Timesheet Administration

Introduction

Using Timesheets for project reporting provides project status useful accounting information. This can contribute to the evolution of a more productive and predicable organization.

Timesheet reporting, however, requires discipline and cooperation among many people. A certain number of mistakes and oversights are inevitable.

This section briefly describes the things you need to do to get the Timesheet system setup. It then describes the process of identifying missing Timesheets using the agent provided for that purpose and the process of correcting Timesheets that have been posted with incorrect data.

What's New in 6

Project Gateway Timesheets have been enhanced in PG6 Several changes will be noticed by previous users.

Integration with checklists.

This is a very significant change that will help both planners and participants. A checklist subdivides a task into trackable deliverables while allowing effort reporting to be done on the task as a whole. This allows planners to use fewer tasks without giving up participant accountability. It reduces participant workload by reducing the time spent selecting and updating tasks and trying to correctly allocate work among them. And it reduces errors by reducing the numbers of tasks being reported.

The checklist reporting process is built into the timesheet as one continuous process. So participants do not need to be reminded to do another procedure, they are simply asked to update checklists when they spend time on tasks.

Project Level Time Reporting

This new project level option allows participants to report all of their effort on a single timesheet line item. While you give up some accounting detail, you still get gross project effort by department and individual. Participants see simplification in reporting.

Project Names on Web Timesheets

Each web timesheet task is not annotated with the projectname to reduce

Driving the Timesheet Process

No one likes being measured, and there is no doubt that Timesheets are a method of measurement. So it is best to make the process as painless as possible. This requires the cooperation of project managers. Most of the tasks that are being reported will originate in project plans. Thus, the project managers ultimately determine whether these tasks are well defined or vague, reasonable in scope or micromanaged, easy to understand or confusing.

As a general guideline, one person should not need to report on more than 2-4 tasks per project per week. So, even in environments with many open projects, a typical Timesheet should not need to contain more than a dozen tasks.

As another guideline, task names should be unique, not repetitive. If a person has 20 tasks all called "Design" in five different projects that themselves have similar project names, it is pretty likely that they will occasionally report on the wrong "Design" or the wrong project. So it's helpful if task names are specific such as "Design subassembly 21A." The Notes timesheets now have a button to show the project name/phase, etc. but clear task names are always a good practice.

Finally, it is very important to have some place to report the work that was done when there are no appropriate tasks planned for it. Creating an overhead category called "Other Work" is very useful as a way to begin time reporting. This allows people to be honest rather than feeling that they have to "fudge the data" to fit it into the set of available tasks.

You should ask people to enter a comment into the Timesheet whenever they assign hours to "Other Work." By doing this, you can get a handle on the time that is not being planned, and use that information to improve the planning process.

Timesheet Setup - Participant Profile Settings

For every participant who is supposed to submit Timesheets you must fill in the Timesheet Profile section of the Participant Profile.

In the body of the Participant Profile, you must set the UserID for that participant.

In the Timesheet profile section you must specify the following:

Overhead Categories. This is a list of all the overhead categories that will appear in this person's Timesheet when the "Add My Tasks" action is used. You can add or remove category names from this list by editing the document. The initial categories that appear here are inherited from the Overhead Categories settings in the Field Map document at the time the participant profile record was created in the database.

Requires Approval. This is a Yes/No field. If Yes, it means that this person's Timesheet must be reviewed and marked for approval by someone else before it can be posted to the assignments.

People who can approve Timesheets. These are the UserID's of the people who may approve a submitted Timesheet for this person. The first person on the list will be notified by email when a Timesheet is submitted for approval.

People who can create Timesheet: If blank, anyone can create a Timesheet for this participant, otherwise select the people who should have this ability. Usually this would be the participant, the department administrator, and the department manager.

People to notify about missing Timesheets: If blank, then no one will be notified. If one or more usernames are entered, then email will be sent to those people if the Missing Timesheet Agent is run and if no Timesheet has been submitted for the week that the agent is checking. These names will also be used for the Missing Timesheets- Reminder function.

Note that you will not be reminded if you have no reportable work. So people who do not have overhead categories and do not have any current tasks, will not receive timesheet reminders

Timesheet Initiation: This controls how weekly timesheets are created. Normally this will be done manually by the user, but for sites using Notes Timesheets, an agent, called "Timesheet Agent Auto-Initiate" is also provided. This agent will compose timesheets and send participants email notifications with doclinks to their timesheet documents. This method is handy when introducing timesheets into large groups because it ensures that the timesheet will be created for each week. Used in conjunction with the Missing Timesheets features, it pretty much guarantees that everyone will be reporting time every week.

By User: The normal choice is "By User" which means simply that the timesheet is created by composing a timesheet form. The user will create a Notes format or Web format timesheet depending upon which client is used to select the timesheet action.

Via TimePortal: This means that timesheet for this person cannot be created in the repository, but only in the Enterprise TimePortal database. This prevent the accidental creation of timesheets for the same week.

Not Allowed: The special choice "Not Allowed" is a setting that prevents timesheets from being initiated for this participant. This would be used for participants that have left the company, for example.

By Agent (NOTES) Only: This means that only the agent will create a timesheet for this person and that the timesheet will be in the Notes client format. An email will be set announcing this timesheet with a doclink to open it.

By Agent (WEB) Only: This means that only the agent will create a timesheet for this person and that the timesheet will be in the Web browser client format. An email will be set announcing this timesheet with a URL to open it.

By Agent (NOTES) or by User: This means that, if the user does not create a timesheet, the agent will the first time it runs in that week. The timesheet will be created in Notes format if the agent makes it.

By Agent (WEB) or by User: This means that, if the user does not create a timesheet, the agent will the first time it runs in that week. The timesheet will be created in Web format if the agent makes it.

Posting Timesheets

To post a Timesheet is to take the data entered on the Timesheet and record it into the associated assignment documents. Information stored on these documents is the source for the project dashboard, the time summary views, and is transferred to project management applications during synchronization.

All Timesheets are posted by an agent called "PGPostem." This agent can be scheduled to run nightly or on the weekend as you wish.

If you have the [PGADMIN] role, you may post the approved timesheets at any time using the menu command **Admin\PostTimesheetsNow**.

When it finds an approved Timesheet, the posting process modifies the associated assignment documents with the actual hours, work remaining, percentage complete, actual start and actual finish dates. It also modifies the "progress history" section of the assignment with the values reported for each day of this period.

It then marks the Timesheet as "posted." Posted Timesheets cannot be edited, however, they can be unlocked by a person with the [PGADMIN] role so that corrections can be made and the Timesheet resubmitted and reposted with corrected information.

Note: Information from the Timesheet is transferred directly to the Costing Center application for cost calculation.

View Posting Log

When a Notes Timesheet that has been posted is opened, an action button "View Posting Log" will be displayed. This will display the exact list of assignment changes that were made by the posting process.

Finding Missing Timesheets

Project Gateway contains a two method for identifying the people who should have submitted timesheets but have not done so.

The Missing Timesheets Report

Open the Repository Administration form and click on Missing Timesheets. This will generate an up to the minute listing of those participants who have not filed timesheets for the most recently completed period.

The Missing Timesheets Agents

An Agent, "Missing Timesheets" is provided that should be scheduled to run on the weekend or early in the week. It evaluates the status of timesheets for the most recently completed week.

The Missing Timesheets Agent does two things. First, it will update a folder with the profiles of all participants who do not have a Timesheet approved for that week. Second, it will send email to the people listed in the "People to notify about missing Timesheets" field of the participant profile to remind them.

The "Missing Timesheets" folder which is updated by this agent can be accessed from the "Missing Timesheets" item at the bottom of the Timesheets Navigator.

Into this folder will be placed all of the participant profiles of participants who do not have their Timesheet approved as of the time at which the agent was run. This folder is categorized by Organization

When the agent runs, it first determines the appropriate week. It then steps through all participant profiles. For each, it determines whether there is an approved Timesheet stored for this week. If the Timesheet Initiation option is set to "Not Allowed" then the timesheet is not considered to be missing. If so, it removes it from the missing Timesheets folder (if present). If not, it adds it to the missing Timesheets folder and optionally sends an email to the designated people.

Note: If you want to manually adjust the contents of this folder, use the "Remove from Folder" action. Never delete a participant profile!

Missing Timesheets - Reminder

Another Agent, called "Missing Timesheets - Reminder" is intended to be run Thursday night or Friday morning. It sends emails to people who have not composed a timesheet for the current week by that time. This is simply a way of reminding people to get their timesheets done before the end of the week. If you would normally expect people to create their timesheet on Friday afternoon, then do not run this agent since it will needlessly annoy people. If, however, you expect people to create timesheets early in the week and update them daily, then this agent will remind those people who have forgotten to do so.

Checking Timesheet Status

The Timesheet Navigator provides by date and by person views showing Timesheets with their current status. All Timesheets prior to the current week should be posted.

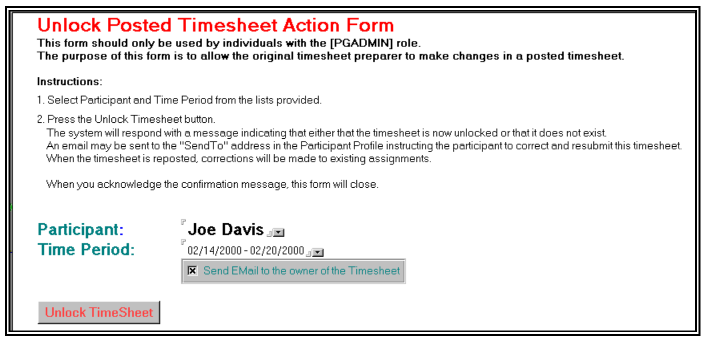
Correcting Posted Timesheets

Correcting Notes Timesheets

To correct a Posted Notes Timesheet, you must have the role of [PGADMIN] or [PGMASTER] and you must have a Notes client.

Start from a view displaying the timesheet to be corrected. Put the view cursor on the timesheet so that the row is selected (but do not double click) and select the Notes menu command *Create* **-** *Other* **-** *Unlock Posted Timesheet*.

When this form opens, select the participant name and the time period from the drop lists provided if necessary. These fields will open with the information from the timesheet that was selected when Create Unlock was executed, so in most cases will be preset. Press the "Unlock" button.


Unlock Posted Timesheet Action Form
This form should only be used by individuals with the [PGADMIN] role.
The purpose of this form is to allow the original timesheet preparer to make changes in a posted timesheet.

Instructions:

1. Select Participant and Time Period from the lists provided.
2. Press the Unlock Timesheet button.
The system will respond with a message indicating that either that the timesheet is now unlocked or that it does not exist.
An email may be sent to the "SendTo" address in the Participant Profile instructing the participant to correct and resubmit this timesheet.
When the timesheet is reposted, corrections will be made to existing assignments.

When you acknowledge the confirmation message, this form will close.

Participant: Joe Davis
Time Period: 02/14/2000 - 02/20/2000
[X] Send EMail to the owner of the Timesheet

Unlock TimeSheet

Unlock will either return an error message or a confirmation dialog. Confirmation will unlock the Timesheet and send an email to the Send to address specified on the Participant Profile. This message will ask the participant to correct the Timesheet

Once the timesheet has been unlocked, two additional buttons will appear whenever the timesheet is displayed: "CorrectUnlocked" and "Relock."

Correct Timesheet

The Correct function will allow you to:

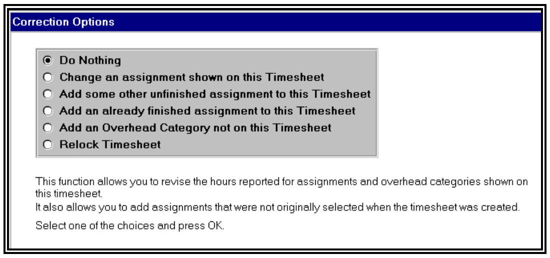
1. Change the posted hours of an assignment or overhead category already in the timesheet.

2. Add an existing, unfinished assignment not yet in the timesheet to the timesheet.

3. Add a currently completed assignment that is not yet in the timesheet to this timesheet.

4. Add an overhead category not on the timesheet from the current list found on the Participant profile.

5. Relock the timesheet (this should be done after you have made your changes to prevent further editing and to allow recosting).

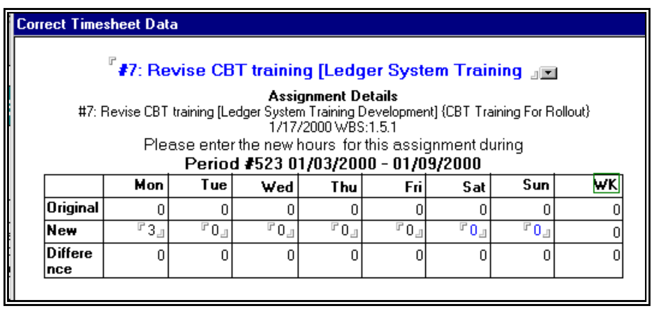


Select the option and press OK.

A new dialog box will appear. At the top you will be given a choice of assignments or categories to modify.

Once you select the item, you must move the cursor. The words "Click Here" appear to remind you to do this. When this is done, the data in the mini-timesheet table will be updated to show the selected assignment or category.

The mini-timesheet has with three rows. The first row includes the original hours that were posted for this assignment (if this a "new" assignment for the participant's timesheet then the original hours will be zero). The second row is editable so that you can type in new hours. The third row tabulates the difference between the original and the revised work hours.



After you have finished editing the timesheet, a sequence of dialog boxes will appear.

The "Current Status" dialog box summarizes the assignment's actual work, remaining work and number of hours that you have added to the assignment.

The second dialog box , "Remaining Work Hours", appears for the purpose of verifying the number of hours remaining on the assignment before it is considered complete (0 hours means that the assignment has been completed).

Lastly, the confirm dialog box confirms and implements changes that you had made. You can stop the process at this point without any change being made.

When an assignment is changed on the timesheet, the system will update the corresponding assignment document. This ensures that the timesheet and assignment information will always be consistent.

When the change is complete, the timesheet will close. You must reopen it to see the change just made, to make another change or to relock it.

Note that the timesheet remains in "read mode" when corrections are made. A posted timesheet never goes into Edit mode.

Note that this process allows both Notes and Web timesheets to be corrected, but requires a Notes client to implement the correction.

Relocking the Timesheet

Once you are finished adding and editing assignments to the timesheet we advise that you lock the timesheet. To lock the timesheet either select the Relock Timesheet button or select the CorrectUnlocked button and then choose the Relock option from the dialog box.

Automatic Relocking

If you do not relock the timesheet, the PGPostem Agent will relock it automatically. The PGPostem Agent contains a minimum delay, which can be adjusted by the administrator, to prevent it from relocking timesheets before the user would have a chance to modify them.

The Relock function will immediately notify the first named approver that this timesheet has been changed.

Correcting Posted Web Timesheets

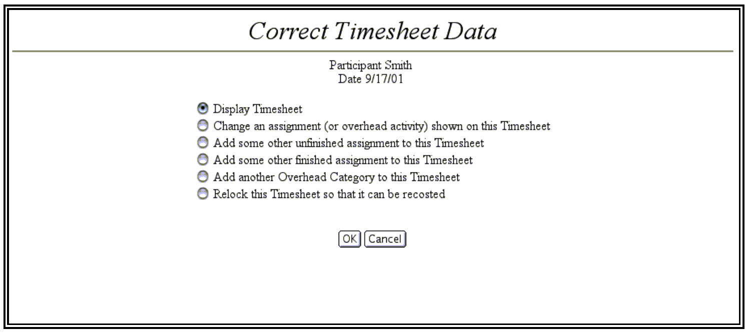
Unlocking the Timesheet

When a posted timesheet is viewed by a person with [PGADMIN] role, an "Unlock" action will appear on the timesheet form.

Clicking this action will create a response page and send an email to the "Send Message To" address associated with the participant of the timesheet. (It will also set the internal flag "pgts_unlocked")

When the OK button is pressed, the timesheet will be redisplayed. In this state, the "Correct" button will appear.

Correcting the Timesheet Information.



The participant (or the Administrator) may use the Correct action to make changes to the timesheet. As these changes are made, any associated assignment documents will be immediately updated to simulate the effect of posting (or to undo that effect).

When all changes have been made, the user should select the "Relock" function on the Correct Options Dialog. This will clear the unlocked status and send an email to the approver of the timesheet (if the timesheet had an original approver) and allow the timesheet to be reprocessed by the costing agent.

There are 4 correction procedures. Each of these procedures will result in a selection dialog to pick the assignment or category. This will followed by a data entry dialog that allows you to enter the new hours for each day of the week. When each correction is complete, the updated timesheet will be displayed.

The assignment corrections will then be followed by one or more situation-specific query dialogs and then by a confirmation dialog.

Revise an existing assignment (or overhead category)

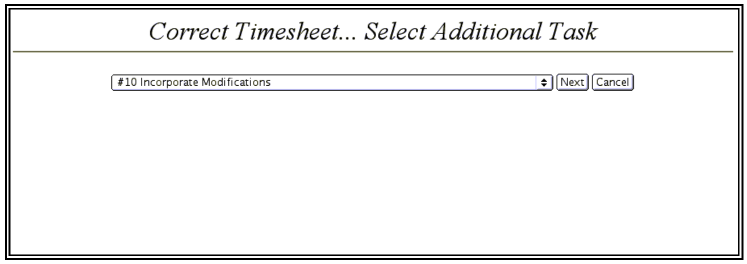
Add a new row for an unfinished assignment (unfinished at the time you begin the process)

Add a new row for a finished assignment (finished at the time you begin the process)

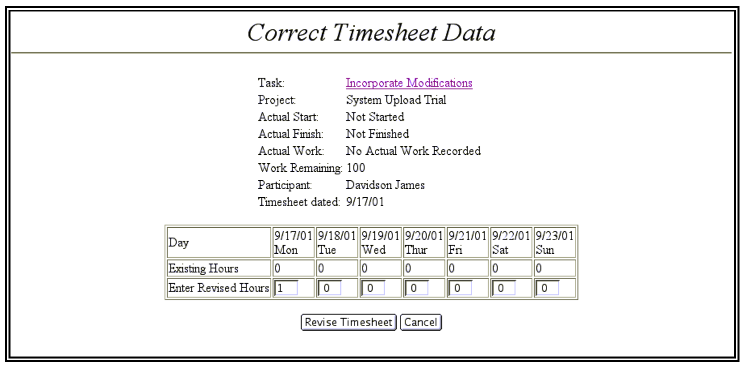
Add a new row for another overhead category (which must be listed in the participant profile)

Note: When all corrections have been made, the Relock action should be used. If this is not done, the Posting agent will relock all timesheets that have been left unlocked for 6 hours or more.

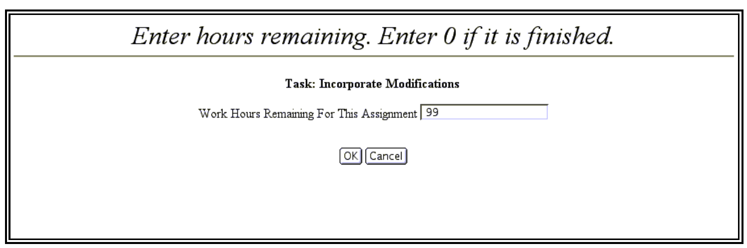
Example of adding a task



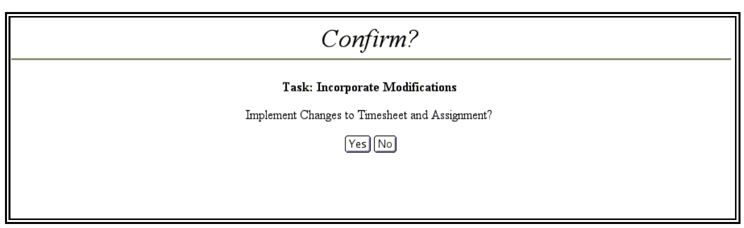
Selecting a new task from the droplist



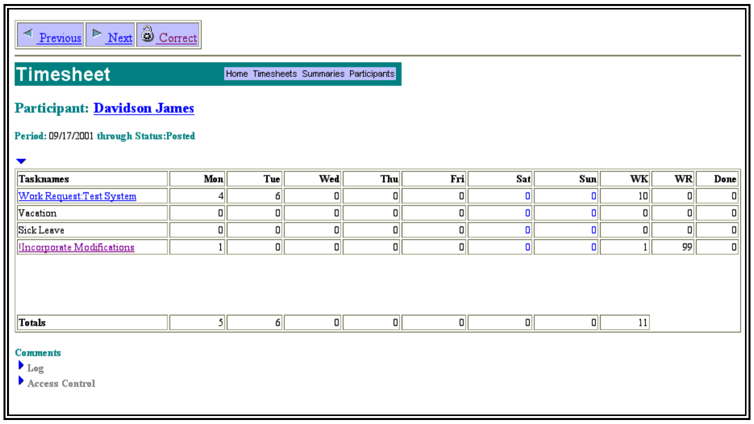
Entering data for this new assignment



Adjusting work remaining



Confirm the new information, until this is done, the timesheet is unchanged.



The updated timesheet shows the new task at the end

Recosting corrected timesheets

When a timesheet has been relocked, it will be processed by the PGCostingLink agent on its next scheduled run. This will cause the costing system to update all costs associated with this timesheet. Note that there is one special case. If all hours are removed from the previously costed timesheet so that the total timesheet hours are zero, the costing agent will not do anything. In this case, you must manually remove any existing cost records from the costing database. This is a relatively rare situation in a production timesheet system since some overhead hours (vacation) would normally be reported even if no work was done.

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