Sopheon Accolade®

Time Tracking Training Guide

Version: 15.3

About Sopheon Accolade®

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Contents

About the Accolade Education Program

This module is part of the Sopheon Accolade Education Program (AEP). The AEP modules are designed to help Accolade users perform the tasks in their company's business process using the Accolade application. The content in the modules is meant to be used side-by-side with the application, and is part of the overall documentation suite provided for Accolade.

The benefits of using Accolade as part of your company's innovation development process include the following:

- Reduced cycle time by displaying clear structure and visibility.
- Reduced rework through timely, properly sequenced completion of all key tasks and milestones.
- Assured positive user experience through properly developed product requirements.
- Improved communication by automating collaboration between multifunctional team members.
- Provided decision-making information. Poor projects are stopped or placed on hold so resources can be redirected to more promising and higher value projects and products.
- Provided clear project requirements. Expectations of a project team and project manager at each stage are clearly spelled out.
- Managed business risk. Break resource commitments into increments or stages.
- Established key baseline information and metrics.

The Accolade documentation suite contains the following additional components:

Document	Contents
Sopheon Accolade What's New in This Release	For each release, review this document for an overview of the new features and changes within the release.
Accolade Online Help	Accessible directly through Accolade, the online Help provides comprehensive how-to and reference information about all aspects of using Accolade.
Sopheon Accolade Administrator's Guide	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
Sopheon Accolade Installation Guide	Provides information about the installation of the application and its required databases.
Dashboards for Accolade Installation Guide	Provides installation information for installing the Dashboards for Accolade component.
Quick Reference Cards	A PDF that can be printed double-sided that provides quick tips and navigation information for using Accolade.

Document	Contents
Online Help for Accolade Add-ins	Accolade add-ins, including Accolade Office Extensions, Accolade SmartDocuments for Google, Accolade SmartDocuments for Office, Accolade Portfolio Optimizer, and Accolade's integration with Microsoft Project, each include their own Sopheon created Help file accessible directly from the application after the add-in is installed. Each Help file describes how to use the features of that particular add-in.

Prerequisites for Using this Module

The contents of this training module assumes you are assigned the Accolade user roles and have a basic understanding of the terms and concepts listed below and how they are used in your installation. In addition, the content in the related training modules listed below may be helpful before reviewing the contents of this module.

Accolade User Roles

- Administrator
- Process Design*
- Project Managers
- Process Manager
- Timesheet User

*For configuration and setup.

Terms and Concepts

- General Accolade terminology and concepts
- Navigating Accolade

Related Training Modules

- Getting Started with Accolade

Time Tracking Overview

Using the optional Time Tracking feature, Accolade users can enter time spent working on Accolade projects, to track the actual time spent versus the time originally planned for projects. Tracking the actual time team members have spent on a project allows comparisons between estimates for a project to the actual time worked, providing insight to improve planning strategies and execution over the course of future projects.

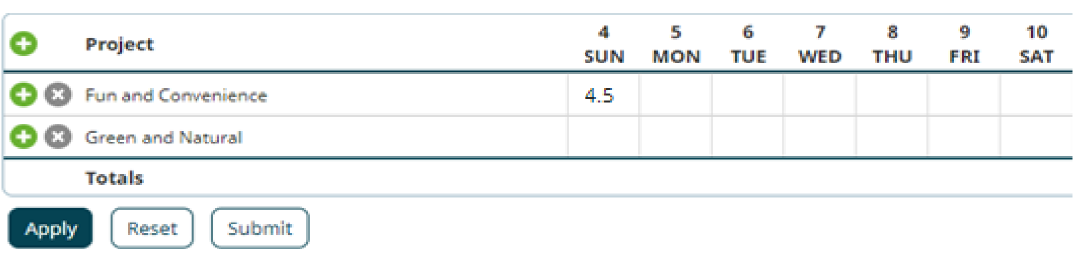
Project Managers have access to approve or reject a user's timesheet entries for the projects that they own, and Timesheet Approvers have access to approve time for resources that report directly to them but are assigned using resource pools.

Enabling Time Tracking for Projects

Your company may have projects that you include in Accolade that do not have time tracked against them. You can restrict timesheet entry at the class level, or at the project level.

- **Class Level** - Process Designers and Administrators can define which classes allow timesheet entry for the projects created for models within that class. Only projects within a class that allows timesheet entry are available for selection within timesheets. Classes are included in Time Tracking by default. .
- **Project Level** - At the individual project level, Process Managers and the assigned Project Manager can select whether the project is available for all timesheet users, only those on the team, or not available at all for timesheet entry. The entry selected is saved with the project team if you choose to save the team for use in other projects. Projects are set to be available to all timesheet users by default.

  The project team includes users assigned to the project on the project's **Team** page and those assigned as action owners in workflows within the project. Workflow action owners can access the project in Timesheet Entry if the project is available to timesheet entry and if they have approved or rejected a workflow action, or if the workflow is currently in process but they have not yet entered an action decision. This project access also applies to delegated action owners.



To set a project's timesheet availability:

1. Display the project and select the **Team** page.
2. Expand the Manage Team panel and click **Settings**.
3. In the **Timesheet Availability** field, select one of the following options:

- **Enable for all Timesheet Users** - The project is available for selection to all users who have the Timesheet User role.
- **Enable for Team only** - The project is available for selection to only users who have the Timesheet User role who are members of the project team.
- **Disable for all users** - The project is unavailable for selection within timesheet entry.

4. Click **Apply** to save your changes.

Exercises - Enabling Time Tracking for a Single Project

Try out what you have learned!

- Enable time tracking for a team of a single project only.
- Ensure users are assigned to the project team.
- Grant users Timesheet User role.

Tracking Time Spent on Projects

As the Project Manager for a project or your manager directs, enter the time you spend working on projects using the Timesheet Entry screen. Enter your time as accurately as possible to correctly reflect the amount of time you spent on a project each day. When your timesheet is complete for the time period, submit your time sheet for approval.

If another user has delegated their assignments to you, and you are not part of the original project team, you only have access to the project with the delegated assignments during the delegation period.

To track time spent on a project:

1. From the **Workspace** menu, select **My Workspace > Timesheet**.

   The timesheet for the current week displays.

   To select a different time period, click or to move to a different timesheet, or click and select a date to display the timesheet that includes that date.

   The current status of the timesheet displays under the time period at the top of the page.

2. To add projects to the timesheet, click , select one or more projects from the list, and click **OK**.

   Projects that display in this list are determined by the project's availability for timesheet entry and your access to the project.

3. *(Optional)* - Narrow the list of available projects to add by searching by the project name in the **Project Name Contains** field or by checking the **My Current Projects** check box. When checked, the list filters to projects you are assigned to as either a team member, team leader, workflow action owner, or gatekeeper. To return to the complete list of available projects, clear the search entry box and uncheck the check box.

   You can add the same project more than once to the same timesheet. Additionally, your ability to add or modify time on certain projects may be restricted depending on the state of the project or your rights on the project.

If you are removed from a project, but have already entered time to that project, the project displays as read-only within your timesheet. You can no longer select the project or add or modify time to the project. If a project is closed after it is added to a timesheet, users can add or modify time to the closed project on the timesheet. However, the closed project cannot be added to new timesheets.

If you were given access to a project to complete a workflow action and the workflow completed or stopped thus removing your project access, you can add or modify time to the project. The project id with a hidden tag displays in the list of available projects to add, and displays as included in the **My Current Projects** check box. You can also search by the project id to filter to the correct project.

4. Enter your time in the appropriate day columns and select any additional information required for your company's time tracking requirements.

   Your timesheet may include only the project and day columns; however, if your company requires more detail when tracking your time, there could be one or more additional columns that you need to complete when entering your time spent on a project. For example, country or state codes, or you may need to indicate which hours on your timesheet are billable to a customer. The additional columns available are unique to your company.

   If Resource Planning is enabled, a read only **Resource Pool** field displays. This field shows the resource pool you are a part of when submitting time, is available to view in reports, and helps the Project Manager and Resource Demand Planner with future planning. If you are not part of a resource pool, the field will be blank.

   Note: If daily maximum values or day restrictions are set by system parameters, you may not be able to enter time on each day or enter a value greater than the maximum daily value set. The system may clear out values entered on restricted days or above the maximum value, depending on the parameter configuration, and require you to correct the timesheet before submitting.

5. Click **Apply** to save your changes, or **Reset** to revert your changes to the last saved version.

   Next time you open the timesheet, any projects added display in the timesheet in alphabetical order.

6. When your timesheet is complete for the period, click **Submit** to send your timesheet to your Project Manager for approval.

   Next time you begin a timesheet for a new time period, Accolade displays a pre-populated timesheet with the latest prior timesheet rows including projects and extended field settings unique to your company. The time entry fields are blank and projects you no longer have rights to submit time against no longer display in the projects column.

   Submitted timesheets that are waiting for approval or that are in the approval process display as view only. To make corrections to submitted timesheets, display the timesheet and click **Reopen**. The approval status displays at the top of each timesheet under the time period date.

Notes:

- To delete a row from a timesheet, click next to the name of the project. All time entered for the project in that row is also deleted.
- To make corrections to a rejected timesheet, open the time sheet, update it as necessary, and click **Submit** to resubmit it for approval.
- If you are an action owner in a workflow for a project (or a delegated owner), you can enter time for the project if you have approved or rejected your action, or if you are an action owner for a workflow that is in progress. If a workflow has not started, the project may not be available to you if you are not assigned as a member of the project team outside the workflow.

Approving and Rejecting Timesheets

After a user completes and submits a timesheet, the timesheet enters the approval process. Timesheets waiting for approval are listed by user name, with the timesheet from the most recent time period displaying first, and the total number of hours spent on visible projects listed per timesheet.

- **Project Managers** have access to Timesheet Approval, which shows the timesheet entries that users have made for only the projects that they own. Users may have more time entered on their timesheet; however, a Project Manager's visibility and approval authority is restricted to only the projects to which they are assigned as the Project Manager. Project Managers review the time entered and approve timesheets for their projects, as necessary.

  Multiple Project Managers can have approval actions on a single user's timesheet. However, only one approver needs to approve the timesheet in order it for to be completed.

- **Timesheet Approvers** are assigned to a resource pool, and approve all timesheets for users within that pool. Typically, a Timesheet Approver approves a timesheet after each Project Manager has approved the time for their projects. However, a Timesheet Approver can approve a timesheet prior to a Project Manager's approval. When a Timesheet Approver approves a timesheet, they also approve time for projects that do not have an assigned Project Manager, such as projects used to track time for training or other general meetings. Timesheet Approvers can also be Project Managers. In this case, they only have to approve time for a project once.

  Timesheet Approvers can see all time entered for all projects on timesheets for users within their resource pools, regardless of project access. If the Timesheet Approver does not have access to a project, the project code displays instead of the project name by default.

To review and approve timesheets:

1. From the **Workspace** menu, select **Team Management > Timesheet Approval**.

   This menu option is available only to Project Managers and only when the Time Tracking feature is enabled.

2. Do one of the following:

- **To approve one or more timesheets** - Select the check box next to the timesheets you want to approve and click **Approve**. To select all timesheets listed, select the check box at the top left.
- **To view timesheet details before approving** - Click the user's name in a timesheet row to view the timesheet details. Click **Approve** to approve the timesheet directly from the detail page.

The portion of each selected timesheet for your projects is approved. The timesheet may have additional hours for other Project Managers to approve; however, it no longer displays in your approvals list.

To review and reject timesheets:

Important! If a Project Manager or Timesheet Approver rejects a timesheet when others have approved it, the entire timesheet must go through the approval process after the timesheet is resubmitted.

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1. From the **Workspace** menu, select **Team Management > Timesheet Approval**.

   This menu option is available only to Project Managers and only when the Time Tracking feature is enabled.
2. Click the user's name in a timesheet row to view the timesheet details.
3. Click **Reject**.
4. *(Optional)* In the comment box, enter the reason, up to 128 characters long, that you are rejecting the timesheet, and click **Reject**.

   The comments you enter here display to the timesheet user when they access to the timesheet for corrections. Include enough information so users understand why their timesheet was rejected.

Delegating Timesheet Approvals

To ensure timesheet approvals continue while you are out of the office or otherwise unavailable, delegate timesheet approval rights to someone else for a specified time period. Timesheets submitted during the specified delegated time period are automatically assigned to the selected user for approval. The user selected must have the **Timesheet Approver** role and will see the delegated timesheets on the Timesheet Approval page during the delegation period specified by the delegator. Be sure to communicate to the selected user that they are approving timesheets in your absence.

The delegated user does not need to have the same project access as the original timesheet approver to approve time on projects. However, only projects the original timesheet approver has rights and access to approve display for the delegated user. Once the delegation time period ends, the delegated user cannot approve time on projects they do not have access or visibility to.

To delegate timesheets for approval:

1. Access your user profile and select the **Details** tab.
2. In the **Delegate Assignments** section, complete the following information:

Field	Description
Delegate to User	Click and select the user responsible for approving timesheets in your absence. To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field. • Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights). • Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user. • Clicking the **Show advanced filters** check box displays or hides the additional filter options. • Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned.
Start Date	Enter or select the first date in the date range to which the delegation applies. The delegation period includes the date entered here.
End Date	Enter or select the last date in the date range to which the delegation applies. The delegation period includes the date entered here.

3. Click **Apply** to save your changes.

Setting Up Time Tracking

Before Accolade users can enter or approve time, Administrators and Process Designers must setup Timesheet Entry, including the following:

- Defining the unit of measure used in timesheets.
- Defining custom Timesheet Entry fields.
- Granting access to Timesheet Entry.
- Defining which projects allow timesheet entry.
- Defining who can approve timesheet entries.
- Creating resource pools and assigning timesheet approvers.

Timesheet Units of Measure

The day fields within timesheets accept whole and partial numbers between 0 and 99.99. To ensure that each user is entering time in the same unit of measure, set your own definition about how users track their time. For example, are users to track time by hours or by the percentage of the day they spent working on a project. This is a standard you should set within your projects and across your company. There is not a parameter or setting within Accolade that controls the unit of measure.

Timesheet Tracking Fields

To properly record timesheet information, use Accolade extended fields to add additional data columns that are specific to your company's time tracking requirements to the Timesheet Entry page. For example, your company may require that time that is billable to a customer be tracked separately than non-billable time, or that time worked in a different state or country be tracked separately for tax filing purposes.

To add additional fields to the Timesheet Entry page:

1. From the **System** menu, select **Configuration > Extended Fields**.

   If necessary, create an extended field, or expand the section that contains the field you want to make available in timesheets.
2. In the **Timesheet** column for each extended field to include, select the **Active** check box.
3. Click **Apply** to save your changes.

Timesheet Entry Access

The Timesheet User role is required for a user to have access to Timesheet entry.

To grant access for timesheet entry:

1. From the **System** menu, select **Collaboration & Groups > User Admin**.
2. In the **Users** list, click the name of the user to open the user details for editing .
3. Select **Roles and Rights** and select **Timesheet User**.
4. Click  to save your changes.

Timesheet Project Availability

Your company may have projects that you include in Accolade that do not have time tracked against them. You can restrict timesheet entry at the class level, or at the project level.

- **Class Level** - Process Designers and Administrators can define which classes allow timesheet entry for the projects created for models within that class. Only projects within a class that allows timesheet entry are available for selection within users' timesheets. Classes are set to be included in Time Tracking by default.
- **Project Level** - At the individual project level, Process Managers and the assigned project manager can select whether the project is available for all timesheet users, only those on the team, or not available at all for timesheet entry. The entry selected is saved with the project team for use in other projects. Projects are set to be available to all timesheet users by default.

To define a class to allow timesheet entry:

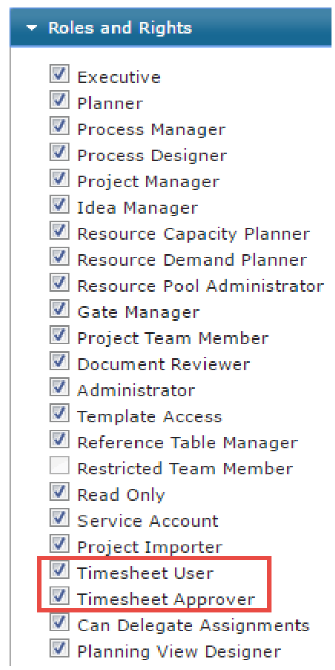
1. From the **System** menu, select **Process > Classes**.
2. Click the name of the class you want to edit or create a class.
3. In the class definition, select **Include in Time Tracking** to include projects within this class in timesheets.

   Clear the check box if projects in this class do not require time tracked to them.
4. Click **Apply** to save your changes.

Timesheet Approval Access

The Timesheet Approver user role is required for a user to be assigned to a resource pool as its timesheet approver. Users assigned as the Timesheet Approver in a resource pool approve all timesheets for users within that pool.

> **Note:** Assigned Project Managers have access to approve time for their projects without the addition of the Timesheet Approver role.



To assign users the Timesheet Approver role:

1. From the **System** menu, select **Collaboration & Groups > User Admin**.
2. In the **Users** list, click the name of the user to open the user details for editing .
3. Select **Roles and Rights** and select **Timesheet Approver**.
4. Click  to save your changes.

Notes:

- The **Weekly Start Day** system parameter determines the day of the week on which a time period starts. This parameter is set so a time period starts on Sunday and ends on Saturday.

Creating Resource Pools for Time Tracking

Resource Pools are groups of similar resource types, or groups of resources that report to a single person for time tracking purposes. Administrators and Resource Pool Administrators can create and modify resource pools. How you group your resources into pools and how you manage your resource pools depends on the processes defined in your organization. For time tracking purposes, define resource pools and add resources to those pools based on who approves the timesheet for the users that belong to the pool.

If you use Time Tracking and Resource Planning, you can use the same pools for timesheet approval as you use for resource planning purposes.

To create a resource pool for time tracking:

1. From the **Resource** menu, select **Pools**.
2. Do one of the following:
   - **To create a new pool** - Click **Add Pool** in the upper right corner of the page.
   - **To modify an existing pool** - Click the name of the pool to open it for edition.
3. Complete the following information about the pool:

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the pool.
Active	Select this check box if the pool is ready to use for time tracking.
Security Lists	If security lists are in use, select items in every list to specify which Pool Administrators can add resources to this pool if it is does not have an owner.
Unit of Measure	Enter the units in which this resource is counted for Resource Planning. The unit of measure you select here does not need to match the unit of measure that users enter their time in timesheet entry. Timesheet entry is based on your company's internal, decided upon convention.
Timesheet Approver	Click to select the user that approves all timesheets for resources within the pool. To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field. • Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights). • Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user. • Clicking the **Show advanced filters** check box displays or hides the additional filter options. • Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned.

Field	Description
	If a pool does not have an assigned Timesheet Approver, timesheets for users within that pool are not sent through the timesheet approval process. If a resource pool does not have a user selected here, timesheets for users within that pool do not require Timesheet Approver approval. Only users assigned the Timesheet Approver user role are available for selection.
Extended Fields	If one or more extended fields have been configured for resource pools, select the appropriate values for this pool. Fields are used to identify pool contents on the Resource Pools page. Extended fields must be set to apply to resource pools. If extended fields are set only for timesheets, the fields do not display here.

4. Click **Create** to create the pool or **Apply** to save changes to an existing pool.

Notes:

- If security lists are enabled, Administrators can create or modify a pool with any security setting, but a Resource Pool Administrator can only create or modify pools that the Pool Administrator can access.
- Resource Pool Administrators can only assign security to a pool to which they have security access. Administrators can assign any item in a security list to a new pool.

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