

#### Technical Assistance:

email: <u>PPMO@asu.edu</u>

website: http://links.asu.edu/ppmo

Jump to the topic of your choice by clicking on a link below.

Cor	ncepts:	2
1.	Resources	2
2.	Skills & Roles	2
3.	Projects	2
4.	Portfolios	2
5.	Requests	2
Prod	cedures:	4
1.	Request a Planview Account	4
2.	Login	4
3.	Create portfolios	5
	Create a Work Portfolio	5
	Create a Resource Portfolio	8
4.	Grants1	0
5.	View your PlanView Profile1	2
6.	Define Role for your Team Members1	4
7.	Manage Resources1	6
	Approve Requests1	6
	Deny a request1	7
	Substitute a Resource1	7
	Authorize Resources to a MOB2	0
	Fill out your timesheet	2
8.	Review your peoples' work2	4
	Review Timesheets	4
	Review work done on a task	5
	View a report of Time entered2	6
Hel	o and Further training2	9
	Planview Prisms training	
	-	



# Concepts:

### 1. Resources

In Planview, resources are employees.

## 2. Skills & Roles

As projects are created, tasks are created that need employees with certain skills or roles to fulfill the task. Roles are assigned by resource managers to the employees that they manage in Planview.

Every employee can update his/her skills in Planview. Resource managers can then search for roles and skills to fill a task.

## 3. Projects

Projects are collections of tasks. These tasks have time frames and can have employees attached to the tasks. Financial information is also stored with the project. Once the project is in executing mode, a baseline is taken to help monitor the progress of the project.

## 4. Portfolios

Portfolios are collections of either projects or employees (called resources). Work portfolios hold collections of projects. Resource portfolios hold collections of employees (resources).

### 5. Requests

Resources in PlanView are people that do the tasks in the projects. As we start to use PlanView, more and more of our work will be tracked in the software. There are three basic ways that people who have access to PlanView will enter their time.

- Standard Activities these are activities like meetings, sick days, vacation
- **Maintenance of Business (MOB)** These are special projects where the work is not planned and very dynamic (like server maintenance).
- **Project work** These are tasks in the projects that must be accomplished. In project work, project managers work with resource managers to request people to do certain tasks.
  - Requirement This is a high level requirement to have a certain skill on your project. "I need web developers, graphic artists and a communications person on my project"
  - **Reservation** This is soft booking a specific person for a future time frame. This keeps the person from being overbooked in the future.



- Allocation This is booking a specific person to do a specific task during a specific time frame. The person can log his/her hours in PlanView against an allocation.
- **Authorization** Allows people to track time to a project, without being specific about a specific task with a start and end date. "I worked for 10 hours this week on server maintenance".

Түре	TIME FRAME	NAMED RESOURCE	DECREMENT FROM AVAILABILITY	CHARGE TIME TO TIMESHEET	WBS LEVEL
Requirements	12+ Weeks Out	No	No	No	Any
Reserves	7-12 Weeks Out	Yes	Yes	No	Any
Allocations	1-6 Weeks Out	Yes	Yes	Yes	Lowest
Authorizations	Non-Planned	Possible	No	Yes	Any
Standard Activities	Non-Planned	No	No	Yes	



# **Procedures:**

## 1. Request a Planview Account

Request an account and/or charter by talking the PPMO office. Email <a href="mailto:ppmo@asu.edu">ppmo@asu.edu</a> and request an account. The office will need to know what type of account you need:

- Project manager (creates and maintains projects in Planview)
- **Resource manager** (manages people's work on different projects)
- **Team member** (records time against tasks in projects in Planview)

### 2. Login

Once you have an account, login to Planview at <u>https://www.asu.edu/planview</u> **NOTE:** Works best if viewed with Internet Explorer.

ARIZ UNIV	ona State 'ersity	
ASU.edu		<pre>check it out: → m.asu.edu </pre>
	Sign In	
ASURITE User ID:		Activate or Request an ID
Password:		Forgot ID / Password?
	Sign In 🔲 Remember My Us	ser ID
Need Help? Visi	t the Help Center or call 1-855-ASU-50	80 (1-855-278-5080)
System Stat	us   ASU Home   Copyright   Accepta	ble Use   Privacy



### 3. Create portfolios

A portfolio is a collection of projects or resources .

#### Create a Work Portfolio

1. Click on Go to Portolios > Work portfolios > Create a Work Portfolio

PLANVIEW ENTERPRISE	Go To Portfolios 🖕 Glob	al Favorites, Notifications Timesheet
Homeview Work Resources Analytics	Recently Visited Quick Links	·
Back Homeview Portal	Work portfolios	🛚 All UTO projects 🛛 🧷 🗙
N-KE-K	Projects Resource portfolios	Centralized Digital Certificates 🖉 X
Notifications		View/Edit All Work Portfolios Create a Work Portfolio

- 2. Type in a name for the portfolio.
- 3. Use the data picker to select the projects for your portfolio.
- 4. Type in a description of the portfolio (optional)





- 5. Navigate through the folders on the left to get to the desired level of projects.
- 6. Click on the checkboxes next to the projects you want in your portfolio.
- 7. Click **OK**.

Hierarchy	Search	Favorites	Recent	ts Selections				
U Arizona State Department: U Division: Ac	niversity Tec ademc Tech		Jump To	KLM NOPQRS XYZ				
Division: Inf	ormation Se	curity Office		Description ↓	WorkID			
+ Division: Ini		upport	E	Centralized Certificates and Test	0000092	*	-	
+ Division: Pla	anning & Pro	grams Mana <sub>i</sub>	<b></b>	Centralized Digital Certificates	0000094	*		F
		-		Confirmation 4	0000084	*		Con l
			V	Confirmation 5	0000085	*	-	
				Email Security- Test	0000090	*		
				Email Security- Test	0000091	*		
			<u></u>	test abc	0000093	*	-	
111		- · ·						

#### 8. Click Save.

PLANVIEW	ENTERPRISE	Go To Portfolios 🚽	Global Favorites	Notifications
Homeview Work	Resources Analytics			
Current Portfolio:	Centralized Digital Certificates	🔽 🌽 Project: [	All Projects] 🗸	
Back Create W	ork Portfolio for pstoll			
			<u>&gt; s</u>	ave Cancel
Create Portfolio				
Worl	Confirmation 4 Confirmation 5			6ā
Name	confirmation projects in inf	fosec office		]
Description	These are the two projects that were part of the planvi			

The projects that you select will show in the work field. In this example, we have selected two projects and typed in a Name and Description.



You wil be presented with your portfolo screen.

omeview Work				_						
	nfirmation project	s in infosec offic	e 🔽 🥜 Proje	ct: [All Projec	ts] 🗸					
ack Portfolio Por	tal									
								Datamart p	orogressed t	
Notifications										
A Requires Attent	ion (2) 🕴									
										A View A
Project Navig	ator									
Schedule	<u>Status</u>	PM Status	<u>Details</u>	Lifecycle	Finance	<u>Changes</u> <u>Risks</u> <u>Issues</u>	Resource Profile	<u>Status</u> <u>Report</u>	Project Website	<u>To Do</u> <u>List</u>
Confirmation 4	Executing			୍ଦ	~~~	<b>1</b> 2	2	4		E
Confirmation 5	Executing			6	~~~	<b>%</b>	2	4		Ŧ
Allocations At	Risk									
Project	Work ID	Task			Resources	Sc	hedule Start	Schedul	e Finish	Utilizatio
Confirmation 4	0000084	Expected delivered and contraints	ery schedule		Connie Roberts		1/23/2012	1	/31/2012	20
Confirmation 5	0000085	Refine WBS			Lani Hildebrant		1/23/2012		2/9/2012	20
Confirmation 5	0000085	Refine WBS			Matthew Rapp		1/23/2012	1	/23/2012	20
Confirmation 5	0000085	Determine proj	ect methodolo	ΩV	Chris Deaton		1/23/2012	1	/23/2012	20
Not Staffed W	/ork									
Project	Work ID	Task					Schedule S	Start	Sche	edule Finisl
<u>Confirmation</u>	0000084	Define	e deliverables				1/23/2	2012		1/23/201
Confirmation 4	0000084	Reso	urces and repo	rting matrix			1/23/2	2012		2/29/201
Confirmation 4	0000084	prede	cesor				1/23/2	2012		1/23/201
Confirmation 5	0000085	Define	e interim delive	rables			1/23/2	2012		1/23/201
- <u>Confirmation</u> 5	0000085						1/23/2	2012		1/23/201
More ≫										

Each project that you selected is available in the *Project Navigator* area. The various Icons and links will give you different views into each project.

Depending on your access to Planview, you may also see information about different resources for each project as well.

To get back to the homepage, click **Homeview** and then **Dashboard**.

From the homepage, you can get back to your portfolio by clicking on **Go to Portfolios > Project Portfolios > Select your portfolio name.** 



#### Create a Resource Portfolio

A resource portfolio is a collection of people in Planview.

You must set up a portfolio to use the resource assignment manager.

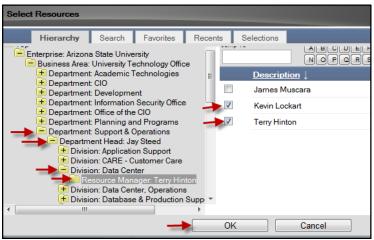
1. In the top bar click **Go to Portolios > Resource portfolios > Create a Resource Portfolio** 

PLANVIEW				Go To Portfolios 🖉	Global	Favorites	Notification	s Times
Homeview	Work	Resources	Analytics	Recently Visited Quick Links	2			
Back Ho	meview	Portal		Work portfolios				
				Projects	2			
Notific	ations		-	Resource portfolios	s 🔹	UTO care i	resources	0×
* Requi	res Atter	ntion (5) >		Open the GoTo Wir	ndow	View/Edit A	II Resource	Portfolios
		Contract of the Reserved			-	Create a R	esource Por	tfolio

- 2. Type a name for the portfolio in the name field.
- 3. Fill in the description field as well, if desired.
- 4. To fill in the resource field, click on the select work button next to the field.

PLANVIEW	<b>ENTERPRISE</b>	Go To Portfolios Notifications Tin	Global Favorites
Homeview Wor	k Resources Analytics		
Current Portfolio:	Centralized Digital Certificate	IS 💌 🥕 Project 🏼 [A	II Projects] 😽
Back Create V	Vork Portfolio for pstoll	Save Ca	ncel
Create Portfoli	o		
Work			
Name	lew Portfolio		
Description			h

- 5. Navigate through the folders on the left to get to the desired level of resources.
- 6. Click on the checkboxes next to the resources you want in your portfolio.
- 7. Click **OK**.





#### 8. Click **Save**.

PLANVIEW	SE	Go To Portfolios 🚽	Global Favorites 🗸	Notifications	Time
Homeview Work Resources A	nalytics				
Back Create Resource Portfolio fo	or pstoll				
			Save	Cancel	
Create Portfolio					
Resources	Support & O	perations			
Name	Support and	Ops			
Exclude Resources whose Employment End Date has passed					
Description	All people in	support and oper	rations	li.	

You wil be presented with your portfolo screen.

	ork Resour	rces Anal													
Current Portfolio:	rce Portal		<i>6</i> 7												
Dack Resour	rce Portai														_
Notificatio															
* Requires /										Veeds	Approva				_
A Hequites /										V HOCU	Approva				_
															_
Timeshee															
No Notificatio	n within the	past period	setting.												
Graphical	Profile S	Summary													
	12 Time No														
2012 Jan	2012 Feb	2012 Mar	2012 Apr	2012 May	2012 Jun	2012 Jul	2012 Aug	2012 Sep	2012 Oct	2012 Nov	2012 Dec	2013 Jan	2013 Feb	2013 Mar	20 A
		<u> </u>	-		ш	ш		ш	ш	ш		н	H	н	Н
						- 1				- 1					
						- 1				- 1					
137.29 d	177.38 d	47.42 d	16.8 d	17.6 d	16.8 d	16.8 d	18.4 d	15.2 d	18.4 d	15.2 d	14.4 d	0 d	0 d	0 d	0
Resource	Utilizatio	on													
							Res	ource Uti	lization o	ver a <u>12</u> v	veek rang	je			_
No data was f	ound for the	se selection	<b>S</b> .												

The default view shows a timeline, with a red line indicating where "fully loaded" for those resources. In this example, no requests for resources time have been put into Planview yet, so no data appears on this example screen.



# 4. Grants

"Grants" are the way that people are given different levels of access in Planview. "Work Grants" allow people to view or edit projects.

"Resource Grants" allow people to view and manage resources.

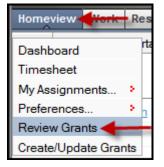
Planview administrators do the majority of this work.

Project managers can grant work grants to projects that they manage.

Resource managers can view their own resource grants.

#### Review your grants:

1. In Planview, click on Homeview then on Review Grants.



2. There are four types of grants. Click on each link to see the grants that you have been given.

Review grants					
Work grants					
Resource grants					
Resource grants that affect Assignment notifications					
Resource grants that affect Time & Billing notifications					

#### Work Grants

This example shows that this person has read only (RO) access to all of the projects in the UTO department, and Read Write (RW) access to several specific projects.

Homeview Worl	k Resources Analytics								
Back Grants for Paul Stoll									
	Grants	Level Grant Type							
Department:	University Technology Office (UTO)	2 RO							
Project:	MOB - Customer Service	4 RW							
Project:	MOB - Training Administration	4 RW							
Project:	MOB - Training Content	4 RW							
Project:	MOB - Workshop Delivery	4 RW							
Project:	Peoplesoft HRSA 9.0 Upgrade	4 RW							
Project:	PS9 Training Development/Deliver	4 RW							



#### **Resource Grants**

Resource grants will allow you to approve resources time, review time put into timesheets, change their roles and manage their work on projects. After clicking on Resource grants, you will likely see something like the below.

PLA	PLANVIEW <sup>V</sup> ENTERPRISE				Go To Portfolios 🕌	Global Favorites 🖕	Notifications	Ti
Homev	riew 🚺	Nork	Resources	Analytics				
Back	Reso	ource (	Grants for Pau	il Stoll				
				<u>Grants</u>		Level	Grant Type	
Busine	ss Area	ac		University Tec	hnology Office	2	RO	
Resou	rce Ma	nager	8	Pool for		6	RW	
Resou	rce:			e		7	RW	

This person has read only access to everyone in UTO, and has Read / Write access to certain people.

Note that the person's name (your name) is listed twice, once as a Resource Manager and once as a Resource.

Click on the name across from the *Resource Manager* label and you will see the resources that report to that resource manager.

Home	view	Work	Resources	Analytics
Back	Chi	ldren of	Resource Gr	ants
Struct	ure l	Parent	5	
Ente	rprise	Arizon	a State Unive	rsity
Bu	sines	s Area:	University Tec	hnology Office
D	)epar	tment; F	lanning and l	Programs
	Depa	artment	Head: D	AL CONTRACTOR
	Div	ision: IT	Planning & P	Project Management
	R	esource	e Manager: <b>P</b> l	
Struct	ure	Childre	n	
		Resour	ce: <mark>M</mark>	Territor and the
		Resour	ce: M	or Children and Ch
		Resour	ce: M	ET ISAN BE
		Resour	ce: G	ender and a
		Resour	ce: Ar	10



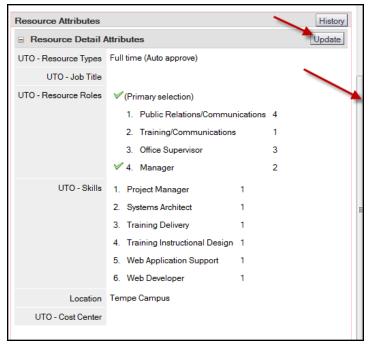
## 5. View your PlanView Profile

Planview will search for people's attributes and roles when suggesting people to work on tasks. Here is how to update your skills.

1. In PlanView, click on Homeview > My Assignments > My Attributes



2. Scroll to the bottom and click on **Update** next to the Resource Detail Attributes.





#### 3. Click on Add UTO – Skills attribute.

PLANVIEW <b>FEN</b>			Close
PLANVIEW EN			Help
Resource Detail Attribute	s for Paul Stoll		
Resource Detail Attri	butes	Requi	red Fields
UTO - Resource Types	Full time (Auto approve) 💌		
UTO - Job Title		۵ 🚖 🗉	
UTO - Resource Roles	Add UTO - Resource Roles attribute		
	<ul> <li>(Primary selection)</li> </ul>		
	1. Manager	2 💌	×
	2. Office Supervisor	3 👻	×
	3. Public Relations/Communications	4 👻	×
	6 4. Training/Communications	1 💌	×
UTO - Skills	Add UTO - Skills attribute		
	1. Project Manager	1 🗸 👂	8
	2. Systems Architect	1 💌 👂	8
	3. Training Delivery	1 💌 👂	8
	4. Training Instructional Design	1 💌 👂	6
	5. Web Application Support	1 💌 👂	6
	6. Web Developer	1 💌 👂	8
Location	Tempe Campus 💌		
UTO - Cost Center		9	
	Save Cancel		

4. Click on the check boxes next to the skills that you possess. Then click on **OK**.

Hierarchy Search Favorites Recent			
Skille Ju	mpTo NOPQRSTUYWXY	<< <	>
	Description ↓		
	3rd Party/Off-the-Shelf Application Administrator	*	-
1	Academic Instructional Design	*	-
1	Academic Technologies*	*	
1	Administrative Assistant	*	
1	Blackboard Support	*	. 🗔
1	Business Analyst	*	. 00
1	Century Link Land	*	. 13
	Citrix Land	*	
	Classroom Support	*	
	Classroom Technologies	*	
	Conferencing (video and web)	*	. 0.
1	Construction	*	
1	Contract Application Manager	*	. 00
1	Dashboard Developer	*	
1	Data Center Operations	🚖 🚊	
1	Data Warehouse Developer	*	
1000	DBA	*	

5. Rank your skills as most prevalent (1) to least prevalent (larger number) click Save.



### 6. Define Role for your Team Members

As a resource manager, you have the responsibility to select the role in Planview that best fits each of your team members. As project managers look for resources for their projects, these roles will be the primary way that they locate people to work on their projects.

To define the role for a team member, follow these steps: In PlanView, click on **Resources > Resource Assignment Manager** 

Homeview Work		Work	Resources	
Current Portfolio: UT		olio: <mark>UT</mark>	Dashboard	
Back	Back Resource		Time and Billing >	
		1	Resource Assignment Manager	
Nu	Numerical Profile		Review Resource Utilization	μ
	Description		Review Org. Resource Utilization	rnal
			Fill Resource Requirements	
<ul> <li>Unfilled Requ</li> </ul>		ed Requ	Fill Unaddressed Resource Requirements	
			Scheduled Assignments Graph	

You will see a page that shows all of the people that report to you (according to Planview)

Click on the red down arrow next to a resource's name and choose resource detail.

🗊 🔶 Gregory Boehm
Resource Detail
Create New Standard Work Activity
Approve Time and Billing
Review Time and Billing
View Authorizations
View Support Tickets
Substitute Resource



Scroll down and click on the **update** button in the Resource Details Attrib ute section.

Resource Attributes		History
Resource Detail Attributes		Update
UTO - Resource Types	Full time (Auto approve)	
UTO - Job Title	Support Systems Analyst Senior	
UTO - Resource Roles	✓(Primary selection)	
	1. Training/Communications	3
	✓ 2. Support Systems Analyst	1
	3. Information Technology Specialist	1
	4. LMS Specialist	1
	5. Web Administrator	3
UTO - Skills		
Location	Tempe Campus	
UTO - Cost Center		

PLANVIEW <sup>V</sup> EN	TERPRISE	Back
Resource Detail Attribute	s for Gregory Boehm	
Resource Detail Attr	ibutes	Required Fields
UTO - Resource Types	Full time (Auto approve) 💌	
UTO - Job Title	Support Systems Analyst Senior	3
UTO - Resource Roles	<ul> <li>Add UTO - Resource Roles attribute</li> <li>(Primary selection)</li> <li>Information Technology Specialist</li> </ul>	1.
UTO - Skills	Add UTO - Skills attribute	
Location	Tempe Campus	
UTO - Cost Center	Save Cancel	i i i i i i i i i i i i i i i i i i i
Done	Internet   Protected Mode: On	<ul> <li>• • • • • • • • • • • • • • • • • • •</li></ul>

Use the data picker to select the **Job Title** (if incorrect)

Click on the **Resource Roles Attribute** to change the resource role to match the job title (if appropriate)

Click **Save** 



## 7. Manage Resources

The most important work you will do in Planview is to manage your people. This includes:

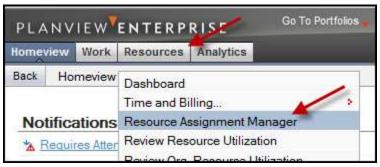
- Approving requests for your people's time on projects
- Manage situations where too much of a person's time is requested
- Review requested time vs. time reported by your people.

### Approve Requests

Project managers will request time of your employees.

Approve these requests from the resource assignment manager.

1. Go to the Resource Assignment Manager (RAM)



- 2. Expand the list of requested tasks for each person.
- 3. Double click on the "State" column item to change the value from "requested" to "approved".

Description	Work ID	State
D Jumes (Hickey)		
A COLORIDADE		1
Project Management - WG 14 - Split Build	0000080	Approved
Testing Coordination - WG 14 - Split build-out	0000080	Approved
WG7A - Testing Coordination Remaining PS 9	0000078	Approved
WG7A - Project Management	0000078	Approved
Infrastructure Coordination and Test Move - WG16	0000080	Approved
My ASU Testing - WG 16 - Split Testing	0000080	Approved
Þ		



### Deny a request

If a person is overbooked, you can deny requests that overbook their time.

1. Go to the resource assignment manager.

PLA	NИ	IEW	ENTERPRISE Go To Portfolios
Homey	view	Work	Resources Analytics
Back	Ho	meview	Dashboard Time and Billing
Not	tifica	ations	Resource Assignment Manager
* <u>A</u> E	lequir	es Atter	Review Resource Utilization

- 2. Expand the list of requested tasks for each person.
- 3. Double click on the "State" column item and change the value from "requested" to "denied".

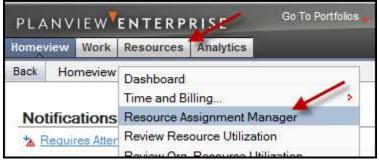
	Description	Work ID	State	Internal Priority * ~	Start Date 🔶 👻	Finish Date	Duration	Effort	%	Mi	Ju J	u Ai	
										5			
	- Hun - Hamin									-	-		
										Π.		1	
	Project Management - WG 14 - Split Build	0000080	Approved	Important	5/14/2012	5/25/2012	10.0d	1.0d	10%	1.0			
	Testing Coordination - WG 14 - Split build-out	0000080	Approved	Important	5/14/2012	5/18/2012	5.0d	2.0d	40%	2.0			
<b>-</b>	WG7A - Testing Coordination Remaining PS 9	0000078	Approved	Important	5/14/2012	6/11/2012	20.0d	6.0d	30%	3.9	2.1		
<b></b>	WG7A - Project Management	0000078	Approved	Important	5/18/2012	6/15/2012	20.0d	3.0d	15%	1.4	1.7		
<b></b>	Infrastructure Coordination and Test Move - WG16	0000080	Approved	Important	6/1/2012	7/13/2012	30.0d	30.0d	100%		21.9	0	
<b></b>	My ASU Testing - WG 16 - Split Testing	0000080	Approved	Important	6/1/2012	7/13/2012	30.0d	4.5d	15%		3.2 1	.4	
											_		

4. In this example, you can see that the person is overbooked in June (see the red column above the red line in the upper right corner of the graphic). The numbers in red also indicate that the requests overbook the employee. One way to fix this is to deny the request that overbooks the employee.

### Substitute a Resource

If a person is overbooked, you can substitute a different resource for that task.

5. Go to the resource assignment manager.



6. Expand the list of requested tasks for each person.



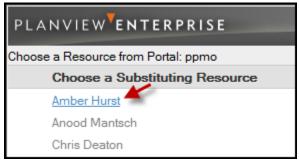
7. Click on the red action arrow for an item that is overbooked and choose "Substitute Resource".

			1						_	
	Work ID	State	Internal Priority ^ -	Start Date ^ -	Finish Date	Duration	Effort	%	Mi J	Ju Ju
									<b>.</b>	
									п	Пп
nt - WG 14 - Split Build	0000080	Approved	Important	5/14/2012	5/25/2012	10.0d	1.0d	10%	1.0	
on - WG 14 - Split build-out	0000080	Approved	Important	5/14/2012	5/18/2012	5.0d	2.0d	40%	2.0	
ordination Remaining PS 9	0000078	Approved	Important	5/14/2012	6/11/2012	20.0d	6.0d	30%	3.92	2.1
nagement	0000078	Approved	Important	5/18/2012	6/15/2012	20.0d	3.0d	15%	1.41	7
□			Important	6/1/2012	7/13/2012	30.0d	30.0d	100%	2	21. 9.0
■▼ My ASU Testing - WG 16 - Split Testing			Important	6/1/2012	7/13/2012	30.0d	4.5d	15%	3	3.2 1.4
	on - WG 14 - Split build-out ordination Remaining PS 9 nagement dination and Test Move - WG16	nt - WG 14 - Split Build I 0000080 on - WG 14 - Split build-out I 0000080 ordination Remaining PS 9 I 0000078 nagement I 0000078 rdination and Test Move - WG16	on - WG 14 - Split build-out 0000080 Approved ordination Remaining PS 9 0000078 Approved nagement 0000078 Approved dination and Test Move - WG16 0000080 Approved	nt - WG 14 - Split Build 0000080 Approved Important ordination Remaining PS 9 0000078 Approved Important nagement 0000078 Approved Important crdination and Test Move - WG16 0000080 Approved Important	nt - WG 14 - Split Build 0000080 Approved Important 5/14/2012 ordination Remaining PS 9 0000078 Approved Important 5/14/2012 nagement 0000078 Approved Important 5/14/2012 rdination and Test Move - WG16 000080 Approved Important 6/1/2012	nt - WG 14 - Split Build       0000080       Approved       Important       5/14/2012       5/25/2012         on - WG 14 - Split build-out       0000080       Approved       Important       5/14/2012       5/18/2012         ordination Remaining PS 9       0000078       Approved       Important       5/14/2012       6/11/2012         nagement       0000080       Approved       Important       5/18/2012       6/15/2012         rdination and Test Move - WG16       0000080       Approved       Important       6/1/2012       7/13/2012	nt - WG 14 - Split Build       0000080       Approved       Important       5/14/2012       5/25/2012       10.0d         ordination Remaining PS 9       0000078       Approved       Important       5/14/2012       6/11/2012       20.0d         nagement       0000080       Approved       Important       5/14/2012       6/15/2012       20.0d         rdination and Test Move - WG16       0000080       Approved       Important       6/12012       7/13/2012       30.0d	nt - WG 14 - Split Build       0000080       Approved       Important       5/14/2012       5/25/2012       10.0d       1.0d         ordination Remaining PS 9       0000078       Approved       Important       5/14/2012       6/11/2012       20.0d       6.0d         nagement       0000080       Approved       Important       5/18/2012       6/15/2012       20.0d       6.0d         nagement       0000080       Approved       Important       5/18/2012       6/15/2012       20.0d       3.0d	nt - WG 14 - Split Build       0000080       Approved       Important       5/14/2012       5/25/2012       10.0d       1.0d       10%         on - WG 14 - Split Build-out       0000080       Approved       Important       5/14/2012       5/25/2012       10.0d       1.0d       10%         ordination Remaining PS 9       0000078       Approved       Important       5/14/2012       6/11/2012       20.0d       6.0d       30%         nagement       0000080       Approved       Important       5/18/2012       6/15/2012       20.0d       3.0d       15%         rdination and Test Move - WG16       0000080       Approved       Important       6/1/2012       7/13/2012       30.0d       30.0d       10%	nt - WG 14 - Split Build       0000080       Approved       Important       5/14/2012       5/25/2012       10.0d       1.0d       10%       1.0d       10%       1.0d       10%       1.0d       10%       1.0d       1.0d

8. Click on "substitute resource"

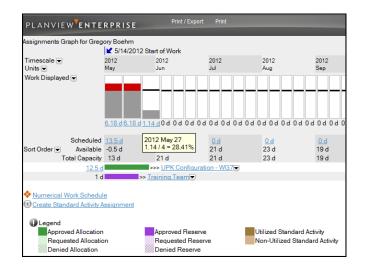
										_	
Description		Work ID	State	Internal Priority ^ -	Start Date ^ -	Finish Date	Duration	Effort	%	Mi J	lu Ju
View Work Detail Review/Update Assignment	nt - WG 14 - Split Build	0000080	Approved	Important	5/14/2012	5/25/2012	10.0d	1.0d	10%	1.0	
	on - WG 14 - Split build-out	0000080	Approved	Important	5/14/2012	5/18/2012	5.0d	2.0d	40%	2.0	
Resource Time on This Work	ordination Remaining PS 9	0000078	Approved	Important	5/14/2012	6/11/2012	20.0d	6.0d	30%	3.92	.1
Substitute Resource 🔶	nagement	0000078	Approved	Important	5/18/2012	6/15/2012	20.0d	3.0d	15%	1.41	.7
■ ✓ Infrastructure Coordination and Test Move - WG16		0000080	Approved	Important	6/1/2012	7/13/2012	30.0d	30.0d	100%	2	1.9.0
■ My ASU Testing - WG 16 - Split Testing		0000080	Approved	Important	6/1/2012	7/13/2012	30.0d	4.5d	15%	3	.2 1.4

9. Click on the reource you wish to substitute.



The person's current work requests will display.





- 10. If the person is available and has the correct resources, click "close".
- 11. Click on the item that you want to substitute the resource for and click "ok"

PLANVIEW ENTERPRISE Print/Export Print			
			And the second sec
Substitute Resources			
Select Resource to Substitute			
Substitute this Resource: Chris Deaton			
Select Substituting Resource			
Replace with this Resource: Gregory Boehm (scheduled assignments)			
Select Work being Substituted			
Level: Work Description	Work ID	Туре	Effort
Project: Peoplesoft HRSA 9.0 Upgrade			
Section 2012 Secti	0000078	Rsrv.	24 h
S>> WG7A - Testing Coordination Remaining PS 9	0000078	Rsrv.	48 h
Project: PeopleSoft HRSA Split - version 9.0			
Project Management - WG 14 - Split Build	0000080	Rsrv.	<mark>8 h</mark>
Sting Coordination - WG 14 - Split build-out	0000080	Rsrv.	16 h
Infrastructure Coordination and Test Move - WG16	0000080	Rsrv.	240 h
My ASU Testing - WG 16 - Split Testing	0000080	Rsrv.	36 h
Select All Work			
<u>Clear selection</u>			
OK Cancel			



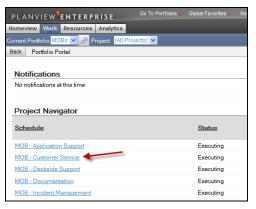
### Authorize Resources to a MOB

You can authorize your people to report time to a MOB.

1. Create a work portfolio that lists the MOB projects you control.

PLANVIEW <b>ENTERPRISE</b>	Go To Portfolios 🚽	Global Favorites 🚽	Notifications
Homeview Work Resources Analytic	s		
Back Homeview Portal			
Notifications			
🐁 Requires Attention (3) 🕴			
Portfolio Navigator			
Portal Type	Portfolio	Items	
Work Portfolio	<u>all uto</u>	31 Projec	cts
Work Portfolio	MOBs	13 Projec	cts
Resource Portfolio	New Portfolio	1 Resour	rces
Resource Portfolio	ppmo	21 Resou	urces

2. Click on the desired MOB project.





When you click on the project, it will open in a new window. There are two panes in the window – tasks appear in the top and resources appear in the bottom.

- 3. Click on the task that you want to authorize or allocate people to.
- 4. Click on the Authorize or Allocate tab in the bottom pane.

roject: M	OB - Training Administration			Watch L	ists 🔻 👎 Gar	ntt 🔒 Resource F	Profile
Column S	Set Progress - Corporate	▼ Filter:	[No Filter] 💌	A Find	S Refresh	Export/Print	P
ine #	Description	Work Status	Actual/Schedule St	tart Actua	al/Schedule Finisł	n Previous Finish	Slip
1)	Project: MOB - Training Admin	nistration Executing					
		a second a second s					
3/					)		
	ut] [ * Insert Child]		6 1 <u>x</u> , 11 12 N	Aulti-Allocate	Pelete	Scher	lule t
+ Inse		• • •		Aulti-Allocate	Delete		hule

- 5. Click the Add button.
- 6. Navigate to find the person.
- 7. Click OK.

Gene	eral Require	Reserve	Allocate Aut	horize Predec	essor Successor	To Do List
						Export/Print
	Resource	Start	Finish	User ID		
	Paul Stoll			pstoll		
	Matthew Robinson			pstoll		
	Melissa VerSchage			pstoll		
	Martha Steinacker			pstoll		
	Gregory Boehm			pstoll		

The person can now find the item under "authorized work" or "allocated work" on their time sheet.



### Fill out your timesheet

You and your employees will be filling out timesheets in Planview. The goal is to accurately describe 100% of the work performed each week, so that UTO can gather accurate data for estimating future projects. To gather this data, UTO is asking every employee to fill in a time sheet that describes their time each week. This must be accomplished by the end of the day Friday of each week.

Time sheets will likely have a combination of different items:

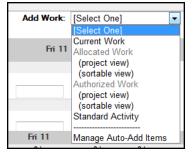
- Project work
- MOB (maintenance of business) work
- Standard activities.

Each week, you will collect the items that you have worked on this week and place them on your time sheet. Then you will fill in the number of hours spent on each item during the week.

PLA	NVIEW <sup>V</sup> ENT	ERPRISE	Go To Portfolios 🗸	Global Favorites 🚽	Notifications				
Homev	iew Work Reso	ources Analytics							
Back	Pick from all Curr	ent Activities to add to	the Timesheet of Re	esource Manager 1					
Sunday	5/6/2012 to Saturd	ay 5/12/2012							
Last	Reported Work								
	Description			Project					
	>	Phase 2 - Develop	oment	RM - F	Project 1				
	Activity	Administrative Du	ties	All Star	ndard Activities				
<u>Selec</u> Clear									
oldar			Add to	Timesheet Can	cel				

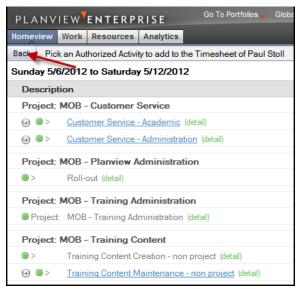
If you have filled out prior timesheets, you may see a screen like the one above that lists the activities from the prior week. If these activities will be on this week's time sheet, click on the check boxes for those items and click on "add to timesheet".

Once you do that, the timesheet will display and you can add more work to the timesheet. From here, you can select "project view" under Allocated work or Authorized work. You can also choose Standard Activity.



After selecting the item, you will see a list of available items that you can add to your time sheet.





Click on the plus sign next to each item that you want to add to your time sheet and then click on the **back** link.

Once you are back on the timesheet, you can then start entering hours spent on each task.

PLAN		RPRISE	Go To Port	folios 🚽 🛛 Global Favo	rites 🚽 🛛 Notifica	ations Timeshe	et Content	Report	s Print
Homeview	Work Resour	rces Analytics							
Back Er	nter Time <mark>&amp;</mark> Billing	g for Resource Man	ager 1						
Sunday 5	5/6/2012 to Sat	urday 5/12/2012	< <u>&lt;</u> View	Time Periods >>		Add Work:	[Select One]		•
	Sun 6	Mon 7	Tue 8	Wed 9	Thu 10	Fri 11	Sat 12	? Т	otal Re
Project: 00	00106 - RM - Proje	ect 1							
> Phase	se 2 - Developmer							<b>0</b> h	
	ndard Activities								
Activit	y Administrative	Duties 💌 🗙						0 h	
	Sun 6	Mon 7	Tue 8	Wed 9	Thu 10	Fri 11	Sat 12	Total	
Total	0 h	0 h	0 h	0 h	0 h	0 h	0 h	<b>0</b> h	
Sign Times	heet with Zero H	ours Sign & Subr	nit				Total & Save	Save 8	Close

As you enter hours, you can click on **Total & save** to see totals for each day and the week.

Click **Save and close** to save what you have done (like when you put hours in mid-week).

Click Sign and Submit to submit your hours to the database.

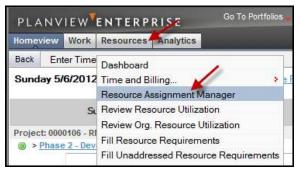


## 8. Review your peoples' work

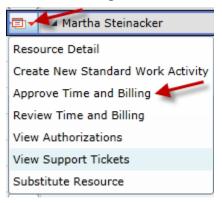
#### **Review Timesheets**

You can see your people's time sheets. To do this:

1. Go to the Resource assignment manager.



2. Click on the down arrow next to a particular employee and choose **Approve Time and Billing**.



3. The next screen lets you select from previous time sheets.

August 2012	July 2012	Period	-	Period
SMTWTFS	SMTWTFS	Starting	Timesheet Status	Number
1 <u>2 3 4</u> 5 <u>6 7 8 91011</u>	1 2 3 4 5 6 7 8 910 11121314	<u>8/26/2012</u>	Nothing this week.	61
<u>12 13 14 15 16 17 18</u> 19 20 21 22 23 24 25	<u>15 1617 18192021</u> 22 2324 25262728	8/19/2012	Overdue.	60
<u>19 2021 2223 24 25</u> 26 2728 <b>29</b> 30 31	22 2324 2320 27 28 29 3031	8/12/2012	Entered, but overdue.	59
		8/5/2012	Approved, but not progressed. (timesheet status)	58
		8/1/2012	Approved, but not progressed. (timesheet status)	57
June 2012	May 2012	7/29/2012	Approved, but not progressed. (timesheet status)	56
SMTWTFS	SMTWTFS	7/22/2012	Approved, but not progressed. (timesheet status)	55
3456789	<u>1 2 3 4 5</u> 6 7 8 9101112	7/15/2012	Approved, but not progressed. (timesheet status)	54
10 11 12 13 14 15 16	13 14 15 16 17 18 19	7/8/2012	Approved, but not progressed. (timesheet status)	53
<u>17 18 19 20 21 22 23</u>	20 21 22 23 24 25 26	7/1/2012	Entered, but overdue.	52
24 25 26 27 28 29 30	27 2829 3031	6/24/2012	Approved, but not progressed. (timesheet status)	51
		01470040		



4. The time sheet will display. You can review it for the data and you can disapprove any or all of it. Doing this for a submitted time sheet will make it editable again.

ear	to Saturday 6/30/2		mer enous	~~						Save &	Suomit Ca
Approve ○↓	Disapprove ▲	Sun 24	Mon 25	Tue 26	Wed 27	Thu 2	B Fri 2	9 Sat 3	0 Weel	dy Total	Remaini Effort
		Project: 0000116	- MOB - Traini	ng Administra	ation						
	0	Project: MOB	- Training Ad	ministration (	<ul> <li>Approved,</li> </ul>	but not progre	essed				
			4 h	7 h	6 h	<b>5</b> h				22 h	
		Project: 0000114	- MOB - Work	shop Delivery							
	$\odot$	> Workshop	Delivery -Aca	demic 💌 🥖	Approved, but no	ot progressed					
			2 h							<b>2</b> h	
		Project: 0000108									
	$\bigcirc$	>> Financial	Aid 🖃 App	roved and prog	ressed			Calc.F	Remain 24h		
						1 h				<b>1</b> h	
	$\odot$	>> DPM		1 2				Calc	Remain 0h		
			2 h	<b>1</b> h	<b>2</b> h	<b>2</b> h				7 h	
	-	All: All Standard									
	$\odot$	Activity Vac	ation 💌 Ap	proved and pro	gressed		<b>0</b> h				
							8 h			8 h	
		Sun 24	Mon 25	Tue 26	Wed 27	Thu 28	Fri 29	Sat 30	Weekly	Total	
tal		0 h	8 h	8 h	8 h	8 h	8 h	0 h	0 h	40 h	

#### Review work done on a task

You can also review the amount of work reported on a task assigned to your people. To look at one specific task for one specific person, do this: do this:

1. Go to the Resource assignment manager.

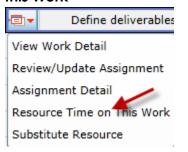




2. Click on the sideways triangle next to an employee's name. This will display the tasks that they are Allocated or Reserved for.

<b>() -</b>	🔺 Martha Steinacker
<b>-</b>	advising 201 - program plan update
	Define deliverables
	Financial Aid
	Administrative Duties
	Professional Development
	Execute Go-live Communication - WG 18C

3. Click on the red down arrow next to a particular task and pick **Resource Time on this Work** 



4. It will show you a summary of the time recorded against that task.

Resource Breakdown S							
Resource: Martha	Steinacker						
Period Starting	Status	Total	Actual (Integrated)	Remain (Integrated)	Reported	Remain after reported	Contributor Estimate
Sunday, April 22, 2012	Entered, but not signed				0.25 d	3.88 d	NA
Sunday, May 20, 2012	Approved and Progressed				0.5 d	3.88 d	NA
Sunday, May 27, 2012	Approved and Progressed				0.38 d	3.88 d	NA
Sunday, July 01, 2012	Entered, but not signed				0 d	3.88 d	NA
Sunday, August 12, 2012	Entered, but not signed				0.25 d	3.62 d	NA
Total		5 d	0.88 d	4.12 d	1.38 d		

The Reported hours total and the Actual (integrated) hours may not match, depending on when the database was last progressed. Actual (integrated), Remaining, and Total will only be calculated for a work item and not for each time period.

X Close

### View a report of Time entered

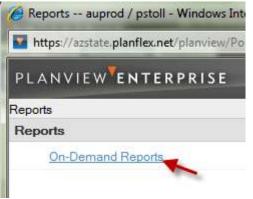
You can see summary reports of the time entered by your people.



1. Click on the **Reports** menu item at the top of the screen.



2. A new window will open. Click on **OnDemand Reports** 



3. Choose from the different reports. We will show you one here. You can explore the others. Click on **Resource Timesheets Organized by Period** 





4. Select the date range for the report

Homeview Requests V	lork Resources A	nalytics	
Current Portfolio: Paul's G	roup 💌 🥜		9
Back Planview Report F	arameters		
Parameters			
User Periods		1	
Start Date		8/19/2012 -	
Finish Date		8/26/2012 -	
Execution Options	<i>,</i>		
View Report	Cancel	Print View	w in Excel

then select either View Report or View in Excel

5. The report shows you a summary of reported hours.

	·		, ,										
Back O	Back On-Demand Report												
Timesheets by Period Resource Timesheets Organized by Period													
Week Of	Resource	<u>Type</u> ▲ <u>1</u>	Work Description ▲2	Reported ▲3 SUN	▲ <u>4 MON</u> 4	<u>5 TUE</u>	<u>6 WED</u>	<u>7 THU</u> ▲	<u>8 FRI</u> ▲9	SAT	. <u>10</u>		
8/1/2012	Home Home	Work	Customer Service - Academic	12	0	0	0	4	4	4	0		
		Work	Customer Service - Administration	12	0	0	0	4	4	4	0		
				24	0	0	0	8	8	8	0		
	Analitis:	Work	advising 201 - program plan update	9	0	0	0	3	1	5	0		
		Work	MOB - Training Administration	7	0	0	0	3	1	3	0		
		Work	Training Content Maintenance - non project	6	0	0	0	2	4	0	0		
		Work	Workshop Delivery - Administrative	2	0	0	0	0	2	0	0		
				24	0	0	0	8	8	8	0		
	- Million Contractor	Standard Work	Administrative Duties	2	0	0	0	0	2	0	0		
		Standard Work	Sick Leave	8	0	0	0	8	0	0	0		
		Work	advising 201 notes and holds	6	0	0	0	0	4	2	0		
		Work	Training Content Creation - non	4	0	0	0	0	1	3	0		



# Help and Further training

#### Planview Prisms training

#### https://www.planviewprisms.com

Each ASU employee who has access to Planview also has access to online, self-paced training directly from PlanView. The website is called Planview Prisms. Here is how to access them.

Go to the URL above. Login with your ASURITE ID and the password provided by PPMO when they set up your ASU PlanView account.



Click on the **Education** link



Click on **My Courses** 



You will see a list of classes that are on your "enablement path". Each ASU employee has a set of courses relevant to their role in Planview.

If you need immediate help, email <u>ppmo@asu.edu</u> or start a JIRA ticket in the Planview project.

For further information, go to <a href="http://links.asu.edu/ppmo">http://links.asu.edu/ppmo</a>