

TESTING UNASSIGNED TASKS IN V13.3

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INTRODUCTION

The purpose of this document is to record the results of a single test of not allowing a resource to add unassigned tasks to his timesheet in CA Clarity v13.3

SETTINGS

The screenshot shows the 'Settings' page in CA Clarity PPM. The 'Staffing' tab is selected. The 'General' section includes: Default Load Pattern (Front), Guidelines URL, First Month of Financial Quarter (Jan), First Day of Work Week (Mon), Default Display Unit for Work Effort (Hours), Enable Investment-specific Charge Codes (unchecked), Allow posting of future timesheets (checked), Notify on Delete of Risk/Issue/Change Requests (unchecked), and Only Export Current Baselines When Opening Investments in a Scheduler (unchecked). The 'Staffing' section includes: Round Allocations to Nearest % (25), Allow Effort Task Creation (checked), Reassign Tasks when replacing Role (checked), Allow Edit of Allocations when Investment is Locked (unchecked), Automatically Open Staff Members for Time Entry (Never), Show Tasks in Organizer (When Assigned), Automatically Add Staff Members As Investment Participant (When Added to Investment), Allow Override Requisition Approval (unchecked), Allow Mixed Booking (checked), Convert resources to roles when using templates (default) (unchecked), and Requisition Booking (Use Allocation Percentage).

No Global option to allow adding of unassigned tasks.

Timesheet Options

Default Content and Layout

Available Columns		Selected Columns
Task ID	→	Notes Icon
Short Name		Investment
Investment ID		Description
Parent		Input Type Code
Parent ID	→	Charge Code
Phase		Daily Actuals
Phase ID	←	Total

Required Options: Description.

Apply

Default Sorting Column

Sorting Order Ascending

Descending

Default Time Entry Options

Disable Indirect Time Entries

Populate Time Range days before time period start (default = 7)

days after time period end (default = 7)

User Value 1 Lookup

Auto-Populate Off

Copy time entries from previous timesheet

Copy time entries from previous timesheet and include actuals (actuals not copied for incidents)

Display Unit

Decimal Places

Enable Note Date

Apply to All Resources

Restore Defaults

Save

No timesheet option for allowing to add unassigned tasks to timesheets.

Projects

Filter: System Default

<input type="checkbox"/>	Project▲	Prevent Unassigned Timesheet Tasks				
<input type="checkbox"/>	Mstone					mstone
<input type="checkbox"/>	Project1	<input checked="" type="checkbox"/>				Project1
<input type="checkbox"/>	Test_juan					Test_juan
<input type="checkbox"/>	View_test					View_test
<input type="checkbox"/>	zprogram					zprogram
<input type="checkbox"/>	zproject					zproject
<input type="checkbox"/>	ztrough					ztrough
<input type="checkbox"/>	zWBSlevel					zWBSlevel

Save New New from Template Mark for Deletion Cancel Deletion

Prevent Unassigned Timesheet Tasks True

Object: Project | Attribute: Prevent Unassigned Timesheet Tasks - Object Attribute

General

Attribute Name Prevent Unassigned Timesheet Tasks

Attribute ID track_assgn_only

Description Prevents Users From Adding to their Timesheet the Project Tasks to which they are not Assigned

Data Type Boolean

Default Value
(Default value is false if not checked and true if checked.)

Presence Required

Read-Only

Display Mappings

Type: Icon

Icon	Description
<input type="text" value=""/>	Default Bucket
Yellow Checkmark	Prevent Unassigned Timesheet Task

Save Save And Return Return

* = Required + = Enter Once * = Unique

Details of the Prevent Unassigned Timesheet Tasks

Resource: Ted Ueberoth - Groups

<input type="checkbox"/>	Group▲	Description	Status
<input type="checkbox"/>	Timesheets - Access	Allows user to access the timesheets list page.	Active

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User Group Memberships

Resource: Ted Ueberoth - Global Access Rights

Below are this resource's global rights.

Access Right Description
 Granted Through All ▼

<input type="checkbox"/>	Access Right▲	Description	Granted Through
<input type="checkbox"/>	Timesheets - Navigate	Allows user to access the timesheets list page. The user will only be able to see timesheets the user has edit or approve timesheets rights over.	Group: Timesheets - Access

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User Global rights

No OBS rights.

No Project - Edit Project Plan - All Allows user to add unplanned tasks to any Project when completing his or her timesheet if he or she is a team member on that Project - right

Resource: Ted Ueberoth - Instance Access Rights

Below are the rights this resource has for specific object instances.

Access Right Description
 Object All ▼

<input type="checkbox"/>	Access Right▲	Object	Description
<input type="checkbox"/>	Idea - Initiator (Auto)	Idea	Automatic right granted to the initiator of a Idea
<input type="checkbox"/>	Idea - Manager (Auto)	Idea	Automatic right granted to the manager of a Idea
<input type="checkbox"/>	Other Work - Manager - Automatic	Other Work	Automatic right granted to the manager of Other Work; equivalent to Other Work - Edit.
<input type="checkbox"/>	Resource - Enter Time	Resource	Allows user to complete and submit timesheets for a resource.
<input type="checkbox"/>	Resource - Self (Auto)	Resource	Rights automatically granted to a resource when created. Includes Resource - Edit Ideas.
<input type="checkbox"/>	User Favorites Menu - Edit	Portlet	Allows user to view and edit a favorites menu.

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User Instance rights

No -Project - Edit Project Plan - Allows user to add unplanned tasks to a specific Project when completing his or her timesheet if he or she is a team member on that Project. - right

Project: Project1 - Gantt

Filter: System Default

Task	Start	Finish	Duration	% Co...	Assigned Resources
Project1	2.12.2013	14.3.2014	75	0,00%	Ueberoth, Ted
Task1	22.1.2014	19.9.2014	173	0,00%	Ueberoth, Ted
Task2	24.1.2014	24.8.2014	151	0,00%	
Task3	24.1.2014	24.8.2014	151	0,00%	
Task4	24.1.2014	24.8.2014	151	0,00%	

Tasks and assigned resources. The resource is also assigned to the effort task.

THE TEST

Timesheets

Resource Name:

Resource ID:

Resource Status: Active

Type: All

OBS Unit:

My Rights: All

Total: to

Dates: By Time Period Custom Range

Timesheet Status: Open

Adjustment Views: All

	Resource	ID	Period Start	Timesheet Status	Adjusted	Adjustment	Total
<input type="checkbox"/>	Ueberoth, Ted	tedUberoth	16.12.2013	Open			0,00
<input type="checkbox"/>	Ueberoth, Ted	tedUberoth	23.12.2013	Open			0,00
<input type="checkbox"/>	Ueberoth, Ted	tedUberoth	30.12.2013	Open			0,00
<input type="checkbox"/>	Ueberoth, Ted	tedUberoth	20.1.2014	Open			0,00
<input type="checkbox"/>	Ueberoth, Ted	tedUberoth	27.1.2014	Open			0,00

Open Timesheets

Timesheet

Time Period: 27.1.2014 - 2.2.2014

Resource Name: Ted Ueberoth

Timesheet Status: Open

Investment	Description	Input Type Code	Charge Code	Mon 27.1	Tue 28.1	Wed 29.1	Thu 30.1	Fri 31.1	Sat 1.2	Sun 2.2	Total	ETC
	Total			0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00

Buttons: Add Task, Add Other Time, New Indirect Row, Submit for Approval, Populate, Cancel

Work Effort = Hours

[Configure] [Printable Version]

Timesheet opened

Timesheet

Time Period: 27.1.2014 - 2.2.2014

Resource Name: Ted Ueberoth

Modified by: Ted Ueberoth

Timesheet Status: Open

Last Modified: 24.8.2014 22:33

	Investment	Description	Input Type Code	Charge Code	Mon 27.1	Tue 28.1	Wed 29.1	Thu 30.1	Fri 31.1	Sat 1.2	Sun 2.2	Total	ETC
Tasks													
<input type="checkbox"/>	Project1	Project1	Normal									0,00	914,00
<input type="checkbox"/>	Project1	Task1	Normal									0,00	43,00
		Total			0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	

Buttons: Add Task, Add Other Time, New Indirect Row, Split, Delete, Save, Submit for Approval, Populate, Cancel

Work Effort = Hours

[Configure] [Printable Version]

Timesheet populated

Resource: Ueberoth, Ted | Time Period: 27.1.2014 - 2.2.2014 - Select Tasks

Group By: None

Task Name:

Task ID:

Show Tasks: **Assigned** (dropdown menu: All, Assigned, Not Assigned)

Task Status: Open

Investment Name:

Investment ID:

Buttons: Filter, Show All, Return

There are no tasks that match the filter criteria.

Against all odds Show Tasks drop down list includes Not assigned Not exactly as desired

Resource: Ueberoth, Ted | Time Period: 27.1.2014 - 2.2.2014 - Select Tasks

Group By: ▾

Task Name	<input type="text"/>	Task Status	<input type="text" value="All"/> ▾
Task ID	<input type="text"/>	Investment Name	<input type="text"/>
Show Tasks	<input type="text" value="Not Assigned"/> ▾	Investment ID	<input type="text"/>

There are no tasks that match the filter criteria.

However, selecting Not Assigned and clicking filter gives

There are no tasks that match the filter criteria

CONCLUSION

Prevent Unassigned Timesheet Tasks worked as designed in this single test.

REVISIONS

v.01 August 2014

The content of these pages is presented as personal views only and not as any sort of advice or instruction