
“My Assignments” Portlet

Understanding the “My Assignments”
Portlet



What Are The Assignment Portlets

- Provide a view of resource assignments for Planned Work (Projects & Small Enhancements) not on hold and open for time entry.
 - Displays pertinent information about the assignment's planned and actual hours, dates, and status.
 - Filterable by various parameters (i.e. project, status, resource, etc.)
- Available on the:
 - Overview: General tab for each individual's *My Assignments* portlet.
 - Overview: Organizational Assignments tab for Project Mgrs, Resource Mgrs, and IT Leadership to access the *Organizational Assignments* portlet.

Organizational Assignments portlet for Project Mgrs, Resource Mgrs, & IT Leaders

My Assignments portlet for each person

Project	Project Status	Project Manager	Task	Status	Assignment Indicator	Actuals	Pending Actuals	Remaining Work	Start Date	Finish Date	Baseline Finish Date
2013.05.14 (MM) Create Wound Procedure Area DEP/HOD	◆	Maxim, Dorothy	Requirements Design, Build, & Testing Activities	Not Started	◆	0	0	(0)	7/12/12	4/30/13	12/11/12
EB 2013.04.23 (MM) Lab Label Printing (PLF) in Perioperative Areas	◆	Maxim, Dorothy	Requirements Design, Build, & Testing Activities	Started	◆	3	0	15	7/31/12	12/3/12	11/26/12
IHS 2012 Upgrade	◆	Mackay, Allene	Scheduling & ADT Application Build & Testing	Not Started	◆	0	0	25	1/7/13	1/18/13	12/21/12
IHS 2012 Upgrade	◆	Mackay, Allene	Scheduling & ADT Integrated Testing	Not Started	◆	0	0	25	1/7/13	1/18/13	1/18/13
IHS 2013 Upgrade	◆	Mackay, Allene	Deployment	Not Started	◆	0	0	0	1/18/13	1/18/13	1/18/13

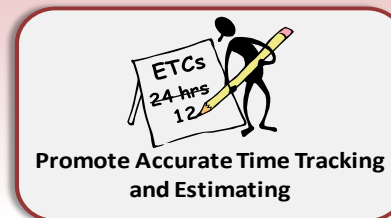
Goal Of Assignment Portlets

- Goal of the Assignment Portlets:
 - Increase visibility to current and future planned work assignments, their status and possible constraints or issues.
 - Promote communication between all levels of IT Staff by providing a standard view of work assigned, assignment status, and access to task guidelines and notes.
 - Promote accurate time tracking and work effort estimations.

Resource Manager	Project Manager	Resource / Role	Project	Project Status	Task	Status	Assignment Indicator	Actuals	Pending Actuals	Remaining Work	Start Date	Finish Date	Baseline Finish Date
			CCCT - Design and Initial Construction	Not Started	proj_MCP Project Administration and Meetings	Not Started	Not Started	0	1	159	7/21/12	12/31/13	
			L3 Health Coach (P. Neta) Data Base	Not Started	Requirements Gathering	Not Started	Not Started	10	2	12	12/18/12	1/16/13	
			CAR - Northwood & High 259, 231 & 255	Not Started	Project Administration and Meetings	Not Started	Not Started	20	6	138	10/22/12	2/5/13	11/14/13
			Clinical Research Management Implementation (CRMI)	Not Started	Project Administrative Activities	Not Started	Not Started	500	5	64	12/1/11	1/16/13	1/16/13
			RelayCare v5.x Upgrade	Not Started	Project Admin Activities	Not Started	Not Started	21	1	3	11/13/12	1/23/13	12/1/12



Visibility & Communication



Assignment Portlets - Visibility

- Visibility to assignment status, effort and schedule requires an understanding of how the indicators and values are derived.
- Key fields to understand are:

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1

2

3

4

5

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			CCCT - Design and Initial Construction	◆	paa_MCEP Project Administration and Meetings	 Not Started	◆	0	1	159	7/31/12	12/31/13	
			LSI Health Coach (Pt. Note) Data Base	◆	Requirements Gathering	 Started	◆	10	2	12	12/18/12	1/16/13	
			C&R - Northwood & High 259, 231 & 285	◆	Project Administration and Meetings	 Started	◆	20	6	138	10/22/12	2/5/13	11/14/13
			Clinical Research Management Implementation (CRMS)	◆	Project Administrative Activities	 Started	◆	500	5	64	12/13/11	1/16/13	1/16/13
			RelayCare v5.x Upgrade	◆	Project Admin Activities	 Started	◆	21	1	3	11/13/12	1/23/13	12/12/12

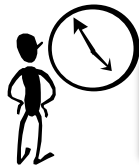
#	Term	Definition	Notes
1	Status	Based upon whether resource has posted any time to this assignment	<ul style="list-style-type: none"> • Will change to Started once hours posted. • Will change to Completed when hours are posted and remaining work = 0
2	Assignment Indicator	Real time status based upon pending actuals & remaining work data	<ul style="list-style-type: none"> • Green = No Concerns • Blue = Availability Warning (resource availability \leq remaining work) • Yellow = 75/75 Warning (at least 75% of the assignment's time period is gone, but less than 75% of the work is done) • Red = Late Assignment (work is not done, and today is later than finish date)
3	Actuals	Posted timesheet entries toward this assignment	<ul style="list-style-type: none"> • Direct impact to Status
4	Pending Actuals	Timesheets entries that have been saved but not posted	<ul style="list-style-type: none"> • Direct impact to Assignment Indicator and Remaining Work
5	Remaining Work	Delta between ETC and any pending actuals & pending ETCs	<ul style="list-style-type: none"> • Changes immediately upon saving time or proposed estimated time to complete (ETCs) within a timesheet

- Use of Task Guidelines and Notes icons, within the Assignment Portlets, further enhances communication between all levels of IT Staff.

Inputs To Assignment Portlets

- The Assignment Portlets are built from information entered in timesheets and project plans.

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Staff Input

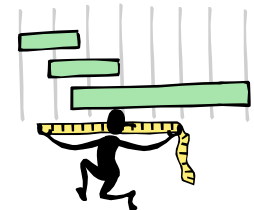
Timesheet Entries

- Daily time worked on the assignment
- Proposed increase or decrease to Estimated Time to Complete (ETC)
- Task Timesheet Notes about the assignment

Project Mgr Input

Project Plan Entries

- Resource Assignments
- Start & Finish Dates
- Baselines
- Estimated Time to Complete (ETC)
- Approval of Proposed Changes to ETC
- Task Notes and Associated Risks/Issues

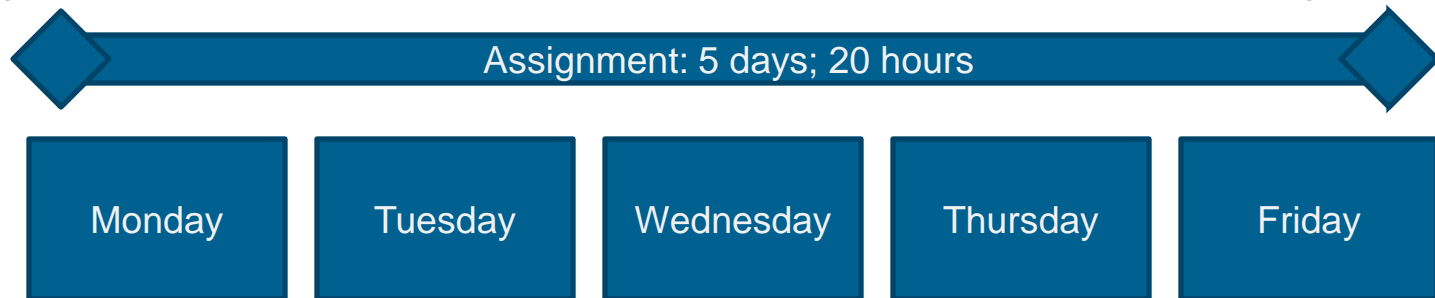


How The Portlet Works - Example

- **The Assignment:**
 - Wally has a 5 day assignment estimated at 20 hours.
- **Resource Stats:**
 - Daily Availability = 8
 - Work Day Exceptions = None

Assignment Start

Assignment Finish

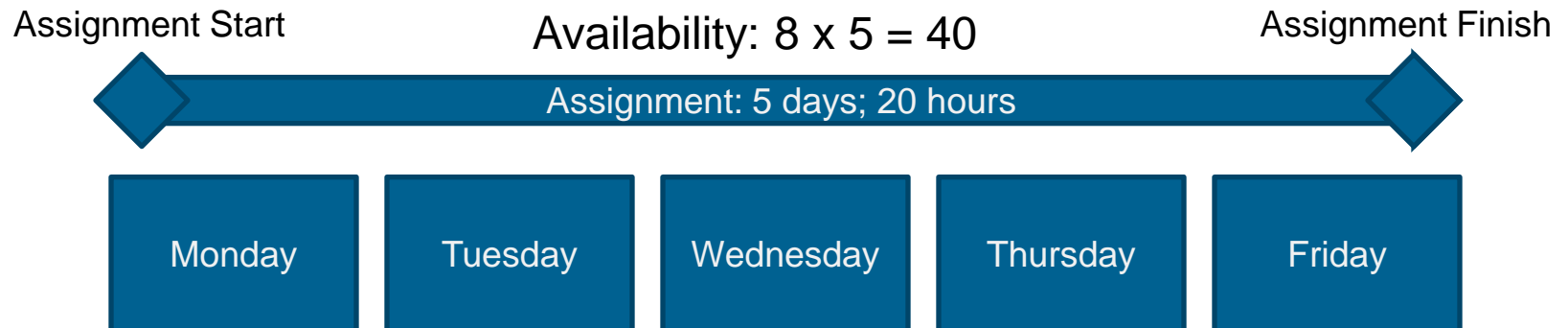


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How The Portlet Works - Resource Availability

- **Resource Availability for Assignment Duration:**

- As a full time employee with no workday exceptions during assignment's duration, Wally's availability for the assignment's duration is his daily availability multiplied by his workdays. (Note: Portlet does not consider other assignments when determining availability.)



Assignment Indicator: On Schedule



- ✓ 5 day assignment estimated at 20 hours
- ✓ 40 hours of availability for the assignment duration

Assignment Status: Not Started

- ✓ No work done

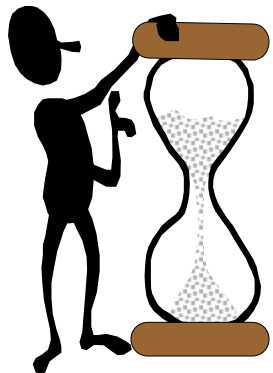
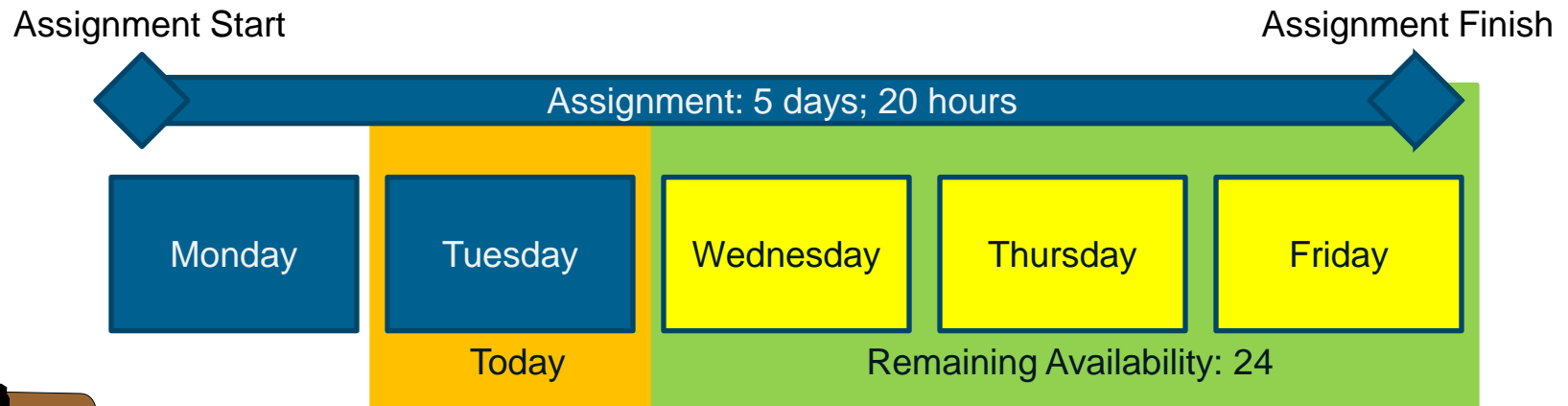


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How The Portlet Works - Remaining Availability

- **Resource Remaining Availability:**

- Remaining availability equals the full workdays including finish date. (In order to avoid any no-win “today” calculation issues, remaining availability does not count today.)
- On Tuesday, Wally has 24 hours of remaining availability.



Assignment Indicator: On Schedule

Assignment Status: Not Started



- ✓ 5 day assignment estimated at 20 hours
- ✓ 24 hours of remaining availability

- ✓ No work done

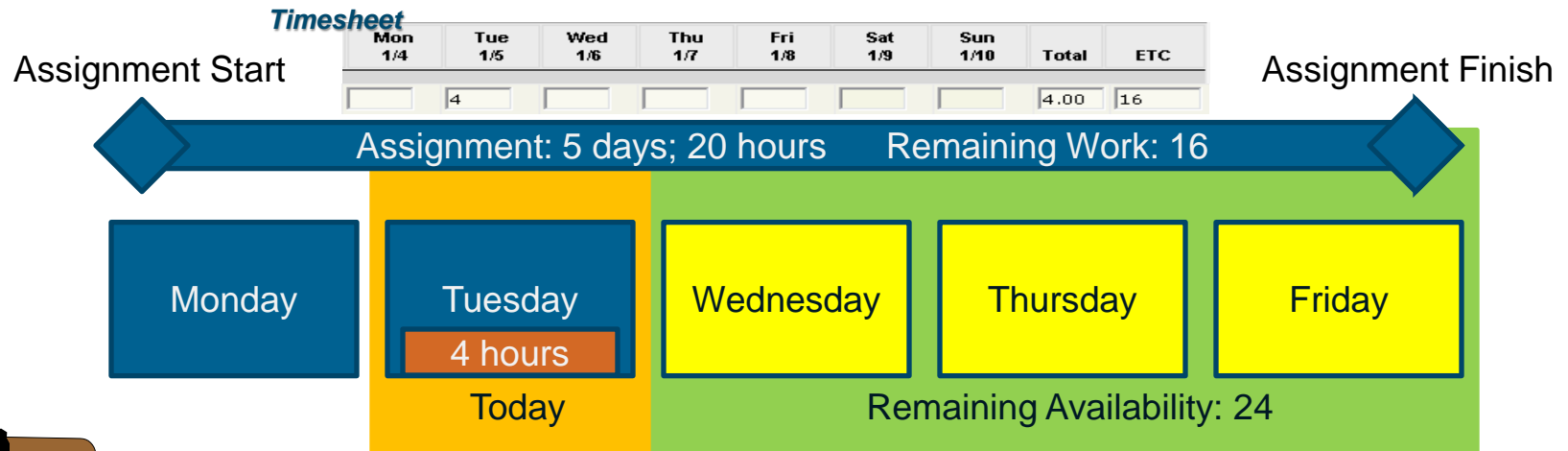


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How The Portlet Works – Resource's Remaining Work

Resource's Remaining Work:

- Wally works a couple hours on his assignment and diligently saves 4 hours to his timesheet for this task assignment. (Portlet will show the 4 hrs in pending actuals.)
- Wally's remaining work is now 16 hours (assignment minus pending actuals).



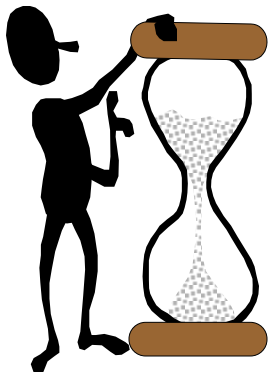
Assignment Indicator: On Schedule



- ✓ 5 day assignment estimated at 20 hours
- ✓ 24 hours of remaining availability

Assignment Status: Started
(status changes when time has posted)

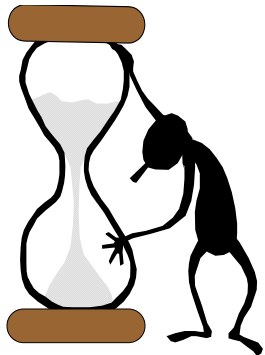
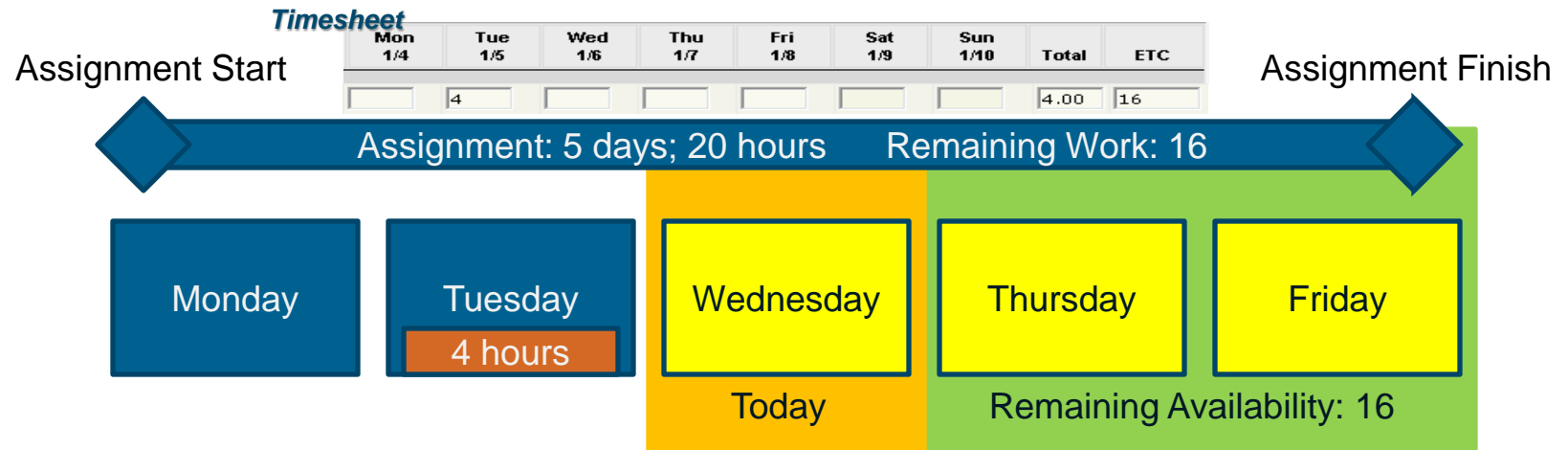
- ✓ 4 hours of work entered in timesheet
- ✓ 16 hours of remaining work



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How The Portlet Works - Resource Availability Warning

- **Assignment Indicator – Resource Availability Warning:**
 - When the resource's remaining work is greater than or equal to their remaining availability, the assignment indicator goes blue with an Availability Warning.
 - On Wed, Wally should work on this and/or notify the Project Mgr it could be late.



Assignment Indicator:
Availability Warning

Assignment Status: Started



- ✓ 5 day assignment estimated at 20 hours
- ✓ 16 hours of remaining availability
- ✓ 16 hours of remaining work

- ✓ 4 hours of work entered in timesheet
- ✓ 16 hours of remaining work

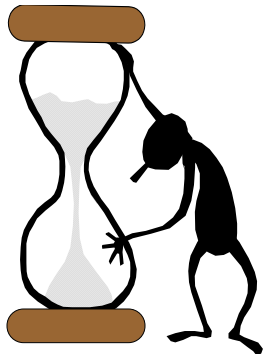
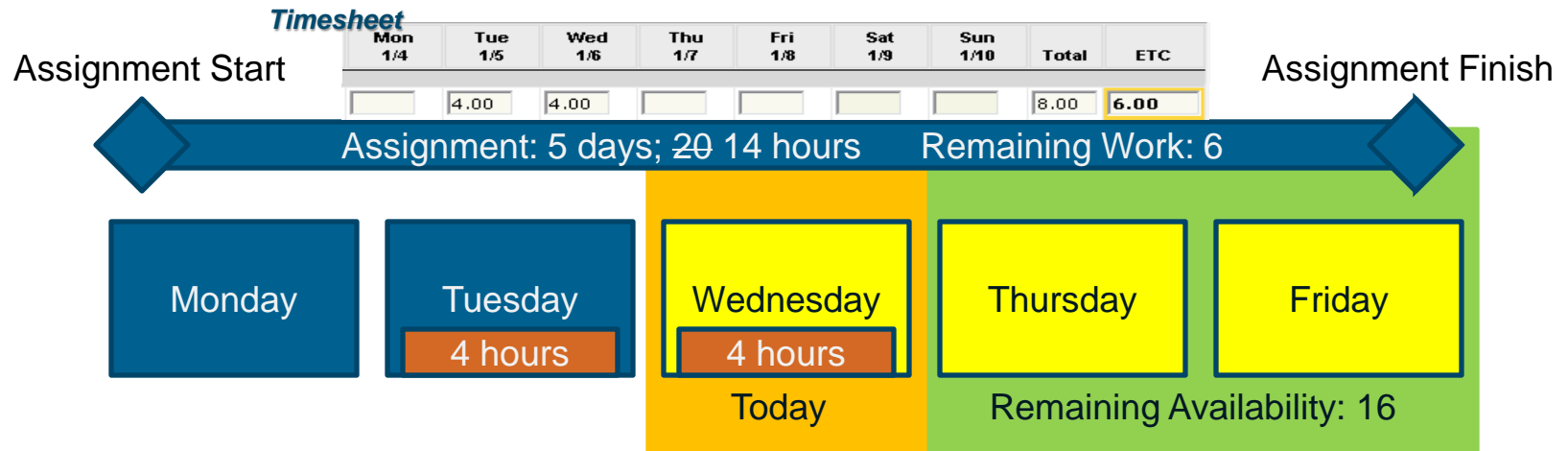


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How The Portlet Works - Back On Schedule

■ Assignment Indicator – Back On Schedule:

- Wally works 4 hours on Wednesday, and feels confident there is only 6 more hours of effort.
- Wally logs 4 hours to his timesheet and adjusts his ETC down to 6 – making this now a 14 hour assignment.



Assignment Indicator: On Schedule

Assignment Status: Started



- ✓ 5 day assignment re-estimated at 14 hours
- ✓ 16 hours of remaining availability
- ✓ 6 hours of remaining work

- ✓ 8 hours of work entered in timesheet
- ✓ 6 hours of remaining work



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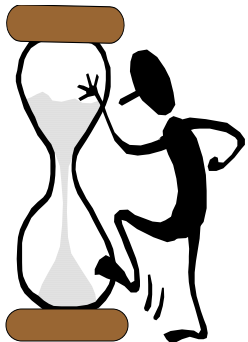
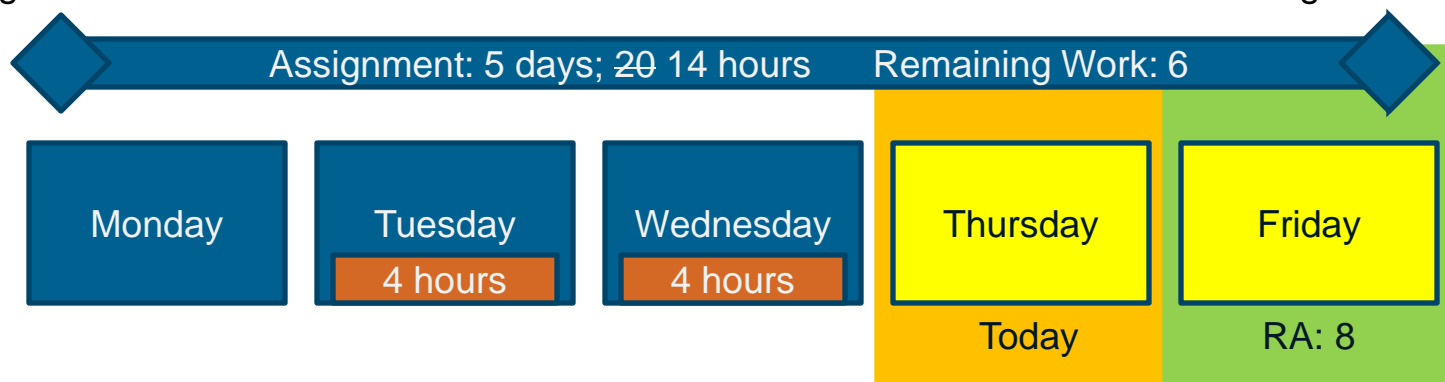
How The Portlet Works - 75/75 Warning

■ Assignment Indicator – 75/75 Warning:

- 75/75 Warning compares assignment's duration % expended against the work's % expended.
- On Thursday for this assignment, it is now 80% through the duration and work is only 57% complete, so the 75/75 Warning appears.
- Again, Wally should work on this and/or notify the Project Mgr it could be late.

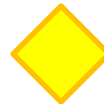
Assignment Start

Assignment Finish



Assignment Indicator:
75/75 Warning

Assignment Status: Started



- ✓ 5 day assignment estimated at 14 hours
- ✓ 8 hours of remaining availability (80% through assignment)
- ✓ 6 hours of remaining work (57% through his work)
- ✓ 8 hours of work entered in timesheet
- ✓ 6 hours of remaining work

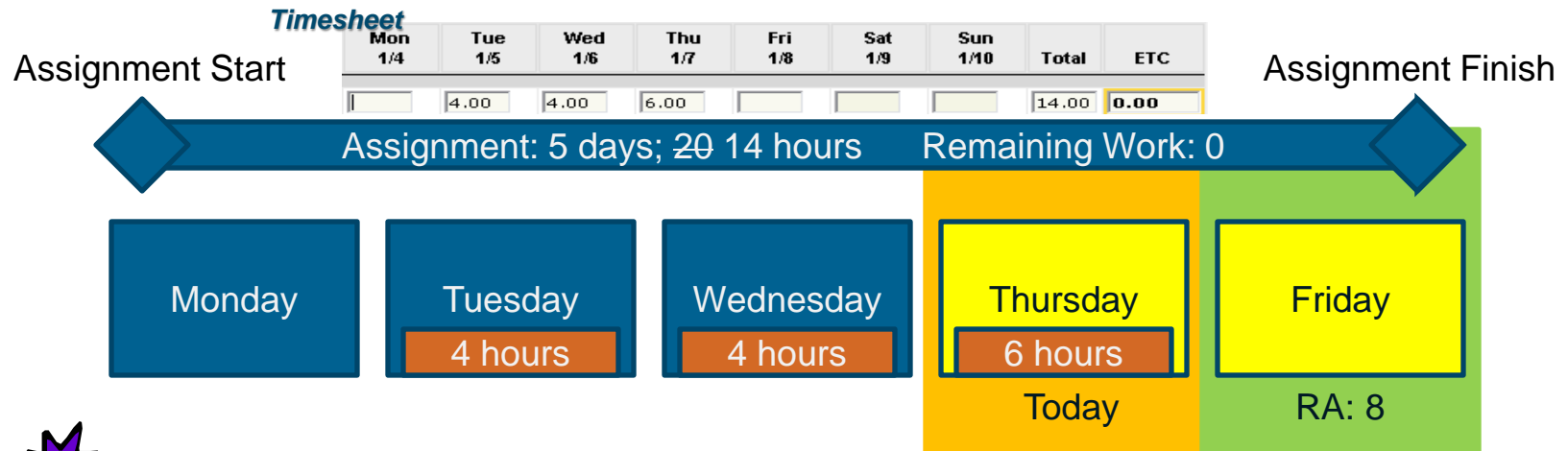


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How The Portlet Works - Assignment Complete

Assignment Status – Complete:

- Assignment status is based off of posted hours and remaining work.
- Wally worked hard on Thursday, finished the assignment, entered 6 hours on the timesheet and verified the ETC = 0 to indicate the assignment is complete.



Assignment Indicator: On Schedule

Assignment Status: Complete
(status changes when time has posted)

- ✓ 5 day assignment estimated at 14 hours
- ✓ 8 hours of remaining availability (80% through assignment)
- ✓ 0 hours of remaining work (100% through his work)
- ✓ 14 hours of work entered in timesheet
- ✓ 0 hours of remaining work



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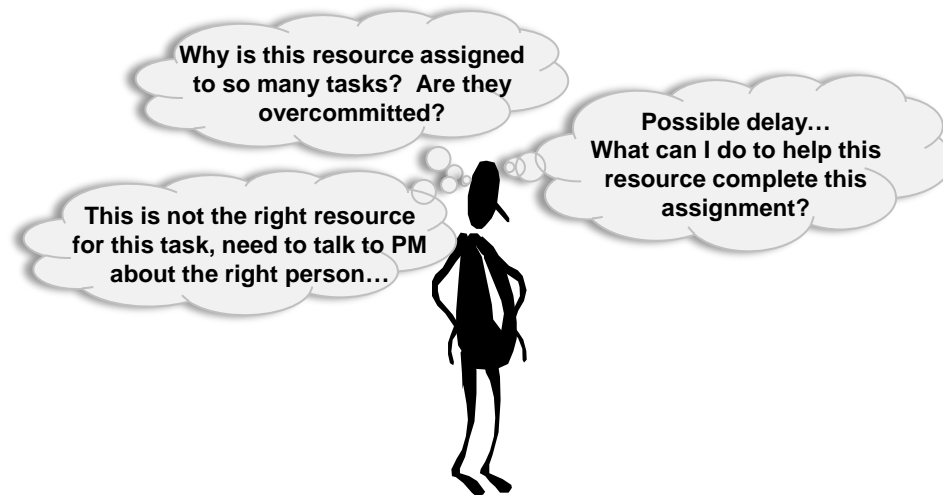
Benefits Of Using The Portlets

Staff



- Visibility to your assignments, work estimations, and task notes
- Better time and work management
- Improved customer service
- Open lines of communication between staff, Project Mgrs and Team Mgrs

Managers



- Visibility into team member assignments and timesheet notes
- Focus on exceptions & potential issues
- Help plan for upcoming work
- Gain improved visibility into resource availability

Summary

- **Use timesheet entries to:**
 - Update actual time spent on the task daily
 - Make adjustments to estimated time to complete(ETC) of the task
- **Review the Assignment portlet regularly for:**
 - New assignments
 - Adjusted dates and/or estimated time to complete (ETC)
 - Tasks at risk of not being completed on time
- **Communicate with your Resource Manager and Project Manager**
 - Ask questions of new tasks you were not aware of
 - Make sure managers understand issues that may cause a task to not be completed on time
- **Remember: A blue, yellow, or red indicator is not bad.**
 - It simply indicates there is a potential issue and should prompt communication between the staff member, project manager and/or resource manager.



Any Questions?

- If you have any questions, please contact your Portfolio manager or the CA PPM Administrator.

