

# Time Tracking | Best Practices and Alternatives

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# Agenda

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- Understanding the Time Entry Stereotype
- Ideas for Simplifying Time Tracking
- General Tips and Tricks
- Summary

# Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



# Questions

- How many of you track time in CA PPM?
- Anyone track time somewhere else? Do you interface into CA PPM?
- Anyone not tracking time?
- Who has a user base that LIKES to track time?

# Why Do People Hate Time Entry?

- Open Mic
- What We Hear:
  - Big Brother
  - We are professionals; we don't need to be babysat
  - No Value
  - Pain to Remember each week

# How Does Time Tracking Help?

- Open Mic
- What We Hear:
  - Capitalization
  - Provide Data for Business to understand levers to pull
  - Understand our Cost Structure
  - Validate our estimates
  - Understand Progress
  - Resource Planning

# Part I: Ideas for Simplifying Time Entry

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# Ideas for Simplifying Time Tracking

## Approaches

- Time Granularity
- Partial Time
- Time in Their Native Tool (Integration)
- Pre-Populate Time

## General Tips & Tricks

- Sell the Value
- Manage Open for Time Entry
- # Periods Open
- “Prevent Unassigned Time Entry”
- Mobile Timesheets
- Use of Populate Functionality
- Classic Timesheet Usability Features
- 15.x Timesheet Experience

# Idea #1 – Time at a Higher Level

- 1-2 Time Task per Project (1 for CAPEX & 1 for OPEX)
- Move to Corporate Time Tool (PeopleSoft / Kronos / etc)
- One Task per phase
- NPIOs, Indirect Time
  
- Open Mic – Thoughts? Anyone Tried?

# Idea #2 – Partial Time

- Only Track Capital Activities
- Only Track Project Activities
- Only Some People Track Time
  
- Open Mic – Thoughts? Anyone Tried?

# Idea #3 – Time in The Tool They Work In

- ITSM Tool for Non-Application Part of the Business
- Agile Tool – JIRA, VersonOne, Rally, TFS, etc
- SharePoint – ITROI
- Integration with PPM to get total cost of the project
  
- Open Mic – Thoughts? Anyone Tried?

# Idea #4 – Pre-Populate Time

- Create Timesheets From Allocations or Assignments
  - We have had a couple business groups remove time tracking by using allocations or assignments to “create” timesheets to match. They stopped because they found it did not add much value to move hours from allocations to actuals.
  - Have timesheet pre-populated with time within assignments or allocations, then a person logs in and “validates” and makes changes before submitting
- New Rego Innovation Item
  - Timesheet Populated From Outlook
  - Import time from Agile tools
- Open Mic – Thoughts? Anyone Tried?

# Part II: General Tips & Tricks

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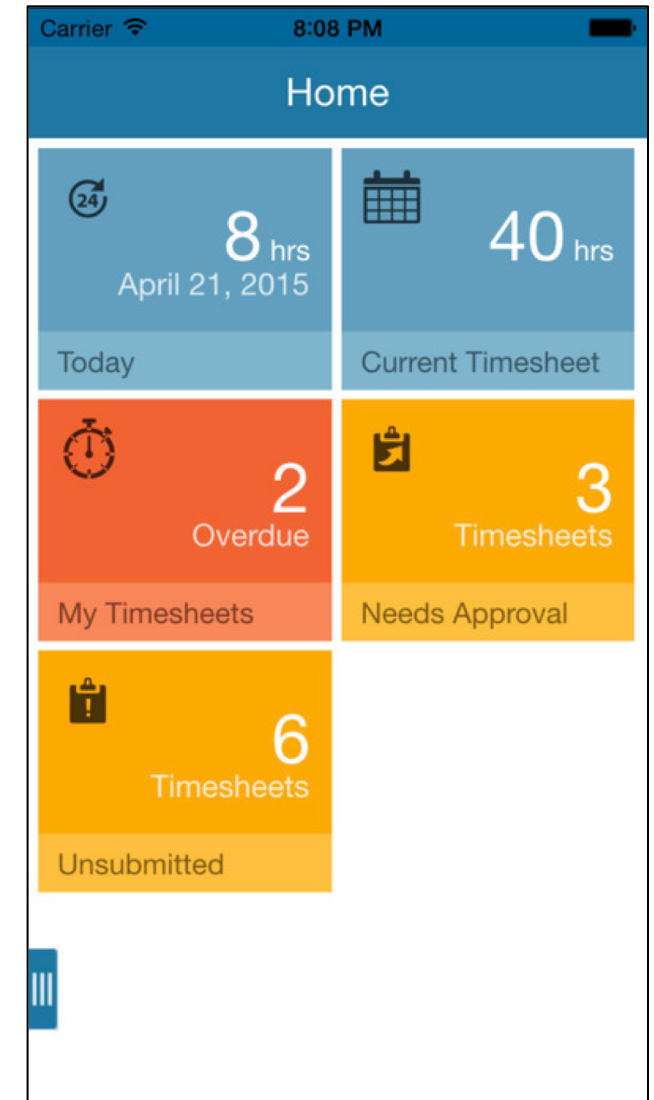
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# General Tips & Tricks

- Sell the Value
  - Promote timesheets as means for task prioritization.
  - Make the timesheet an operational view that fosters communication between PM and Team Member.
- Manage Open for Time Entry
  - Time entry may be managed at several levels: resource, project, team, and task.
  - Be sure your Project and Resource Managers are informed about the different options.
- # Periods Open
  - Don't leave too many periods open. This can get overwhelming from an admin perspective as well as if a user is trying to log time for previous/future weeks.
  - Lock down a set amount of periods to be open at any period (2 weeks previous/4 weeks future).
- “Prevent Unassigned Time Entry”
  - This is a flag at the project level.
  - If unchecked, a resource assigned on the project may pull in ANY task, even if he or she is not assigned.

# General Tips & Tricks

- Mobile Timesheets
  - Allow access for users to populate their timesheets from the mobile application.
- Use of Populate functionality
  - The *Copy Time Entries from Previous Timesheet* was updating in 14.4. It will ONLY bring in time entries from your previous timesheet. It no longer pulls all tasks that are within the date range and have ETC.



# General Tips & Tricks

Train folks on classic timesheet usability features.

Timesheet

Time Period: 12/16/17 - 12/22/17

Resource Name: Add informative columns.

Timesheet Status: Add informative columns.

Investment Phase Description Start Finish Input Type Code Sat 12/16 Sun 12/17 Mon 12/18 Tue 12/19 Wed 12/20 Thu 12/21 Fri 12/22 Total ETC Posted Actuals Baseline

Tasks

- Apriso - Danville Envisioning Phase Envisioning Phase (Time Tracking) 10/25/17 11/27/17 REG 4.00 4.00 4.00 12.00 2.50 37.50 0.00
- Burgundy - Phase 1A Development Phase 2a - Finance Development Time Entry 10/6/17 11/27/17 REG 4.00 11.50 4.00
- Burgundy - Phase 1A UAT - Downtime 12/4/17 12/15/17 REG 1.00 0.00 1.00
- EDI Modernization and OCR Envisioning Phase Envisioning Phase (Time Tracking) 11/20/17 12/20/17 REG 2.00 2.00 4.00 20.25 1.00 0.00
- Titan - #103 Cantech ERP (AX3 or Prism) Cantech IT Support Transition Planning (Mark/Matt/Pat) Transfer IT Support Mt to Joy 11/21/17 11/27/17 REG 0.00 0.50 0.50 0.00
- Titan - #103 Cantech ERP (AX3 or Prism) Cantech IT Support Transition Planning (Mark/Matt/Pat) 11/27/17 12/1/17 REG 0.00 8.00 0.00 0.00
- Transplace TMS re-implementation Deployment Phase Warranty 10/23/17 11/22/17 REG 0.00 0.00 31.50 0.00
- Unplanned - PMO Unplanned 11/27/17 12/29/17 REG 0.00 3.20 0.00 79.20
- 2017 Administration 2017 Administration 8/11/17 12/29/17 REG 0.00 9.60 42.50 237.60
- 2017 Support 2017 Support 9/18/17 12/29/17 REG 4.00 4.00 215.00 79.20
- 2017 Vacation 2017 Holiday 9/4/17 11/24/17 REG 0.00 0.00 24.00 0.00

Total 0.00 0.00 8.00 6.00 6.00 0.00 0.00 20.00

Enter a total and CAPPM will distribute evenly.

Use calendar to drive non-working days.

Use Task Hierarchy grouping when manually adding tasks.

Use calendar to drive non-working days.

Hover to see planned ETC.

Tue, 12/19, 2017 Administration, 2017 Administration, ETC: 2.40

[Configure]

[Printable Version]

Work Effort = Hours

# General Tips & Tricks

15.x provides a new UI for submitting timesheets. If you elect to use time tracking in the New UX, then you forfeit the ability to do it in Classic PPM.

CA PPM

MY TIMESHEET

REVIEW & APPROVE

Hi, Ross

<

Nov 28 - Dec 4

Dec 5 - Dec 11

Dec 12 - Dec 18

>

OPEN

RETURNED

OPEN

HOURS

56.00 / 40.00

PROJECT TIME

57%

SUBMIT

NOTES 2

+

 WORK
 

-

 WORK

|  | Input Type Code | Charge Code | Mon. 12 | Tue. 13 | Wed. 14 | Thu. 15 | Fri. 16 | Sat. 17 | Sun. 18 | Total | ETC  |
|--|-----------------|-------------|---------|---------|---------|---------|---------|---------|---------|-------|------|
| <div>Genius System Upgrade (PRJ00000006)</div>       |                 |             |         |         |         |         |         |         |         |       |      |
| Develop (Change Review Process)                      |                 | Develop     | 8.00    | 16.00   | 8.00    | 8.00    | 10.00   | 6.00    |         | 56.00 | 0.00 |
| <div>Upgrade MS SQL Server 2 (PRJ00000003)</div>     |                 |             |         |         |         |         |         |         |         |       |      |
| Requirements Planning (Initiation Phase)             |                 | Management  |         |         |         |         |         |         |         |       | 0.00 |
| 2 Risk Response and Mitigation Plan (Planning Phase) |                 | Planning    | 8.00    |         | 8.00    |         | 8.00    |         |         | 24.00 | 0.00 |
| <div>Services</div>                                  |                 |             |         |         |         |         |         |         |         |       |      |
| Cash Management                                      |                 | Management  |         | 8.00    |         | 8.00    | 2.00    | 6.00    |         | 24.00 |      |

# Summary

- The Likelihood of Removing Time is Low
  - Executives like to be informed on resource needs, project planning and financial impact, to get this information, time tracking is required.
- People Will Always Hate Entering Time – In Any Format
  - Time tracking is a necessary evil. Use some of the topics from our discussion to eliminate pain points.
- Try Marketing – Explain Why we Track Time, and Report Back on Benefits
  - If end users know that a report is helping drive business decisions or executive-level eyes are watching, they are more likely to submit timesheets accurately and on-time.

# Questions?



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- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!  
Don't forget to fill out the class survey.



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