

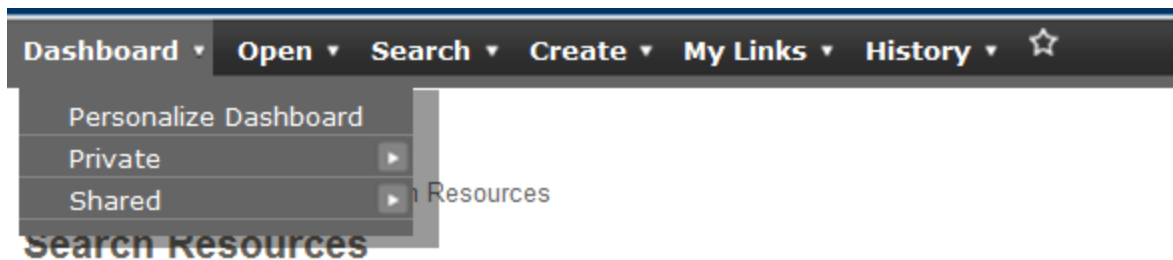
HP PPM – Time Approvers and Resource Pool Managers

Typically Time Approvers and Resource Pool Managers are the same person (supervisor). There are typically two portlets that can be added by this person to his Personalized Dashboard that will help them manage these tasks.

Time Approving Portlet

Analyze Assignment Load Portlet

To create or edit your personal page: Dashboard => Personalize Dashboard



Select the “New Page” option

Dashboard - Front Page > Search Resources > Personalize Dashboard



When the Note below appears you can check/uncheck the box and close

Edit page

Note: All changes to the page are automatically saved

Header

*Page Name:

Automatically refresh this page every minutes

Portlet

Note:

All changes to the page are automatically saved

Don't show this message again Close

You can now name the page and add a portlet

Note: All changes to the page are automatically saved Preview

Header

*Page Name:

Automatically refresh this page every minutes

Portlets

Select “Add Portlets”

Let’s start with Time Approver

Select “Time Management” from the “Category List”, then select “Find Portlets”

Automatically refresh this page every minutes

Add Portlets - Windows Internet Explorer

hp Close Window X

Add Portlets

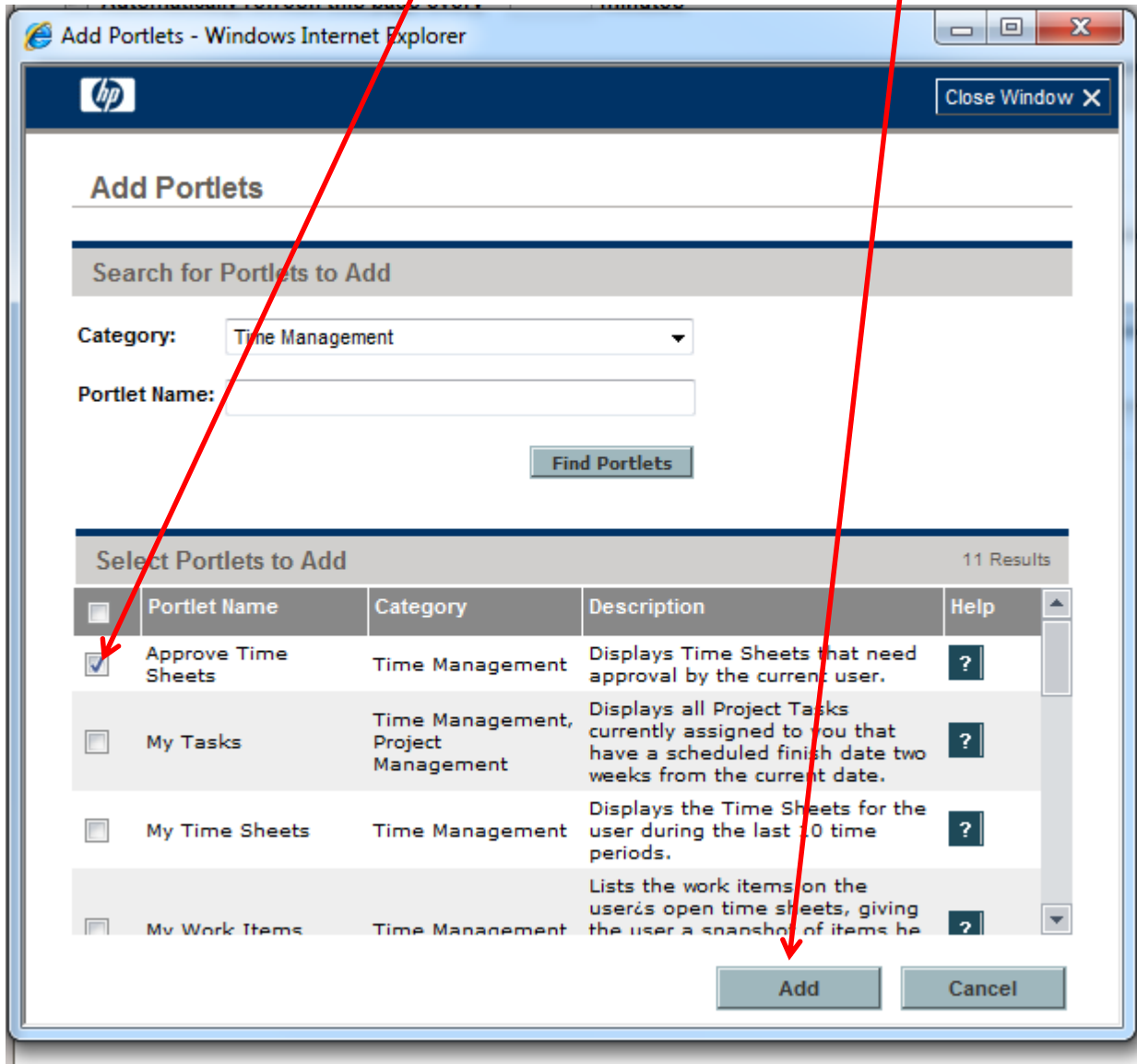
Search for Portlets to Add

Category:

Portlet Name:

Close Window X

Select “Approve Time Sheets” from the list and then select “Add”



Select Done

You can now change the width of the portlet or set the filtering criteria for the portlet.

Edit page

Note: All changes to the page are automatically saved Preview

Header

*Page Name:

Automatically refresh this page every minutes

Portlets

[Add Portlets](#)

Analyze Assignment Load [icon] [icon] [icon]

Filtering Criteria

Edit Preferences: Approve Time Sheets (Approve Time Sheets)

Preferences:

* Previous Time Periods to Show:

Resource:

Manager:

Org Unit:

Time Sheet Line Status:

Show Time Sheets:

Total Hours Equal or Exceed:

Total Hours Equal or Less Than:

Projects:

Display preferences summary on portlet:

* Sort By: Ascending Descending

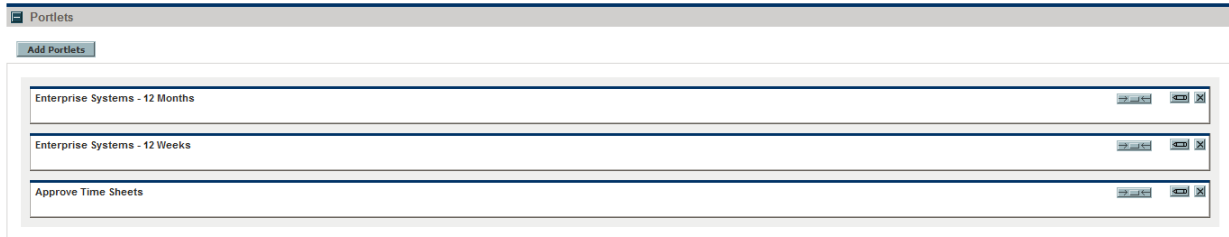
* Rows Displayed:

* Rows Displayed in Maximized View:

Select Done

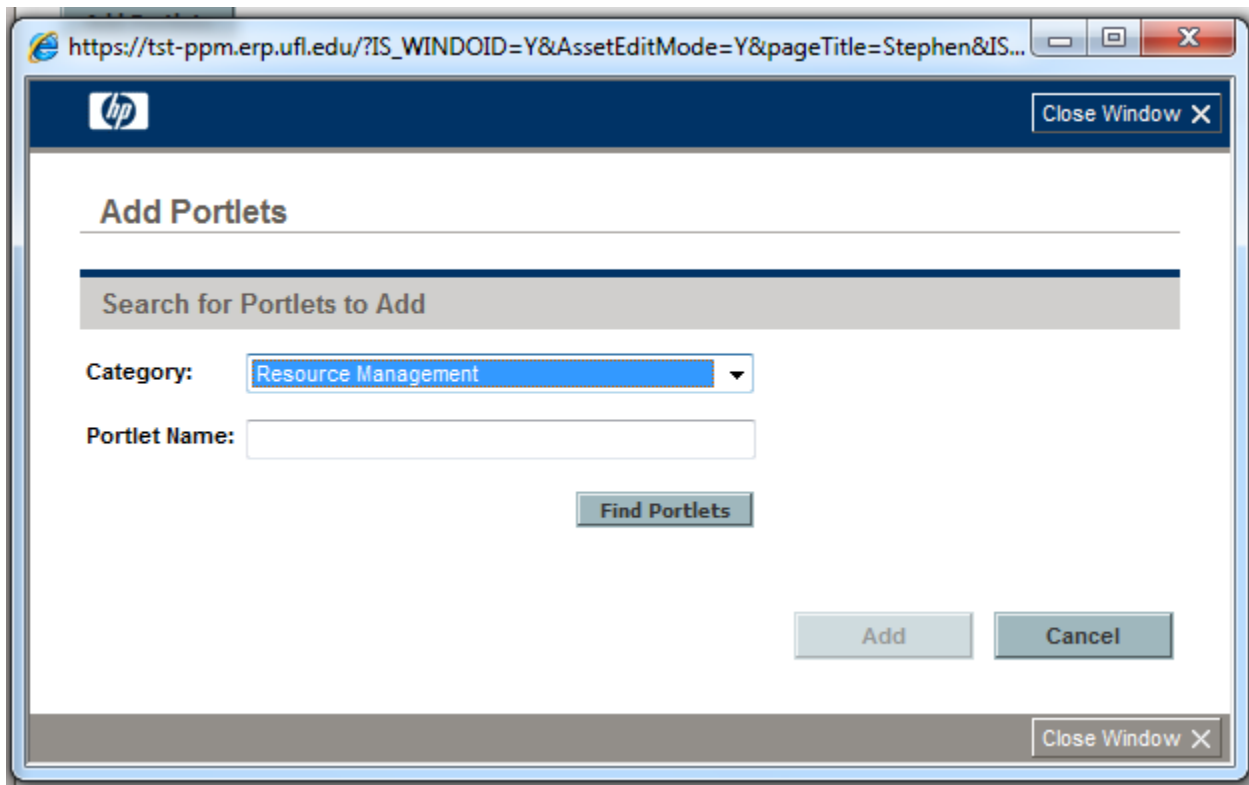
We are now going to add another portlet to this page

Resource Pool Manager – Analyze Assignment Load



Select “Add Portlet”

Choose “Resource Management” from the Category list



Select “Find Portlets”, scroll down to “Analyze Assignment Load”, check the box, and select “Add”.

The screenshot shows a web browser window with the URL `https://tst-ppm.erp.ufl.edu/?IS_WINDOWID=Y&AssetEditMode=Y&pageTitle=Stephen&...`. The page title is "Add Portlets". Below the title is a search section with a "Search for Portlets to Add" header. The "Category" dropdown is set to "Resource Management". The "Portlet Name" field is empty. A "Find Portlets" button is located below the search fields. Below this is a table titled "Select Portlets to Add" with 5 Results. The table has columns for "Portlet Name", "Category", "Description", and "Help". The first row, "Analyze Assignment Load", has its checkbox checked. At the bottom of the table are "Add" and "Cancel" buttons. Three arrows are overlaid on the image: a red arrow points from the text "Find Portlets" to the "Find Portlets" button; a green arrow points from the text "Analyze Assignment Load" to the checked checkbox; and a blue arrow points from the text "Add" to the "Add" button.

<input type="checkbox"/>	Portlet Name	Category	Description	Help
<input checked="" type="checkbox"/>	Analyze Assignment Load	Resource Management	Analyze Assignment Load Portlet.	?
<input type="checkbox"/>	Analyze Resource Pools	Resource Management	Analyze Resource Pools Portlet	?
<input type="checkbox"/>	Resource Pool List	Resource Management	Resource Pool List Portlet	?
<input type="checkbox"/>	Resource Request Portlet	Resource Management	Resource Requests List Portlet	?
<input type="checkbox"/>	Staffing Profile List	Resource Management	Staffing Profile List Portlet	?

You can now change the width of the portlet or set the filtering criteria for the portlet.

The screenshot displays the 'Edit page' interface. At the top, it says 'Edit page' and 'Note: All changes to the page are automatically saved'. There is a 'Preview' button in the top right. Below this is the 'Header' section with a 'Page Name' field containing 'Stephen' and an 'Automatically refresh this page every' checkbox with a 'minutes' input field. The 'Portlets' section contains an 'Add Portlets' button and a portlet titled 'Analyze Assignment Load'. Two red arrows originate from the text above: one points to the right edge of the 'Analyze Assignment Load' portlet, and the other points to the bottom-right corner of the portlet's title bar, which contains icons for width, height, and close.

Filtering – select the filtering icon.


Choose the Preferences (criteria) you wish to filter on (typically Resource Pool)


Choose the Time Period and number of periods

Edit Preferences: Change and Release - 12 Months (Analyze Assignment Load)

Preferences

Analyze Capacity from:

Organization Units: 

Resource Pool: 

Include children resource pools.

Limit capacity against selected resource pools.

Resources Managed By:

Resource Name:

Resources on Project:

Resources with role:

Assignments with Workload Category:

Total Assignment Values for:

Scheduled Effort

Actual Effort

Scheduled and Actual Effort

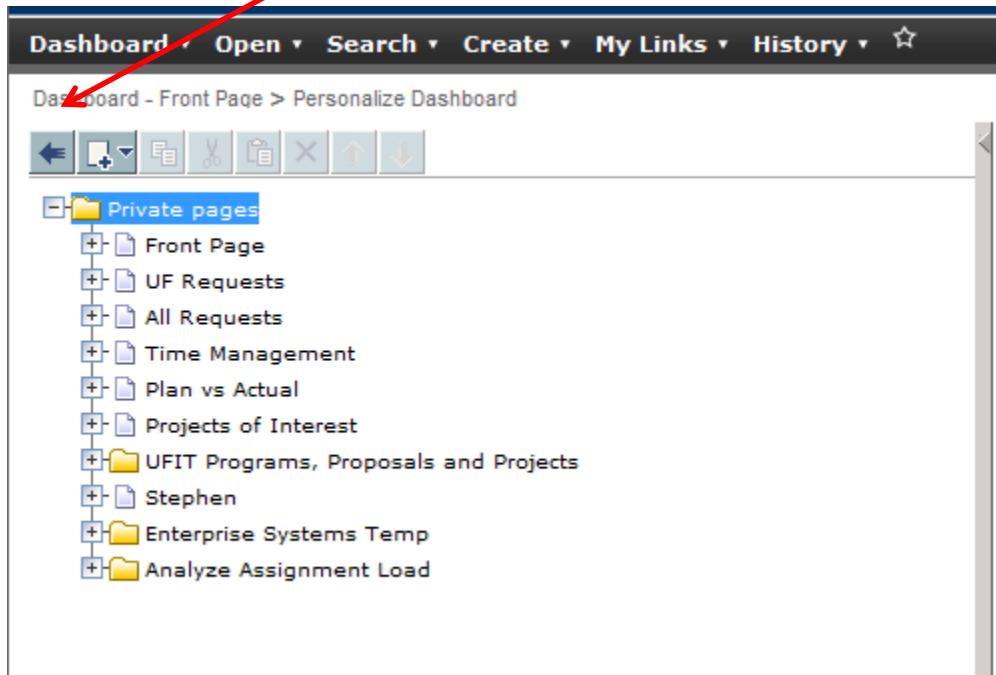
Time Period

Period:

Display: past periods

Display: future periods

Now you can click on the “Back” button or after opening any other page, you will find the page you just created under the “Private” selection in “Dashboard”.

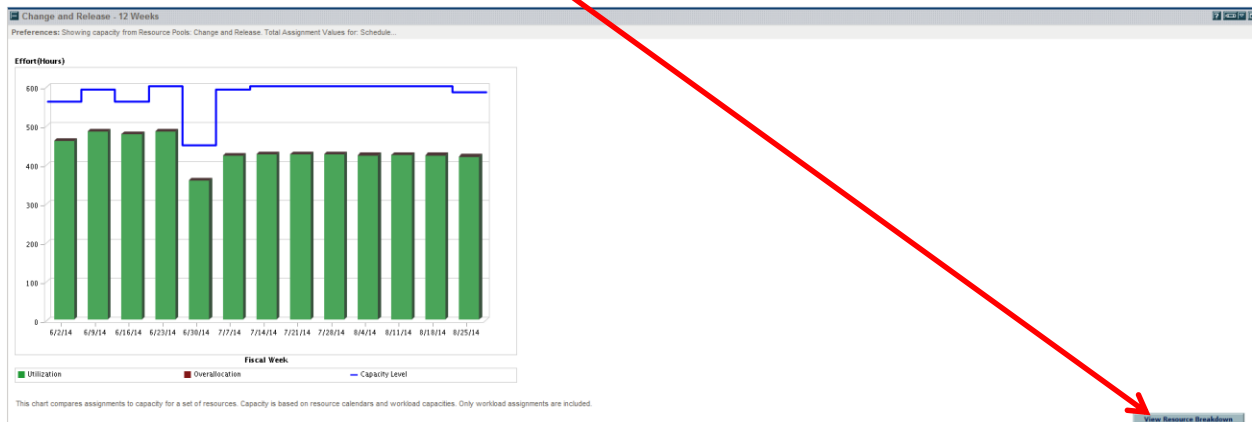


Your Resource Managers portlet should look similar to below.

The blue line represents capacity

The colored bars represent the load on the resources you defined in the criteria.

Select “View Resource Breakdown” to see more details



Select “Assignment Details” to get even more details

Values shown in red represent the load on a resource over 40hrs/week

Resource Load Breakdown - Assignment Summary

View: Assignment Summary | [Assignment Details](#) Legend: Over-Allocations

Showing workload breakdown for individual resources by Weeks from Jun 2, 2014 to Aug 31, 2014

Resource Name	6/2/14	6/9/14	6/16/14	6/23/14	6/30/14	7/7/14	7/14/14
	Sched	Sched	Sched	Sched	Sched	Sched	Sched
Pamela Bengtson							
Total Capacity	40	40	40	40	32	40	40
Total Assignments	40	40	40	40	31.09	35.91	35.91
Available Capacity	0	0	0	0	0.91	4.09	4.09
Robert Bull							
Total Capacity	40	40	40	40	32	40	40
Total Assignments	39.38	39.38	39.38	39.38	43.84	52.27	52.27
Available Capacity	0.62	0.62	0.62	0.62	(11.84)	(12.27)	(12.27)
Pate Cantrell							
Total Capacity	0	32	40	40	32	40	40
Total Assignments	0	23.5	23.5	23.5	15.14	9.23	9.23
Available Capacity	0	8.5	16.5	16.5	16.86	30.77	30.77
Stephen Cates							
Total Capacity	40	40	40	40	0	32	40
Total Assignments	37.48	37.48	37.48	37.48	0	26.3	26.3

[Export Resource Load Details](#)

Capacity Level

Similarly you can add additional selections by adding more portlets on your page or create more pages by using the “Personalize Dashboard” selection

