Tracking Resource Time Using Authorizations

Definitions

Authorize: Make a work task available for a resource to track time with a “blank check.” This method will allow a resource in Planview to add a task to his or her timesheet and track **actual time spent only**. Note: This method is not the best choice if you want to capture budgeted hours vs. actual time spent.

Icons in this job aid

Information

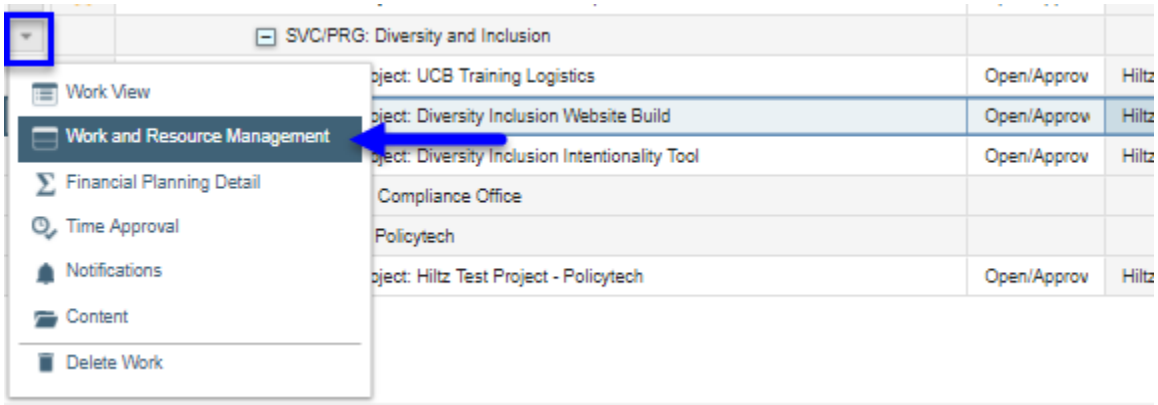
Project Manager’s Steps to Create Authorization

*The steps in this job aid begin AFTER the project’s schedule has been built. For more information about building a project schedule, see Building a Work Breakdown Structure (WBS).

When creating a new project, make sure you select the option to **track resource time on the project.

Open a Project’s Work and Resource Management View

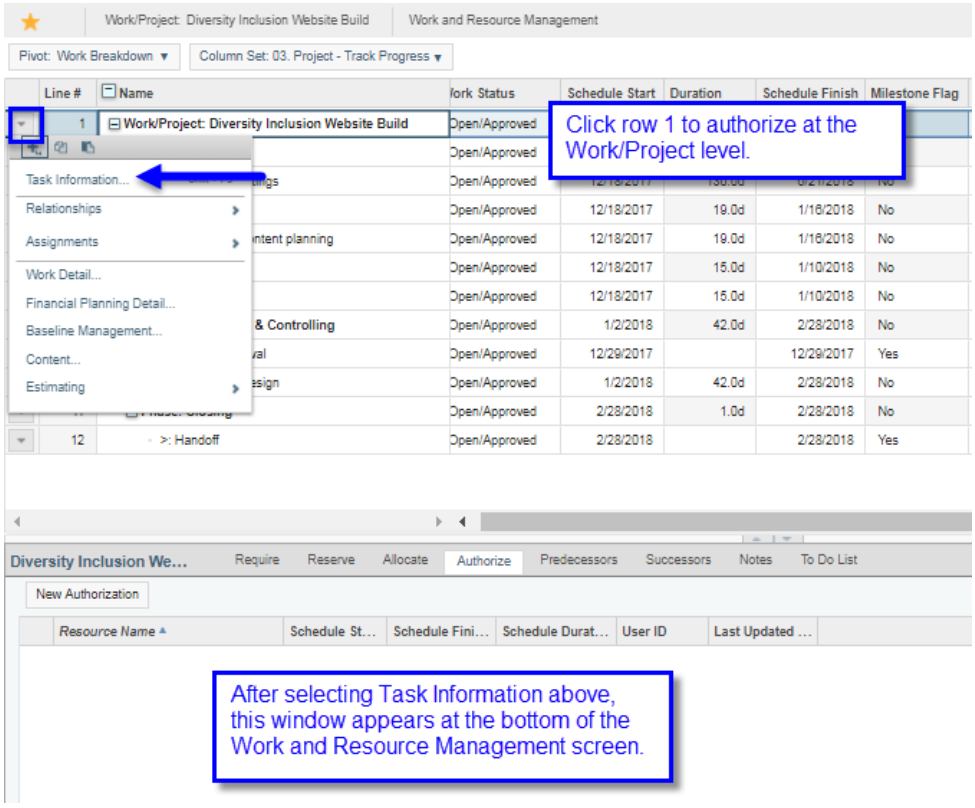
1. Log into Planview: https://vumc.pvcloud.com/planview/.
2. Use the Work Menu or the shortcut arrows to open a project’s Work and Resource Management screen.



Determine Authorization Level

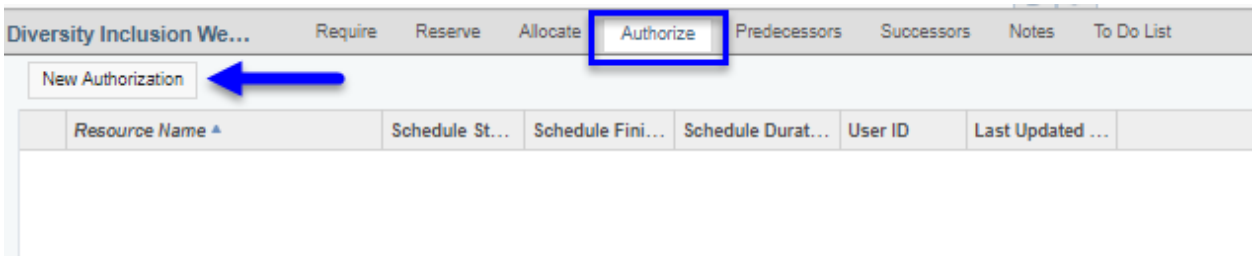
Tracking Resource Time Using Authorizations

1. Planview allows you to authorize work at any level in the project. Authorizations apply to any item below the selected level. For example, if you create an authorization at the Work/Project level, a resource will be able to track time against any phase, task, or sub-task in the WBS.
2. You have the ability to authorize individual resources to work on individual tasks or sub-tasks, but most users choose to create authorizations at the Phase or Work/Project level.
3. Click the **row** in the WBS for which you want to create an authorization. For the example in this job aid, we will authorize a resource to track time on any task in the entire project.
4. Once your cursor is inside the desired row, click the **shortcut arrow** on the left and choose **Task Information**.

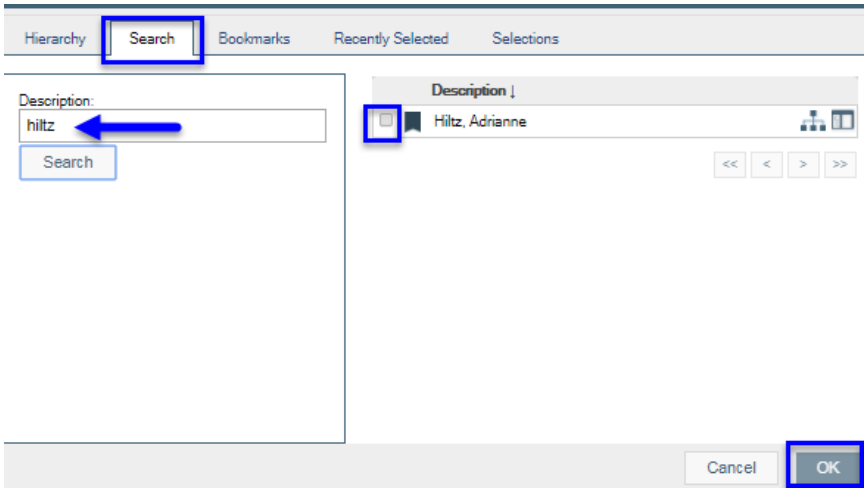


Create New Authorization

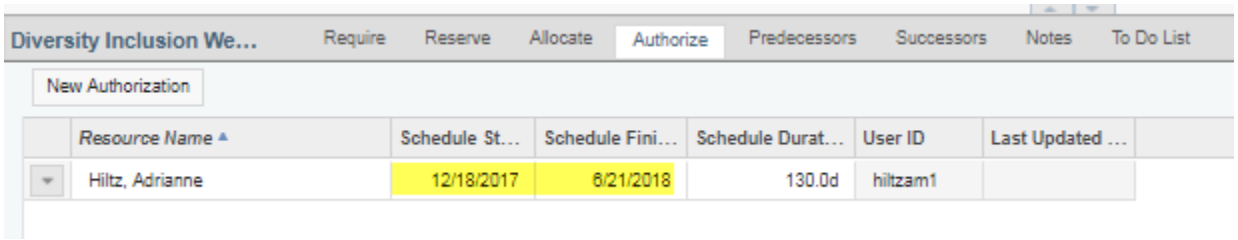
1. Once the Task Information window is open, click the **Authorize** tab.
2. Click **New Authorization**.



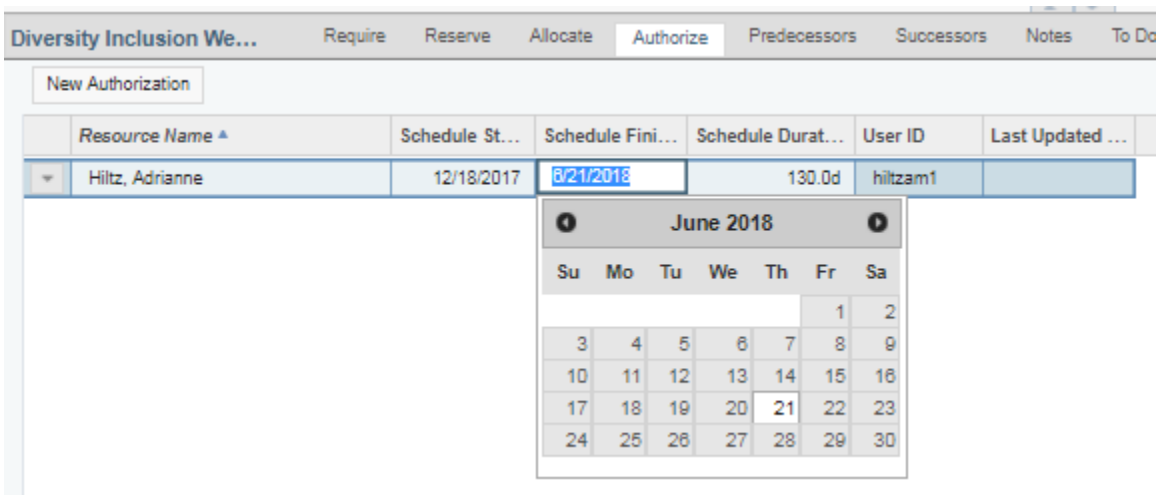
3. The Data Picker pop-up window opens. Click the **Search** tab to find a Resource by last name search. Once you have selected the Resource(s) you want to authorize, click **OK**.



4. The data picker window closes. Your new authorization will appear in the Authorize section of the Task Information window. The Schedule Start and Schedule Finish dates will auto-populate from your WBS schedule above.



5. If you want to change the dates, you can double-click to change them.



NOTE: The project or tasks will only appear for selection on the resource's timesheet for this scheduled start/finish period. For example, the schedule start and finish dates above are 12/18/2017 to 6/21/2018. This resource will not see this project available on her timesheet

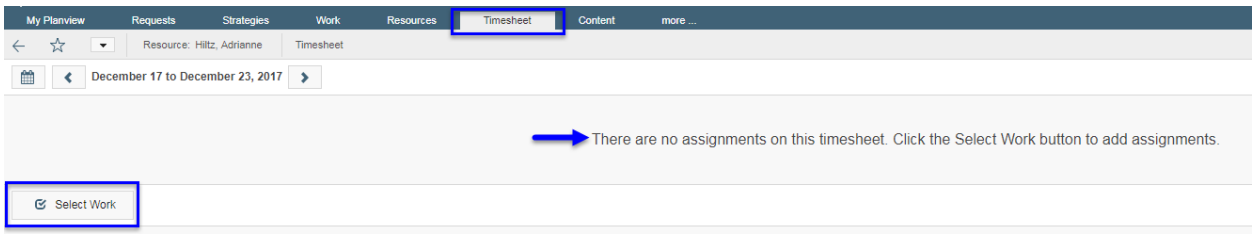
until 12/18, and the project will no longer be available after 6/21. This time period will need to be updated if work starts earlier or finishes later than schedule.

Resource's Steps to Track Time

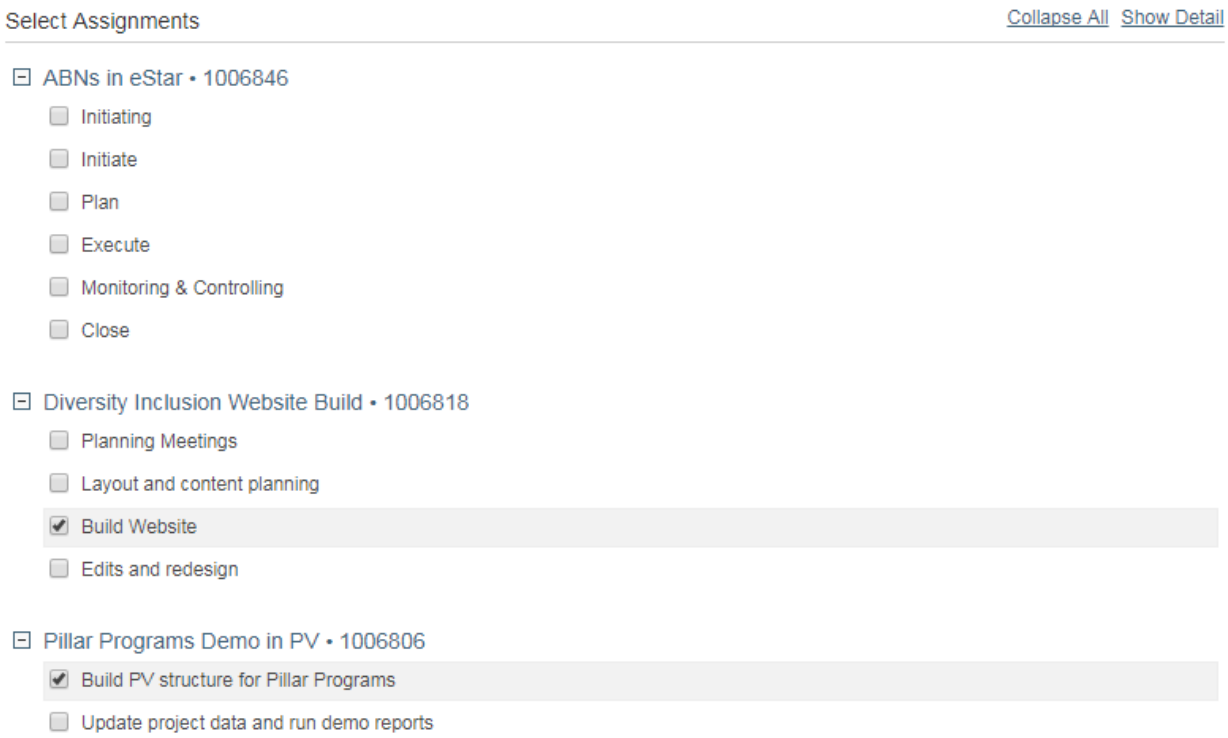
Add Work to Timesheet

Tasks are not automatically added to a resource's timesheet when a project manager authorizes work. The resource must open his or her timesheet and select the work to add to each week's timesheet.

1. Click the **Timesheet** tab to begin.



2. When you first access your timesheet, the screen will be blank with a message saying "There are no assignments on this timesheet." Click the **Select Work** button.
3. A screen will appear that shows all tasks for all projects for which you have been authorized to track time. Click the **checkboxes** next to the tasks you intend to track time for during the current time period (week).



4. Click **Done** to add the tasks to your timesheet.
5. All checked tasks now appear on your timesheet, listed project-by-project, for the current period. To track time, add time in quarter-hour segments into the corresponding cell for that task on each day.

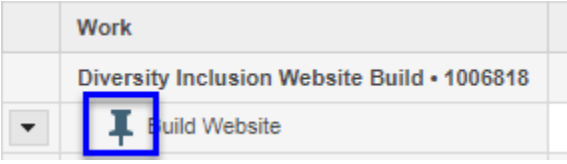
	Work	Sun 17	Mon 18	Tue 19	Wed 20	Thu 21	Fri 22	Sat 23	Total	Complete
	Diversity Inclusion Website Build • 1006818									
	Build Website								0h	
	Pillar Programs Demo in PV • 1006806									
	Build PV structure for Pillar Programs								0h	
	PM Curriculum Development • 1005113									
	Develop PM201			1h	1h	2h			4h	
	Develop PM202				1h	2h			3h	
	UCB Training Logistics • 1006817									
	Meeting Attendance		1h	1h					2h	
	Scheduling			1.5h					1.5h	
	Process Mapping for Future Requests								0h	
	All Standard Activities									
	Administrative Task			1h	3h				4h	
	Project Not Available in Planview								0h	
	Out of Office						8h		8h	
	Training		2h						2h	
	Total	0h	3h	4.5h	5h	4h	8h	0h	24.5h	

Select Work

All changes have been saved

Sign and Submit

NOTE: If you want a task to continue appearing on your timesheet for the next week(s), click the “pin” icon next to the task name. Once “pinned,” this task will appear on your timesheet until you “unpin” it from the list.



6. At the end of the week, once all time has been entered, click **Sign and Submit**. Your timesheet for the week will be saved.

   NOTE: VUMC has setup Planview such that time from the previous week is calculated on **Monday evenings**. If your manager or project manager wants to run reports on time spent the previous week, he or she should schedule those reports to run on **Tuesday morning** for the previous week.