

Quick Reference Guide: CA Clarity PPM Time Entry

Logging into Clarity

1. In your browser window, navigate to your organization's Clarity URL.
2. Save the link as a favorite, or create a shortcut on your desktop.
3. Enter your **User Name** and **Password**.
4. Click **Login** or press **Enter**. Users are typically required to change their password upon their initial login. Once the password has been successfully entered, the default Personal Overview screen appears.

Changing Your Password

1. Click **Account Settings** from the **Home** menu.
2. In the Change Password portlet at the bottom of the page, enter your old password, new password, and confirmation of your new password.
3. Click **Save**.

Accessing Your Timesheet

1. Click the **Timesheets** option under the **Home** link in the navigation bar to display available timesheets.
2. Click the **Blue Clock** icon  to the left of the time period you wish to submit. The timesheet is displayed.

Adding Tasks

Clarity provides two ways in which tasks may be added to a timesheet. The first automatically populates the timesheet with all the tasks to which you are assigned within a time period specified by your Clarity administrator (typically one week in the past through one week in the future). The second simply allows you to manually add tasks to the timesheet, regardless of when the task is scheduled.

Populate Tasks

1. With the timesheet displayed, click the **Populate** button to add all tasks to which you are assigned within the specified time window. These tasks will automatically appear on the timesheet

Manually Add Tasks

1. Click the **Add Task** button. The *Select Tasks* screen is displayed, providing a list of available tasks.
2. Update the filter criteria, if necessary to locate the task(s) you wish to add. If enabled by your PM, update the **Show Tasks** filter to *All* to display tasks to which you are not specifically assigned but for which you are a member of the project team.
3. Click the checkbox beside one or more tasks, then click either **Add** or **Add and Select More**:
 - **Add** adds the selected tasks and *returns* to the timesheet.
 - **Add and Select More** adds the selected tasks and *stays* in the Select Tasks screen.

Deleting Tasks

1. To remove a task from your timesheet, select the checkbox of the associated task.
2. Click the **Delete** button. The task will be deleted from the timesheet only, not from the project.

Entering Time

1. Once you've populated all the relevant tasks, enter your hours in the fields provided.
2. If more or fewer hours are needed to complete the task, modify the ETC value for that task by adjusting the value provided to the right of the task. The project Manager will be notified of the requested change.
3. Click the **Save** button to calculate the hours that have been entered. It is good practice to enter and save time on a daily basis.
4. Once time entry is complete, click **Submit for Approval**.

Reviewing, Approving & Returning Timesheets

Once the timesheet has been submitted, it is typically the Project or Resource Managers' responsibility to review the timesheet for accuracy, and approve it prior to the agreed-upon approval deadline.

1. To review a timesheet, click the **Timesheets** option under the **Home** link in the navigation bar. Use the filter to identify the resource, time period and status of the timesheet you wish to review. Click the **Blue Clock** icon  to access the selected timesheet.
2. Review the timesheet; if the data appears correct, click **Approve** (or indicate your approval in an alternate method as dictated by your organization). The approved timesheet will be posted the next time the *Post Timesheets* job is run.
3. If the timesheet data is incorrect, return it to the submitter by clicking the **Return Timesheet** button located at the bottom of the screen. Add a timesheet note as an explanation for the returned timesheet.

Modifying Returned Timesheets

You will likely receive an email notification if your timesheet is returned. Follow the steps below to modify a returned timesheet:

1. Click the link in the email notification to access the timesheet directly, or navigate to the **Timesheets** link in Clarity. Filter for *Open* timesheets, then locate the timesheet with a status of *Returned*. Click the **Blue Clock** icon to access the returned timesheet.
2. Click the **Notes** icon  in the upper right to review any comments provided by the PM regarding the returned timesheet.
3. Make any necessary changes, then click **Submit for Approval**.

Adjusting Posted Timesheets

Approved timesheets are posted when the posting job is run. If a correction or modification to a timesheet is required after posting, you will be required to create and submit a Timesheet Adjustment.

1. Click the **Timesheets** option under the **Home** link in the navigation bar.
2. Utilize the filter criteria to locate the timesheet you wish to adjust. In the *Timesheet Status* field, select the **Posted** option.
3. Click **Filter** to display all posted timesheets for the available time periods.
4. Click the **Blue Clock** icon  to access the timesheet requiring adjustment.
5. Click the **Adjust** button to open an Adjustment Timesheet. You may toggle to the original timesheet by clicking the **Adjusted Timesheet** link at the top of the screen.
6. Make the necessary changes and click **Save** to save your changes and update the totals. The **Delta View** link at the bottom of the page allows you to compare both the Adjusted (original) Timesheet and Adjustment Timesheet (new) on the same screen.
7. Click the **Submit for Approval** button. Adjusted timesheets will be posted at the next time the posting job is run
8. Note that two versions of the timesheet will now exist – the original, or *Adjusted* timesheet, and the new *Adjustment* timesheet.

Clarity Support

For Clarity Support, contact Rego Consulting:

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regoconsulting

Helping you maximize your investment in CA Clarity

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Access this week's timesheet from anywhere within Clarity

Home Favorites [Refresh] [Home] [Search] [Help]

Timesheet

Time Period: 9/10/12 - 9/16/12 [Dropdown] [Edit]

Resource Name: Member Team [Dropdown] Modified by: Member Team [Dropdown]

Timesheet Status: Open Last Modified: 9/6/12 1:37 PM

	Investment	Description	Mon 9/10	Tue 9/11	Wed 9/12	Thu 9/13	Fri 9/14	Sat 9/15	Sun 9/16	Total	ETC
<input type="checkbox"/>	Training Project 1	Identify Infrastructure Requirements					2.00			11.00	40.00
<input type="checkbox"/>	Training Project 1	Define Scope Change and Control Process	4.00			4.00	2.00			10.00	9.00
<input type="checkbox"/>	Training Project 1	Define Resource Plan	2.00	5.00	2.00	4.00	2.00			15.00	15.00
<input type="checkbox"/>	Training Project 1	Database Development					2.00			2.00	47.00
		Total	8.00	8.00	8.00	8.00	8.00			30.00	

Buttons: Add Task, Split, Delete, Save, Submit for Approval, Populate, Cancel, [Configure], [Printable Version]

Navigate among available timesheets

Add note related to timesheet

Project/Investment and Task Name

New Proposed ETC

15.00

Add note related to specific task

Select individual tasks to add to timesheet

Add/remove fields from view on timesheet

Discard changes and return to previous screen

[Printable Version]

Save Timesheet, Calculate Totals & ETC

Save and submit timesheet for approval

Automatically add to the timesheet assigned tasks that fall within the timesheet window

Open printable version of timesheet in a new window

Work Effort = Hours