Section 6: *Time Tracking*

Overview

Tracking *Actuals* in *Clarity Timesheets* allow *Project Managers* and the organization to gather and monitor project information that will assist with project decision making. It will provide information regarding the estimating process, which tasks might be impacting the project end date, and where additional support might be needed. By capturing *Actuals* the *Project Manager* is able to determine what is going on with the project. If a task's *Actuals* are more or less than the originally planned estimates, the end date may be impacted. The *Actuals* posted to the project is a way to identify where problems exist and to assist a *Project Manager* in determining the next steps.

The following groups have been established in *Clarity*:

- *Team Member* – A resource assigned to projects and tasks by the *Resource Manager*. Performs weekly time tracking, reviews task assignments, enters *Actuals*, and adds unplanned tasks to timesheet.
- *Resource Manager* – May perform as a *Team Member*. Reviews and approves *Actuals* for reporting *Team Members*. Based on each week's time entries, reviews estimates, reviews resource utilization, schedules, and maintains team group plans (multiple projects).
- *Project Manager* – May perform as a *Team Member*. Creates and maintains detail projects, develops estimates, negotiates for resources, assigns resources, reviews estimates, reviews resource utilization, schedules, and completes weekly tracking and analysis.
- *Administrator* – The *Project Management Office (PMO)* serves as the keeper of *Clarity* and its inherent processes. Performs all administration on the *Clarity* application, maintains all resource information, and system defaults.
- *Portfolio Manager* – The *Portfolio Manager* reviews project information; documents, status, variance, etc. Reviews *Senior Management* reporting, and performs capacity planning for the entire portfolio.

Project Management Cycle

Project Readiness

After a project has been approved through the *IT Steering Committee* approval process, *PMO* activates the project. This process includes *Baselining*, turning on time tracking and granting the proper rights so that the *Resource Manager*, *Project Manager* and *Team Members* perform their daily routines of entering time, managing the project, etc., within a workgroup environment.

Weekly Time Tracking

Project planning and control is a contract between the *Project Manager* who schedules the work and the *Team Members* that do the work. The *Project Manager* determines when tasks should be done based on dependencies, priorities, resource availability, etc., and *Team Members* report back to the *Project Manager* how much they were actually able to accomplish. This cyclic process is the single key to *Project Management (PM)* success! Project analysis, schedule revisions, *Re-baselining* decisions, and *Senior Management* reporting are all based on this weekly cycle.

Actuals are captured at the task level. Therefore, plans should be developed to a level of detail or granularity where a resource's assignments should not exceed 8-12 tasks per week. This amount of detail is controlled by the *Project Manager* in agreement with the *Team Members*.

> S *Team Members enter time in Clarity on a daily basis. Actual hours should be entered for all hours worked including Saturday, Sunday and holidays.*

> S *Timesheets for the current week are submitted by Team Members prior to the end of day Friday for hours worked that week (Saturday-Friday).*

> S *Timesheets must also be created, submitted and approved for professional service employees (contractors) even if no hours were worked that week.*

> S *IT does not permit Resource and Project Managers to plan for over commitment beyond 10 hours per month per Team Member.*

> S *Upon submission, the Resource Manager reviews and approves (or returns) the Timesheet.*

> S *Resource Managers must approve Timesheets prior to Monday 12:00 noon.*

Timesheet Review and Approval

Upon the *Resource Manager* review, the *Timesheet* will have a status of **Approved** or **Returned**. If the status is **Approved**, the *Timesheet* will be posted. If the status is **Returned** the *Team Member* must modify the *Timesheet* and submit again for approval.

The *Resource Manager's* designated back up will perform the *Timesheet* approval process in their absence.

Time Period Posting

> S *Timesheets will post at 12:15 pm every day via the scheduled Post Timesheet job in Clarity.*

The Monday 12:00 pm deadline for *Timesheets* allows a specific time frame for *Re-planning*. Any *Timesheet* submitted/approved after the 12:00 pm deadline, will post the following day and the *Project Managers* must replan accordingly. Once *Timesheet* posting is complete, all actual hours will appear in the projects for the *Project Manager's Re-planning* process.

Project Manager Re-planning

> S *The Project Manager will perform weekly Re-planning and analysis after 1:00 PM on Mondays. This Re-planning stage will be completed by 12:00 Noon on Tuesday. Refer to Section 7: Weekly Tracking, and Section 8: Weekly Analysis, for more information.*

Re-planning includes identifying tasks as *"completed"*, the additional adjustment of estimated work remaining on a task, resource reassignment, *Autoscheduling*, etc. After this *Re-planning* stage, the *Project Manager* will save the project in *Clarity* so that new task information is available to the *Resource Manager* for resource over commitment review and the *Team Members* for populating the next week's *Timesheet*. With that, the *PM* cycle begins again.

The *Resource Manager* should wait to review *Resource Scheduling* and potential resource over commitment until the *Project Managers* have completed the weekly *Re-planning* process on detail projects.

Weekly Cycle Chart

> **S** *The weekly cycle chart below outlines the schedule for the weekly time tracking, approval and posting cycle.*

	MON		TUE		WED		THU		FRI	
	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
Create *Timesheet* for new period.				TM						
Enter daily time in *Clarity* prior to leaving for the day.				TM		TM		TM		TM
Complete and submit *Timesheet* prior to end of day Friday.										TM
Review and approve *Timesheets* by 12:00 noon Monday.	RM									
Timesheet posting at 12:15 pm every day.		PMO		PMO		PMO		PMO		PMO
Re-plan by Tuesday 12:00 noon. • Launch *Open Workbench*. • Analyze and *Autoschedule* project. • Save project back to *Clarity*.		PM								
Resource Scheduling and over commitment review by 12:00 pm Tuesday.			RM	RM						

TM=*Team Member*, PM=*Project Manager*, RM=*Resource Manager*, PMO=*Project Management Office*

Note: If Monday is a holiday, the entire schedule shifts one day.

Creating Timesheets

S *Timesheets are to be created every Tuesday after 12:00 PM.*

Before time is entered in a *Timesheet*, the *Timesheet* must be populated. *Timesheets* should be populated after the *Project Manager* completes the weekly *Re-planning* process to ensure that the timesheet data includes the most up-to-date task assignments.

Time Tracking in *Clarity* should be done on a daily basis. The *Project Manager* assigns resources to tasks. Tasks appear on the *Team Member's Timesheet*. *Team Members* enter hours worked.

1. From the **Home→ Personal** page, click the **Timesheets** link to display "My Timesheet".
2. Select the time period from the carousel in the upper left for the appropriate start date, click **Add Tasks** button, and select **Add Assigned Tasks** to create a *Timesheet* for the selected period.
3. The *Timesheet* will be populated with tasks assigned to the *Team Member* for the selected period.

   Note: Click **Collapse All** to only display the list of projects on the timesheet. Click **Expand All** to display all the tasks under each project.

Adding Tasks to the Timesheet

Assigned tasks should automatically appear on the *Team Member's Timesheet* for the specified time period. However, sometimes a *Team Member* may work on a task that does not appear on their *Timesheet* and the task will have to be added.

Note: *Team Members* should notify the *Project Managers* of any task that does not automatically populate on the *Timesheet*. The *Project Manager* may need to add the *Team Member* to the project roster and as a resource on the task.

1. Click the **Add Tasks** button from the timesheet and then click on **Select Tasks** to display projects/tasks assigned to the *Team Member* (using the standard view and filter). The *Team Member* may add assigned or unassigned tasks to the timesheet.
2. If you would like to browse for additional tasks that you are **not** assigned to, then click on the "filter icon" which will display the filter(s) being used. Click the **x** next to "Assigned Resources" to remove that filter. This will now display all tasks on projects that you are assigned to.

   Note: a variety of filters are available to narrow down the task list. Simply click the drop-down arrow in the "Add Filter" box and select the filter you would like to add. Your custom views and filters can be saved for your own use.
3. Click the check box next to the task(s) that need to be added then click the **Add** button.

Removing Tasks from the Timesheet

Clarity allows Team Members to remove a task from the Timesheet in two different ways.

1. Click the **Remove Tasks** button from the timesheet, click the check box next to the task(s) to be removed and then click the **Delete and Close** button.

   OR

2. From the *Timesheet*, click the three vertical dots ⋮ to the right of the task name then click the **Delete** button for the task to be removed.

Entering Time on your Timesheet

Once the *Timesheet* has been populated, time may be entered for the day.

1. From the *Timesheet*, click the appropriate date cell and enter the hours worked on the task. It is recommended to round to the nearest quarter of an hour.
2. The timesheet is automatically saved, and the totals are automatically populated.

Training

Attending training for a specific project should be tracked to the *Training* task in the appropriate project plan as directed by the *Project Manager*. All contract employees must obtain their *Resource Manager's* approval before tracking training time in *Clarity*. See *Contract Employee Training Policy* located on the *Employee Resource Center* for more information.

Changing Task (Estimate to Complete) ETC

Do not change *ETC* in the *Timesheet*. If a *Team Member* discovers a task will take either more or less time than the estimate, a new estimate may be proposed. *Team Members* should notify the *Project Manager* when an increase or decrease is needed on a specific task estimate.

Adding Notes to Timesheets

Notes are valuable tools for communicating about current issues, such as reporting on the progress of a particular project or task, identifying problems, or explaining *Timesheet* issues.

Note: Nothing of a personal or confidential nature should be entered into the note text.

Team Members may always view their own notes. *Resource Managers* and their backups may view notes attached to a *Timesheet* for their entire team.

1. Click the **Notes** button for the **Notes** dialog box to display.
2. Type text in the **Note** text box and press **Enter**.
3. Click the **X** button to exit the dialog box.

Adding Notes to Tasks

Notes on tasks are especially valuable for communicating issues, progress, problems at a detail level.

1. Click the *Task Name* for the **Notes** dialog box to display.
2. Type text in the **Note** text box and press **Enter**.
3. Click the **X** button to exit the dialog box.

Viewing Timesheet Notes

View Notes on a Timesheet

1. Click the **Notes** button for the **Notes** dialog box to display.
2. Click the **X** button to exit the dialog box.

View Notes on a Task

1. Click the *'Task Name'* for the **Notes** dialog box to display.
2. Click the **X** button to exit the dialog box.

Submitting Timesheets

Timesheets should be completed and submitted by end of the day on Friday. Submitting the *Timesheet* indicates that it is ready for approval by the *Resource Manager*.

> S *If a Team Member plans to be off the end of the week, the time should be entered in advance and the Timesheet submitted in advance.*

The prior, current and two future time periods are always available to *Team Members*. If a *Team Member* will be out of the office for the next week(s), submit the *Timesheet* prior to leaving. The *Resource Manager* must create and submit a *Team Member's* timesheet in the event the *Timesheet* is not created beforehand.

1. From the **My Timesheet** page, click the timesheet period from the carousel for the appropriate period start and end date.
2. Once the timesheet is completed, click the **Submit** button.
3. To display the timesheet that was just submitted, click the timesheet period from the carousel which displays "Submitted" below it.

Note: The submitted *Timesheet* may be adjusted by clicking the **Return** button before it is approved.

Correcting Timesheet Methods

Corrections to a *Timesheet* may be done at any stage of the *Timesheet* cycle. The *Team Member* might discover an error, or the *Resource Manager* may return a *Timesheet* for correction. The method used to correct a *Timesheet* depends on the status of the *Timesheet*.

Status	***Correction Method***
Open	Click any cell and enter new data. Submit the *Timesheet*.
Submitted	Return the *Timesheet*. *Team Member* corrects the *Timesheet* and resubmits. *Team Member* may return their own *Timesheet* and make the necessary corrections prior to the approval process.
Approved	*Resource Manager* returns the *Timesheet* to *Team Member*. Once the *Timesheet* is returned, the status is changed to **Returned**. *Team Member* corrects *Timesheet* and resubmits.
Returned	Discuss the possible reasons for *Timesheet* rejection with the *Timesheet* approver. Upon resolution, *Team Member* corrects *Timesheet* and resubmits.
Posted	Posted *Timesheets* cannot be returned. *Team Member* must create an adjusted *Timesheet*.

Return a Timesheet

Return a Submitted Timesheet

1. Navigate to the **My Timesheet** page.
2. Click the timesheet period from the carousel which displays “Submitted” below it.
3. Click the **Return** button. The timesheet status will be changed to **Returned**.

Return an Approved Timesheet

Only Supervisors can return an approved timesheet.

1. Navigate to the **My Timesheet** page.
2. Click the timesheet period from the carousel which displays “Approved” below it.
3. Click the **Return** button. The timesheet status will be changed to **Returned**.

Correct a Timesheet

1. Navigate to the **My Timesheet** page
2. Click the timesheet period from the carousel which displays “Returned” below it.
3. Make the necessary changes to the *Timesheet* by adding, deleting, and changing entries.
4. Click the **Submit** button.

Once a *Timesheet* has been posted, it can no longer be returned. If you discover an error, the *Team Member* must create an adjustment *Timesheet*.

S *If the time period is closed, the Resource Manager must contact PMO to open the time period temporarily, for the adjustment to be made. The Timesheet approval must be complete on the same day the time period is opened; the Resource Manager will again contact PMO to close the period.*

The only time periods open for time tracking are the previous week, current week and two weeks forward. Periods open in the future enable *Team Members* to submit time ahead of schedule if they will be going on vacation.

Adjustment Timesheets

It is possible to correct a *Timesheet* once it has been posted. Contact a member of the *PMO* team if the time period is not available.

S *Whenever an adjustment Timesheet is created, the Team Member must add a note explaining the reason for the change.*

S *Timesheet notes must be in this format: Changed MM/DD/YYYY from X.X to X.X" (where MM/DD/YYYYY = the date the correction was made and X.X represents the hours). "Reason……" (the reason should be comprised of only a few lines).*

1. Navigate to the **My Timesheet** page.
2. Click the timesheet period from the carousel which displays "Posted" below it.
3. Click the **Adjust** button on the *Timesheet*. A copy of the *Timesheet* with a status of *Adjusted timesheets for Month xx -Month xx; Showing: <current date>* (Current) will be displayed.
4. The *Team Member* may add, change, or delete time entries as necessary to correct the *Timesheet*.
5. To compare the content of the original posted *Timesheet* to the new adjustment *Timesheet*, click the **drop-down arrow** in the status bar to toggle between the two timesheets.
6. Click the **Submit** button.

Note: The adjustment is a complete replacement for the original *Timesheet* and will reflect all *Actuals* for the time period, not just the changes.

Once the newly submitted *Timesheet* has been approved and posted, it becomes the *Timesheet* that will be referenced for the given time period.

Timesheet Approval

Timesheet review and approval is executed in *Clarity* via the **Review & Approve** tab. This provides a list of assigned *Team Member's Timesheets* by timesheet status for a selected time period.

Note: *Timesheets* that have been adjusted, but not approved will appear in the **Submitted** column.

Approve or Return a Timesheet

The *Approval* process is completed by the *Resource Manager* or the *Resource Manager's* back up. The *Resource Manager* should review the *Timesheet* for time tracking accuracy.

1. From the **My Timesheet** page, click **Review & Approve** tab.
2. Select the timesheet period from the carousel to display all the timesheets by timesheet status.
3. Click on the magnifying glass within the **Search** bar to display the Resource Manager search parameter.
4. Supervisors can display their own team members timesheets by clicking the check box next to their name.
5. Click on the timesheet status of **Submitted** to display all the timesheets under that status.
6. Click on the *Resource Name* to review a summary timesheet. Click the **Detail Timesheet** button to review *Timesheet Tasks*, *Actuals, Charge Codes,* and *Estimates* to complete for accuracy.
7. Approve the *Timesheet* by clicking the **Thumbs Up** button.
8. Return a *Timesheet* for adjustment by clicking the **Thumbs Down** button.

Note: A *Resource Manager* must attach a note to the *Timesheet* explaining the decision for returning the *Timesheet*.

Time Period Posting

Once the posting has completed, all approved *Actuals* are applied to the project plans. Some of the noticeable results of the posting process are as follows:

- A task with a status of **Not Started** becomes **Started** when actual hours have been posted.
- The start date of a task is changed to the date on which the first actual hours were posted.
- The *ETC* is decremented by the number of actual hours posted.

Note: Adjustment *Timesheets* do not modify the *ETC*. The *Team Member* must notify the *Project Manager* when adjusting a *Timesheet*. The *Project Manager* should manually adjust the *ETC* once the adjustment *Timesheet* has been posted.

Other Features of Clarity Timesheets

Filtering by Resource

Resource Managers may filter on a specific Resource, Resource Manager, Resource OBS or by Status.

1. Within the **My Timesheet** page, click on the Resource Finder icon.
2. A list of all *Team Members* will appear along with a **Search** bar.
3. Click on the magnifying glass within the **Search** bar to display the search parameters.
4. Select the parameter to search by and enter the appropriate information or type in the name of the resource in the **Search** bar.

Printing a Timesheet

Timesheets can be printed from the **Reports and Jobs** link under the Home menu.

1. From the Home menu click on the **Reports and Jobs** link.
2. Click on the **Timesheet Detail** report.
3. Browse for the **Resource** name.
4. Accept the default **Timesheet Status** or select a specific one if needed.
5. Browse for the appropriate **Time Period**.
6. Click the **Submit** button.
7. The timesheet will be displayed as a PDF file.

Commonly Asked Questions

1. **How do I assign myself to a task that I know is in the project plan?**

   Communicate with the *Project Manager*. For more information, refer to the *Adding Tasks to the Timesheet* section of this document.

2. **How do I inform the Project Manager of my expected work effort remaining?**

   Communicate with your *Project Manager*.

3. **What if I know the task is not in my manager's plan and I wish to add it?**

   Communicate with the *Project Manager*. Your *Resource Manager* is responsible for approving you to be assigned to a project. The *Project Manager* is responsible for adding resources and tasks to the project.

4. **What steps are necessary to adjust a prior weeks' Timesheet?**

   Refer to the *Adjustment Timesheets* section of this document.

5. **What does the Timesheet Status mean to me?**

   - *Open* – *Timesheet* has not been populated or populated, but not submitted.
   - *Submitted* – *Timesheet* is awaiting manager approval.
   - *Approved* – *Timesheet* is waiting to be posted.
   - *Posted* – Approved *Timesheet* was posted.
   - *Returned* – *Resource Manager* has reviewed the *Timesheet*, did not approve it and returned it for modifications.

6. **How do I view details of task, for example, the Start, End, Status, assigned resources?**

   Refer to the *Adding Tasks to the Timesheet* section of this document. This will allow you to see all tasks on projects of which you are a *Team Member*. Communicate with the *Project Manager* to see other aspects of the project.