



# Offline Timesheet Manager for Planview

2007



- This tool enables resources without access to Planview to report time using only e-mail
- The work manager imports into Planview
- Not a full replacement for Planview's timesheets
- Intended for consultants, who are on the road or working at customer sites

# Specifications

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- Add-on application which connects with the Planview database
- Functionality to create, send, receive and review timesheets
- Export to uniquely identified Excel files
- Import Excel files into Planview using PVLoader
- Automatic handling of timesheets using a standard e-mail system

# Specifications

(continued)

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- The resource manager can enable off-line timesheets using a flag in the resource attributes
- Planned work, unplanned work, standard activities and assigned tickets are supported
- E-mails are sent to the resources with an attached Timesheet spreadsheet
- Replied e-mails with a completed Timesheet spreadsheet attachment are collected and imported into Planview

# Intuitive GUI

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**PlanView Offline Timesheet Manager**

File Timesheets Help

February 2007

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
5	28	29	30	31	1	2	3
6	4	5	6	7	8	9	10
7	11	12	13	14	15	16	17
8	18	19	20	21	22	23	24
9	25	26	27	28			
10	4	5	6	7			

3/23/2007

- Selected PlanView period
- Period with open timesheets

Bill Smith v1

Bob Adams v2

Liz Carter v2

Nancy Cage

Ric Cortez v1

Tom Matthews

- Managed by PlanView
- Exported
- Sent
- Received

23-Mar-2007 16:38 PVTSMGR v0.7

23-Mar-2007 16:38 Deleting local store timesheet 827 Bob Adams.xls

23-Mar-2007 16:38 Timesheet export started of period 827

23-Mar-2007 16:38 Timesheet exported for Bob Adams version 2

23-Mar-2007 16:38 Timesheet export complete in 0m 9s

23-Mar-2007 16:38 Timesheet send started of period 829

23-Mar-2007 16:38 Liz Carter's timesheet has been sent to lcarter@consultec.cc

23-Mar-2007 16:38 Timesheet send complete in 0m 2s

23-Mar-2007 16:39 Deleting local store timesheet 829 Bob Adams.xls

23-Mar-2007 16:39 Timesheet of Bob Adams of Period 829 closed

23-Mar-2007 16:39 Timesheet import started of all files

23-Mar-2007 16:39 827 Bill Smith.xls skipped: no work in this file reported

**Timesheet import**

0 items of 8 processed 1 processed, 0 skipped

Abort

Administer Bob Adams

- Export Bob Adams' timesheet for selected period into local store
- Import <name> timesheet in local store into PlanView
- Send Bob Adams' of selected period local store to badams@consultec.cc
- Close Bob Adams' timesheet in selected period from local store



- Does check if this the current version of the timesheet is being imported
- Verify whether the resource exists
- Verify whether the time between the actual start date and the actual finish is one week
- Verify if task is at lowest level
- Verify if task is not ticketable
- Verify if allocation exists

# TS message

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The screenshot shows the Thunderbird email client interface. The window title is "Inbox for lcarter@consultec.cc - Thunderbird". The menu bar includes File, Edit, View, Go, Message, Tools, and Help. The toolbar contains icons for Get Mail, Write, Address Book, Reply, Reply All, Forward, Delete, Junk, Print, and Stop. The Folders pane on the left shows a tree view with folders for Liz Carter, Bill Smith, Miles Davis, Ric Cortez, Nancy Cage, and Tom Matthews. The main pane displays an email message with the following details:

**Subject:** PlanView Timesheet from 4-Feb-2007 to 11-Feb-2007  
**From:** PlanView Timesheeting <timesheeting@consultec.cc>  
**Date:** 14:37  
**To:** Liz Carter <lcarter@consultec.cc>

Hello Liz Carter,

In attachment you'll find a timesheet you have to fill in and return. This timesheet is for the period from 4-Feb-2007 to 11-Feb-2007

Please send in reply the filled in copy before 17-Mar-2007 to [timesheeting@consultec.cc](mailto:timesheeting@consultec.cc)

Greetings,  
Your PlanView administrator

**Attachments:** 827 Liz Carter.xls

Unread: 0 Total: 1



- The consultant receives e-mail with new timesheet, it can be completed it off-line and returned when connection to e-mail is available
- No double work necessary; consultant can complete the timesheet when needed, instead of filling it first in on paper



# Work list

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The screenshot shows a Microsoft Excel window titled "Microsoft Excel - 828 Liz Carter.xls". The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Window, and Help. The toolbar contains various icons for file operations and editing. The spreadsheet has columns labeled "Allocated work" and "Authorized" in row 2, and "Finish", "Remainder", and "Sum" in row 3. A dialog box titled "Add standard activity to your timesheet" is open, displaying a list of activities: Budget Preparation, Business Planning Activities, External Training, General - Project Administrative Work, General - Project Status Meetings, General Administrative Work, General Infrastructure Support/Maintenance Work, General Management Activities, General System Support/Maintenance Work, and General User Support. The dialog box has "Ok" and "Close" buttons at the bottom.

Microsoft Excel - 828 Liz Carter.xls

File Edit View Insert Format Tools Data Window Help

Type a question for help

Liz Carter

Add standard activity to your timesheet

Select below an authorized work that you want to add to your timesheet

- Budget Preparation
- Business Planning Activities
- External Training
- General - Project Administrative Work
- General - Project Status Meetings
- General Administrative Work
- General Infrastructure Support/Maintenance Work
- General Management Activities
- General System Support/Maintenance Work
- General User Support
- Holidays

Ok Close

Timesheet

Ready

# Reported work

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Tasks are added using the buttons below

Liz Carter				Assignment			Sunday	Monday	Totals		
Allocated work	Authorized work	Standard activity	Ticket	Type	Start	Finish	Remainder	4-Feb-07	5-Feb-07	Estimate to complete	Already progressed
Phase: Development				Allocated	04-Dec-06	12-Jan-07	50			26	24
Activity: Hardware Upgrades				Authorized	11-Oct-05					3	
Holidays				Standard						8	
Great Plains Backup Failed				Application Portfolio						0	
Add additional fields to billing screen				Corporate						0	
				Customer Facing Applications							

Work description with start and finish date



- Excel 2003
- POP/SMTP mail server
- Planview with PVLoader extensions installed
- Database account for read access