

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 CA Clarity PPM Settings page. The user is logged in as Martti Kinnunen. The page has a navigation bar with 'Home', 'Administration', and 'Favorites'. The 'Settings' section is active, with two tabs: 'General' and 'Staffing'. The 'General' tab is selected, showing various configuration options. The 'Staffing' tab is also visible, showing options related to task creation and allocation.

General	Staffing
Default Load Pattern: Front	Round Allocations to Nearest %: 25
Guidelines URL:	Allow Effort Task Creation: <input checked="" type="checkbox"/>
First Month of Financial Quarter: Jan	Reassign Tasks when replacing Role: <input checked="" type="checkbox"/>
First Day of Work Week: Mon	Allow Edit of Allocations when Investment is Locked: <input type="checkbox"/>
Default Display Unit for Work Effort: Hours	Automatically Open Staff Members for Time Entry: Never
Enable Investment-specific Charge Codes: <input type="checkbox"/>	Show Tasks in Organizer: When Assigned
Allow posting of future timesheets: <input checked="" type="checkbox"/>	Automatically Add Staff Members As Investment Participant: When Added to Investment
Notify on Delete of Risk/Issue/Change Requests: <input type="checkbox"/>	Allow Override Requisition Approval: <input type="checkbox"/>
Only Export Current Baselines When Opening Investments in a Scheduler: <input type="checkbox"/>	Allow Mixed Booking: <input checked="" type="checkbox"/>
	Convert resources to roles when using templates (default): <input type="checkbox"/>
	Requisition Booking: Use Allocation Percentage

Save

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 Investment

Sorting Order
☒ Ascending
☐ Descending

Default Time Entry Options

Disable Indirect Time Entries ☐

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

☒ User Value 1 Lookup Time Entry User Lookup field 1

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 Hours

Decimal Places 2

Enable Note Date ☐

Apply to All Resources

Restore Defaults

Save

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

Home

Administration

Favorites

Projects

Filter: System Default

<input type="checkbox"/>	Project▲	Prevent Unassigned Timesheet Tasks				
<input type="checkbox"/>	Mstone					mstone
<input type="checkbox"/>	Project1		✓			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"/>	ztrhough					ztrhough
<input type="checkbox"/>	zWBSlevel					zWBSlevel

Save

New

New from Template

Mark for Deletion

Cancel Deletion

Prevent Usassigned 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
Displaying 1 - 1 of 1			
<div>AddRemoveContinueReturn</div>			

User Group Memberships

Resource: Ted Ueberoth - Global Access Rights			
Below are this resource's global rights.			
Access Right		Description	
Granted Through		All▼	
Filter		Show All	
		Clear	
<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
Displaying 1 - 1 of 1			
<div>AddRemoveContinueReturn</div>			

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▼	
Filter		Show All	
		Clear	
<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.
Displaying 1 - 6 of 6			
<div>AddRemoveContinueReturn</div>			

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 All Open Time Periods ▼

☐ Custom Range From: To:

Timesheet Status: Open ▼

Adjustment Views: All ▼

Filter Show All Clear

	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	

[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
<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	

[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:

Task Status: Open

Investment Name:

Investment ID:

Show Tasks: **Assigned**

[Filter](#)
[Show All](#)

All
 Assigned
 Not Assigned

There are no tasks that match the filter criteria.

[Return](#)

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