Time and Task Management

Today more than ever, organizations need accurate, up-to-date information to make informed business decisions. Many organizations use time reporting systems to capture work and nonworking time for payroll, invoicing, and other business purposes. Similarly, project managers need to efficiently capture and communicate status on project work to help gauge progress and to anticipate the effect on planned effort, cost, and timeframes. Although the type and source of information is similar, divergent uses and requirements make it difficult for organizations to have a centralized and common approach to time reporting and task management.

Time capture and project progress reporting poses several challenges to organizations, and they need to have the following characteristics.

- **An easy-to-use interface.** Time entry systems tend to be widely used across organizations and need to be simple and intuitive for those who regularly enter and approve updates. Users expect a consistent and familiar interface that shows current and relevant time capture categories to support accurate reporting of time and project progress.
- **Single-source, to report working and nonworking time.** Organizations want streamlined processes that capture and update information used for operations, analysis, and control. Different business applications can be used for project management, financial reporting, or operational processes that collect time worked by individuals as the basis for reporting and projections.
- **Able to capture projects, operations, and administrative time**. Project-based organizations need to be able to capture progress and status on tasks at the same time that they are gathering non-project time, such as systems maintenance work and administrative time, including nonworking time for vacation, sick leave, or other paid time off (PTO).
- **Support high use in short, recurring time periods.** Unlike other business processes, time and task status reporting tends to involve a recurring cycle of large numbers of activities performed at periodic intervals. Time reporting systems need to scale to support high volumes of transactions at the end of the working week or the end of the month.
- **Offer flexible choices for how you and your organization work.** Time capture and project progress reporting activities reflect the approach and level of detail that enterprises need to support their business decision activities. Therefore, time reporting solutions need flexible approaches to support data collection, systems integration, business rules, exception handling, and information reporting requirements.
- **Integrate with line-of-business (LOB) systems.** Enterprises would prefer one system for capturing time and project task progress information that can then be integrated with other LOB applications, such as payroll, project cost accounting, and financial management systems.

Microsoft® Project Server 2010 provides organizations with the flexibility they need to centralize time capture, streamline processes, automate task management, and increase the accuracy of project forecasting. Organizations can select how they want to capture working and nonworking time needed for statutory time recording and progress updates to project managers. Time reporting capabilities have been further enhanced in Project Server 2010 to provide a new Single Entry Mode to unify time and task status updates. The Web-based user interface for timesheet entry and task management has been standardized to speed learning and enhance experience. Users can quickly see and find relevant tasks and easily complete common activities. Time entry can include nonworking time and billing categories to support payroll, invoicing, and project costing applications. Project Server 2010 also provides a single screen for managing approvals for timesheets, project updates, and administrative approvals. The information captured in the timesheet and task management process can be shared with LOB applications that use time and progress information for processing.

Intuitive User Interface for Time and Task Entry

The intuitive Timesheet and Tasks views in Project Server 2010 ensure that team members can effectively provide task status information and project, non-project, and nonworking time (see Figure 1). Project Server 2010 helps organizations standardize and simplify time reporting processes, thereby reducing training requirements. Team members are provided with an easy-to-use and responsive interface that can be customized for their specific preferences and needs.

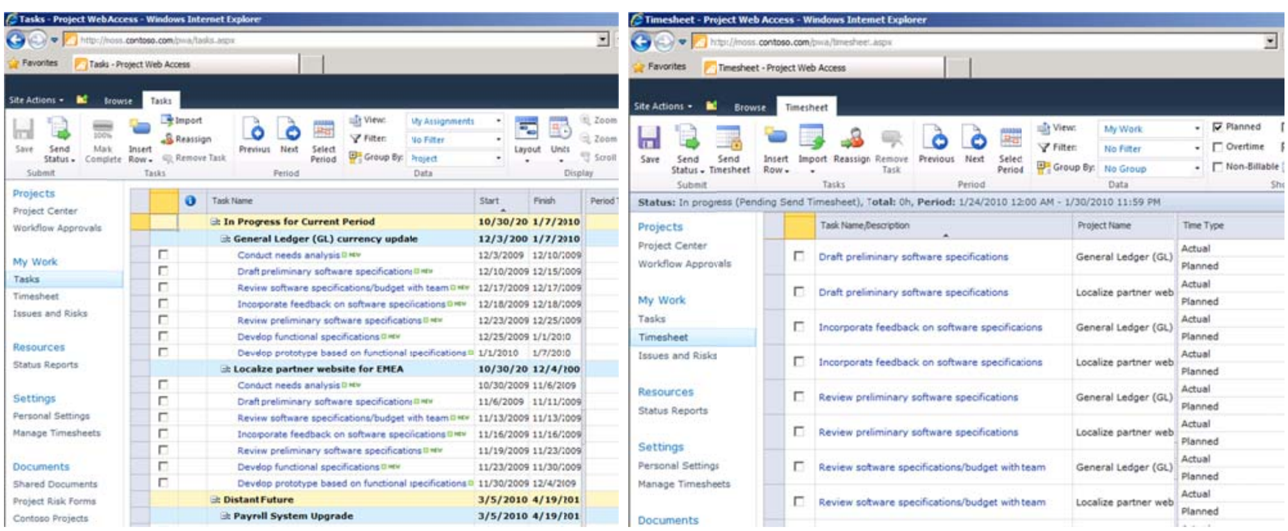

Figure 1. Project Server 2010 – Time entry and task updates user interface

An improved interface standardizes the experience between the Timesheet and Tasks views to ensure that users can quickly complete time and task update submissions. Using the new Ribbon interface, it is easy to complete common activities, such as identifying overdue and completed tasks, and to create custom filters and groups to find assignments.

Efficiently Receive Project Tasks

Effective project management requires having the latest status available to be able to accurately analyze project performance and make appropriate adjustments to the schedule. Organizations need flexible methods for users to submit time and provide project managers with real-time tasks updates.

Project Server 2010 offers various tools for managing and communicating resource assignments and for effectively gathering task updates from team member entries. Team members can receive and view their assignments through the Web-based Tasks view, through an e-mail notification, or as Microsoft Outlook® tasks grouped by project.

After consolidating their assignments in an effective view, team members can choose the update method and productivity tool they prefer to use. Project Server 2010 makes it easy to provide assignment updates, whether team members choose to use the Tasks view or to update tasks directly in Outlook. Project Server 2010 connects with Microsoft® Exchange Server to ensure that team members can receive their project tasks in Outlook or in Microsoft Outlook® Web App, without requiring an Outlook add-in (see Figure 2).

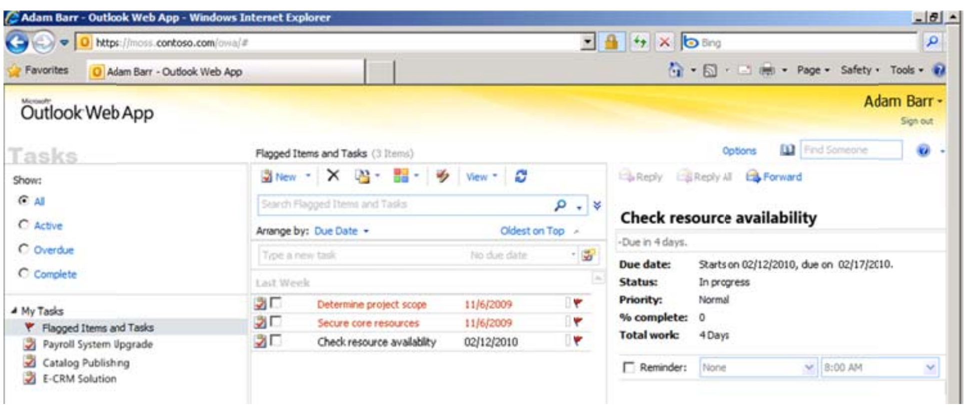

Figure 2. Project Server 2010 – Project tasks in Outlook Web App

The Tasks view displays project and non-project work assigned to individuals. In addition, users can view tasks assigned to other resources for which they provide updates, such as contractors, or team resource assignments for their projects (see Figure 3). Assignments in the Tasks view are organized by time period to help users focus on current information and prepare for upcoming activities. Sorting, filtering, and grouping options are available to help users find relevant tasks. Team members also have the option of reassigning tasks to others or to self-assign tasks made to their team assignment pool.

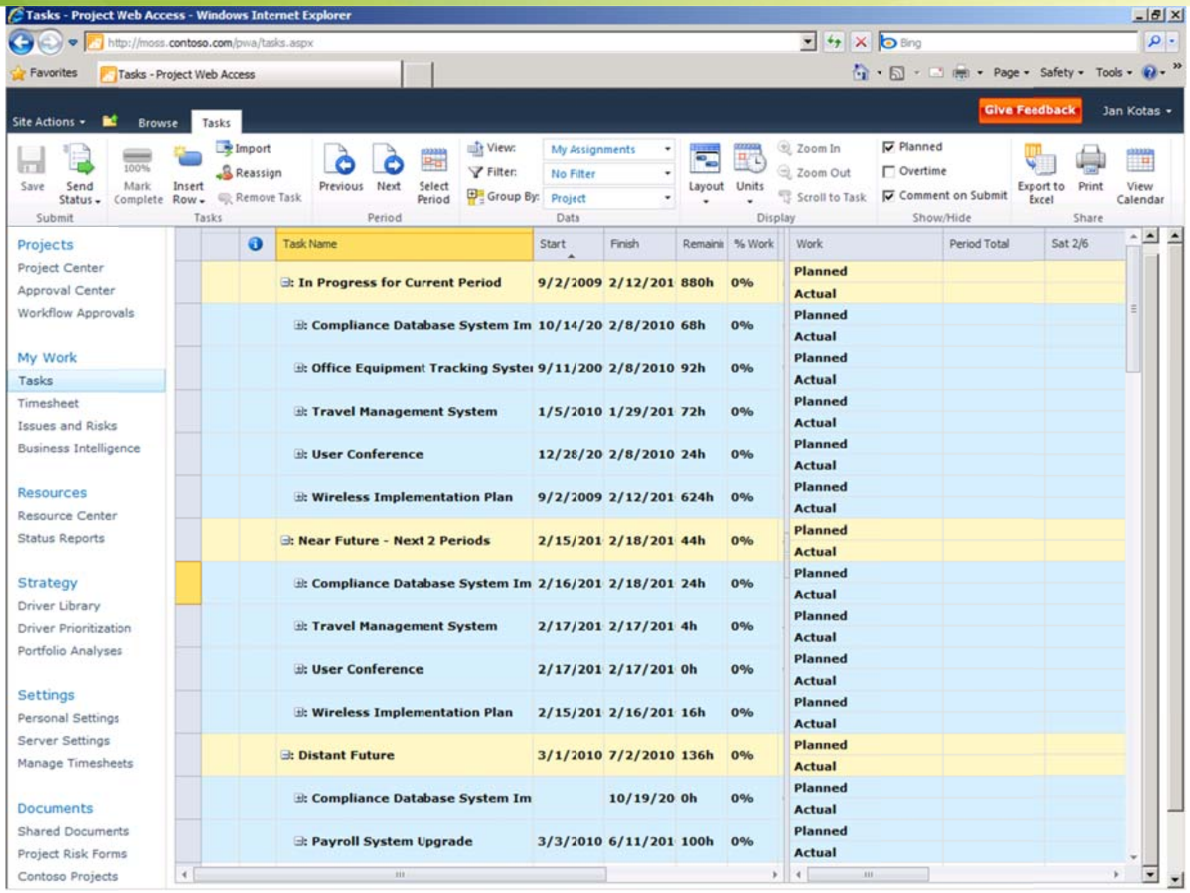

Figure 3. Project Server 2010 – Tasks view

Single Entry Mode Enhances Time and Task Reporting

Project Server 2010 offers a single solution for organizations that need to collect time spent on projects and to report on project progress. The new Single Entry Mode in Project Server 2010 simplifies time and task status reporting by providing a unified timesheet interface for capturing and updating time and information used for operations, analysis, and control.

Timesheets are a mechanism for reporting time in standard time periods—for example, a week—that can be categorized and summarized to use in other business processes, such as payroll or invoicing. The Project Server 2010 Timesheet view includes entry lines for assigned project tasks so that users can record work performed during the timesheet period. It also includes entry lines for administrative categories that can capture both work and non-work time. Single Entry Mode simplifies timesheet submittal and updates by consolidating task progress and time reporting data. Unification of time and task updates helps users complete the submission, reduce errors, and see results quicker.

The Project Server 2010 Timesheet view combines project and administrative time in a seamless view, and includes an adjustable vertical bar between line description information and the time entry area for flexibility and precision when entering data. Timesheets support a fixed calendar period, organized with project tasks listed at the top, and administrative items below so users can navigate to relevant time entry lines. Organizations can establish predefined administrative working and nonworking time categories for meetings, vacation, sick leave, holidays, and other administrative categories (see Figure 4).

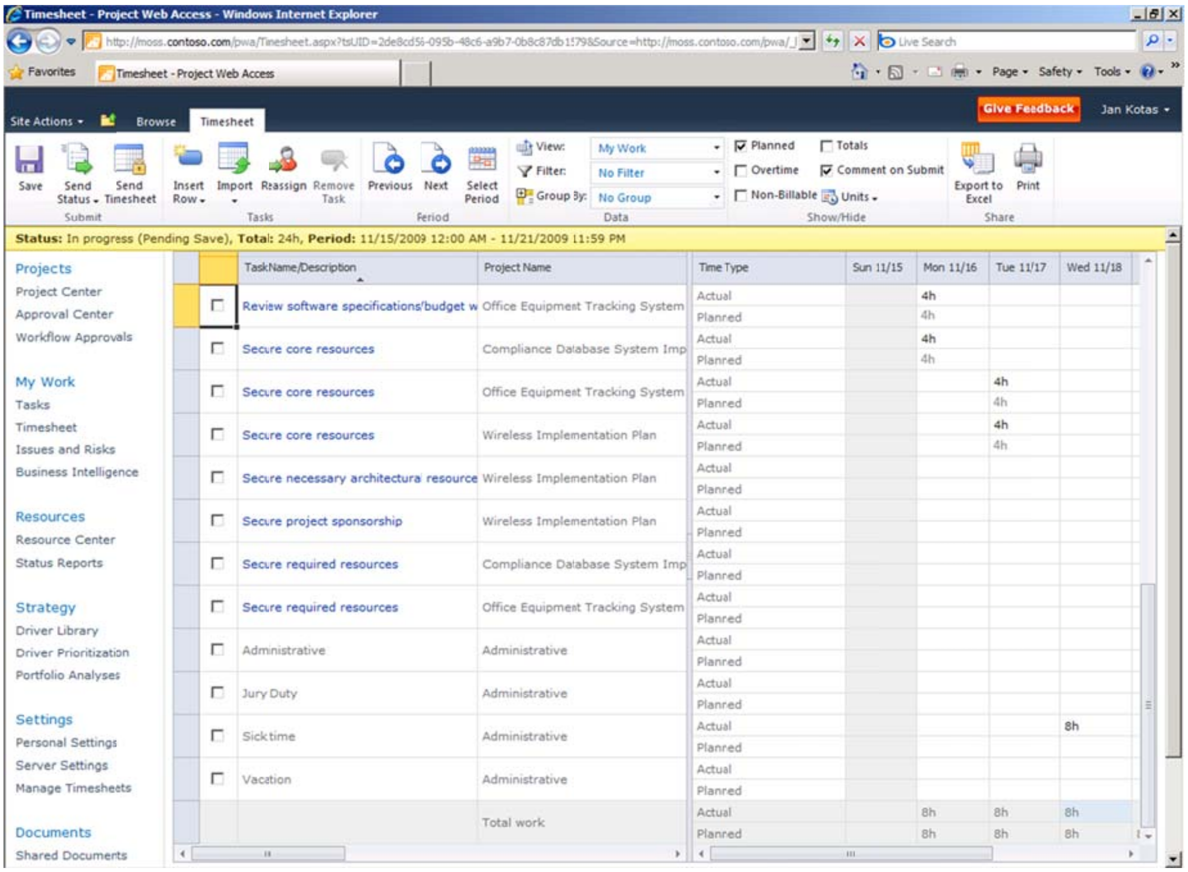

Figure 4. Project Server 2010 – Timesheet view

In Project Server 2010 timesheet data can be categorized for integration with financial systems for payroll, invoicing, project costing, and chargebacks. This includes support for billable versus non-billable time, in addition to regular and overtime time entry. Timesheets include a variety of administrative controls to enforce time reporting standards. Project Server 2010 addresses additional complex scenarios such as support for users to submit status updates to project managers in the middle of a timesheet period without submitting an entire timesheet for approval.

Flexible Time and Task Approvals

Many organizations have different control and oversight requirements for timesheets and task status updates. Project Server 2010 approval workflows are configurable, to help project management offices (PMOs) select the level of review and control that is right for their organization.

Project Server 2010 provides a dedicated Approval Center to simplify the review of timesheet, task updates, and administrative time request approvals (see Figure 5). The Approval Center inherits the same intuitive interface as the Timesheet and Tasks views, with options to group, sort, and filter tasks to help users personalize and streamline their approval activities.

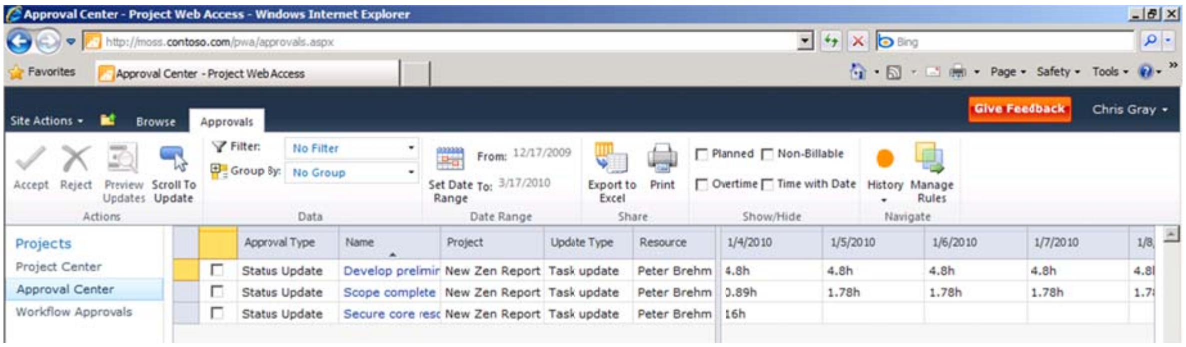

Figure 5. Project Server 2010 – Approval Center view

Project Server 2010 gives managers and project management offices (PMOs) the choice of requiring approval for timesheet submittals, specifying individual approvers, letting users select the approver, or using automatic approval routing so that timesheets go through a multi-level workflow based on organizational hierarchy. In Project Server 2010 administrative time like vacation requests can be preapproved by a timesheet manager, using per-line timesheet approvals. In addition, Project Server 2010 can delay sending timesheets for approval until all tasks on the timesheet have been approved by the designated project or task status manager.

Task updates can be routed directly to the project manager or to a designated task status manager. Business managers or PMOs can create automatic approval rules for tasks, which will help reduce administrative burden so that project managers can focus on other important activities. Using the Web-based Approval Preview feature, managers can maintain control by visually assessing the effect of changes on the schedule before accepting task updates (see Figure 6).

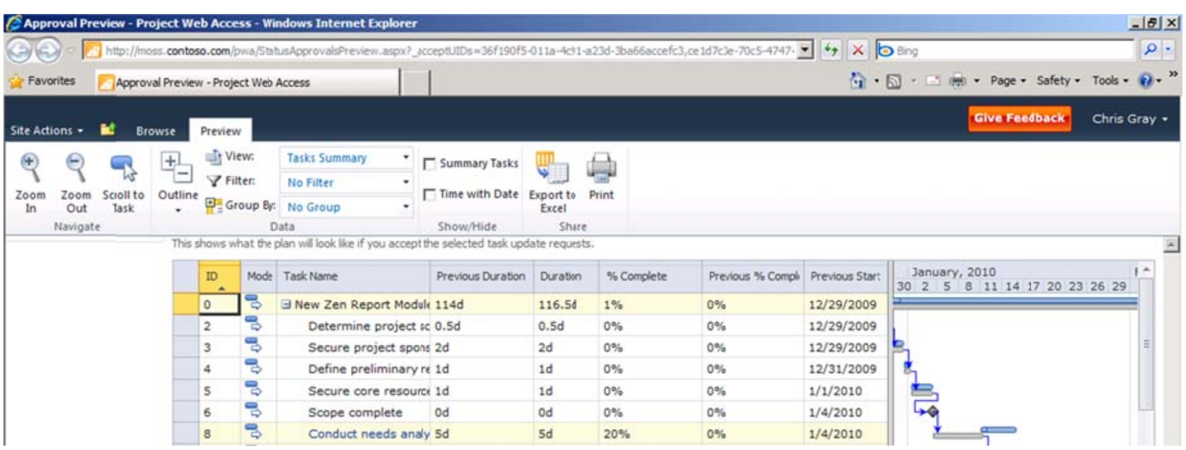

Figure 6. Project Server 2010 – Approval Preview view

Optimized Performance, Administration, and LOB Integration

Time reporting systems need to support high volumes of transactions because most team members complete their timesheets at the same time—at the end of the work week. As in many other areas, in this way Project Server 2010 scales to support the needs of the enterprise. Timesheets are queued separately from other enterprise project management (EPM) business processes to support high-volume transaction periods and to minimize impact on system performance.

Project Server 2010 time and task management capabilities are highly configurable to meet the needs of the organization. By configuring server settings, administrators can intuitively manage the timesheet process by defining the appropriate fiscal accounting periods, creating timesheet periods, adding timesheet line classifications, configuring administrative time categories, and more. PMOs can easily open and close timesheet periods to facilitate lock-down periods and control time entry in open date ranges. Using Project Server 2010, users can act as delegates on behalf of other users. This is extremely helpful for timesheet and task updates for users with periodic or extended absences or when substitutes are needed for timesheet or task approval processes.

The Project Server 2010 reporting database has been expanded to include comprehensive details about timesheet data. This information can be used to show the status of timesheet submittals and approvals at a specific point in time, or as overall trends to support management compliance and performance reporting.

Additionally, timesheet and task data can be summarized to use with or be integrated into other LOB systems. Organizations can easily integrate with other applications by accessing timesheet data through Web services or through direct access to the timesheet schema. This ensures that Project Server 2010 will be your hub for collecting and disseminating information with other LOB applications, such as payroll, project cost accounting, and financial management systems.

Additional Resources

For expanded help, step-by-step guides, and video training on how to get the most of Project Server 2010 and the Microsoft EPM Solution, visit Microsoft Project.

To learn more about Project 2010 and the Microsoft EPM Solution, refer to the following list of related links:

Product information

MSDN Project 2010 Beta

Project 2010 Blog

Project Team Blog

Interactive content - Videos & Sessions & Webcast

Project 2010 Video Showcase

Enterprise Project Management Microsoft Events

Project Developer Center

Microsoft Office Project TechNet

Project Professional 2010 and Project Server 2010 Demo Image:

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Additional questions? Project 2010 Forums!

Project 2010