

How to Edit Items in PPM Time Sheets

Prerequisite: Before you follow this instruction, make sure you have already followed and completed “How to Categorize Your Time” and “How to Create a Time Sheet in PPM” steps.

The **My Items** list contains items that you create and maintain for your convenience on the **My Items** tab.

Add Items to Time Sheet

My Items Suggested Items

Items will remain in this list until you remove them. Add to 'My Items' ▾

Item	Description
<input type="checkbox"/> Task: Project Management	Enterprise Systems Managed Work FY2021 (#92492) > IT Professional Services > Portfolio and Project Management > Project Management > Project Management
<input type="checkbox"/> Task: Admin	Enterprise Systems Overhead FY2021 (#92523) > Admin
<input type="checkbox"/> Task: Leave	Enterprise Systems Overhead FY2021 (#92523) > Leave
<input type="checkbox"/> Task: Professional Development	Enterprise Systems Overhead FY2021 (#92523) > Professional Development
<input type="checkbox"/> Task: Project Management	Enterprise Systems Run FY2021 (#92524) > IT Professional Services > Portfolio and Project Management > Project Management > Project Management

Check all Remove Item(s)

Checked items will be added to your time sheet - 0 items will be added. Add Cancel

At the start of each fiscal year (July 1), all PPM users who submit time sheets must switch their **Discovery and Innovation, Managed Work, Overhead, and Run** tasks to the new fiscal year. This involves removing the previous fiscal year tasks from the **My Items** or **Suggested Items** list (as shown above) and replacing them with the new fiscal year tasks. You will first add tasks from **My Items** list to a new time sheet. Here's how.

1. Log into PPM at <https://ppm.erp.ufl.edu/> with your GatorLink username and password. If you experience any login issues, please contact PPMSupport@ad.ufl.edu.

2. Once you login successfully, open or create a time sheet by selecting **Add Items > Add from My Items/Suggested Items**.

The screenshot shows the PPM dashboard with a time sheet for Sha Liu. The time period is 2/22/21 to 2/28/21, and the status is Unsubmitted. The 'Add Items' dropdown menu is open, showing options like 'Approvals/Transaction Details' and 'Add from My Items / Suggested Items', which is highlighted with a red box. There is also an 'Add Task' button highlighted in red.

3. Click **Add to 'My Items' > Add Task** to add tasks to My Items list.

The screenshot shows the 'Add Items to Time Sheet' dialog box. It has two tabs: 'My Items' and 'Suggested Items'. The 'Add to My Items' dropdown menu is open, showing the 'Add Task' option, which is highlighted with a red box. The text 'Items will remain in this list until you remove them.' is visible, along with a search field for 'Item Name or Description contains:' and a message 'No Items found.'

4. We can start to add Overhead tasks as an example. Enter **"overhead"** in the Project (Name or Number) field, then use the **TAB** key on your keyboard or use your mouse to click on the project selector icon to the right of the field. This will search/select the project.

The screenshot shows the 'Add Tasks to My Items' dialog box. It has two sections: 'Task Filters' and 'General Filters'. In the 'Task Filters' section, the '*Project (Name or Number):' field contains the text 'overhead' and is highlighted with a red box. There is a project selector icon to the right of this field. Other fields include 'Task Name Contains', 'Task Type', 'Task Status', 'Scheduled Start From', 'Scheduled Start To', 'Scheduled Finish From', and 'Scheduled Finish To'. The 'General Filters' section includes 'Modified in Last x Days', 'Created in Last x Days', and 'Include Closed?' with radio buttons for 'Yes' and 'No'. There are 'Search' and 'Cancel' buttons at the bottom right.

- Each unit has their own Enterprise Projects so select the Project of **Your Org Unit (Research Computing, ICT, etc.)**. Notice the Enterprise Project names in this example end with FY2021.

Click a value to select
✕

Project (Name or Number) contains:

Project Manager (Full Name) contains:

Include Complete and Cancelled Projects? Yes No

Project ▼	Project Name	Manager Name
92535	Research Computing Overhead FY2021	Emily Pfeffer, Sha Liu
92531	Information Security Overhead FY2021	Emily Pfeffer, Sha Liu
92527	ICT Overhead FY2021	Emily Pfeffer, Sha Liu
92523	Enterprise Systems Overhead FY2021	Emily Pfeffer, Sha Liu
92489	CIO Overhead FY2021	Emily Pfeffer, Sha Liu
92487	Business Center Overhead FY2021	Emily Pfeffer, Sha Liu
92484	Academic Technology Overhead FY2021	Emily Pfeffer, Sha Liu

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- Click **Search**

Add Tasks to 'My Items'
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Task Filters

Task Name Contains:

Task Type:

Task Status:

Scheduled Start From:

Scheduled Finish From:

*Project (Name or Number):

Project Assigned Resource:

Scheduled Start To:

Scheduled Finish To:

General Filters

Modified in Last x Days:

Created in Last x Days:

Include Closed? Yes No

- Select the **tasks** you need to document time spent, then click **Add**. (The screenshot is an example; you should choose your own unit Overhead Projects)

Add Tasks to My Items

Select the tasks to add, and click the add button. Or click the Modify Search to run a different search. List | Hierarchical view

Select Tasks Showing 1 to 3 of 3

<input type="checkbox"/>	Task Name	Project Path	Project Name
<input checked="" type="checkbox"/>	Leave	Enterprise Systems Overhead FY2021 > Leave	Enterprise Systems Overhead FY2021
<input checked="" type="checkbox"/>	Professional Development	Enterprise Systems Overhead FY2021 > Professional Development	Enterprise Systems Overhead FY2021
<input checked="" type="checkbox"/>	Admin	Enterprise Systems Overhead FY2021 > Admin	Enterprise Systems Overhead FY2021
<input checked="" type="checkbox"/>	Check all		

Showing 1 to 3 of 3

- You will then have your items in My Items list. You could edit your items list by clicking **Remove** or **Add**.

Add Items to Time Sheet

Items will remain in this list until you remove them.

Item Name or Description contains:

<input type="checkbox"/>	Item	Description
<input checked="" type="checkbox"/>	Task: Project Management	Enterprise Systems Managed Work FY2021 (#92492) > IT Professional Services > Portfolio and Project Management > Project Management > Project Management
<input checked="" type="checkbox"/>	Task: Admin	Enterprise Systems Overhead FY2021 (#92523) > Admin
<input checked="" type="checkbox"/>	Task: Leave	Enterprise Systems Overhead FY2021 (#92523) > Leave
<input checked="" type="checkbox"/>	Task: Professional Development	Enterprise Systems Overhead FY2021 (#92523) > Professional Development
<input checked="" type="checkbox"/>	Task: Project Management	Enterprise Systems Run FY2021 (#92524) > IT Professional Services > Portfolio and Project Management > Project Management > Project Management

Check all

Checked items will be added to your time sheet - 5 items will be added.

9. **Check** the items that you will record your time > click Add.

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Add Items to Time Sheet

My Items
Suggested Items

Items will remain in this list until you remove them. Add to 'My Items' ▾

Item Name or Description contains:

	Item	Description
<input checked="" type="checkbox"/>	Task: Project Management	Enterprise Systems Managed Work FY2021 (#92492) > IT Professional Services > Portfolio and Project Management > Project Management > Project Management
<input checked="" type="checkbox"/>	Task: Admin	Enterprise Systems Overhead FY2021 (#92523) > Admin
<input checked="" type="checkbox"/>	Task: Leave	Enterprise Systems Overhead FY2021 (#92523) > Leave
<input checked="" type="checkbox"/>	Task: Professional Development	Enterprise Systems Overhead FY2021 (#92523) > Professional Development
<input checked="" type="checkbox"/>	Task: Project Management	Enterprise Systems Run FY2021 (#92524) > IT Professional Services > Portfolio and Project Management > Project Management > Project Management

Check all
 Remove Item(s)

Checked items will be added to your time sheet - 5 items will be added.
Add
Cancel

You will see your items listed in your Time Sheet.

PPM
DASHBOARD ▾
OPEN ▾
SEARCH ▾
CREATE ▾
MY LINKS ▾
HISTORY ▾
🔍

Dashboard - Your Name > Create Time Sheet > Dashboard - Your Name > Edit Time Sheet

Sha Liu - Time Sheet for 2/22/21 - 2/28/21 (Unsubmitted)

Resource: Sha Liu
Time Period: 2/22/21 to 2/28/21
Time Sheet #: 1

*Description: Sha Liu - 2/22/21 - 2/28/21
Status: Unsubmitted

Add Items ▾
Approvals/Transaction Details
Time Sheet Policies ⚠

Time Sheet Details (All times shown in hours) Group | Ungroup Items

Tab key goes to next: Item | Day

Item	Expected Hours	Mon 2/22	Tue 2/23	Wed 2/24	Thu 2/25	Fri 2/26	Sat 2/27	Sun 2/28	Total
<input type="checkbox"/> Enterprise Systems Overhead FY2021 Project: 92523									
<input type="checkbox"/> ⚠ Task: Admin <small>(Enterprise Systems Overhead FY2021)</small>	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> ⚠ Task: Leave <small>(Enterprise Systems Overhead FY2021)</small>	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> ⚠ Task: Professional Development <small>(Enterprise Systems Overhead FY2021)</small>	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Line Actions:		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

For the next step please follow “How to Submit Your PPM Time Sheets” instruction. If you have any questions, please contact PPMSupport@ad.ufl.edu.