

Reaching New Communities: Selectable Time Reporting in PG6

Project management generally involves two forms of measurement. First the measurement of accomplishment, and second the measurement of the effort used. In many environments, both are required. For this purpose we have created a timesheet reporting system that directly relates time spent to the tasks it has been spent on. Using this process we can get both measurements in one self consistent and auditable process.

But effort reporting is not a universal requirement. If an organization does not have to bill others, there may be no need to measure work time. If work is relatively difficult to forecast, such as in a research organization, then effort estimating and measurement may add no value. If you are just beginning project management, or working with a team of people not used to the discipline, then it may be better to focus solely on accomplishments and schedules and forget about effort.

Up until Version 6, Project Gateway was pretty tied to the Timesheet - dual measurement model. Even if you did not care about the numbers, you had to provide some. And timesheet reporting was the only convenient way to provide status if you worked on multiple projects.

But with the advent of PG6, the system now offers you a range of choices. You can choose to measure accomplishments only which we call No Timesheet Reporting. You can measure effort at the project level, but not at the task level which we call Project Level Timesheet Reporting, or to measure both accomplishment and effort at the task level as always which is now called Task Level Timesheet Reporting. It is even possible to mix these practices.

Traditional and Light Assignments

Project Gateway 6 has two fundamental kinds of task assignments. There are the traditional time reporting assignments and the new Non Time Reporting "Light" assignments. They are equivalent except that "Light" assignments do not have "planned work" or "actual work". Hence when you create these tasks, you don't make estimates and when you update them, you don't enter work hours. In every other respect, the assignments are equivalent.

Checksheet Reporting

Since no work hours are recorded for Light assignments, a timesheet is not necessary. Instead, the system now provides a new tool, called a "Checksheet", that collects accomplishments across multiple tasks and projects.

When a Light assignment appears on a Checksheet, droplist fields allow the user to report the task start and finish dates along with the status of any checklist items that may be on the assignment. This minimalist reporting method is very simple to use.

The benefits of using Light assignments are that that they are easier to plan (no need to estimate) and easier to report (no need to enter daily work hours and work remaining) and easier to manage (no need to worry about variances, missing timesheets, error correction) and it can be a bit more responsive because you don't need to wait to the end of the week to see the task activity for the preceding week.

However it also means that you have no way of seeing how work is being spread across projects. That in turn may make it harder to ensure that priorities are being observed.

Project Level Time Reporting

To provide a middle ground between task time reporting and non time reporting we have created Project Level Summary Reporting. To implement this, the project leader creates a set of "Summary Assignments" for the project. You create one of these assignments for each person on the project (Note, in most cases this is can be done in a single step). So if you have ten people, you have 10 summary assignments, plus however many task assignments that you use to set the schedule and objectives. Summary Assignments are very simple. They are titled with the name of the project and their dates are automatically adjusted to the lifespan of the project.

At the end of each week, everyone creates a timesheet, but the timesheet has only one row for each project rather than a row for each task. Hence timesheet reporting becomes simply a matter of allocation of hours between projects without regard to the actual tasks that were done. When the time entry is complete the checksheet update appears with all of the current Light assignments. You mark them started and finished as appropriate and update any checklist items that were planned. That completes the weekly reporting.

Naturally, you can still use the checksheet directly as often as desired to provide more rapid accomplishment reporting. Tasks that have already been marked as finished will not show up when the timesheet initiated checksheet appears.

So Project Level Timesheet Reporting lets you track effort for the project as a whole but not worry about it at the task level. It also means that you can have some people report time on a project, while others do not. People from billable service groups like IT support, for example, might have to report time, while people in your core organization do not.

Mixed Task Level Time Reporting

Since timesheets are sometimes as much of an emotional issue as a practical one, it is not surprising that some members of a project team may feel that they should not be using a timesheet at all. In particular, it is hard to get managers to do timesheets, particularly those outside the core project organization.

For these cases, you can create a mixed reporting environment. You can create Light assignments for specific people, while everyone else does normal timesheet task reporting. In order to make such a mix of assignments, you must have the project set for Task Level Timesheet Reporting. When you create a new assignment, there will be an option on the form as to whether time reporting is to be used. By setting this to No, you create a Light assignment within a Task Level reporting project.

Summary

With Project Gateway 6, project leaders can now choose the best reporting method for each project. Regular timesheet reporting at the task level, project level time reporting, or no time reporting at all. This allows the system to support a wider range of project management environments and applications than ever before.

Using the new capabilities, you can introduce project management discipline to research groups, academic sites, volunteer organizations, engineering, and marketing teams without the extra effort of effort estimating and timesheet reporting.