HP Project and Portfolio Management Center

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HP Time Management User's Guide

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Introduction to HP Time Management

HP Time Management is an HP Project and Portfolio Management Center (PPM Center) application that allows resources (users such as yourself and your colleagues) to use time sheets to report how long they worked on specific "work items." Work items are categorized in HP Time Management as tasks, requests, packages, or other miscellaneous types of work. Planners or operations managers assign work items to specific resources. For more information about work items, see *Using Work Items in Time Sheets and Work Allocations* on page 19.

Resources can also use the My Tasks portlet to report work they have done on projects and tasks.

On an ongoing basis, a resource's time sheets cover a consistent reporting period, such as weekly or semi-monthly. At the end of each reporting period, resources submit their time sheets for approval. Designated approvers then review and approve the reported time. Project managers can compare reported "actuals" to previously estimated time and associated costs.

As described in detail in this guide, depending on your responsibilities, you can use HP Time Management to:

- Create and manage time sheets (many users will use HP Time Management for only this purpose)
- Review and approve time from time sheets
- Freeze and close time sheets
- Create work allocations for users
- Compare actual time reported by users against estimated time and associated costs

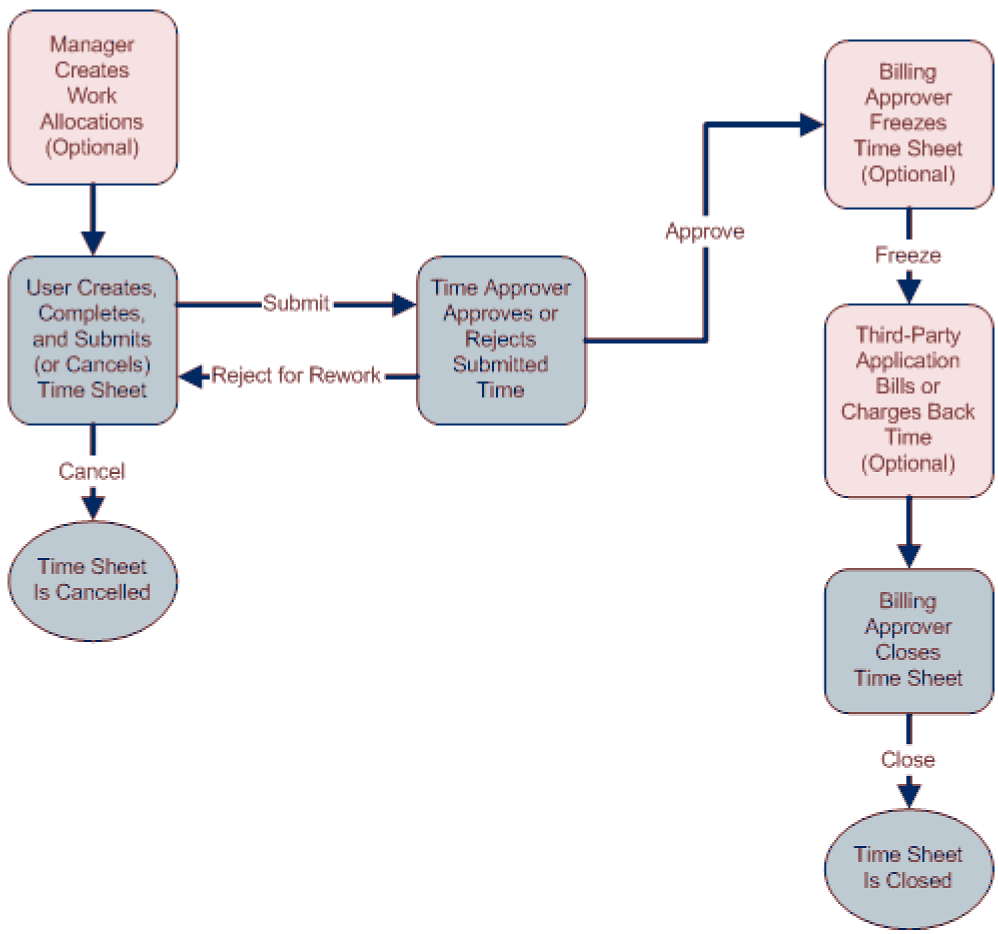
Chapter 1, *Getting Started with HP Time Management,* on page 13 (this chapter), provides an overview of the processing of time sheets; introductions to using activities, work items, the My Tasks portlet, and integration with HP Project Management; and a list of other documents related to HP Time Management.

Overview of the Time Management Process

HP Time Management uses time sheets to streamline the time reporting and approval process. *Figure 1-1* illustrates the HP Time Management process, and subsequent sections outline the steps and the people involved in the process, and related information in this guide.

Most HP Time Management users are resources assigned to specific work items who complete time sheets to report their time, submit their time sheets for approval, and occasionally rework or cancel their time sheets.

Figure 1-1. HP Time Management process overview



Create Work Allocations

Depending on functional requirements, managers or planners can optionally create work allocations, one per work item, to specify:

- The amount of time allocated to be spent on a particular work item.
- Which resources (users) are allowed to spend time on the work item.
- The charge code or codes (with relative percentages) against which the time can be billed. For information about configuring charge codes, see the *HP Time Management Configuration Guide.*

The work item must exist before its work allocation is created and specified. The planner can then compare the actual time entered on time sheets to the time specified in the work allocation.

On projects and tasks, scheduled effort supersedes any work allocation.

Chapter 5, *Creating Work Allocations for Users,* on page 99, provides details about how managers or planners can create, edit, cancel, and delete work allocations.

Create, Complete, and Submit Time Sheets

As a resource who uses HP Time Management to enter the time you spent on work items, you create time sheets to specify which work items you worked on during the current reporting period, how much time you spent on each one, and, if configured, what types of activities you performed on those work items. Each time sheet spans a predefined time reporting period (such as a particular week or month), as determined by the time sheet policy assigned to you. Each work item on the time sheet is represented by a separate line. You submit completed time sheets for approval by designated approvers. Your manager or a specified delegate can also submit time sheets on your behalf.

An administrator assigns each resource a time sheet policy, which controls many aspects of the creation and processing of time sheets, including such parameters as the time reporting period and whether resources are sent email reminders that their time sheets are due. See *Time Sheet Policies* on page 74.

Chapter 2, *Reporting Your Time,* on page 21, provides details about how to create, search, edit, submit, copy, print, and cancel time sheets, and revise their work items. It also describes how to use the My Tasks portlet to report time against projects that use integration between HP Time Management and HP Project Management.

Cancel Time Sheets

You (or your manager or delegate) can cancel your own time sheets. Only unsubmitted time sheets can be cancelled. Once a time sheet has been cancelled, it cannot be reopened or updated.

See *Cancelling a Time Sheet* on page 71 for more information.

Approve Time

When you complete and submit a time sheet, it progresses to a status of Pending Approval. Then your designated time approver can review and approve (or reject) the time you reported on your time sheet. Typically, at the end of each time reporting period, time approvers use the Approve Time Sheets portlet or the Approve Time page to keep track of time sheets that await their approval. Each line on the time sheet can be independently approved or rejected, as necessary.

Once all the lines on a time sheet are approved, the time sheet moves forward in the process. If an approver rejects any time sheet lines, you must rework them by, for example, correcting and resubmitting them, or providing additional information or justification. Chapter 3, *Reviewing and Approving Time,* on page 79, provides details about the approval process.

Some situations require bypassing the approval process; in this case, your time sheet policy can be configured to automatically approve time sheets when they are submitted. Also, depending on the time sheet policy, you might be automatically notified when any of your submitted time is rejected. See *Time Sheet Policies* on page 74.

Freeze Time Sheets

Even after a time sheet is approved, a period of time can be allowed for you to make and submit updates and for approvers to approve the updates. However, at some point, a designated billing approver can optionally “freeze” the time sheet to prohibit further changes and allow reporting of the time sheet’s information or extraction of the information for a billing or financial system. When a time sheet has been frozen for sufficient time (or if it does not need to be frozen), the billing approver can “close” it.

Chapter 4, *Freezing and Closing Time Sheets,* on page 93, provides details about freezing time sheets.

Bill or Charge with Third-Party Applications

After a billing approver freezes a time sheet, costs can be retrieved to bill an internal or external customer. While HP Time Management does not explicitly perform this billing function, it does make the costs associated with each line of a time sheet available for billing, broken down by activity and charge code if applicable. For information about configuring charge codes, see the *HP Time Management Configuration Guide.* Freezing a time sheet effectively prevents any further changes to that time sheet, facilitating a stable period of time during which time information can be extracted and sent to third-party financial applications.

Close Time Sheets

Once a time sheet has been approved and, if necessary, frozen for data extraction or other external use by a billing or financial system, the billing approver closes the time sheet and final reports can be generated.

Chapter 4, *Freezing and Closing Time Sheets,* on page 93, provides details about closing time sheets.

Using Activities to Categorize Time To Be Tracked

The HP Time Management administrator can configure a list of activities the organization uses to categorize work performed against a work item (such as design work or coding) or against an asset. (See *Using Work Items in Time Sheets and Work Allocations* on page 19.) Then, in addition to tracking the total time spent on a given work item or asset, HP Time Management also tracks how much of the time was spent performing different activities. Activities can also be used to classify work as depreciable for financial accounting. (Administrators can require that activities be specified on time sheets for particular work item types, such as requests or packages. In addition, project managers can specify which activity must be used for each task in a work plan, so that all time logged against a particular task is applied to the specified activity.)

For detailed information about activities, see the *HP Time Management Configuration Guide.*

Using Work Items in Time Sheets and Work Allocations

There are four high-level types of work items:

- **Request.** A request in HP Demand Management. For detailed information about requests, see the *HP Demand Management User's Guide.*
- **Package.** A package in HP Deployment Management. For detailed information about packages, see the *HP Deployment Management User's Guide.*
- **Project or task.** A project or task in HP Project Management. Projects can specify whether time is tracked at the project level, at the summary task level, or at the individual task level. For detailed information about projects, see the *HP Project Management User's Guide.*
- **Miscellaneous.** A miscellaneous item in HP Time Management, such as meetings and vacations. An administrator can configure other miscellaneous work items, as required by the business.

Work items are specified in the following interactions:

- When a resource adds lines to a time sheet, he selects which type of work item to add, selects the specific item of that type, and adds that item to his time sheet. Each line on a time sheet represents one work item. For information about completing time sheets, see Chapter 2, *Reporting Your Time,* on page 21.
- When a planner creates an allocation for a work item, he selects the type of work item and then selects the specific item of that type for which to create the allocation. For information about work allocations, see Chapter 5, *Creating Work Allocations for Users,* on page 99.

A work item can require time and effort from more than one resource, and can span multiple steps of the process shown in *Figure 1-1* on page 15. For example, a request to fix a defect in a software application might involve adding functionality to the application. Several different resources might contribute to this request, each performing a different type of work, such as:

- Initial design
- Design review and signoff
- Coding
- Testing
- Release

All involved resources can specify the same request on their time sheets, and log their individual time against that request.

Using the My Tasks Portlet and Project Integration

If you are licensed to use HP Project Management, the My Tasks portlet is available on your PPM Center default page. The My Tasks portlet allows you to log time directly on time sheets for projects that are integrated with HP Time Management, so that you do not need to separately access and complete the time sheets.

From this portlet, you can enter the breakdown (in hours per day, for example) of the time worked on each task over the same time period as the time sheet. This portlet is used to report time only for tasks, not for any other types of work items such as requests or packages.

If you use HP Project Management, you are probably already familiar with the My Tasks portlet. A project manager can integrate HP Time Management and HP Project Management on a project-by-project basis. If a project uses this integration capability, you report details of the time you worked on that project's tasks in either HP Time Management time sheets or in the My Tasks portlet. Then that reported time is automatically reflected in the My Tasks portlet or the time sheets respectively.

For more information about the My Tasks portlet and integration, see *Using the My Tasks Portlet* on page 76 and *Integration of HP Time Management and HP Project Management* on page 77.

If you are a project manager and you want to integrate HP Time Management and HP Project Management for a project, see Chapter 6, *Integrating Time Management and Project Management,* on page 111.

Related Information

The following documents also include information related to HP Time Management:

- *HP Time Management Configuration Guide*
- *HP Demand Management User's Guide*
- *HP Deployment Management User's Guide*
- *HP Project Management User's Guide*
- *HP-Supplied Entities Guide* (includes descriptions of all HP Time Management portlets, reports, and request types)

Other more general information of interest is available in the *Getting Started* guide.

2 Reporting Your Time

In This Chapter:

Overview of Reporting Your Time

As an HP Time Management user (resource), you use time sheets to specify which work items you worked on during the current reporting period, and how much effort you spent on those items in that period. You can also use the My Tasks portlet to report time you spent on projects.

This chapter focuses on how to create, complete, submit, and maintain time sheets. You can specify which work items you worked on during a given time period, how much time you spent on each one, which types of activities (if configured) you performed, and which charge codes (if configured) to use for each item.

Each work item is represented on the time sheet by a time sheet line, where you specify the how long you worked on that item. Depending on the configuration of HP Time Management, you can (or might be required to) specify the type of activity performed for the work item, such as coding or writing test scripts.

When you complete the time sheet, you submit it for approval. When the time sheet is submitted, all lines that were not yet in Submitted status become Submitted, and the time sheet progresses to the Pending Approval status. For details about the approval process from the approver's perspective, see Chapter 3, *Reviewing and Approving Time,* on page 79.

To understand time sheets and time sheet lines, also consider the following:

- The lines in a time sheet can have different approvers.
- An approver can approve only the particular time sheet lines he is authorized to approve.
- Each time sheet line has a status, and the time sheet as a whole has a status that reflects the statuses of its lines. The relationship between the statuses of the lines of a time sheet and the status of that time sheet are described where appropriate throughout this guide, and they are particularly useful during the time sheet submission and approval processes. For a summary, see *Summary of Time Sheet Line Statuses and Time Sheet Statuses* on page 64.

As described in subsequent sections of this chapter, you can take the following actions in working with time sheets:

- Create a time sheet.

  Newly created time sheets have a status of Unsubmitted.

- Add time sheet lines that reflect the work items you worked on.

  New time sheet lines have a status of Unsubmitted.

- Use the **Time Breakdown** tab to specify how long you worked on each item.

- Complete the **Project Fields** and **Additional Information** tabs as needed. Project fields apply to only project and task work items.

- Complete time sheet line details as needed to specify the activity breakdown and charge codes for the lines.

- Remove time sheet lines from the time sheet.

- Submit the time sheet so that approvers can approve or reject its lines.

  All of the lines of the submitted time sheet have a status of Submitted and the time sheet has a status of Pending Approval.

- For a submitted time sheet, initiate rework of particular time sheet lines before the approver approves or rejects them, or add lines to the time sheet.

  The status of such time sheet lines becomes Unsubmitted.

- Review a time sheet if an approver rejected at least one of its lines.

  Rejected lines have a status of Rejected and the time sheet has a status of In Rework.

- Rework items that approvers rejected and update the corresponding time sheet lines accordingly.

  The time sheet lines that you indicate on the time sheet you are reworking become Unsubmitted. If all lines on the time sheet become Unsubmitted in this manner, the time sheet status changes from In Rework to Unsubmitted.

- Resubmit the time sheet whose items you have reworked.

  The status of all of the time sheet's lines becomes Submitted again and the time sheet status becomes Pending Approval again.

- Cancel a time sheet. Cancelling a time sheet cannot be reversed.

  The cancelled time sheet has a status of Cancelled, and all of its lines are deleted.

- Print a time sheet.

- View a time sheet's audit trail of events.

Creating a Time Sheet

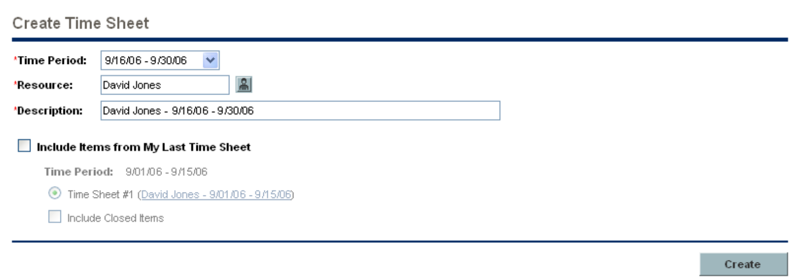
An administrator assigns each user a time sheet policy, which controls a number of aspects of time sheet creation and operation. For more information, see *Time Sheet Policies* on page 74.

To create a time sheet:

1. Log on to PPM Center.
2. From the menu bar, select
   Time Management > Time Sheets > Create a Time Sheet.

   The Create Time Sheet page appears. The **Include Items from My Last Time Sheet** checkbox and its subordinate options appear only if you had a time sheet for the most recent previous time period.

   Suppose you did not create a time sheet for the most recent previous time period, but you did create a time sheet for some earlier time period. If you want to include work items from that time sheet in your new time sheets, create time sheets for each missing time period, from the oldest missing time period through the current time period in sequence, and include items from the previous time period in each new time sheet.

   If the applicable time sheet policy allows only one time sheet for the combination of **Time Period** and **Resource** you specify, and one already exists, a warning is displayed as in *Figure 2-13* on page 75.

3. Complete the fields as specified in the following table.

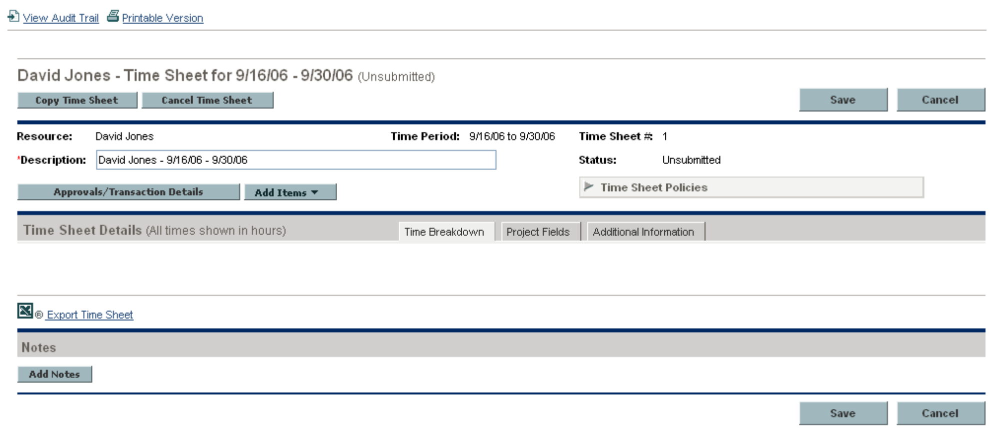
Field Name (*Required)	Description
*Time Period	The time period for the new time sheet. The default is the current time period.
*Resource	By default, your username. If you are a resource's manager or delegate (see *Delegation* on page 81), you can select that resource's name from the list that appears when you click the icon for this field.
*Description	A description of the time sheet. By default, this is the **Resource,** followed by a hyphen (**-**), followed by the **Time Period.**
Include Items from My Last Time Sheet	Whether or not to include, from the time sheet for the most recent previous time period, items that can still have time logged against them on the new time sheet. If there is no time sheet for the most recent previous time period, this option and its subordinate options, described below, do not appear.
Time Sheet #<*number*> (<*last time sheet Description, linked to that time sheet*>)	From the last time period, the time sheet that has items to be included in the new time sheet. If you have multiple time sheets from the last time period, they are listed for you to select one.
Include Closed Items	Whether or not closed work items from the last time sheet are to be included in the new time sheet. Closed work items are: ■ Requests that are closed ■ Tasks that are complete and whose projects still allow time to be logged ■ Packages that are closed

4. Click **Create.**

The time sheet is created and the Edit Time Sheet page appears. The title of this page has the format:

Resource - Time Sheet for *Time Period* (*time sheet status*)

In the **Time Sheet Details** section, the **Time Breakdown** tab is selected.

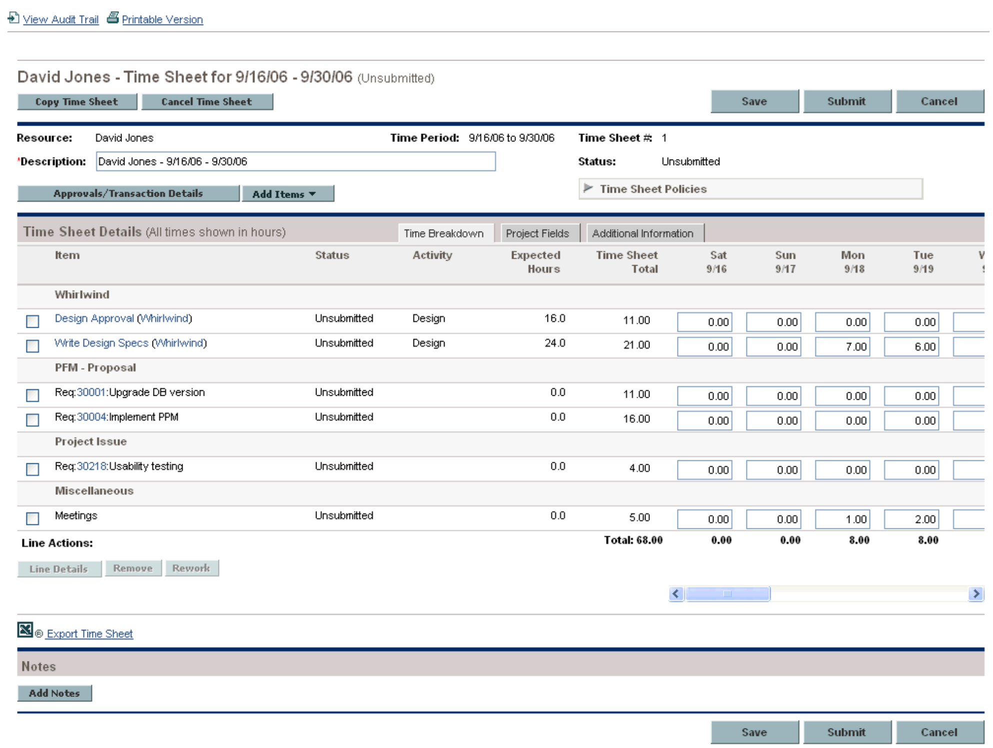


Before you add work items to the time sheet, HP recommends that you read the section *Understanding Time Sheets and Time Sheet Lines* on page 27 to familiarize yourself with the layout, buttons, tabs, and links of a completed time sheet that is ready to submit for approval.

Understanding Time Sheets and Time Sheet Lines

The purpose of this section is to familiarize you with the layout and content of a time sheet that is ready to submit for approval. *Figure 2-1* shows an example time sheet (Edit Time Sheet page) to which a number of lines (work items) have been added. The procedures for adding lines, reporting time, specifying other required data, and submitting a time sheet for approval are described in subsequent sections.

Figure 2-1. Example time sheet



The title of the time sheet has the format:

> *Resource* - Time Sheet for *Time Period* (*time sheet status*)

Below the title and above the tabs of the **Time Sheet Details** section, the time sheet displays the basic fields, buttons, and links described in *Table 2-1*.

Table 2-1. Basic time sheet fields, buttons, and links (page 1 of 2)

Field (*Required), Button, or Link	Description
View Audit Trail link	See *Viewing the Audit Trail* on page 73.
Printable Version link	See *Printing a Time Sheet* on page 72.
Copy Time Sheet button	See *Copying a Time Sheet* on page 70.
Cancel Time Sheet button	See *Cancelling a Time Sheet* on page 71.
Save button (also at bottom of time sheet)	Saves the edits made to the time sheet.
Submit button (also at bottom of time sheet)	Submits this time sheet. (Button appears only when the time sheet has at least one time sheet line.)
Done button	Saves the time sheet and returns to the previous screen. (Button replaces the Submit button when a time sheet is submitted.)
Cancel button (also at bottom of time sheet)	Cancel the edits made to the time sheet.
Resource	(Read-only) The person for whom the time sheet was created. See *Creating a Time Sheet* on page 24.
Time Period	(Read-only) See *Creating a Time Sheet* on page 24.
Time Sheet #	(Read-only) A sequence number that is automatically assigned to the time sheet. It is usually **1.** However, it can be greater than **1** if the resource is allowed to create more than one time sheet per time period. Also, if a time sheet for this resource and time period was previously created and cancelled, this number is incremented.
*Description	The time sheet's description, which can be modified for a created time sheet. See *Creating a Time Sheet* on page 24.
Status	(Read-only) The current status of this time sheet. For summary information about time sheet statuses, see *Summary of Time Sheet Line Statuses and Time Sheet Statuses* on page 64.

Table 2-1. Basic time sheet fields, buttons, and links (page 2 of 2)

Field (*Required), Button, or Link	Description
Approvals/Transaction Details button	See *Time Sheet Approvals and Transaction Details* on page 62.
Add Items button	Click to add a new line to a time sheet. From the drop-down list that is displayed, select the type of work item to add. Provides options to add a work item to the time sheet. See *Adding Work Items to a Time Sheet* on page 31.
Time Sheet Policies	Click the arrow at the left end of this button to display a summary of the policy requirements enforced for this time sheet. If a Warning icon appears next to a work item or on the right side of the button, the requirements that are not met are shown in bold. See *Time Sheet Policies* on page 74.

The **Time Sheet Details** section has the following tabs:

- The **Time Breakdown** tab (selected by default), as shown in *Figure 2-1* on page 27 and described in *Reporting Time on the Time Breakdown Tab* on page 52, which also describes how the work items are organized on the time sheet.
- The **Project Fields** tab (see *Completing the Project Fields Tab* on page 55).
- If time sheet line user data has been configured for you to specify, the **Additional Information** tab displaying this user data for the entire time sheet (see *Displaying the Additional Information Tab* on page 56).

In addition, the columns, buttons and link described in *Table 2-2* appear within the **Time Sheet Details** section, no matter which of its tabs is selected.

Table 2-2. Columns, buttons, and link on all Time Sheet Details tabs

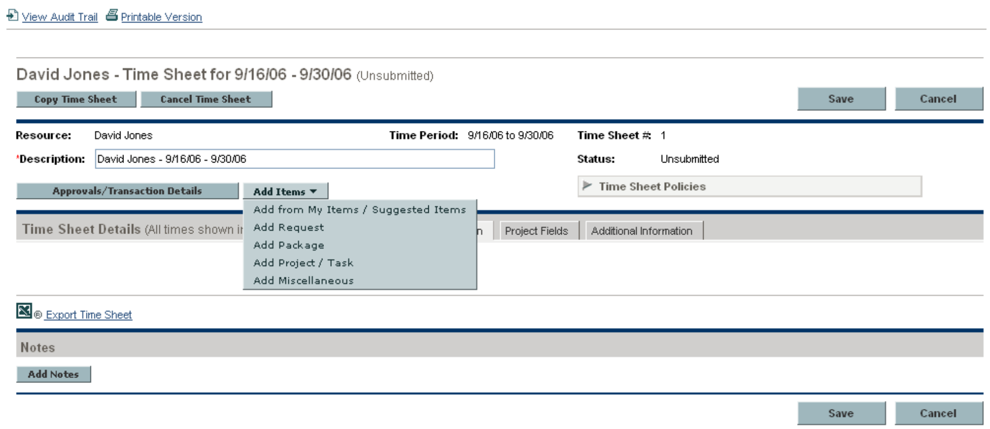
Column, Button, or Link	Description
Item column	The names and truncated Descriptions of each item (work item).
Status column	The status of each item (time sheet line). For summary information about time sheet line statuses, see *Summary of Time Sheet Line Statuses and Time Sheet Statuses* on page 64.
Activity column	An activity for the item. One item can be divided into multiple activities, displayed one per line. This allows you to enter time worked for each activity of the item. See *Using Activities to Categorize Time To Be Tracked* on page 18 and *Charge Codes/Activities Tab* on page 57.
Line Details button (under the Line Actions: heading)	Opens the Work Item Details window for the selected time sheet line (work item). This window includes the tabs described in *Viewing and Specifying Time Sheet Line Details (Work Item Details)* on page 57. (Button appears only when the time sheet has at least one time sheet line, and it is enabled only when one time sheet line is selected in the checkboxes of the left-most column.)
Remove button (under the Line Actions: heading)	Removes the selected time sheet lines from the time sheet. (Button appears only when the time sheet has at least one time sheet line, and it is enabled only when at least one unsubmitted time sheet line is selected in the checkboxes of the left-most column.)
Rework button (under the Line Actions: heading)	Allows rework of the selected time sheet lines (work items), changing their status to Unsubmitted. For more information, see *Reworking Lines on or Adding Lines to a Submitted Time Sheet* on page 69. (Button appears only when the time sheet has at least one time sheet line, and it is enabled only when at least one submitted time sheet line of a previously submitted time sheet is selected in the checkboxes of the left-most column.)
Export Time Sheet link	Exports the time sheet to a Microsoft® Excel worksheet.

Finally, a **Notes** section appears at the bottom of the time sheet. Clicking its **Add Notes** button allows you to add text notes to the time sheet.

Adding Work Items to a Time Sheet

To add any work items (time sheet lines) to the time sheet in order to log time against them:

1. Click **Add Items.**



The following list of options appears for adding items to the time sheet:

- **Add from My Items / Suggested Items.** This option adds work items from the My Items list or the Suggested Items list. The My Items list is a personal list of items you build and maintain, and it is retained time period after time period. The Suggested Items list is automatically generated by HP Time Management for your convenience. (See *Using the My Items List* on page 32 and *Using the Suggested Items List* on page 41.)

- **Add Request.** See *Adding Requests Directly to a Time Sheet* on page 43.

- **Add Package.** See *Adding Packages Directly to a Time Sheet* on page 45.

- **Add Project / Task.** See *Adding Projects or Tasks Directly to a Time Sheet* on page 46.

- **Add Miscellaneous.** This option is used for vacation, meetings, and other items. See *Adding Miscellaneous Items Directly to a Time Sheet* on page 51.

If you select any of the last four options to add an item directly to the time sheet, after you select the type of item to add—request, package, project / task, or miscellaneous—the corresponding Add <*item type*> to Time Sheet window appears. Its fields serve as filter criteria when you add requests, packages, or tasks. You specify these criteria as desired to select which subset of the available items of that type are to be listed for you to potentially add to the time sheet. The fields for adding each type of item are described in the sections referenced above.

Repeat this step as needed to add all the items of interest to the time sheet.

When you add at least one line to the time sheet, the **Submit** button appears, to allow you to submit the time sheet.

If a Warning icon appears next to a work item or on the right side of the **Time Sheet Policies** button, click the arrow at the left end of the **Time Sheet Policies** button to display a summary of the policy requirements. Requirements that are not met are shown in bold. For example, certain work items might require that you specify their activities or their charge codes; to do so, select one item, click **Line Details**, and complete the **Charge Codes/Activities** tab.

For a description of the time sheet and its lines, see *Understanding Time Sheets and Time Sheet Lines* on page 27.

2. Click **Save** to save the time sheet.

Using the My Items List

The My Items list is a list of items that you create and maintain for your convenience on the **My Items** tab. Unless you delete them, items in the My Items list remain available to quickly add to any subsequent time sheets you create.

The following sections describe how to build the My Items list from the entire set of work items you can access, how to delete items from the list, and how to add items from the My Items list to a time sheet.

Also, to learn about the Suggested Items list, which HP Time Management generates for you, see *Using the Suggested Items List* on page 41, and to add items from the Suggested Items list to the My Items list, see *Adding Items from the Suggested Items List to the My Items List* on page 43.

Adding Items to the My Items List

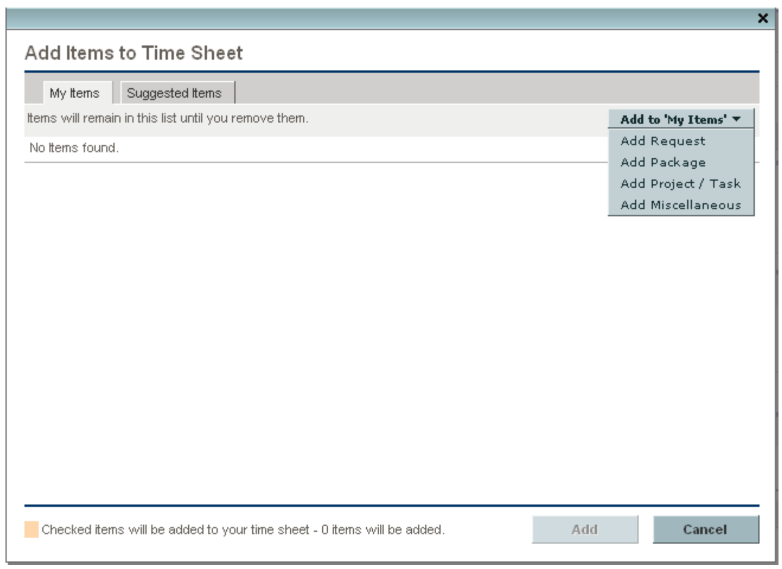
You can add items to the My Items list whether or not they are in the Suggested Items list. (To add items from the Suggested Items list to the My Items list, see *Adding Items from the Suggested Items List to the My Items List* on page 43.)

To add items to the My Items list:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add from My Items / Suggested Items.**

   The Add Items to Time Sheet window opens to the **My Items** tab.

2. Click **Add to 'My Items'.**

   The following list of options appears for adding items to the My Items list:

   - **Add Request.** See *Adding Requests to the My Items List* on page 34.
   - **Add Package.** See *Adding Packages to the My Items List* on page 36.
   - **Add Project / Task.** See *Adding Projects or Tasks to the My Items List* on page 37.
   - **Add Miscellaneous.** This option is used for vacation, meetings, and other. See *Adding Miscellaneous Items to the My Items List* on page 40.

After you select the type of item to add—request, package, project / task, or miscellaneous—the corresponding Add <*item type*> to 'My Items' window appears. Its fields serve as filter criteria when you add requests, packages, or tasks. You specify these criteria as desired to select which subset of the available items of that type are to be listed for you to potentially add to the My Items list. The fields for adding each type of item are described in the sections referenced above.

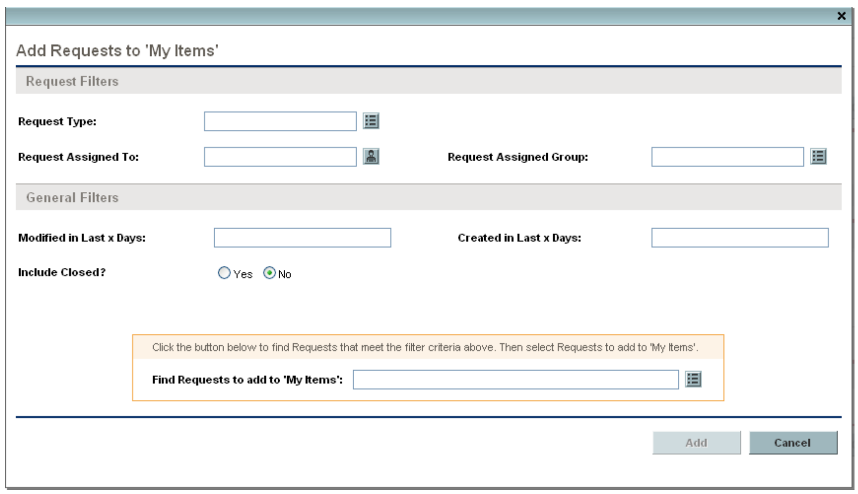
Add the items of interest to the My Items list and repeat this step as needed to add other items.

Adding Requests to the My Items List

To add requests to the My Items list:

1. From the **Add to 'My Items'** button, click **Add Request.**

   The Add Requests to 'My Items' window opens.



2. Complete the filter fields as described in the table below.

Field Name	Description
Request Filters section	
Request Type	Limits the list of requests to those with the request type you specify.
Request Assigned To	Limits the list of requests to those assigned to the user you specify.
Request Assigned Group	Limits the list of requests to those with the Request Assigned Group you specify from a list of security groups.

Field Name	Description
General Filters section	
Modified in Last x days	Limits the list of requests to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of requests to those that were created within the number of days you specify.
Include Closed	Indicates whether to include closed requests in the list of requests.
Search based on filter criteria specified above	
Find Requests to add to 'My Items'	Applies your filter criteria when you click the auto-complete icon on the right. From the list of requests that appears, click the ones in the **Available** column that you want to add to the My Items list, and click **OK** to add them to the text box for this field.

3. Click the auto-complete icon to the right of the text box for the **Find Requests to add to 'My Items'** field.

   The requests that meet your filter criteria are listed in the **Available** column in a new window.

4. Click the specific desired requests in the **Available** column.

   The requests you select move to the **Selected** column.

5. Click **OK** to return to the Add Requests to 'My Items' window.

   The requests you selected appear in the text box for the **Find Requests to add to 'My Items'** field.

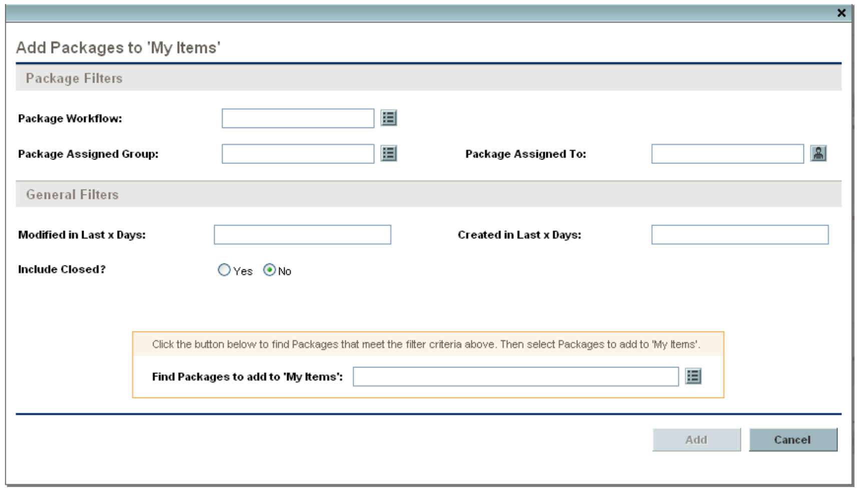
6. Click **Add** to add the requests to the My Items list.

Adding Packages to the My Items List

To add packages to the My Items list:

1. From the **Add to 'My Items'** button, click **Add Package.**

   The Add Packages to 'My Items' window opens.



2. Complete the filter fields as described in the table below.

Field Name	Description
Package Filters section	
Package Workflow	Limits the list of packages to those with the workflow you specify.
Package Assigned Group	Limits the list of packages to those with the Package Assigned Group you specify from a list of security groups.
Package Assigned To	Limits the list of packages to those assigned to the user you specify.
General Filters section	
Modified in Last x days	Limits the list of packages to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of packages to those that were created within the number of days you specify.
Include Closed	Indicates whether to include closed packages in the list of packages.

Field Name	Description
Search based on filter criteria specified above	
Find Packages to add to 'My Items'	Applies your filter criteria when you click the auto-complete icon on the right. From the list of packages that appears, click the ones in the **Available** column that you want to add to the My Items list, and click **OK** to add them to the text box for this field.

3. Click the auto-complete icon to the right of the text box for the **Find Packages to add to 'My Items'** field.

   The packages that meet your filter criteria are listed in the **Available** column in a new window.

4. Click the specific desired packages in the **Available** column.

   The packages you select move to the **Selected** column.

5. Click **OK** to return to the Add Packages to 'My Items' window.

   The packages you selected appear in the text box for the **Find Packages to add to 'My Items'** field.

6. Click **Add** to add the packages to the My Items list.

Adding Projects or Tasks to the My Items List

As with adding other work item types to the My Items list, adding projects or tasks involves specifying filter criteria. However, when you add projects or tasks to the My Items list, HP Time Management displays only the projects, summary tasks, and tasks for which you are allowed to log time.

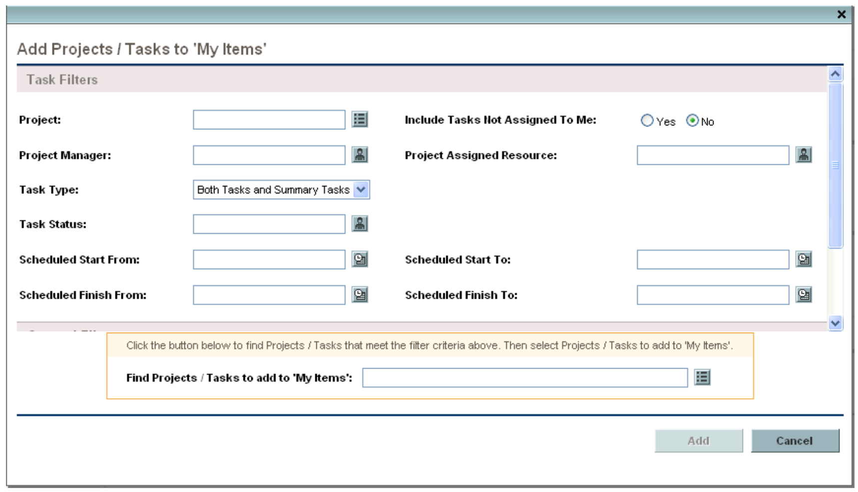
The section *Tasks for Which You Can Log Time* on page 47 explains which of a project's summary tasks and tasks HP Time Management allow resources to log time against them; the information in that section can help project managers understand which tasks are available to which resources. If you only create and submit time sheets, you probably do not need to understand these details, and you can continue with this procedure to add tasks to the My Items list.

> If you do not see work items for which you think you should be able to log time, contact the project manager.

To add tasks to the My Items list:

1. From the **Add to 'My Items'** button, click **Add Project / Task.**

   The Add Projects / Tasks to 'My Items' window opens.



2. Complete the filter fields as described in the table below.

Field Name	Description
Task Filters section	
Project	Limits the list of tasks to those in the project you specify.
Include Tasks Not Assigned To Me	If set to **Yes,** includes tasks that are not assigned to you but for which you are allowed to log time. Any project settings that limit who can log time on projects continue to apply. If you select this checkbox, HP strongly recommends that you specify other filters such as **Project** to significantly limit the number of resulting tasks. If set to **No,** excludes tasks that are not assigned to you.
Project Manager	Limits the list of tasks to those in projects that have the project manager you specify.
Project Assigned Resource	Limits the list of tasks to those with the assigned resource you specify.
Task Type	Limits the list to only projects, only tasks, only summary tasks, or both tasks and summary tasks.
Task Status	Limits the list to tasks of a particular status.

Field Name	Description
Scheduled Start From	Limits the list of tasks to those that start on the date you specify or later.
Scheduled Start To	Limits the list of tasks to those that start on the date you specify or earlier.
Scheduled Finish From	Limits the list of tasks to those that finish on the date you specify or later.
Scheduled Finish To	Limits the list of tasks to those that finish on the date you specify or earlier.
General Filters section (if necessary, scroll down to view)	
Modified in Last x days	Limits the list of tasks to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of tasks to those that were created within the number of days you specify.
Include Closed	Indicates whether to include tasks that are complete and whose projects still allow time to be logged.
Search based on filter criteria specified above	
Find Projects / Tasks to add to 'My Items'	Applies your filter criteria when you click the auto-complete icon on the right. From the list of tasks that appears, click the ones in the **Available** column that you want to add to the My Items list, and click **OK** to add them to the text box for this field.

3. Click the auto-complete icon to the right of the text box for the **Find Projects / Tasks to add to 'My Items'** field.

   The projects and tasks that meet your filter criteria are listed in the **Available** column in a new window.

4. Click the specific desired projects and tasks in the **Available** column.

   The projects and tasks you select move to the **Selected** column.

5. Click **OK** to return to the Add Projects / Tasks to 'My Items' window.

   The projects and tasks you selected appear in the text box for the **Find Projects / Tasks to add to 'My Items'** field.

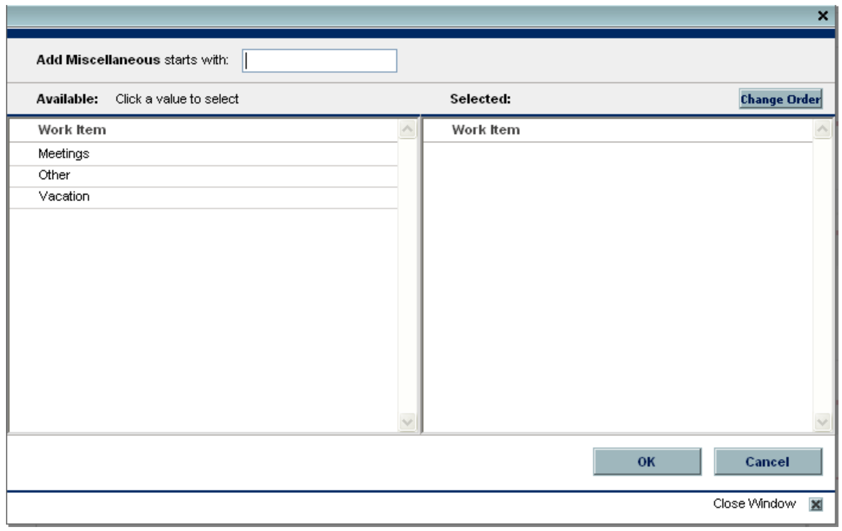
6. Click **Add** to add the projects and tasks to the My Items list.

Adding Miscellaneous Items to the My Items List

To add miscellaneous items to the My Items list:

1. From the **Add to 'My Items'** button, click **Add Miscellaneous.**

   A window to add miscellaneous items opens.



2. (Optional) In the **Add Miscellaneous starts with** field, specify the starting letters of the items you want to access.
3. Click the specific items of interest in the list that appears.

   The items move from the **Available** column to the **Selected** column.
4. Click **OK** to add the selected miscellaneous items to the My Items list.

Deleting Items from the My Items List

To delete items from the My Items list:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add from My Items / Suggested Items.**

   The Add Items to Time Sheet window opens to the **My Items** tab.
2. Select the checkboxes next to the items you want to delete, or select the **Check all** checkbox.
3. Click **Remove Item(s).**

Adding Items from the My Items List to a Time Sheet

To add items from the My Items list to a time sheet:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add from My Items / Suggested Items.**

   The Add Items to Time Sheet window opens to the **My Items** tab.

2. Select the checkboxes of the items you want to add to the time sheet and click **Add** at the bottom of the window.

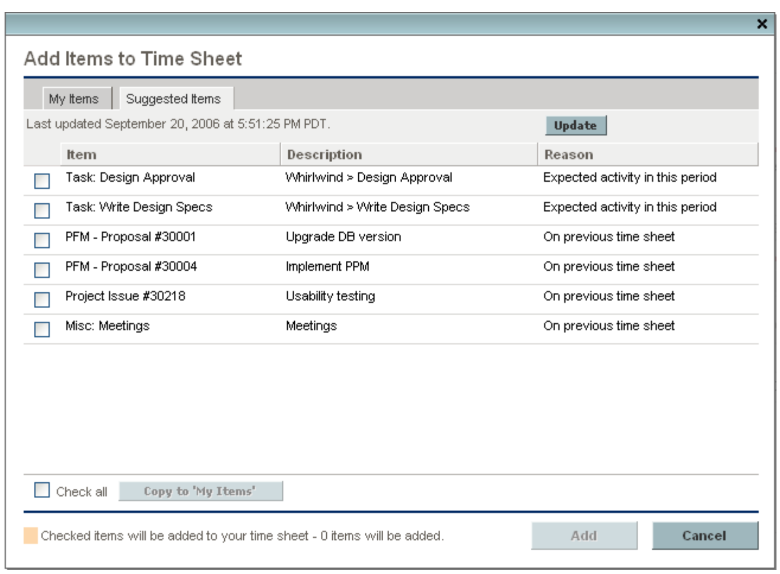
   The items are added to the time sheet (but they are not duplicated if they are already on the time sheet). The items also remain in the My Items list.

For more information about items you have added to the time sheet and to add other items, see *Adding Work Items to a Time Sheet* on page 31.

Using the Suggested Items List

HP Time Management provides the Suggested Items list to help you easily locate the work items that should probably be on your time sheet, so that you do not need to search for them. These items include those to which you are assigned and scheduled to work on during the current time period, and those that were on your previous time sheet and are still open. HP Time Management automatically generates the Suggested Items list and presents it on the **Suggested Items** tab, as in the example in *Figure 2-2*.

Figure 2-2. Example Suggested Items list



By default, the Suggested Items list includes the following items, excluding any that are already on the time sheet:

- Work items of any type
  - That are on your time sheet from the previous time period

    and

  - That you can still log time against (because they are not closed)
- Projects or tasks
  - That are assigned to you

    and

  - That can have time logged against them during this time sheet's time period, which are the tasks with a status of either:
    - Ready, with a scheduled start-to-finish date range that overlaps at least part of the time sheet's time period

      or

    - In Progress

The **Suggested Items** tab states when the Suggested Items list was last updated. To ensure that the Suggested Items list is up to date, click **Update.**

In addition to the **Item** and **Description** columns, the Suggested Items list includes a **Reason** column that indicates why the item was included in the list.

Adding Items from the Suggested Items List to a Time Sheet

To add items from the Suggested Items list to a time sheet:

1. If you have not already done so, on the time sheet, click the **Add Items** button and then click **Add from My Items / Suggested Items.**

   The Add Items to Time Sheet window opens to the **My Items** tab.

2. Click the **Suggested Items** tab.

3. Select the checkboxes next to the items you want to add to the time sheet, or select the **Check all** checkbox.

4. Click **Add.**

   When the items are added to the time sheet, they are removed from the Suggested Items list.

5. For more information about items you have added to the time sheet and to add other items, see *Adding Work Items to a Time Sheet* on page 31.

Adding Items from the Suggested Items List to the My Items List

The My Items list is a list of items that you create and maintain for your convenience on the **My Items** tab. Unless you delete them, items in the My Items list remain available to add to all subsequent time sheets. For more information, see *Using the My Items List* on page 32.

To add items from the Suggested Items list to the My Items list:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add from My Items / Suggested Items.**

   The Add Items to Time Sheet window opens to the **My Items** tab.

2. Click the **Suggested Items** tab.

3. Select the checkboxes next to the items you want to copy to the My Items list, or select the **Check all** checkbox.

4. Click **Copy to 'My Items'.**

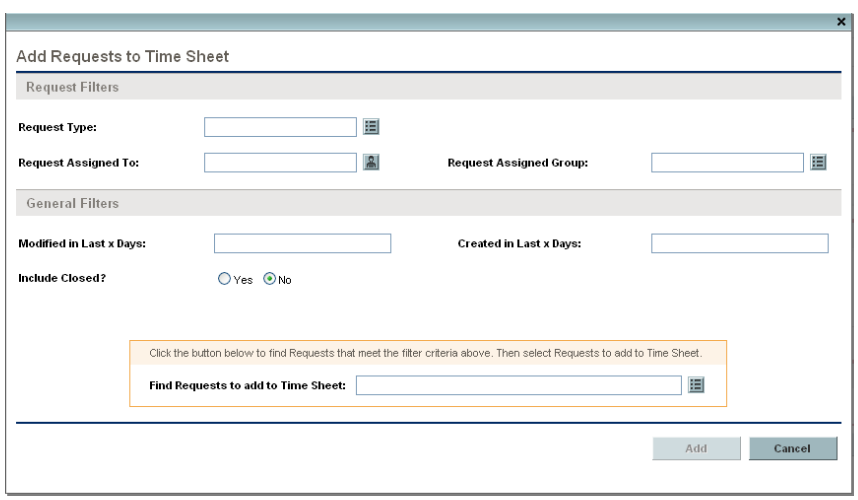
   After the items are copied to the My Items list, they remain in the Suggested Items list.

Adding Requests Directly to a Time Sheet

To add requests to the time sheet:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add Request.**

   The Add Requests to Time Sheet window opens.



2. Complete the filter fields as described in the table below.

Field Name	Description
Request Filters section	
Request Type	Limits the list of requests to those with the request type you specify.
Request Assigned To	Limits the list of requests to those assigned to the user you specify.
Request Assigned Group	Limits the list of requests to those with the Request Assigned Group you specify from a list of security groups.
General Filters section	
Modified in Last x days	Limits the list of requests to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of requests to those that were created within the number of days you specify.
Include Closed	Indicates whether to include closed requests in the list of requests.
Search based on filter criteria specified above	
Find Requests to add to Time Sheet	Applies your filter criteria when you click the auto-complete icon on the right. From the list of requests that appears, click the ones in the **Available** column that you want to add to the time sheet, and click **OK** to add them to the text box for this field.

3. Click the auto-complete icon to the right of the text box for the **Find Requests to add to Time Sheet** field.

   The requests that meet your filter criteria are listed in the **Available** column in a new window.

4. Click the specific desired requests in the **Available** column.

   The requests you select move to the **Selected** column.

5. Click **OK** to return to the Add Requests to Time Sheet window.

   The requests you selected appear in the text box for the **Find Requests to add to Time Sheet** field.

6. Click **Add** to add the requests to the time sheet.

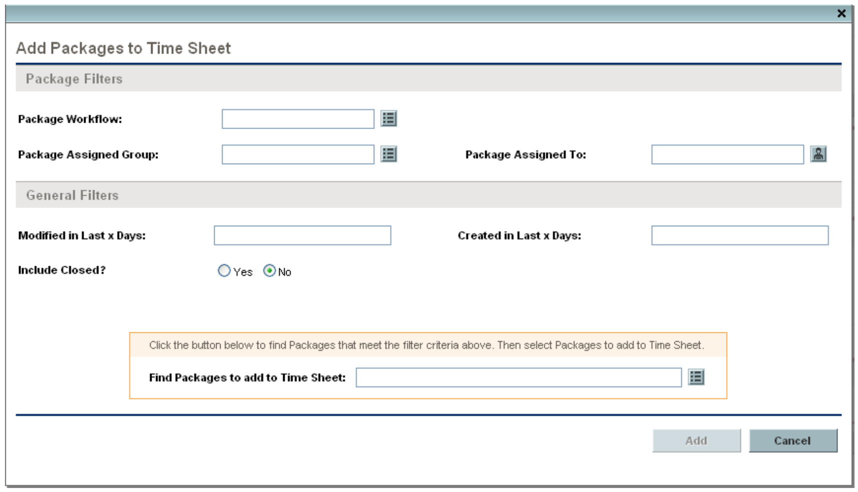
7. For more information about items you have added to the time sheet and to add other items, see *Adding Work Items to a Time Sheet* on page 31.

Adding Packages Directly to a Time Sheet

To add packages to the time sheet:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add Package.**

   The Add Packages to Time Sheet window opens.



2. Complete the filter fields as described in the table below.

Field Name	Description
Package Filters section	
Package Workflow	Limits the list of packages to those with the workflow you specify.
Package Assigned Group	Limits the list of packages to those with the Package Assigned Group you specify from a list of security groups.
Package Assigned To	Limits the list of packages to those assigned to the user you specify.
General Filters section	
Modified in Last x days	Limits the list of packages to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of packages to those that were created within the number of days you specify.
Include Closed	Indicates whether to include closed packages in the list of packages.

Field Name	Description
Search based on filter criteria specified above	
Find Packages to add to Time Sheet	Applies your filter criteria when you click the auto-complete icon on the right. From the list of packages that appears, click the ones in the **Available** column that you want to add to the time sheet, and click **OK** to add them to the text box for this field.

3. Click the auto-complete icon to the right of the text box for the **Find Packages to add to Time Sheet** field.

   The packages that meet your filter criteria are listed in the **Available** column in a new window.

4. Click the specific desired packages in the **Available** column.

   The packages you select move to the **Selected** column.

5. Click **OK** to return to the Add Packages to Time Sheet window.

   The packages you selected appear in the text box for the **Find Packages to add to Time Sheet** field.

6. Click **Add** to add the packages to the time sheet.

7. For more information about items you have added to the time sheet and to add other items, see *Adding Work Items to a Time Sheet* on page 31.

Adding Projects or Tasks Directly to a Time Sheet

As with adding other work item types to a time sheet, adding projects or tasks involves specifying filter criteria. However, when you add projects or tasks to the time sheet, HP Time Management displays only the projects, summary tasks, and tasks for which you are allowed to log time.

The section *Tasks for Which You Can Log Time* on page 47 explains which of a project's summary tasks and tasks HP Time Management allow resources to log time against them; the information in that section can help project managers understand which tasks are available to which resources. If you only create and submit time sheets, you probably do not need to understand these details, and you can continue with the procedure *Adding Projects or Tasks to the Time Sheet* on page 49.

➤ If you do not see work items for which you think you should be able to log time, contact the project manager.

Tasks for Which You Can Log Time

This section provides detailed information about how HP Time Management automatically limits which summary tasks and which tasks you can view and then add to your My Items list or directly to a time sheet. If you are completing a time sheet, you probably do not need to understand these details, and you can proceed to add tasks to your My Items list (see *Adding Projects or Tasks to the My Items List* on page 37) or to your time sheet (see *Adding Projects or Tasks to the Time Sheet* on page 49). With these details, project managers can understand which tasks are made available to which resources, and they can configure the applicable settings as described in Chapter 6, *Integrating Time Management and Project Management,* on page 111.

The constraints described below remain in effect whether or not the resource selects the **Include Tasks Not Assigned To Me** checkbox when adding tasks to a time sheet or to the My Items list.

The set of tasks you can view and add to a time sheet is based on a combination of the following settings in the parent project:

- The level at which the project tracks time, based on business needs. The options are:
  - Task level
  - Summary tasks at a specified hierarchy level
  - Project level
- Who is allowed to log time for the project. The options are:
  - **Project resources.** Resources assigned to tasks, resources in the staffing profile, and summary task owners can log time against any task in the project.
  - **Assigned resources.** (This is the default option.) When time is tracked at the task level, resources who are assigned to the task can log time against it. When time is tracked by summary task at a particular hierarchy level, resources who are assigned to tasks at any lower level can log time against that summary task.
  - **All resources.** All resources who can see the project can log time against any task in the project.

For example, suppose project PROJ includes:

- Phase 1, a level-2 summary task that includes the following tasks:
  - Develop, which is assigned to resource User1
  - Test, which is unassigned
- Phase 2, a level-2 summary task that includes the following summary task:
  - Sub-Phase A, a level-3 summary task that includes the following task:
    - Deploy, which is assigned to resource User2

The entries in *Table 2-3* show the project, summary tasks, and tasks for which User1 and User2 can log time, depending on the combination of project settings that specify the level at which time is tracked on project PROJ and who is allowed to log time on project PROJ. In this example:

- If time is tracked for the project at summary task level 3, and if all resources who can view PROJ are allowed to log time for it, then everyone logs time on Sub-Phase A, which is the only level-3 summary task.
- If time is tracked for the project at summary task level 3, and if only assigned resource User1 is allowed to log time for the project, then User1 cannot log any time because the only task to which User1 is assigned, namely Develop, is not under a level-3 summary task.
- If time is tracked for the project at summary task level 3, and if only assigned resource User2 is allowed to log time for the project, then User2 can log time on only Sub-Phase A.
- If time is tracked at the task level, and if only assigned resource User2 is allowed to log time for the project, then User2 can log time on only the Deploy task, to which he is assigned.

Table 2-3. Example: project, summary tasks, and tasks for which resources can log time

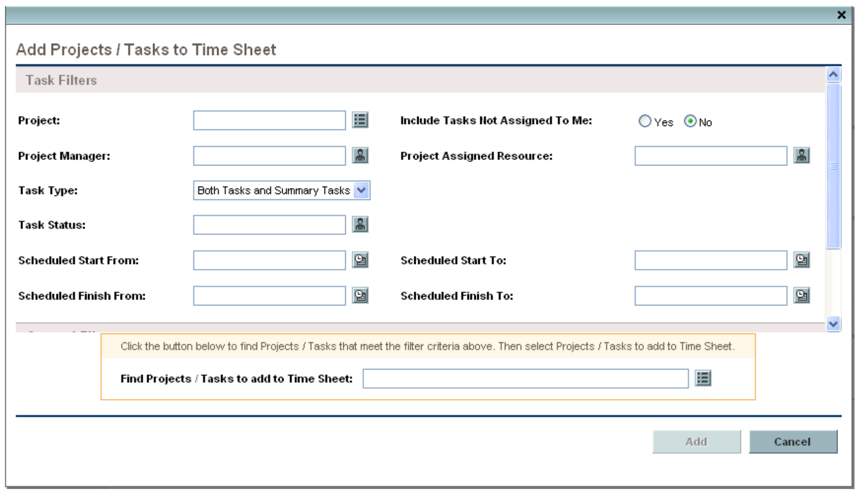
Who Is Allowed to Log Time for PROJ?		What is the Level at Which Time Is Tracked on PROJ?			
		Project Level	Summary Task Level 2	Summary Task Level 3	Task Level
All resources who can view PROJ (including User1 and User2)		PROJ	Phase 1, Phase 2	Sub-Phase A	Develop, Test, Deploy
All project resources for PROJ (including User1 and User2)		PROJ	Phase 1, Phase 2	Sub-Phase A	Develop, Test, Deploy
Assigned resource	User1	PROJ	Phase 1		Develop
	User2	PROJ	Phase 2	Sub-Phase A	Deploy

Adding Projects or Tasks to the Time Sheet

To add tasks to the time sheet:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add Task.**

   The Add Projects / Tasks to Time Sheet window opens.



2. Complete the filter fields as described in the table below.

Field Name	Description
Task Filters section	
Project	Limits the list of tasks to those in the project you specify.
Include Tasks Not Assigned To Me	If set to **Yes,** includes tasks that are not assigned to you but for which you are allowed to log time. Any project settings that limit who can log time on projects continue to apply. If you select this checkbox, HP strongly recommends that you specify other filters such as **Project** to significantly limit the number of resulting tasks. If set to **No,** excludes tasks that are not assigned to you.
Project Manager	Limits the list of tasks to those in projects that have the project manager you specify.
Project Assigned Resource	Limits the list of tasks to those with the assigned resource you specify.
Task Type	Limits the list to only projects, only tasks, only summary tasks, or both tasks and summary tasks.

Field Name	Description
Task Status	Limits the list to tasks of a particular status.
Scheduled Start From	Limits the list of tasks to those that start on the date you specify or later.
Scheduled Start To	Limits the list of tasks to those that start on the date you specify or earlier.
Scheduled Finish From	Limits the list of tasks to those that finish on the date you specify or later.
Scheduled Finish To	Limits the list of tasks to those that finish on the date you specify or earlier.
General Filters section (if necessary, scroll down to view)	
Modified in Last x days	Limits the list of tasks to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of tasks to those that were created within the number of days you specify.
Include Closed	Indicates whether to include tasks that are complete and whose projects still allow time to be logged.
Search based on filter criteria specified above	
Find Projects / Tasks to add to Time Sheet	Applies your filter criteria when you click the auto-complete icon on the right. From the list of tasks that appears, click the ones in the **Available** column that you want to add to the time sheet, and click **OK** to add them to the text box for this field.

3. Click the auto-complete icon to the right of the text box for the **Find Projects / Tasks to add to Time Sheet** field.

   The projects and tasks that meet your filter criteria are listed in the **Available** column in a new window.

4. Click the specific desired projects and tasks in the **Available** column.

   The projects and tasks you select move to the **Selected** column.

5. Click **OK** to return to the Add Projects / Tasks to Time Sheet window.

   The projects and tasks you selected appear in the text box for the **Find Tasks to add to Time Sheet** field.

6. Click **Add** to add the projects and tasks to the time sheet.

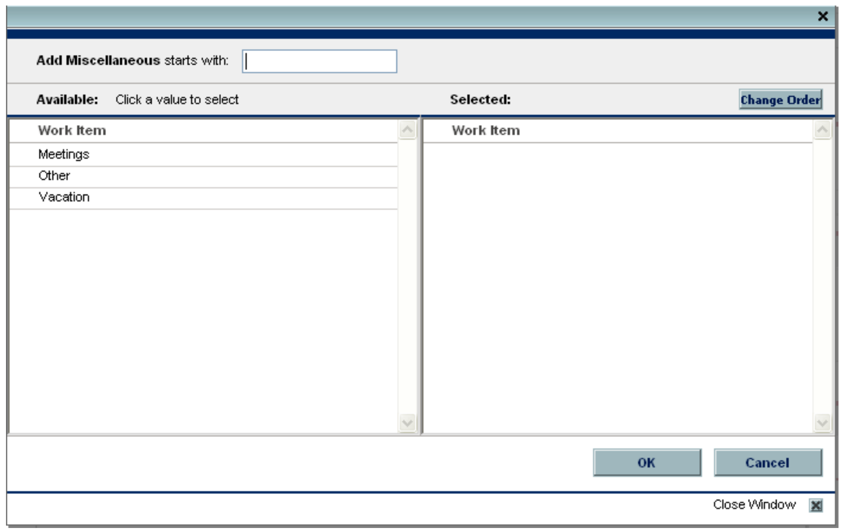
7. For more information about items you have added to the time sheet and to add other items, see *Adding Work Items to a Time Sheet* on page 31.

Adding Miscellaneous Items Directly to a Time Sheet

To add miscellaneous items to the time sheet:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add Miscellaneous.**

   A window to add miscellaneous items opens.



2. (Optional) In the **Add Miscellaneous starts with** field, specify the starting letters of the items you want to access.
3. Click the specific items of interest in the list that appears.

   The items move from the **Available** column to the **Selected** column.
4. Click **OK** to add the selected miscellaneous items to the time sheet.
5. For more information about items you have added to the time sheet and to add other items, see *Adding Work Items to a Time Sheet* on page 31.

Deleting Items (Lines) from a Time Sheet

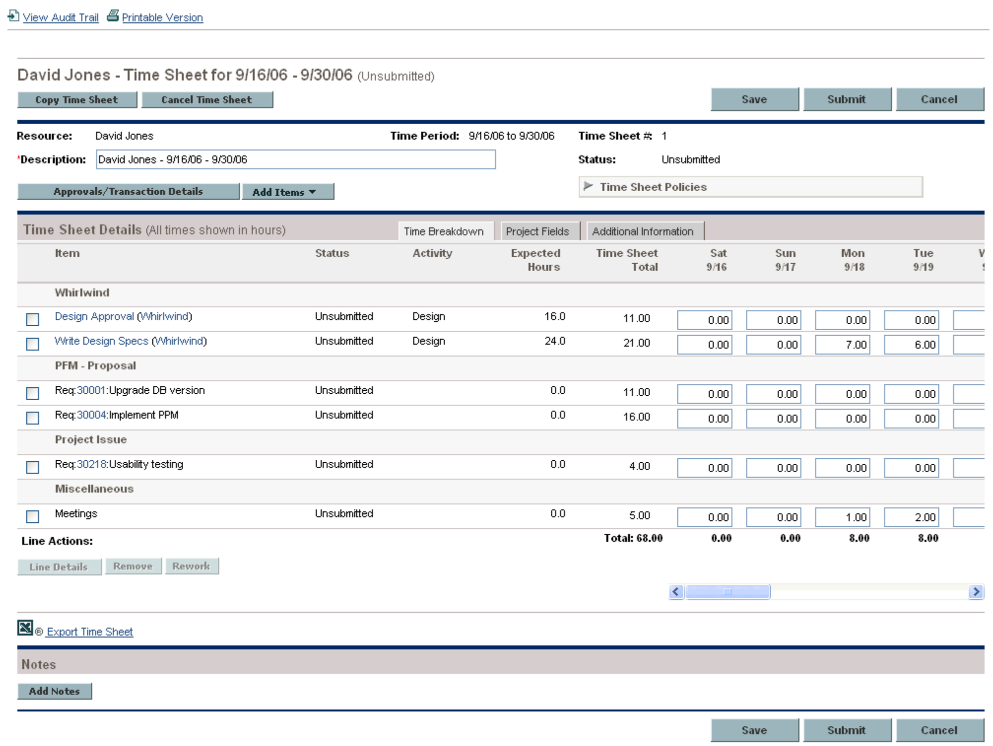
To delete a work item (time sheet line) from a time sheet:

1. If you have not already done so, search for and open the time sheet of interest. See *Searching Time Sheets* on page 65. For an example of a time sheet that has been opened, see *Figure 2-1* on page 27.
2. Select the checkboxes to the left of the items you want to delete.
3. Under the **Line Actions** heading, click **Remove.**
4. Click **Save** to save the updated time sheet.

Reporting Time on the Time Breakdown Tab

Figure 2-3 shows an example of the **Time Breakdown** tab, where you report the time you worked on the time sheet's work items. This tab is displayed by default.

Figure 2-3. Example time sheet, Time Breakdown tab



The columns in the **Time Sheet Details** section of the **Time Breakdown** tab are described in *Table 2-4*. Except for the columns to enter time, they are read-only.

Table 2-4. Time Sheet Details, Time Breakdown tab fields

Field Name	Description
Item	The names and truncated Descriptions of each item (work item).
Status	The status of each item (time sheet line). For summary information about time sheet line statuses, see *Summary of Time Sheet Line Statuses and Time Sheet Statuses* on page 64.
Activity	An activity for the item. One item can be divided into multiple activities, displayed one per line. This allows you to enter time worked for each activity of the item. See *Using Activities to Categorize Time To Be Tracked* on page 18.
Expected Hours	The number of hours specified in the associated work allocation or, for projects, the resource's scheduled effort.
Time Sheet Total	The total number of actual hours entered (in the columns to the right) for this item (row). This field is updated automatically as you make entries for individual dates or time periods in the columns to the right.
[Columns to enter time]	Your breakdown by day or time period of the actual time you worked on this item. (Use the horizontal scroll bar under these columns as needed.)
Total	The total number of actual hours entered (in the columns to the right) for this time sheet. This field is updated automatically as you make entries for individual items.

On the time sheet, the work items (time sheet lines) are logically organized in the following order, under headings as described:

- All tasks, grouped under the names of their specific projects
- All requests, grouped under the names of their specific request types
- All miscellaneous items, such as vacation and meetings, grouped under the heading **Miscellaneous**
- All packages, grouped under the names of their package workflows

For example, in *Figure 2-3*:

- The heading **Whirlwind** is a particular project, and below it are two of its tasks.
- The headings **PFM - Proposal** and **Project Issue** are particular request types, and below them are specific requests of those types.
- The heading **Miscellaneous** includes the Meetings work item.

Individual items, each with a checkbox to the left and the fields described in *Table 2-4*, appear under the appropriate heading.

The number of columns you use to report time worked on the various work items and the way you enter time vary according to the period type and the method of time entry specified in the time sheet policy the administrator has assigned to you.

The period type can be:

- Weekly
- Bi-weekly (exactly two weeks)
- Semi-monthly (with two time periods per month—the first from the 1st through the 15th of a month, and the second from the 16th through the end of a month, as in the example in *Figure 2-3* on page 52)
- Monthly

You report time in the boxes in the column or columns in one of the following ways:

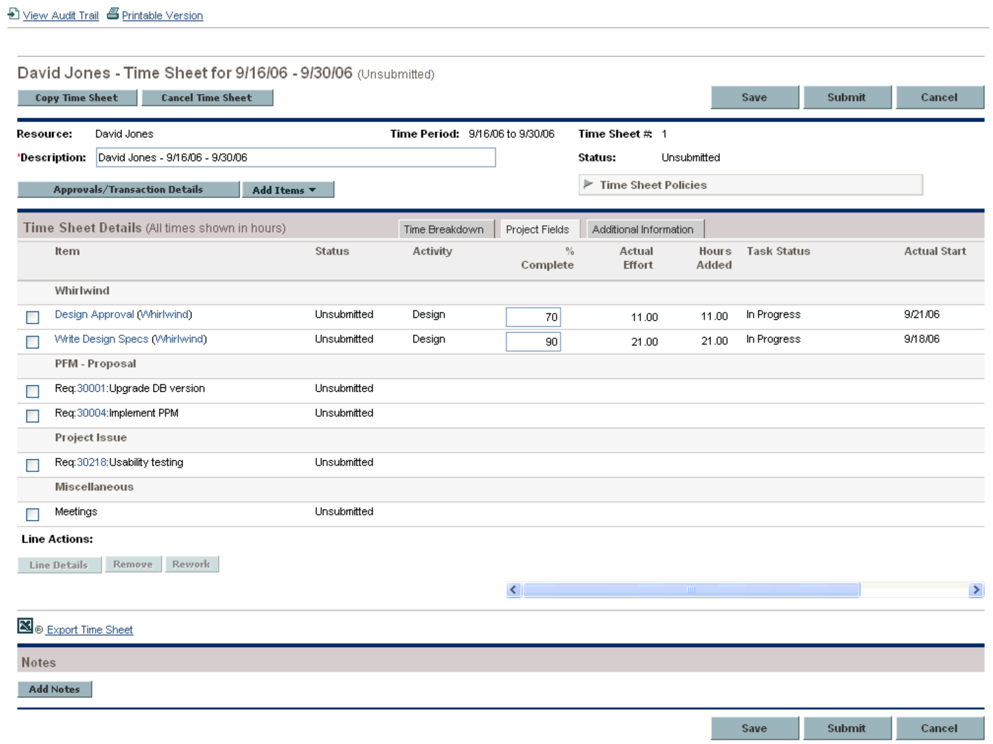
- By the number of hours you worked on each work item each day (as in the example in *Figure 2-3* on page 52). There is one column for each day of the time period, and the number of columns depends on the period type as described above (7 for weekly, 14 for bi-weekly, and so on).
- By the total number of hours you worked on each work item over the entire time period. There is only one column to enter time in hours for the entire time period.
- By the percentages of time you worked on each work item over the entire time period. There is only one column to enter a percentage of the entire time period's time for each work item. For this option, the administrator can configure HP Time Management so that each time period has a fixed number of total hours or so that each time period has a fixed number of hours each workday multiplied by the variable number of workdays per time period. From the percentages you enter, HP Time Management calculates hours for the time period.

  For example, suppose that the time period is monthly; you enter time in percentage over the entire time period; the amount of time in the time period is specified to vary by the number of workdays, with eight hours a day; and you create a time sheet for a month that has 22 working days. If you enter `10` percent for the work item of Meetings, HP Time Management will display and report that time for Meetings as 10% of 22 days * 8 hours/day, or 17.60 hours.

Completing the Project Fields Tab

Figure 2-4 shows an example of the **Project Fields** tab of the Edit Time Sheet page. The fields on this tab are used only for project or task work items.

Figure 2-4. Example time sheet, Project Fields tab



The **Item, Status,** and **Activity** columns on the **Project Fields** tab are the same as on the **Time Breakdown** tab.

To the right of these columns is a set of fields (columns) unique to the **Project Fields** tab. (Scrolling to the right reveals additional fields.) These fields are used only for tasks in projects for which a project manager has integrated HP Time Management and HP Project Management; they are not used for other types of work items. Having these fields (columns) available on the time sheet's **Project Fields** tab to report "actuals" makes it unnecessary to access HP Project Management to report the same actuals. Which fields are visible can vary from project to project, depending on how the project manager has configured the project. For information about configuring this aspect of integration, see *Integration of HP Time Management and HP Project Management* on page 77.

The unique fields on the **Project Fields** tab include **% Complete, Actual Effort, Hours Added, Task Status, Actual Start,** and **Actual Finish.** If configured for this project, **Estimated Remaining Effort** and **Estimated Finish Date** fields are also displayed.

The **% Complete, Actual Effort, Actual Start, Actual Finish, Estimated Remaining Effort,** and **Estimated Finish Date** fields reflect your personal *total* contributions to that task for the cumulative time you have reported on time sheets; any contributions that others have made are excluded.

The **Hours Added** field indicates the time you have added to the task since you opened the time sheet.

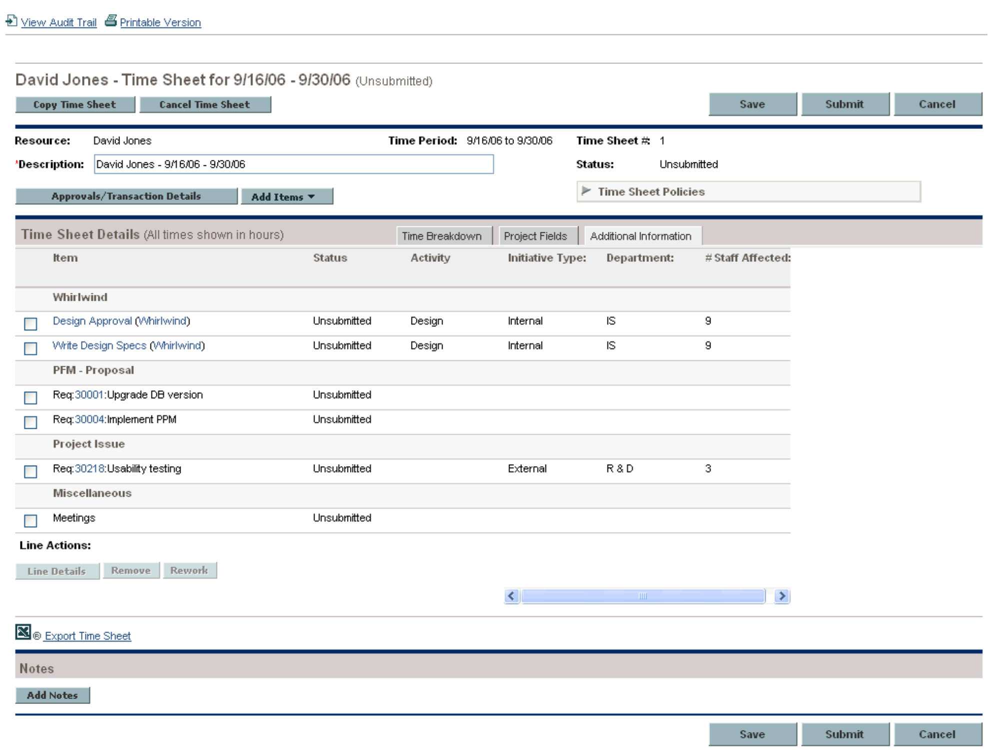
Displaying the Additional Information Tab

If your HP Time Management administrator has configured custom data fields for you to enter on time sheet lines, those fields (columns) are consolidated for the entire time sheet on the **Additional Information** tab of the Edit Time Sheet page. *Figure 2-5* shows an example of the tab with three user data fields, to the right of the **Status** and **Activity** columns, where all three fields have been specified for three particular work items.

The administrator can require that users specify some or all of the user data fields. In this example, none of the fields are required, as reflected by the fact that some work items have none of them specified.

The user data fields in this tab are for display only. For information about editing the fields, see *User Data Tab* on page 60.

Figure 2-5. Example time sheet, Additional Information tab



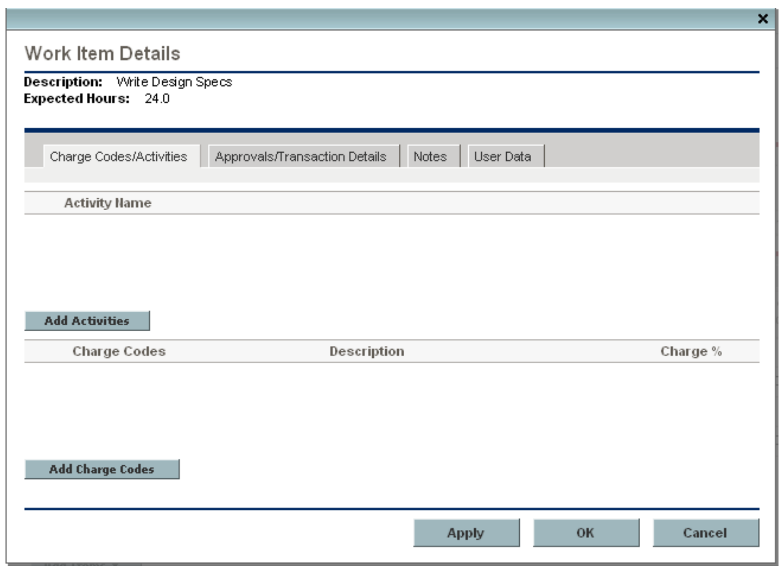
Viewing and Specifying Time Sheet Line Details (Work Item Details)

Selecting exactly one time sheet line in the checkboxes of the left-most column of a time sheet and clicking the **Line Details** button opens the Work Item Details window for that time sheet line. This window includes tabs that are associated with the selected time sheet line, as described in the following sections. Each tab displays the selected work item's **Description** and **Expected Hours** fields.

Charge Codes/Activities Tab

The **Charge Codes/Activities** tab allows you to view and add charge codes (with percentages) and activities associated with this time sheet line (work item). See the example in *Figure 2-6*.

Figure 2-6. Work Item Details, Charge Codes/Activities tab



Click **Add Charge Codes** and select from the predefined charge codes as necessary to specify the charge codes for this work item. You can also specify the percentage breakdown (to a tenth of a percent) when the cost applies to several charge codes. The values must total 100%. For information about configuring charge codes, see the *HP Time Management Configuration Guide.*

Click **Add Activities** and select from the predefined activities as necessary to specify the activities to be associated with this work item. This information can be useful for reporting of total work by multiple resources on each activity, and for future planning estimates. For information about activities, see *Using Activities to Categorize Time To Be Tracked* on page 18.

If a task in a work plan has a specified activity, that task can have only that one activity and you cannot change it or add any other activity to it. If a task in a work plan has no specified activity, you can select and add one or more predefined activities to that task on the time sheet; multiple activities are not transferred to the work plan, but their total time is.

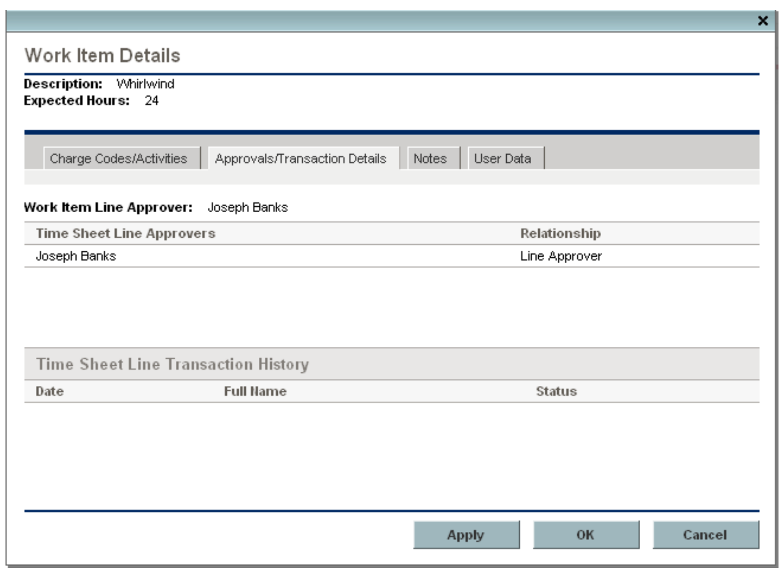
Click **OK** on the Work Item Details window to save your updates.

Approvals/Transaction Details Tab

The top portion of the **Approvals/Transaction Details** tab displays the approvers of this time sheet line. See the example in *Figure 2-7*. The **Work Item Line Approver** field displays the people or group who can approve this work item. The list of **Time Sheet Line Approvers** and **Relationship** shows all the approvers who can approve this work item, including delegates and group members.

The **Time Sheet Line Transaction History** section of this tab displays the transaction history for this time sheet line.

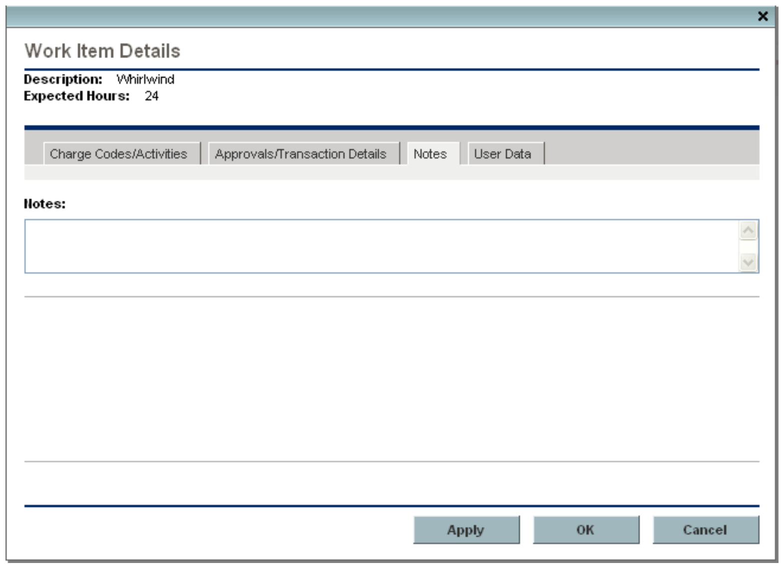
Figure 2-7. Work Item Details, Approvals/Transaction Details tab



Notes Tab

The **Notes** tab allows you to enter notes regarding the selected time sheet line. See *Figure 2-8*.

Figure 2-8. Work Item Details, Notes tab



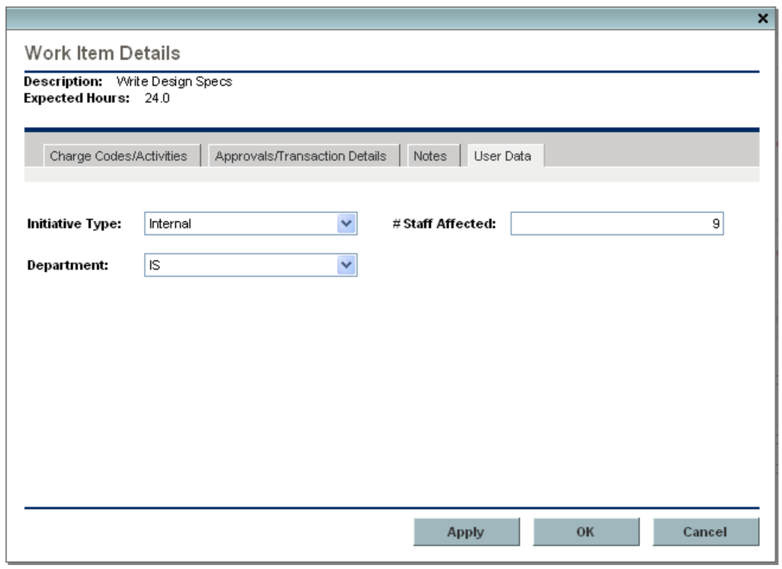
User Data Tab

For each time sheet line, on the **User Data** tab you can specify the custom fields that your administrator has configured. See the example in *Figure 2-9*.

If you have questions about how to complete the fields, contact your administrator or project manager.

These custom user data fields are also displayed on the time sheet's **Additional Information** tab (see *Displaying the Additional Information Tab* on page 56).

Figure 2-9. Work Item Details, User Data tab



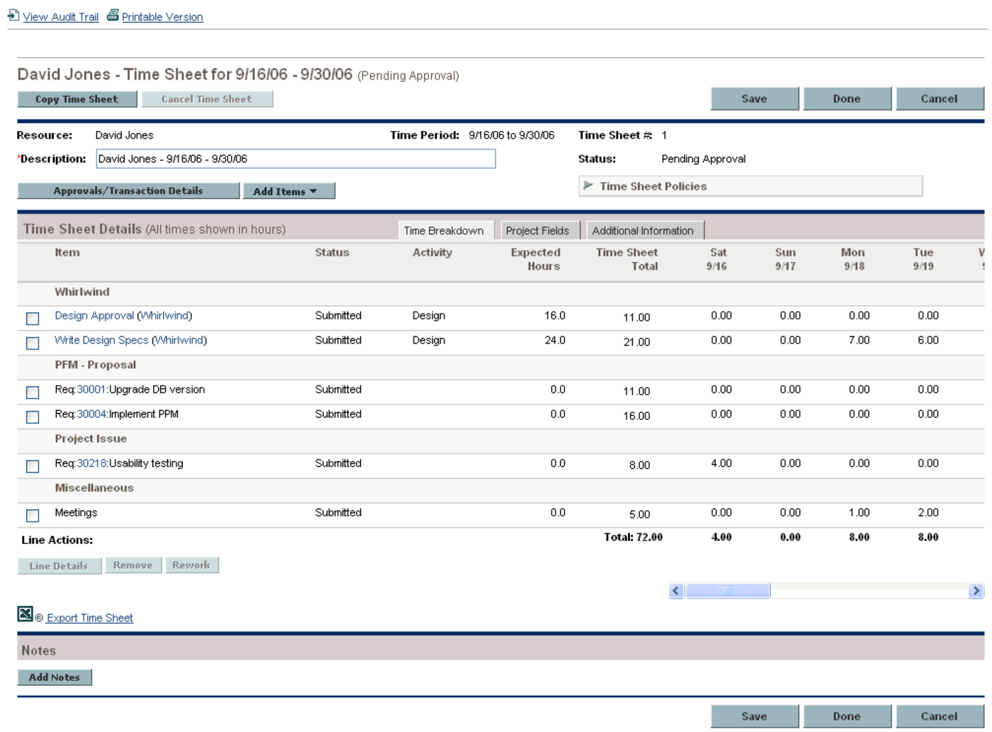
Submitting a Time Sheet

When you have completed your time sheet entries for an entire time period and you want to submit the time sheet for approval of its lines:

1. Search for and open the desired time sheet if it is not already open. See *Searching Time Sheets* on page 65.
2. On the Edit Time Sheet page, click **Submit.**

   Submitting the time sheet submits all of its unsubmitted lines. Time sheet lines cannot be submitted individually.

   The status of each time sheet line is set to Submitted and the status of the time sheet is set to Pending Approval.



Item	Status	Activity	Expected Hours	Time Sheet Total	Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19
Whirlwind								
Design Approval (Whirlwind)	Submitted	Design	16.0	11.00	0.00	0.00	0.00	0.00
Write Design Specs (Whirlwind)	Submitted	Design	24.0	21.00	0.00	0.00	7.00	6.00
PFM - Proposal								
Req:30001:Upgrade DB version	Submitted		0.0	11.00	0.00	0.00	0.00	0.00
Req:30004:Implement PPM	Submitted		0.0	16.00	0.00	0.00	0.00	0.00
Project Issue								
Req:30218:Usability testing	Submitted		0.0	8.00	4.00	0.00	0.00	0.00
Miscellaneous								
Meetings	Submitted		0.0	5.00	0.00	0.00	1.00	2.00
				Total: 72.00	4.00	0.00	8.00	8.00

Time Sheet Approvals and Transaction Details

Clicking the **Approvals/Transaction Details** button for a time sheet opens the **Time Sheet Details - Approval Details/Transaction History** window. All of its fields are read-only.

The **Approval Details** section displays a cumulative list of the time approvers and billing approvers. The **Time Sheet Transaction History** section displays the change history of the time sheet's status. See *Figure 2-10* and *Table 2-5*.

Figure 2-10. Time Sheet Details - Approval Details/Transaction History

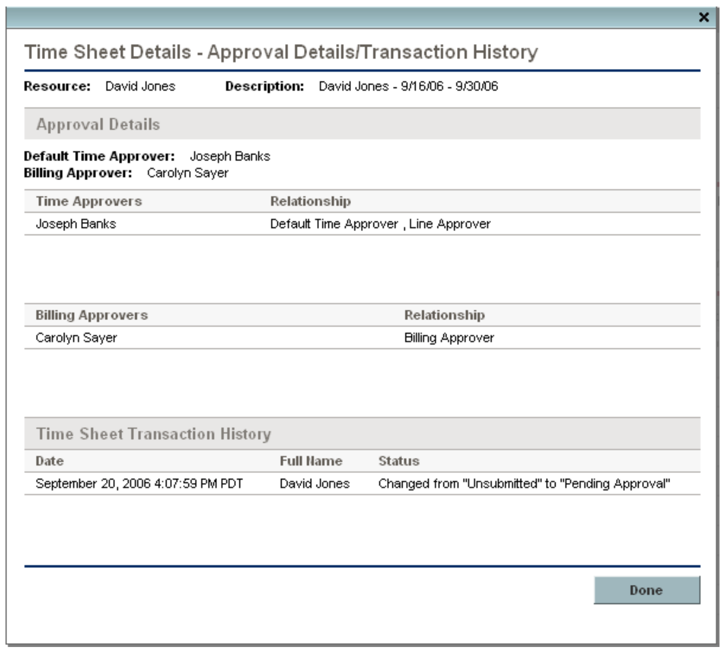


Table 2-5. Time Sheet Details - Approval Details/Transaction History fields

Field Name	Description
Resource	The person for whom the time sheet was created. See *Creating a Time Sheet* on page 24.
Description	The description of the time sheet. See *Creating a Time Sheet* on page 24.
Approval Details section	
Default Time Approver	The person or security group who can view the resource’s time sheets to help guide them through the approval process and resolve issues as may be required. The default time approver is usually given the access grant to approve the resource’s time sheets.
Billing Approver	The people or security group who can freeze or close the time sheet.
Time Approvers *and* Relationship	All the approvers associated with this time sheet’s lines and each one’s relationship to the specified **Resource** (for example, a particular user, a delegate, or a member of a particular security group).
Billing Approvers *and* Relationship	All the billing approvers associated with this time sheet’s lines and each one’s relationship to the specified **Resource** (for example, a particular user, a delegate, or a member of a particular security group).
Time Sheet Transaction History section	
Date	The date the time sheet status changed.
Full Name	The full name of the person who made the change.
Status	The time sheet statuses before and after the change.

Summary of Time Sheet Line Statuses and Time Sheet Statuses

Throughout this guide, the effects of an action on time sheet line status and time sheet status are described in context. For reference, *Table 2-6* summarizes the possible combinations of statuses of the lines on a time sheet, the resulting time sheet status, and the conditions that results in the statuses. Remember that a time sheet can have different approvers for its lines, and a line can have more than one approver.

Table 2-6. Time sheet line statuses and time sheet statuses

Statuses of the Lines on a Time Sheet	Status of the Time Sheet	Condition that Results in the Statuses
All lines are Unsubmitted.	Unsubmitted	The user has never submitted the time sheet (or, after submitting it, he initiated rework of all of its lines and possibly added lines to it, or the approvers rejected all of its lines, or a combination of both).
All lines are Submitted.	Pending Approval	The user submitted (or resubmitted) the time sheet. The approvers have not approved or rejected any lines.
All lines are Approved.	Approved	The approvers approved all the time sheet lines.
Some lines are Submitted; all others are Approved.	Pending Approval	The approvers approved some lines, but not all lines; they have not rejected any lines.
At least one line is Rejected.	In Rework	The approvers rejected the lines that are in Rejected status.
At least one line, but not all lines, are Unsubmitted.	In Rework	The approvers rejected at least one line that the user is reworking, or the user initiated rework on or added at least one line. Lines being reworked or added to any time sheet have a status of Unsubmitted.
All lines are Cancelled.	Cancelled	The user cancelled the time sheet (and thus all of its lines).
All lines are Frozen.	Frozen	The billing approver froze the time sheet (and thus all of its lines).
All lines are Closed.	Closed	The billing approver closed the time sheet (and thus all of its lines).

Searching Time Sheets

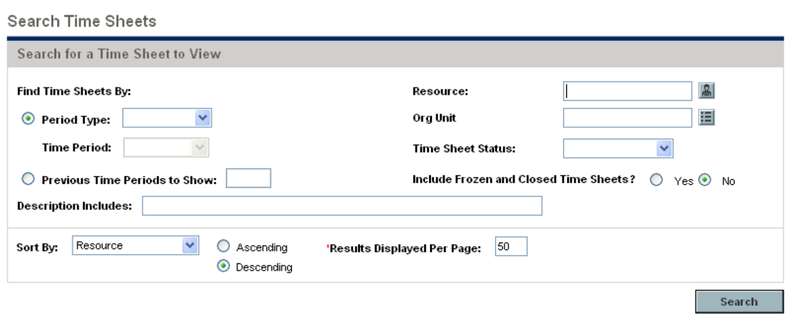
When you search time sheets, in addition to applying any filter criteria you specify in the following procedure, HP Time Management shows you only the time sheets that meet at least one of the following requirements:

- You created the time sheet (or someone created it for you).
- You are the manager of the time sheet's resource.
- You are the delegate of the time sheet's resource.
- You are an approver of at least one line of the time sheet.
- You are the billing approver for the time sheet.

To search for particular time sheets:

1. Log on to PPM Center.
2. From the menu bar, select
   Time Management Time Sheets > Search Time Sheets.

   The Search Time Sheets page appears.



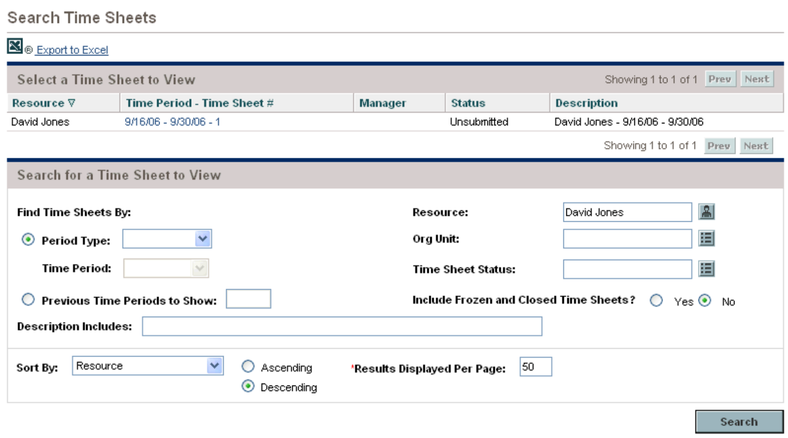
3. On the Search Time Sheets page, enter search and sort criteria as specified in the following table.

Field Name (*Required)	Description
Search criteria	
Period Type (option includes a drop-down list)	When selected, limits the search to time sheets having the period type selected from the drop-down list. Depending on your system's configuration, the list can include the following: ■ **Weekly** (every week, starting by default on a Monday) ■ **Bi-Weekly** (every two weeks, starting by default on a Monday; for example, **3/12/07 - 3/25/07** and **3/26/07 - 4/8/07** are successive bi-weekly time periods in March and April 2007) ■ **Semi-Monthly** (twice a month, where the first time period always ends on the 15th of the month; for example, the two semi-monthly time periods of March 2007 are **3/1/07 - 3/15/07** and **3/16/07 - 3/31/07**) ■ **Monthly** (every full calendar month)
Time Period	Enabled when **Period Type** is selected and a value is chosen for it. Limits the search to a particular time period you select from the drop-down list.
Previous Time Periods to Show (option includes a numeric field)	When selected and specified, applies your search criteria to include time sheets for the number of previous time periods you specify (as well as for current and future time periods).
Resource	Limits the search to time sheets for the resource you specify.
Org Unit	Limits the search to time sheets for the Org Units you specify.

Field Name (*Required)	Description
Time Sheet Status	Limits the search to time sheets having the statuses you specify. The possible time sheet statuses are: ▪ **Unsubmitted** ▪ **Pending Approval** ▪ **In Rework** ▪ **Approved** ▪ **Cancelled** ▪ **Frozen** ▪ **Closed** For more information, see *Summary of Time Sheet Line Statuses and Time Sheet Statuses* on page 64.
Include Frozen and Closed Time Sheets	Whether or not to include frozen and closed time sheets in the search.
Description Includes	Limits the search to time sheets having the text you specify in their Descriptions.
Sort criteria	
Sort By	The parameter (column in the search results) to use to sort the search results. The options are: ▪ **Resource.** The resource the time sheet is for. ▪ **Time Period - Time Sheet #.** The time period of the time sheet followed by its number. ▪ **Manager.** The manager of the **Resource.** ▪ **Status.** The time sheet status. ▪ **Description.** The time sheet description. By default, this is the **Resource,** followed by a hyphen (**-**), followed by the **Time Period.**
Ascending *or* Descending	Displays the results in ascending or descending order.
*Results Displayed Per Page	Sets the maximum number of results to be displayed per page.

4. Click **Search.**

   The Search Time Sheets page is refreshed, with the search results shown in the **Select a Time Sheet to View** section added at the top of the page. The column headings match the **Sort By** options.



5. To open a particular time sheet, click its link in the **Time Period - Time Sheet #** column in the **Select a Time Sheet to View** section.

   The time sheet opens, with the **Time Breakdown** tab displayed, as shown in the example of *Figure 2-1* on page 27.

Editing a Time Sheet

To edit a time sheet:

1. Search for and open the desired time sheet. See *Searching Time Sheets* on page 65.

2. On the Edit Time Sheet page, edit the time sheet as desired and click **Save.** For information about the time sheet fields, see *Understanding Time Sheets and Time Sheet Lines* on page 27.

Delegates can edit time sheets. See *Delegation* on page 81.

Reworking Lines on or Adding Lines to a Submitted Time Sheet

If an approver has rejected any of the lines on a submitted time sheet, the time sheet has a status of In Rework, indicating that you need to take action before the entire time sheet can be approved.

If a submitted time sheet has any lines that have been neither approved nor rejected yet (that is, their status remains Submitted), you can initiate correction ("rework") of those lines or add new lines to the time sheet. After you make your corrections or additions, you will need to resubmit the time sheet.

To rework particular time sheet lines on a submitted time sheet:

1. Search for and open the desired, submitted time sheet. It has a status of Pending Approval. See *Searching Time Sheets* on page 65.
2. On the Edit Time Sheet page, select the checkboxes in the left-most column for the time sheet lines you need to rework.
3. Click the **Rework** button under the **Line Actions** heading.

   The status of the selected time sheet lines becomes Unsubmitted, and the status of the time sheet becomes In Rework (or Unsubmitted if all of its lines have now become Unsubmitted).
4. When you complete your rework activity, update each reworked time sheet line as appropriate in terms of time worked. Also, for each line, click **Line Details,** and complete the work item details as appropriate (see *Viewing and Specifying Time Sheet Line Details (Work Item Details)* on page 57).
5. Click **Save** to save the time sheet or click **Submit** to resubmit the time sheet.

To add time sheet lines to a submitted time sheet:

1. Search for and open the desired, submitted time sheet. It has a status of Pending Approval. See *Searching Time Sheets* on page 65.
2. On the Edit Time Sheet page, click **Add Items** and select the type of item you want to add to the time sheet. For more information, see *Adding Work Items to a Time Sheet* on page 31.

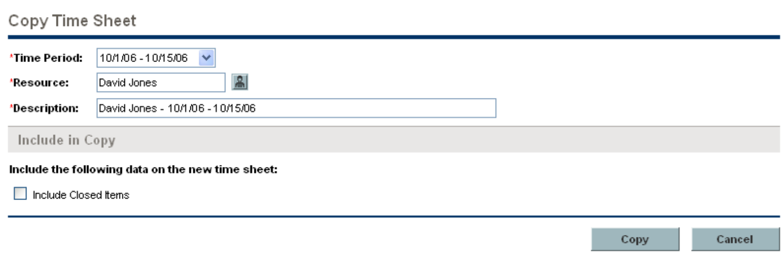
   The status of the new time sheet line is Unsubmitted, and the status of the time sheet becomes In Rework (or Unsubmitted if all of its lines are Unsubmitted).
3. Complete the new time sheet line and click **Save** to save the time sheet.
4. If you are ready to resubmit the time sheet, click **Submit.**

Copying a Time Sheet

To copy an existing time sheet:

1. Search for and open the desired time sheet. See *Searching Time Sheets* on page 65.
2. On the Edit Time Sheet page, click the **Copy Time Sheet** button.

   The Copy Time Sheet page appears.

3. Change the **Time Period** or **Resource** as needed. If your time sheet policy limits you to having only one time sheet in a time period, you will be required to change one or both of these fields.
4. By default, all work items that are still active in the system, as well as miscellaneous items, are copied to the new time sheet. If you want to include closed work items from the original time sheet in the new time sheet, select the **Include Closed Items** checkbox. Closed work items are:
   - Requests that are closed
   - Tasks that are complete and whose projects still allow time to be logged
   - Packages that are closed
5. Click **Copy.**

   The Edit Time Sheet page for the new time sheet is opened. The status of all the time sheet lines is Unsubmitted, regardless of the statuses of the corresponding time sheet lines on the time sheet that was copied.
6. On the Edit Time Sheet page, edit the time sheet as desired and click **Save.** For information about the time sheet fields, see *Understanding Time Sheets and Time Sheet Lines* on page 27.

Cancelling a Time Sheet

Time sheets cannot be deleted altogether, but you can cancel Unsubmitted time sheets in case you need to start them over. Cancelling a time sheet removes all the time logged against its work items. After you cancel a time sheet, you can create a new time sheet for the same time period even if your time sheet policy prohibits multiple time sheets for the same time period.

Only Unsubmitted time sheets can be cancelled.

Cancelled time sheets cannot be reinstated, but you can find them in a time sheet search by specifying **Time Sheet Status** of **Cancelled.**

To cancel a time sheet:

1. Search for and open the desired time sheet. See *Searching Time Sheets* on page 65.
2. On the Edit Time Sheet page, click **Cancel Time Sheet.**

   A Warning dialog box appears.
3. Click **Cancel Time Sheet** in the Warning dialog box.

   The time sheet is cancelled. The statuses of the time sheet and all of its lines are set to Cancelled.

Printing a Time Sheet

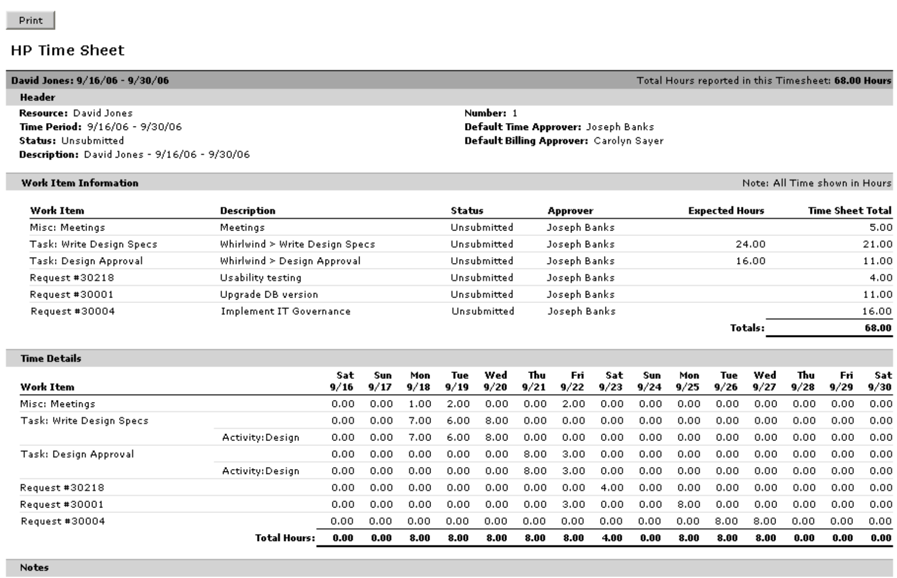
If you need to print a time sheet, you can use the **Printable Version** link to create a presentation that is more suitable for printing. When you click this link on a time sheet, the time sheet is displayed in grayscale in a standard page format that you can send directly to your printer without additional manipulation.

To print a time sheet:

1. Search for and open the desired time sheet. See *Searching Time Sheets* on page 65.

2. On the Edit Time Sheet page, click **Printable Version.**

   A printable version of the time sheet appears.



Print

HP Time Sheet

David Jones: 9/16/06 - 9/30/06 Total Hours reported in this Timesheet: **68.00 Hours**

Header

Resource: David Jones
Time Period: 9/16/06 - 9/30/06
Status: Unsubmitted
Description: David Jones - 9/16/06 - 9/30/06

Number: 1
Default Time Approver: Joseph Banks
Default Billing Approver: Carolyn Sayer

Work Item Information Note: All Time shown in Hours

Work Item	Description	Status	Approver	Expected Hours	Time Sheet Total
Misc: Meetings	Meetings	Unsubmitted	Joseph Banks		5.00
Task: Write Design Specs	Whirlwind > Write Design Specs	Unsubmitted	Joseph Banks	24.00	21.00
Task: Design Approval	Whirlwind > Design Approval	Unsubmitted	Joseph Banks	16.00	11.00
Request #30218	Usability testing	Unsubmitted	Joseph Banks		4.00
Request #30001	Upgrade DB version	Unsubmitted	Joseph Banks		11.00
Request #30004	Implement IT Governance	Unsubmitted	Joseph Banks		16.00
				Totals:	**68.00**

Time Details

Work Item		Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19	Wed 9/20	Thu 9/21	Fri 9/22	Sat 9/23	Sun 9/24	Mon 9/25	Tue 9/26	Wed 9/27	Thu 9/28	Fri 9/29	Sat 9/30
Misc: Meetings		0.00	0.00	1.00	2.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Task: Write Design Specs		0.00	0.00	7.00	6.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Activity:Design	0.00	0.00	7.00	6.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Task: Design Approval		0.00	0.00	0.00	0.00	0.00	8.00	3.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Activity:Design	0.00	0.00	0.00	0.00	0.00	8.00	3.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Request #30218		0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Request #30001		0.00	0.00	0.00	0.00	0.00	0.00	3.00	0.00	0.00	8.00	0.00	0.00	0.00	0.00	0.00
Request #30004		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.00	8.00	0.00	0.00	0.00
	Total Hours:	**0.00**	**0.00**	**8.00**	**8.00**	**8.00**	**8.00**	**8.00**	**4.00**	**0.00**	**8.00**	**8.00**	**8.00**	**0.00**	**0.00**	**0.00**

Notes

If the period type is set to **Monthly,** two **Time Details** sections appear in the printable time sheet, one for the first 15 days of the month and one for the remainder of the month.

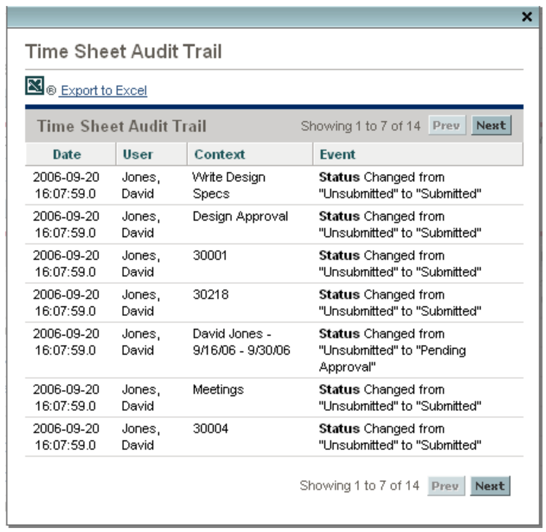
3. On this printable version, click **Print.**

   You computer's printer selection dialog opens. The printable version of the time sheet is sent to the printer you specify.

Viewing the Audit Trail

To view the Time Sheet Audit Trail window, click the **View Audit Trail** link at the top of a time sheet. The audit trail events are listed in reverse chronological order and can require more than one screen. See the example in *Figure 2-11* and *Figure 2-12*.

Figure 2-11. Time Sheet Audit Trail (first) window



Time Sheet Audit Trail

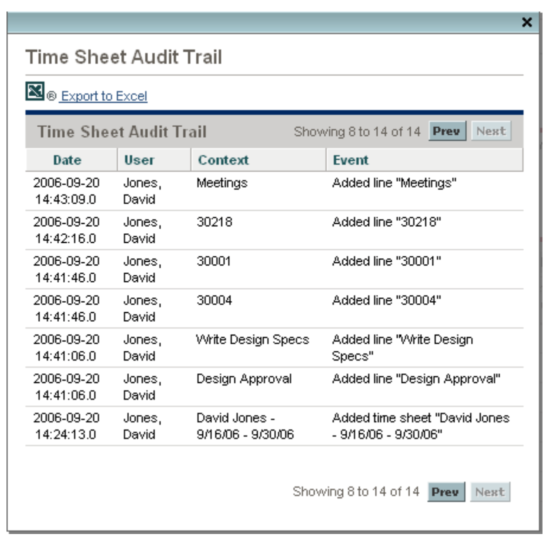
Export to Excel

Time Sheet Audit Trail — Showing 1 to 7 of 14 — Prev — Next

Date	User	Context	Event
2006-09-20 16:07:59.0	Jones, David	Write Design Specs	**Status** Changed from "Unsubmitted" to "Submitted"
2006-09-20 16:07:59.0	Jones, David	Design Approval	**Status** Changed from "Unsubmitted" to "Submitted"
2006-09-20 16:07:59.0	Jones, David	30001	**Status** Changed from "Unsubmitted" to "Submitted"
2006-09-20 16:07:59.0	Jones, David	30218	**Status** Changed from "Unsubmitted" to "Submitted"
2006-09-20 16:07:59.0	Jones, David	David Jones - 9/16/06 - 9/30/06	**Status** Changed from "Unsubmitted" to "Pending Approval"
2006-09-20 16:07:59.0	Jones, David	Meetings	**Status** Changed from "Unsubmitted" to "Submitted"
2006-09-20 16:07:59.0	Jones, David	30004	**Status** Changed from "Unsubmitted" to "Submitted"

Showing 1 to 7 of 14 — Prev — Next

Figure 2-12. Time Sheet Audit Trail (second) window



Time Sheet Audit Trail

Export to Excel

Time Sheet Audit Trail — Showing 8 to 14 of 14 — Prev — Next

Date	User	Context	Event
2006-09-20 14:43:09.0	Jones, David	Meetings	Added line "Meetings"
2006-09-20 14:42:16.0	Jones, David	30218	Added line "30218"
2006-09-20 14:41:46.0	Jones, David	30001	Added line "30001"
2006-09-20 14:41:46.0	Jones, David	30004	Added line "30004"
2006-09-20 14:41:06.0	Jones, David	Write Design Specs	Added line "Write Design Specs"
2006-09-20 14:41:06.0	Jones, David	Design Approval	Added line "Design Approval"
2006-09-20 14:24:13.0	Jones, David	David Jones - 9/16/06 - 9/30/06	Added time sheet "David Jones - 9/16/06 - 9/30/06"

Showing 8 to 14 of 14 — Prev — Next

The fields (columns) are described in *Table 2-7*.

Table 2-7. Time Sheet Audit Trail fields

Field Name	Description
Date	Date and time of the event.
User	User who initiated the event.
Context	Affected time sheet or time sheet line.
Event	Nature of the event in the audit trail.

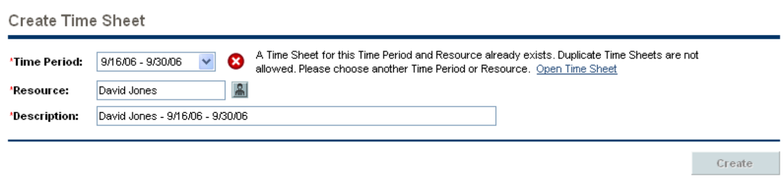
Time Sheet Policies

Time sheet policies are rules designed to control the creation and operation of your time sheets. Every resource who uses HP Time Management to log time against work items has a time sheet policy assigned by an administrator. The policy's rules control:

- Which reporting period type (weekly, bi-weekly, semi-monthly, or monthly) is used to log time
- Whether you log time in the form of hours each day, hours each time period, or percent of a time period
- Whether you are allowed to create multiple time sheets for the same time period
- Whether you are required to complete a time sheet for each time period
- Whether certain time sheet lines will be automatically approved
- Whether and when you receive email reminders to submit time sheets (before or after they are due, or both)
- Whether you receive email notification when an approver rejects time that you submitted
- The maximum hours allowed per day and the minimum and maximum hours allowed per time sheet, and consequences of violations
- The default set of charge codes you can assign to time sheet lines
- The work item types (requests, tasks, packages, miscellaneous items) for which you must specify activities on time sheets

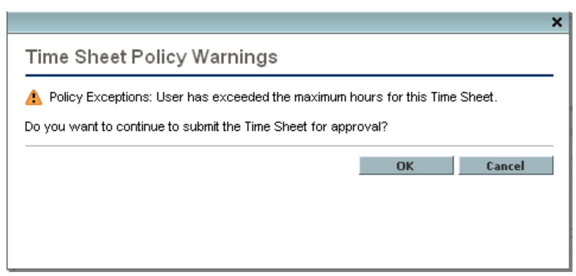
As you create, complete, and submit time sheets, HP Time Management warns you about any actions that potentially violate your time sheet policy. For example, if you are not allowed to submit more than one time sheet per time period, you might see a warning such as the one shown in *Figure 2-13* when creating a time sheet.

Figure 2-13. Create Time Sheet page that has a warning



As another example, if you do not adhere to the minimum or maximum hours for a time sheet, you might see a warning when submitting the time sheet. For example, the warning in *Figure 2-14* indicates that you have submitted a time sheet with too many hours, based on the time sheet policy assigned to you.

Figure 2-14. Time Sheet Policy Warnings



For details about specifying time sheet policies, see the *HP Time Management Configuration Guide.*

Using the My Tasks Portlet

If you typically work on tasks assigned to you in PPM Center projects, you probably have the My Tasks portlet on your PPM Dashboard. The My Tasks portlet is a convenient way for you to see your assigned tasks without having to search for them. You submit "actuals" for your assignment on these tasks directly in this portlet. If a task is part of a project that is integrated with HP Time Management, you can submit the time you worked on these tasks directly in the My Tasks portlet instead of on time sheets; that time is automatically added to a time sheet for the time period, and a new time sheet for that period is automatically created for you if none exists. In this manner, resources who work on projects and tasks might not need to create and complete time sheets or otherwise use the time sheet interface, at least not for projects and tasks.

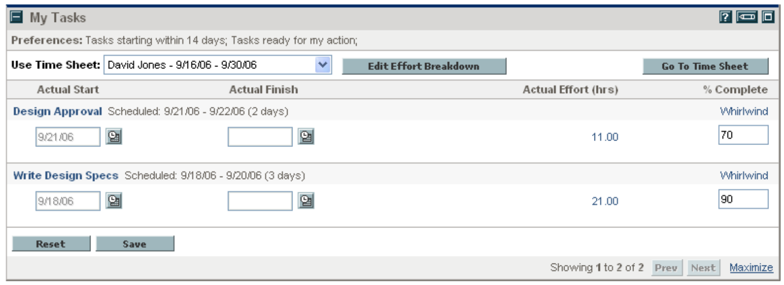
The My Tasks portlet displays projects and tasks that meet all of the following conditions:

- They are assigned to you.
- Their parent task is in Active status.
- Work is expected on them, that is, their status is Ready or In Progress. (In addition, if you deselect the portlet preference **Only show Tasks ready for my action,** the status could be Pending Predecessor.)
- They are scheduled to start and scheduled to finish within the number of days you optionally specify in the portlet preferences. (By default, their scheduled start date must be 14 days from the current date or earlier. No default preference is provided for their scheduled finish date.)

Depending on project configuration, the portlet can display both estimated and actual effort. If a task is part of a project that is integrated with HP Time Management, then the actual effort for the task is not directly editable on the portlet. However, you can click the number in the **Actual Effort (hrs)** column for the task to open a window where you can enter the breakdown of time spent on this task for the current time period. This is the same breakdown you would see in the time sheet interface.

See the example in *Figure 2-15*. For introductory information, see *Using the My Tasks Portlet and Project Integration* on page 20.

Figure 2-15. My Tasks portlet



If a project manager integrates HP Time Management and HP Project Management for a project, you have additional capabilities and considerations in reporting time, as described in the following section.

Integration of HP Time Management and HP Project Management

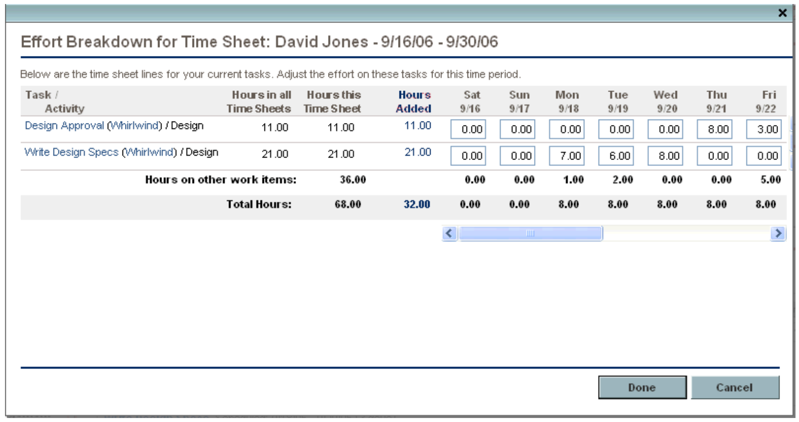
A project manager can integrate HP Time Management and HP Project Management on a project-by-project basis. If a project uses this integration capability, you must report details of the time you worked on that project, its tasks, or its summary tasks (depending on how time for the project is tracked) in HP Time Management time sheets or in the My Tasks portlet (see *Figure 2-15*). If you report time on time sheets, it is automatically reflected in the My Tasks portlet. Conversely, if you report time on the My Tasks portlet, that time is automatically reflected in corresponding time sheets.

More specifically, for integrated projects:

- Whenever you log time against a task (using either the time sheet interface or the My Tasks portlet), the time you enter is added to the Actual Effort value for your assignment on that task in HP Project Management. Because an integrated project can use HP Time Management to collect Actual Effort, the corresponding Actual Effort field on the task in the work plan interface cannot be independently edited; the data must come from HP Time Management.

- In the My Tasks portlet, you can click the **Edit Effort Breakdown** button or any particular task's value in the **Actual Effort (hrs)** column (see *Figure 2-15*) to display and update the Effort Breakdown window for the selected time sheet (see the example in *Figure 2-16*). This effort breakdown data for tasks in integrated projects is then automatically incorporated into the associated time sheet without separately accessing the time sheet from HP Time Management. Conversely, updates to the time sheet for tasks in integrated projects are automatically reflected in the effort breakdown accessed from the My Tasks portlet. (Tasks for projects that are not integrated with HP Time Management cannot be added to a time sheet and do not appear in the Effort Breakdown window.)

Figure 2-16. Effort Breakdown window



- Updates to your actuals data other than actual effort, such as **% Complete,** can be entered in either HP Time Management or HP Project Management, and are then automatically reflected in the other. In the time sheet, this data is entered on the **Project Fields** tab.

- If you have an HP Time Management license, you must enter actuals using time sheets or the My Tasks portlet, not the project's work plan. (If you do not have an HP Time Management license, you must enter your actual effort for tasks in the My Tasks portlet.)

Remember that the My Tasks portlet displays only tasks, whereas the time sheet allows entry of time for all work item types—requests, packages, projects or tasks, and miscellaneous items.

If you are a project manager and you want to integrate HP Time Management and HP Project Management for a project, see Chapter 6, *Integrating Time Management and Project Management,* on page 111.

3 Reviewing and Approving Time

In This Chapter:

Overview of Reviewing and Approving or Rejecting Time

For background information on time sheets, time sheet lines, and their statuses, see *Overview of Reporting Your Time* on page 22.

When a time sheet is submitted, time approvers must review and approve its lines. One time sheet can have different approvers for different lines.

When all the lines on a time sheet become approved, the time sheet status is Approved and the time sheet is available for post-approval processing (freezing and closing). If any lines are rejected, the resource who entered the time must rework those lines and resubmit them.

This chapter details the procedures that managers and designated approvers use to approve time. Approvers can take the following actions for time sheet lines they are authorized to approve or reject:

- Review time sheet lines on submitted time sheets. Reviewing a time sheet line leaves its status as Submitted.
- Approve submitted time sheet lines so that they can be frozen and closed. Approved time sheet lines have a status of Approved.
- Reject submitted time sheet lines so that they can be returned to their resources for edits or other types of rework. Rejected time sheet lines have a status of Rejected.

➤ Administrators with the appropriate access grants can configure time sheet policies that allow time to be approved automatically when it is submitted. For more information, see the *HP Time Management Configuration Guide.*

Determining Time Approvers

HP Time Management determines (derives) the approvers of the time sheet lines on a time sheet whenever the time sheet is saved or submitted.

Only people who are identified as time approvers (or their delegates) and who have the Time Mgmt: Approve Time Sheets access grant can approve a time sheet line representing a work item. Default time approvers can be configured for individual resources (users), as described in the *HP Time Management Configuration Guide.* In fact, time approvers are determined several ways, depending on the work item type, and they are derived according to priorities described in the *HP Time Management Configuration Guide* in connection with configuring resources.

For information about viewing all approvers and the transaction history for a time sheet, see *Time Sheet Approvals and Transaction Details* on page 62.

Delegation

HP Time Management has the concept of delegation, where one person, the delegator, temporarily assigns his or her duties and responsibilities to another person, the delegate. Typically, people in management positions delegate review and approval authority for their time sheets to others, with specific start and end dates (for example, to cover upcoming vacations).

If a delegate has the correct licenses and access grants, which are not inherited from the delegator, the delegate can, on behalf of the delegator:

- Create, edit and submit time sheets
- Approve and reject submitted time
- Freeze and close time sheets

A manager has implicit delegations, such as the ability to edit the time sheets of his or her direct reports, if the manager has the Time Mgmt: Edit Time Sheets access grant.

Resources for whom a delegate logs time must have licenses for HP Time Management.

When you search time sheets, HP Time Management presents the time sheets that meet your filter criteria and for which you are the delegate of a resource, as well as other time sheets as described in *Searching Time Sheets* on page 65.

For more information about delegation, see the *HP Time Management Configuration Guide.*

Approving or Rejecting Time

As described in the following sections, you can approve or reject time, using these interfaces:

- The Approve Time page (see *Approving or Rejecting Time Using the Approve Time Page*).
- The Approve Time Sheets portlet (see *Approving or Rejecting Time Using the Approve Time Sheets Portlet* on page 87).
- The **Project Summary** tab in a project's Project Overview page (see *Approving or Rejecting Time from the Project Overview Page* on page 89). This tab displays only the time sheets that include tasks from that project.

Using any of these interfaces:

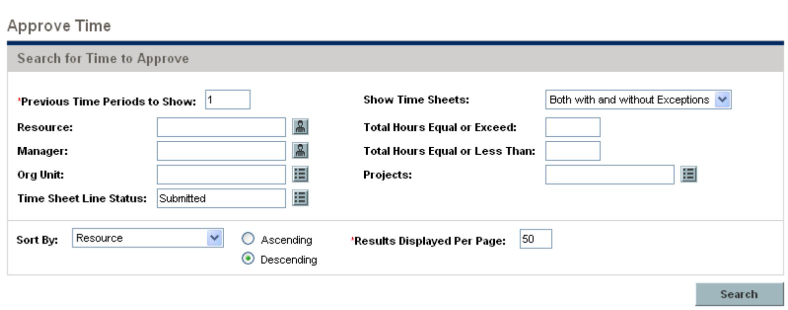
- You initially see a list of the time sheets that have at least one line you are authorized to approve.
- If you approve (or reject) a time sheet in the list without opening it, you are actually approving (or rejecting) only the time sheet's particular lines that you are authorized to approve.
- If you open a time sheet in the list:
  - You can approve or reject only the particular lines you are authorized to approve, and those lines move to Approved or Rejected status accordingly.
  - Lines you are not authorized to approve are shown, but you have no way to approve or reject them or otherwise change their statuses. They are to be reviewed by other approvers.

Approving or Rejecting Time Using the Approve Time Page

To approve time, you first search for time you can approve. To use the Approve Time page to approve time:

1. Log on to PPM Center.
2. From the menu bar, select
   Time Management > Time Sheets > Approve Time.

   The Approve Time page appears.



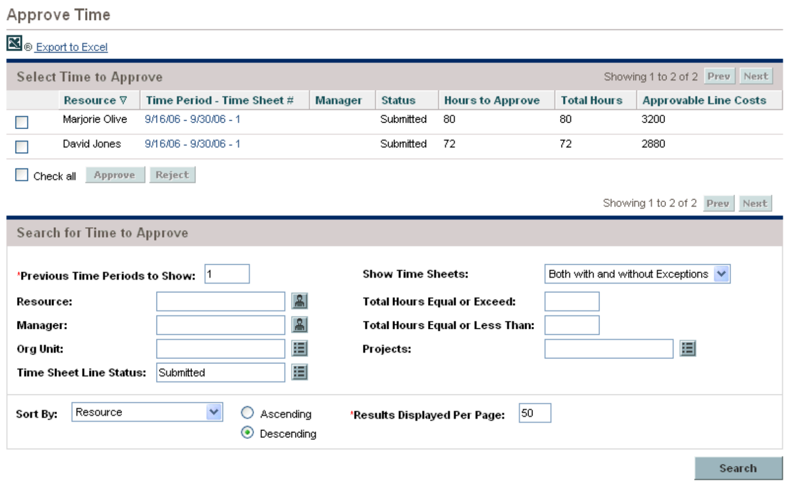
3. On the Approve Time page, enter search and sort criteria in the **Search for Time to Approve** section as specified in the following table.

Field Name (*Required)	Description
Search criteria	
*Previous Time Periods to Show	Applies your search criteria to include time from the number of previous time periods you specify (as well as from the current time period).
Resource	Limits the search to time sheets for the selected resources.
Manager	Limits the search to time sheets for the direct reports of the selected managers.
Org Unit	Limits the search to time sheets for resources in the selected Org Units.
Time Sheet Line Status	Limits the search to time sheets having lines with the statuses you specify. The possible time sheet line statuses are: ■ **Submitted** (the default) ■ **Unsubmitted** ■ **Approved** ■ **Rejected** ■ **Cancelled** ■ **Frozen** ■ **Closed** For more information, see *Summary of Time Sheet Line Statuses and Time Sheet Statuses* on page 64.
Show Time Sheets	Limits the search to time sheets with exceptions or without exceptions, or allows both. An exception is a violation of one of the time sheet policies that specifies allowed maximum hours per day or minimum or maximum hours per time sheet.
Total Hours Equal or Exceed	Limits the search to time sheets on which the total hours equal or exceed the number you specify.
Total Hours Equal or Less Than	Limits the search to time sheets on which the total hours are equal to or less than the number you specify.
Projects	Limits the search to time associated with the projects you specify.

Field Name (*Required)	Description
Sort criteria	
Sort By	The parameter (column in the search results) to use to sort the search results. The options are: ■ **Resource.** ■ **Time Period - Time Sheet #.** Links to the time sheets having the time period and time sheet number (a unique combination). ■ **Manager.** The manager of the **Resource.** ■ **Status.** The **Time Sheet Line Status** as specified in the search criteria. ■ **Hours to Approve.** For this time sheet, the number of hours of this **Status** that you can approve. ■ **Total Hours.** The total number of hours on this time sheet, regardless of the search criteria or who their approvers are. ■ **Approvable Line Costs.** The costs associated with the **Hours to Approve.**
Ascending *or* Descending	Displays the results in ascending or descending order.
*Results Displayed Per Page	Sets the maximum number of results to be displayed per page.

4. Click **Search.**

   The Approve Time page is refreshed, with the search results shown in the **Select Time to Approve** section added at the top of the page.



   The list of search results includes all the time sheets for which you can approve one or more time sheet lines.

   The column headings match the **Sort By** options. (The **Status** column shows the time sheet line status.)

   To see cost data in the **Approvable Line Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant.

5. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject particular time sheet lines, see step 6.

   To approve or reject all the submitted time in one or more time sheets:

   a. Select checkboxes in the left column for the time sheets of interest (or select **Check all**).

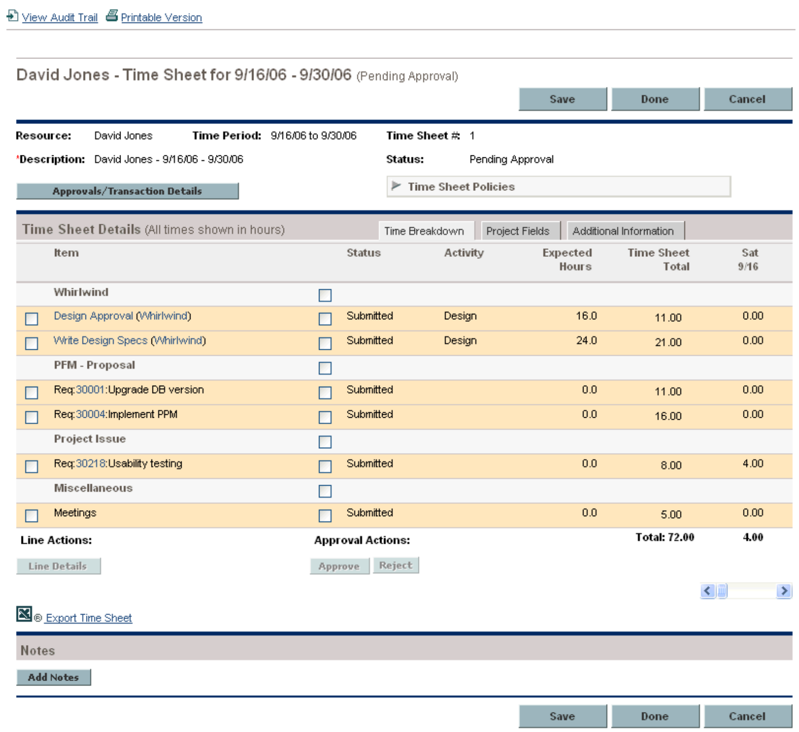
   b. Click **Approve** or **Reject.**

      The Approve Time page is refreshed. The status of the time sheet lines in the time sheets you approve or reject becomes Approved or Rejected accordingly.

6. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject all the submitted time in one or more time sheets, see step 5.

To approve or reject particular time sheet lines:

a. Open the time sheet by clicking its link in the **Time Period - Time Sheet - #** column in the **Select Time to Approve** section.

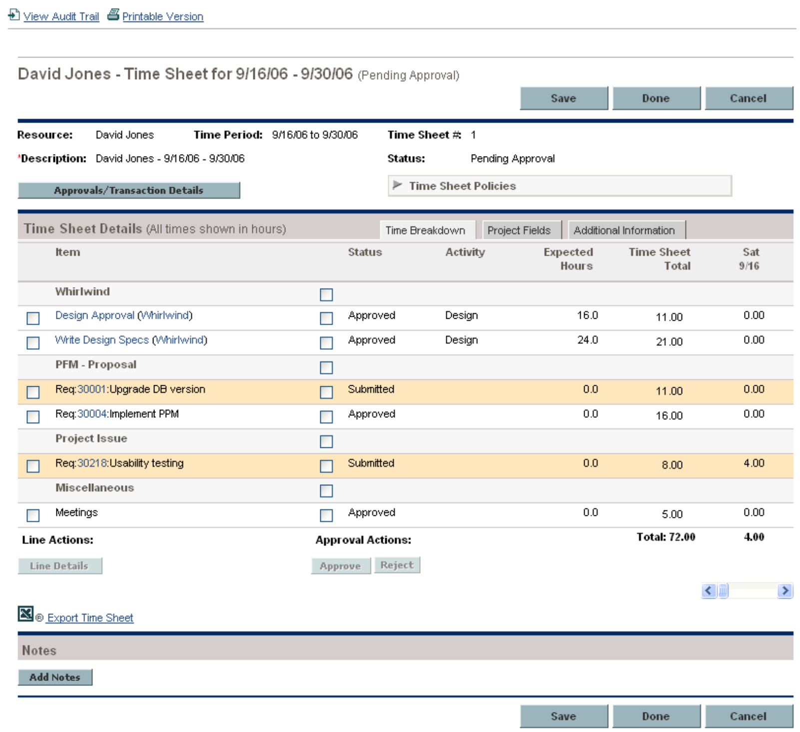


b. For particular time sheet lines in the time sheet, select the desired checkboxes to the immediate left of the time sheet's **Status** column.

c. Click **Approve** or **Reject.**

The status of the time sheet lines you approve or reject becomes Approved or Rejected accordingly.

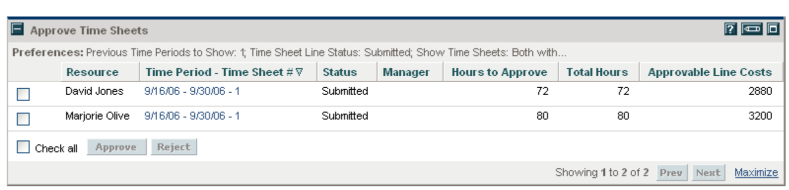
If all the time sheet lines on a time sheet (including those that have other approvers) have now become Approved, the time sheet status becomes Approved.



Approving or Rejecting Time Using the Approve Time Sheets Portlet

The Approve Time Sheets portlet can be configured to allow approvers to review, then approve or reject submitted time. See *Figure 3-1* (click the **Maximize** link to display any more time sheets not shown in this view and to display the **Export to Excel** link). This portlet functions the same way as the Approve Time page (see *Approving or Rejecting Time Using the Approve Time Page* on page 82).

Figure 3-1. Approve Time Sheets portlet



➤ To see cost data in the **Approvable Line Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant.

To use this portlet to approve or reject time sheet lines from time sheets:

1. Log on to PPM Center.
2. If necessary, personalize your PPM Dashboard to include the Approve Time Sheets portlet.

3. To specify filter criteria for the list of time sheets to approve, click the portlet's **Edit** icon and edit the preferences as you would for any portlet. The portlet filter criteria are the same as on the Approve Time page (see step 3 on page 83), with the addition of an option to display on the portlet a summary of the portlet preferences you specified.

   The portlet includes all the time sheets for which you can approve one or more time sheet lines.

4. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject particular time sheet lines, see step 5.

   To approve or reject all the submitted time in one or more time sheets:

   a. Select the time sheet checkboxes in the left column (or select **Check all**).

   b. Click **Approve** or **Reject.**

      The Approve Time Sheets portlet is refreshed. The status of the time sheet lines in the time sheets you approve or reject becomes Approved or Rejected accordingly.

5. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject all the submitted time in one or more time sheets, see step 4.

   To approve or reject particular time sheet lines:

   a. Open the time sheet by clicking its link in the **Time Period - Time Sheet - #** column.

      You can review details for or add notes to any particular time sheet line. See *Viewing and Specifying Time Sheet Line Details (Work Item Details)* on page 57.

   b. For particular time sheet lines in the time sheet, select the checkboxes to the immediate left of the time sheet's **Status** column.

   c. Click **Approve** or **Reject.**

      The status of the time sheet lines you approve or reject becomes Approved or Rejected accordingly.

      If all the time sheet lines on a time sheet (including those that have other approvers) have now become Approved, the time sheet status becomes Approved.

Approving or Rejecting Time from the Project Overview Page

In the Project Overview page, a project manager can see a list of the submitted time sheets that have at least one task in that project he is authorized to approve.

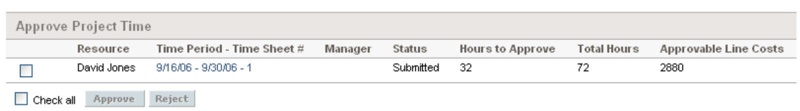
To use the Project Overview page to approve or reject time logged against a particular project:

1. From the menu bar, select
   Project Management > Projects & Tasks > Search Projects.

2. Select and open the project of interest.

   The Project Overview page opens to the **Project Summary** tab.

3. If present, the **Approve Project Time** section at the bottom of the **Project Summary** tab lists the time sheets for the project that have time submitted for you to approve.

> To see cost data in the **Approvable Line Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant.

4. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject particular time sheet lines, see step 5.

   To approve or reject all the submitted time in one or more time sheets:

   a. Select checkboxes in the left column for the time sheets of interest (or select **Check all**).

   b. Click **Approve** or **Reject.**

      The Project Overview page is refreshed. The status of the time sheet lines in the time sheets you approve or reject becomes Approved or Rejected accordingly.

5. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject all the submitted time in one or more time sheets, see step 4.

   To approve or reject particular time sheet lines:

   a. Open the time sheet by clicking its link in the **Time Period - Time Sheet - #** column in the **Project Time** section.

      On the time sheet, you might see for your approval time sheet lines for request, package, or miscellaneous work item types in addition to time sheet lines for projects or tasks.

   b. For particular time sheet lines in the time sheet, select the checkboxes to the immediate left of the time sheet's **Status** column.

   c. Click **Approve** or **Reject.**

      The status of the time sheet lines you approve or reject becomes Approved or Rejected accordingly.

      If all the time sheet lines on a time sheet (including those that have other approvers) have now become Approved, the time sheet status becomes Approved.

Finding Delinquent (Overdue) Time Sheets

A time sheet becomes delinquent (overdue) when all of the following are true:

- The time sheet policy for the associated resource requires him to submit a time sheet for each time period. (For information about time sheet policies, see *Time Sheet Policies* on page 74 and the *HP Time Management Configuration Guide.*)
- Today's date is after the end date of the time sheet's time period.
- The associated resource has not created the time sheet (it will be reported as Missing), has created but not submitted it (its status is Unsubmitted), or needs to rework and resubmit it (its status is In Rework).

You can use the Delinquent Time Sheets report to view summary information for all delinquent time sheets in the system, or for a subset by using filter criteria you specify, if you have the Time Mgmt: View All Time Sheets (Summary Info Only) access grant.

To generate the Delinquent Time Sheets report:

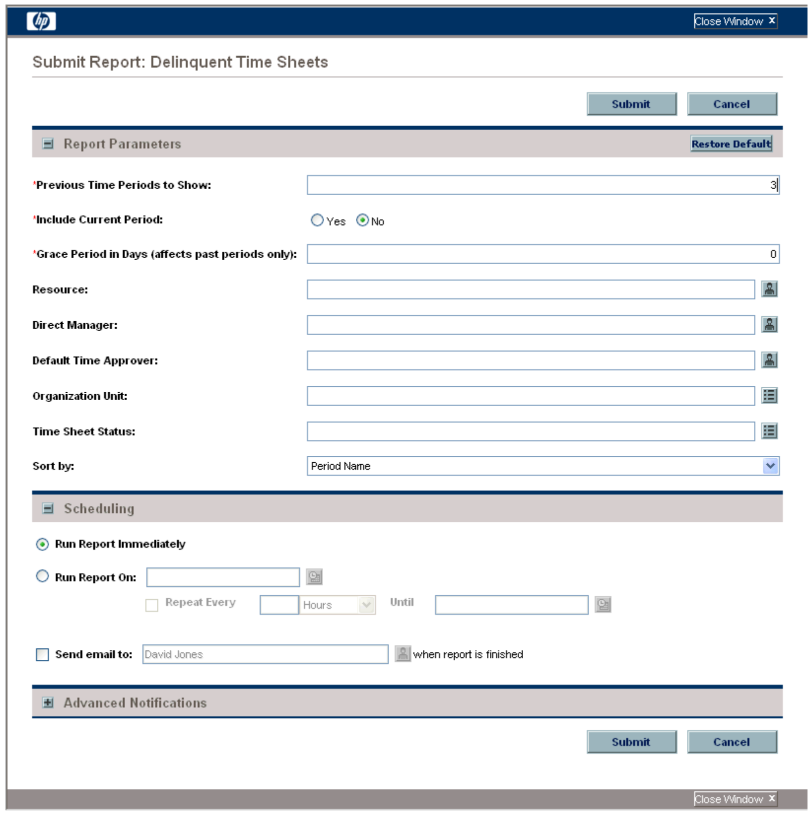
1. Log on to PPM Center.
2. From the menu bar, select **Reports > Create a Report.**

   The Submit New Report page opens.

3. From the **Report Category** option, select **Time Management.**

4. Click **Delinquent Time Sheets.**

   The Submit Report: Delinquent Time Sheets page opens.



5. Specify filter criteria as described in the following table:

Field Name (*Required)	Description
*Previous Time Periods to Show	Applies your other search criteria to include time sheets from the number of previous time periods you specify.
*Include Current Period	Applies your other search criteria to include time sheets from the current time period. When you specify this option, consider how close today's date is to the end of the current time period.
*Grace Period in Days (affects past periods only)	The number of days after the end of a time period to allow until a time sheet is listed in the report.
Resource	Limits the search to delinquent time sheets for the resources you specify.

Field Name (*Required)	Description
Direct Manager	Limits the search to delinquent time sheets for the direct reports of the manager you specify.
Default Time Approver	Limits the search to delinquent time sheets for the resources who have the default time approver you specify.
Organization Unit	Limits the search to delinquent time sheets for resources in the Organization Unit you specify.
Time Sheet Status	Limits the search to delinquent time sheets with the statuses you specify: ■ **In Rework** ■ **Missing** (that is, not created) ■ **Unsubmitted** If not specified, delinquent time sheets that have any of these statuses and that meet other filter criteria are included.
Sort by	Sort the results by **Period Name** or **Resource.**

➤ For information about scheduling and notifications options, see the *Reports Guide and Reference.*

6. Click **Submit.**

   The Delinquent Time Sheets report runs.

7. Review the list of delinquent time sheets in the report.

   If a delinquent time sheet has not even been created, its status is shown as **Missing.** (If a delinquent time sheet was created but later cancelled, it is considered **Missing,** as though it had never been created.)

8. As needed, open any time sheet that is not **Missing** by clicking its link in the **Period - Time Sheet #** column.

4 Freezing and Closing Time Sheets

In This Chapter:

- *Overview of Freezing and Closing Time Sheets*
- *Freezing and Closing Time Sheets*

Overview of Freezing and Closing Time Sheets

After a time sheet is approved, the associated labor cost is typically scrutinized and then billed to the customer for whom the work was done. HP Time Management does not explicitly perform this billing function, but it does keep track of charge codes associated with work items on time sheets.

A charge code represents an internal or external customer who is billed for the cost of a work item. In some organizations, actual time is used as information for charge-backs or billings. After a work item is entered, actual time is logged against the work item. This generates a cost that is billed to the internal or external customer.

In some cases, override rules are used to set charge codes. For example, all time work on a specific project or task can be assigned to a particular charge code.

For more information about charge codes and override rules, see the *HP Time Management Configuration Guide.*

To facilitate the billing process, HP Time Management supports the configuration of "billing approvers." The billing approver's role is to scrutinize the costs associated with the time that was approved by the time approvers, and then optionally "freeze" time sheets whose costs have been accounted for. When a billing approver freezes a time sheet, its status becomes Frozen an no subsequent changes can be made to the time sheet.

After a time sheet has been frozen and data extraction or other external activity has been performed (or if the option to freeze the time sheet is not used), the final step in the HP Time Management process is for the billing approver to close the time sheet. The time sheet status is updated to Closed, and final reports can be generated. Only approved or frozen time sheets can be closed.

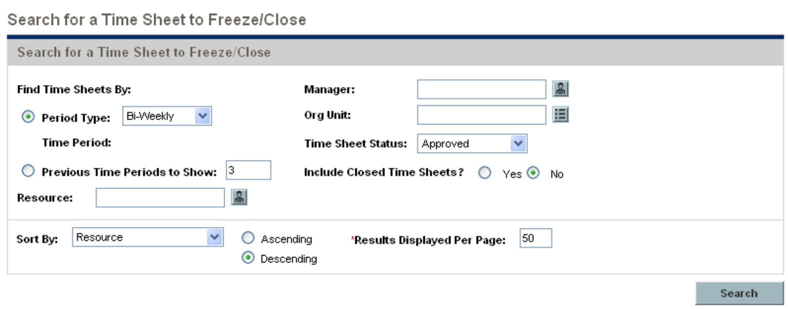
This chapter details the procedures associated with the freezing and closing of time sheets by their designated billing approvers.

Freezing and Closing Time Sheets

To freeze or close a time sheet:

1. Log on to PPM Center.
2. From the menu bar, select **Time Management > Time Sheets > Freeze/Close Time Sheets.**

   The Search for a Time Sheet to Freeze/Close page appears.



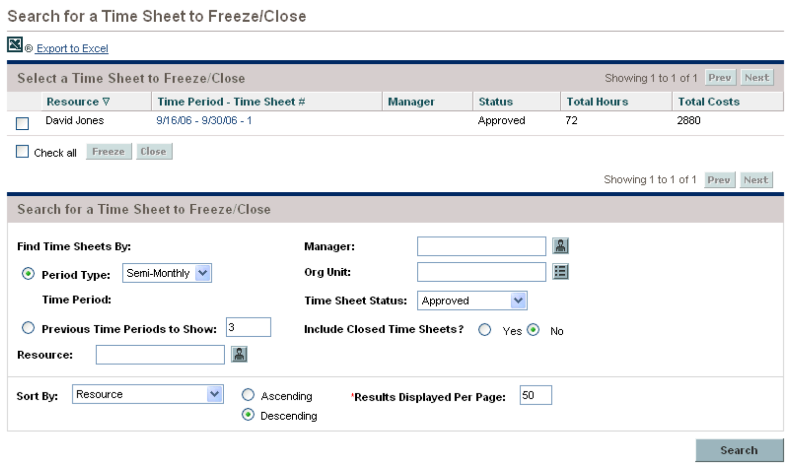
3. Enter search and sort criteria as specified in the following table.

Field Name (*Required)	Description
Search criteria	
Period Type (option includes a drop-down list)	When selected, limits the search to time sheets having the type of time period selected from the drop-down list. Depending on your system's configuration, the list can include the following: ■ **Weekly** (every week, starting by default on a Monday) ■ **Bi-Weekly** (every two weeks, starting by default on a Monday; for example, **3/12/07 - 3/25/07** and **3/26/07 - 4/8/07** are successive bi-weekly time periods in March and April 2007) ■ **Semi-Monthly** (twice a month, where the first time period always ends on the 15th of the month; for example, the two semi-monthly time periods of March 2007 are **3/1/07 - 3/15/07** and **3/16/07 - 3/31/07**) ■ **Monthly** (every full calendar month)
Time Period	Enabled when **Period Type** is selected and a value is chosen for it. Optionally select a particular time period from the drop-down list.

Field Name (*Required)	Description
Previous Time Periods to Show (option includes a numeric field)	When selected and specified, applies your search criteria to include time sheets for the number of previous time periods you specify (as well as for the current time period).
Resource	Limits the search to time sheets for the selected resources.
Manager	Limits the search to time sheets for the direct reports of the selected managers.
Org Unit	Limits the search to time sheets for the selected Org Units.
Time Sheet Status	Limits the search to time sheets that have the selected status. To freeze or close a time sheet, its status must be Approved.
Include Closed Time Sheets	Whether or not to include closed time sheets in the search.
Sort criteria	
Sort By	The parameter (column in the search results) to use to sort the search results. The options are: ■ **Resource.** As limited by the search criteria, the resources whose time sheets can be frozen or closed. ■ **Time Period - Time Sheet #.** Links to the time sheets having the time period and time sheet number (a unique combination). ■ **Manager.** The manager of the **Resource.** ■ **Status.** The **Time Sheet Status** as specified in the search criteria. ■ **Total Hours.** The total number of hours on this time sheet, regardless of the search criteria or who their approvers are. ■ **Total Costs.** The costs associated with the **Total Hours.**
Ascending *or* Descending	Displays the results in ascending or descending order.
*Results Displayed per Page	Sets the maximum number of results to be displayed per page.

4. Click **Search.**

   The Search for a Time Sheet to Freeze/Close page is refreshed, with the search results shown in the **Select a Time Sheet to Freeze/Close** section added at the top of the page. The column headings match the **Sort By** options.



To see cost data in the **Total Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant.

5. Select the checkboxes for the time sheets of interest. (Select **Check all** to select all the time sheets.)

6. Freeze or close the time sheets:

   - To freeze the time sheets, click **Freeze.**

     The status of the selected time sheets and all their time sheet lines becomes Frozen and the Search for a Time Sheet to Freeze/Close page is refreshed.

   - To close the time sheets, click **Close.**

     The status of the selected time sheets and all their time sheet lines becomes Closed and the Search for a Time Sheet to Freeze/Close page is refreshed.

5 Creating Work Allocations for Users

In This Chapter:

Overview of Creating Work Allocations for Users

Work allocations in HP Time Management enable managers to allocate (or "budget") the time they intend to be spent on individual work items (see *Using Work Items in Time Sheets and Work Allocations* on page 19).

Managers might want to allocate a certain amount of time for miscellaneous work items such as meetings, or they may anticipate that a specific work item (such as a request or package) is expected to take a certain amount of time. These allocations are then displayed to the resource entering time on a time sheet so that the resource can see what is expected. Managers can later compare the actual time entered by resources to the initial allocation, and this may influence their time approval decisions.

Managers can also use work allocations to restrict which resources can log time against a particular work item.

Work allocations do not apply to project or task work items. The expected effort for a task is determined by the scheduled effort of that task, and any work allocations created for that task are ignored.

Creating work allocations is optional.

This chapter details the following procedures associated with creating and managing work allocations:

- Creating work allocations.
- Saving work allocations to work on at a later date.
- Closing work allocations.
- Deleting work allocations. Work allocations that have time logged against them cannot be deleted.

Creating Work Allocations

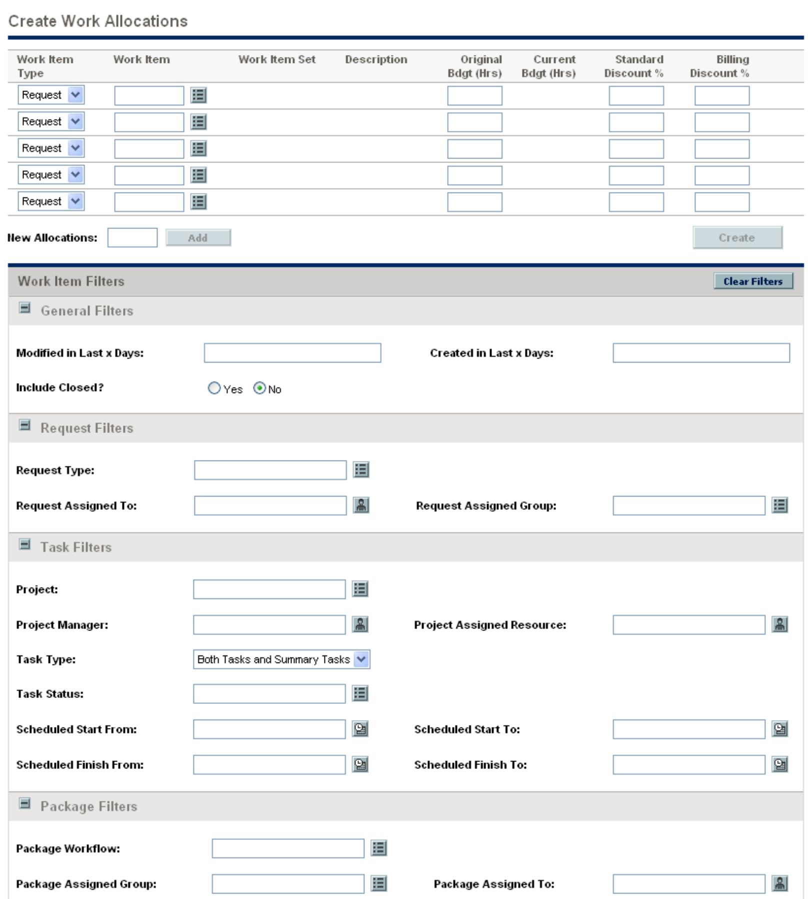
Work allocations are created for specific work items. Before creating a work allocation, the work item must exist.

To create work allocations, you must have the Time Mgmt: Edit Work Allocations access grant.

To create a new work allocation:

1. Log on to PPM Center.
2. From the menu bar, select **Time Management > Allocations > Create Allocations.**

   The Create Work Allocations page appears.



The available **Work Item Types** can include:

- **Request**
- **Package**
- **Task**
- **Misc** (miscellaneous)

Remember that the scheduled effort for a task supersedes any work allocation created for that task.

3. (Optional) Use the **Work Item Filters** section of the Create Work Allocations page to limit the collection of work items available in the auto-complete lists associated with the work item types in the rows at the top of the page. Later, you will select the particular work items of interest from those auto-complete lists.

   Filters in the **General Filters** section apply to *all* work item types, and filters in the other sections apply to particular work item types.

   For example, if you specify filter criteria in the **General Filters** and the **Request Filters** subsections of the **Work Item Filters** section, the set of work items in the auto-complete list for Request work items becomes automatically limited to those that meet both of your sets of criteria, and the sets of work items in the other auto-complete lists become automatically limited by your **General Filters** criteria.

   Complete the **Work Item Filters** section as desired, using the information in the following table.

Field Name	Description
General Filters section	
Modified in Last x days	Limits the list of work items to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of work items to those that were created within the number of days you specify.
Include Closed	Indicates whether closed work items are to be included in the list of work items. Closed work items are: ■ Requests that are closed ■ Tasks that are complete and whose projects still allow time to be logged ■ Packages that are closed

Field Name	Description
Request Filters section	
Request Type	Limits the list of requests to those with the set of request types you specify.
Request Assigned To	Limits the list of requests to those assigned to the user you specify.
Request Assigned Group	Limits the list of requests to those with the Request Assigned Group you specify from a list of security groups.
Task Filters section	
Project	Limits the list of tasks to those in the project you specify.
Project Manager	Limits the list of tasks to those in projects that have the project manager you specify.
Project Assigned Resource	Limits the list of tasks to those with the assigned resource you specify.
Task Type	Limits the list to only projects, only tasks, only summary tasks, or both tasks and summary tasks.
Task Status	Limits the list to tasks of a particular status.
Scheduled Start From	Limits the list of tasks to those that start on the date you specify or later.
Scheduled Start To	Limits the list of tasks to those that start on the date you specify or earlier.
Scheduled Finish From	Limits the list of tasks to those that finish on the date you specify or later.
Scheduled Finish To	Limits the list of tasks to those that finish on the date you specify or earlier.
Package Filters section	
Package Workflow	Limits the list of packages to those with the workflow you specify.
Package Assigned Group	Limits the list of packages to those with the Package Assigned Group you specify from a list of security groups.
Package Assigned To	Limits the list of packages to those assigned to the user you specify.

For information about how to modify the set of HP Time Management filters, see the *HP Time Management Configuration Guide.*

4. When you finish specifying the filters that limit the auto-complete lists of work items for the work item types, complete the fields in the work allocations list at the top of the Create Work Allocations page as specified in the following table.

Field Name	Description
Work Item Type	The list of work items depends on the selection in the **Work Item Type** field. The work item types (in bold below) and descriptions of their work items are: ▪ **Request.** A list of open requests in HP Demand Management, identified by the request numbers. ▪ **Package.** A list of open packages in HP Deployment Management, identified by the package numbers. ▪ **Task.** A list of projects or tasks in HP Project Management, identified by name. ▪ **Misc.** A list of miscellaneous work items, such as **Vacation** or **Meeting.**
Work Item	The name or number of the work item, based on the work item type. ▪ For requests, a request number. ▪ For packages, a package number. ▪ For tasks, a task name. ▪ For miscellaneous, a selection from HP Time Management, such as **Vacation** or **Meeting.**
Work Item Set	The work item set of the work items selected: ▪ For request work items, the specific request type. ▪ For package work items, the workflow used by the package. ▪ For task work items, the project.
Description	The value in the **Description** field for the given work item, truncated to 50 characters.
Original Bdgt (Hrs)	While you are completing the fields on the Create Work Allocations page, the original amount of time (in whole hours or tenths of an hour) to allocate (to budget) for the work item. Once you have created the work allocation: ▪ This value is assigned to the **Current Bdgt (Hrs)** field, which you can later edit. ▪ The **Original Bdgt (Hrs)** field becomes a read-only field that automatically and permanently retains its initial value, which is an important metric for tracking accuracy of planning and estimation.

Field Name	Description
Current Bdgt (Hrs)	Blank until a work allocation is created. For a created work allocation, the editable amount of time (in whole hours or tenths of an hour) to allocate (to budget) for the work item.
Standard Discount %	If HP Time Management is used to gather charge-back information, the cost rate for the resources might be different than the standard rate. For this case, you can specify a pre-negotiated discount rate. Normally this field is either 0% (standard cost rate or no billing is performed) or 100% (no charge for this work item). This rate can be used for custom calculations when extracting data to a billing or financial system.
Billing Discount %	Cost overruns sometimes require charges to be renegotiated. This field sets a pre-billing discount rate for all work performed for the work item. For example, if the costs of a given project went over by 20%, an additional billing discount of 10% might be set. This rate can be used for custom calculations when extracting data to a billing or financial system.

5. Click **Create.**

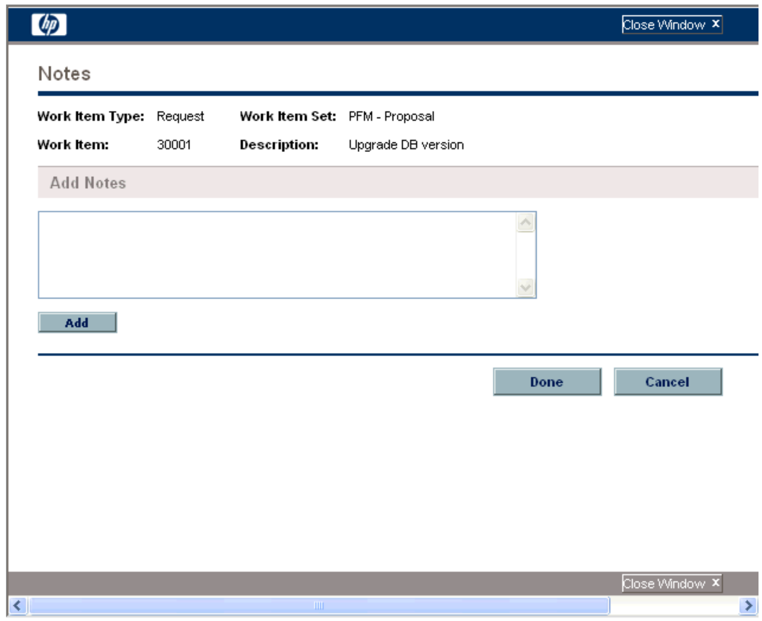
   The work allocation is created and the Created Work Allocations page appears.

   The **Details** column is added on the right. Its three icons, from left to right, are for:

   - **Notes**
   - **Resource Access**
   - **Charge Codes**

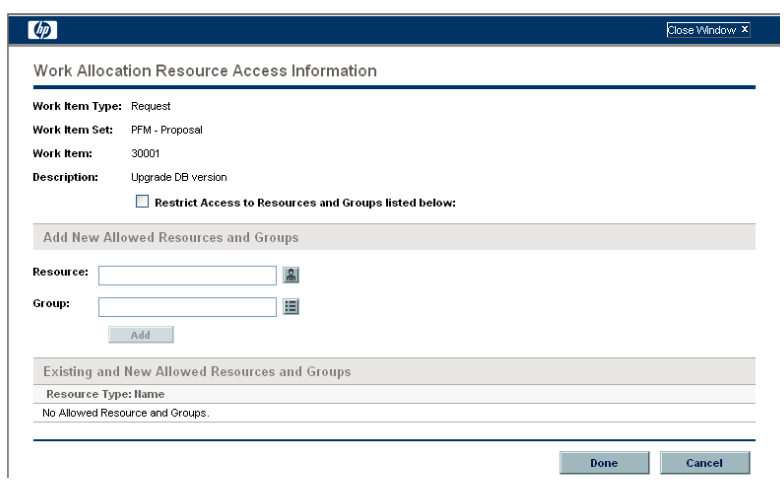
6. In the **Details** column, click the **Notes** icon to open the Work Allocation Notes page.



   a. Enter information in the text area and click **Add** for each new note.

   b. Click **Done** to save all of the notes.

7. In the **Details** column, click the **Resource Access** icon to display the Work Allocation Resource Access Information page. Use this page to assign specific resources to a work allocation. Other users are restricted from using the associated work items.



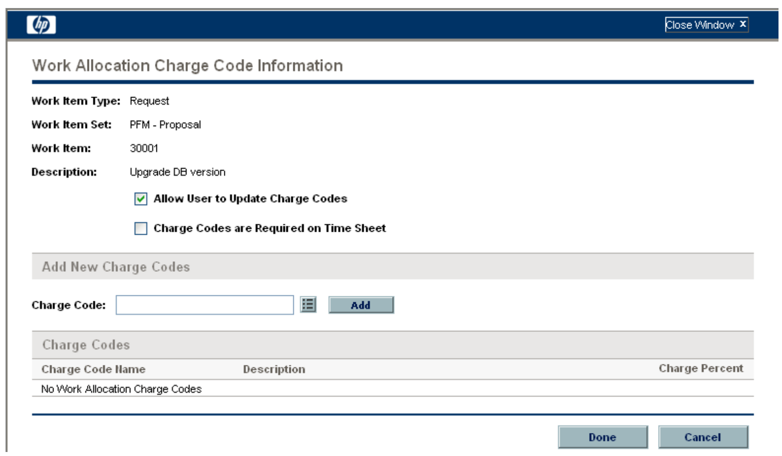
a. In the Work Allocation Resource Access Information page, select the **Restrict Access to Resources and Groups listed below** checkbox.

b. Select resources from the **Resource** list and click **Add.**

c. Select resource groups from the **Group** list and click **Add.**

d. Click **Done** to save the selections.

8. In the **Details** column, click the **Charge Codes** icon to display the Work Allocation Charge Code Information page. Use this page to specify the charge codes to use for time billed against a work item. This page also sets the percentage breakdown to use to distribute the total calculated cost among the various charge codes. Charge codes are applied when a work item is added to a time sheet. To assign charge codes, you must be in a security group that allows access to all charge codes or to the specific charge codes.



a. In the Work Allocation Charge Code Information page, use the first checkbox to indicate whether users are allowed to update the set of charge codes.

b. Use the second checkbox to indicate whether charge codes for this work allocation must be entered on time sheets.

c. To add a charge code, select the code from the **Charge Code** list and click **Add.**

d. This adds the charge code to the list in the **Charge Codes** section.

e. Within this section, specify the **Charge Percent** field for each code. You can specify percentages to a tenth of a percent. The values must total 100%.

f. Click **Done** to save the selections.

9. To save this work allocation without creating more work allocations, on the Created Work Allocations page, click **Done.**

   To add more work allocations, click **Create Allocations** and continue with step 10.

10. Repeat step 3 on page 102 through step 9 on page 108 to create more work allocations. If the number of blank rows is insufficient, enter the number of additional rows required in the **New Allocations** field and click **Add.** This adds the specified number of rows to the section.

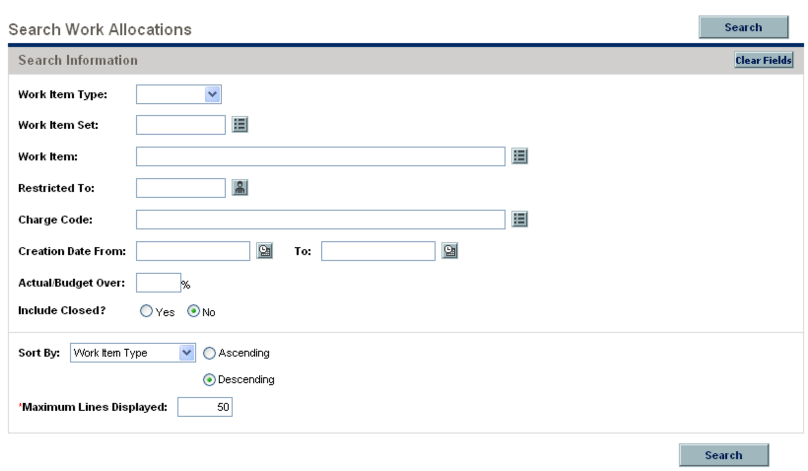
Editing, Closing, and Deleting Existing Work Allocations

You can edit, close, and delete work allocations, as follows:

➤ To close or delete work allocations you did not create, you must have the Time Mgmt: Edit All Work Allocations access grant.

1. Log on to PPM Center.
2. From the menu bar, select **Time Management > Allocations > Search Allocations.**

   The Search Work Allocations page appears.

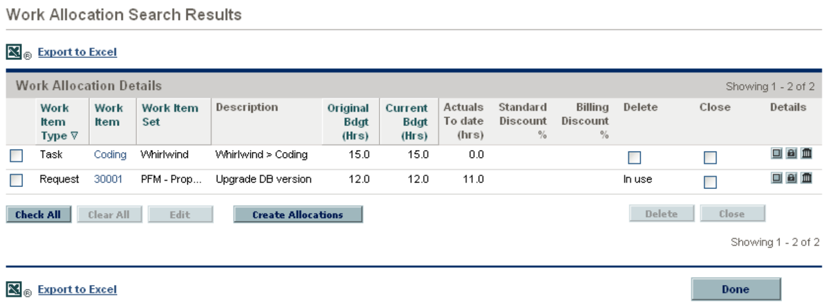


3. In the Search Work Allocations page, enter search and sort criteria as desired and as specified in the following table.

Field Name (*Required)	Description
Search criteria	
Work Item Type	Limits the search to work allocations for a single type of work item (requests, packages, tasks, or miscellaneous).
Work Item Set	Limits the search to work allocations for a specific request type, a specific project, or a specific package workflow.
Work Item	Limits the search to work allocations for a specific work item. This will return a single work allocation at most.
Restricted To	Limits the search to work allocations that have been restricted to a specific resource.
Charge Code	Limits the search to work allocations that have been linked to a specific charge code.
Creation Date From *and* To	Limits the search to work allocations created within a specific date range.
Actual/Budget Over	Limits the search to work allocations for which the ratio of actual hours to current budgeted hours is greater than the percentage you specify.
Include Closed	Whether or not to include closed work allocations in the search.
Sort criteria	
Sort By	The parameter to use to sort the search results. The options are: ■ **Work Item Type** ■ **Work Item Set** ■ **Work Item** ■ **Original Budget (Hrs)** ■ **Current Budget (Hrs)**
Ascending *or* Descending	Displays the results in ascending or descending order.
*Maximum Lines Displayed	Sets the maximum number of results to display on a page.

4. Click **Search.**

   Work allocations matching the search criteria are displayed on the Work Allocation Search Results page. The column headings include the **Sort By** options.



5. Perform one of the following operations:

   Do not attempt to perform any combination of the following operations at the same time.

   - To edit work allocations, select the checkboxes in the left-most column for one or more work allocations (if you want to update all of the displayed work allocations, click **Check All**), then click **Edit.**

     The Edit Work Allocations page appears. Edit the page as desired and click **Done.** For information about the fields, see *Creating Work Allocations* on page 101.

   - To delete work allocations, select the ones to delete using the checkboxes in the **Delete** column, then click **Delete.** Work allocations that have time logged against them are shown as **In use** and cannot be deleted.

   - To close work allocations, select the ones to close using the checkboxes in the **Close** column, then click **Close.**

6. On the Work Allocation Search Results page, click **Done.**

6 Integrating Time Management and Project Management

In This Chapter:

Overview of Integrating Time Management and Project Management

This chapter details the procedures that project managers use to integrate HP Time Management and HP Project Management. Integration is performed on a project-by-project basis. For background information on the use of the My Tasks portlet and project integration, see *Using the My Tasks Portlet* on page 76 and *Integration of HP Time Management and HP Project Management* on page 77.

In the Project Settings page for a project, use the **Cost and Effort** policy (primarily its **Time Management** section) to integrate HP Time Management and HP Project Management for the project. There you specify:

- At what level of detail the project's tasks are tracked on time sheets
- Who can log time for the project
- Whether certain project representatives must approve time logged
- Which effort fields are tracked
- Other aspects of integration

In configuring integration, consider the following:

- Any resource who is licensed for HP Time Management must use time sheets or the My Tasks portlet, rather than the project work plan, to enter actuals for integrated projects.
- You can configure which actuals fields are enabled on a project. For integrated projects, where HP Time Management is used to track project actuals, the **Actual Effort** field must be enabled for the project.
- You can configure the level of the project (Project, Summary Task level 2 to 7, or Task) against which resources log time. If time is logged at summary task level 2, for example, resources who are assigned to any tasks that are hierarchically under level 2 report time for those tasks only at summary task level 2.
- If Estimated Remaining Effort is enabled for the project, time must be logged at the task level.
- After time is logged against an integrated project, you cannot change the level at which time is logged from a summary task level to the task level.
- After time is logged against an integrated project, you cannot disable integration.

- Resources cannot contribute time to the same task from both HP Project Management and HP Time Management. Therefore, if you plan to establish integration with HP Time Management for a project having tasks that are partially complete, first ensure that actuals are up to date, then divide each partially completed task into a completed task having the actuals that were previously entered and a new task that will capture subsequent actuals from time sheets.

In addition to the **Time Management** section, the **Cost and Effort** policy also has a **Resource Load Settings** section (see step 6 on page 116) and a **Financial Management** section.

In the **Financial Management** section, you can specify whether to use automatic cost calculation so that, whenever a resource updates and saves a time sheet, HP Time Management automatically passes the effort data to HP Project Management, which calculates and updates the actual labor cost for the project. (Then the actual labor cost cannot be edited directly in HP Project Management.) If you specify manual cost calculation, HP Time Management still passes effort data to HP Project Management, but HP Project Management does not calculate actual labor cost. For more information, see the *HP Project Management User's Guide.*

The **Project Fields** policy in the Project Settings page determines whether **Estimated Finish Date** and certain other fields are tracked.

Integrating Time Management and Project Management

To integrate HP Time Management and HP Project Management for a particular project:

1. From the menu bar in the standard interface, select **Project Management > Projects & Tasks > Search Projects.**

   The Search Projects window opens.

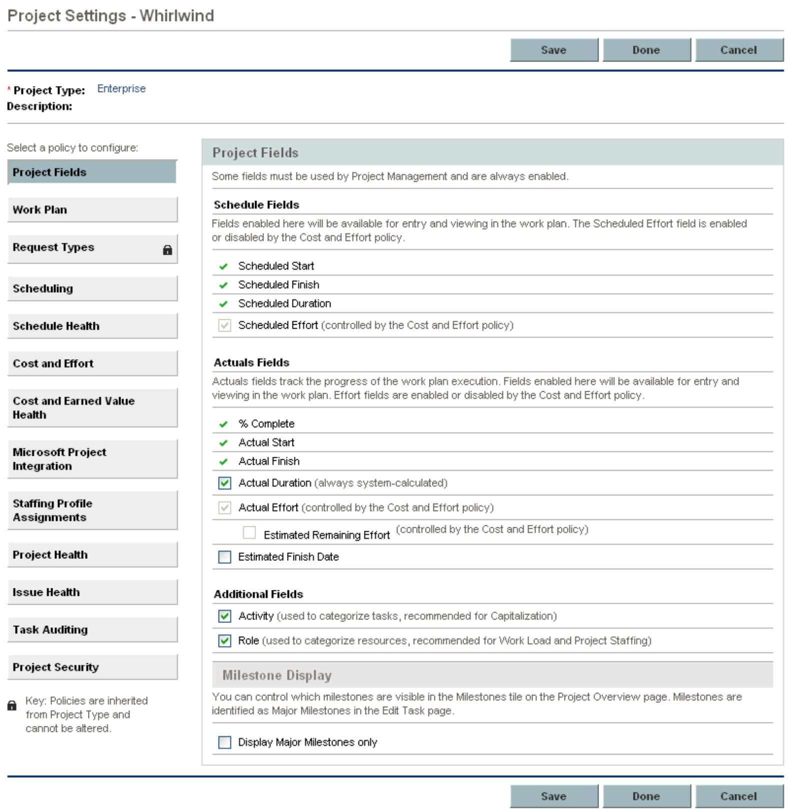
2. Enter search criteria as desired and click **Search.** To display all projects, click **Search** without entering search criteria.

3. Select a project and click its **Project Name** to open it.

   The Project window opens.

4. Click **Project Settings.**

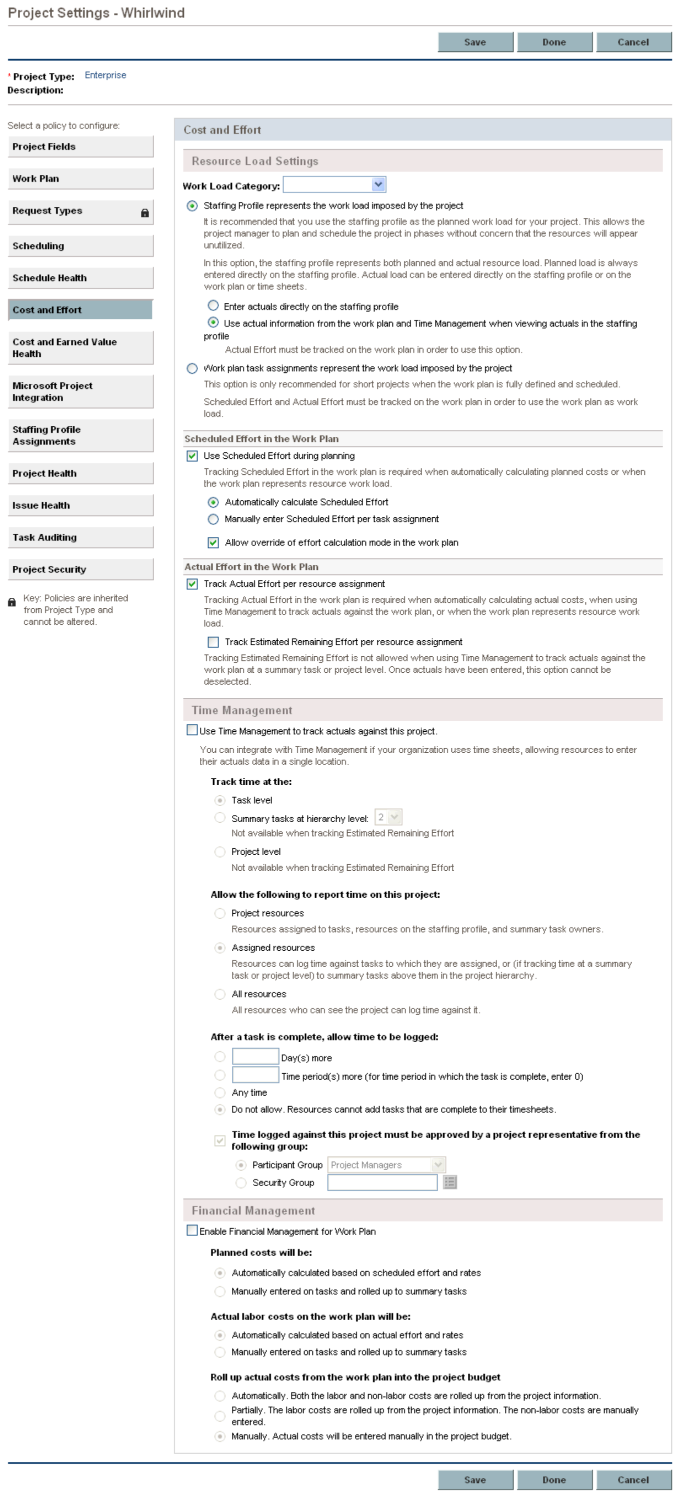
The Project Settings page opens, with a column of buttons, one for each policy, under the text **Select a policy to configure.**



Depending on the project type, particular policies might or might not be editable, as indicated by the absence or presence of a **Lock** icon in the button for the policy.

The **Project Fields** policy is selected by default. For information about configuring the **Project Fields** policy, see the *HP Project Management User’s Guide.*

5. In the list of policies buttons, click **Cost and Effort** to open the **Cost and Effort** policy.



6. In the **Resource Load Settings** section of the **Cost and Effort** policy:

   a. In the **Scheduled Effort in the Work Plan** subsection, select the **Use Scheduled Effort during planning** checkbox (it is selected by default) if you want to automatically calculate planned costs (see step 9 on page 118) or if the work plan represents resource workload. If Scheduled Effort is tracked, the resource's Scheduled Effort for a given task and its descendants is displayed in the **Expected Hours** field on the time sheet.

   b. In the **Actual Effort in the Work Plan** subsection, select the **Track Actual Effort per resource assignment** checkbox (it is selected by default).

      Note that if you also select the **Track Estimated Remaining Effort per resource assignment** option, resources must report time at the **Task level** as specified in step 8.

   For information about setting other options in the **Resource Load Settings** section of the **Cost and Effort** policy, see the *HP Project Management User's Guide.*

7. In the **Time Management** section of the **Cost and Effort** policy, select the **Use Time Management to track actuals against this project** checkbox (it is deselected by default). Selecting this checkbox enables selection of its subordinate options.

> After tasks for the project have been added to a time sheet, you cannot disable integration, that is, you cannot deselect this option.

8. Configure the details of tracking, logging, and approving time:

   a. Under the **Track time at the** heading, specify the level (the detail) at which resources must report time spent on this project's tasks on their time sheets:

      - **Task level**
      - **Summary tasks at hierarchy level:** (**2** to **7**)
      - **Project level**

      If time sheets exist for the project, this field cannot be changed from **Summary tasks at hierarchy level** or from **Project level** to **Task level.**

      Resources must report time at the **Task level** if Estimated Remaining Effort is tracked in the project's work plan (that is, the **Track Estimated Remaining Effort per resource assignment** option is selected in the **Actual Effort in the Work Plan** subsection of the **Resource Load Settings** section of the **Cost and Effort** policy).

b. Under the **Allow the following to report time on this project** heading, specify the group of resources allowed to report time (at the level specified in step a):

- **Project resources.** Resources associated with the project—resources assigned to tasks, resources in the staffing profile, and summary task owners—can log time against any task in the project.

- **Assigned resources.** If time is tracked at the **Task level** (as specified in step a), resources who are assigned to the task can log time against it. If time is tracked at **Summary tasks at hierarchy level: <*X*>** or at the **Project level** (as specified in step a), resources can log time against summary tasks in the project hierarchy that are above the tasks to which they are assigned. This is the default option.

- **All resources.** All resources who can see the project can log time against any task in the project.

c. Under the **After a task is complete, allow time to be logged:** heading, specify whether and for how long time can be logged against a task after its Actual Finish Date (its completion date):

- A number of **Day(s) more**

- A number of **Time period(s) more.** To allow logging until the end of the time period in which the task is completed, enter `0`.

- **Any time** after the task is completed.

- **Do not allow. Resources cannot add tasks that are complete to their time sheets.**

d. Under the **Time logged against this project must be approved by a project representative from the following group** heading, specify whether this project requires that time be approved by a project representative and, if so, to which type of group the approver must belong:

- A **Participant Group** of **Project Managers, Stakeholders**, or **Summary Task Owners**

- A **Security Group**

If you specify here that time approval by a project representative is required, that requirement supersedes any automatic approval that might be specified in a resource’s time sheet policy. For more information about how approvers are determined, see *Determining Time Approvers* on page 80.

9. Complete the **Financial Management** section of the **Cost and Effort** policy if you want HP Project Management to calculate actual labor costs based on actual effort passed from HP Time Management. For more information, see the *HP Project Management User's Guide.*

10. In the **Project Settings** page, click **Save.**

    The changes to the project are saved.

➤ After any of a project's tasks have been added to a time sheet, you cannot disable integration of HP Time Management and HP Project Management for the project.

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