Technical Assistance:

email: PPMO@asu.edu

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

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

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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".

Type	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 ppmo@asu.edu 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

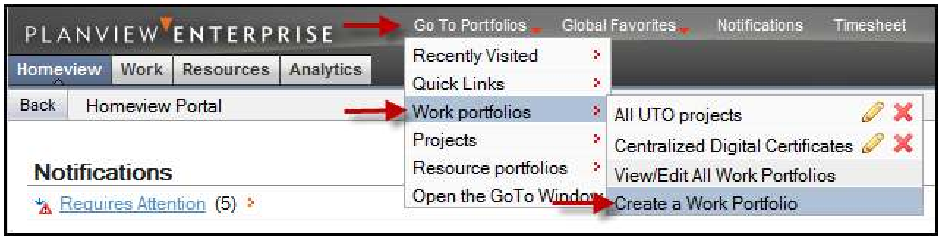
Once you have an account, login to Planview at https://www.asu.edu/planview
NOTE: Works best if viewed with Internet Explorer.

3. Create portfolios

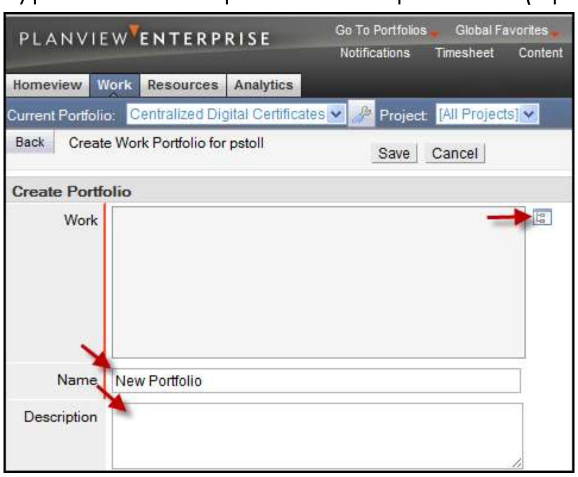
A portfolio is a collection of projects or resources .

Create a Work Portfolio

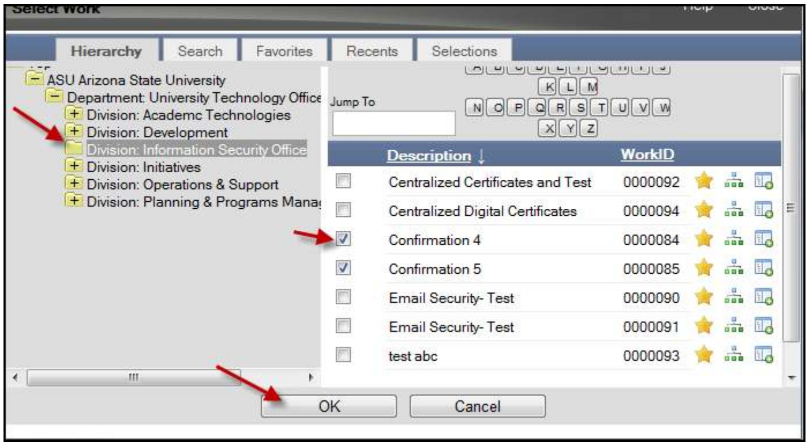
1. Click on **Go to Portolios > Work portfolios > Create a Work Portfolio**



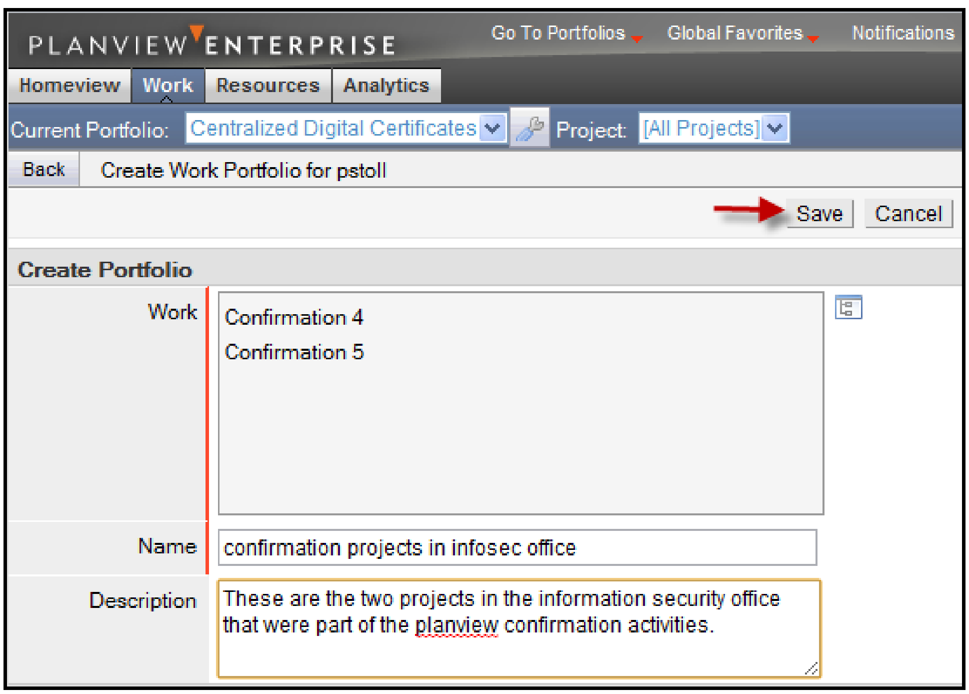
2. Type in a name for the portfolio.
3. Use the data picker to select the projects for your portfolio.
4. Type in a description of the portfolio (optional)



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**.

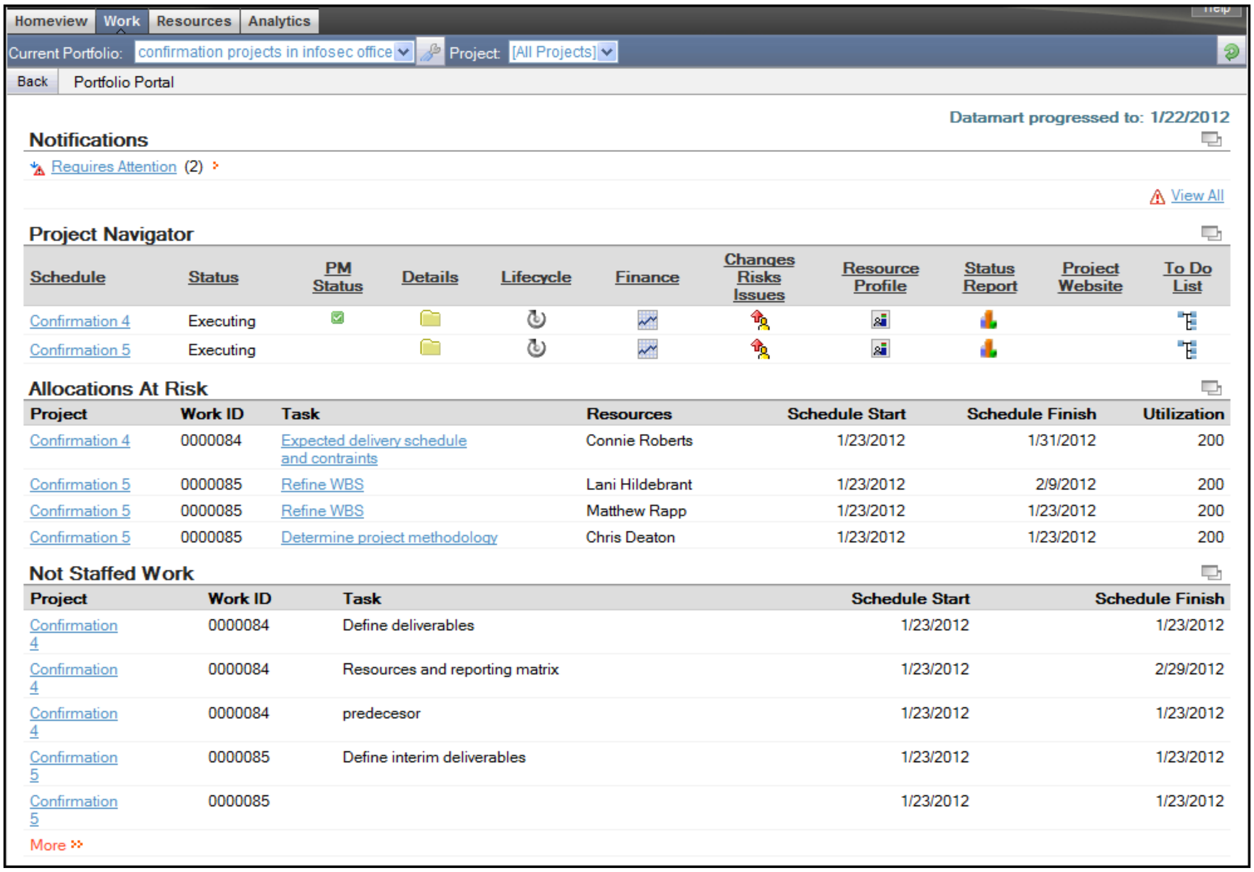


8. Click **Save**.



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.



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.

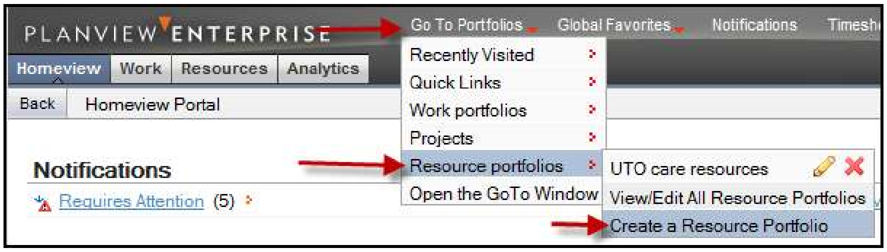
To get back to the homepage, click **Homeview** and then **Dashboard.**

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

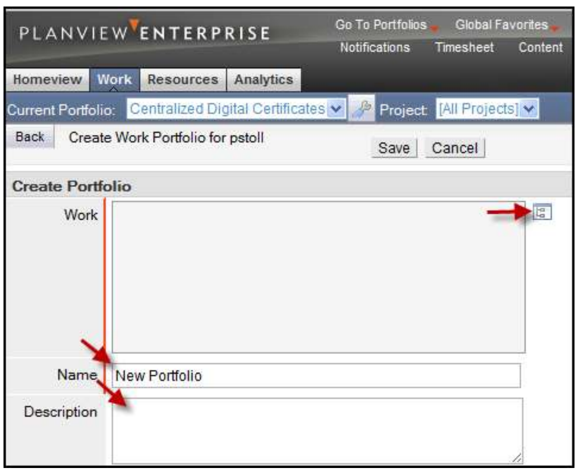
Create a Resource Portfolio

A resource portfolio is a collection of people in Planview.
You must set up a portfolio to use the resource assignment manager.

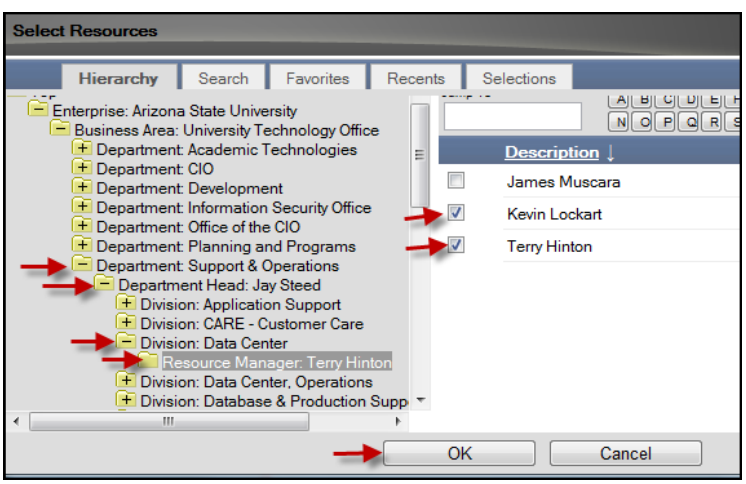
1. In the top bar click **Go to Portolios > Resource portfolios > Create a Resource Portfolio**



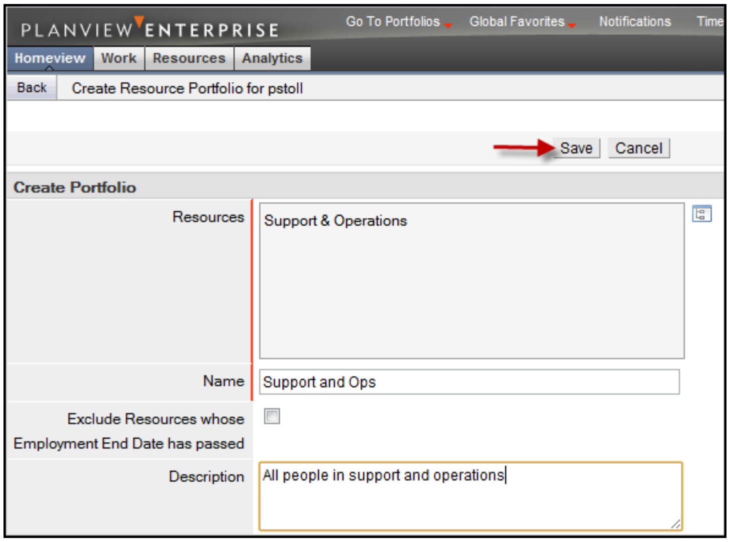
2. Type a name for the portfolio in the *name* field.
3. Fill in the *description* field as well, if desired.
4. To fill in the *resource* field, click on the *select work* button next to the field.



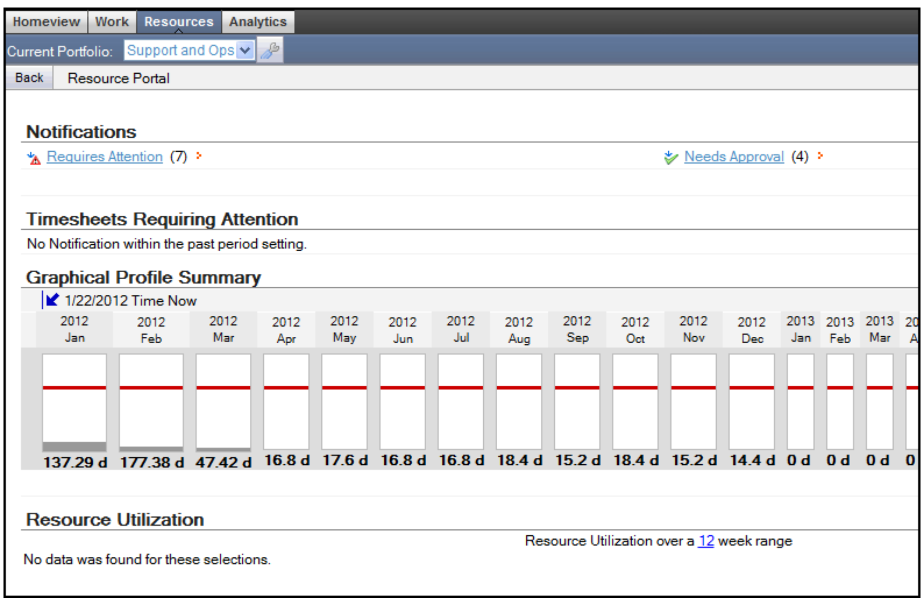
5. Navigate through the folders on the left to get to the desired level of resources.
6. Click on the checkboxes next to the resources you want in your portfolio.
7. Click **OK**.



8. Click **Save**.



You wil be presented with your portfolo screen.



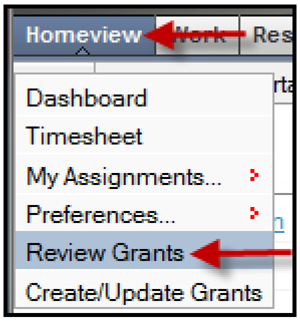
The default view shows a timeline, with a red line indicating where "fully loaded" for those resources. In this example, no requests for resources time have been put into Planview yet, so no data appears on this example screen.

4. Grants

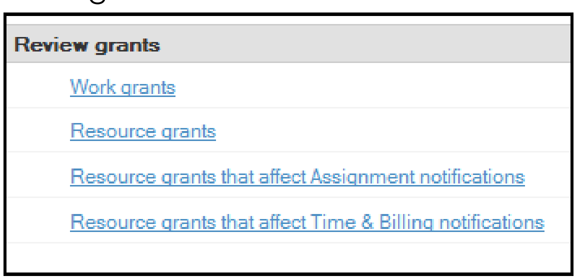
"Grants" are the way that people are given different levels of access in Planview.
"Work Grants" allow people to view or edit projects.
"Resource Grants" allow people to view and manage resources.
Planview administrators do the majority of this work.
Project managers can grant work grants to projects that they manage.
Resource managers can view their own resource grants.

Review your grants:

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

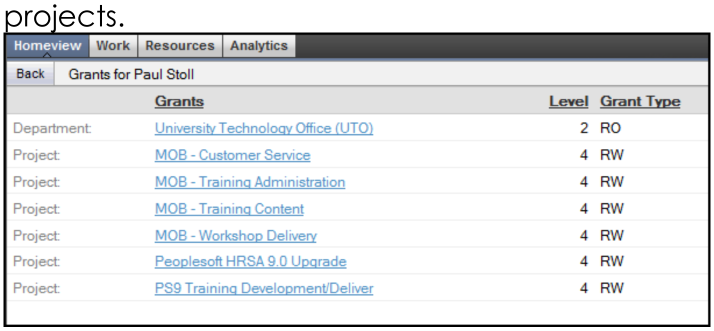


2. There are four types of grants. Click on each link to see the grants that you have been given.



Work Grants

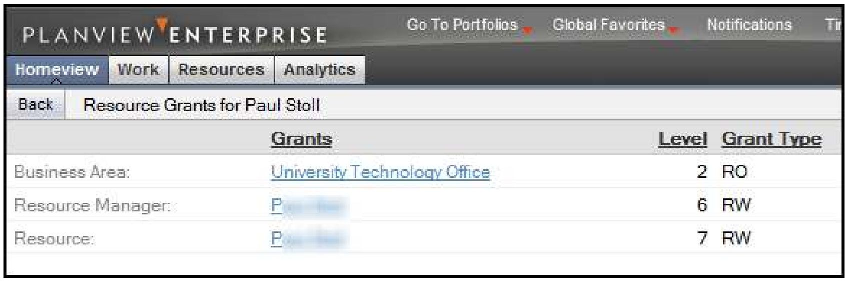
This example shows that this person has read only (RO) access to all of the projects in the UTO department, and Read Write (RW) access to several specific projects.



	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

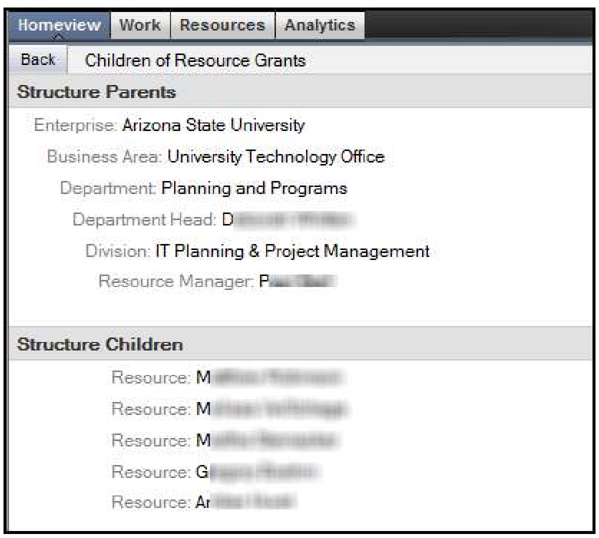
Resource grants will allow you to approve resources time, review time put into timesheets, change their roles and manage their work on projects. After clicking on Resource grants, you will likely see something like the below.



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*.

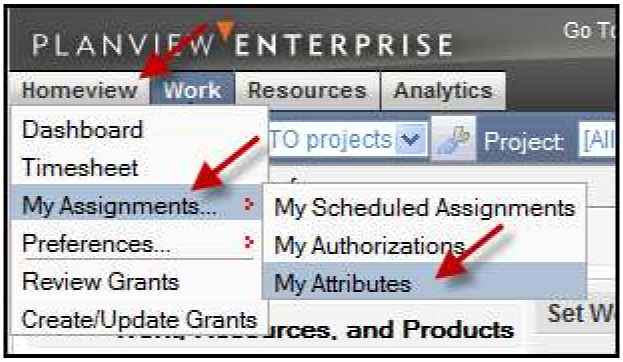
Click on the name across from the *Resource Manager* label and you will see the resources that report to that resource manager.



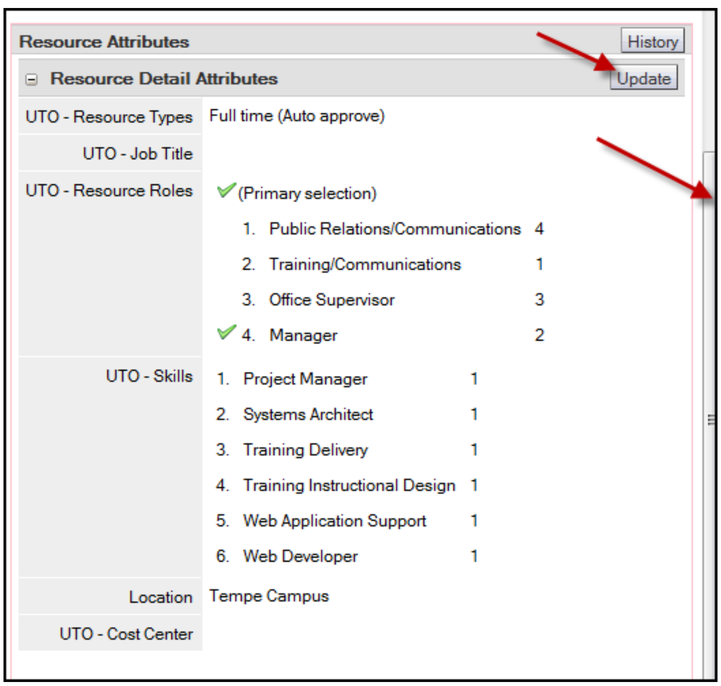
5. View your PlanView Profile

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

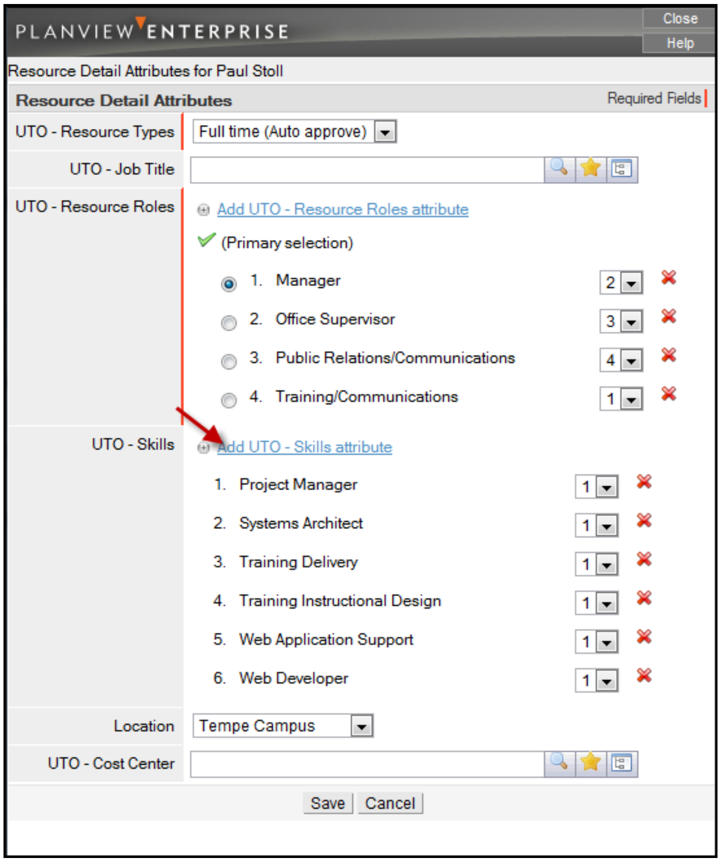
1. In PlanView, click on **Homeview > My Assignments > My Attributes**



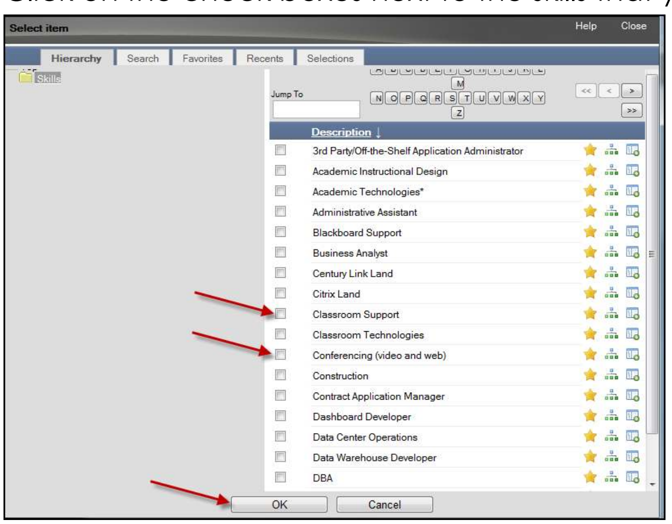
2. Scroll to the bottom and click on **Update** next to the *Resource Detail Attributes.*



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



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

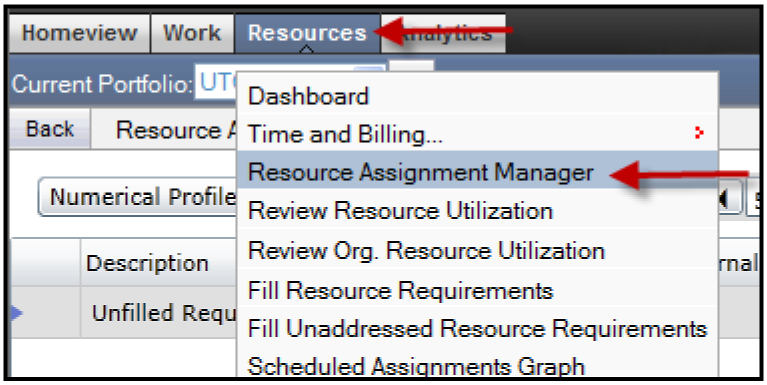


5. Rank your skills as most prevalent (1) to least prevalent (larger number) click Save.

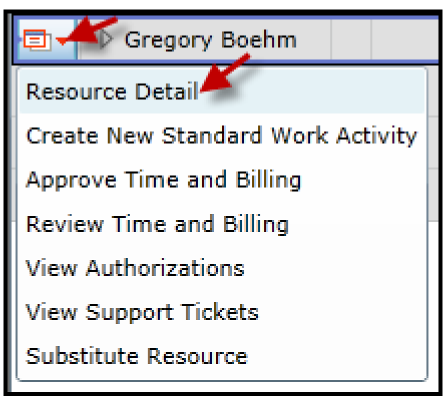
6. Define Role for your Team Members

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.

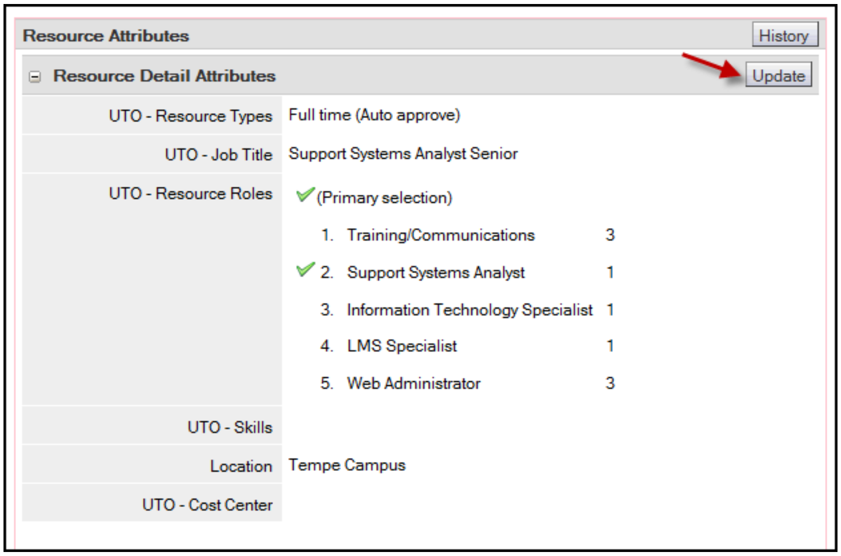
To define the role for a team member, follow these steps:
In PlanView, click on **Resources > Resource Assignment Manager**

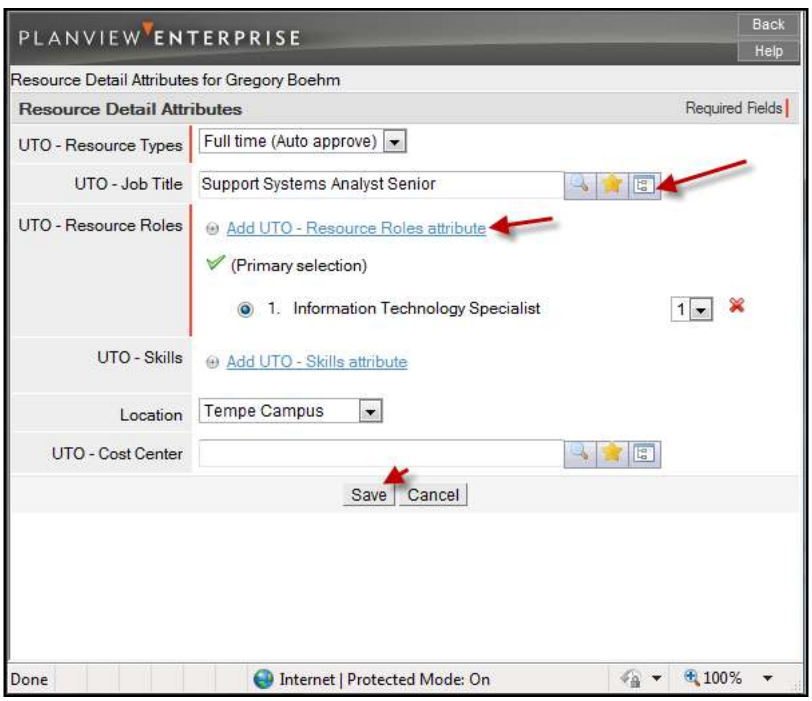


You will see a page that shows all of the people that report to you (according to Planview)
Click on the red down arrow next to a resource's name and choose **resource detail.**



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





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

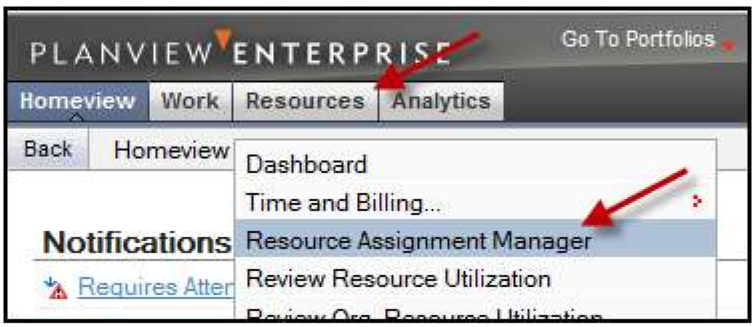
The most important work you will do in Planview is to manage your people.
This includes:

- 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.

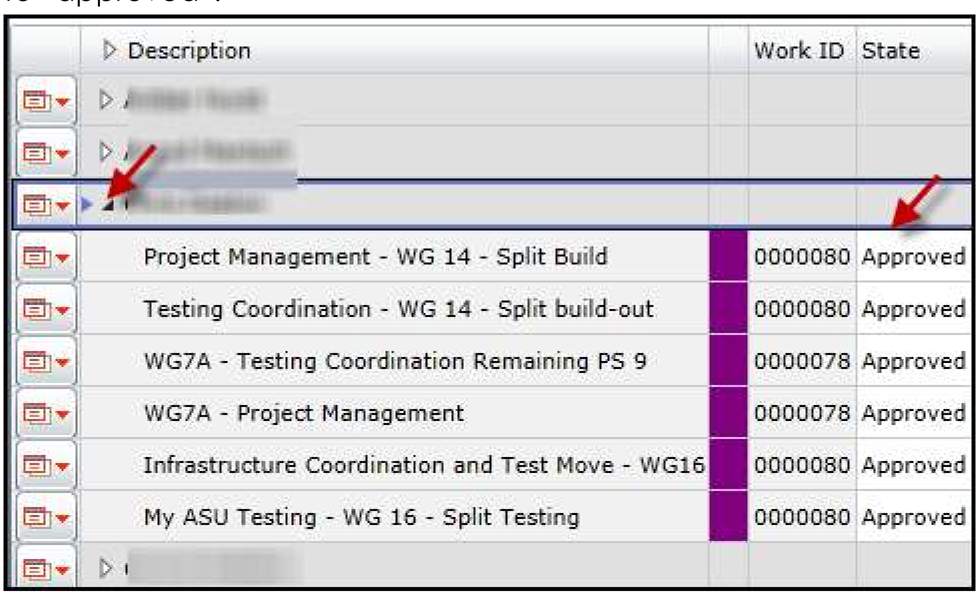
Approve Requests

Project managers will request time of your employees.
Approve these requests from the resource assignment manager.

1. Go to the Resource Assignment Manager (RAM)



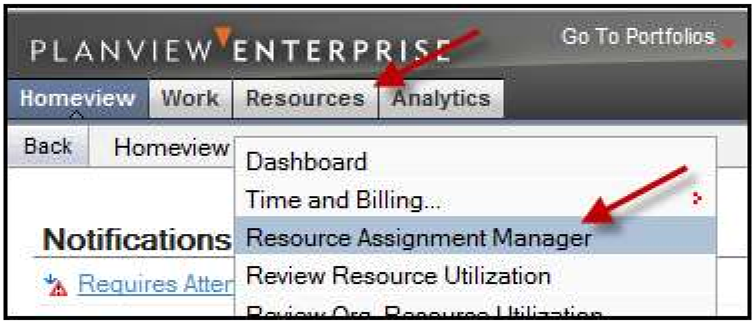
2. Expand the list of requested tasks for each person.
3. Double click on the "State" column item to change the value from "requested" to "approved".



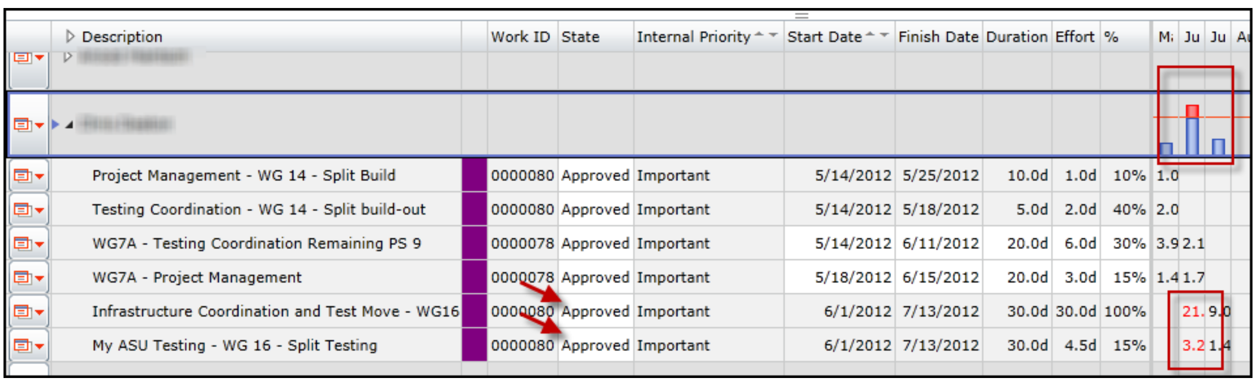
Deny a request

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

1. Go to the resource assignment manager.



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".



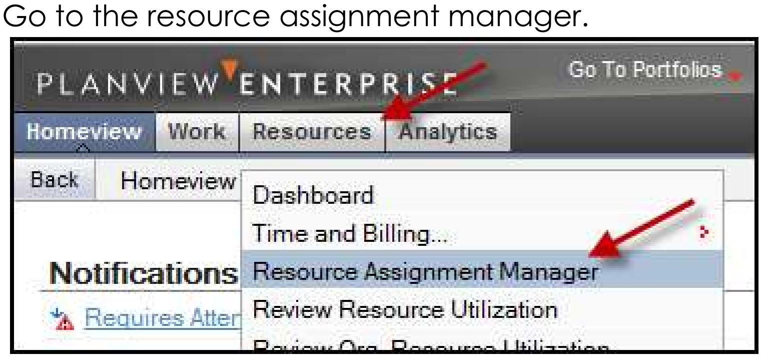
Description	Work ID	State	Internal Priority	Start Date	Finish Date	Duration	Effort	%	M	Ju	Ju	A
Project Management - WG 14 - Split Build	0000080	Approved	Important	5/14/2012	5/25/2012	10.0d	1.0d	10%	1.0			
Testing Coordination - WG 14 - Split build-out	0000080	Approved	Important	5/14/2012	5/18/2012	5.0d	2.0d	40%	2.0			
WG7A - Testing Coordination Remaining PS 9	0000078	Approved	Important	5/14/2012	6/11/2012	20.0d	6.0d	30%	3.9	2.1		
WG7A - Project Management	0000078	Approved	Important	5/18/2012	6/15/2012	20.0d	3.0d	15%	1.4	1.7		
Infrastructure Coordination and Test Move - WG16	0000080	Approved	Important	6/1/2012	7/13/2012	30.0d	30.0d	100%		21.	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	

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

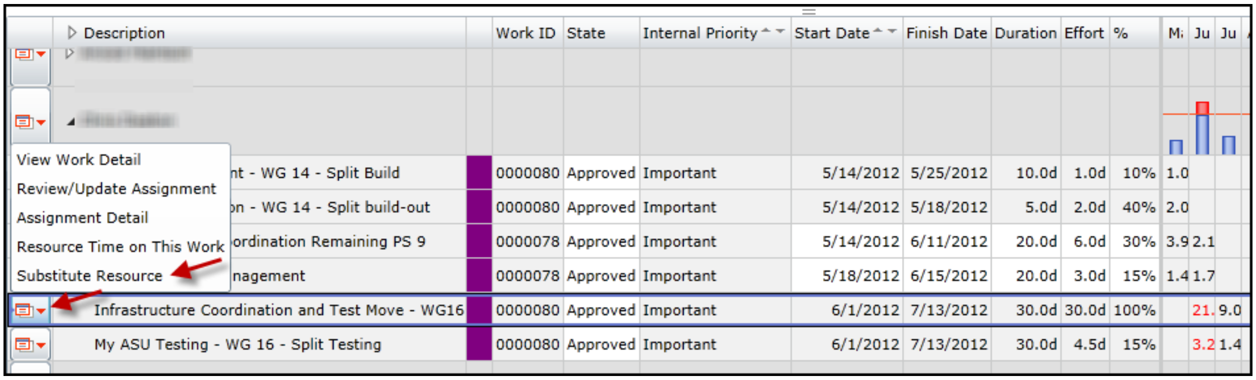
If a person is overbooked, you can substitute a different resource for that task.

5. Go to the resource assignment manager.

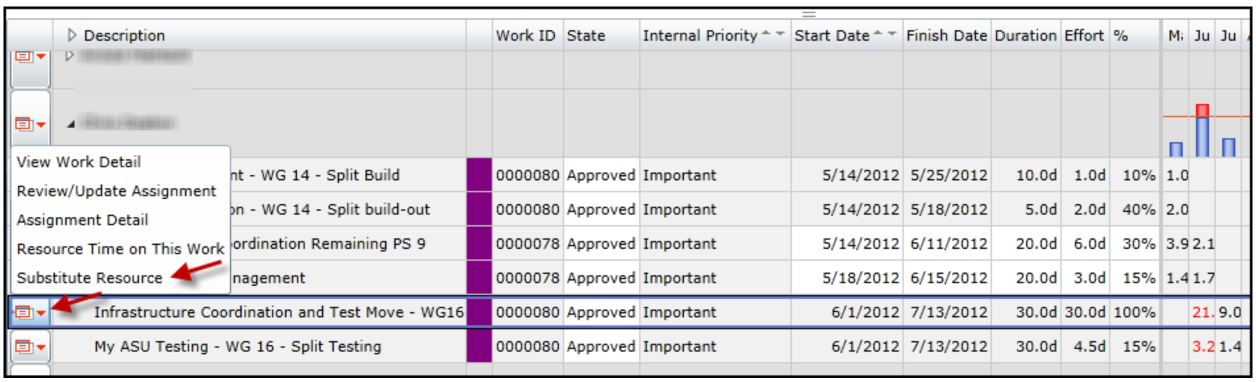


6. Expand the list of requested tasks for each person.

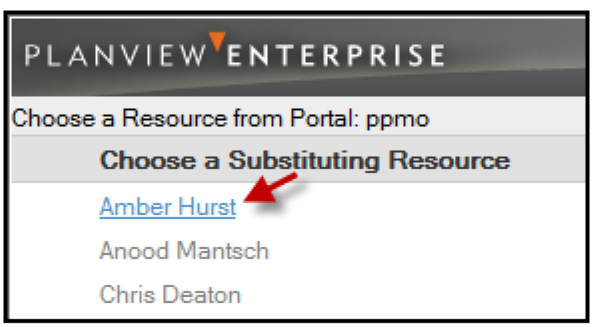
7. Click on the red action arrow for an item that is overbooked and choose “Substitute Resource”.



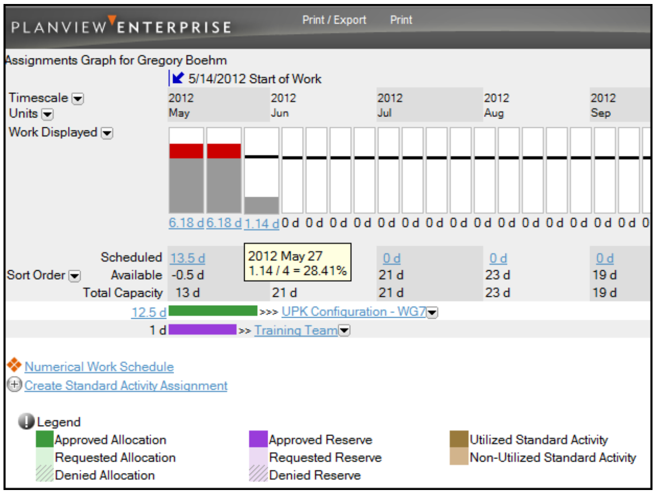
8. Click on “substitute resource”



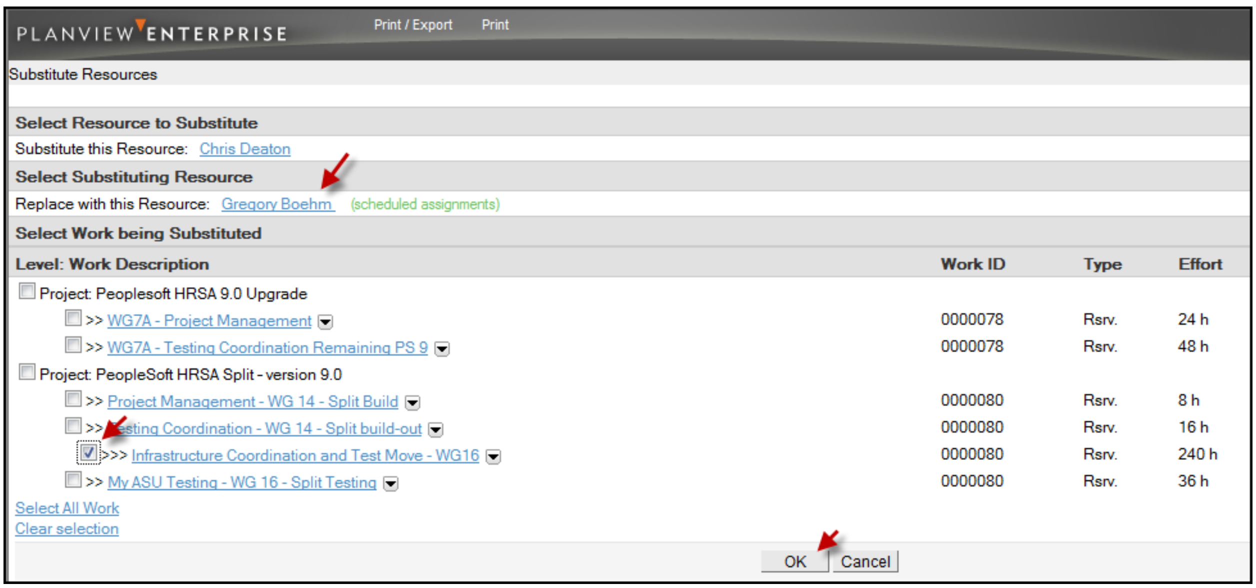
9. Click on the reource you wish to substitute.



The person’s current work requests will display.



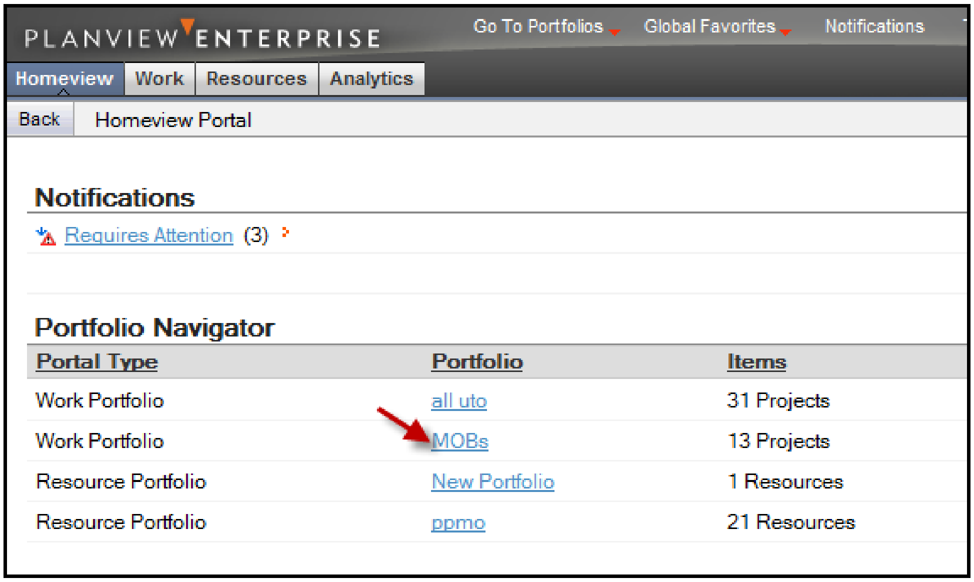
10. If the person is available and has the correct resources, click “close”.
11. Click on the item that you want to substitute the resource for and click “ok”



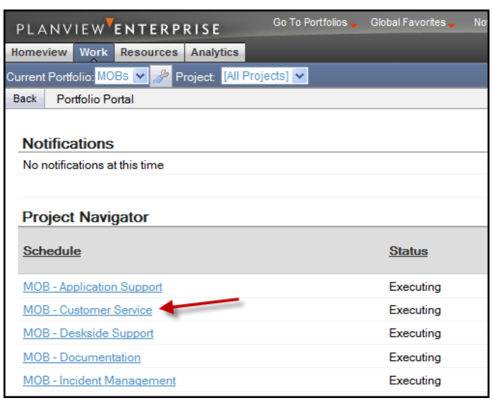
Authorize Resources to a MOB

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

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

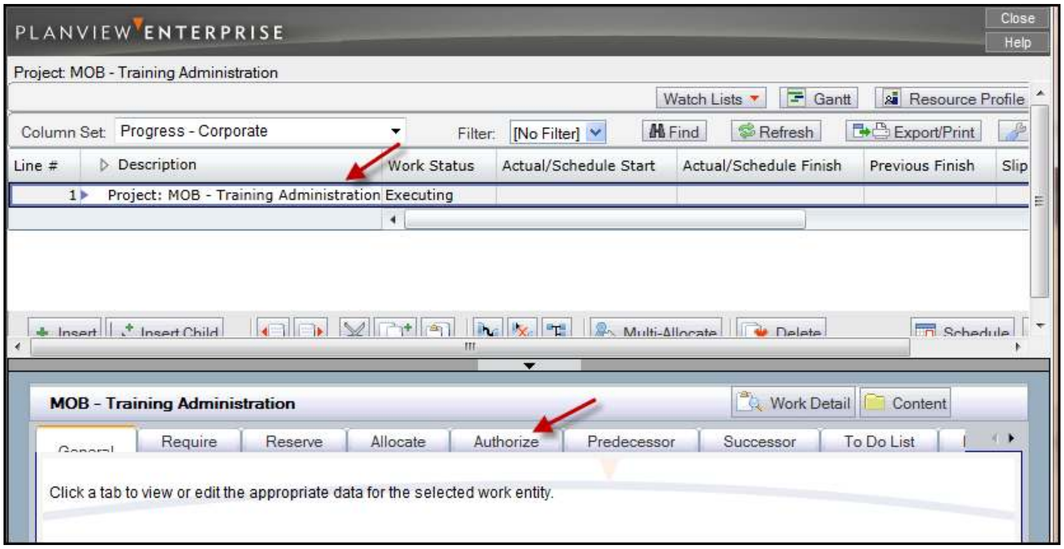


2. Click on the desired MOB project.

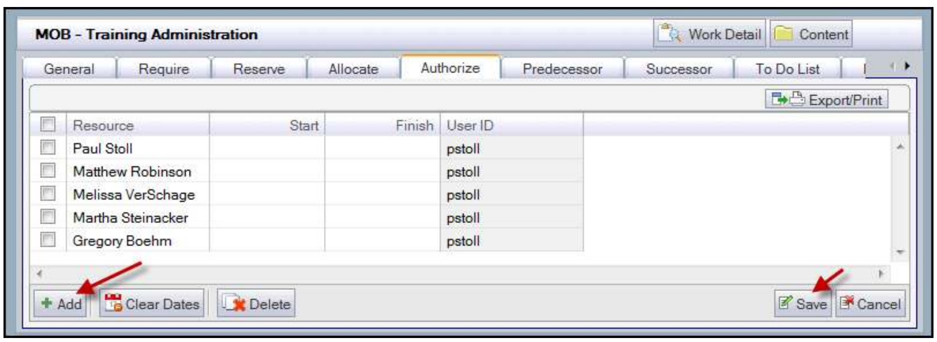


When you click on the project, it will open in a new window.
There are two panes in the window – tasks appear in the top and resources appear in the bottom.

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.



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



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

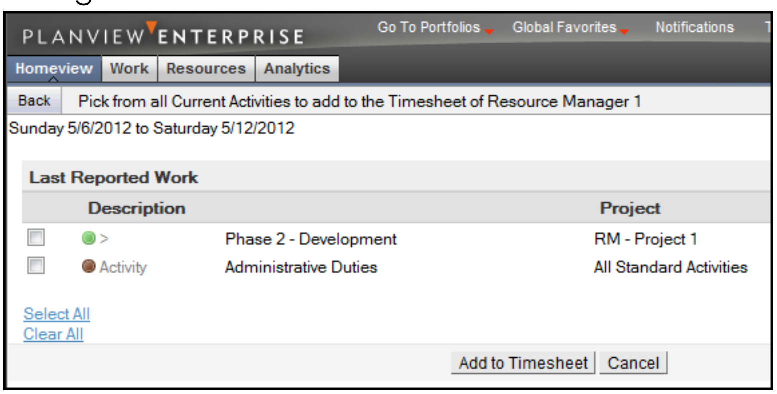
Fill out your timesheet

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:

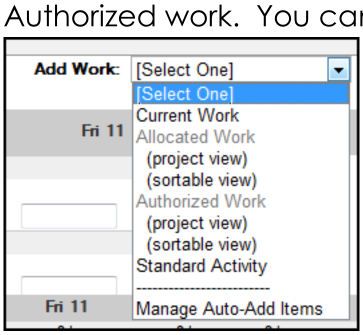
- Project work
- MOB (maintenance of business) work
- Standard activities.

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.

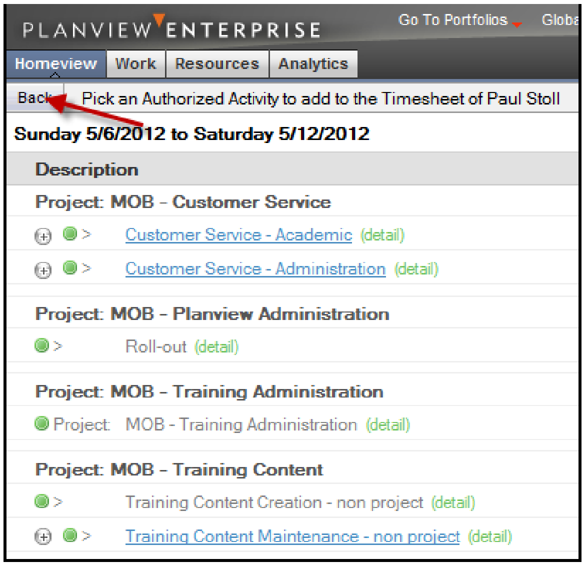


If you have filled out prior timesheets, you may see a screen like the one above that lists the activities from the prior week. If these activities will be on this week's time sheet, click on the check boxes for those items and click on "add to timesheet".

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.

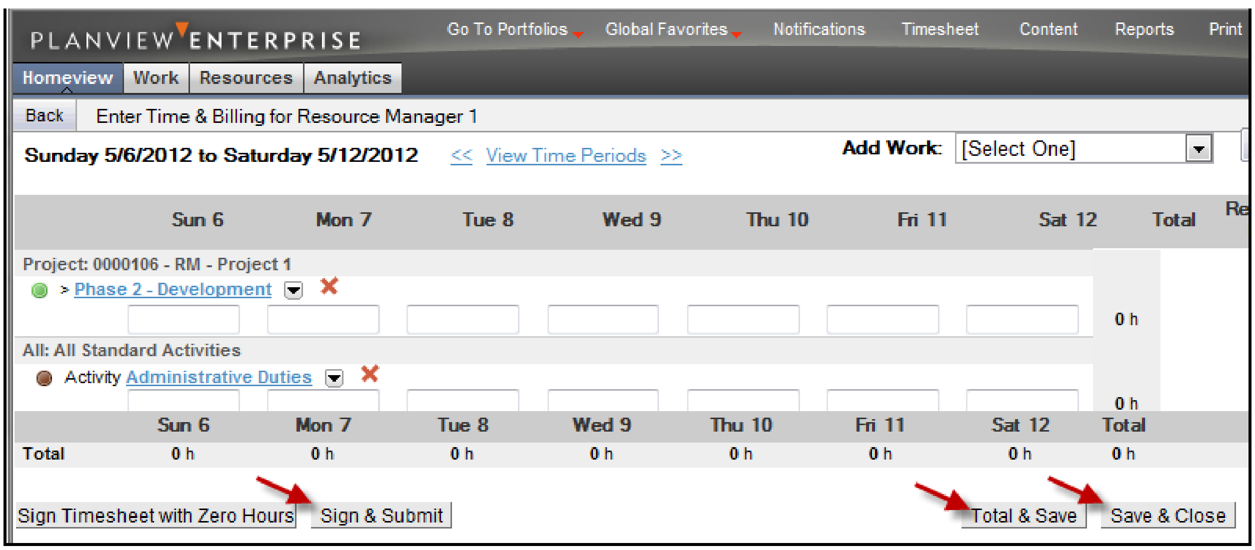


After selecting the item, you will see a list of available items that you can add to your time sheet.



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.



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).

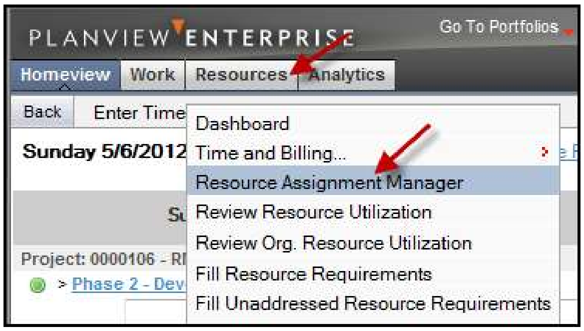
Click **Sign and Submit** to submit your hours to the database.

8. Review your peoples' work

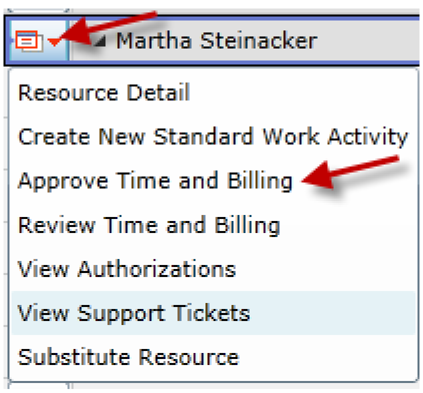
Review Timesheets

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

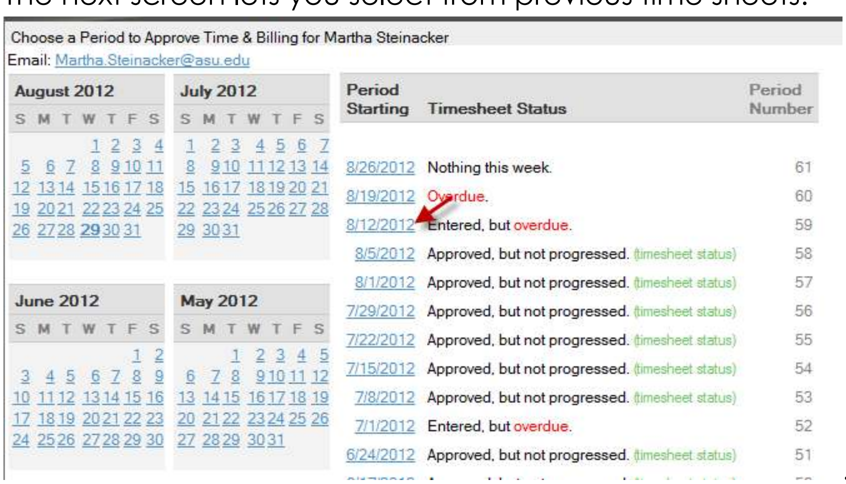
1. Go to the Resource assignment manager.



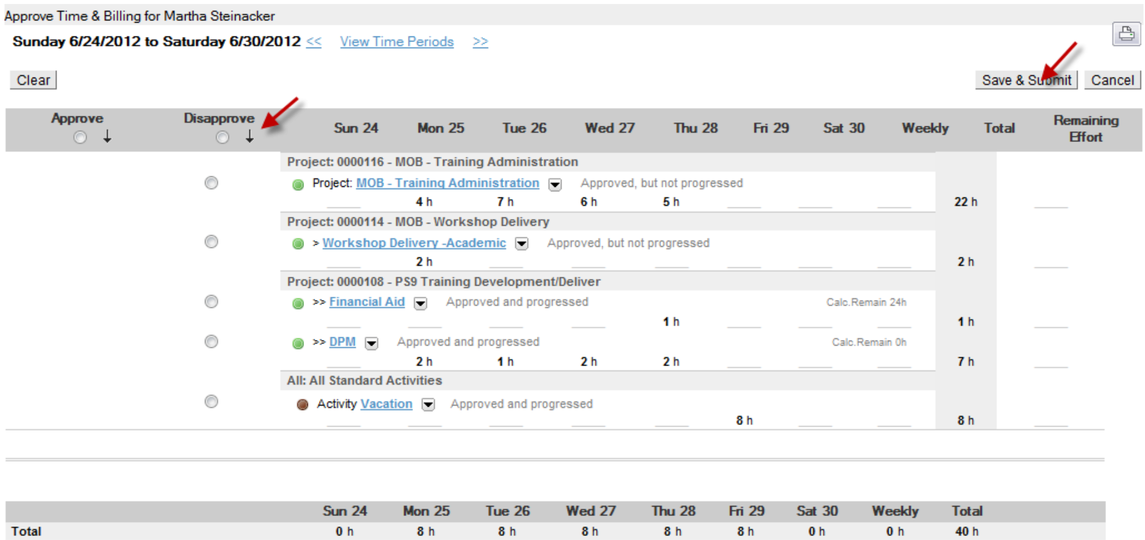
2. Click on the down arrow next to a particular employee and choose **Approve Time and Billing**.



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



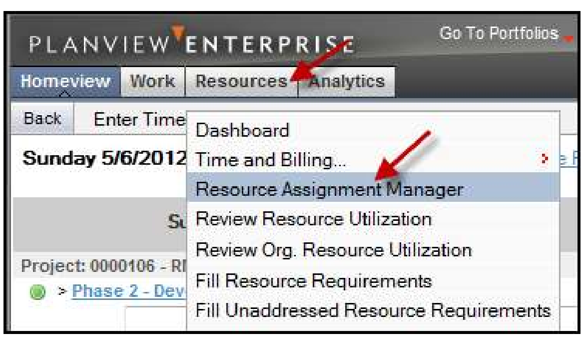
4. The time sheet will display. You can review it for the data and you can disapprove any or all of it. Doing this for a submitted time sheet will make it editable again.



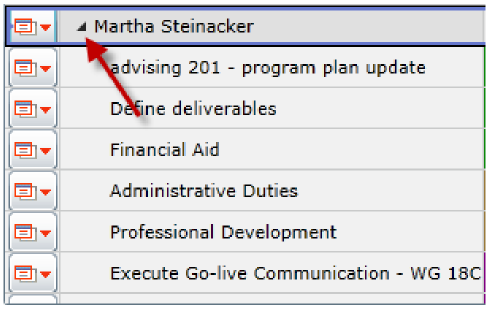
Review work done on a task

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:

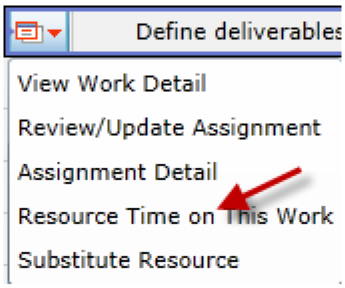
1. Go to the Resource assignment manager.



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



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 Structure

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		

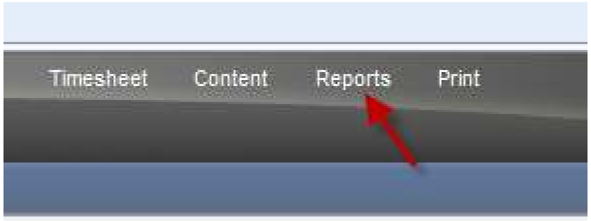
The Reported hours total and the Actual (integrated) hours may not match, depending on when the database was last progressed. Actual (Integrated), Remaining, and Total will only be calculated for a work item and not for each time period.

Close

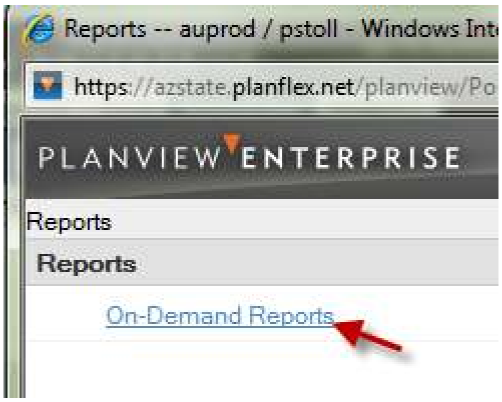
View a report of Time entered

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

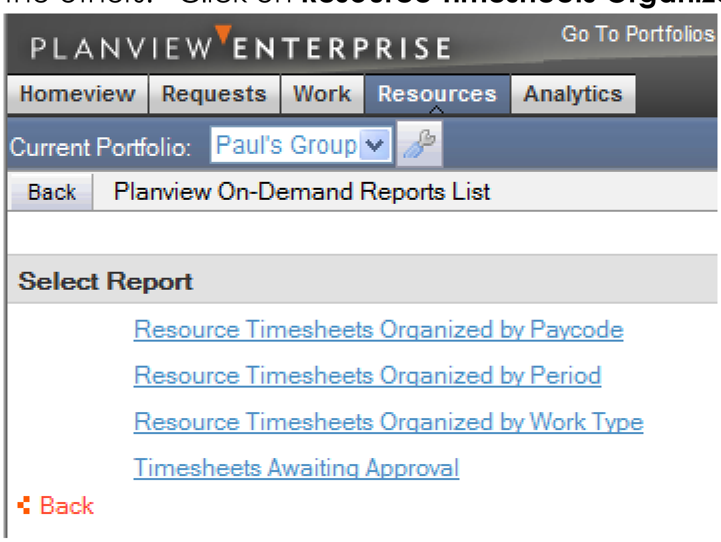
1. Click on the **Reports** menu item at the top of the screen.



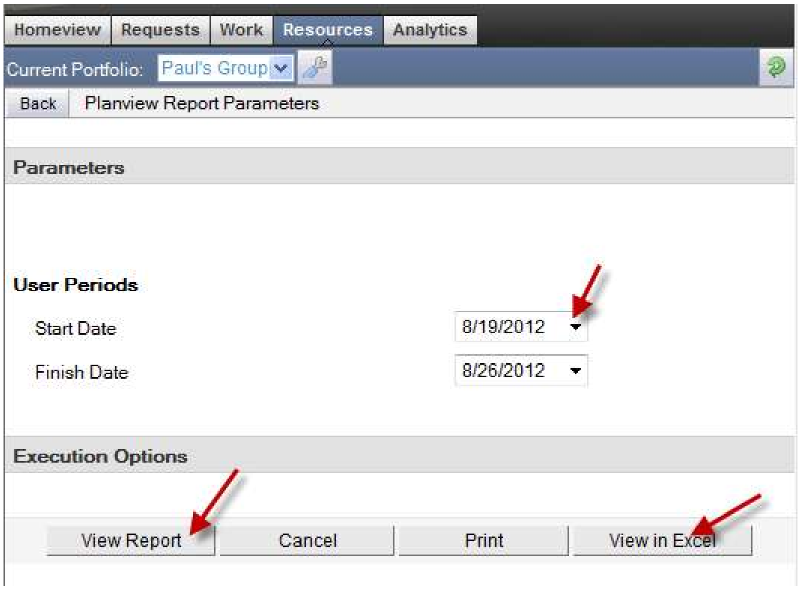
2. A new window will open. Click on **OnDemand Reports**



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

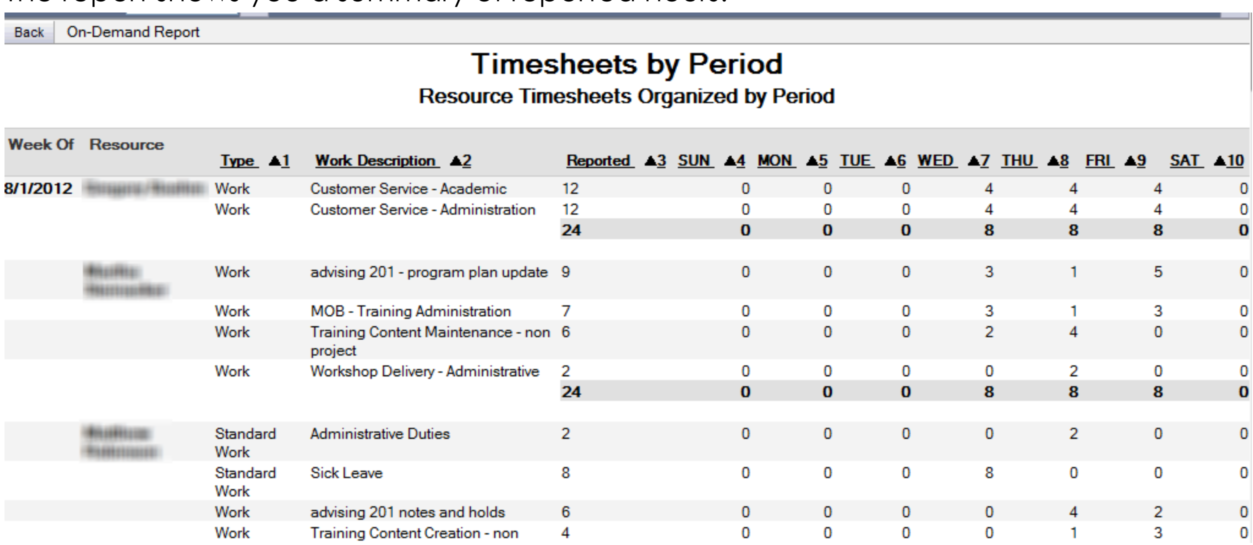


4. Select the date range for the report



then select either **View Report** or **View in Excel**

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



Timesheets by Period
Resource Timesheets Organized by Period

Week Of	Resource	Type ▲1	Work Description ▲2	Reported ▲3	SUN ▲4	MON ▲5	TUE ▲6	WED ▲7	THU ▲8	FRI ▲9	SAT ▲10
8/1/2012	[illegible]	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**
	[illegible]	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**
	[illegible]	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

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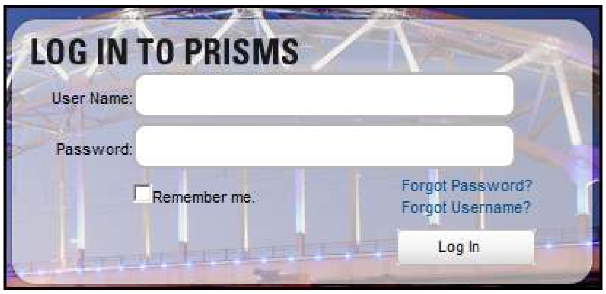
Help and Further training

Planview Prisms training

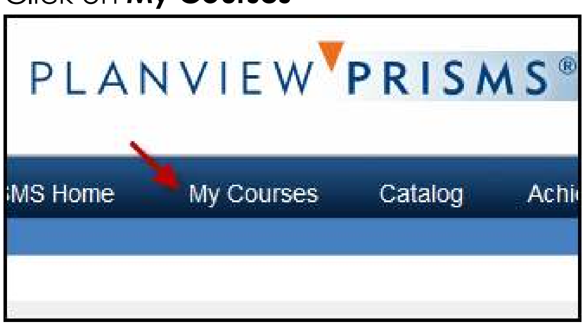
https://www.planviewprisms.com
Each ASU employee who has access to Planview also has access to online, self-paced training directly from PlanView. The website is called Planview Prisms. Here is how to access them.

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 ppmo@asu.edu or start a JIRA ticket in the Planview project.
For further information, go to http://links.asu.edu/ppmo