

# HP Project and Portfolio Management Center

Software Version: 9.20

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## HP Time Management User's Guide

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# 1 Getting Started with HP Time Management

## 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 requests, projects, tasks, 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 15.

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

On an ongoing basis, the time sheets for a resource cover a consistent reporting period, such as weekly or semimonthly. 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 do the following:

- Create and manage time sheets (many resources 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 packages and miscellaneous items, if needed
- Compare actual time reported by users against estimated time and associated costs

Chapter 1, *Getting Started with HP Time Management*, on page 9 (this chapter), provides the following:

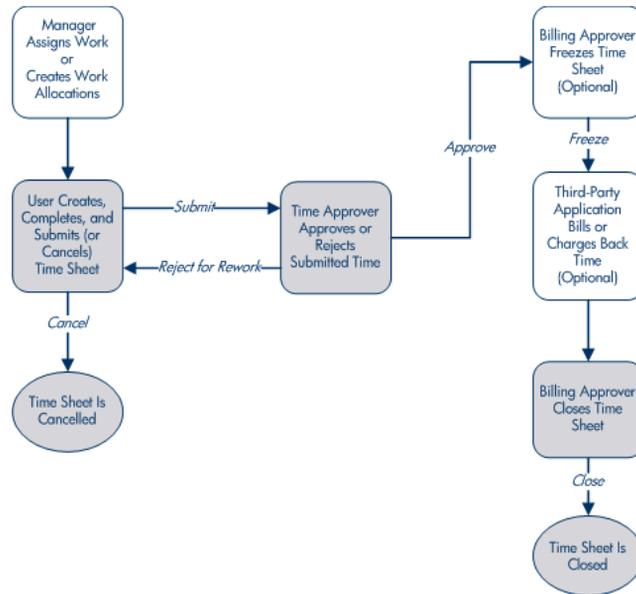
- Overview of the processing of time sheets
- Introductions to using activities, work items, the My Tasks portlet, and integration with HP Project Management
- List of other documents related to HP Time Management

## Overview of the Time Management Process

HP Time Management uses time sheets to efficiently manage 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 for packages and miscellaneous work items, one per work item, to specify the following:

- 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.

Chapter 5, *Creating Work Allocations for Users*, on page 133, provides details about how managers or planners can create, edit, cancel, and delete work allocations.



Work allocations for projects and tasks are superseded by the ability to assign resources and expected time to them when HP Time Management and HP Project Management are integrated using the Cost and Effort policy in project settings (see [Chapter 6, \*Integrating Time Management and Project Management\*, on page 147](#)).

Work allocations for requests are superseded by the ability to assign resources to request types (see the *HP Demand Management Configuration Guide*).

HP strongly recommends that you *not* use work allocations for projects, tasks, or requests, but only for packages and miscellaneous items as needed.

## 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 100](#).

[Chapter 2, \*Reporting Your Time\*, on page 19](#), 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 96](#) 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 107](#), 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 100](#).

## 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 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 127](#), 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 127, 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*.) 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. (In time sheet policies, administrators can enable or disable entry of any activities and, if entry is enabled, they can require that activities be specified on time sheets for particular work item types, such as requests or tasks. 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 that activity.)

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

## Using Work Items in Time Sheets and Work Allocations

HP Time Management can use the following 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*.
- **Project.** A project in HP Project Management. Projects can specify whether they track time 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*.
- **Task.** A task in a project in HP Project Management. For detailed information about tasks, see the *HP Project Management User's Guide*.
- **Package.** A package in HP Deployment Management. For detailed information about packages, see the *HP Deployment Management User's Guide*.
- **Miscellaneous.** A miscellaneous item in HP Time Management, such as meetings and vacation. 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, the resource selects which type of work item to add, selects the specific item of that type, and adds that item to the 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 19.
- When a planner creates an allocation for a work item, the planner selects the type of work item and then selects the specific item of that type for which to create the allocation. Work allocations support packages and miscellaneous work items. For information about work allocations, see [Chapter 5, Creating Work Allocations for Users](#), on page 133.

Each of these work items types can be enabled or disabled by the administrator. This document assumes that all work item types are enabled.

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 11. 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 the following:

- 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 tasks in 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 102 and *Integration of HP Time Management and HP Project Management* on page 104.

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 147.

## 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 Demand Management Configuration 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

### 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 tasks in 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 107](#).

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 or she 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. Statuses 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 87.

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 **Other Actuals** and **Additional Information** tabs as needed. The fields on the **Other Actuals** tab apply to only tasks and requests.
- Complete time sheet line details as needed to specify the activity breakdown (if your time sheet policy allows entry of activities) and to specify 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 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 audit trail of events for a time sheet.

# 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 100.

To create a time sheet:

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

The Create Time Sheet page appears.

The screenshot shows the 'Create Time Sheet' page with the following fields and values:

- \*Time Period:** 1/1/13 - 1/15/13
- \*Resource:** Joseph Banks
- \*Description:** Joseph Banks - 1/1/13 - 1/15/13

There is a checkbox labeled 'Include Items from My Items List' which is unchecked. A 'Create' button is visible at the bottom right of the form.

- If your 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 indicating that duplicate time sheets are not allowed, as in the example below.

The screenshot shows the 'Create Time Sheet' page with a warning message at the top: 'A Time Sheet for this Time Period and Resource already exists. Duplicate Time Sheets are not allowed. Please choose another Time Period or Resource. [Open Time Sheet](#)'. Below the warning, the form fields are the same as in the previous screenshot, but the 'Create' button is disabled.

- If your time sheet policy allows more than one time sheet for the combination of **Time Period** and **Resource** you specify, and one or more already exist, a message is displayed as in the example below. You can still create another time sheet for that period, and its **Description** will end in a new number.

The screenshot shows the 'Create Time Sheet' page with a message at the top: 'A Time Sheet for this Time Period and Resource already exists. [Open Time Sheet](#)'. Below the message, the form fields are the same as in the previous screenshots, but the description field now contains 'Joseph Banks - 1/1/13 - 1/15/13 #2'. The 'Create' button is enabled.

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

Field Name (*Required)	Description
*Time Period	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 <a href="#">Delegation on page 108</a> ), you can select that resource's name from the list that appears when you click the icon for this field.
*Description	Description of the time sheet. By default, this is the <b>Resource</b> , followed by a hyphen (-), followed by the <b>Time Period</b> .
Include Items from My Items List	Option to include items from the My Items list on the new time sheet. Up to 200 items are included. Closed items are not included. For information about creating and maintaining the My Items list, see <a href="#">Using the My Items List on page 37</a> . <b>Note:</b> Your selection for this option persists from session to session. If you are creating the time sheet as a manager or delegate for another resource, HP Time Management uses the My Items list of that resource.

The Create Time Sheet page can also include the option **Include Items from My Last Time Sheet**, but only if the administrator has configured the option to appear and a time sheet exists for the most recent previous time period. If this option appears, subordinate options also appear, allowing you to do the following for the new time sheet:

- Specify which time sheet from the previous period to use as a source. If multiple time sheets for a period are allowed and listed, you must select one.
- From the previous time sheet, include closed items, that is, requests that are closed; tasks that are complete and whose projects still allow time to be logged; and packages that are closed.
- Include Notes from the previous time sheet and its lines.

You cannot select both the **Include Items from My Items List** option and the **Include Items from My Last Time Sheet** option.

For administrators: To make the **Include Items from My Last Time Sheet** option available, set the `TM_DISABLE_INCLUDING_LAST_TS_ITEMS` parameter in the `server.conf` configuration file to `false`. HP recommends retaining the default value of `true`.

#### 4. Click **Create**.



If you logged into PPM Center in English, the first time (and *only* the first time) you open a time sheet, a message appears describing some circumstances under which HP Time Management saves time sheets automatically. This guide describes those circumstances in context. An administrator can disable display of this message by setting the `TM_ENABLE_SHOW_WHATS_NEW` `server.conf` parameter to `false`.

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

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

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

Joseph Banks - Time Sheet for 1/1/13 - 1/15/13 (Unsubmitted) Save Cancel More

Resource: Joseph Banks Time Period: 1/1/13 to 1/15/13 Time Sheet #: 1  
\*Description: Joseph Banks - 1/1/13 - 1/15/13 Status: Unsubmitted

Add Items Approvals/Transaction Details Time Sheet Policies

**Time Sheet Details** (All times shown in hours)

Time Breakdown Other Actuals Additional Information

Notes  
Add Notes

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

# 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) that includes a number of lines (work items), but no data for time worked on them. The procedures for adding lines, reporting time, specifying other required data, and submitting a time sheet for approval are described in subsequent sections.

▶ The time sheet page is not reloaded on the screen when time sheet policy violations and invalid data values occur, so you can see faster presentation of error messages. For more information on time sheet policy, see *Time Sheet Policies*.

Figure 2-1. Example time sheet

Joseph Banks - Time Sheet for 1/1/13 - 1/15/13 (Unsubmitted) Save Save & Submit More

Resource: Joseph Banks Time Period: 1/1/13 to 1/15/13 Time Sheet #: 1  
 \*Description: Joseph Banks - 1/1/13 - 1/15/13 Status: Unsubmitted  
 Add Items ▾ Approvals/Transaction Details Time Sheet Policies

Time Sheet Details (All times shown in hours)

Time Breakdown \*Other Actuals Additional Information Group | Ungroup Items

Item	Activity	Expected Hours	Tue 1/1	Wed 1/2	Thu 1/3	Fri 1/4	Sat 1/5	Sun 1/6	Mon 1/7	Tue 1/8	Wed 1/9	Total
<input type="checkbox"/> Analyst Research Project: 30917												
<input type="checkbox"/> Task: Development Complete (Analyst Research)		8.0	2.00	1.00	1.00	2.00	0.00	0.00	0.00	0.00	0.00	6.00
<input type="checkbox"/> Task: Internal QA Complete (Analyst Research)		8.0	0.00	2.00	1.00	0.00	1.00	1.00	0.00	0.00	0.00	5.00
<input type="checkbox"/> Misc -												
<input type="checkbox"/> Misc: Meetings		0.0	1.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	4.00
<b>Line Actions:</b>			3.00	4.00	3.00	3.00	1.00	1.00	0.00	0.00	0.00	15.00

Line Details Remove Rework

Notes Add Notes

The title of the time sheet has the following format:

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

Above 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
Save button	Saves the edits made to the time sheet.
Save & Submit button	Saves and submits this time sheet. (This 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. (This button replaces the Save & Submit button when a time sheet is submitted.)
Cancel button	Cancel the edits made to the time sheet.
Copy Time Sheet button	See <a href="#">Copying a Time Sheet on page 94</a> .
Cancel Time Sheet button	See <a href="#">Cancelling a Time Sheet on page 96</a> .
View Audit Trail button	See <a href="#">Viewing the Audit Trail on page 97</a> .
Printable Version button	See <a href="#">Printing a Time Sheet on page 96</a> .
Export Time Sheet button	Exports the time sheet to a Microsoft® Excel worksheet. <b>Note:</b> If your browser is Microsoft Internet Explorer 7, you must configure its Internet Options as described in the <i>Getting Started</i> document to export a time sheet to Microsoft Excel.
Resource	(Read-only) Person for whom the time sheet was created. See <a href="#">Creating a Time Sheet on page 22</a> .
Time Period	(Read-only) See <a href="#">Creating a Time Sheet on page 22</a> .
Time Sheet #	(Read-only) A sequence number that is automatically assigned to the time sheet. It is usually <b>1</b> . However, it can be greater than <b>1</b> 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.

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

Field (*Required), Button, or Link	Description
*Description	Description of the time sheet, which can be modified for a created time sheet. See <a href="#">Creating a Time Sheet on page 22</a> .
Status	(Read-only) Current status of this time sheet. For summary information about time sheet statuses, see <a href="#">Summary of Time Sheet Line Statuses and Time Sheet Statuses on page 87</a> .
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 <a href="#">Adding Work Items to a Time Sheet on page 32</a> .
Approvals/Transaction Details link	See <a href="#">Time Approvals and Transaction Details on page 84</a> .

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

- **Time Breakdown** tab (selected by default), as shown in [Figure 2-1 on page 25](#) and described in [Reporting Time on the Time Breakdown Tab on page 67](#). In the example of [Figure 2-1](#), time is entered in units of hours, with a column for each day of the time period and a row for each work item. As in [Figure 2-1](#), a horizontal scroll bar might be needed to display all of the columns, depending on your screen resolution and how time is logged.

See [Organization of Time Sheet Lines on a Time Sheet on page 72](#) for information about how the work items are organized on the time sheet.

- **Other Actuals** tab (see [Completing the Other Actuals Tab on page 75](#)).
- 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 78](#)).

In addition, the columns, buttons and links 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 links on all Time Sheet Details tabs  
(page 1 of 3)

Column, Button, or Link	Description
Group   Ungroup Items link	<p>Allows you to show work items with or without headings (in bold) that represent logical groupings. For details about groups and the order of work items (rows) when they are grouped or ungrouped, see <a href="#">Organization of Time Sheet Lines on a Time Sheet on page 72</a>.</p> <p>The default is to show items with headings, that is, grouped, as in <a href="#">Figure 2-1 on page 25</a>.</p> <p>Using the <b>Ungroup</b> option makes the time sheet shorter than the <b>Group</b> option, and it probably makes the time sheet easier for you to use if you work on many different projects, tasks, requests, etc.</p> <p>Click the available link in <b>Group   Ungroup Items</b> if you want to change the appearance of the time sheet to include or exclude groups for work items. The option you selected most recently has no link. Until you change the option, it applies to all your existing and new time sheets. <a href="#">Figure 2-2 on page 31</a> shows the same time sheet as <a href="#">Figure 2-1 on page 25</a>, but with the items ungrouped.</p>
[if configured to be available, three buttons to select the displayable vertical size of time sheet tables]	<p>If an administrator has set the <code>TM_ENABLE_GRID_SIZE_CONTROL</code> <code>server.conf</code> parameter to <code>true</code>, three mutually exclusive buttons to control the displayable vertical size of the tables in all the tabs of your existing and new time sheets. From left to right, the buttons have the following appearance and corresponding tooltips indicating relative vertical size:</p> <ul style="list-style-type: none"> <li>• One horizontal line, with the tooltip Small (selected by default)</li> <li>• Two horizontal lines, with the tooltip Medium</li> <li>• Three horizontal lines, with the tooltip Large</li> </ul> <p>If your screen's vertical resolution is more than 1024 pixels, in some cases selecting Medium or Large allows you to see more time sheet lines on your screen without scrolling the table, as well as less white space below the table.</p>

Table 2-2. Columns, buttons, and links on all Time Sheet Details tabs  
(page 2 of 3)

Column, Button, or Link	Description
[column of check boxes]	One check box for each time sheet line and, if items are grouped as described above, one additional check box for each group heading. When you select (or clear) the check box for a group, the check boxes for all of its subordinate items are automatically selected (or cleared).
Item column	Names and other information about each item (work item). For some work item types, the information displayed depends on whether items are grouped or ungrouped. For more information, see <a href="#">Organization of Time Sheet Lines on a Time Sheet on page 72</a> .  <b>Note:</b> An administrator can configure the <code>TM_DYNAMIC_DESC_CHARS</code> and <code>TM_DYNAMIC_DESC_CHARS_MAX</code> <code>server.conf</code> parameters to dynamically expand and contract the width of this column based on the longest work item information. For more information, see the <i>Installation and Administration Guide</i> .
Status column	(Displayed only if the time sheet has been submitted) Status of each item (time sheet line). For summary information about time sheet line statuses, see <a href="#">Summary of Time Sheet Line Statuses and Time Sheet Statuses on page 87</a> .
Activity column	(Displayed only if your time sheet policy allows entry of activities) 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 <a href="#">Using Activities To Categorize Time To Be Tracked on page 14</a> and <a href="#">Charge Codes/Activities (or Charge Codes) Tab on page 80</a> .

Table 2-2. Columns, buttons, and links on all Time Sheet Details tabs  
(page 3 of 3)

Column, Button, or Link	Description
<p>Line Details button (under the <b>Line Actions:</b> heading)</p>	<p>Opens the Line Details window for the selected time sheet line (work item). This window includes the tabs described in <a href="#">Viewing and Specifying Time Sheet Line Details on page 80</a>.</p> <p>This button appears only when the time sheet has at least one time sheet line. The button is enabled only when one check box is selected for one time sheet line.</p>
<p>Remove button (under the <b>Line Actions:</b> heading)</p>	<p>Removes the selected time sheet lines from the time sheet.</p> <p>This button appears only when the time sheet has at least one time sheet line. The button is enabled only when at least one check box is selected for Unsubmitted or Rejected lines.</p>
<p>Rework button (under the <b>Line Actions:</b> heading)</p>	<p>Allows rework of the selected time sheet lines and changes their status to Unsubmitted. For more information, see <a href="#">Reworking Lines on or Adding Lines to a Submitted Time Sheet on page 93</a>.</p> <p>This button appears only when the time sheet has at least one time sheet line. The button is enabled only when at least one check box is selected for lines on a previously submitted time sheet. The time sheet must have a status of Pending Approval, Approved, or In Rework, but not Frozen or Closed. (You can rework lines whether the time approver has approved them, rejected them, or neither approved nor rejected them.)</p>

Figure 2-2 shows the same time sheet as Figure 2-1 on page 25, but with the items ungrouped. For more information, see Table 2-2 on page 28 and Organization of Time Sheet Lines on a Time Sheet on page 72.

Figure 2-2. Example time sheet with items ungrouped

Joseph Banks - Time Sheet for 1/1/13 - 1/15/13 (Unsubmitted) Save Save & Submit More

Resource: Joseph Banks Time Period: 1/1/13 to 1/15/13 Time Sheet #: 1  
 Description: Joseph Banks - 1/1/13 - 1/15/13 Status: Unsubmitted

Add Items ▾ Approvals/Transaction Details Time Sheet Policies ▶

Time Sheet Details (All times shown in hours)

Time Breakdown \*Other Actuals Additional Information Group | Ungroup Items

Item	Activity	Expected Hours	Tue 1/1	Wed 1/2	Thu 1/3	Fri 1/4	Sat 1/5	Sun 1/6	Mon 1/7	Tue 1/8	Wed 1/9	Total
<input type="checkbox"/> Task: Development Complete (Analyst Resaerch)		8.0	2.00	1.00	1.00	2.00	0.00	0.00	0.00	0.00	0.00	6.00
<input type="checkbox"/> Task: Internal QA Complete (Analyst Resaerch)		8.0	0.00	2.00	1.00	0.00	1.00	1.00	0.00	0.00	0.00	5.00
<input type="checkbox"/> Misc: Meetings		0.0	1.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	4.00
<b>Line Actions:</b>			3.00	4.00	3.00	3.00	1.00	1.00	0.00	0.00	0.00	15.00

Line Details Remove Rework

Notes [Add Notes](#)

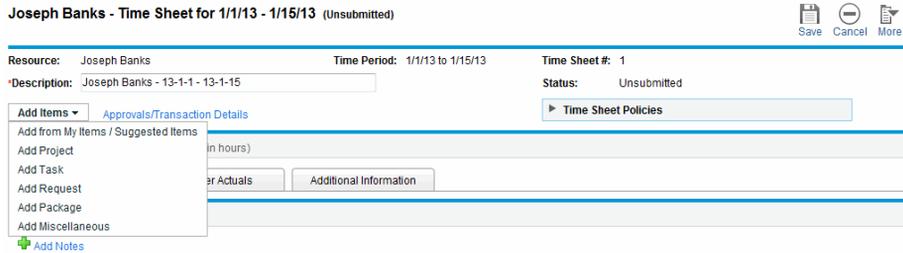
Finally, a **Notes** section appears at the bottom of the time sheet. Clicking its **Add Notes** button allows you to add notes to the time sheet.

When you add a note to a time sheet, the time stamp column for **Notes** shows **Pending Save** for the note until you save the time sheet. After you save the time sheet, the time stamp for the note is updated to that time.

# Adding Work Items to a Time Sheet

To add work items (time sheet lines) to the time sheet in order to log time against them, whether the time sheet is new or already has some work items:

## 1. Click **Add Items**.



The screenshot shows the 'Joseph Banks - Time Sheet for 1/1/13 - 1/15/13 (Unsubmitted)' interface. At the top right are 'Save', 'Cancel', and 'More' icons. Below the title bar, there are fields for 'Resource: Joseph Banks', 'Time Period: 1/1/13 to 1/15/13', and 'Time Sheet #: 1'. A 'Description' field contains 'Joseph Banks - 13-1-1 - 13-1-15'. To the right, the 'Status' is 'Unsubmitted'. A 'Time Sheet Policies' dropdown is also visible. The 'Add Items' dropdown menu is open, showing options: 'Add from My Items / Suggested Items', 'Add Project', 'Add Task', 'Add Request', 'Add Package', 'Add Miscellaneous', and 'Add Notes'. The 'Add from My Items / Suggested Items' option is highlighted. Below the dropdown, there are input fields for 'in hours)', 'er Actuals', and 'Additional Information'.

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 Suggested Items list or the My Items list. The Suggested Items list is automatically generated by HP Time Management for your convenience. The My Items list is a personal list of items you build and maintain, and its items are retained until you delete them. (See [Using the Suggested Items List on page 34](#) and [Using the My Items List on page 37](#).)



Some of the following options in the drop-down list might not be available to you, based on system settings and the time sheet policy that is assigned to you. This document assumes that all options are available to you.

- **Add Project.** See [Adding Projects Directly to a Time Sheet on page 51](#).
- **Add Task.** See [Adding Tasks Directly to a Time Sheet on page 54](#).
- **Add Request.** See [Adding Requests Directly to a Time Sheet on page 60](#).
- **Add Package.** See [Adding Packages Directly to a Time Sheet on page 64](#).

- **Add Miscellaneous.** This option is used for meetings, vacation, and other items. See [Adding Miscellaneous Items Directly to a Time Sheet on page 65](#).

If you select any of the options to add a particular work item type—project, task, request, package, or miscellaneous—directly to the time sheet, after you select the type of item to add, the corresponding Add <work item type> to Time Sheet window appears. Its fields serve as filter criteria when you add projects, tasks, requests, or packages. 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 filter 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 **Save & Submit** button appears so that you can submit the time sheet.

If you type any amounts of time into time sheet lines on the **Time Breakdown** tab (see [Reporting Time on the Time Breakdown Tab on page 67](#)) without saving the time sheet, and then you add a line to or remove a line from the time sheet, HP Time Management saves the time sheet automatically.

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 [Time Sheets and Time Sheet Lines on page 25](#).

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

## 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. In general, these items include:

- Items that are both assigned to you and which you are scheduled to work on during the current time period
- Items 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 2-3*. You cannot revise the Suggested Items list.

Figure 2-3. Example Suggested Items list

Item	Description	Reason
<input type="checkbox"/> Project: ERP Financial Upgrade	ERP Financial Upgrade	On previous time sheet
<input type="checkbox"/> Package #30014 - OraApps Patch Deployment	Oracle Apps Patch	On previous time sheet
<input type="checkbox"/> Package #30012 - Oracle - Standard Deployment Process	Updates to Payroll	On previous time sheet
<input type="checkbox"/> Package #30010 - SAP - Transport and J2EE Deployments	SAP Changes	On previous time sheet

By default, the Suggested Items list includes the following items:

- Each work item of any type that meets *both* of the following conditions:
  - It is on the time sheet you submitted for the time period that immediately precedes the period of this time sheet.
  - It is available for you to log time against (because it is not closed).

- Each project that meets *both* of the following conditions:
  - It contains tasks that are assigned to you.
  - It uses HP Time Management to track time at the project level. For more information, see [Chapter 6, \*Integrating Time Management and Project Management\*](#), on page 147.
- Each summary task that meets *both* of the following conditions:
  - It contains tasks that are assigned to you.
  - It is in a project that uses HP Time Management to track time at a specified summary task level. For more information, see [Chapter 6, \*Integrating Time Management and Project Management\*](#), on page 147.
- Each task that meets *all* of the following conditions:
  - It is assigned to you.
  - It is in a project that uses HP Time Management to track time at the task level. For more information, see [Chapter 6, \*Integrating Time Management and Project Management\*](#), on page 147.
  - It can have time logged against it during the time period of the time sheet you are completing (because its status is Ready and it has a scheduled start-to-finish date range that overlaps at least part of the time sheet's time period, or because its status is In Progress).
- Each request that meets *either* of the following conditions and is of a type that uses listed resources to report time in HP Time Management:
  - It was assigned to you to work on during the time period of the time sheet you are completing.
  - It allows all listed resources to log time and its resource list includes you. For more information, see the *HP Demand Management Configuration Guide*.

The items in the Suggested Items list appear in the following order:

- Projects
- Tasks
- Requests
- Packages
- Miscellaneous items

The date and time when the Suggested Items list was most recently updated is shown at the top of the **Suggested Items** tab. In the example of *Figure 2-3*, the user created the time sheet and HP Time Management generated its Suggested Items list on August 6, 2010, during time period 8/1/10 – 8/15/10. If you want 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 check boxes next to the items you want to add to the time sheet, or select the **Check all** check box.
4. Click **Add**.

The selected items are added to the time sheet. They remain in 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 32.

## 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*.

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 check boxes next to the items you want to copy to the My Items list, or select the **Check all** check box.
4. Click **Copy to 'My Items'**.

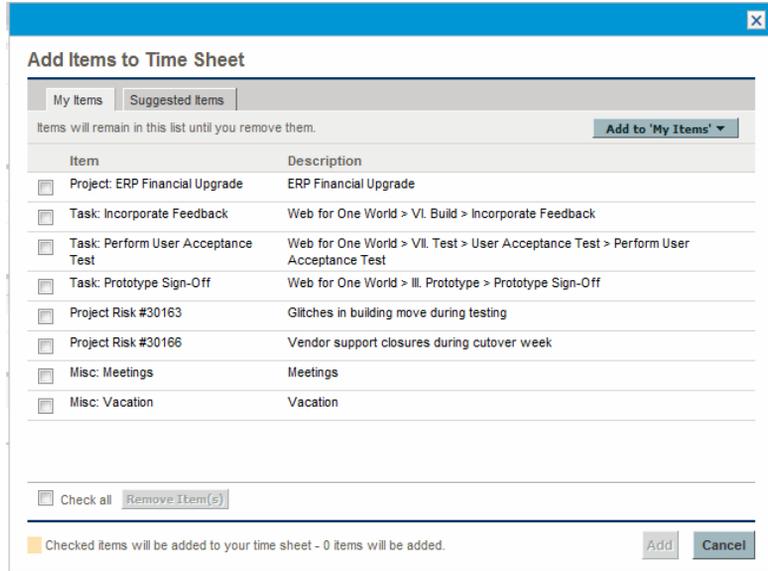
The items are copied to the My Items list. They remain in the Suggested Items list.

## 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, as in the example in *Figure 2-4*. For example, you can include the items you currently work on, items you use occasionally but want to keep readily available such as Vacation and Meetings, and items you know you will be working on in the future.

Unless you delete them, items in the My Items list remain available to quickly add to any subsequent time sheets you create.

Figure 2-4. Example My Items list



The screenshot shows a window titled "Add Items to Time Sheet" with a blue header. Below the header, there are two tabs: "My Items" (selected) and "Suggested Items". A message states: "Items will remain in this list until you remove them." To the right of this message is a button labeled "Add to 'My Items'". Below the message is a table with two columns: "Item" and "Description". The table contains the following items:

Item	Description
<input type="checkbox"/> Project: ERP Financial Upgrade	ERP Financial Upgrade
<input type="checkbox"/> Task: Incorporate Feedback	Web for One World > VI. Build > Incorporate Feedback
<input type="checkbox"/> Task: Perform User Acceptance Test	Web for One World > VII. Test > User Acceptance Test > Perform User Acceptance Test
<input type="checkbox"/> Task: Prototype Sign-Off	Web for One World > III. Prototype > Prototype Sign-Off
<input type="checkbox"/> Project Risk #30163	Glitches in building move during testing
<input type="checkbox"/> Project Risk #30166	Vendor support closures during cutover week
<input type="checkbox"/> Misc: Meetings	Meetings
<input type="checkbox"/> Misc: Vacation	Vacation

At the bottom of the table, there is a "Check all" checkbox and a "Remove Item(s)" button. Below the table, a status bar shows a yellow progress indicator and the text: "Checked items will be added to your time sheet - 0 items will be added." To the right of the status bar are "Add" and "Cancel" buttons.

When you display the My Items list, the items appear in the following order:

- Projects
- Tasks
- Requests
- Packages
- Miscellaneous items

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.



Closed items cannot be added to a time sheet from the My Items list. You should periodically delete closed items as you maintain the My Items list.

For information about the Suggested Items list, which HP Time Management generates for you, see [Using the Suggested Items List on page 34](#), 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 37](#).

## Adding Items to the My Items List

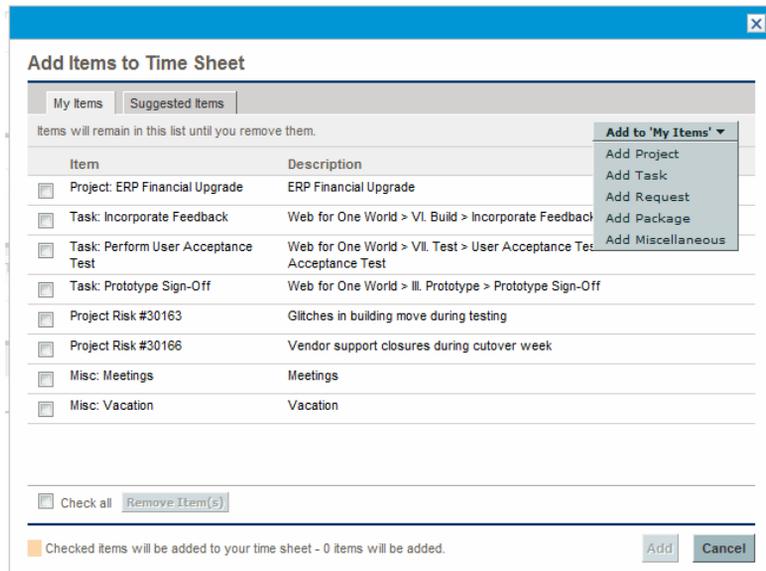
You can add items to the My Items list whether or not they are in the Suggested Items list. (To add items from the Suggested Items list to the My Items list, see [Adding Items from the Suggested Items List to the My Items List on page 37.](#))

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 Project.** See [Adding Projects to the My Items List on page 40.](#)
- **Add Task.** See [Adding Tasks to the My Items List on page 42.](#)
- **Add Request.** See [Adding Requests to the My Items List on page 46.](#)
- **Add Package.** See [Adding Packages to the My Items List on page 48.](#)

- **Add Miscellaneous.** This option is used for meetings, vacation, and other miscellaneous items. See [Adding Miscellaneous Items to the My Items List](#) on page 49.



Some of the options in the drop-down list might not be available to you, based on system settings and the time sheet policy that is assigned to you. This document assumes that all options are available to you.

After you select the type of work item—project, task, request, package, or miscellaneous—to add, the corresponding Add <work item type> to 'My Items' window appears. Its fields serve as filter criteria when you add requests, packages, projects, 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 filter 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 Projects to the My Items List](#)

As with adding other work item types to the My Items list, adding projects involves specifying filter criteria.

As an additional, automatic project filter, HP Time Management displays only the projects that do both of the following:

- Track time at the project level
- Allow you to log time against them

Projects to which you are directly assigned are displayed in the Suggested Items list. See [Using the Suggested Items List](#) on page 34.

The information in [Determining Who Can Log Time on Which Projects](#) on page 53 can help project managers understand which projects HP Time Management makes 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 following procedure.



If you cannot find a particular project for which you think you should be able to log time, contact the project manager.

To add projects to the My Items list:

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

The Add Projects to 'My Items' window opens.

2. Complete the filter fields as described in the following table:

Field Name	Description
<b>Project Filters section</b>	
Project Name Contains	Limits the list of projects to those with names that include the string you specify.
Project Resource	Limits the list of projects to those with a participant list that includes the resource you specify. (Participant lists include resources in the project's staffing profile, resources directly assigned on tasks in the work plan, and summary task owners.)
Project Manager	Limits the list of projects to those that have the project manager you specify.
Scheduled Start From	Limits the list of projects to those whose root tasks start on the date you specify or later.
Scheduled Start To	Limits the list of projects to those whose root tasks start on the date you specify or earlier.

Field Name	Description
Scheduled Finish From	Limits the list of projects to those whose root tasks are finished on the date you specify or later.
Scheduled Finish To	Limits the list of projects to those whose root tasks are finished on the date you specify or earlier.
<b>General Filters section</b>	
Modified in Last x days	Limits the list of projects to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of projects to those that were created within the number of days you specify.
Include Closed	Option to include projects that are complete and still allow time to be logged.

3. Click **Search**.

The projects that meet your filter criteria are listed.

4. Select the check boxes for the projects you want to add to the My Items list, and click **Add** to add them.

The My Items list with the added projects is displayed again.

### Adding Tasks to the My Items List

As with adding other work item types to the My Items list, adding tasks involves specifying filter criteria.

As an additional, automatic task filter, HP Time Management displays only the tasks (and summary tasks) that do both of the following:

- Track time at the task (or a specific summary task) level
- Allow you to log time against them

Tasks to which you are directly assigned (or their parent summary tasks or projects, depending on how the project tracks time) are displayed in the Suggested Items list. See *Using the Suggested Items List* on page 34.

Also, if a project has a work plan, if it tracks time at the project level, and if you are allowed to log time for it, the task filter displays the project's top-level summary task if it meets your other filter criteria.

The information in [Determining Who Can Log Time on Which Tasks on page 58](#) can help project managers understand which tasks HP Time Management makes 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 following procedure.



If you cannot find a particular task 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 Task**.

The Add Tasks to 'My Items' window opens.

**Add Tasks to 'My Items'**

**Task Filters**

Task Name Contains:  \*Project:

Task Type:  Project Assigned Resource:

Task Status:

Scheduled Start From:  Scheduled Start To:

Scheduled Finish From:  Scheduled Finish To:

**General Filters**

Modified in Last x Days:  Created in Last x Days:

Include Closed?  Yes  No

2. Complete the filter fields as described in the following table:

Field Name (*Required)	Description
<b>Task Filters section</b>	
Task Name Contains	Limits the list of tasks to those with names that include the string you specify.
*Project	<p>Using the autocomplete, limits the list of tasks to those in projects that have all of the following:</p> <ul style="list-style-type: none"> <li>• Project names that start with the characters you specify</li> <li>• Project managers whose first names start with the characters you specify</li> <li>• Project managers whose last names start with the characters you specify</li> </ul> <p>The project must have a work plan, and the user must be allowed to log time against the project or its tasks.</p>
Task Type	Limits the list to only projects, only tasks, only summary tasks, or both tasks and summary tasks.
Project Assigned Resource	Limits the list of tasks to those with the assigned resource you specify.
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.

Field Name (*Required)	Description
<b>General Filters section</b>	
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	Option to include tasks that are complete and whose projects still allow time to be logged.

3. Click **Search**.

The tasks that meet your filter criteria are listed.

4. You can display the tasks in a List view or a Hierarchical view. The List view lists the tasks that met your filter criteria. You can click a column name to sort the items in ascending or descending alphabetical order by **Task Name**, **Project Path**, or **Project Name**. The Hierarchical view displays the same set of tasks, but it organizes them in their hierarchy under their parent summary tasks and projects, and it shows the sequence numbers of the tasks in their projects' work plans.

Click the available link in **List | Hierarchical view** if you want to change the view. The option you selected most recently has no link. Until you change the option, it will continue to be used for the Add Tasks to Time Sheet window.

5. Select the check boxes for the tasks you want to add to the My Items list, and click **Add** to add them.

The My Items list with the added tasks is displayed again.

## Adding Requests to the My Items List

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

The information in [Determining Who Can Log Time on Which Requests on page 63](#) can help managers understand which requests HP Time Management makes 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 following procedure.



If you cannot find a particular request for which you think you should be able to log time, contact your manager or time approver.

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.

**Add Requests to 'My Items'**

**Request Filters**

Request Type:

Request Assigned To:

Only requests whose assigned group includes me:  Yes  No

Request Resource:

Only requests that list me as a resource:  Yes  No

Request Assigned Group:

Request Number:

**General Filters**

Modified in Last x Days:

Created in Last x Days:

Include Closed?  Yes  No

- Complete the filter fields as described in the following table:

Field Name	Description
<b>Request Filters section</b>	
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
Only requests whose assigned group includes me	If set to <b>Yes</b> , limits the list of requests to those that include you in their assigned groups
Request Resource	Limits the list of requests to those that have resource lists that include the user you specify
Only requests that list me as a resource	If set to <b>Yes</b> , limits the list of requests to those that include you in their resource lists
Request Assigned Group	Limits the list of requests to those with the Request Assigned Group you specify from a list of security groups
Request Number	Limits the list of requests to the one with the request number you specify
<b>General Filters section</b>	
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	Option to include closed requests in the list of requests

- Click **Search**.

The requests that meet your filter criteria are listed.

- Select the check boxes for the requests you want to add to the My Items list, and click **Add** to add them.

The My Items list with the added requests is displayed again.

## 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.

The screenshot shows a dialog box titled "Add Packages to 'My Items'". It has a blue header bar with a close button (X). The dialog is divided into two main sections: "Package Filters" and "General Filters".

**Package Filters section:**

- Package Workflow:** A text input field with a list icon.
- Package Assigned Group:** A text input field with a list icon.
- Package Number:** A text input field.
- Package Assigned To:** A text input field with a user icon.

**General Filters section:**

- Modified in Last x Days:** A text input field.
- Created in Last x Days:** A text input field.
- Include Closed?:** Radio buttons for "Yes" and "No", with "No" selected.

At the bottom right, there are "Search" and "Cancel" buttons.

2. Complete the filter fields as described in the following table:

Field Name	Description
<b>Package Filters section</b>	
Package Workflow	Limits the list of packages to those with the workflow you specify
Package Number	Limits the list of packages to only the one with the package number 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

Field Name	Description
<b>General Filters section</b>	
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	Option to include closed packages in the list of packages

3. Click **Search**.

The packages that meet your filter criteria are listed.

4. Select the check boxes for the packages you want to add to the My Items list, and click **Add** to add them.

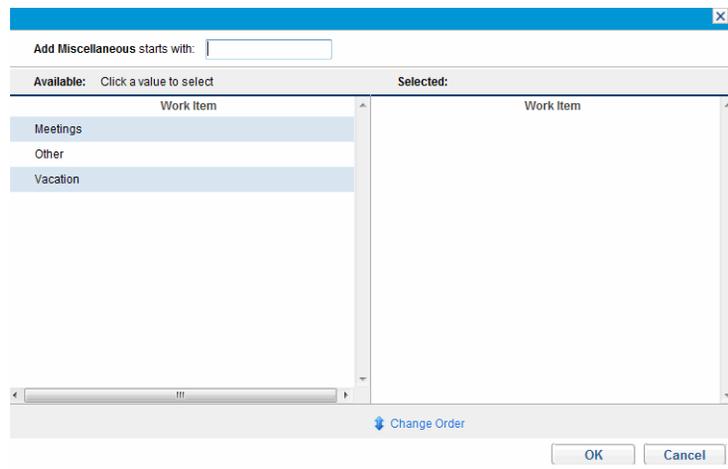
The My Items list with the added packages is displayed again.

#### 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 check boxes next to the items you want to delete, or select the **Check all** check box.
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 check boxes 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 32](#).

## Adding Projects Directly to a Time Sheet

As with adding other work item types to a time sheet, adding projects involves specifying filter criteria.

As an additional, automatic project filter, HP Time Management displays only the projects that do both of the following:

- Track time at the project level
- Allow you to log time against them

Projects to which you are directly assigned are displayed in the Suggested Items list. See *Using the Suggested Items List* on page 34.

The information in *Determining Who Can Log Time on Which Projects* on page 53 can help project managers understand which projects HP Time Management makes 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 following procedure.



If you cannot find a particular project for which you think you should be able to log time, contact the project manager.

To add projects to the time sheet:

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

The Add Projects to Time Sheet window opens.

2. Complete the filter fields as described in the following table:

Field Name	Description
<b>Project Filters section</b>	
Project Name Contains	Limits the list of projects to those with names that include the string you specify.
Project Resource	Limits the list of projects to those with a participant list that includes the resource you specify. (Participant lists include resources in the project's staffing profile, resources directly assigned on tasks in the work plan, and summary task owners.)
Project Manager	Limits the list of projects to those that have the project manager you specify.
Scheduled Start From	Limits the list of projects to those that start on the date you specify or later.
Scheduled Start To	Limits the list of projects to those that start on the date you specify or earlier.
Scheduled Finish From	Limits the list of projects to those that finish on the date you specify or later.
Scheduled Finish To	Limits the list of projects to those that finish on the date you specify or earlier.

Field Name	Description
<b>General Filters section</b>	
Modified in Last x days	Limits the list of projects to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of projects to those that were created within the number of days you specify.
Include Closed	Option to include projects whose root tasks are complete and still allow time to be logged.

3. Click **Search**.

The projects that meet your filter criteria are listed.

4. Select the check boxes for the projects you want to add to the time sheet, and click **Add** to add them.

The time sheet with the added projects (including their project numbers as well as their names) is displayed again.

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 32.

## Determining Who Can Log Time on Which Projects

This section provides detailed information about how HP Time Management automatically limits the set of projects that any resource (such as yourself) can view and then add to the My Items list or directly to a time sheet. If you only create and submit time sheets, you probably do not need to understand these details, and you can proceed to add projects to the My Items list (see *Adding Projects to the My Items List* on page 40) or to your time sheet (see *Using the Suggested Items List* on page 34 or *Adding Projects Directly to a Time Sheet* on page 51).

With the details below, project managers can understand which projects are made available to which resources. They can configure the applicable settings as described in *Chapter 6, Integrating Time Management and Project Management*, on page 147.

For a resource to add a project to the My Items list or to a time sheet, one of the following combinations of project settings (configured by the project manager) and resource responsibilities must exist:

- The project allows only project resources to log time.  
The resource is assigned to a task in the project, is in the staffing profile for the project, or is a summary task owner for the project.
- The project allows “assigned resources” to log time.  
The resource is assigned to a task in the project.
- The project allows all resources to log time.  
The resource can view the project.

## Adding Tasks Directly to a Time Sheet

As with adding other work item types to a time sheet, adding tasks involves specifying filter criteria.

As an additional, automatic task filter, HP Time Management displays only the tasks (and summary tasks) that do both of the following:

- Track time at the task (or a specific summary task) level
- Allow you to log time against them

Tasks to which you are directly assigned (or their parent summary tasks or projects, depending on how the project tracks time) are displayed in the Suggested Items list. See [Using the Suggested Items List on page 34](#).

Also, if a project has a work plan, if it tracks time at the project level, and if you are allowed to log time for it, the task filter displays the project’s top-level summary task if it meets your other filter criteria.

The information in [Determining Who Can Log Time on Which Tasks on page 58](#) can help project managers understand which tasks HP Time Management makes 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 following procedure.



If you cannot find a particular task for which you think you should be able to log time, contact the project manager.

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 Tasks to Time Sheet window opens.

**Add Tasks to Time Sheet**

Task Filters

Task Name Contains:  \*Project:

Task Type:  Project Assigned Resource:

Task Status:

Scheduled Start From:  Scheduled Start To:

Scheduled Finish From:  Scheduled Finish To:

General Filters

Modified in Last x Days:  Created in Last x Days:

Include Closed?  Yes  No

Search Cancel

2. Complete the filter fields as described in the following table:

Field Name (*Required)	Description
<b>Task Filters section</b>	
Task Name Contains	Limits the list of tasks to those with names that include the string you specify.
*Project	<p>Using the autocomplete, limits the list of tasks to those in projects that have all of the following:</p> <ul style="list-style-type: none"> <li>• Project names that start with the characters you specify</li> <li>• Project managers whose first names start with the characters you specify</li> <li>• Project managers whose last names start with the characters you specify</li> </ul> <p>The project must have a work plan, and the user must be allowed to log time against the project or its tasks.</p>
Task Type	Limits the list to only projects, only tasks, only summary tasks, or both tasks and summary tasks.
Project Assigned Resource	Limits the list of tasks to those with the assigned resource you specify.
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.

Field Name (*Required)	Description
<b>General Filters section</b>	
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	Option to include tasks that are complete and whose projects still allow time to be logged.

3. Click **Search**.

The tasks that meet your filter criteria are listed.

4. You can display the tasks in a List view or a Hierarchical view. The List view lists the tasks that met your filter criteria. You can click a column name to sort the items in ascending or descending alphabetical order by **Task Name**, **Project Path**, or **Project Name**. The Hierarchical view displays the same set of tasks, but it organizes them in their hierarchy under their parent summary tasks and projects, and it shows the sequence numbers of the tasks in their projects' work plans.

Click the available link in **List | Hierarchical view** if you want to change the view. The option you selected most recently has no link. Until you change the option, it will continue to be used for the Add Tasks to Time Sheet window.

5. Select the check boxes for the tasks you want to add to the time sheet, and click **Add** to add them.

The time sheet with the added tasks is displayed again.

6. 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 32](#).

## Determining Who Can Log Time on Which Tasks

This section provides detailed information about how HP Time Management automatically limits the set of project summary tasks and tasks that any resource (such as yourself) can view and then add to the My Items list or directly to a time sheet. If you only create and submit time sheets, you probably do not need to understand these details, and you can proceed to add tasks to the My Items list (see *Adding Tasks to the My Items List* on page 42) or to a time sheet (see *Using the Suggested Items List* on page 34 or *Adding Tasks Directly to a Time Sheet* on page 54).

With the details below, project managers can understand which tasks are made available to which resources. They can configure the applicable settings as described in *Chapter 6, Integrating Time Management and Project Management*, on page 147.

The set of tasks that a resource can view and add to the My Items list or 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 as follows:
  - Task level
  - Summary tasks at a specified hierarchy level
  - Project level
- Who is allowed to log time for the project. The options are as follows:
  - **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.) If the project tracks time at the task level, resources who are assigned to the task can log time against it at that level only. If the project tracks time at the project level or by summary task at a specified hierarchy level, resources who are assigned to tasks at lower levels in that project can log time representing those tasks only at the higher project or summary task level.
  - **All resources.** All resources who can view the project (as controlled by the Project Security policy) can log time against any task in the project.

For example, suppose project PROJ includes the following:

- 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 project PROJ tracks time and who is allowed to log time on project PROJ. In this example, note the following:

- If the project tracks time 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 the project tracks time 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 the project tracks time 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 the project tracks time 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 User2 is assigned.

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

Resources Allowed to Log Time for PROJ		Level at Which PROJ Tracks Time			
		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 Requests Directly to a Time Sheet

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

The information in [Determining Who Can Log Time on Which Requests on page 63](#) can help managers understand which requests HP Time Management makes 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 following procedure.



If you cannot find a particular request for which you think you should be able to log time, contact your manager or time approver.

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 following table:

Field Name	Description
<b>Request Filters section</b>	
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
Only requests whose assigned group includes me	If set to <b>Yes</b> , limits the list of requests to those that include you in their assigned groups
Request Resource	Limits the list of requests to those that have resource lists that include the user you specify
Only requests that list me as a resource	If set to <b>Yes</b> , limits the list of requests to those that include you in their resource lists

Field Name	Description
Request Assigned Group	Limits the list of requests to those with the Request Assigned Group you specify from a list of security groups
Request Number	Limits the list of requests to the one with the request number you specify
<b>General Filters section</b>	
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	Option to include closed requests in the list of requests

3. Click **Search**.

The requests that meet your filter criteria are listed.

4. Select the check boxes for the requests you want to add to the time sheet, and click **Add** to add them.

The time sheet with the added requests is displayed again.

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 32](#).

## Determining Who Can Log Time on Which Requests

This section provides detailed information about how HP Time Management automatically limits the set of requests that any resource (such as yourself) can view and then add to the 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 requests to the My Items list (see [Adding Requests to the My Items List on page 46](#)) or to your time sheet (see [Using the Suggested Items List on page 34](#) or [Adding Requests Directly to a Time Sheet on page 60](#)).

With the details below, managers can understand which requests are made available to which resources. They can configure the applicable settings as described in the *HP Demand Management Configuration Guide*.

The only requests that a resource can view and add to the My Items list or to a time sheet are the ones based on request types that are configured to use HP Time Management to track actuals. These request types can further limit access to requests to the following resources:

- Resources assigned to the request during the time sheet's time period
- Resources listed on the request, if the request type tracks resource assignments
- Resources who are or were in the assigned groups during the time sheet's time period
- All request participants
- For requests that include the PFM Asset field group, all resources allocated in the staffing profile

## 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.

The screenshot shows a window titled "Add Packages to Time Sheet". It features a "Package Filters" section with four input fields: "Package Workflow", "Package Number", "Package Assigned Group", and "Package Assigned To". Below this is a "General Filters" section with two input fields: "Modified in Last x Days" and "Created in Last x Days", and a radio button group for "Include Closed?" with "Yes" and "No" options. At the bottom right, there are "Search" and "Cancel" buttons.

2. Complete the filter fields as described in the following table:

Field Name	Description
<b>Package Filters section</b>	
Package Workflow	Limits the list of packages to those with the workflow you specify
Package Number	Limits the list of packages to only the one with the package number 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

Field Name	Description
<b>General Filters section</b>	
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	Option to include closed packages in the list of packages

3. Click **Search**.

The packages that meet your filter criteria are listed.

4. Select the check boxes for the packages you want to add to the time sheet, and click **Add** to add them.

The time sheet with the added packages is displayed again.

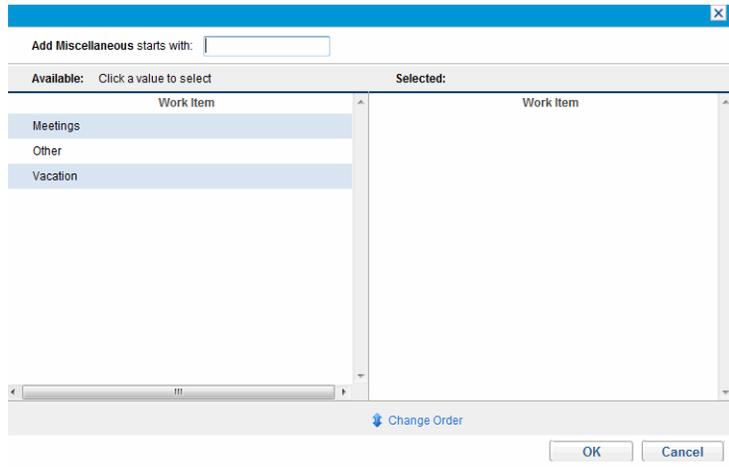
5. For more information about items you have added to the time sheet and to add other items, see [Adding Work Items to a Time Sheet](#) on page 32.

## 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 32](#).

## 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 88](#). For an example of a time sheet that has been opened, see [Figure 2-1 on page 25](#).
2. Select the check boxes 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 2-5* shows an example of the **Time Breakdown** tab, where some time is reported for particular work items on the time sheet. This tab is displayed by default.

Figure 2-5. Example time sheet, Time Breakdown tab

Joseph Banks - Time Sheet for 1/1/13 - 1/15/13 (Unsubmitted)

Resource: Joseph Banks      Time Period: 1/1/13 to 1/15/13      Time Sheet #: 1  
Description: Joseph Banks - 1/1/13 - 1/15/13      Status: Unsubmitted

Add Items ▼      Approvals/Transaction Details      Time Sheet Policies

Time Sheet Details (All times shown in hours)

Time Breakdown      \*Other Actuals      Additional Information      Group | Ungroup Items

Item	Activity	Expected Hours	Tue 1/1	Wed 1/2	Thu 1/3	Fri 1/4	Sat 1/5	Sun 1/6	Mon 1/7	Tue 1/8	Total
<input type="checkbox"/> Task: Development Complete (Analyst Resaerch)		8.0	2.00	1.00	1.00	2.00	0.00	0.00	0.00	0.00	6.00
<input type="checkbox"/> Task: Internal QA Complete (Analyst Resaerch)		8.0	0.00	2.00	1.00	0.00	1.00	1.00	0.00	0.00	5.00
<input type="checkbox"/> Misc: Meetings		0.0	1.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	4.00
<b>Line Actions:</b>			3.00	4.00	3.00	3.00	1.00	1.00	0.00	0.00	15.00

Line Details      Remove      Rework

Notes

[Add Notes](#)

In this example, you must use the horizontal scroll bar to see all the day-by-day details of time entry. The columns on the **Time Breakdown** tab in the **Time Sheet Details** section of the time sheet are described in *Table 2-4*. All columns except the columns to enter time are read-only. High-level information about this example is described after *Table 2-4*.

Table 2-4. Time Sheet Details, Time Breakdown tab columns (page 1 of 2)

Column Name	Description
Item	Names and other information about each item (work item). If items are grouped (see <a href="#">Table 2-2 on page 28</a> ), additional rows appear. For some work item types, the information displayed depends on whether items are grouped or ungrouped. See <a href="#">Organization of Time Sheet Lines on a Time Sheet on page 72</a> .
Status	(Displayed only if the time sheet has been submitted) Status of each item (time sheet line). For summary information about time sheet line statuses, see <a href="#">Summary of Time Sheet Line Statuses and Time Sheet Statuses on page 87</a> .
Activity	(Displayed only if your time sheet policy allows entry of activities) 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 <a href="#">Using Activities To Categorize Time To Be Tracked on page 14</a> .
Expected Hours or Expected Days	<p>(Displayed only if your time sheet policy allows display of expected time, that is, Expected Hours or Expected Days) Expected effort, based on the work item type, as follows:</p> <ul style="list-style-type: none"> <li>• For projects and tasks, your total Scheduled Effort on a task to which you are assigned.</li> <li>• For requests, your total Scheduled Effort as a resource on the request. If the request does not track resources but contains the Work Item field group, the Scheduled Effort in the Work Item Fields on the request. If the request does not contain the Work Item field group, the request's work allocation for the time sheet period.</li> <li>• For packages or miscellaneous work items, the associated work allocation.</li> </ul>

Table 2-4. Time Sheet Details, Time Breakdown tab columns (page 2 of 2)

Column Name	Description
[columns to enter time]	<p>Your entries of the actual time you worked on each item (row). As described later in this section, there is one column for the entire period or a column for each day of the period as in <a href="#">Figure 2-5 on page 67</a>, depending on the method you use to log time. (A horizontal scroll bar appears under these columns if needed to view columns that are not initially visible.)</p> <p>Totals for all items in a column appear in bold at the bottom of the column and are updated automatically when you update an actuals field in the column and then do any of the following:</p> <ul style="list-style-type: none"> <li>• Save (or save and submit) the time sheet</li> <li>• Add or remove a time sheet line</li> <li>• Save line details</li> <li>• Group or ungroup time sheet lines</li> </ul> <p><b>Note:</b> If you log time on a daily basis and if an administrator has set the <code>HIGHLIGHT_NONWORKING_DAYS_IN_TIMESHEET</code> <code>server.conf</code> parameter to <code>true</code>, the columns for non-working days and holidays (based on your regional calendar) are highlighted in color.</p>
Total	<p>Total number of actual hours or days entered (in the columns to the left) for each item (row). This field, as well as the grand total for the time sheet at the bottom of the column in bold, are updated automatically when you update an actuals field in the columns to the left and then do any of the following:</p> <ul style="list-style-type: none"> <li>• Save (or save and submit) the time sheet</li> <li>• Add or remove a time sheet line</li> <li>• Save line details</li> <li>• Group or ungroup time sheet lines</li> </ul>

In the example of [Figure 2-5 on page 67](#), the **Item**, **Expected Hours**, individual date, and **Total** columns indicate that the user, David Jones, is expected to spend 24 hours on the **Prototype new function** task in the **Whirlwind** project, and he did so on the first three workdays of the time period (8/2 through 8/4). He is expected to work 32 hours on the **Refine design** task, and he worked on it eight hours (on 8/5) during this time period. He was in meetings for two hours (on 8/6), spent 12 hours on the **Upgrade DB version** request as expected (on 8/6 and 8/9), and spent 34 hours on the **Enable EMEA users** request.

In general, managers can specify elsewhere the **Expected Hours** for tasks and requests on particular days covered by this or other time sheets. The relative values of **Expected Hours** and **Total** for any task or request do not indicate or determine whether the task or request has been completed.

All the tabs in the Time Sheet Details section show the same set of work items (rows) in the same order. The items are all either grouped or ungrouped, depending on the selected **Group | Ungroup Items** option. For more information, see *Organization of Time Sheet Lines on a Time Sheet on page 72*.

Each item has a check box to the left and entries for the columns described in *Table 2-4*. If items are grouped, their group names (headings) also have check boxes, and selecting the check box for a group name selects all of its subordinate work items.

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 one of the following:

- Weekly
- Biweekly (exactly two weeks)
- Semimonthly (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 2-5 on page 67*)
- Monthly

For each work item, 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 the work item each day (as in the example in *Figure 2-5 on page 67*). There is a column to enter time in hours for each day of the time period, and the number of columns depends on the period type (7 for weekly, 14 for biweekly, and so on). Use the horizontal scroll bar as needed to access all columns. You can specify partial hours to two decimal places, such as 8.25.
- By the total number of hours you worked on the work item over the entire time period. There is only one column to enter time in hours for the entire

time period. You can specify partial hours to two decimal places, such as 8.25.

- By the percentage of the entire time period you worked on the work item. There is only one column to enter a percentage of the entire time period for the 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 variable number of hours equal to the fixed number of hours per 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, assume the following:

- 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, where each workday is eight hours.
- 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.

- By the number of days you worked on the work item each day. There is a column to enter time in days for each day of the time period, and the number of columns depends on the period type (7 for weekly, 14 for biweekly, and so on). Use the horizontal scroll bar as needed to access all columns. You can specify partial days to three decimal places, such as 0.125, equivalent to one hour for an 8-hour day.
- By the total number of days you worked on the work item over the entire time period. There is only one column to enter time in days for the entire time period. You can specify partial days to three decimal places, such as 0.125, equivalent to one hour for an 8-hour day.

After updating the **Time Breakdown** tab, click **Save** to save the time sheet without submitting it, or click **Save & Submit** the time sheet to save and submit it. For information about submitting time sheets, see [Submitting a Time Sheet on page 84](#).

- ▶ For projects that are integrated with HP Time Management (see [Chapter 6, \*Integrating Time Management and Project Management\*, on page 147](#)), after users enter actual effort for tasks on the **Time Breakdown** tab, the time sheet update service (TM-PM Sync Service) sends updates of that actual effort to the project work plans for those tasks, as often as specified by the service (by default, every 3 hours). Providing these updates as a service improves the performance of HP Time Management. For information about configuring services, see the *System Administration Guide and Reference*. For information about projects, work plans, and tasks, see the *HP Project Management User's Guide*.

## Organization of Time Sheet Lines on a Time Sheet

All work items (time sheet lines) on a time sheet are either grouped or ungrouped, as explained in detail below.

At the top right of the **Time Sheet Details** section, you can click the available link in **Group | Ungroup Items** if you want to change the appearance of the time sheet to include or exclude groups for work items. The option you selected most recently has no link. Until you change the option, it applies to all your existing and new time sheets.

- ▶ If you type any amounts of time into time sheet lines on the **Time Breakdown** tab without saving the time sheet, and then you group or ungroup the time sheet lines, HP Time Management saves the time sheet automatically.

Grouped tasks, requests, and packages use two levels of organization, so changing the option from grouped to ungrouped or vice versa can change the order of the items on the time sheet, as described in the following sections.

- ▶ If the text for a field describing a work item is truncated in the display of the time sheet, you can hover your cursor over the truncated text to display the entire text for the field.

## Groups and the Order of Grouped Items

When items are grouped, the time sheet adds rows for headings (in bold) that group similar work items. No data can be entered in these heading rows, but each heading has a check box, and selecting it selects all of the subordinate work items.

The headings appear in the following order, with subordinate work items, as follows:

- Specific project names appear as headings for projects that track time at the project level. This set of headings is sorted alphabetically.

Under each project name heading, only one work item with one line of text appears. The information displayed is **Prj:** followed by the project name (presented as a summary task if you click it).

- Next, specific project names appear as headings for projects that track time at the summary task or task level. This set of headings is sorted alphabetically.

Under each project name heading, tasks for that project are listed, alphabetically by task name. The information displayed for each task is **Task:** followed by the task name, and below that, the project path in parentheses.

- Next, specific request types appear as headings for associated requests. This set of headings is sorted alphabetically.

Under each request type heading, requests of that type are listed, sorted by request number. The information displayed for each request is **Req:** followed by the request number, and below that, the request description in parentheses.

- Next, specific workflows appear as headings for packages that use them. This set of headings is sorted alphabetically.

Under each workflow heading, packages that use that workflow are listed, sorted by package number. The information displayed for each package is **Pkg:** followed by the package number, and below that, the associated workflow in parentheses.

- Finally, **Misc** - appears as the heading for all miscellaneous items, such as meetings and vacation.

Under the **Misc** - heading, miscellaneous items are sorted alphabetically. The information displayed for each miscellaneous item is **Misc:** followed by the item name.

As an example of a time sheet with grouped items, *Figure 2-5 on page 67* shows items in the following order:

- **Whirlwind** is a particular project that tracks time at the task level, and below it are two of its tasks.
- **PFM - Proposal** is a particular request type, and below it are specific requests of that type.
- **Misc** - includes the Meetings work item.

## Order of Ungrouped Items

When items are ungrouped, the time sheet is shorter and it is probably easier for you to use if you work on many different projects, tasks, requests, etc. The items are listed in the following order, without heading lines such as project names and request types:

- All projects that track time at the project level, alphabetized by project name.
- All tasks in projects that track time at the summary task or task level, listed alphabetically by task name. The information displayed for each task is **Task:** followed by the task name, and below that, the project path in parentheses.
- All requests, sorted by request number. The information displayed for each request is **Req:** followed by the request number, and below that, the request type in parentheses and the request description.
- All packages, sorted by package number. The information displayed for each package is **Pkg:** followed by the package number, and below that, the associated workflow in parentheses and the package description.
- All miscellaneous items, such as meetings and vacation, sorted alphabetically by item name. The information displayed for each miscellaneous item is **Misc:** followed by the item name.

As an example of a time sheet with ungrouped work items, see [Figure 2-2 on page 31](#) shows items in the following order:

- Two tasks in the **Whirlwind** project, which tracks time at the task level
- Two requests sorted by request number
- One miscellaneous work item

## Completing the Other Actuals Tab

[Figure 2-6](#) shows an example of the **Other Actuals** tab of the Edit Time Sheet page.

Figure 2-6. Example time sheet, Other Actuals tab

Joseph Banks - Time Sheet for 1/1/13 - 1/15/13 (Unsubmitted)

Save Save & Submit More

Resource: Joseph Banks Time Period: 1/1/13 to 1/15/13 Time Sheet #: 1  
 \*Description: Joseph Banks - 1/1/13 - 1/15/13 Status: Unsubmitted

Add Items ▼ Approvals/Transaction Details Time Sheet Policies

Time Sheet Details (All times shown in hours)

Time Breakdown \*Other Actuals Additional Information Group | Ungroup Items

Item	Activity	% Complete	Actual Effort	Hours Added	Item Status	Actual Start	Actual Finish
<input type="checkbox"/> Task: Development Complete (Analyst Resaerch)		40	16.00	0.00	Ready	1/1/13	
<input type="checkbox"/> Task: Internal QA Complete (Analyst Resaerch)		45	13.00	0.00	Ready	1/2/13	
<input type="checkbox"/> Misc: Meetings							

Line Actions:  
 Line Details Remove Rework

Notes  
 Add Notes

The **Item**, **Status**, and **Activity** columns on the left side of the time sheet are the same as when the **Time Breakdown** tab is selected. The **Status** column is present only if the time sheet has been submitted. The **Activity** column is present only if the system administrator has enabled entry of activities. For more information, see [Reporting Time on the Time Breakdown Tab on page 67](#).

To the right of these columns is a set of columns unique to the **Other Actuals** tab. (Scroll to the right if necessary to display additional columns.) These columns are used to display or specify fields for only the following:

- Tasks in projects for which a project manager has integrated HP Time Management and HP Project Management. Having fields in these columns on the time sheet’s **Other Actuals** tab to report “actuals” for tasks makes it unnecessary to access HP Project Management to report the same actuals. Which fields are visible in a column 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 104.
- Requests whose request types are configured to use HP Time Management to track actuals. For more information, see *Determining Who Can Log Time on Which Requests* on page 63.

The unique columns on the **Other Actuals** tab in the **Time Sheet Details** section of the time sheet are described in *Table 2-5*.

Table 2-5. Time Sheet Details, unique Other Actuals tab columns (page 1 of 2)

Columns Name	Description
% Complete	(Used only for tasks) Your personal <i>total</i> percentage contribution toward completing a task or request, for the cumulative time you have reported on time sheets. Contributions of others are excluded. If this field is required for any tasks on the time sheet, red asterisks are displayed next to this field for those tasks and next to the <b>Other Actuals</b> tab name.
Remaining Effort	(Used only for tasks, if this field is enabled for their project) Your personal remaining effort on a task, considering the cumulative time you have reported on time sheets. Contributions of others are excluded.

Table 2-5. Time Sheet Details, unique Other Actuals tab columns (page 2 of 2)

Columns Name	Description
Actual Effort	(Read-only. Used only for tasks and requests.) <i>Total</i> effort you have contributed to a task or request for the cumulative time you have reported or saved on time sheets. Contributions of others are excluded. The time sheet in <a href="#">Figure 2-5 on page 67</a> was saved, which caused the entries in its <b>Total</b> column on the <b>Time Breakdown</b> tab for each task and request to be added to any previous efforts from other time sheets, with the sums shown in this <b>Actual Effort</b> column on the <b>Other Actuals</b> tab.
Hours Added or Days Added	(Read-only. Used only for tasks and requests.) Time you have added to a task or request since you last opened or saved the time sheet. Values in this <b>Hours Added</b> column in <a href="#">Figure 2-6 on page 75</a> are all <b>0.00</b> because the time sheet in <a href="#">Figure 2-5 on page 67</a> was saved. Before it was saved, the values in this <b>Hours Added</b> column reflected time added to each task and request in the <b>Total</b> column on the <b>Time Breakdown</b> tab in <a href="#">Figure 2-5</a> since the time sheet was previously saved.
Item Status	(Read-only. Used only for tasks and requests.) Status of the item for which you are logging time.
Estimated Finish	(Used only for tasks, if this field is enabled for their project) Your personal estimated finish date for a task, considering the cumulative time you have reported on time sheets. Contributions of others are excluded.
Actual Start	(Read-only. Used only for tasks and requests.) Earliest date for which you entered time on any time sheet for the item.
Actual Finish	(Read-only. Used only for tasks and requests.) Latest date for which you entered time on any time sheet for your assignment on the item. <ul style="list-style-type: none"> <li>For tasks, a value is displayed only after you specify that your work on the task is 100% complete.</li> <li>For requests, the value is the date of your most recent contribution to the request.</li> </ul>

All the tabs in the Time Sheet Details section show the same set of work items (rows) in the same order. The items are all either grouped or ungrouped, depending on the selected **Group | Ungroup Items** option. For more information, see [Organization of Time Sheet Lines on a Time Sheet on page 72](#).

After updating the **Other Actuals** tab, click **Save** to save the time sheet without submitting it, or click **Save & Submit** the time sheet to save and submit it. For information about submitting time sheets, see [Submitting a Time Sheet on page 84](#).

## Displaying the Additional Information Tab

If your HP Time Management administrator has configured custom user 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 2-7](#) shows an example of the tab with three custom user data fields—**Cost Center**, **Business Unit**, and **Group**.

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

The **Item**, **Status**, and **Activity** columns on the left side of the time sheet are the same as when the **Time Breakdown** tab or **Other Actuals** tab is selected. The **Status** column is present only if the time sheet has been submitted. The **Activity** column is present only if the system administrator has enabled entry of activities. For more information, see [Reporting Time on the Time Breakdown Tab on page 67](#).

All the tabs in the Time Sheet Details section show the same set of work items (rows) in the same order. The items are all either grouped or ungrouped, depending on the selected **Group | Ungroup Items** option. For more information, see [Organization of Time Sheet Lines on a Time Sheet on page 72](#).

The user data fields in this tab are for display only. For information about editing the fields, see [User Data Tab on page 83](#).

Figure 2-7. Example time sheet, Additional Information tab

Joseph Banks - Time Sheet for 1/1/13 - 1/15/13 (Unsubmitted) Save Save & Submit More

---

Resource: Joseph Banks Time Period: 1/1/13 to 1/15/13 Time Sheet #: 1  
Description: Joseph Banks - 1/1/13 - 1/15/13 Status: Unsubmitted

Approvals/Transaction Details

---

Time Sheet Details (All times shown in hours)

Group | Ungroup Items

Item	Activity	Cost Center	Business Unit	Group
<input type="checkbox"/> Task: Development Complete (Analyst Research)				
<input type="checkbox"/> Task: Internal QA Complete (Analyst Research)				
<input type="checkbox"/> Misc: Meetings				

Line Actions:

---

Notes

After updating the **Additional Information** tab, click **Save** to save the time sheet without submitting it, or click **Save & Submit** the time sheet to save and submit it. For information about submitting time sheets, see [Submitting a Time Sheet](#) on page 84.

# Viewing and Specifying Time Sheet Line Details

Selecting exactly one time sheet line in the check boxes of the left-most column of a time sheet and clicking the **Line Details** button opens the Line 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. Above the tabs, the window shows the **Description** field and (if enabled for display) the **Expected Hours** or **Expected Days** field of the selected work item.



If you type any amounts of time into time sheet lines on the **Time Breakdown** tab without saving the time sheet, and then you save any line details, HP Time Management saves the time sheet automatically.

## Charge Codes/Activities (or Charge Codes) 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 2-8*. If the administrator has disabled entry of activities, the tab is named **Charge Codes** and shows only the section related to charge codes. Subsequent examples in this guide assume that activities are enabled.

Figure 2-8. Line Details, Charge Codes/Activities tab

The screenshot shows a window titled "Line Details" with a close button (X) in the top right corner. Below the title bar, the text "Description: Development Complete" and "Expected Hours: 8" is displayed. A tabbed interface is shown with four tabs: "Charge Codes/Activities", "Approvals/Transaction Details", "Notes", and "User Data". The "Charge Codes/Activities" tab is selected and active. Below the tabs, there is a text input field labeled "Activity Name". Underneath this field is a button labeled "Add Activities". Below the button is a table with three columns: "Charge Codes", "Description", and "Charge %". Below the table is another button labeled "Add Charge Codes". At the bottom right of the window, there are two buttons: "Save" and "Cancel".

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** (if present) 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 14.

➤ In your time sheet policy, for each of the work item types—projects, tasks, requests, packages, and miscellaneous items—administrators can prohibit, allow, or require you to specify activities. In addition, administrators can require you to enter activities, possibly from a subset of the enabled activities, for all requests that are based on particular request types.

➤ 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 **Save** on the Line 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 2-9*. 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 2-9. Line Details, Approvals/Transaction Details tab

The screenshot shows a window titled "Line Details" with a blue header bar and a close button. Below the header, the text "Description: Development Complete" and "Expected Hours: 8" is displayed. A tabbed interface contains four tabs: "Charge Codes/Activities", "Approvals/Transaction Details" (which is selected), "Notes", and "User Data". Under the "Approvals/Transaction Details" tab, the text "Work Item Line Approver: Project Managers" is shown. Below this is a table with two columns: "Time Sheet Line Approvers" and "Relationship".

Time Sheet Line Approvers	Relationship
Admin User	Member of Project Managers - Line level approver
Joseph Banks	Member of Project Managers - Line level approver

Below the table is a section titled "Time Sheet Line Transaction History" with a table structure. The table has three columns: "Date", "Full Name", and "Status". The table is currently empty. At the bottom right of the window are "Save" and "Cancel" buttons.

## Notes Tab

The **Notes** tab allows you to enter notes regarding the selected time sheet line. See [Figure 2-10](#).

Figure 2-10. Line Details, Notes tab

The screenshot shows the same "Line Details" window, but with the "Notes" tab selected. The "Description: Development Complete" and "Expected Hours: 8" information remains at the top. The "Notes" tab is active, showing a large, empty text area with a vertical scrollbar on the right side. The "Save" and "Cancel" buttons are visible at the bottom right of the window.

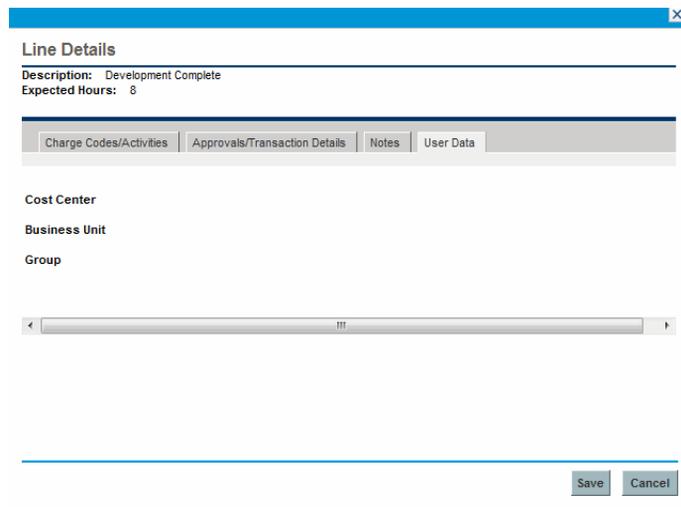
## User Data Tab

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 2-11*.

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 **Additional Information** tab of the time sheet (see *Displaying the Additional Information Tab* on page 78).

Figure 2-11. Line Details, User Data tab



The screenshot shows a software window titled "Line Details" with a close button in the top right corner. Below the title bar, the text "Line Details" is displayed. Underneath, there are two lines of information: "Description: Development Complete" and "Expected Hours: 8". A horizontal tabbed interface follows, with four tabs: "Charge Codes/Activities", "Approvals/Transaction Details", "Notes", and "User Data". The "User Data" tab is currently selected and active. Below the tabs, there are three labels: "Cost Center", "Business Unit", and "Group". A horizontal scrollbar is visible below these labels. At the bottom right of the window, there are two buttons: "Save" and "Cancel".

# Submitting a Time Sheet

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

1. Search for and open the desired time sheet if it is not already open. See *Searching Time Sheets* on page 88.
2. On the Edit Time Sheet page, click **Save & 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.



Depending on the system configuration, if the time sheet has lines with no time entered (“empty” lines), you might be asked or required to delete those lines or provide data for them before the time sheet is submitted.

Joseph Banks - Time Sheet for 1/1/13 - 1/15/13 (Pending Approval) Save Done More

Resource: Joseph Banks Time Period: 1/1/13 to 1/15/13 Time Sheet #: 1  
Description: Joseph Banks - 1/1/13 - 1/15/13 Status: Pending Approval

Add Items ▾ Approvals/Transaction Details Time Sheet Policies

Time Sheet Details (All times shown in hours)

Item	Status	Activity	Expected Hours	Group   Ungroup Items							Total
				Tue 1/1	Wed 1/2	Thu 1/3	Fri 1/4	Sat 1/5	Sun 1/6		
<input type="checkbox"/> Task: Development Complete (Analyst Resaerch)	Submitted		8.0	2.00	1.00	1.00	2.00	0.00	0.00	6.00	
<input type="checkbox"/> Task: Internal QA Complete (Analyst Resaerch)	Submitted		8.0	0.00	2.00	1.00	0.00	1.00	1.00	5.00	
<input type="checkbox"/> Misc: Meetings	Submitted		0.0	1.00	1.00	1.00	1.00	0.00	0.00	4.00	
<b>Line Actions:</b>				3.00	4.00	3.00	3.00	1.00	1.00	15.00	

Line Details Remove Rework Approve Reject

Notes + Add Notes

## Time Approvals and Transaction Details

Clicking the **Approvals/Transaction Details** link 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 status. See *Figure 2-12* and *Table 2-6*.

Figure 2-12. Time Sheet Details - Approval Details/Transaction History

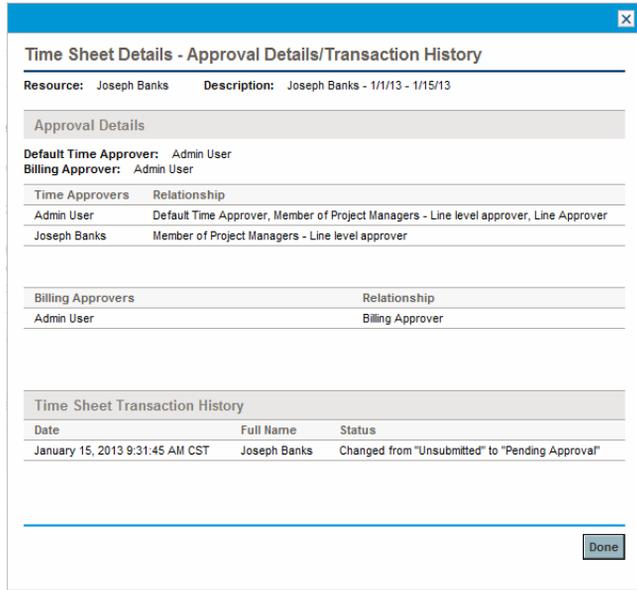


Table 2-6. Time Sheet Details - Approval Details/Transaction History fields (page 1 of 2)

Field or Column Name	Description
Resource	Person for whom the time sheet was created. See <a href="#">Creating a Time Sheet on page 22</a> .
Description	Description of the time sheet. See <a href="#">Creating a Time Sheet on page 22</a> .
<b>Approval Details section</b>	
Default Time Approver	Person or security group who can view the resource's time sheets to help guide the resource through the approval process and resolve issues as may be required. The default time approver is usually given the access grant needed to approve the resource's time sheets.

Table 2-6. Time Sheet Details - Approval Details/Transaction History fields  
(page 2 of 2)

Field or Column Name	Description
Billing Approver	People or security group who can freeze or close the time sheet.
Time Approvers <i>and</i> Relationship	All the time approvers associated with the lines of this time sheet, and each one's relationship to the specified <b>Resource</b> (for example, a particular user, a delegate, or a member of a particular security group).
Billing Approvers <i>and</i> Relationship	All the billing approvers associated with the lines of this time sheet, and each one's relationship to the specified <b>Resource</b> (for example, a particular user, a delegate, or a member of a particular security group).
<b>Time Sheet Transaction History section</b>	
Date	Date the time sheet status changed.
Full Name	Full name of the person who made the change.
Status	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 2-7* summarizes the possible combinations of the statuses of the lines on a time sheet, the status of the time sheet as a whole, and the conditions that cause the statuses. Remember that a time sheet can have different approvers for its lines, and a line can have more than one approver.

Table 2-7. Time sheet line statuses and time sheet statuses (page 1 of 2)

Statuses of the Lines on a Time Sheet	Status of the Time Sheet	Conditions that Cause the Statuses
All lines are Unsubmitted.	Unsubmitted	User has never submitted the time sheet (or, after submitting it, user initiated rework of all of its lines and possibly added lines to it, or approvers rejected all of its lines, or a combination of both).
All lines are Submitted.	Pending Approval	User submitted (or resubmitted) the time sheet. Approvers have not approved or rejected any lines.
All lines are Approved.	Approved	Approvers approved all the time sheet lines.
One or more lines, but not all lines, are Submitted. All other lines are Approved.	Pending Approval	Approvers approved some lines, but not all lines, and have not rejected any lines.
One or more lines are Rejected.	In Rework	Approvers rejected the lines that are in Rejected status.
One or more lines, but not all lines, are Unsubmitted.	In Rework	Approvers rejected at least one line that user is reworking, or user initiated rework on or added at least one line. Lines being reworked and lines that have just been added to any time sheet are Unsubmitted.

Table 2-7. Time sheet line statuses and time sheet statuses (page 2 of 2)

Statues of the Lines on a Time Sheet	Status of the Time Sheet	Conditions that Cause the Statues
All lines are Cancelled.	Cancelled	User cancelled the time sheet (and thus all of its lines).
All lines are Frozen.	Frozen	Billing approver froze the time sheet (and thus all of its lines).
All lines are Closed.	Closed	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 conditions:

- You created the time sheet (or someone created it for you).
- You are the manager of the resource for the time sheet.
- You are the delegate of the resource for the time sheet.
- 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.

- From the menu bar, select **Search > Time Sheets**.

The Search Time Sheets page appears.

Search Time Sheets

Search for a Time Sheet to View

Find Time Sheets By:

Period Type:

Previous Time Periods to Show:

Description Includes:

Resource:

Org Unit:

Time Sheet Status:

Include Frozen and Closed Time Sheets?  Yes  No

Sort By:   Ascending  Descending

\*Results Displayed Per Page:  \*Max Rows:

- 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)	<p>When selected, limits the search to time sheets having the period type selected from the drop-down list. Depending on your system configuration, the list can include the following:</p> <ul style="list-style-type: none"> <li><b>Weekly</b> (every week, starting by default on a Monday)</li> <li><b>Bi-Weekly</b> (every two weeks, starting by default on a Monday; for example, <b>8/29/10 - 9/11/10</b> is a biweekly time period in August and September 2010)</li> <li><b>Semi-Monthly</b> (twice a month, where the first time period always ends on the 15th of the month; for example, the two semimonthly time periods of September 2010 are <b>9/1/10 - 9/15/10</b> and <b>9/16/10 - 9/30/10</b>)</li> <li><b>Monthly</b> (every full calendar month)</li> </ul>
Time Period	Enabled when <b>Period Type</b> is selected and a value is chosen for it. Limits the search to a particular time period you select 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 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.
Time Sheet Status	<p>Limits the search to time sheets having the statuses you specify. The possible time sheet statuses are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Unsubmitted</b></li> <li>• <b>Pending Approval</b></li> <li>• <b>In Rework</b></li> <li>• <b>Approved</b></li> <li>• <b>Cancelled</b></li> <li>• <b>Frozen</b></li> <li>• <b>Closed</b></li> </ul> <p>For more information, see <a href="#">Summary of Time Sheet Line Statuses and Time Sheet Statuses on page 87</a>.</p>
Include Frozen and Closed Time Sheets	Option 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.

Field Name (*Required)	Description
<b>Sort criteria</b>	
Sort By	<p>Parameter (column in the search results) to use to sort the search results. The options are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Resource.</b> The resource the time sheet is for.</li> <li>• <b>Time Period - Time Sheet #.</b> The time period of the time sheet followed by its number.</li> <li>• <b>Manager.</b> The manager of the <b>Resource.</b></li> <li>• <b>Status.</b> The time sheet status.</li> <li>• <b>Description.</b> The time sheet description. By default, this is the <b>Resource</b>, followed by a hyphen (-), followed by the <b>Time Period.</b></li> </ul>
Ascending <i>or</i> Descending	Displays the results in ascending or descending order.
*Results Displayed Per Page	Maximum number of results to be displayed per page.
*Max Rows	Maximum number of rows to display for all pages.

#### 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. Clicking **Modify Search** button in the upper right corner, you go back to the Search Time Sheets page, where you can modify your search criteria.

Search Time Sheets

[Export to Excel](#) [Modify Search](#)

Select a Time Sheet to View Showing 1 to 5 of 5

Resource	Time Period - Time Sheet #	Manager	Status	Description
Joseph Banks	12/1/12 - 12/15/12 - 1		Unsubmitted	Joseph Banks - 12/1/12 - 12/15/12
Joseph Banks	1/1/13 - 1/15/13 - 1		Pending Approval	Joseph Banks - 1/1/13 - 1/15/13
Joseph Banks	1/16/13 - 1/31/13 - 1		Unsubmitted	Joseph Banks - 1/16/13 - 1/31/13
Joseph Banks	2/1/13 - 2/15/13 - 1		Unsubmitted	Joseph Banks - 2/1/13 - 2/15/13
Joseph Banks	2/16/13 - 2/28/13 - 1		Pending Approval	Joseph Banks - 2/16/13 - 2/28/13

Showing 1 to 5 of 5

#### 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 25.

## Editing a Time Sheet

To edit a time sheet:

1. Search for and open the desired time sheet. See *Searching Time Sheets* on page 88.
2. On the Edit Time Sheet page, edit the time sheet as desired and click **Save**. For information about the time sheet fields, see *Time Sheets and Time Sheet Lines* on page 25.



Delegates can edit time sheets. See *Delegation* on page 108.

# 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. See *Reworking Lines on a Submitted Time Sheet*.

If a submitted time sheet has any lines that have been neither approved nor rejected yet (that is, their status remains Submitted), you can do the following:

- Initiate correction (“rework”) of those lines. See *Reworking Lines on a Submitted Time Sheet*.
- Add new lines to the time sheet. See *Adding Lines to a Submitted Time Sheet* on page 94.

After you make your corrections or additions, you will need to resubmit the time sheet.

## Reworking Lines on a Submitted 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 88.
2. On the Edit Time Sheet page, select the check boxes 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, update each reworked time sheet line as appropriate in terms of time worked. Also, for each line, click **Line Details**, and complete the line details as appropriate (see *Viewing and Specifying Time Sheet Line Details* on page 80).
5. Click **Save** to save the time sheet or click **Save & Submit** to save and resubmit the time sheet.

## Adding Lines to a Submitted 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 88*.
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 32*.

The status of the new time sheet lines 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 lines.
4. Click **Save** to save the time sheet or click **Save & Submit** to save and resubmit the time sheet.

## 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 88*.
2. On the Edit Time Sheet page, click the **Copy Time Sheet** button.

The Copy Time Sheet page appears.

**Copy Time Sheet**

A Time Sheet for this Time Period and Resource already exists. Duplicate Time Sheets are not allowed. Please choose another Time Period or Resource. [Open Time Sheet](#)

•Time Period: 1/1/13 - 1/15/13  
•Resource: Joseph Banks  
•Description: Joseph Banks - 1/1/13 - 1/15/13

**Include in Copy**

Please note that current business rules may not allow some of the existing items on the new time sheet. These items will not be copied to the new time sheet.

Include the following data on the new time sheet:

Include Closed Items  
 Include Notes  
 Include Disabled Activities

Copy Cancel

If your time sheet policy allows you to have only one time sheet in a time period, a warning is displayed advising you to change the **Time Period** or **Resource** fields.

3. Change the **Time Period** or **Resource** as needed.
4. By default, all work items for which you are still allowed to log time, as well as miscellaneous items, are copied to the new time sheet, along with their activities and user data. If you want to include closed work items from the original time sheet in the new time sheet, select the **Include Closed Items** check box. Closed work items are the following:
  - Requests that are closed
  - Tasks that are complete and whose projects still allow time to be logged
  - Packages that are closed



If you are not allowed access to a work item assigned to the **Resource** you specify, that item will be excluded from the copy.

5. If you want to copy the time sheet Notes (see *Time Sheets and Time Sheet Lines on page 25*) and time sheet line Notes (see *Notes Tab on page 82*) from the original time sheet to the new time sheet, select the **Include Notes** check box.
6. If you want to copy the disabled activities from the original time sheet to the new time sheet, select the **Include Disabled Activities** check box. By default, this check box is selected.

If you do not want to copy the disabled activities, deselect the check box.

7. 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.

8. On the Edit Time Sheet page, edit the time sheet as desired and click **Save**. For information about the time sheet fields, see *Time Sheets and Time Sheet Lines on page 25*.

## 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 88](#).
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** button in the upper-right corner of the page 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.

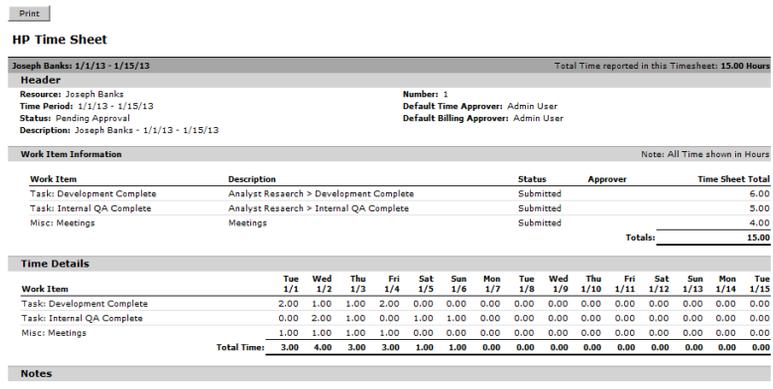


You must save the data you have entered on the time sheet for it to appear in the printable version. You can print an unsubmitted or a submitted time sheet.

To print a time sheet:

1. Search for and open the desired time sheet. See [Searching Time Sheets on page 88](#).
2. On the Edit Time Sheet page, click **Printable Version**.

A printable version of the time sheet appears. The work items are listed alphabetically by work item type—first all miscellaneous items, then all packages, then all projects, then all requests, and finally all tasks—and alphabetically within each work item type.



The screenshot displays a printable time sheet for Joseph Banks covering the period 1/1/13 to 1/15/13. The total time reported is 15.00 hours. The work items listed are: Development Complete (6.00 hours), Internal QA Complete (5.00 hours), and Meetings (4.00 hours). The time details section shows a breakdown of hours by day of the week for each work item.

HP Time Sheet		Total Time reported in this Timesheet: 15.00 Hours														
Header																
Resource: Joseph Banks								Number: 1								
Time Period: 1/1/13 - 1/15/13								Default Time Approver: Admin User								
Status: Pending Approval								Default Billing Approver: Admin User								
Description: Joseph Banks - 1/1/13 - 1/15/13																
Work Item Information																Note: All Time shown in Hours
Work Item	Description	Status	Approver	Time Sheet Total												
Task: Development Complete	Analyst Resaerch > Development Complete	Submitted		6.00												
Task: Internal QA Complete	Analyst Resaerch > Internal QA Complete	Submitted		5.00												
Misc: Meetings	Meetings	Submitted		4.00												
				<b>Totals:</b>	<b>15.00</b>											
Time Details																
Work Item	Tue 1/1	Wed 1/2	Thu 1/3	Fri 1/4	Sat 1/5	Sun 1/6	Mon 1/7	Tue 1/8	Wed 1/9	Thu 1/10	Fri 1/11	Sat 1/12	Sun 1/13	Mon 1/14	Tue 1/15	
Task: Development Complete	2.00	1.00	1.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Task: Internal QA Complete	0.00	2.00	1.00	0.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Misc: Meetings	1.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Total Time:</b>	<b>3.00</b>	<b>4.00</b>	<b>3.00</b>	<b>3.00</b>	<b>1.00</b>	<b>1.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
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**.

The printer selection dialog for your computer 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** button in the upper-right corner 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 2-13](#) and [Figure 2-14](#).

Figure 2-13. Time Sheet Audit Trail (first) window

Time Sheet Audit Trail

Export to Excel

Time Sheet Audit Trail Showing 1 to 7 of 9

Date	User	Context	Event
Jan 15, 2013 9:31:45 AM	Banks, Joseph	Joseph Banks - 1/1/13 - 1/15/13	Status Changed from "Unsubmitted" to "Pending Approval"
Jan 15, 2013 9:31:45 AM	Banks, Joseph	Meetings	Status Changed from "Unsubmitted" to "Submitted"
Jan 15, 2013 9:31:45 AM	Banks, Joseph	Development Complete	Status Changed from "Unsubmitted" to "Submitted"
Jan 15, 2013 9:31:45 AM	Banks, Joseph	Internal QA Complete	Status Changed from "Unsubmitted" to "Submitted"
Jan 14, 2013 4:23:50 PM	Banks, Joseph	Meetings	Added line "Meetings"
Jan 14, 2013 4:23:02 PM	Banks, Joseph	Development Complete	Added line "Development Complete"
Jan 14, 2013 4:22:01 PM	Banks, Joseph	Internal QA Complete	Added line "Internal QA Complete"

Showing 1 to 7 of 9

Figure 2-14. Time Sheet Audit Trail (second) window

Time Sheet Audit Trail

Export to Excel

Time Sheet Audit Trail Showing 8 to 9 of 9

Date	User	Context	Event
Jan 14, 2013 3:04:21 PM	Banks, Joseph	30034	Added line "30034"
Jan 14, 2013 2:48:20 PM	Banks, Joseph	Joseph Banks - 1/1/13 - 1/15/13	Added time sheet "Joseph Banks - 1/1/13 - 1/15/13"

Showing 8 to 9 of 9

The fields (columns) are described in *Table 2-8*.

Table 2-8. Time Sheet Audit Trail columns

Column 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.

In the example of *Figure 2-13* and *Figure 2-14*, the time sheet was created, lines were added to it, and when the time sheet was submitted, the status of each of its five lines changed from Unsubmitted to Submitted and the status of the time sheet changed from Unsubmitted to Pending Approval.

# 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 rules of a time sheet policy control the following:

- Which reporting period type (weekly, biweekly, semimonthly, or monthly) is used to log time
- Which of the following methods you use to enter time for each work item:
  - In units of hours, day by day over the time period
  - In units of hours for the entire time period
  - As a percentage of the entire time period
  - In units of days, day by day over the time period
  - In units of days for the entire 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 you are allowed to submit time sheets that have empty lines (lines in which all values are 0)
- 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
- Maximum and minimum amounts of time allowed per day and per time sheet, and consequences of violations
- Default set of charge codes you can assign to time sheet lines

- Specific work item types (projects, tasks, requests, packages, and/or miscellaneous items) for which you are allowed to log time
- Whether you are allowed to specify activities for any work items on time sheets, and if so, the work item types for which you must specify activities

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, a warning such as the one shown in *Figure 2-15* might be displayed when you create a time sheet.

Figure 2-15. Create Time Sheet page that has a warning

The screenshot shows the 'Create Time Sheet' page. At the top, there is a warning message in a yellow box: 'A Time Sheet for this Time Period and Resource already exists. Duplicate Time Sheets are not allowed. Please choose another Time Period or Resource. [Open Time Sheet](#)'. Below the warning, there are three fields: 'Time Period' with a dropdown menu showing '1/1/13 - 1/15/13', 'Resource' with a dropdown menu showing 'Joseph Banks', and 'Description' with a text input field containing 'Joseph Banks - 1/1/13 - 1/15/13'. A 'Create' button is located at the bottom right of the form.

As another example, if you do not adhere to the minimum or maximum hours for a time sheet, a warning might be displayed when you submit the time sheet for approval. For example, the warning in *Figure 2-16* indicates that you have submitted a time sheet with too many hours, based on the time sheet policy assigned to you.

Figure 2-16. Time Sheet Policy Warnings

The screenshot shows a 'Warnings' dialog box with a blue header and a close button (X) in the top right corner. The main text reads: 'The following warnings will not prevent you from submitting your time sheet, but you should consider addressing them before submitting the time sheet. Click **Submit** to submit your time sheet without correcting it. Click **Cancel** to correct your time sheet.' Below this, there is a warning icon (triangle with exclamation mark) and the text: 'Maximum time You have entered more than the recommended number of hours on this time sheet. Your time sheet contains 75 hours, but you should enter a maximum of 20.0 hours.' At the bottom of the dialog, there is a link: 'Open list of warnings in new window' and two buttons: 'Submit' and 'Cancel'.

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 view 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 tasks that meet all of the following conditions:

- They are assigned to you.
- Their parent task is in Active status.
- By default, they are ready for your action and work is expected on them, that is, their status is Ready or In Progress. You can optionally display tasks with only one of these statuses. In addition, if you deselect the portlet preference **Only show Tasks ready for my action**, the status could be Pending Predecessor. Tasks that are completed cannot be displayed.
- 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 within 14 days before or after the current date. No default preference is provided for their scheduled finish date.)

Individual tasks in a parent project are often organized under one or more higher levels of summary tasks, which in turn are organized under the project. The manager of a project specifies the level at which users can log time on time sheets for that project’s tasks—at the level of the individual tasks, at a particular summary-task level, or at the project level.



The My Tasks portlet displays tasks at the individual task level. If the project is configured to track time at a higher level in the work plan hierarchy, the portlet also displays the appropriate summary task for which the user can log time.

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 view in the time sheet interface.

See the example in *Figure 2-17*. For introductory information, see *Using the My Tasks Portlet and Project Integration* on page 16.

Figure 2-17. My Tasks portlet

Actual Start	Actual Finish	Actual Effort (hrs)	% Complete
<b>Requirements Validated</b> Task is In Progress; Scheduled: 8/13/12 - 8/16/12 (4 days) ⚠ Whirlwind project			
8/13/12		50.00	30

Note the correlation of the data for **Actual Effort (hrs)** and **% Complete** on the **Refine design** task to the time sheet data for the task in *Figure 2-6* on page 75. The **Prototype new function** task shown on the time sheet does not appear in the My Tasks portlet because the project manager has specified status for that task as Complete.

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 2-17 on page 103](#)). 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, note the following:

- 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 the value in the **Actual Effort (hrs)** column for any particular task (see [Figure 2-17 on page 103](#)) to display and update the Effort Breakdown window for the selected time sheet (see the example in [Figure 2-18](#)). 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 2-18. Effort Breakdown window

Task / Activity	Hours in all Time Sheets	Hours this Time Sheet	Hours Added	Mon 8/13	Tue 8/14	Wed 8/15	Thu 8/16	Fri 8/17
Task: Requirements Validated (Windwind project)	50.00	27.00	0.00	4.00	5.00	5.00	5.00	5.00
Hours on other work items:		29.00		4.00	6.00	7.00	7.00	5.00
<b>Total Hours:</b>	<b>56.00</b>	<b>0.00</b>		<b>8.00</b>	<b>11.00</b>	<b>12.00</b>	<b>12.00</b>	<b>10.00</b>

- In the My Tasks portlet, if you select a new time sheet from the **Use Time Sheet** field and click **Edit Effort Breakdown** or any value in the **Actual Effort (hrs)** column, the new time sheet is automatically created and the Effort Breakdown window opens.
- If you open the Effort Breakdown window from the My Tasks portlet, enter actuals and click **Save**, the actuals are saved to the database immediately.
- 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 **Other Actuals** tab.
- If you have an HP Time Management license, you must enter actuals using time sheets or the My Tasks portlet, not the project 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 projects, tasks, requests, packages, and miscellaneous items (depending on configuration).

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 147.



# 3 Reviewing and Approving Time

## 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 19.

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 saved and submitted).

Only people who are identified as time approvers (or their delegates) and who also 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.

Whenever multiple approvers can approve submitted time (for example, when the resource's time approver is a resource group, or when a delegator and the associated delegate can approve a resource's time), only one of the approvers needs to approve or reject the submitted time.

For information about viewing all approvers and the transaction history for a time sheet, see [Time Approvals and Transaction Details on page 84](#).

## Delegation

HP Time Management has the concept of delegation, where one person, the delegator, temporarily assigns his or her own 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 do the following 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 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.

After a delegate is specified, the delegator can still perform all the same actions as the delegate.

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 88](#).

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 the following interfaces:

- The Approve Time page (see [Approving or Rejecting Time Using the Approve Time Page on page 110](#)).
- The Approve Time Sheets portlet (see [Approving or Rejecting Time Using the Approve Time Sheets Portlet on page 117](#)).
- The **Project Summary** tab in a project's Project Overview page (see [Approving or Rejecting Time from the Project Overview Page on page 119](#)). This tab displays only the time sheets that include tasks from that project.

All of these interfaces behave as follows:

- You initially view 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 particular time sheet lines that you are authorized to approve.
- If you open a time sheet in the list, the following occur:
  - 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.



If you reject time that a resource submitted for a project, a task, or a request, those actuals in the work plan or request are automatically reduced by the amount of time you rejected. The time sheet continues to reflect all the time the user has entered, including rejected time.

## 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 **Open > Time Management > Time Sheets > Approve Time.**

The Approve Time page appears.

**Approve Time**

Search for Time to Approve

Period Type: Bi-Weekly   
 Time Period: 3/19/12 - 4/1/12   
 Previous Time Periods to Show: 1 More Time Periods

Resource:    
 Manager:    
 Org Unit:    
 Time Sheet Line Status: Submitted

Show Time Sheets: Both with and without Exceptions   
 Total Hours Equal or Exceed:    
 Total Hours Equal or Less Than:    
 Projects:

Sort By:    
 Ascending   
 Descending

\*Results Displayed Per Page: 50   
 \*Max Rows: 500

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
<b>Search criteria</b>	
Period Type (option includes a drop-down list)	<p>When selected, limits the search to time sheets that have the period type you select, which you must base on your system configuration:</p> <ul style="list-style-type: none"> <li>• <b>Weekly</b> (every week, starting by default on a Monday)</li> <li>• <b>Bi-Weekly</b> (every two weeks, starting by default on a Monday; for example , <b>8/29/10 - 9/11/10</b> is a biweekly time period in August and September 2010)</li> <li>• <b>Semi-Monthly</b> (twice a month, where the first time period always ends on the 15th of the month; for example, the two semimonthly time periods of September 2010 are <b>9/1/10 - 9/15/10</b> and <b>9/16/10 - 9/30/10</b>)</li> <li>• <b>Monthly</b> (every full calendar month)</li> </ul>
Time Period	Enabled when <b>Period Type</b> 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 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.

Field Name (*Required)	Description
Time Sheet Line Status	<p>Limits the search to time sheets having lines with the statuses you specify. The possible time sheet line statuses are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Submitted</b> (the default)</li> <li>• <b>Approved</b></li> <li>• <b>Rejected</b></li> </ul> <p>For more information, see <a href="#">Summary of Time Sheet Line Statuses and Time Sheet Statuses on page 87</a>.</p>
Show Time Sheets	<p>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 the allowed maximum time per day or minimum or maximum time per time sheet.</p>
Total Hours Equal or Exceed	<p>Limits the search to time sheets on which the total hours equal or exceed the number you specify.</p>
Total Hours Equal or Less Than	<p>Limits the search to time sheets on which the total hours are equal to or less than the number you specify.</p>
Projects	<p>Limits the search to time associated with the projects you specify.</p>

Field Name (*Required)	Description
<b>Sort criteria</b>	
Sort By	<p>Parameter (column in the search results) to use to sort the search results. The options are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Resource.</b></li> <li>• <b>Time Period - Time Sheet #.</b> Links to the time sheets having the time period and time sheet number (a unique combination).</li> <li>• <b>Manager.</b> The manager of the <b>Resource.</b></li> <li>• <b>Status.</b> The <b>Time Sheet Line Status</b> as specified in the search criteria.</li> <li>• <b>Time to Approve.</b> For each time sheet, the amount of time, of the specified <b>Status</b>, that you can approve.</li> <li>• <b>Total Time.</b> The total time on the time sheet, regardless of the search criteria or who its approvers are.</li> <li>• <b>Approvable Line Costs.</b> The costs associated with the <b>Time to Approve.</b></li> </ul>
Ascending <i>or</i> Descending	Displays the results in ascending or descending order.
*Results Displayed Per Page	Maximum number of results to be displayed per page.
*Max Rows	Maximum number of rows to display for all pages.

#### 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. For each resource, time is expressed in units of hours or days based on that user's time sheet policy for entering time.

The screenshot shows the 'Approve Time' interface. At the top, there is a table titled 'Select Time to Approve' with one row of data. Below the table is a search section titled 'Search for Time to Approve' with various filters and a search button.

	Resource	Time Period - Time Sheet #	Manager	Status	Time to Approve	Total Time	Approvable Line Costs
<input type="checkbox"/>	Joseph Banks	1/1/13 - 1/15/13 - 1		Submitted	11 (Hours)	15 (Hours)	\$0.00

Search filters include: Period Type (Bi-Weekly), Time Period (8/20/12 - 9/2/12), Previous Time Periods to Show (1), Show Time Sheets (Both with and without Exceptions), Total Hours Equal or Exceed, Total Hours Equal or Less Than, and Projects. Sort By is set to Resource, and Results Displayed Per Page is 50.

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

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

To view cost data in the **Approvable Line Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant. This cost data is the total cost that you can approve on that time sheet.

**Total Time** on a time sheet can be more than **Time to Approve** if you are not an approver for some of the lines on the time sheet.

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, go to [step 6](#).

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

- a. Select check boxes 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, go to [step 5 on page 114](#).

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.

Joseph Banks - Time Sheet for 1/1/13 - 1/15/13 (Pending Approval) Save Done More

Resource: Joseph Banks Time Period: 1/1/13 to 1/15/13 Time Sheet #: 1  
\*Description: Joseph Banks - 1/1/13 - 1/15/13 Status: Pending Approval

Add Items Approvals/Transaction Details Time Sheet Policies

Time Sheet Details (All times shown in hours)

Time Breakdown		Other Actuals		Additional Information		Group   Ungroup Items					
Item	Status	Activity	Expected Hours	Tue 1/1	Wed 1/2	Thu 1/3	Fri 1/4	Sat 1/5	Sun 1/6	Total	
<input type="checkbox"/> Analyst Resaerch Project: 30917											
<input type="checkbox"/> Task: Development Complete (Analyst Resaerch)	Submitted		8.0	2.00	1.00	1.00	2.00	0.00	0.00	6.00	
<input type="checkbox"/> Task: Internal QA Complete (Analyst Resaerch)	Submitted		8.0	0.00	2.00	1.00	0.00	1.00	1.00	5.00	
Misc -											
<input type="checkbox"/> Misc: Meetings	Submitted		0.0	1.00	1.00	1.00	1.00	0.00	0.00	4.00	
<b>Line Actions:</b>				3.00	4.00	3.00	3.00	1.00	1.00	15.00	
Line Details Remove Rework Approve Reject											

Notes  
Add Notes

- b. All time sheet lines on a time sheet are either grouped or ungrouped. At the top right of the **Time Sheet Details** section, you can click the available link in **Group | Ungroup Items** if you want to change the appearance of the time sheet to include or exclude groups for work items. The option you selected most recently has no link. Your display preference applies to all existing and new time sheets you access.

If time is reported on a daily basis, use the horizontal scroll bar as needed to view details of reported time for each day.

For information about the organization of time sheet lines when they are grouped or ungrouped, see *Organization of Time Sheet Lines on a Time Sheet* on page 72.



You can review details for or add notes to any particular time sheet line. See *Viewing and Specifying Time Sheet Line Details* on page 80.

- c. Select the desired check boxes for particular time sheet lines in the time sheet.

If items are grouped, their group names (headings) also have check boxes, and selecting the check box for a group name selects all of its subordinate work items.

- d. 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.

If you reject any lines on the time sheet, the time sheet status becomes In Rework.

**Resource:** Joseph Banks      **Time Period:** 1/1/13 to 1/15/13      **Time Sheet #:** 1  
**Description:** Joseph Banks - 1/1/13 - 1/15/13      **Status:** Approved  
[Approvals/Transaction Details](#)      [Time Sheet Policies](#)

**Time Sheet Details** (All times shown in hours)

Time Breakdown     Other Actuals     Additional Information    **Group | Ungroup Items**

Item	Status	Activity	Expected Hours	Tue 1/1	Wed 1/2	Thu 1/3	Fri 1/4	Sat 1/5	Sun 1/6	Total
<input type="checkbox"/> Analyst Resaerch Project: 30917										
<input type="checkbox"/> Task: Development Complete (Analyst Resaerch)	Approved		8.0	2.00	1.00	1.00	2.00	0.00	0.00	6.00
<input type="checkbox"/> Task: Internal QA Complete (Analyst Resaerch)	Approved		8.0	0.00	2.00	1.00	0.00	1.00	1.00	5.00
<input type="checkbox"/> Misc -										
<input type="checkbox"/> Misc: Meetings	Approved		0.0	1.00	1.00	1.00	1.00	0.00	0.00	4.00
<b>Line Actions:</b>				<b>3.00</b>	<b>4.00</b>	<b>3.00</b>	<b>3.00</b>	<b>1.00</b>	<b>1.00</b>	<b>15.00</b>

**Notes**

## 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 110).

Figure 3-1. Approve Time Sheets portlet

Resource	Time Period - Time Sheet #	Status	Manager	Time to Approve	Total Time	Approvable Line Costs
<input type="checkbox"/> Andy Madison	1-8-12 - 15-8-12 - 1	Submitted	Kim Song	6 (Hours)	85 (Hours)	USD 570.00
<input type="checkbox"/> Cindy Ruth	1-8-12 - 15-8-12 - 1	Submitted	Kim Song	6 (Hours)	42 (Hours)	USD 570.00

Showing 3 to 4 of 6

To view cost data in the **Approvable Line Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant. This cost data is the total cost that you can approve on that time sheet.

**Total Time** on a time sheet can be more than **Time to Approve** if you are not an approver for some of the lines on the time sheet.

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 portlet filter criteria for the list of time sheets to approve, click the **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 111](#)), 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, go to [step 5](#).

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

- a. Select check boxes for the time sheets of interest (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, go to [step 4 on page 118](#).

To approve or reject particular time sheet lines:

- a. Open the time sheet by clicking its link in the **Time Period - Time Sheet - #** column.
- b. All time sheet lines on a time sheet are either grouped or ungrouped. At the top right of the **Time Sheet Details** section, you can click the available link in **Group | Ungroup Items** if you want to change the appearance of the time sheet to include or exclude groups for work items. The option you selected most recently has no link. Your display preference applies to all existing and new time sheets you access.

For information about the organization of time sheet lines when they are grouped or ungrouped, see *Organization of Time Sheet Lines on a Time Sheet* on page 72.



You can review details for or add notes to any particular time sheet line. See *Viewing and Specifying Time Sheet Line Details* on page 80.

- c. Select the desired check boxes for particular time sheet lines in the time sheet.

If items are grouped, their group names (headings) also have check boxes, and selecting the check box for a group name selects all of its subordinate work items.

- d. 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 view a list of the submitted time sheets that have at least one task in that project that the project manager 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  
**Open > 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 **Time Approval** section at the bottom of the **Project Summary** tab lists for your approval the time sheets that have time submitted for the

project. For each resource, time is expressed in units of hours or days based on that user's time sheet policy for entering time.

Time Approval						
Resource	Time Period - Time Sheet #	Manager	Status	Time to Approve	Total Time	Approvable Line Costs
<input type="checkbox"/> Andy Madison	<a href="#">9/1/12 - 9/30/12 - 1</a>	Kim Song	Submitted	32 (Hours)	32 (Hours)	\$3,040.00
<input type="checkbox"/> Cindy Ruth	<a href="#">7/16/12 - 7/31/12 - 1</a>	Kim Song	Submitted	12 (Hours)	12 (Hours)	\$1,140.00
<input type="checkbox"/> Check all	<input type="button" value="Approve"/>	<input type="button" value="Reject"/>				

To view cost data in the **Approvable Line Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant. This cost data is the total cost that you can approve for all the tasks in the project that have time submitted on that time sheet.

**Total Time** on a time sheet can be more than **Time to Approve** if you are not an approver for some of the lines on the time sheet.

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, go to [step 5](#).

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

- a. Select check boxes 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, go to [step 4 on page 120](#).

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 view for your approval some time sheet lines for request, package, or miscellaneous work item types in addition to time sheet lines for projects or tasks.

- b. All time sheet lines on a time sheet are either grouped or ungrouped. At the top right of the **Time Sheet Details** section, you can click the available link in **Group | Ungroup Items** if you want to change the appearance of the time sheet to include or exclude groups for work items. The option you selected most recently has no link. Your display preference applies to all existing and new time sheets you access.

For information about the organization of time sheet lines when they are grouped or ungrouped, see [Organization of Time Sheet Lines on a Time Sheet on page 72](#).



You can review details for or add notes to any particular time sheet line. See [Viewing and Specifying Time Sheet Line Details on page 80](#).

- c. Select the desired check boxes for particular time sheet lines in the time sheet.

If items are grouped, their group names (headings) also have check boxes, and selecting the check box for a group name selects all of its subordinate work items.

- d. 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 the resource to submit a time sheet for each time period. (For information about time sheet policies, see [Time Sheet Policies on page 100](#) 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 **Open > Reports > Create 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.

Submit Report: Delinquent Time Sheets

**Report Parameters**

\*Previous Time Periods to Show:

\*Include Current Period:  Yes  No

\*Grace Period in Days (affects past periods only):

Resource:  

Direct Manager:  

Default Time Approver:  

Organization Unit:  

Time Sheet Status:  

Sort by:  

Include Children Organization Units  Yes  No

**Scheduling and Output Options**

Run Report Immediately

Run Report On:  

Repeat Every    Until  

Send email to:   when report is finished

**Advanced Notifications**

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)	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.
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	<p>Limits the search to delinquent time sheets with any of the following statuses you specify:</p> <ul style="list-style-type: none"> <li>● <b>In Rework</b></li> <li>● <b>Missing</b> (that is, not created)</li> <li>● <b>Unsubmitted</b></li> </ul> <p>If not specified, delinquent time sheets that have any of these statuses and that meet other filter criteria are included.</p>

Field Name (*Required)	Description
Sort by	Sort the results by <b>Period Name</b> or <b>Resource</b> .
Include Children Organization Units	Option to include delinquent time sheets of the children of the selected Organization Unit.



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.



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## 4 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 and no subsequent changes can be made to the time sheet.

After a time sheet has been frozen and data extraction or other external interaction 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.

Analogous to time approvers, if multiple billing approvers (such as a resource group) are specified for a resource, only one of the billing approvers needs to freeze or close the resource's time sheets.

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 **Open > Time Management > Time Sheets > Freeze/Close Time Sheets.**

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

Search for a Time Sheet to Freeze/Close

Search for a Time Sheet to Freeze/Close

Find Time Sheets By:

Period Type: Weekly

Time Period: [dropdown]

Previous Time Periods to Show: 1

Resource: [text box]

Manager: [text box]

Org Unit: [text box]

Time Sheet Status: Approved

Include Closed Time Sheets?  Yes  No

Sort By: [dropdown]  Ascending  Descending

\*Results Displayed Per Page: 50 \*Max Rows: 500

Search

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

Field Name (*Required)	Description
<b>Search criteria</b>	
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 configuration, the list can include the following: <ul style="list-style-type: none"> <li>• <b>Weekly</b> (every week, starting by default on a Monday)</li> <li>• <b>Bi-Weekly</b> (every two weeks, starting by default on a Monday; for example, <b>8/29/10 - 9/11/10</b> is a biweekly time period in August and September 2010)</li> <li>• <b>Semi-Monthly</b> (twice a month, where the first time period always ends on the 15th of the month; for example, the two semimonthly time periods of September 2010 are <b>9/1/10 - 9/15/10</b> and <b>9/16/10 - 9/30/10</b>)</li> <li>• <b>Monthly</b> (every full calendar month)</li> </ul>
Time Period	Enabled when <b>Period Type</b> is selected and a value is chosen for it. Optionally select a particular time period 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 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.

Field Name (*Required)	Description
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	Option to include closed time sheets in the search.
<b>Sort criteria</b>	
Sort By	<p>Parameter (column in the search results) to use to sort the search results. The options are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Resource.</b> As limited by the search criteria, the resources whose time sheets can be frozen or closed.</li> <li>• <b>Time Period - Time Sheet #.</b> Links to the time sheets having the time period and time sheet number (a unique combination).</li> <li>• <b>Manager.</b> The manager of the <b>Resource</b>.</li> <li>• <b>Status.</b> The <b>Time Sheet Status</b> as specified in the search criteria.</li> <li>• <b>Total Time.</b> The total number of hours or days on the time sheet, regardless of the search criteria or who its approvers are.</li> <li>• <b>Total Costs.</b> The costs associated with the <b>Total Time</b>.</li> </ul>
Ascending or Descending	Displays the results in ascending or descending order.
*Results Displayed per Page	Maximum number of results to be displayed per page.
*Max Rows	Maximum number of rows to display for all pages.

#### 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.

##### Search for a Time Sheet to Freeze/Close

 [Export to Excel](#)

Select a Time Sheet to Freeze/Close						Showing 1 to 1 of 1	
Resource	Time Period - Time Sheet #	Manager	Status	Total Time	Total Costs		
<input type="checkbox"/> Joseph Banks	1/1/13 - 1/15/13 - 1		Approved	15 (Hours)	0		
<input type="checkbox"/> Check all <a href="#">Freeze</a> <a href="#">Close</a>						Showing 1 to 1 of 1	

Search for a Time Sheet to Freeze/Close

Find Time Sheets By:

Period Type:  Semi-Monthly  Monthly  Quarterly

Time Period:

Previous Time Periods to Show:

Manager:

Org Unit:

Time Sheet Status:

Include Closed Time Sheets?  Yes  No

Resource:

Sort By:   Ascending  Descending

Results Displayed Per Page:  Max Rows:

[Search](#)



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

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

#### 6. Freeze or close the time sheets as follows:

- 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.



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# 5 Creating Work Allocations for Users

## 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 packages and miscellaneous work items (see *Using Work Items in Time Sheets and Work Allocations* on page 15).

Managers might want to allocate a certain amount of time for miscellaneous work items such as meetings, or they may anticipate that a specific 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 view 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 for projects and tasks are superseded by the assigned resources and expected time for projects and tasks when HP Time Management and HP Project Management are integrated using the Cost and Effort policy in project settings (see *Chapter 6, Integrating Time Management and Project Management*, on page 147).



Work allocations for requests are superseded by the assigned resources specified in request types (see the *HP Demand Management Configuration Guide*).

HP strongly recommends that you *not* use work allocations for projects, tasks, or requests, but only for packages and miscellaneous items as needed.

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  
**Open > Time Management > Allocations > Create Allocations.**

The Create Work Allocations page appears.

## Create Work Allocations

Work Item Type	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Standard Discount %	Billing Discount %
Project	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Project	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Project	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Project	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Project	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

New Allocations:

### Work Item Filters

#### General Filters

Modified in Last x Days:  Created in Last x Days:

Include Closed?  Yes  No

#### Project Filters

Project Name Contains:

Project Resource:

Project Manager2:

Scheduled Start From:

Scheduled Start To:

Scheduled Finish From:

Scheduled Finish To:

#### Request Filters

Request Type:

Request Assigned To:

Only requests whose assigned group includes me:  Yes  No

Request Resource:

Only requests that list me as a resource:  Yes  No

Request Assigned Group:

Request Number:

#### Task Filters

Task Name Contains:

Project:

Task Type:

Project Assigned Resource:

Task Status:

Project Manager:

Scheduled Start From:

Scheduled Start To:

Scheduled Finish From:

Scheduled Finish To:

#### Package Filters

Package Workflow:

Package Number:

Package Assigned Group:

Package Assigned To:

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

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



HP strongly recommends that you *not* use work allocations for projects, tasks, or requests, but only for packages and miscellaneous items as needed.

3. (Optional) Use the **Work Item Filters** section of the Create Work Allocations page to limit the collection of work items available in the autocomplete 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 autocomplete 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 autocomplete 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 autocomplete 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
<b>General Filters section</b>	
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	<p>Option to include closed work items in the list of work items. Closed work items are as follows:</p> <ul style="list-style-type: none"> <li>• Requests that are closed</li> <li>• Tasks that are complete and whose projects still allow time to be logged</li> <li>• Packages that are closed</li> </ul>
<b>Project Filters section <sup>a, b</sup></b>	
Project Name Contains	Limits the list of projects to those with names that include the string you specify.
Project Resource	Limits the list of projects to those with a participant list that includes the resource you specify. (Participant lists include resources in the project's staffing profile, resources directly assigned on tasks in the work plan, and summary task owners.)
Project Manager	Limits the list of projects to those that have the project manager you specify.
Scheduled Start From	Limits the list of projects to those that start on the date you specify or later.
Scheduled Start To	Limits the list of projects to those that start on the date you specify or earlier.
Scheduled Finish From	Limits the list of projects to those that finish on the date you specify or later.
Scheduled Finish To	Limits the list of projects to those that finish on the date you specify or earlier.

Field Name	Description
<b>Request Filters section <sup>b</sup></b>	
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.
Only requests whose assigned group includes me	If set to <b>Yes</b> , limits the list of requests to those that include you in their assigned groups.
Request Resource	Limits the list of requests to those that have resource lists that include the user you specify.
Only requests that list me as a resource	If set to <b>Yes</b> , limits the list of requests to those that include you in their resource lists.
Request Assigned Group	Limits the list of requests to those with the Request Assigned Group specified from a list of security groups.
Request Number	Limits the requests to only the one with the specified number.
<b>Task Filters section <sup>b, c</sup></b>	
Task Name Contains	Limits the list of tasks to those with names that include the string you specify.
Project	Limits the list of tasks to those in the project you specify. The project must have a work plan, and the user must be allowed to log time against the project or its tasks.
Task Type	Limits the list to tasks or to summary tasks, or displays both.
Project Assigned Resource	Limits the list of tasks to those with the assigned resource you specify.
Task Status	Limits the list to tasks of a particular status.
Project Manager	Limits the list of tasks to those in projects that have the project manager you specify.

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.
<b>Package Filters section</b>	
Package Workflow	Limits the list of packages to those with the workflow you specify.
Package Number	Limits the list of packages to only the one with the package number 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.
<ul style="list-style-type: none"> <li>a. As an additional project filter, only projects that track time at the project level are displayed.</li> <li>b. HP strongly recommends that you <i>not</i> use work allocations for projects, tasks, or requests.</li> <li>c. If a project has a work plan and it tracks time at the project level, the task filter returns top-level summary tasks.</li> </ul>	

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 autocomplete 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	<p>List of work items depends on the selection in the <b>Work Item Type</b> field. The work item types (in bold below) and descriptions of their work items are as follows:</p> <p><b>Note:</b> HP strongly recommends that you <i>not</i> use work allocations for projects, tasks, or requests.</p> <ul style="list-style-type: none"> <li>• <b>Project.</b> List of projects in HP Project Management, identified by name</li> <li>• <b>Request.</b> List of open requests in HP Demand Management, identified by the request numbers</li> <li>• <b>Package.</b> List of open packages in HP Deployment Management, identified by the package numbers</li> <li>• <b>Task.</b> List of tasks in HP Project Management, identified by name</li> <li>• <b>Misc.</b> List of miscellaneous work items, such as <b>Meetings</b> or <b>Vacation</b></li> </ul>
Work Item	<p>Name or number of the work item, based on the work item type, as follows:</p> <ul style="list-style-type: none"> <li>• For projects, a project name</li> <li>• For requests, a request number</li> <li>• For packages, a package number</li> <li>• For tasks, a task name</li> <li>• For miscellaneous, a selection from HP Time Management, such as <b>Meetings</b> or <b>Vacation</b></li> </ul>
Work Item Set	<p>Work item set of the work items selected, as follows:</p> <ul style="list-style-type: none"> <li>• For request work items, the specific request type</li> <li>• For package work items, the workflow used by the package</li> <li>• For project and task work items, the project</li> </ul>
Description	<p>Value in the <b>Description</b> field for the given work item, truncated to 50 characters.</p>

Field Name	Description
Original Bdgt (Hrs)	<p>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.</p> <p>Once you have created the work allocation, the following occur:</p> <ul style="list-style-type: none"> <li>• This value is assigned to the <b>Current Bdgt (Hrs)</b> field, which you can later edit.</li> <li>• The <b>Original Bdgt (Hrs)</b> 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.</li> </ul>
Current Bdgt (Hrs)	<p>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.</p>
Standard Discount %	<p>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.</p>
Billing Discount %	<p>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.</p>

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 the following:

- **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** check box.
- 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, complete the **Allow User to Update Charge Codes** check box to indicate whether users are allowed to update the set of charge codes.

If your PPM Center instance supports multiple languages, any charge code a user creates is defined in the language the user selected at logon (the user's session language). After the charge code is created, it can be modified only in its definition language. For more information, see the *Multilingual User Interface Guide*.

- b. Complete the **Charge Codes are Required on Time Sheets** check box 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 proceed to [step 10](#).

10. Repeat [step 3 on page 136](#) through [step 9](#) 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 **Open > 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
<b>Search criteria</b>	
Work Item Type	Limits the search to work allocations for a single type of work item.
Work Item Set	Limits the search to work allocations for a specific work item set.

Field Name (*Required)	Description
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 <i>and</i> 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	Option to include closed work allocations in the search.
<b>Sort criteria</b>	
Sort By	Parameter to use to sort the search results. The options are as follows: <ul style="list-style-type: none"> <li>• <b>Work Item Type</b></li> <li>• <b>Work Item Set</b></li> <li>• <b>Work Item</b></li> <li>• <b>Original Budget (Hrs)</b></li> <li>• <b>Current Budget (Hrs)</b></li> </ul>
Ascending <i>or</i> Descending	Displays the results in ascending or descending order.
*Maximum Lines Displayed	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 check boxes 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 134](#).

- To delete work allocations, select the ones to delete using the check boxes 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 check boxes in the **Close** column, then click **Close**.

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

---

# 6 Integrating Time Management and Project Management

## 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 102 and *Integration of HP Time Management and HP Project Management* on page 104.

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 the following:

- Level of detail at which 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 150](#)) 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 **Open > 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 **Settings** on the top right of the page.

The Project Settings page opens. The left side has a column of buttons, one for each policy, under the **Select a policy to configure:** heading.

\* Project Type: Standard Project (PFM) - Medium Size (Direct Reports)

Description: PFM - Project (Capitalized)(Direct Report Resources)

Select a policy to configure:

- Project Fields**
- Work Plan
- Request Types 
- Scheduling
- Schedule Health
- Cost and Effort
- Cost and Earned Value Health 
- Microsoft Project Integration
- Staffing Profile Assignments
- Project Health 
- Issue Health 
- Task Auditing 
- Project Overview Layout
- Project Security
- HP Service Manager

 Key: Policies are inherited from Project Type and cannot be altered.

#### Project Fields

Some fields must be used by Project Management and are always enabled.

##### Schedule Fields

Fields enabled here will be available for entry and viewing in the work plan. The Scheduled Effort field is enabled or disabled by the Cost and Effort policy.

- Scheduled Start
- Scheduled Finish
- Scheduled Duration
- Scheduled Effort (controlled by the Cost and Effort policy)

##### Actuals Fields

Actuals fields track the progress of the work plan execution. Fields enabled here will be available for entry and viewing in the work plan. Effort fields are enabled or disabled by the Cost and Effort policy.

- % Complete
- Actual Start
- Actual Finish
- Actual Duration (always system-calculated)
- Actual Effort (controlled by the Cost and Effort policy)
- Estimated Remaining Effort (controlled by the Cost and Effort policy)
- Estimated Finish Date

##### Additional Fields

- Service (used to categorize services)  Is required
- Activity (used to categorize tasks, recommended for Capitalization)
- Role (used to categorize resources, recommended for Work Load and Project Staffing)

##### Milestone Display

You can control which milestones are visible in the Milestones tile on the Project Overview page. Milestones are identified as Major Milestones in the Edit Task page.

- Display Major Milestones only



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, click **Cost and Effort**.

The **Cost and Effort** policy is displayed. (It is a tall page that is shown in sections from top to bottom as applicable in [step 6](#) through [step 8](#).)

6. In the **Resource Load Settings** section at the top of the **Cost and Effort** policy, do the following:

Project Settings - ERP Financial Upgrade

Save Done Cancel

\* Project Type: Standard Project (PFM) - Medium Size (Direct Reports)  
 Description: PFM - Project (Capitalized)/Direct Report Resources

Select a policy to configure:

- Project Fields
- Work Plan
- Request Types
- Scheduling
- Schedule Health
- Cost and Effort**
- Cost and Earned Value Health
- Microsoft Project Integration
- Staffing Profile Assignments
- Project Health
- Issue Health
- Task Auditing
- Project Overview Layout
- Project Security
- HP Service Manager

Key: Policies are inherited from Project Type and cannot be altered.

### Cost and Effort

#### Resource Load Settings

Work Load Category: Strategic Projects

Staffing Profile represents the work load imposed by the project  
 It is recommended that you use the staffing profile as the planned work load for your project. This allows the project manager to plan and schedule the project in phases without concern that the resources will appear unutilized.  
 In this option, the staffing profile represents both planned and actual resource load. Planned load is always entered directly on the staffing profile. Actual load can be entered directly on the staffing profile or on the work plan or time sheets.

Enter actuals directly on the staffing profile  
 Use actual information from the work plan and Time Management when viewing actuals in the staffing profile  
 Actual Effort must be tracked on the work plan in order to use this option.

Work plan task assignments represent the work load imposed by the project  
 This option is only recommended for short projects when the work plan is fully defined and scheduled.  
 Scheduled Effort and Actual Effort must be tracked on the work plan in order to use the work plan as work load.

#### Scheduled Effort in the Work Plan

Use Scheduled Effort during planning  
 Tracking Scheduled Effort in the work plan is required when automatically calculating planned costs or when the work plan represents resource work load.

Automatically calculate Scheduled Effort  
 Manually enter Scheduled Effort per task assignment

Allow override of effort calculation mode in the work plan

#### Actual Effort in the Work Plan

Track Actual Effort per resource assignment  
 Tracking Actual Effort in the work plan is required when automatically calculating actual costs, when using Time Management to track actuals against the work plan, or when the work plan represents resource work load.

Require resources to enter % Complete along with actual effort  
 If this option is selected, when a resource enters actual effort for an assigned task (on time sheets or elsewhere), the resource must also specify a non-zero value for % Complete. If this option is not selected, resources do not need to specify % Complete, and project managers can specify it later.

Track Estimated Remaining Effort per resource assignment  
 Tracking Estimated Remaining Effort is not allowed when using Time Management to track actuals against the work plan at a summary task or project level. Once actuals have been entered, this option cannot be deselected.

#### Time Management

- a. In the **Scheduled Effort in the Work Plan** subsection, select the **Use Scheduled Effort during planning** check box (it is selected by default) if you want to automatically calculate planned costs (see [step 8 on page 155](#)) 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** or **Expected Days** field on the time sheet.

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

If you select the subordinate **Require resources to enter % Complete along with actual effort** check box, resources must specify a non-zero value for **% Complete** when they specify actual effort on time sheets or elsewhere. (This check box is selected by default.)

If you select the subordinate **Track Estimated Remaining Effort per resource assignment** check box, resources must report time at the **Task level** specified in [step b on page 153](#). (By default, this check box is not selected.)

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 in the middle of the **Cost and Effort** policy, do the following:

The screenshot shows the 'Time Management' section of a software interface. It contains several settings:

- Use Time Management to track actuals against this project.**  
When the project has a work plan, you can integrate with Time Management if your organization uses time sheets, allowing resources to enter their actuals data in a single location.
- Track time at the:**
  - Task level**
  - Summary tasks at hierarchy level:** 2 (dropdown menu)  
Not available when tracking Estimated Remaining Effort
  - Project level**  
Not available when tracking Estimated Remaining Effort
- Allow the following to report time on this project:**
  - Project resources**  
Resources assigned to tasks, resources on the staffing profile, and summary task owners.
  - Assigned resources**  
Resources can log time against tasks to which they are assigned, or (if tracking time at a summary task or project level) to summary tasks above them in the project hierarchy.
  - All resources**  
All resources who can see the project can log time against it.
- After a task is complete, allow time to be logged:**
  - [ ] Day(s) more
  - [ ] Time period(s) more (for time period in which the task is complete, enter 0)
  - Any time
  - Do not allow. Resources cannot add tasks that are complete to their timesheets.
- Time logged against this project must be approved by a project representative from the following group:**
  - Participant Group: Stakeholders (dropdown menu)
  - Security Group: [ ] (dropdown menu)

The 'Financial Management' section is partially visible at the bottom of the screenshot.

- a. Select the **Use Time Management to track actuals against this project** check box (it is deselected by default).

The subordinate options become enabled for selection.



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, that is, you cannot deselect this option.

b. Under the **Track time at the:** heading, specify one of the following levels of detail at which resources must report, on time sheets, the time they spent on this project's tasks:

- **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 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).

c. Under the **Allow the following to report time on this project:** heading, specify one of the following groups of resources who are allowed to report time (at the level specified in [step b](#)):

- **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 the project tracks time at the **Task level** (as specified in [step b](#)), resources who are assigned to the task can log time against it at that level only. If the project tracks time at the **Project level** or at **Summary tasks at hierarchy level: <X>** (as specified in [step b](#)), resources who are assigned to tasks at lower levels in that project can log time representing those tasks only at the higher project or summary task level. This is the default option.
- **All resources.** All resources who can view the project (as controlled by the Project Security policy) can log time against any task in the project.

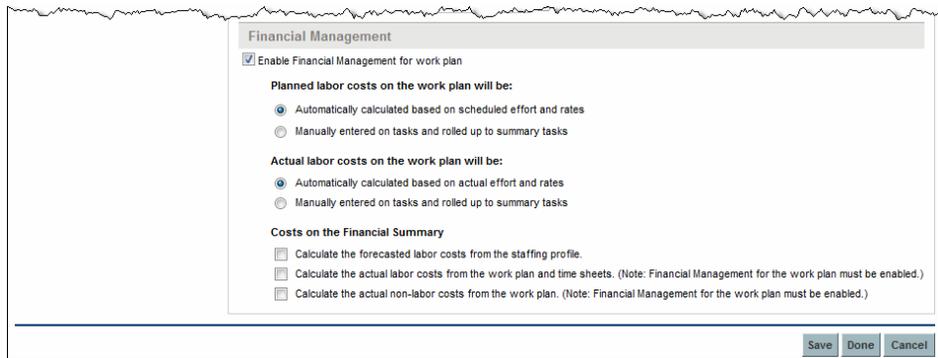


If a resource not assigned to a task logs time against it through a time sheet, the task status would not be changed. Only the resource assigned to a task can change the task status by logging time against it.

- d. Under the **After a task is complete, allow time to be logged:** heading, specify one of the following options for whether and 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.**
- e. Under the **Time logged against this project must be approved by a project representative from the following group:** heading, specify one of the following options for 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 108.

8. If you want HP Project Management to calculate actual labor costs based on actual effort passed from HP Time Management, complete the **Financial Management** section at the bottom of the **Cost and Effort** policy.



The screenshot shows a dialog box titled "Financial Management" with a light gray header. Below the header, there is a checked checkbox labeled "Enable Financial Management for work plan". Underneath, there are two sections: "Planned labor costs on the work plan will be:" and "Actual labor costs on the work plan will be:". Each section has two radio button options: "Automatically calculated based on scheduled effort and rates" (selected) and "Manually entered on tasks and rolled up to summary tasks". At the bottom, there is a section titled "Costs on the Financial Summary" with three unchecked checkboxes: "Calculate the forecasted labor costs from the staffing profile.", "Calculate the actual labor costs from the work plan and time sheets. (Note: Financial Management for the work plan must be enabled.)", and "Calculate the actual non-labor costs from the work plan. (Note: Financial Management for the work plan must be enabled.)". At the bottom right of the dialog box, there are three buttons: "Save", "Done", and "Cancel".

For more information, see the *HP Financial Management User's Guide* and the *HP Project Management User's Guide*.

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

The changes to the project are saved.



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