Managing Resources with Clarity PPM
Version 15.8.1

Your Guide: Christi Rice

Agenda

- Introduction
- Accessing the New User Experience
- Resource List
- Resource Profile & Properties
- Resource Calendar
- Resource &Team Allocation
- Team vs Resource
- Resource Management
- Time Tracking and Approval

Part I: Introduction

Resource Management Definition

- Resource Management is the efficient and effective use of organization resources when they are needed.
- Clarity PPM Resource Management is the practice of managing resources in order to have the right resources working on the right projects, at the right time based on real time project timelines as the project is further defined.
- Resource Management functionality in its totality includes forecasting capacity and demand, understanding over and under allocated resources and understanding how much time it has taken to deliver a specific project, or task. This functionality enables you to control and predict resource utilization throughout the Project lifecycle and across the organization.

Why is Resource Management Important?

- Reduces risk by enabling management to easily identify resourcing constraints.
- Enables alignment of resources to the highest priority projects.
- Reduces the amount of manual efforts required to develop and maintain resource plans.
- Improves ability to be more proactive and efficient in resourcing.
- Creates transparency of resource information.
- Provides consistent resource capacity vs. demand functionality and reporting at the resource, project, program and portfolio levels.

Keys to Success – Data Quality

- Resources are tracking all their worked hours in a timely manner as “accurately” as possible.
- Project Resource Allocations remain current based on the needs of the project.
  - Resource data within Clarity PPM is highly visible - If not maintained, incorrect business decisions will be made. For example:
    - Hiring additional contract resources when not necessary.
    - Delaying or starting a project based on incorrect resource availability.
    - Over / Under utilization of resources.
- Project timelines/schedules are keep current.
  - They represent the overall commitment of resources to the project – If the timeline changes, without an update within Clarity PPM, the resource's commitment is over/understated.
- Resources profiles are maintained (primary role, availability, calendars).

Resource Management Definitions

Term	Definition
Availability	The number of hours a resource is available to work on any given day. By default, resources in Clarity PPM are available 8 hours per day.
Allocation	The hours, or % of time, a resource is designated to perform work on a specific project.
Assignments	The amount of work designated for a resource on a specific task.
Capacity	Is the aggregated availability value of all resources that carry the same primary role.
Demand	Is the aggregated value of all allocations for a primary role.
ETC	Estimate to Complete. The number of hours it will take the resource to complete their work on the task. As actual time is tracked against the assignment, the ETC will decrement.
Actuals	Completed work (in hours) that the resource has booked on a specific task via timesheets.
Primary Function	Name of role the resource performs for the organization. This does not have to align to an HR title, but in some cases may.

Resource Management in Clarity PPM

Availability 1

- Complete Resource records
  - Team
  - Primary Function (Role)
  - Availability (if different than default)
  - Calendar

Allocations 2

- Establish Projects
- Allocate Team to projects to highlight unfilled demand
- Replace Team with specific resources
- Allocate resources to projects
- Confirm allocations

Utilization 3

- Track actual hours
- Develop detailed task level WBS
- Create task dependencies
- Create resource task assignments
- Define estimate to complete (ETCs) for each task assignment
- Schedule WBS to evaluate and optimize dependencies/assignments
- Re-schedule to ensure accurate forecasting of uncompleted work

Key Outputs to be Expected

How many resources do we have?
What function do the resources have?
When are they available for work?

What projects resources are allocated to?
What % of time they are supporting the projects?

What is the actual amount of time spent?
What is the forecasted amount of work effort remaining at a project level?

Resource Management Roles & Responsibilities

Resource Manager (RM)

- Approve timesheets
- Ensure timesheets are submitted on time
- Ensure resources are updating their Resource Calendar
- Monitor Resource Allocations as needed
- Communicate resource risks and issues to PMs & Leadership
- Work with Project Manager to resolve resource work conflicts

Project Manager (PM)

- Ensure Resource Allocations are sufficient to meet Project Demand
- Communicate resource issues to the Resource Manager & Leadership
- Add resource / team member to project and set agreed upon allocation

Team Member (TM)

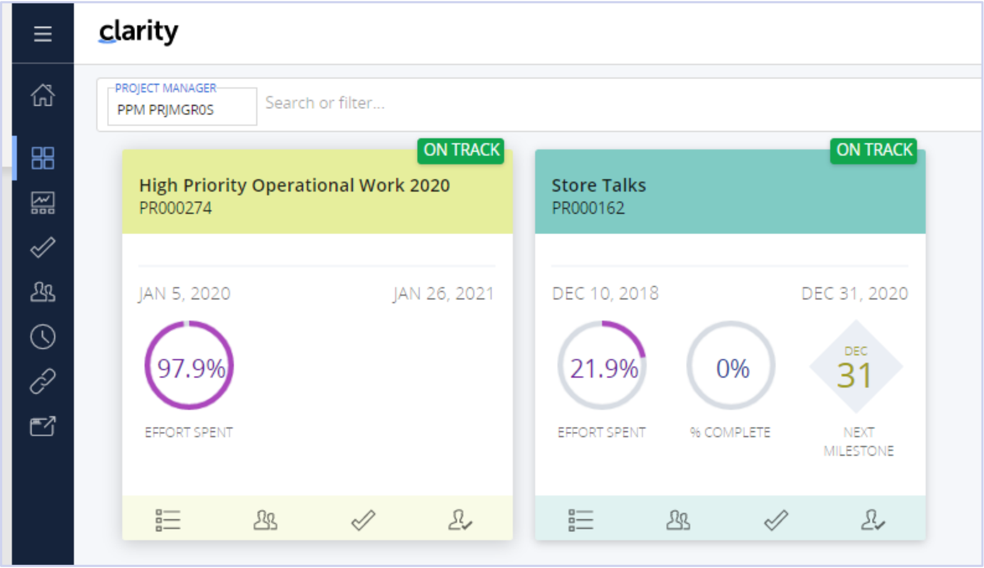
- Enter timesheets weekly
- Update ETCs via timesheets as necessary
- Maintain non-working days in personal calendar

Part 2: Accessing the New User Experience

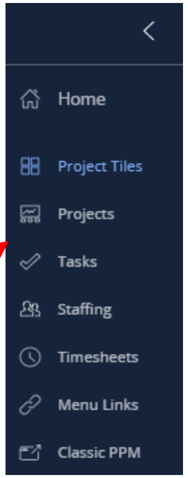
Differences - New UI vs Phoenix View

Some key differences between the New UI vs. Phoenix view

- **New UI**
  - Home screen automatically opens to the Project Tiles view
  - Several icons will appear in the left navigation panel - Icons
    - Home
    - Projects – Tiles
    - Projects – List
    - Tasks
    - Staffing
    - Timesheets
    - Menu Links
    - Classic CA PPM (Phoenix View)



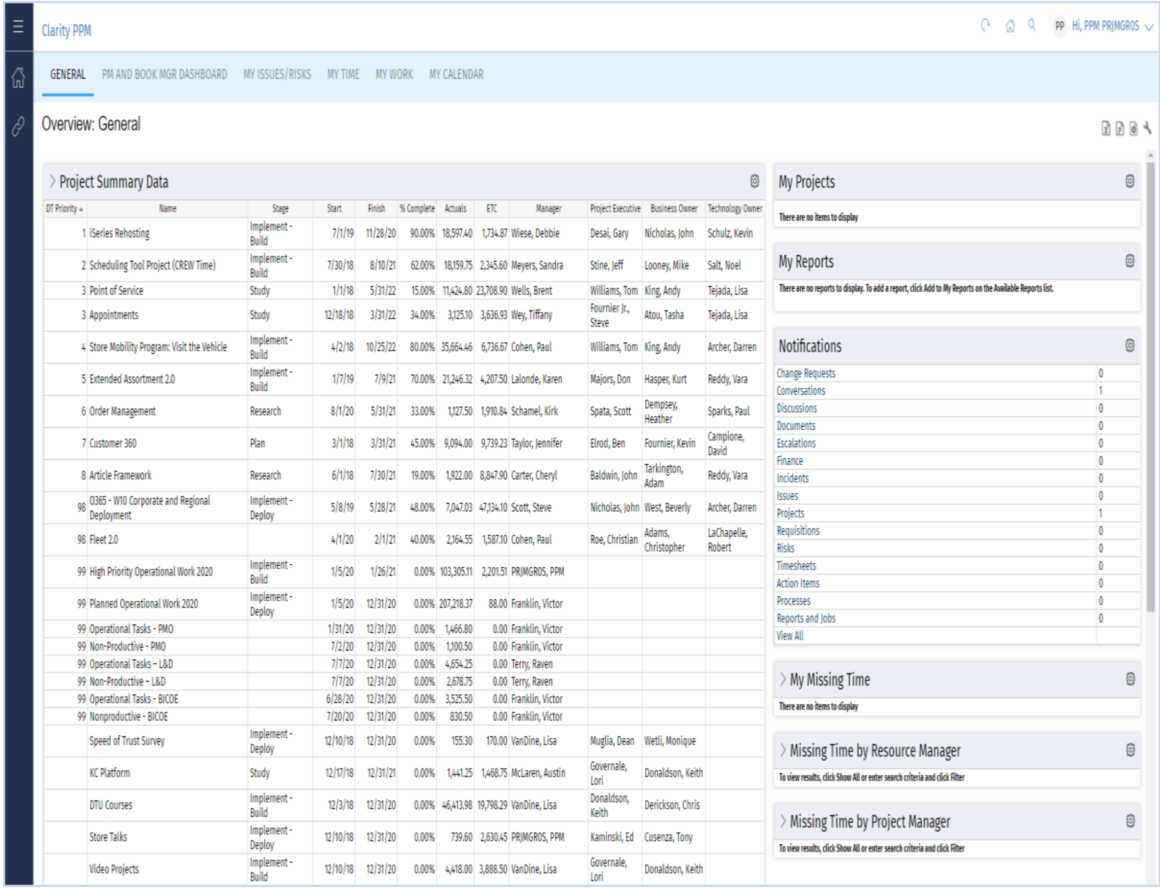
There is one additional icon on the top left corner of the page: When you click on this icon, it will expand the left navigation. It will show the icon plus a word description of the corresponding icon

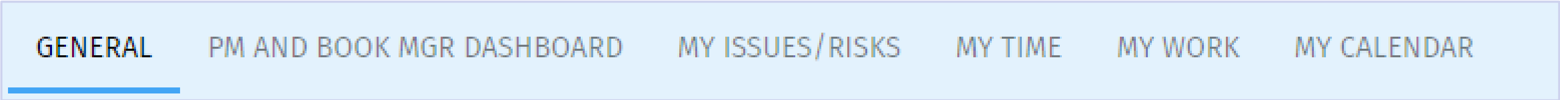


Differences - New UI vs Phoenix View

Some key differences between the New UI vs. Phoenix view

- **Phoenix view**
  - Looks much like the Classic view as currently used
  - Only 3 icons on the left navigation panel
  - Several icons will appear in the left navigation panel - Icons
    - Expand navigation panel 
    - Home 
    - Menu Links 
  - Still Access Portlets by hovering over Home 
  - Using the Tabs at the top of the page to access:
    - Access the PM/BM Dashboard
    - My Issues/Risks
    - My Time
    - My Work
    - My Calendar

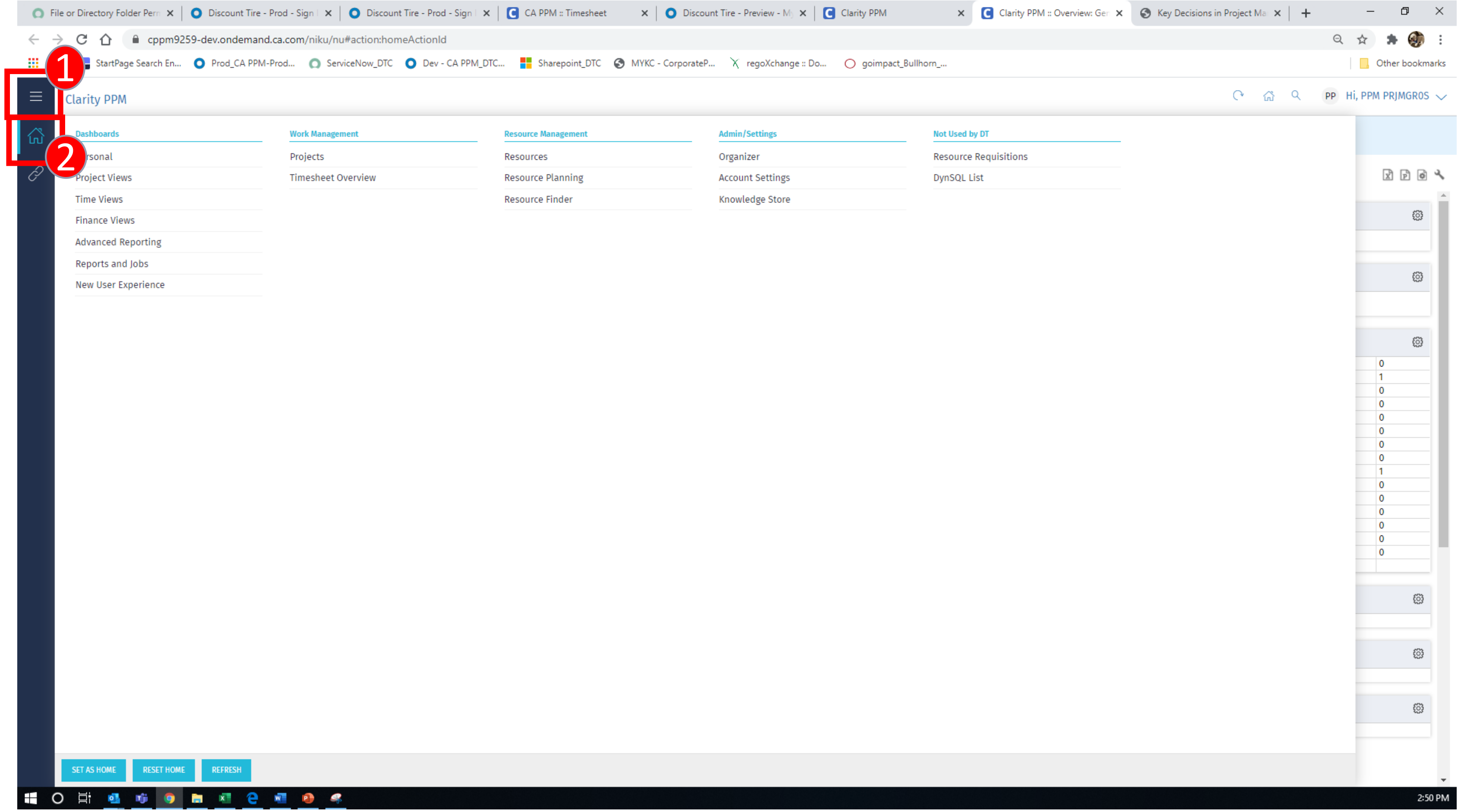




Differences - New UI vs Phoenix View

Some key differences between the New UI vs. Phoenix view

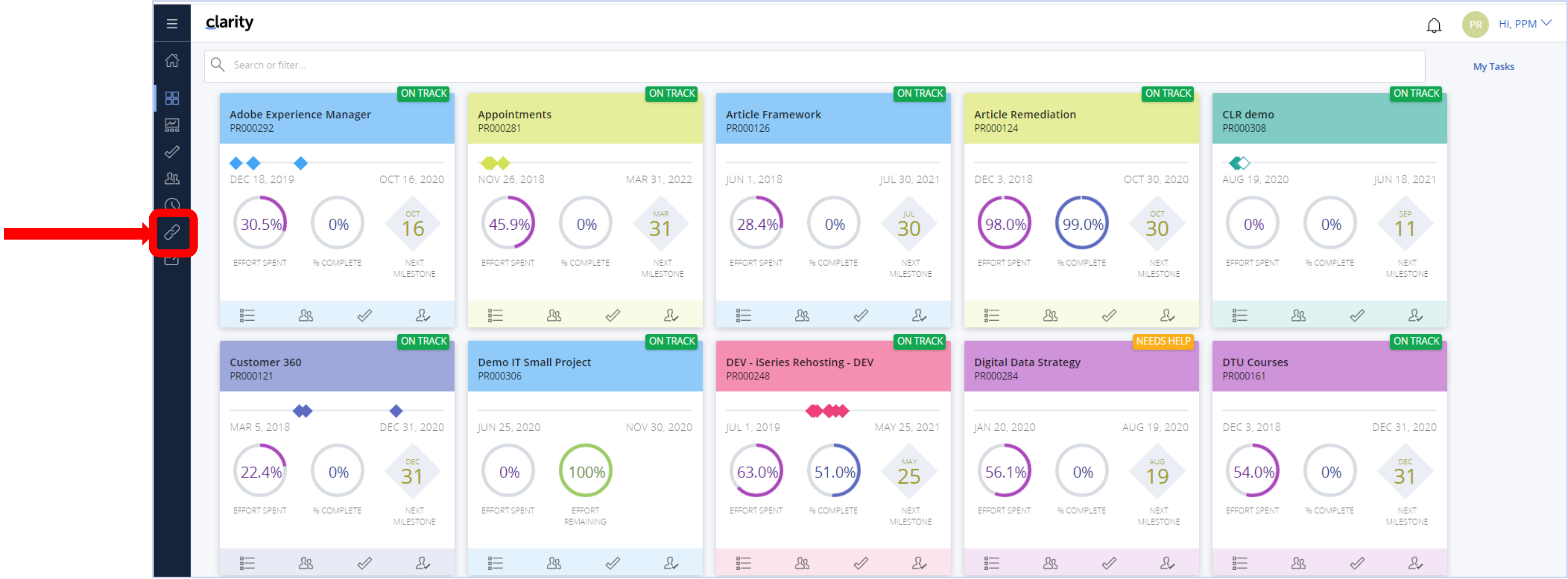
- **Phoenix view**
  1. Expand the left navigation panel with the top icon, same as in the New UI
  2. Hover over the home icon and it will show you the available portlets based on your security rights



Part 3: Resource List

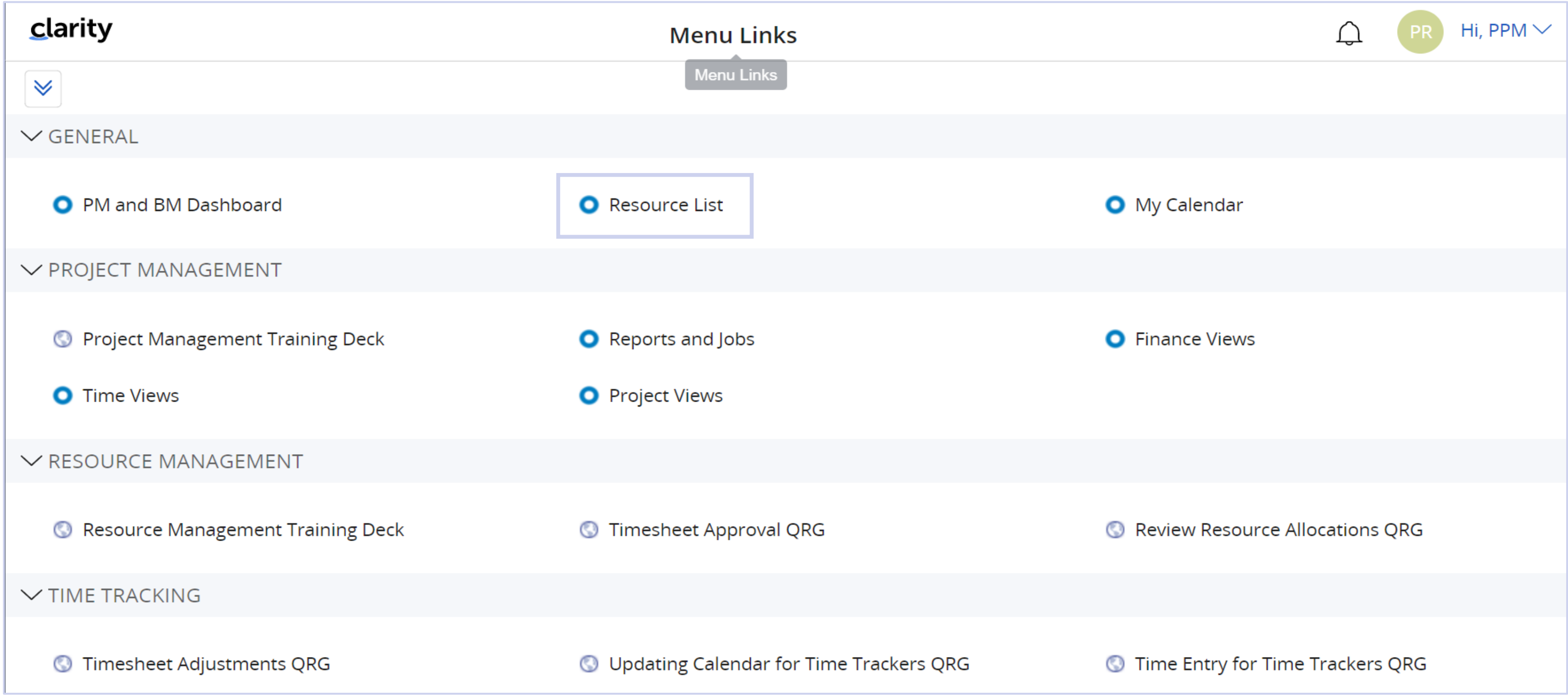
Accessing Resources

- The first step of resource management is validating resource properties.
- From the left navigation bar, select the Links icon. 



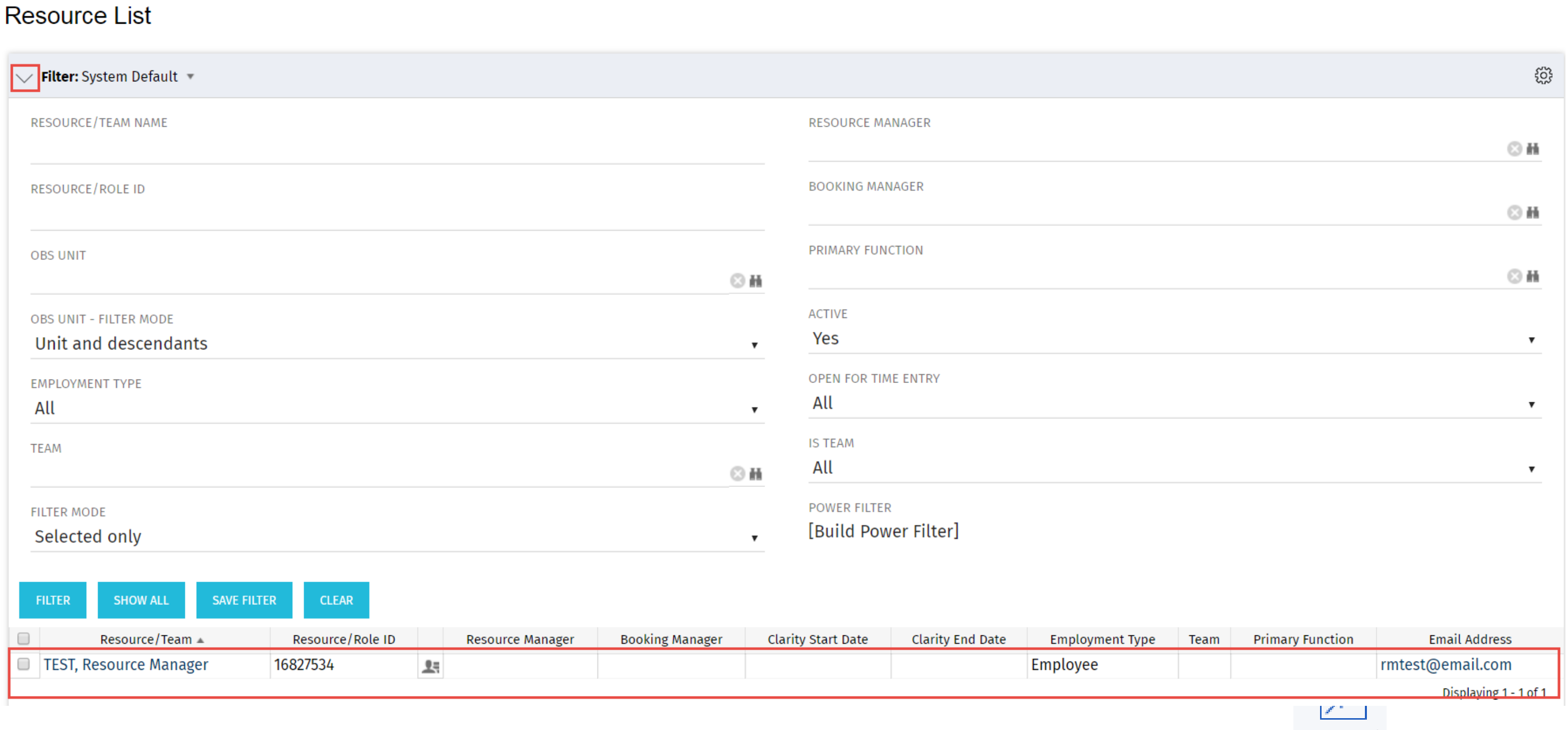
Resource List

- Under the “General” drop-down arrow, click on Resource List . This will bring you into the Resource List in classic Clarity PPM.



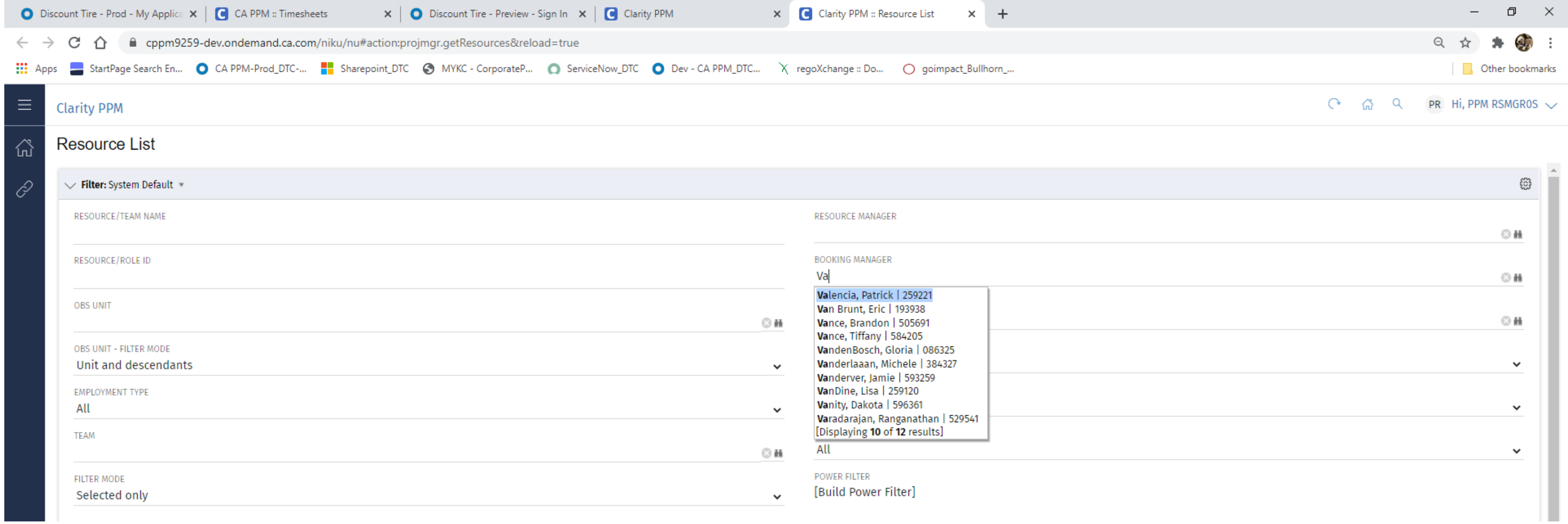
Resource List

- Click the Expand Filter button ( ) to open the filter section of the page if it is collapsed.
- The top portion of the screen is a set of filters giving the ability to search for resources meeting specific criteria.
- The bottom portion of the screen is a list displaying the results of the filter criteria.



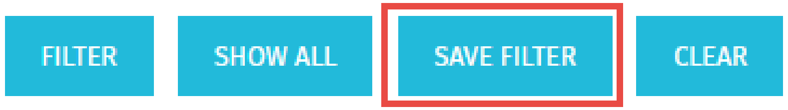
Filters and How They Work

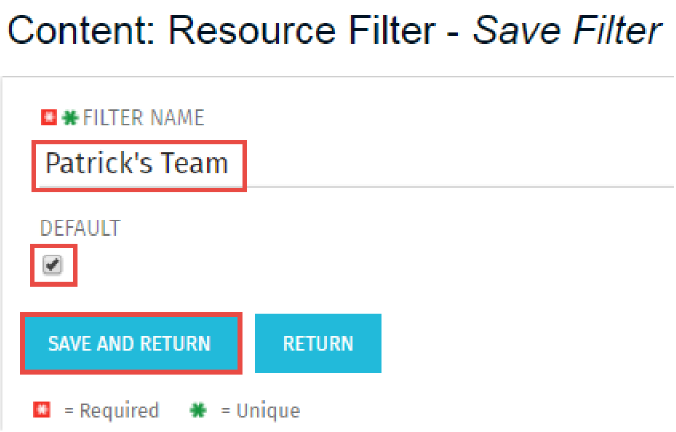
- Browse fields have auto-suggest functionality.
  - In this example the text “Va” has been entered in the Booking Manager field. Matches are available in the list. Select the correct name and click Filter.
  - Use the to remove an item from the selection.
- Use a filter or a combination of filters to find resources.
- Depending on your level of access you may see more or less resources when you access the resource list.

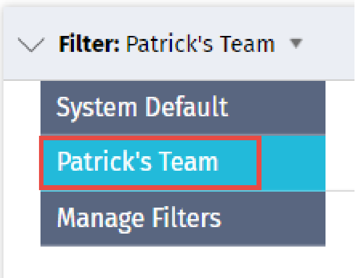


Saving a Filter

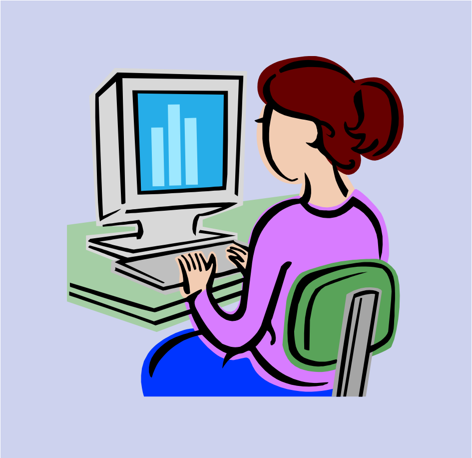
- To Save the filter for future use, click the Save Filter button.
- The Save Filter dialogue box appears.
- Name the filter. It is required and must be unique.
- If you would like this filter to be applied by default each time you visit this page, check Default.
- Click Save and Return.
- The filter is now available from the Filter drop-down.







Exercise - Review Resource Profile



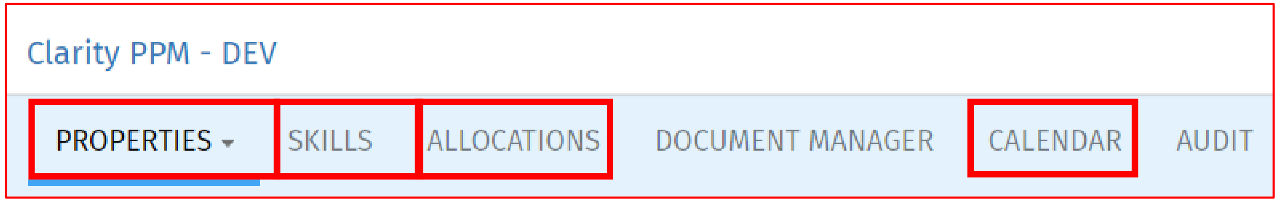
- Navigate to Home → Menu Links → Resource List → Resources.
- Expand the filter (if needed).
- Enter your filter criteria.
  - Clear the filter (using the Clear button).
  - Search for yourself in the Resource Manager search field.
  - Click Filter.
- Click Save Filter.
  - Enter the Filter Name (e.g. My Resources).
  - Click Default.
  - Click Save and Return.
- Click a name to access a Resource Profile.

  ** Note – if there are no resources who report to you, filter for yourself, and view your own resource profile.

Part 4: Resource Profile & Properties

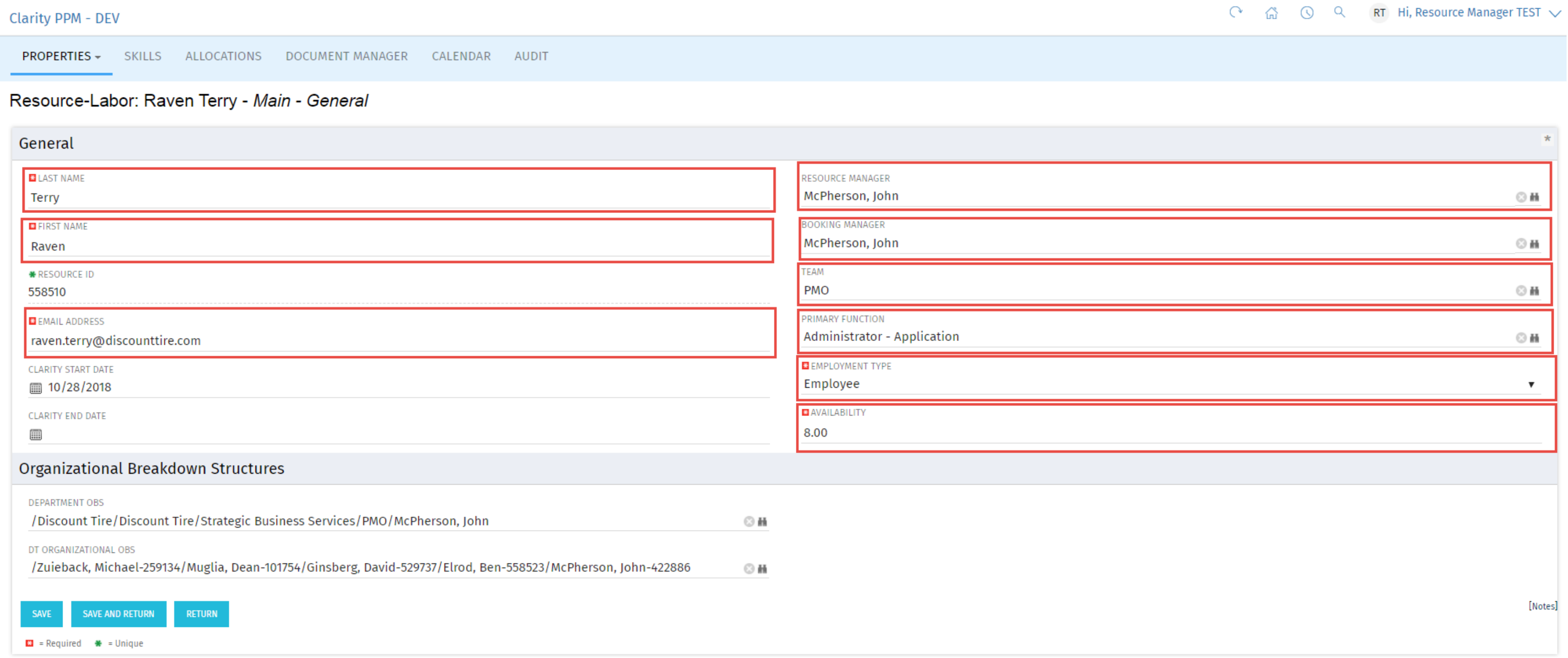
The Resource Profile

- In order for Resource Management to function appropriately, it is necessary for the fundamental resource data within Clarity PPM to be current and accurate at all times.
  - **Properties Tab** – Provides the detail that feeds into the overall functional capabilities of the resource (Primary Function & Team) and the amount of time the resource is able to work (Availability).
  - **Skills Tab** – Identifies the abilities of a resource to perform tasks within a project. (We are not using the list but you can use it if desired.)
  - **Allocations Tab** – The commitment of the resource to work a set amount of time on a project.
  - **Calendar Tab** – Aligned to the organization's holidays and planned days off. Determines days the resource is available to work on projects.



Resource Properties: Main – General

- Last Name – Resource Last Name
- First Name – Resource First Name
- Resource ID – Unique ID used for identifying the resource in Clarity PPM
- Email Address – Address to which Clarity PPM will send notifications
- Resource Manager – Can approve timesheets
- Booking Manager - Individual who is responsible for the resource's timesheet approval (if resource is on your team but has a different resource manager than you)
- Team – Name of Agile or Functional Team
- Primary Function - Classification for the type of work the resource performs on a project (e.g., Developer, Project Manager)
- Employment Type – Indicates whether the resource is an Employee or Contractor
- Availability – Number of hours that the resource is planned to work on a full business day



Tip: Depending on your level of access – you may have Read-Only access to Resource information.

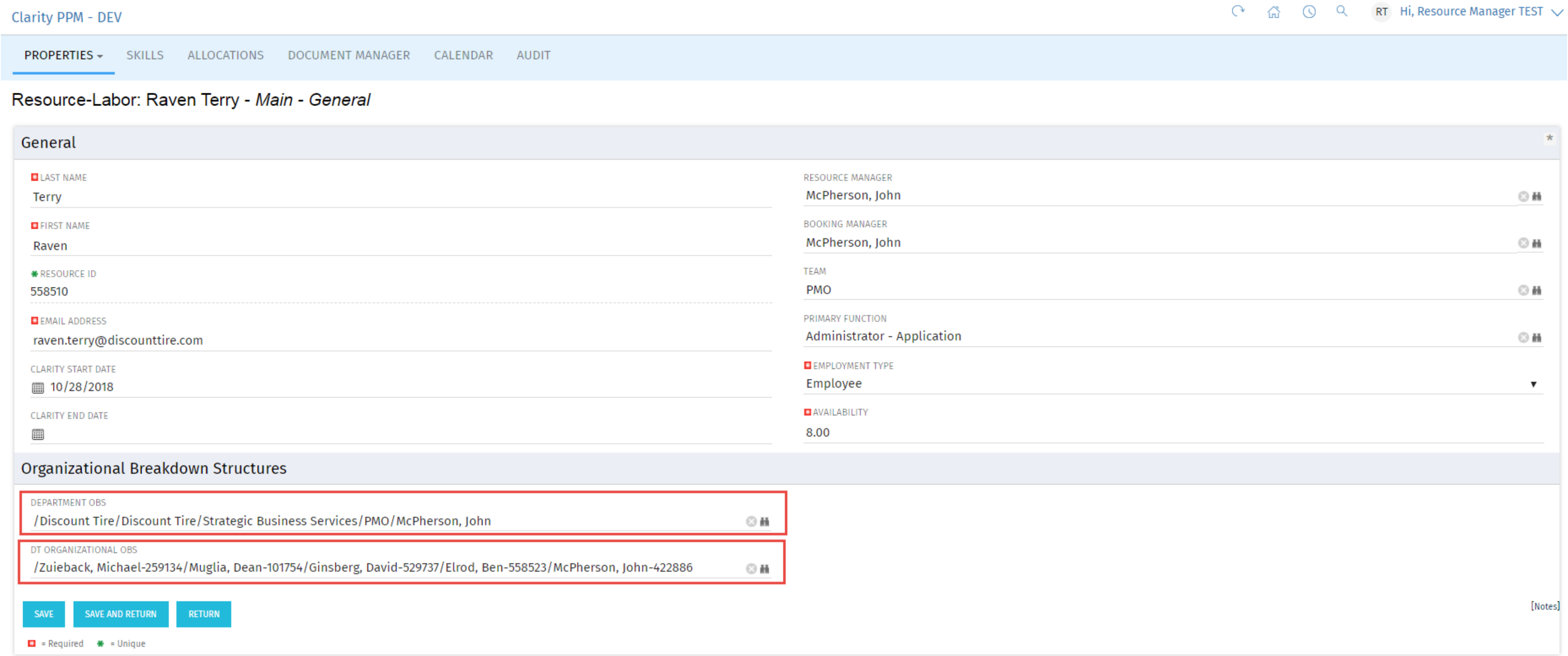
Resource Properties: Main – General

Organizational Breakdown Structure (OBS)

The OBS is a hierarchical structure that outlines the framework of the organization. Projects and Resources are 'attached' to levels within the OBS.

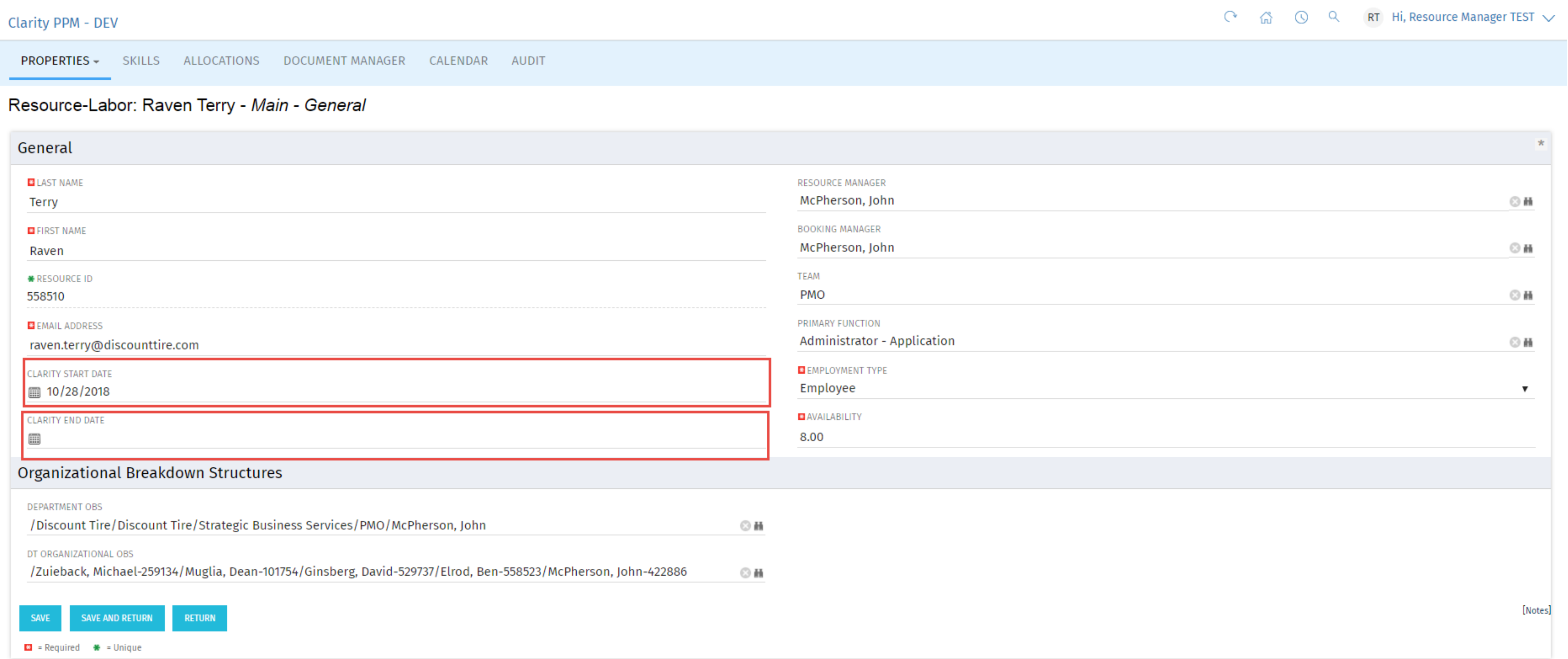
Discount Tire utilizes two OBS's for Projects and Resources:

- Department OBS – defaulted to "Discount Tire"
  - This then gets updated based off of the booking manager name.
- Organization OBS – Based on Manager/Direct reports



Resource Properties: Main – General

- **Clarity Start Date** – the first day the user is available for work in Clarity. This may not align to the first day you started at Discount Tire.
- **Clarity End Date** – the last day the resource is available for work in Clarity. This may not align to the last day you are at Discount Tire.



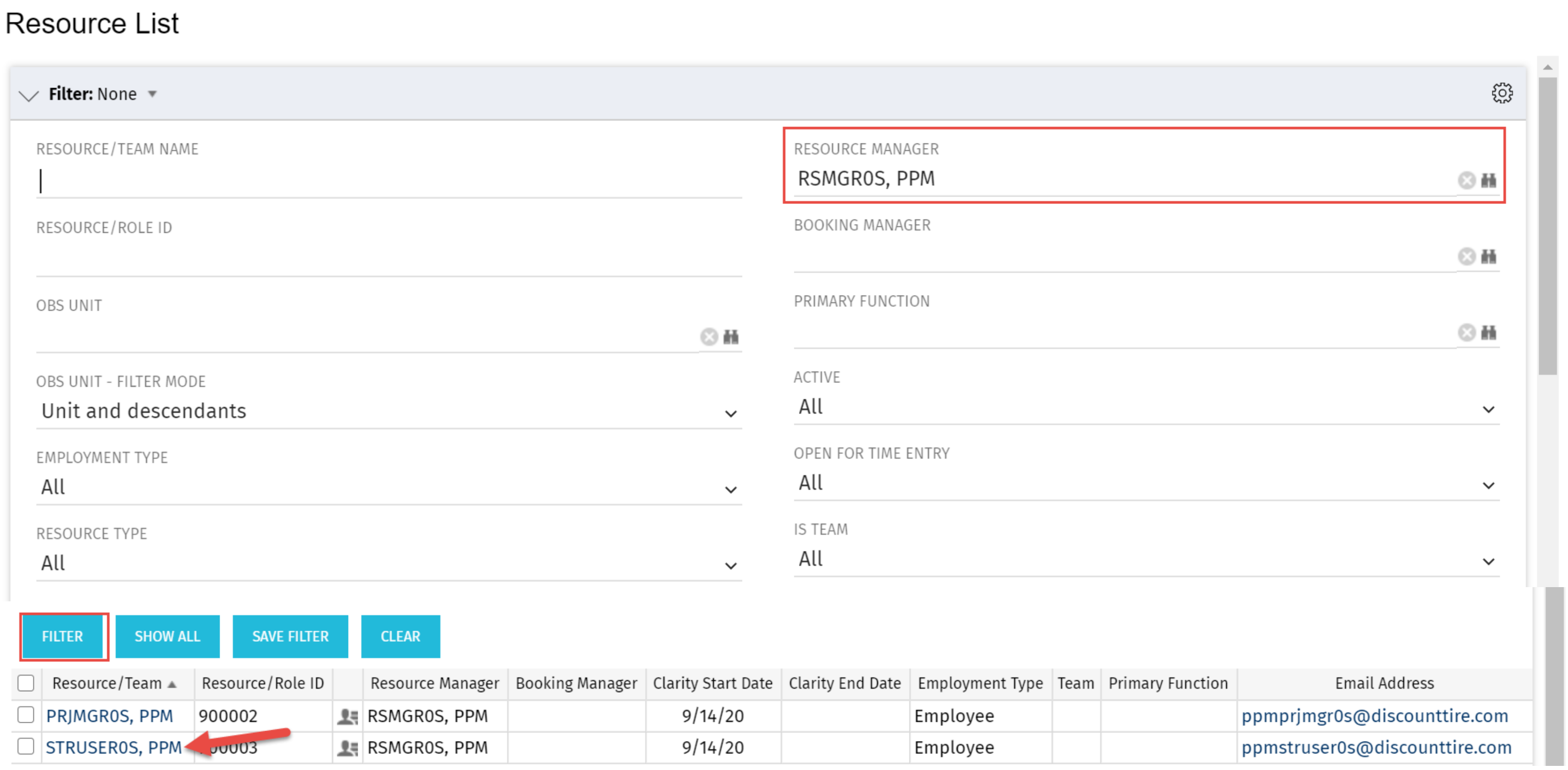
Part 5: Resource Calendar

Resource Calendar

- The Resource Calendar is used to determine the days the resource is available to perform project-related work. It takes into account:
  - Weekends
  - Corporate Holidays
  - Vacation and long-term leave
  - Non-Planned time off does not need to be retroactively entered
- Resources are associated with a “Base” calendar within the system. The base calendar typically identifies corporate holidays as non-working days for a particular location or department in an organization.
- The resource then maintains their personal calendar by adding additional personal non-working days, thereby presenting a total picture of the resource's individual availability.

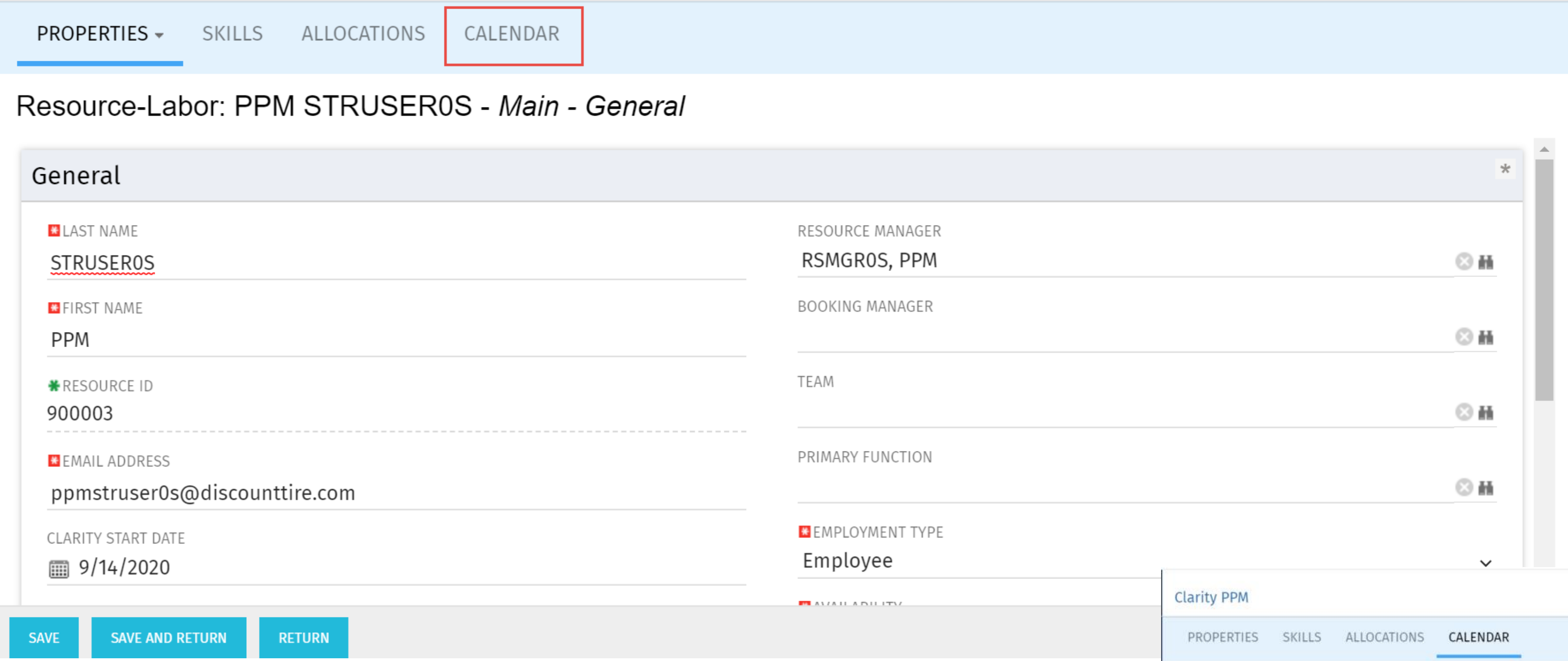
Updating Resource Calendar

- To access your resources’ calendars, you will search for them in the Resource List.
- Once they are populated, click the resource’s name to open their properties.

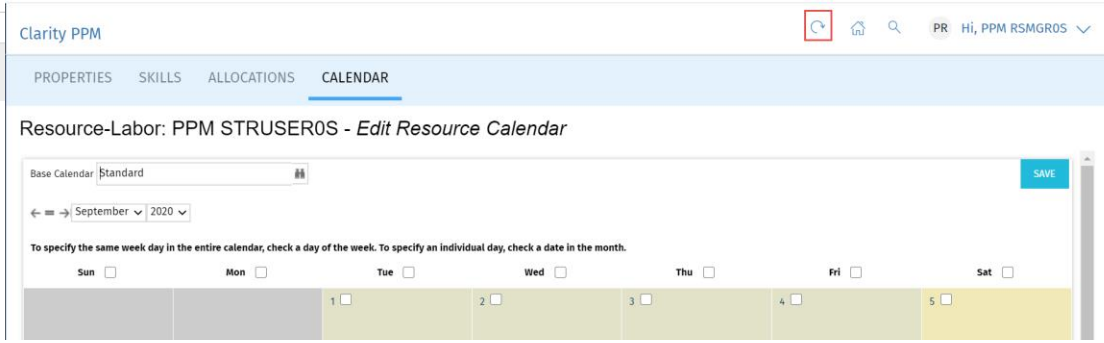


Updating Resource Calendar

- Select the Calendar tab

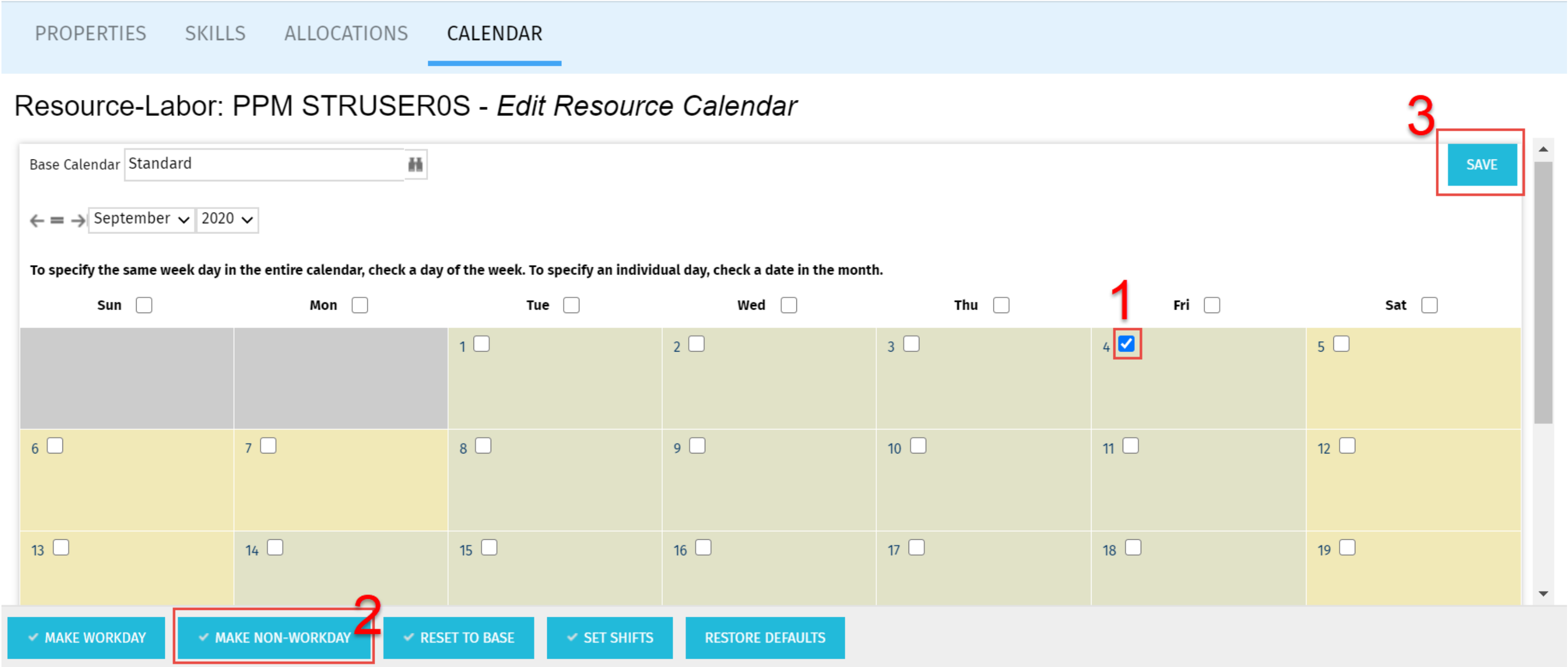


Note: If the calendar does not load, click on the Refresh button on the top right of the screen. This should load the calendar.

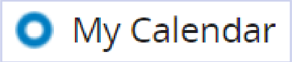


Updating Resource Calendar

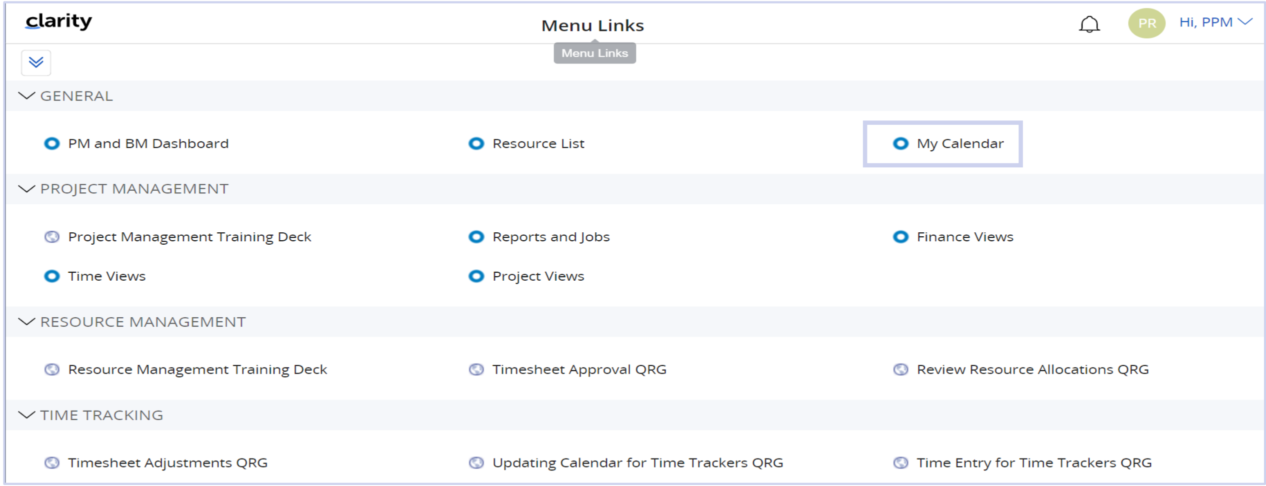
- To navigate within the calendar, use the arrows or the month and year drop downs.
- (1)Click the checkbox(es) and click (2)Make Non-Workday to designate additional days as non-working day(s).
- Click on the (3)Save button once you have completed marking the resource's planned days off.

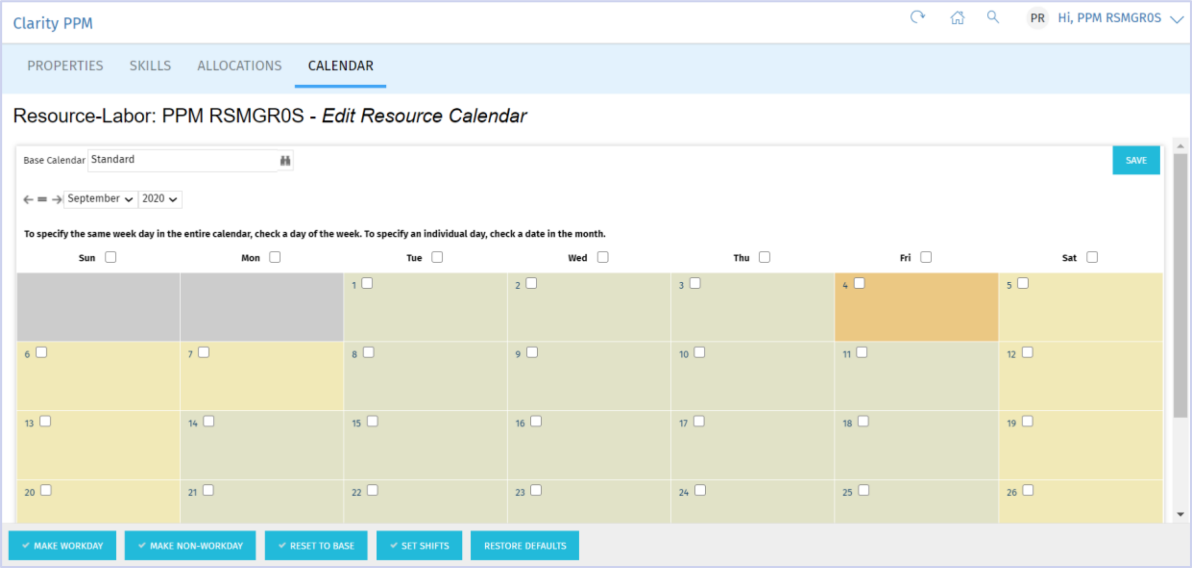


Personal Calendar Maintenance

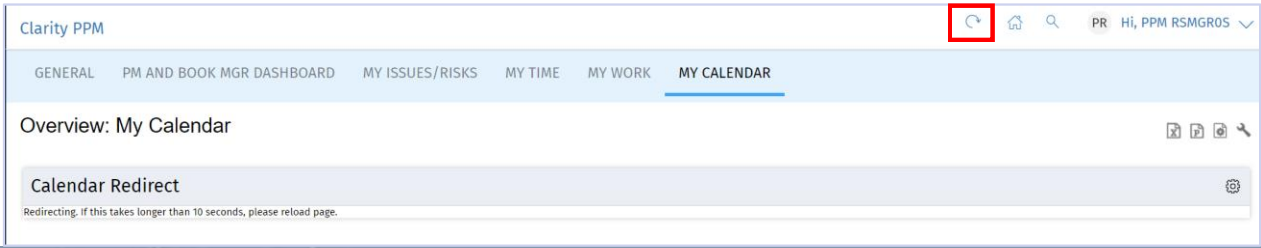
- On the left-hand side navigation, select the Menu Links icon. 
- Under the "General" drop-down arrow, click on 

. This will bring you into your Calendar in classic Clarity PPM.



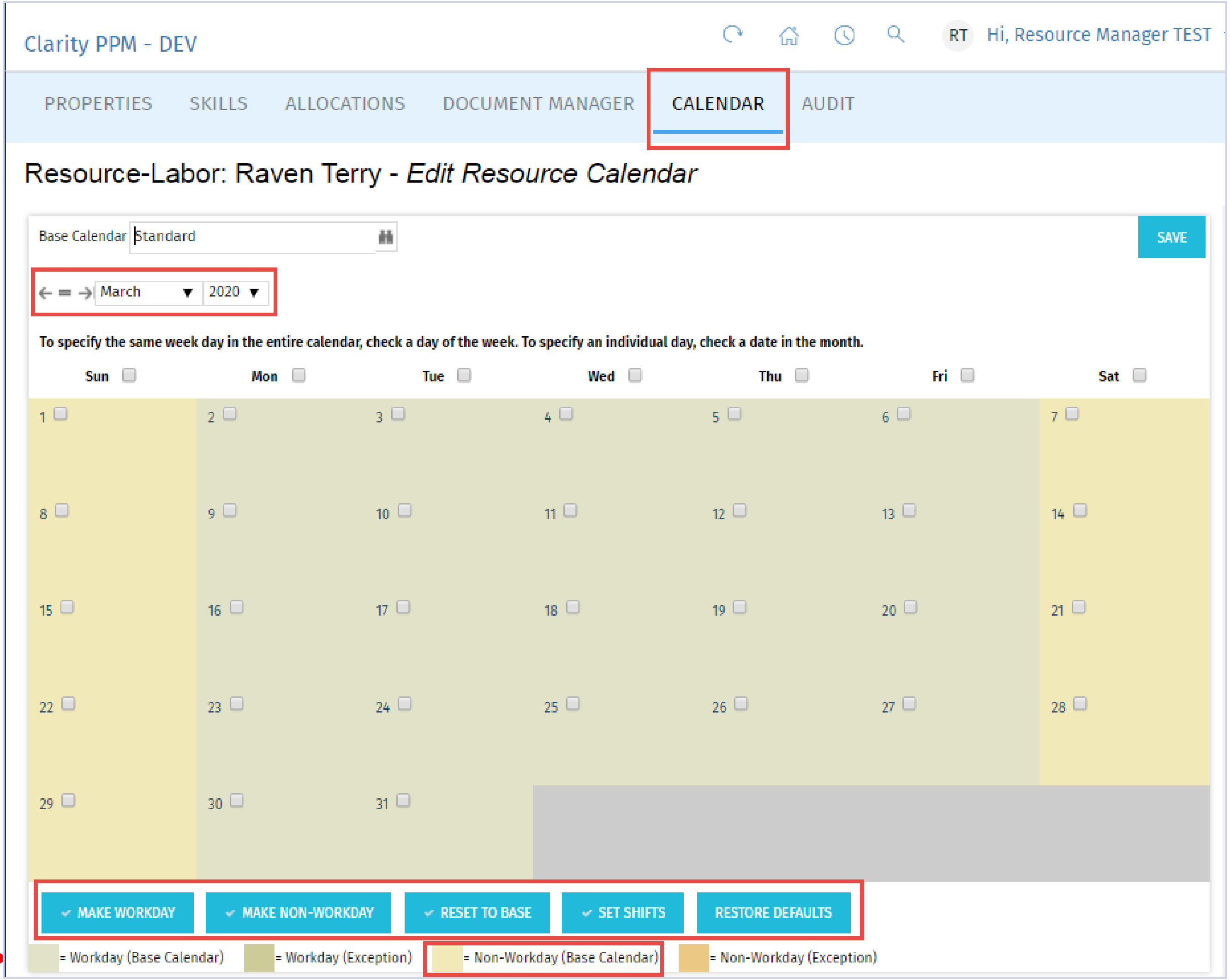


Note: If the calendar does not load, click on the Refresh button on the top right of the screen. This should load the calendar.



Personal Calendar Maintenance

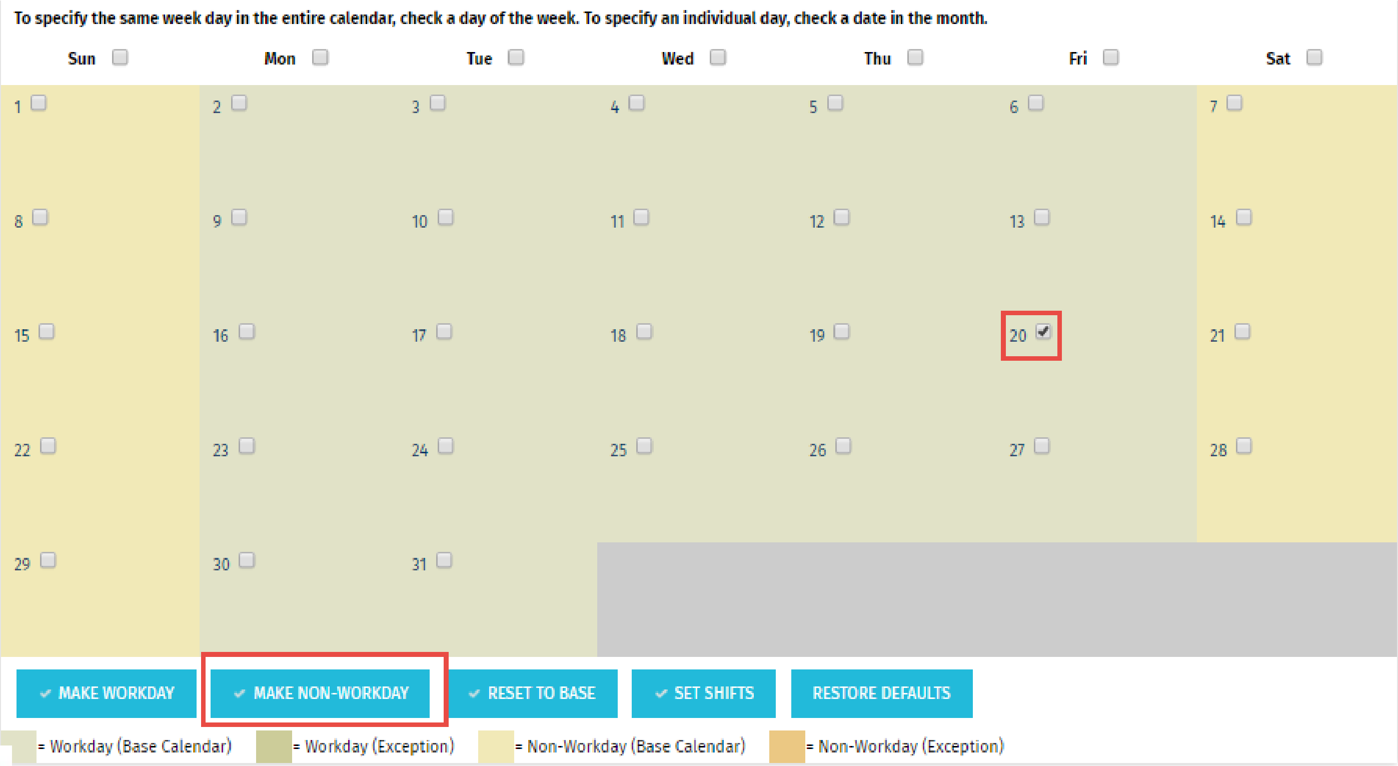
- To navigate within the calendar, use the arrows or the month and year drop downs.
- Corporate holidays and weekends have already been marked as non-working days in the base calendar.



Tip: Legend is located at the bottom of the calendar

Personal Calendar Maintenance

- Click the checkbox(es) and click Make Non-Workday to designate additional days as non-working day(s).
- Click on the Save button once you have completed marking your planned days off.



Tip: Non-working day(s) are also shaded on the resources timesheet

Resource Calendar Definitions

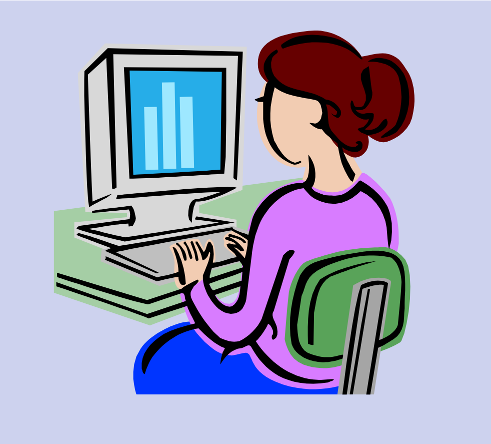
MAKE WORKDAY | MAKE NON-WORKDAY | RESET TO BASE | SET SHIFTS | RESTORE DEFAULTS

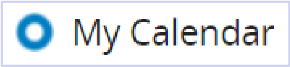
- **Make Workday** – Changes planned days off, weekends and corporate holidays to work days.
- **Make Non-Workday** – Used for identifying planned days off.
- **Reset to Base** – Updates selected items back to base calendar setup.
- **Set Shifts** – Adjust timeframes that the resource is available for project work.
- **Restore Defaults** – Sets entire calendar back to Base Calendar.

= Workday (Base Calendar) = Workday (Exception) = Non-Workday (Base Calendar) = Non-Workday (Exception)

- **Workday (Base Calendar)** – Workday, as set by the base calendar.
- **Workday (Exception)** – Workday that was set by the user, overriding the base calendar holiday or weekend default setting.
- **Non-Workday (Base Calendar)** – Weekends and holidays designated by the base calendar.
- **Non-Workday (Exception)** – Planned time off entered by the user.

Exercise



- Go to My Calendar 

in Menu Links. 
- Mark the first week of the next month as non-work days.

Part 6: Teams vs Resources

Clarity PPM Team

- Team, Primary Function & Resource.
  - **Team**: Placeholder representing the need for a team's participation on a project.
  - **Primary Function**: – Represents the specific skill or role a project needs for a project. For example: Developer - Back End.
  - **Resource**: Named resource placed on a project to perform a function. For example: Beth Smith is assigned as the Project Manager, Jeff Taylor as the Developer and Jim Adams as the QA.
- **Teams and Primary Function** are used for planning purposes when a named resource is not readily known or a soon to-be-hired resource has not been designated. Once the named resource is determined, the Team is replaced on the project.

Utilizing Team

- **Team** is used when:
  - A named resource is not known.
  - Primary Function is added so more detail is known.
- Clarity PPM views **Team** on the project team as demand .
  - The team, by definition, does not represent an actual person that will perform the activities on the project.
  - Clarity PPM designates this as Unfilled Demand

Allocation of the Resource

- Once the Resource has been added to the project team - allocation needs to be updated by the Project Manager based on discussion with the Resource Manager.
- **Allocation** of a resource occurs at the project level. Allocation represents the resource manager's overall level of commitment of the resource to the project.
- **Assignment** of a resource occurs at the task level. The project manager assigns resources to particular tasks on the project.
  - Assignments can only occur AFTER the resource has been added to the team tab.

Identifying a Resource to Replace the Team

- The team is allocated to the project as a generic placeholder on the project team.
  - The PM will replace the team, and each of its assignments, with the named resource.
  - The named resource inherits the Start-Finish dates and % Allocation that were associated with the role.
- The unfilled demand established by allocating the team will become ‘filled ’ by the commitment of the named resource to the project.
- If the named resource has a different primary function than the role that is being filled on the project, leave the resource’s primary function that is assigned on the resource record.

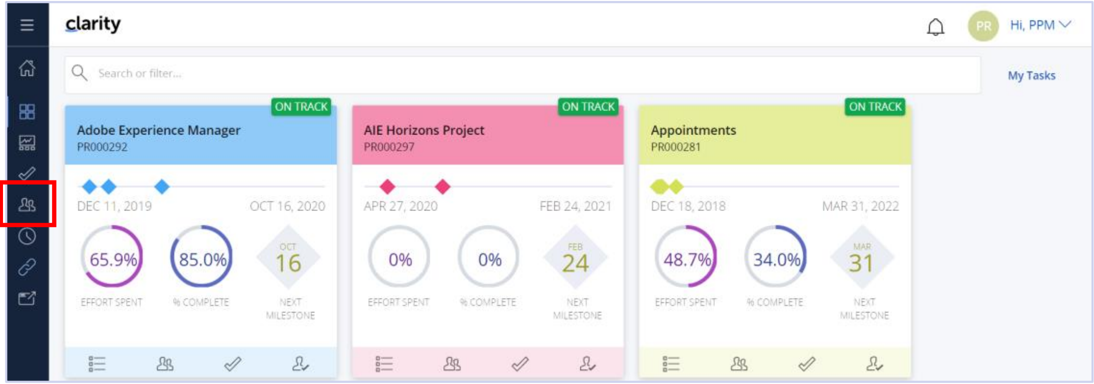
Part 7: Resource and Team Allocation

Allocating Resources to Projects

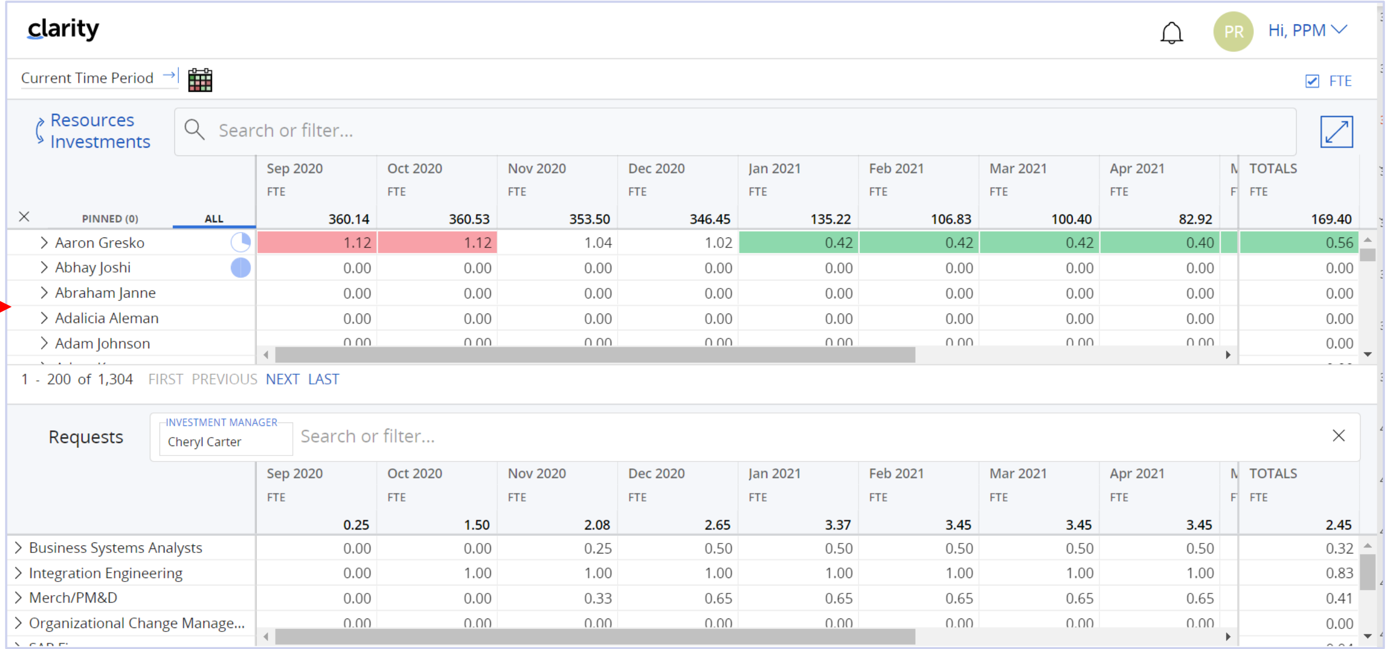
- Resources will be allocated to one or more projects on which they will perform work.
    1. Project Managers and Resource Managers will coordinate to identify the team member(s) that will work on that project and agree upon an allocation for the identified resource(s).
    2. Project Managers will then add the identified resource(s) to their project team in Clarity PPM and enter in the agreed upon allocation percent.
    3. The Resource Manager is responsible to enter operational allocations on the Staffing page.
    4. The below instructions will guide you to review your team's project allocations and set operational allocations as a Resource Manager.

Accessing Team Member Allocations

- Select the Staffing icon to access the list of resources' allocations.



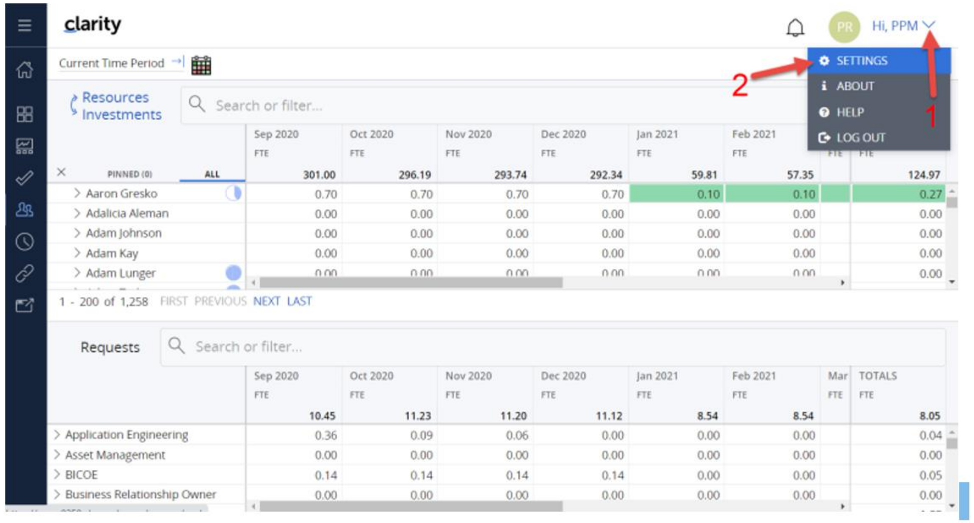
- You will land on this screen.

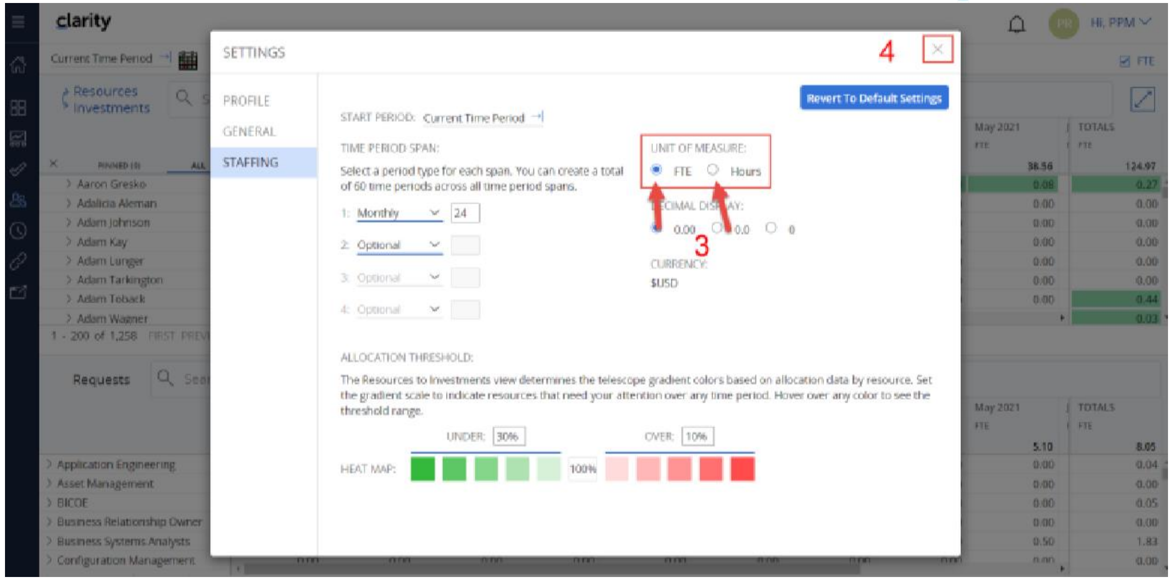


Team Member Allocations

FTE or Hours View Settings:

1. If you would like to see allocations with the Full Time Equivalent or the Hours view, select the drop down arrow next to your user name in the upper right hand corner.
2. Select Settings. SETTINGS
3. In the Unit of Measure section, select the radio dial button for the measure you would like displayed in the Staffing view.
4. Press the icon to close the window and return to the Staffing view



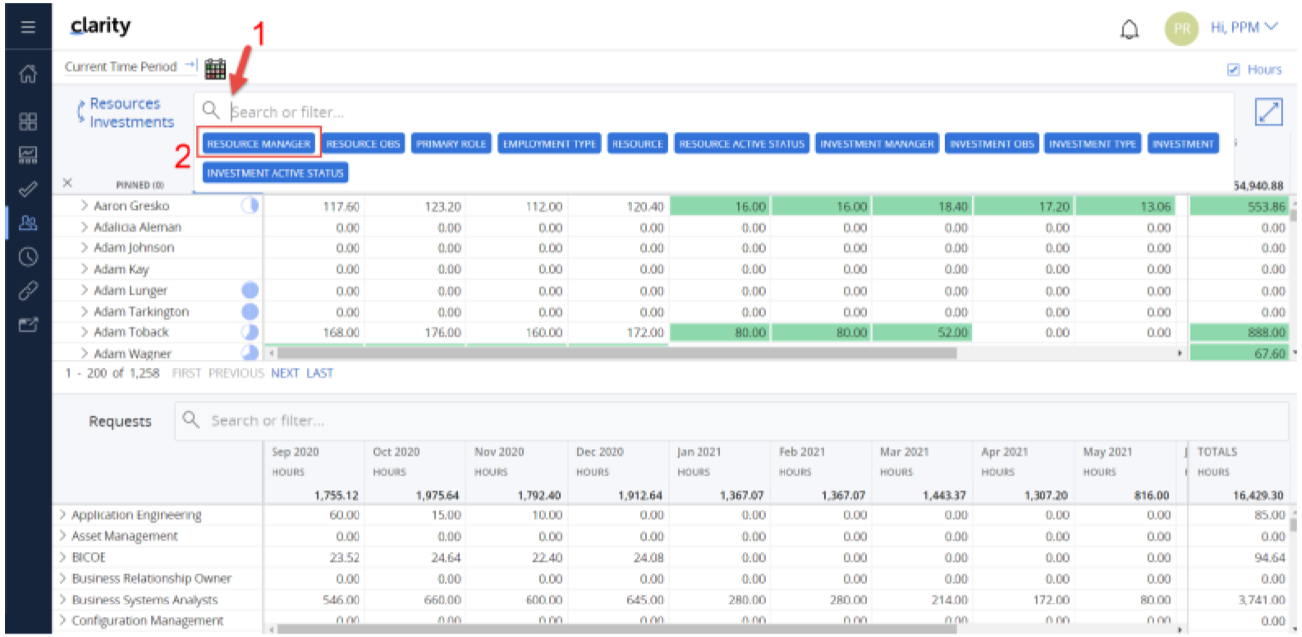


Team Member Allocations

Filter for your Resources:

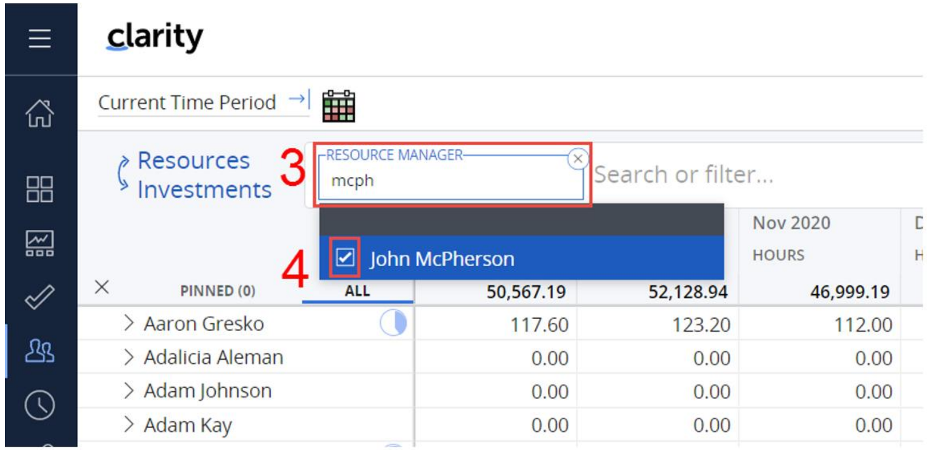
1. Click into the *Search or Filter . . .* field to show the different options to filter by.

2. Select the Resource Manager RESOURCE MANAGER option.



3. Start to type your last name until you see your full name appear.

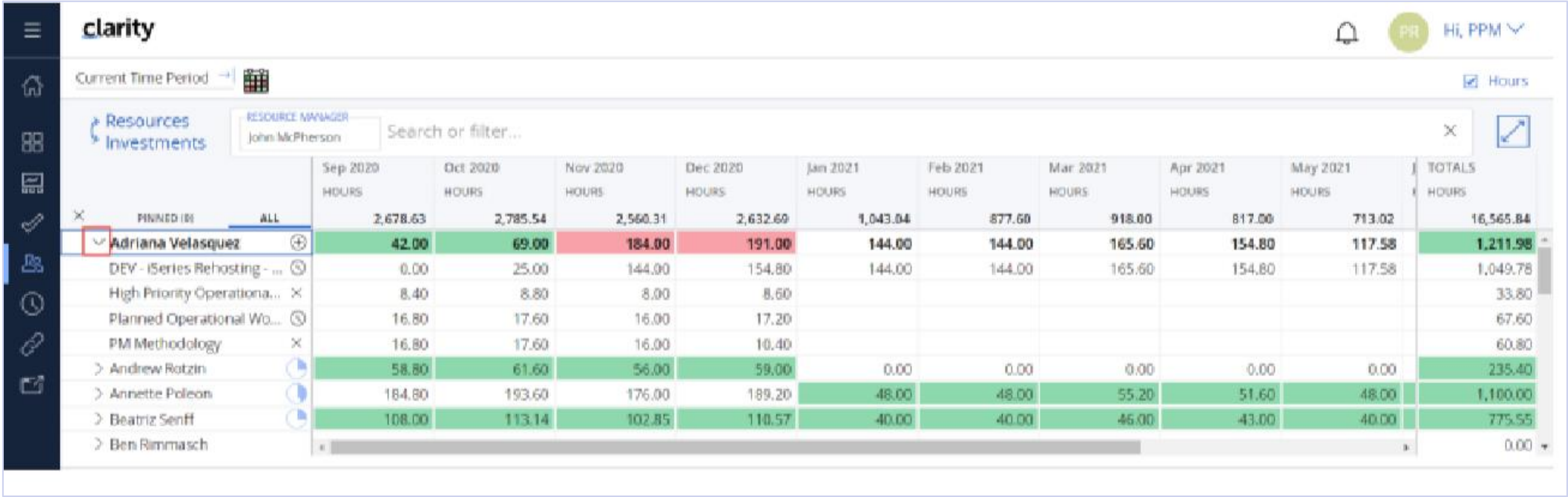
4. Select the check box next to your name.



Team Member Project Allocations

Review your Team's Allocations:

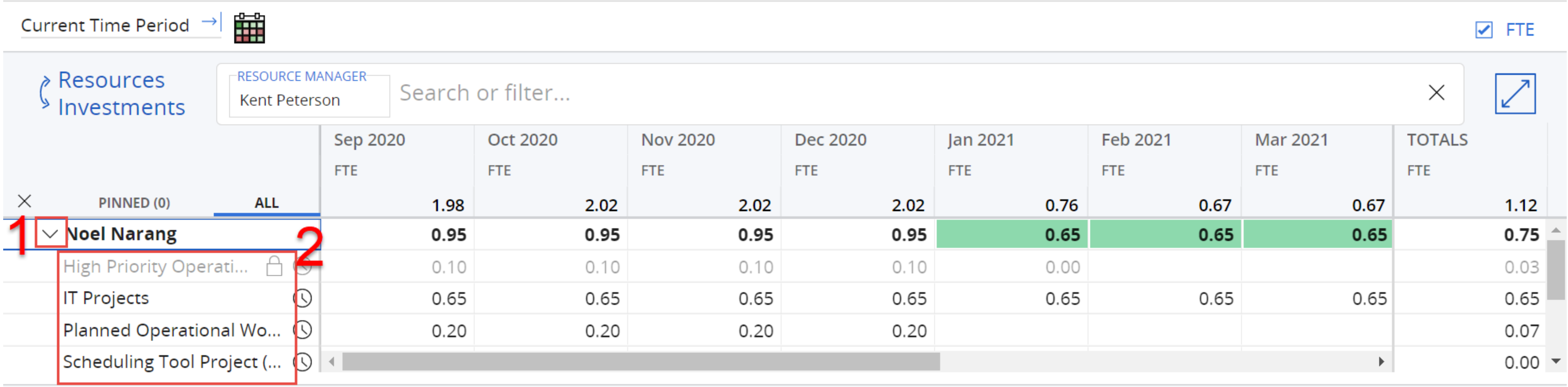
1. Select the drop down arrow in the front of each person's name to view each resource's projects to which they are assigned and their allocations.
2. If you see any concerns or have any questions with allocations or missing projects for your team, please reach out to the project manager to remediate.



Team Member Operational Allocations

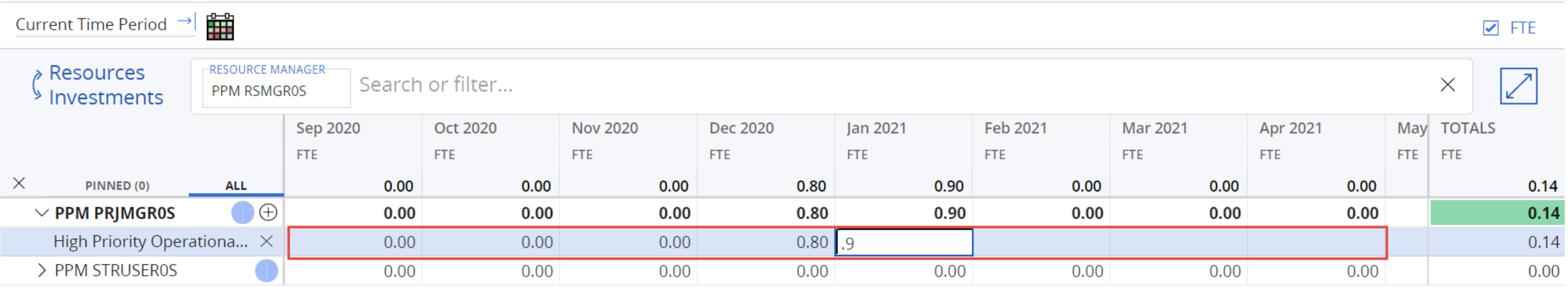
As you are reviewing each resource's project allocations, you can set their operational allocations directly in the Staffing page.

1. Select the drop down arrow next to the resource name for whom you want to review projects.
2. A list of projects will display underneath that resource's name.



Team Member Operational Allocations

- Click on the field for the month you need to set the allocation and update using an in-line edit.
- Only edit operational projects for your team.
- For any project allocation updates, please reach out to the project manager.



Part 8: Time Tracking and Approval

Timesheet Overview

- Clarity PPM's timesheet function is used to record actual hours spent on a task in a Project; as well as, non-project time (Other Work) such as operational, vacation, jury duty or medical leave.
- Time tracking provides data that drives project and portfolio reporting. It provides visibility into a project's progress and helps proactively identify risks.
- Timesheets are generated weekly, with the work week set for Sunday to Saturday.
- Once a time period is closed for time entry, it can only be reopened by the Clarity PPM Administrator.

Project vs. Non-Project Time

- **Report all project time** including hours worked in excess of your “regularly scheduled time” (typically 40 hours per week). Correctly reporting hours to the appropriate project tasks ensures that capital and expense are accurate on the company’s financial statements.
- **Report all non-project time:** Non-project hours include all ‘whirlwind’ non-project activities. Examples include time spent in non-project related department or staff meetings, Break-fix, PTO (Paid time-off) etc.

Time Entry Guidelines

- Create your timesheet at the beginning of each work week.
- Enter time each day to the correct project and task ensuring to also enter non-project time.
- Talk with the appropriate Project Manager(s) if tasks are not available on your timesheet. Also talk to your Manager regarding non-project work items.
- Key time in increments of 15 minutes (.25 hour). 30 minutes is entered as .5 hour.
- Save your time each day and submit for approval at the end of the work week.

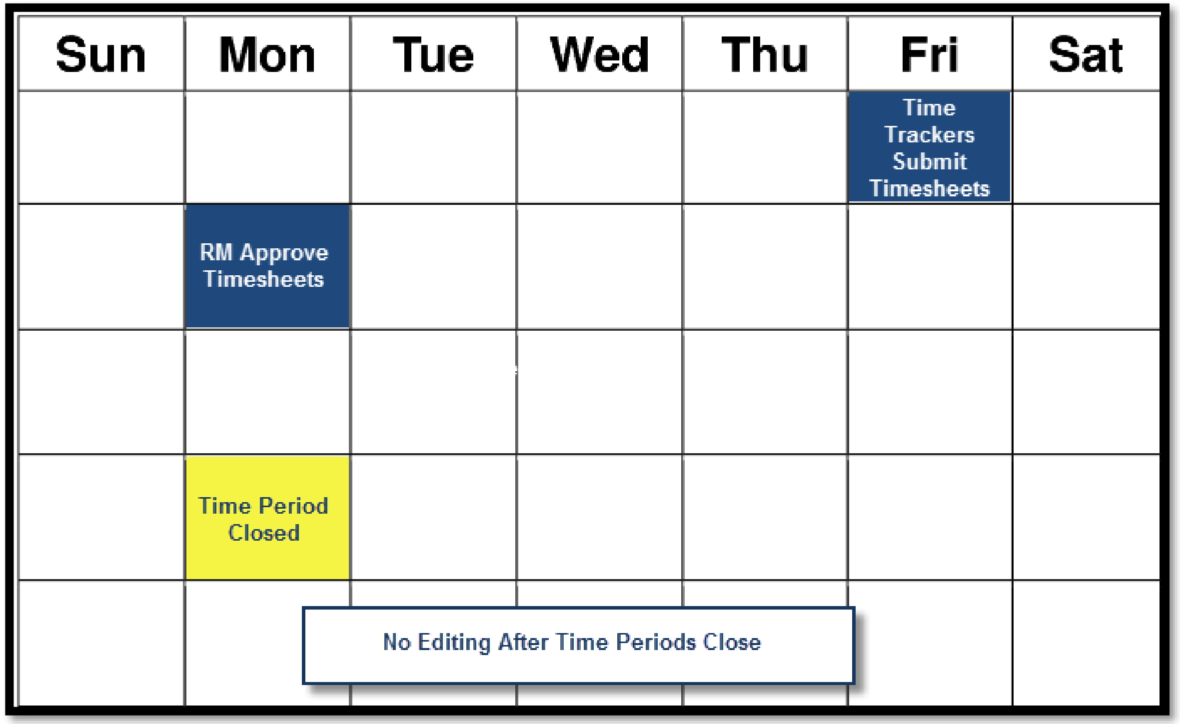
Time Entry Guidelines

- Timesheets submissions are due on Friday at 5 PM.
- Timesheet approvals are due Monday at 4 PM.

- Timesheets must be in Approved status in order to post to the appropriate projects and Other Work categories in Clarity PPM.

Time Entry Guidelines

- Timesheets are posted on Monday evenings.
- Timesheets are closed two weeks following the initial posting.
- Closed timesheets cannot be changed or edited in any way.



Time Entry Reminders

- Resource Reminders:
  - 5 PM Friday if the timesheet has not been submitted.
  - 9 AM Monday if the timesheet has not been submitted.
- Manager Reminders:
  - 9 AM Monday Summary of resources that have not submitted timesheets.
  - 4 PM Monday if timesheets have not been approved.
  - Optional: Every time one of your resources submits a timesheet.

Time Entry Reminders

Reminders for timesheets up to two weeks past due:

- **Resource Reminders**:
  - 1 week past due
    - 1st Reminder – 9 AM Monday: Sent to Resource (copy Booking Manager and Portfolio Manager)
    - 2nd Reminder – 9 AM Wednesday: Sent to Resource (copy Booking Manager and Portfolio Manager)
    - 3rd Reminder – 9 AM Friday: Sent to Booking Manager (copy Booking Manager's Director, Portfolio Manager and Resource)
  - 2 weeks past due
    - Final Reminder – 9 AM Monday: Sent to Booking Manager's Director (copy Booking Manager, Portfolio Manager)
- **Manager Reminders**:
  - 1 week past due
    - 1st Reminder – 9 AM Monday: Sent to Booking Manager (copy Portfolio Manager)
    - 2nd Reminder – 9 AM Wednesday: Sent to Booking Manager (copy Portfolio Manager)
    - 3rd Reminder – 9 AM Friday: Sent to Booking Manager (copy Booking Manager's Director, Portfolio Manager)
    - Optional: Every time one of your resources submits a timesheet.
  - 2 weeks past due
    - Final Reminder – 9 AM Monday: Sent to Booking Manager's Director (Copy Booking Manager, Portfolio Manager)

Accessing and Creating Timesheets

Creating Timesheets

1. Click the timesheet icon on the left navigation panel.

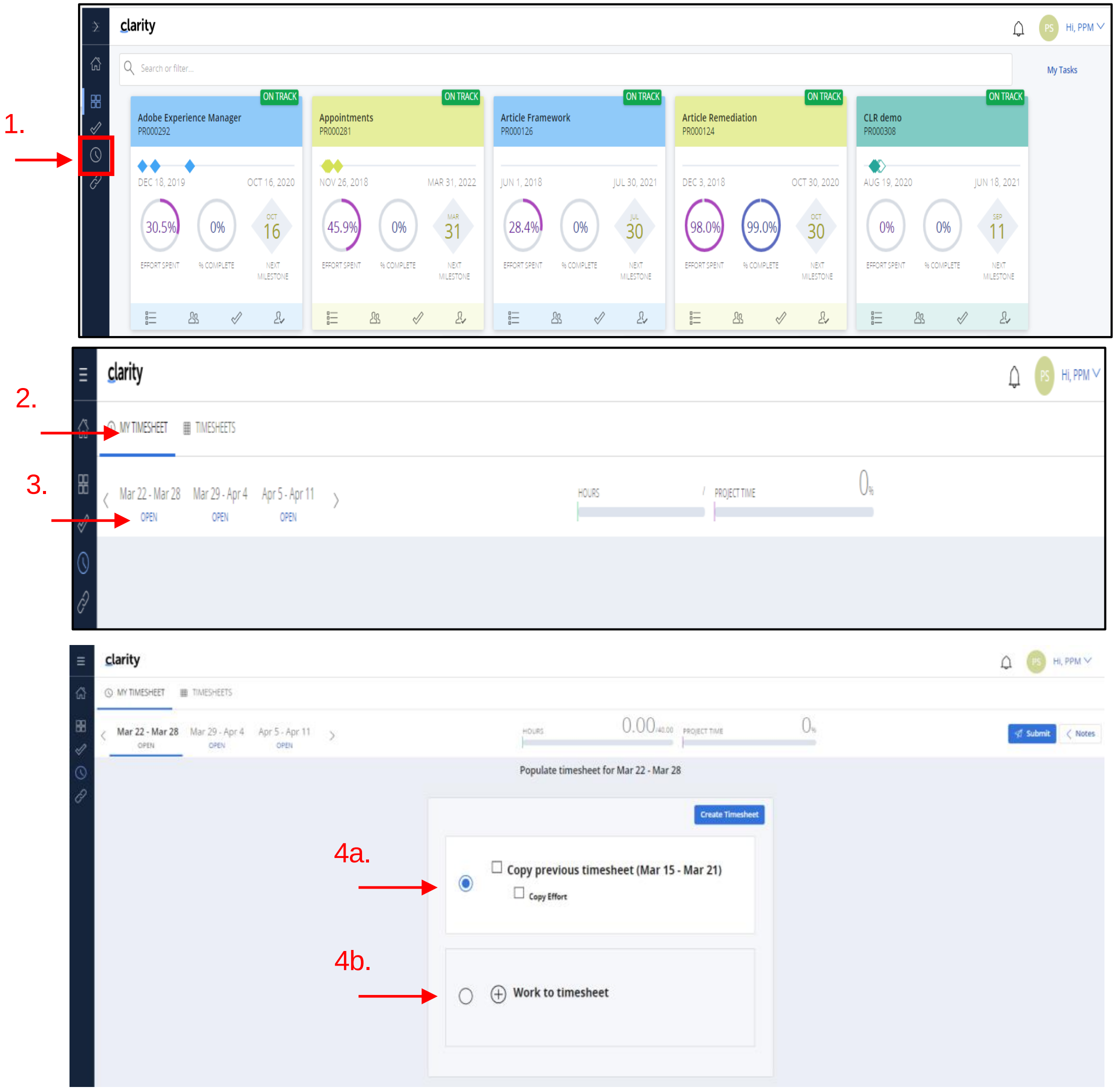
2. The Current Timesheet page will open.

3. Click on OPEN under the week of the timesheet you want to create/update.

4. You will be given an option:

   a. Click on the radio button to "Copy Previous timesheet (mmm dd – mmm dd)" then click on the check boxes, then click on "Create Timesheet".

   b. Click the radio button "Work in timesheet" then click on "Create Timesheet".



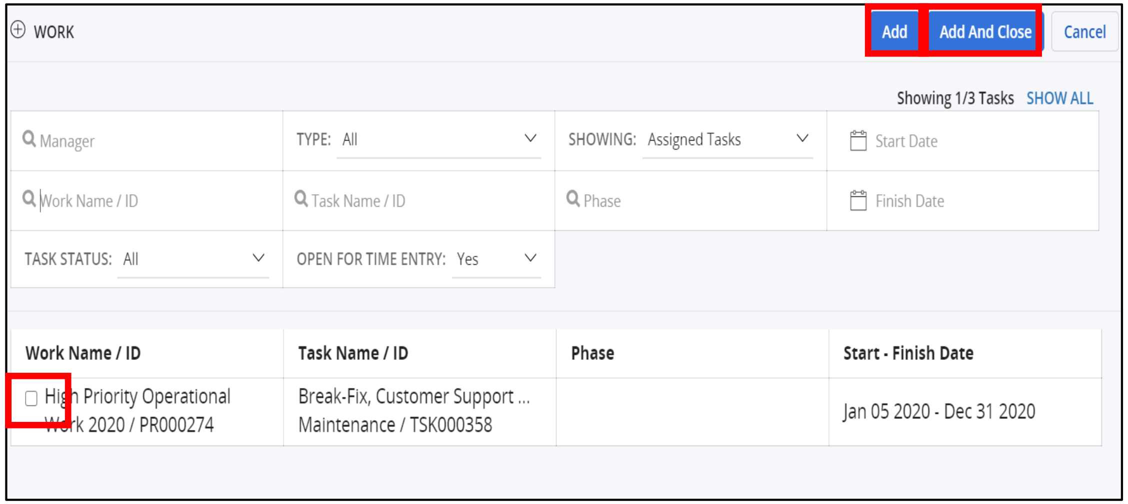
Adding Project Tasks to Timesheets

4a. Copy Previous timesheet – This will copy the previous week's timesheet with the same tasks that were entered last week and you can adjust as needed.

4b. Work in timesheet – This will create a new timesheet. The top section are filters you can use to find your assigned tasks. Click on the check box for the task(s) you want to add to the timesheet.

- Click on the checkbox next to the task that you want to add to the timesheet.
- Click on Add to add the task to your new timesheet and allow you to add more or search for additional tasks. OR
- Click on Add And Close to add the task(s) to your new timesheet and close the window.

NOTE: If there are tasks missing from this list, reach out the PM to add you to the project/tasks.

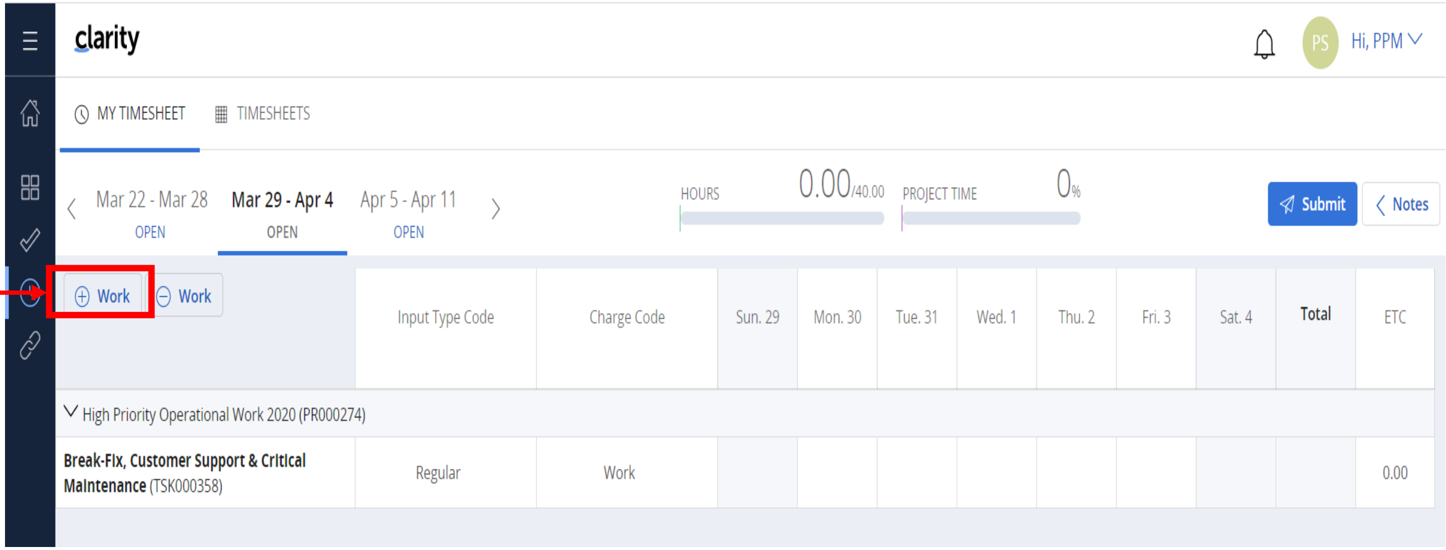


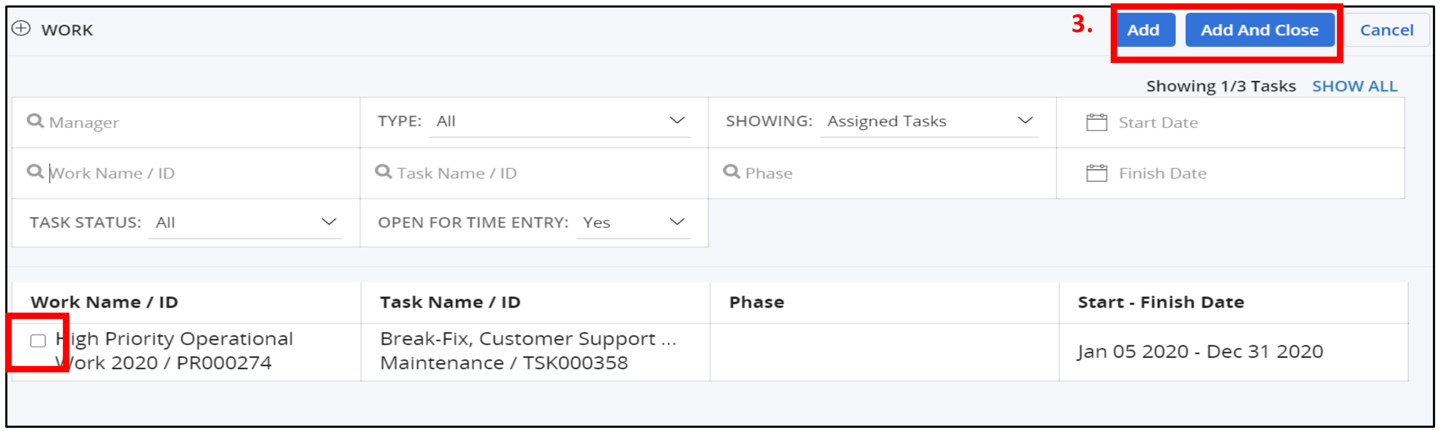
Add more Tasks Individually

To add more tasks to the Timesheet, click Work to open the task/filter page (see slide 75: 4b. "Work in timesheet")

1. Select the task by clicking in the box next to the task.
2. Click Add, or Add and Close if you have multiple pages.
3. The task is added to the Timesheet.

1.



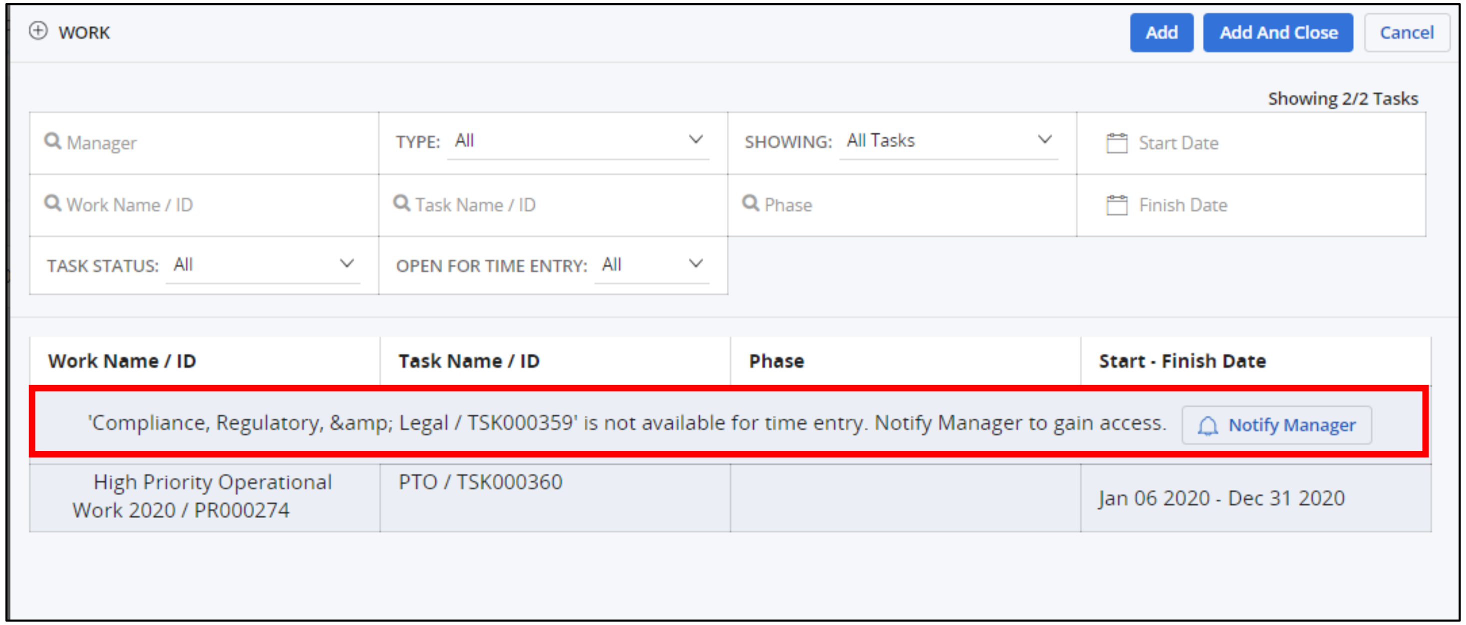


2.

Add more Tasks Individually

NOTE:

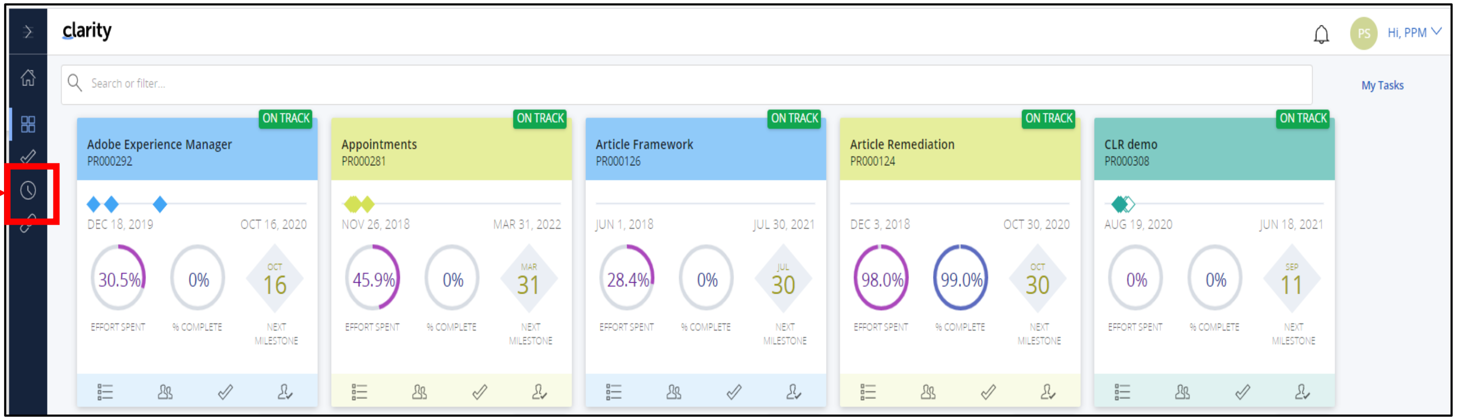
If a task has not been assigned to you, you can search for it, but may see a message with the Task name & task number followed by “is not available for time entry. Notify Manager to gain access.”. If you see this click on the provided button to request access.



View All Available Timesheets

1. From the Home page, click the timesheet (clock) icon  on the left navigation panel.
2. Click the Timesheets tab at the top of the page to **view** timesheets from all open time periods.

1.



2.

Timesheet Statuses

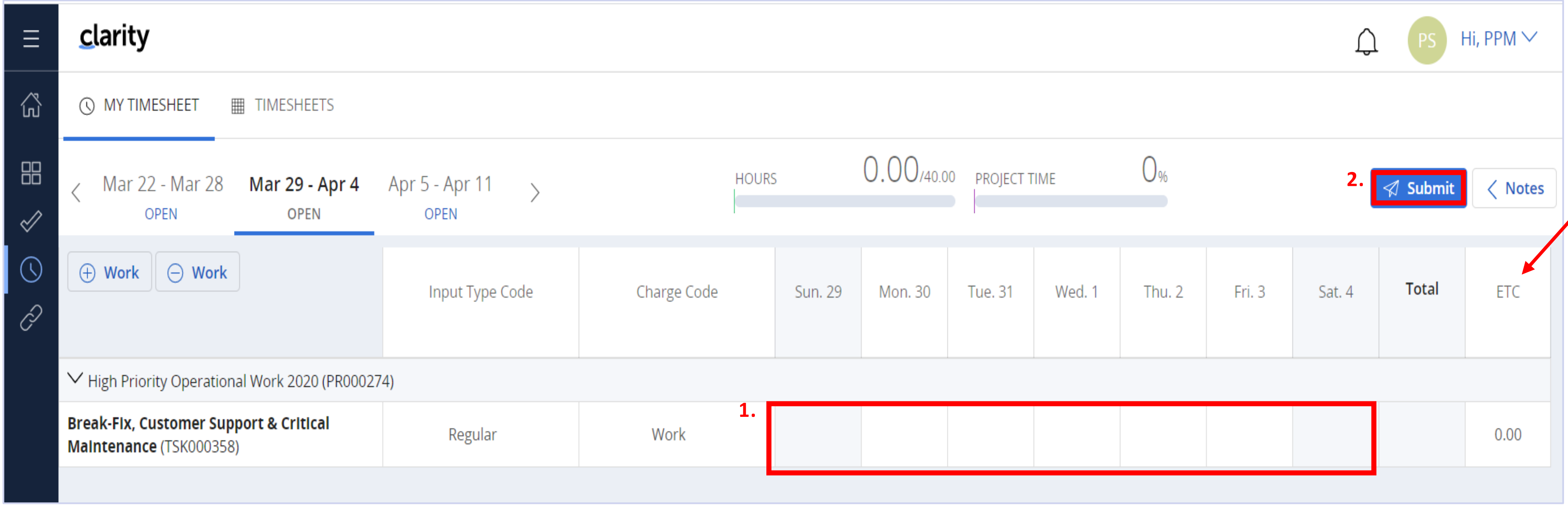
- **Open**: Timesheet has been created or entered but not yet submitted by the resource. *Open status also includes Returned timesheets*. Until the timesheet is approved, the time entry resource can edit the timesheet.
- **Submitted**: Timesheet submitted and ready for approval.
- **Approved**: Timesheet approved and ready to be posted.
- **Posted**: Timesheet posted via financial posting process and hours become actual effort on projects.
- **Returned**: Timesheet posted but rejected by approver and returned back to Resource for revisions (also considered to be "Open").

Entering and Submitting Time

- ✓ Entering Time
- ✓ Deleting a Task
- ✓ Using Timesheet Notes
- ✓ Submit for Approval

Entering Time

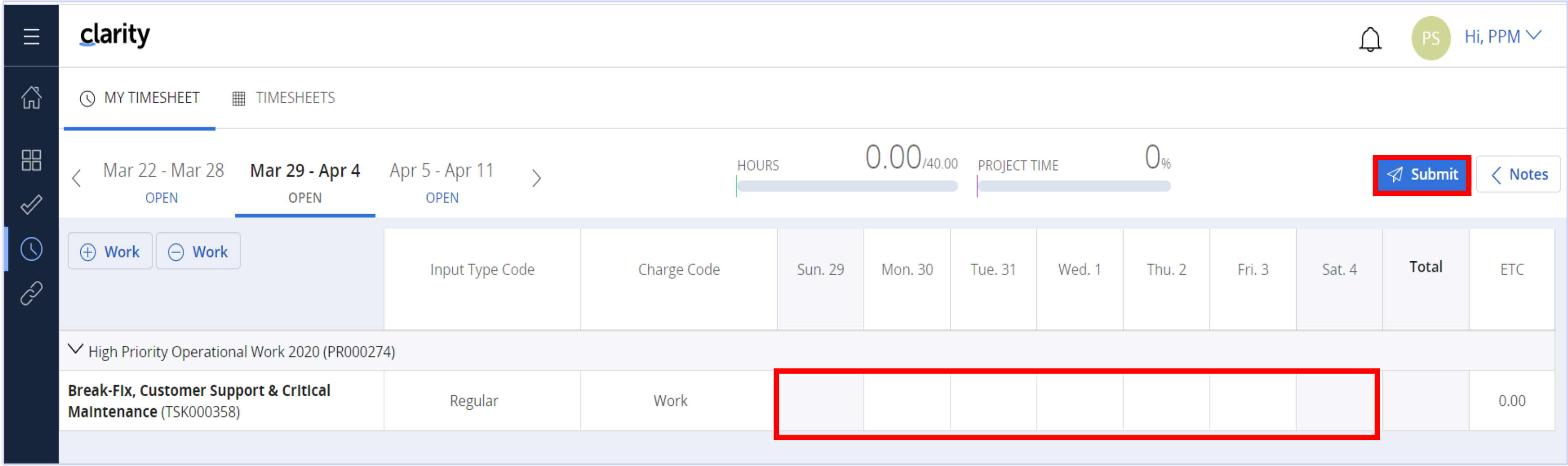
1. The timesheet has a cell for each task under each day of the week. **Enter hours under each day** for all of the projects you worked on that day.
2. Click **Submit** to record the hours to your timesheet.
3. Click **Cancel** to exit.



Tip: You can update the **Estimate to Complete (ETC)** field if needed.

Add Hours to Tasks

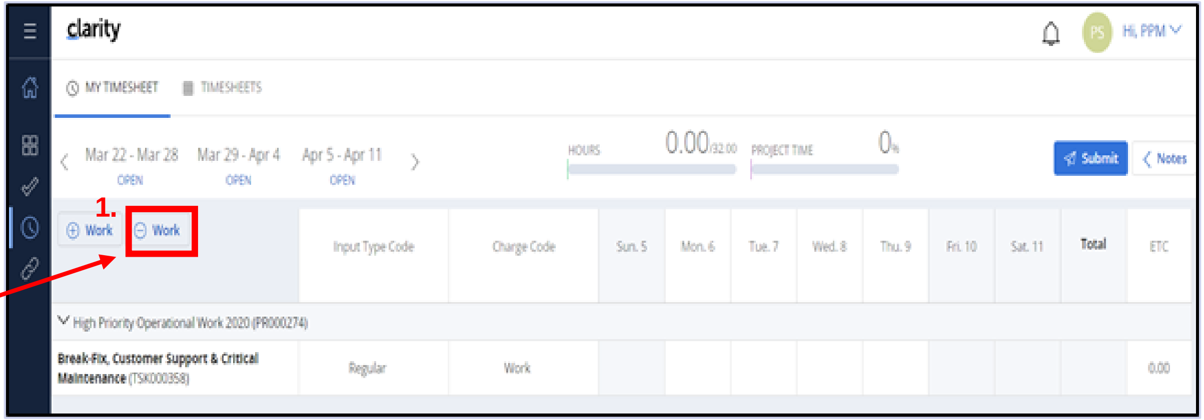
1. When the new timesheet is opened, it will include all the tasks that you added to the timesheet in 4b above.
2. From here add the hours worked on each task for each day.
3. When you have added all your hours, click on Submit to submit the timesheet for auto-approval.

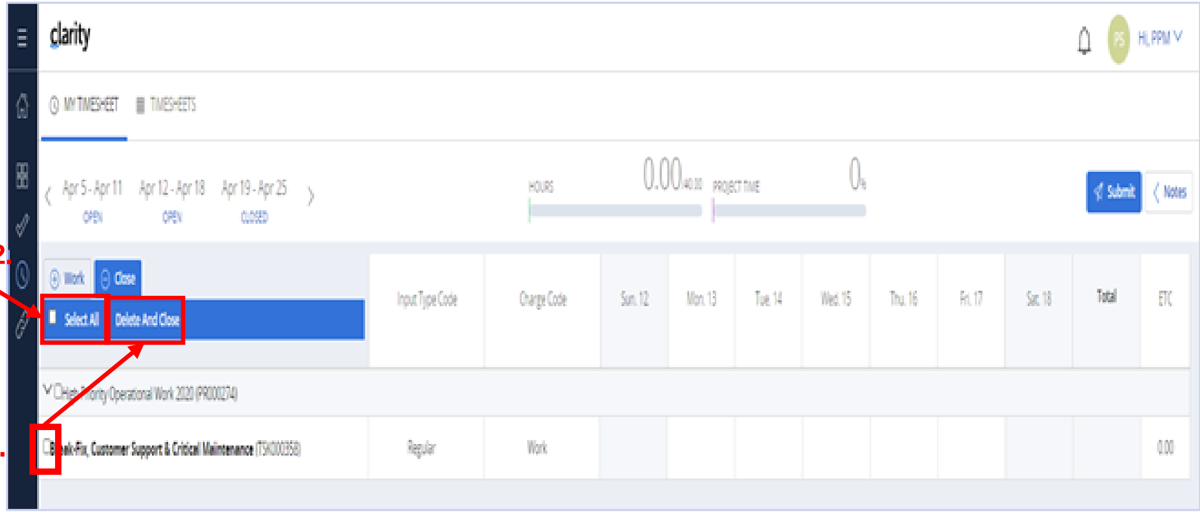


Deleting a Task

- When you delete a task from your timesheet, you are not deleting it from the project, you are simply removing it from your timesheet.

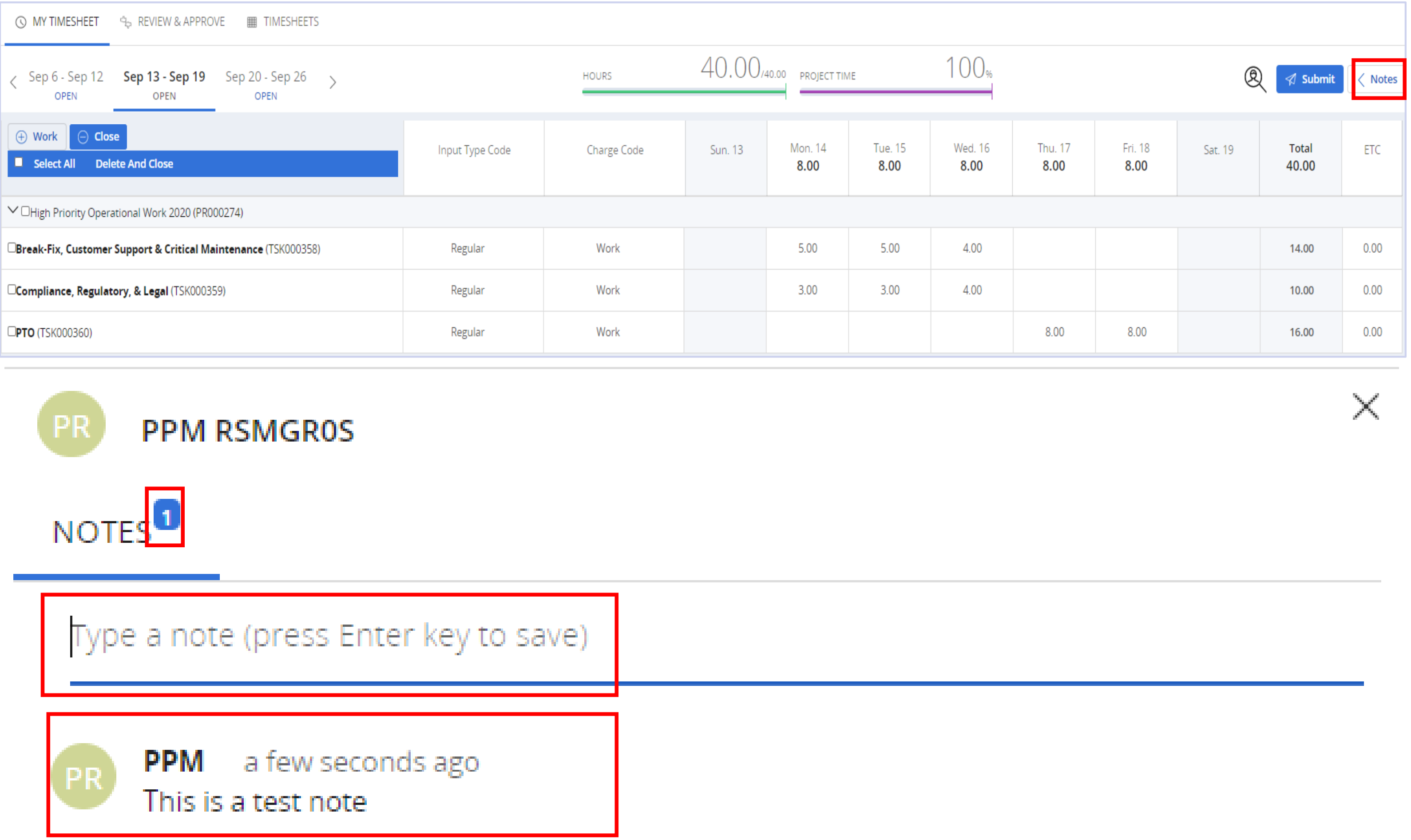
- To delete a task from the timesheet:
    1. Click on the “Delete work” icon. ⊖ Work
    2. Click on the Select All icon Select All to delete all tasks on the timesheet and close the “Delete work” box.
    3. Or you can click delete an individual task by clicking on the checkbox next to each task that you want to delete, then click Delete And Close which will delete the selected tasks from the time sheet and close the “Delete work” box.





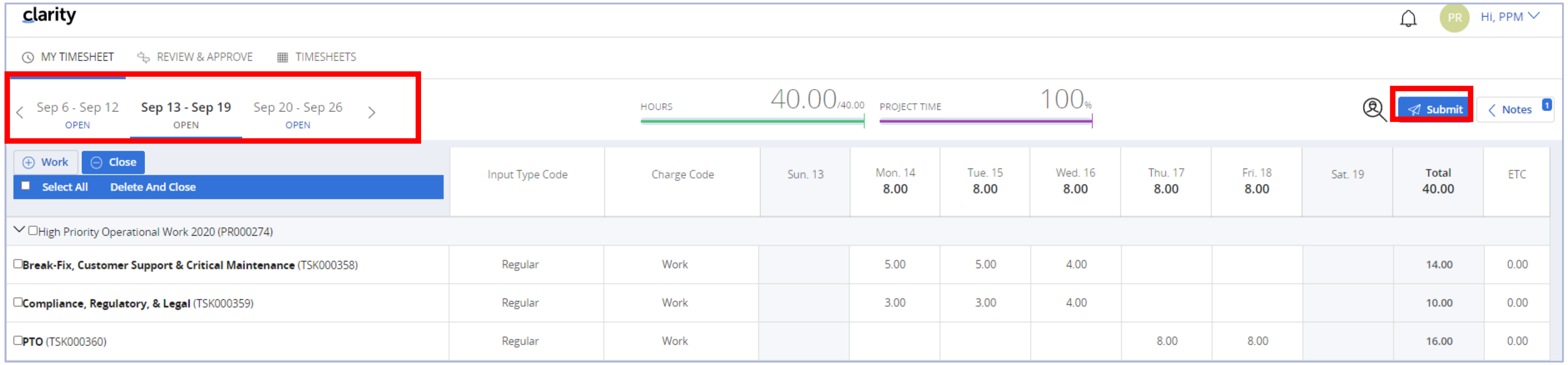
Using Timesheet Notes

- *Timesheet Notes* are generated by clicking on the Notes icon in the top right corner of the timesheet.
- Enter the **text of the note** in the **Note field**.
- Clarity PPM will show the number of notes for the timesheet and show all notes below the freeform text box.
- Click × to close the notes box



Submit for Approval

- Once you have entered time for the week, it is necessary to submit it for auto-approval.
- If you would like to view your submitted timesheet, go to that week's period



Timesheet Adjustments

- ✓ Overview of Adjustments
- ✓ How to Adjust your Timesheet
- ✓ How to return your team’s timesheets

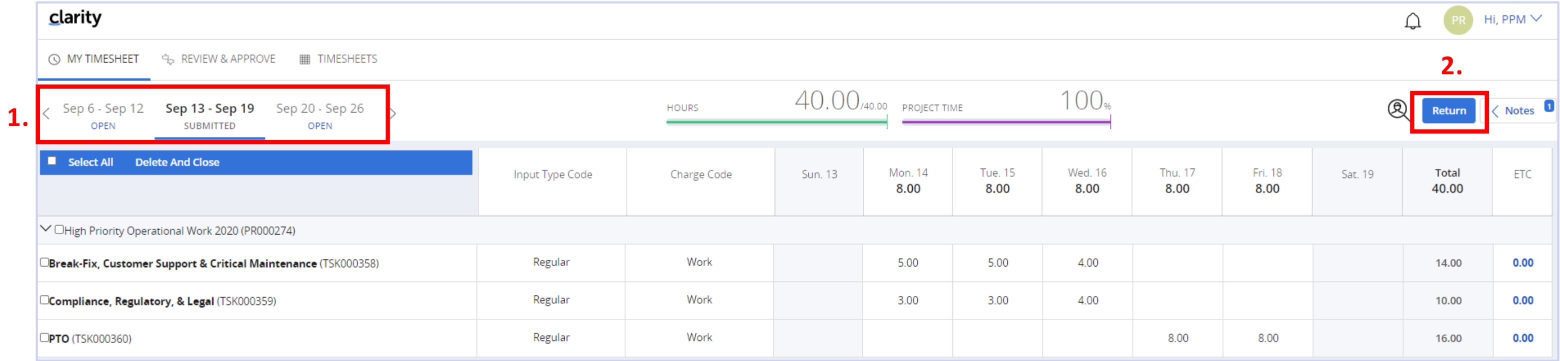
Timesheet Adjustment Overview

- Once the timesheet is posted, a timesheet adjustment must occur in order to update the timesheet.
- NO adjustments can be made after the time period is closed, which is two weeks after initial submission.
- By creating an adjustment timesheet, you are creating a copy of the original timesheet. Two versions of the timesheet will then exist: the original timesheet (Adjusted) and the new, modified timesheet (Adjustment).
- Adjustments are approved like regular timesheets for open time periods.
- Adjustment timesheets must be submitted in order to be reviewed and approved.
- Users can perform their own adjustments, or their Timesheet Approver can make the adjustment.

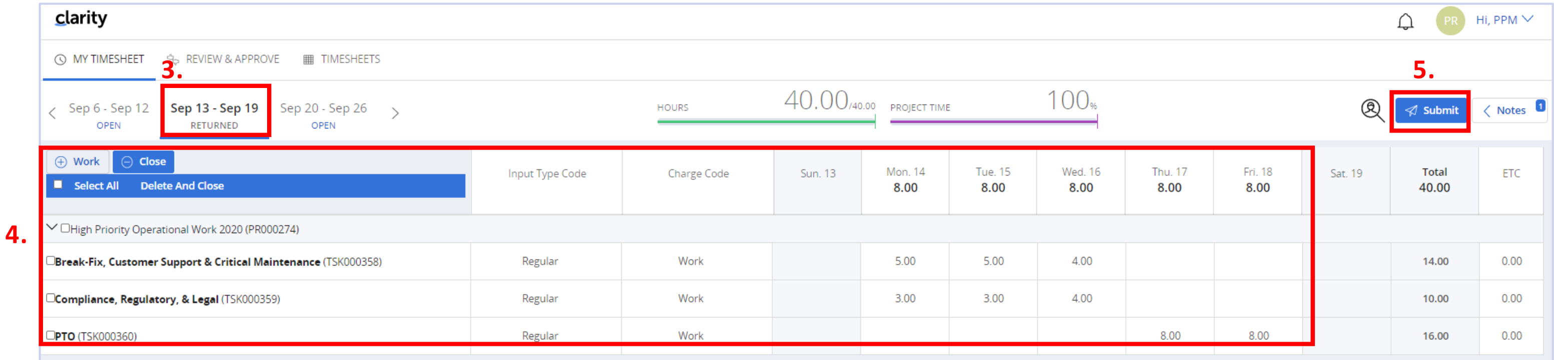
Returning a Timesheet for Yourself

If you made a mistake on your timesheet and would like to return it to yourself:

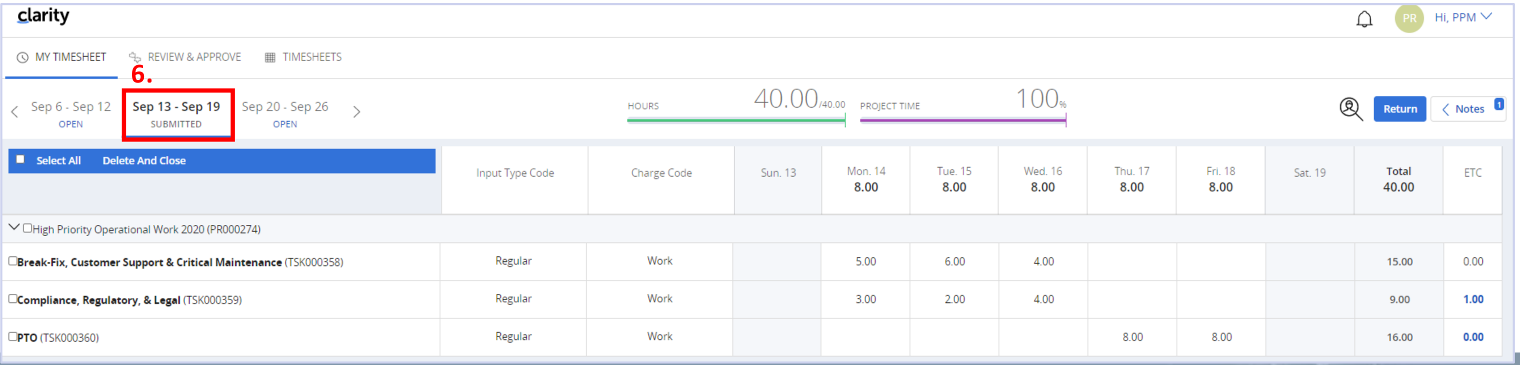
1. Click on the appropriate timesheet in the list to be Returned.
2. Click **Return** on the opened Timesheet.



3. Status will change to **Returned**.
4. Make adjustments to hours/tasks as needed.
5. Click **Submit** for auto-approval.

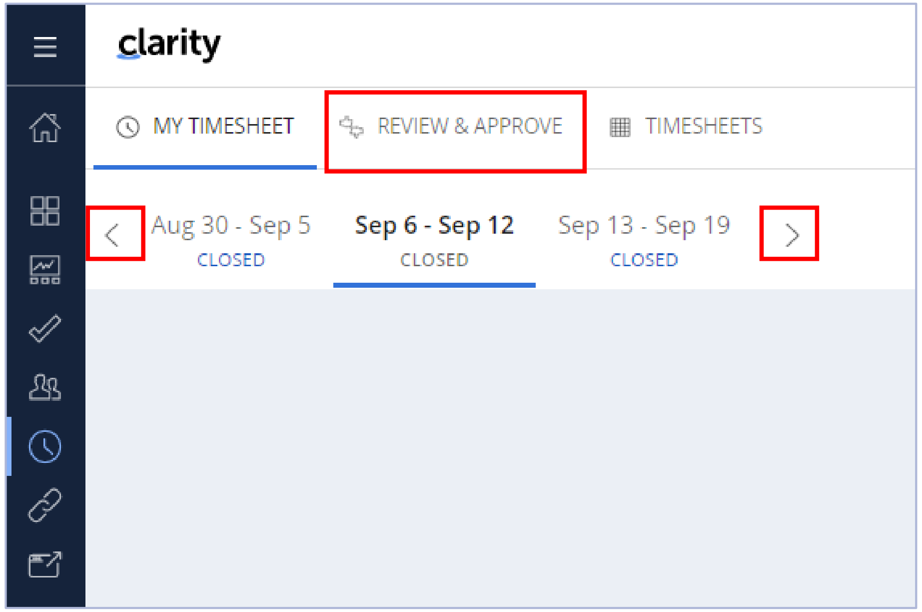


6. Status will change back to Submitted.



Returning a Timesheet to a Resource

1. Select the **Review & Approve tab** at the top of the page. Click on the **Time period** to be reviewed. NOTE: You may need to use the Left/Right arrows to scroll to the Time Period you want to review.

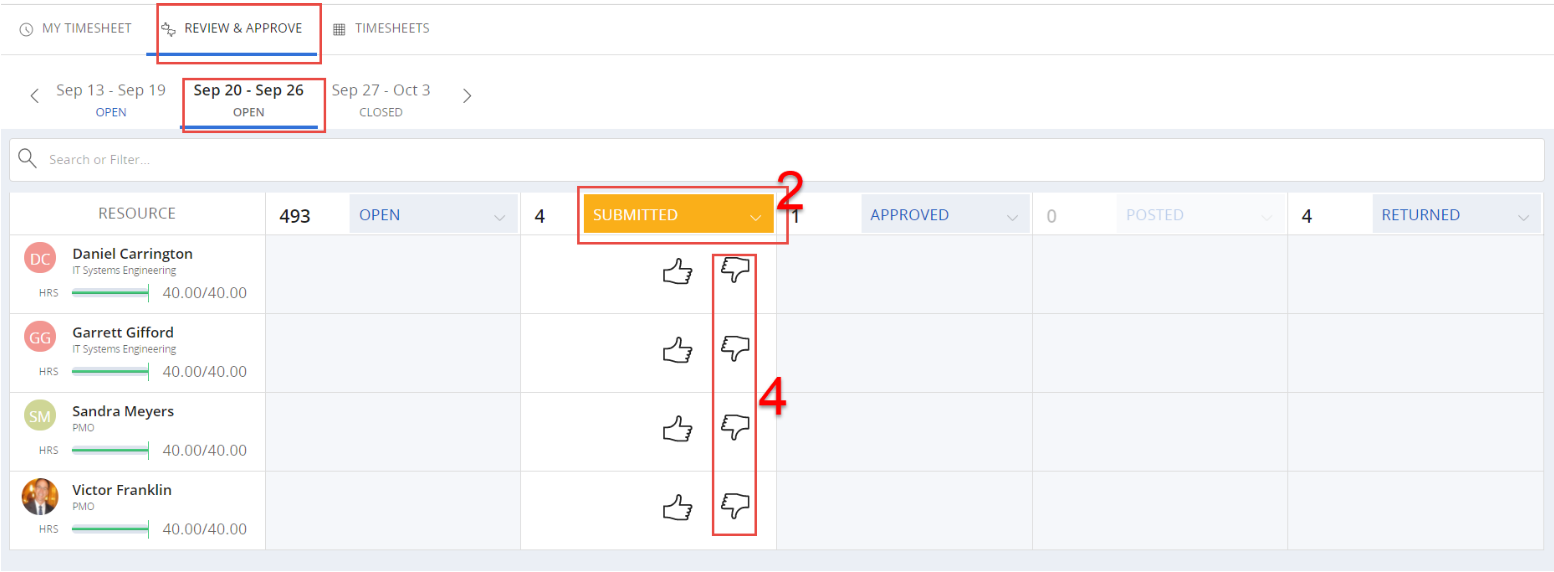


Returning a Timesheet to a Resource

2. To Review the Submitted timesheets, click on the Submitted column header

3. This will give you a list of Resources that have submitted their timesheets.

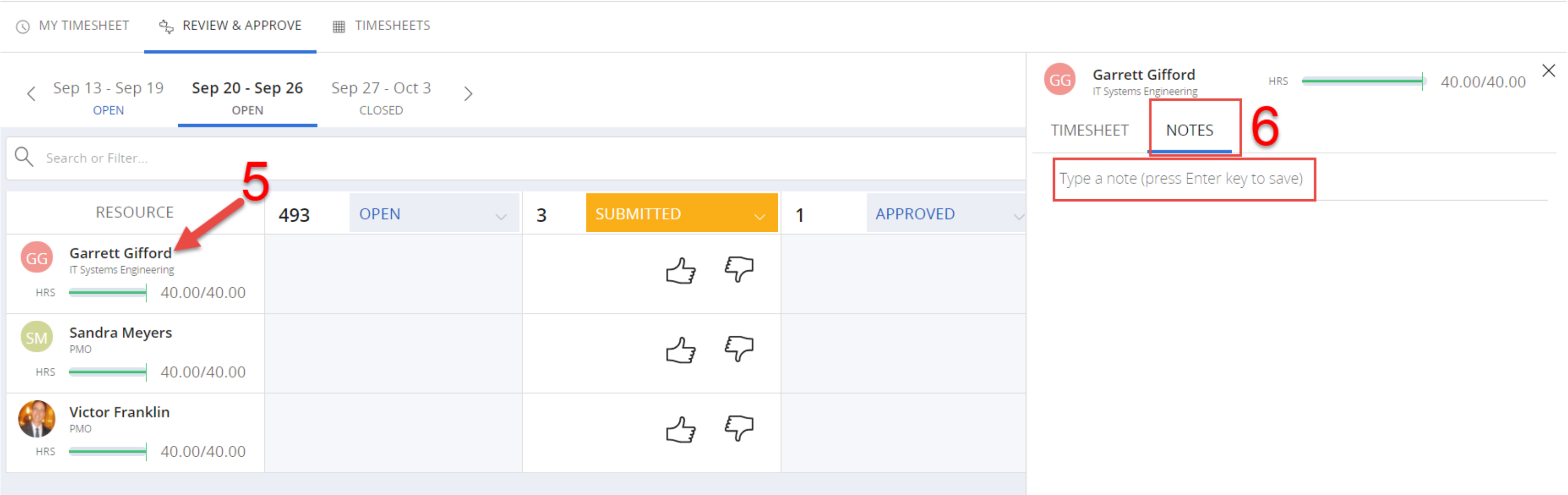
4. From here you can determine to “Return” an individual timesheet by clicking on the Thumbs-down (Return) icon for that resource.



Returning a Timesheet to a Resource

5. If you would like to add a Note, click the resource's name and a dialog window will appear on the right-hand side

6. Click on the Notes tab and enter in any comments or reasons as to why the timesheet has been returned and press the Enter key



Part 9: Summary

Resource Management Roles & Responsibilities

Resource Manager (RM)

- Approve timesheets
- Ensure timesheets are submitted on time
- Ensure resources are updating their Resource Calendar
- Monitor Resource Allocations as needed
- Communicate resource risks and issues to PMs & Leadership
- Work with Project Manager to resolve resource work conflicts

Project Manager (PM)

- Ensure Resource Allocations are sufficient to meet Project Demand
- Communicate resource issues to the Resource Manager & Leadership
- Add resource / team member to project and enter allocation

Team Member (TM)

- Enter timesheets weekly
- Update ETCs via timesheets as necessary
- Maintain non-working days in personal calendar