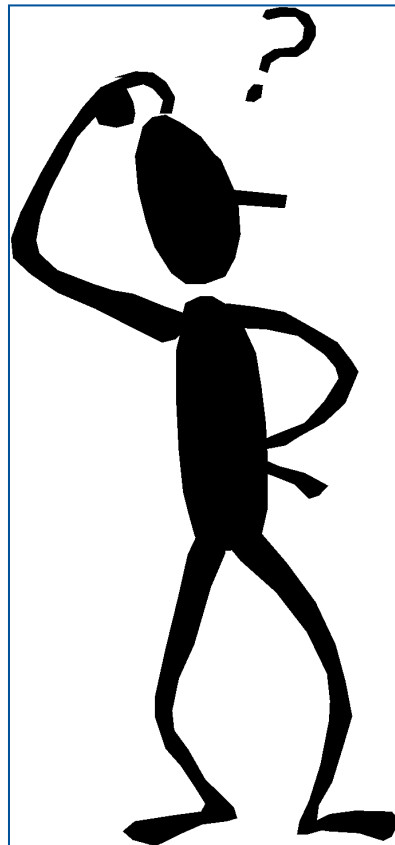☑ Send email to: Stephen Cates; Troy Haynes   when report is finished

Advanced Notifications

Add a Notification

Send When	Description	Recipients

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