Time Management: Entering Time into Clarity

Objective

Provide instructions for entering time worked into Clarity.

Document Quick Links

- **Time Entry Instructions** (***summary***) ***(details)***
  - Critical Must Knows

  (Can use a combination of the following options)
  - Option A: Create Task entries using **POPULATE** (***details***)
  - Option B: Create task entries using **ADD TASK** (***details***)

- **Future Non-Work/OOO Instructions** (***summary***) (***details***)

- **OPTIONAL: Personalization of Timesheet** (Configure Populate options) (***details***)
  - *The task start/finish is within one week prior and one week after the current time period.*
  - *Copy time entries from previous timesheet if task is still open*
    - *Include actuals from previous timesheet*

Clarity/Workday integration occurs for CVS Health internal DDAT exempt employees that enter their PTO & floating time in Clarity under project ITPR001168 - Non-Work (OOO - Employees). See the associated job aids if you fall in this group.

Job Aid Overview

Accurately recording time against projects is important to ensuring the integrity of project financials and the accuracy of project data. Every person's time worked on a project MUST be recorded accurately and according to specific standards. This job aid includes a list of the key standards that you must follow, as well instructions on how to enter time worked into Clarity.

Time Entry Standards

- Single Sign-on requires that you have active Network ID's and keep your network passwords current.
- The time entry week runs from Sunday to Saturday.
- Time should be entered by End of Day on Friday.
  - For areas that have shift work and/or individuals who work on Saturday, you MUST complete your time sheets by 11:59pm Saturday (your time zone) of each week.
- Record all your time accurately, including time worked over 40 hours. Ensure you charge your time to the correct task assignments.
- All time worked on a Large (CVS agile, CVS XP, CVS Scrum or HCB EDF) project must be charged to the correct phase as well.

Time Entry Delegation / Approval Standards

- No vendor contact/admin is allowed to enter time for vendor resources.
- Only the CVS Health resource manager can enter time on the resource's behalf in situations where the resource is sick or left without entering time, etc.

- CVS Health resource managers should enter a ***Delegate Resource Mgr*** form in Clarity prior to being out of office to allow another internal resource to cover for them.
- Consultants cannot be resource managers or approve timesheets in Clarity. If this happens, Clarity will revert resource manager back to internal employee and return timesheet.

Non-Work / Out of Office (OOO) time forecasts

- Resource can enter and save future Non-Work/OOO time to allow Resource Manager and Project Managers to more accurately forecast deliveries. "Project" time should not be pre-entered.
- Future time Non-Work/OOO can be adjusted and submitted just prior to resource beginning the OOO event. Note for financial integrity, any timesheet (except Leave of Absence or Military Leave) submitted beyond four (4) weeks in the future will be returned to an open status.

Clarity Job Aids and FAQ's *see links (Time Entry) (Classic PPM)*

- At_a_Glance - Clarity Navigation and Time Entry by Basic User
- Clarity Quick Start
- Resource Management - Delegate Resource Manager
- Time Management - FAQ - Can't Add Task to Timesheet
- Time Management - FAQ - Timesheet Adjustment
- Time Management - FAQ - Timesheet View and Reporting
- Time Management - Forecasting Non-Work_OOO time
- Clarity - Editing Browser Bookmarks

Workday Integration

- Clarity Workday Integration
- Time Management - FAQ – Workday Adjustment

Agile PMO SharePoint site| Time Management

- DDAT Time Recording Guidelines
- Clarity Time Entry for Hours of Non-Worked Tasks

IT Service Center

- Access Issues, myPassword

Time Entry Summary Instructions *(hyperlink to details)*

Step	Description *(Further details and screen prints are available on pages 3-9.)*
1	Log onto Clarity (If you do not have access, contact the IT Service Center)
2	Access the time entry function via the ***Current Timesheet*** icon. (If this is your first access to Clarity, you will need to select the appropriate period – prior or current – for which to enter time.)
3	Create a list of the projects and tasks against which you'll be recording your time. a. *Use the 'Add Task' function to select the task(s) that you want to charge time against.* b. *Use the 'Populate' function if you want to see all of the tasks against which you can charge time.*
4	Enter the time for each day of the timesheet week for each task on which you worked. Remember to enter time in decimal increments.
5	Click on the ***Save*** button to review the information you've entered, including total time charged.
6	Once you've completed your time entry, click on the ***Submit for Approval*** button.

Future Non-Work/OOO Summary Instructions *(hyperlink to details)*

Step	Description *(Further details and screen prints are available on pages 10-11.)*
1	Hover over Home and select Timesheets from the Personal section.
2	Filter for "all open periods" • **Note:** Manager may also need to filter with Resource ID or Name
3	Select the time period which is planned for Non-Work/OOO activities.
4	Use the "Add Task' function to select the Non-Work/OOO tasks
5	Select the Non-Work/OOO project tasks and click ***Add***.
6	Enter the time for each day of the timesheet week for each task on which you plan to be out • "Project" time should **NOT** be pre-entered...

7	Click on the ***Save*** button. **DO NOT *Submit***. • Future time Non-Work/OOO can be adjusted and re-saved as needed. • You will complete and submitted the timesheet just prior to beginning the OOO event. • **Note:** For financial integrity, any timesheet (except Leave of Absence or Military Leave) submitted beyond four (4) weeks in the future will be returned to an open status.
8	Select another time period or ***Cancel***.

Time Entry Detailed Instructions

Return to Top

Critical Must Knows

Resources that have not logged-in to Clarity within the last 60 days will be deactivated

- All IT Resources must access Clarity and enter their own time. There are no exceptions to this rule.
- Only the Internal CVS/Aetna Resource Manager can enter time on the resource's behalf in short term situations where the resource is sick or left without entering time, etc.

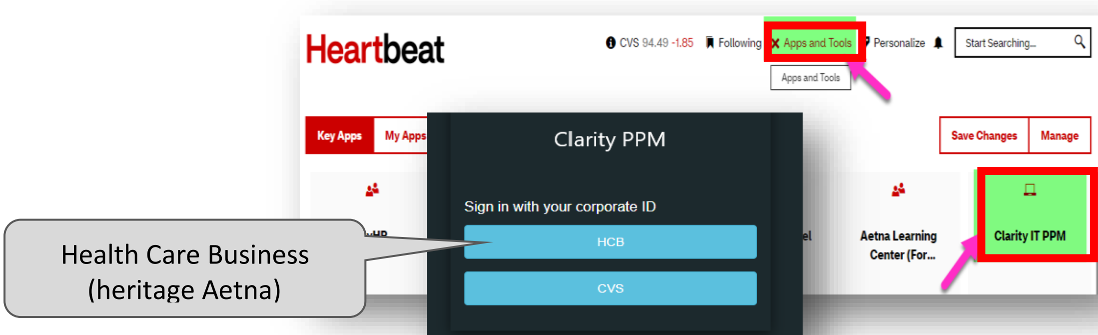
Network Access – Password resets

- First Time Users or Resources who need to change or unlock their password will need to enroll and set security questions in the MyPassword Tool
- See the MyPassword FAQ's and MyPassword User Guide (Heartbeat or IT Central)

- **Network (Windows) passwords must be changed every 90 days**.
  - 30 days prior to expiration you will begin to receive notices from an unmonitored mailbox. Consultants who do not monitor their CVS Health email, should consider setting a rule to forward emails from this sender or putting a reminder in your calendar.
  - If a user fails to logon within 90 days, the Network ID (NTID) will be locked.

Step 1 – Log onto Clarity

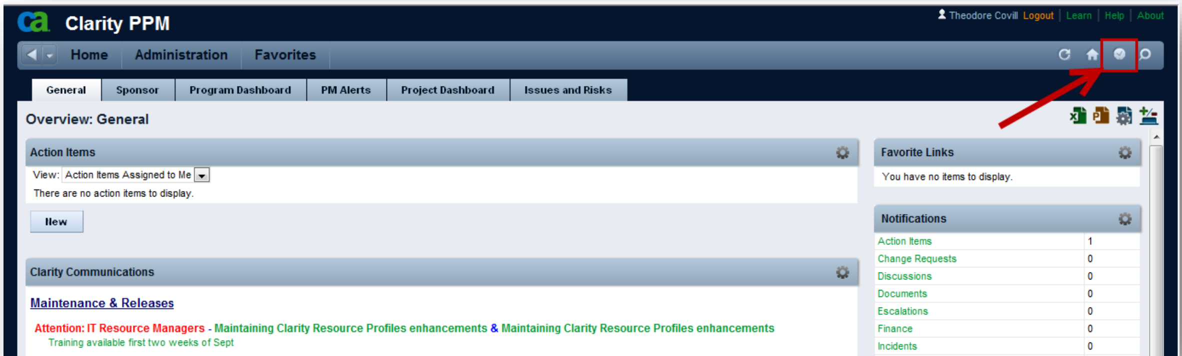
- Clarity is accessed via a Single Sign-on (SSO) to a vendor hosted site. You can access the URL from
  - The link provided in the "Welcome" Email
  - **Heartbeat** / Apps and Tools **(**Note that if you are actively logged into Heartbeat, it may bypass the Enterprise logon page)
  - Saved browser favorites
- Login with your NTID and Password credentials



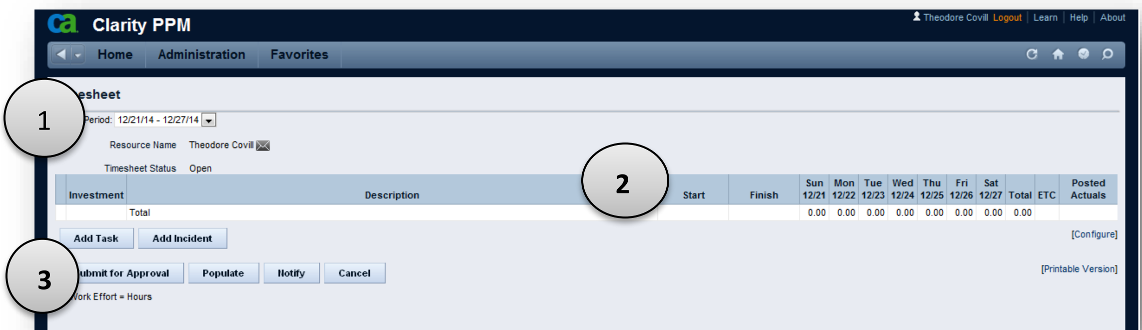
Once you reach the SSO page, you click the appropriate box HCB (Aetna) or CVS
Once you've logged into Clarity, your home page will display:

Step 2 – Access the Time Entry function

From the Clarity home page, click on the ***Current Timesheet*** icon at the top right of the home screen, as shown below:



The following ***Timesheet*** screen will appear:



Here are some of the key areas on the screen:

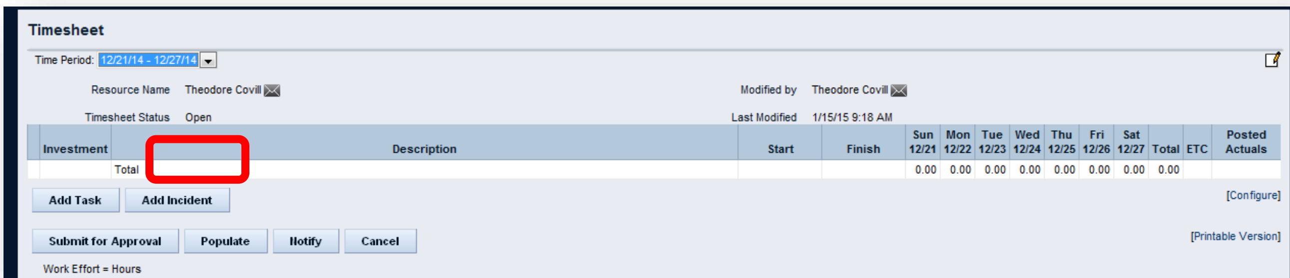
1. ***Time Period*** – This defaults to the current week's timesheet. You should be entering time for **this week only**; however, you will have the option to view other weeks.
2. ***Header Information*** – You will be shown how to populate the area below this with actual project & task information momentarily. Note that the days and dates of the current week are displayed on the right.
3. ***Activity Buttons*** – You will use these buttons to execute functions needed to populate and submit your timesheet.

Step 3 – Create a list of Projects and Tasks for Recording Time

You have two options to create the list of projects/tasks against which you'll be recording your time. You may choose to use a combination of both.

Option A – 'Populate' Function

The first option for creating the list of tasks against which you will charge time uses the ***Populate*** button on the ***Timesheet*** screen.



Clicking the ***Populate*** button will <u>automatically</u> add ALL of the tasks to which you've been assigned to your timesheet in the system Default setting

- **OPTIONAL: Personalization of Populate Options (*details*)**
    - *The task start/finish is within one week prior and one week after the current time period.*
    - *Copy time entries from previous timesheet if task is still open*
        - *Include actuals from previous timesheet*

Recommendation *– If you are assigned to 10 or less tasks, use the default* ***Populate*** *option. Even if you did not work on all 10 tasks, it will be easy to find the tasks against which you will need to enter time.*

If you are assigned to more than 10 tasks, you may find that personalizing how the Populate options are configured (see scenarios) or using the ***Add Task*** *option provides more control on the number of tasks displayed on your timesheet and the ease of finding the task to enter time.*

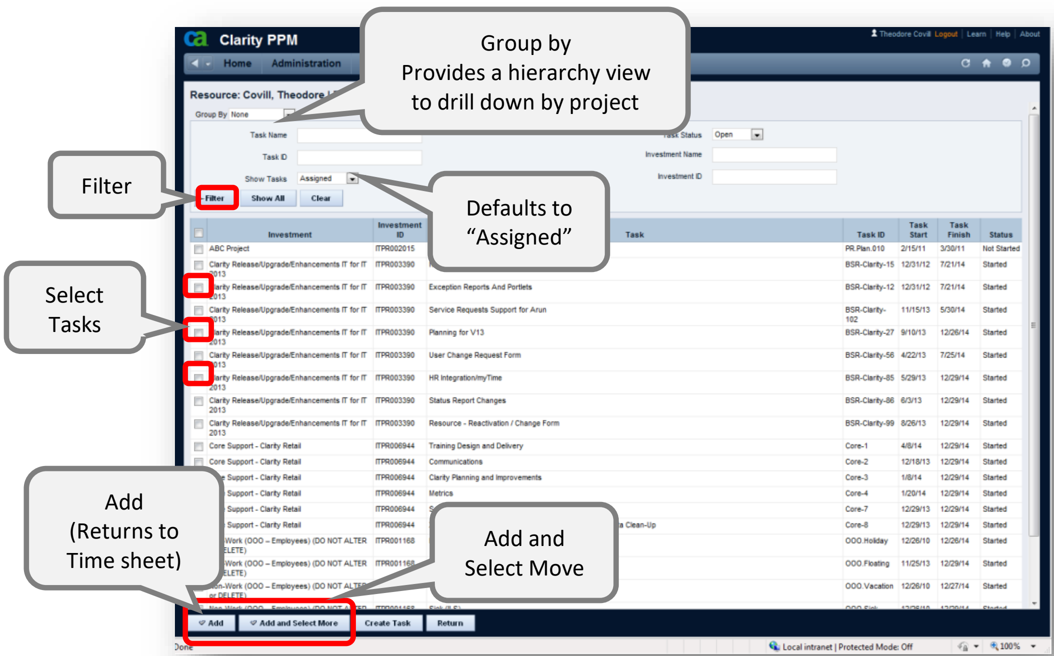
Option B – 'Add Task' Function

This option is used when you want to only populate your timesheet with tasks against which you are going to charge time. This is especially useful if you are <u>assigned</u> to a large number of tasks but are only working on a small set of them.

To start, click on the ***Add Task*** button as shown below:

A screen showing all of the tasks against which you can charge time appears, as shown below. ***NOTE*** *– If you are assigned to more tasks than can be displayed on one screen, navigation buttons will appear at the bottom of the list.*

If you do not see a task that you've worked and against which you need to charge time, first change the Show Tasks to "all" and click Filter, then if you still don't see the task contact the ***Project Manager***.



At this point, you can browse the entire list of tasks and select the ones you wish to charge time against by clicking on the check box immediately to the left of that task. If you need to move to subsequent screens, you should click the ***Add and Select More*** button at the bottom of the screen. This will add the task(s) you've selected on this screen to your timesheet, and then allow you to proceed to another screen to select more tasks.

If all of the tasks that you worked are on this screen, then simply select them and click the ***Add*** button.

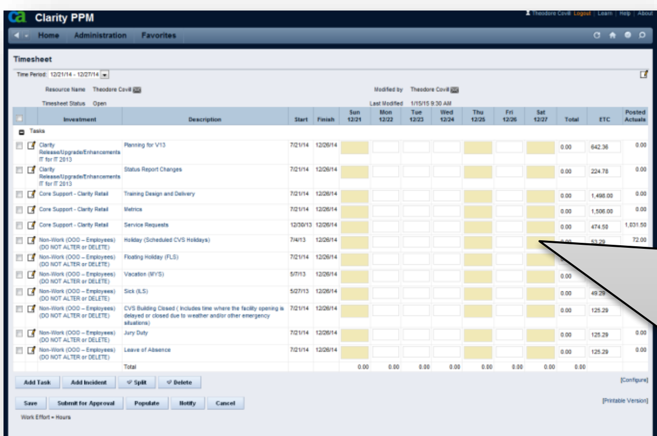
To reduce the number of tasks that are displayed for selection, you can use a Clarity feature called ***filtering***. You can use this feature if your tasks have similar characteristics, such as the same project, similar names, etc.

At the top of the screen, there are several prompts under the label ***Task Filter*** as shown below:

Enter the information you wish Clarity to use to find your tasks and click the ***Filter*** button. Only those tasks that meet the criteria you entered will display. You can then use the check boxes to select the tasks to add to your timesheet, as described above.

Step 4 – Entering Time

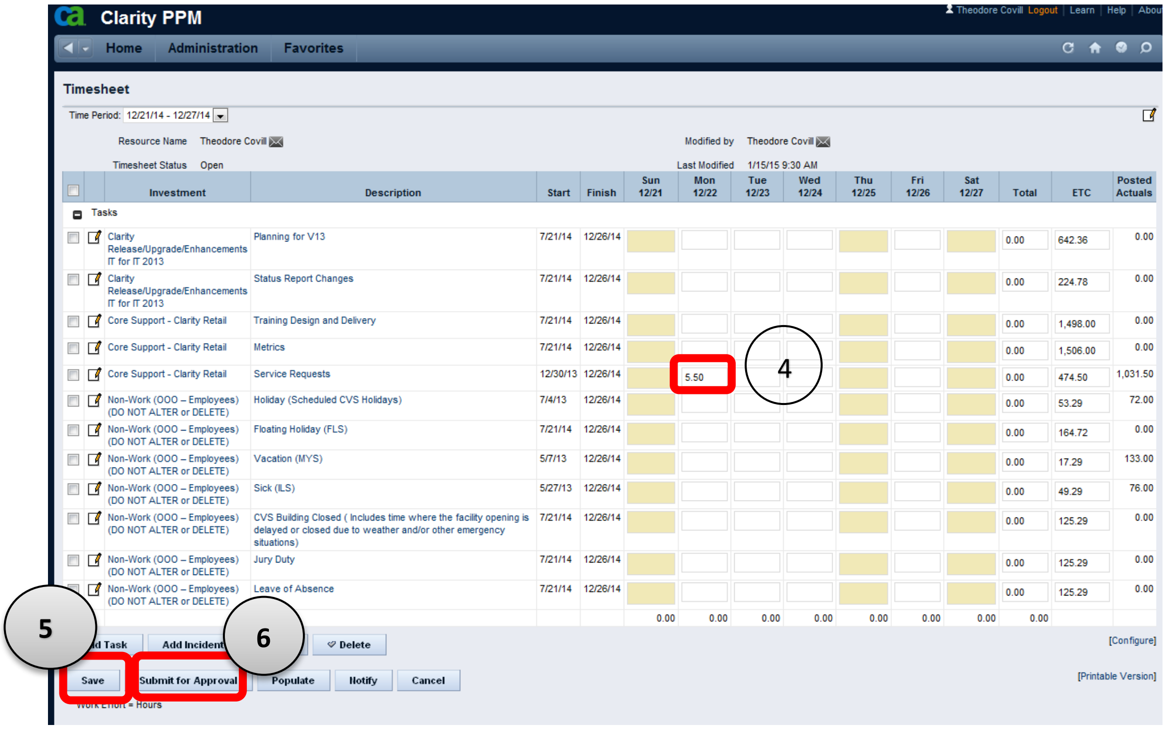
Once you've populated the timesheet with tasks, you can enter time against those tasks. A typical screen showing a timesheet with tasks prior to any time entry is shown below:



Shaded columns will be non-working days from the corporate base calendar. If you work a weekend or Holiday, you will enter time even if it's shaded.
DDAT organization requires a minimum 40-hour week. For Holidays, you will enter 8 hours against the Holiday task or Consultant Non-Work task.

Click in the box corresponding to the task and day on which you worked and enter the number of hours (in half hour decimal increments) that you are charging.

For example, if you worked 5 hours and 30 minutes on a particular task, enter **5.5** into the box corresponding to the task and day, as shown below:



Reference the [DDAT Time Recording Guidelines]() for details about which tasks to enter time on for your activities.

Step 5 – Using *Save* to Check Time Entered

If at any time you want to see a total of time you've entered BEFORE submitting the timesheet for approval, click on the ***Save*** button at the bottom of the screen (as shown above).

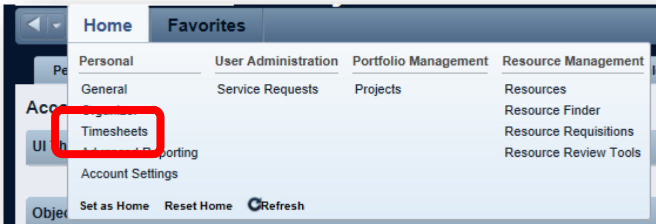
Step 6 – Submitting your Time

Once you've entered all of the time worked, click ***Save*** again to confirm your total time worked, and make any necessary changes. When you are satisfied that the information is accurate, click on the ***Submit for Approval*** button. The timesheet will now be sent to your manager for their approval.

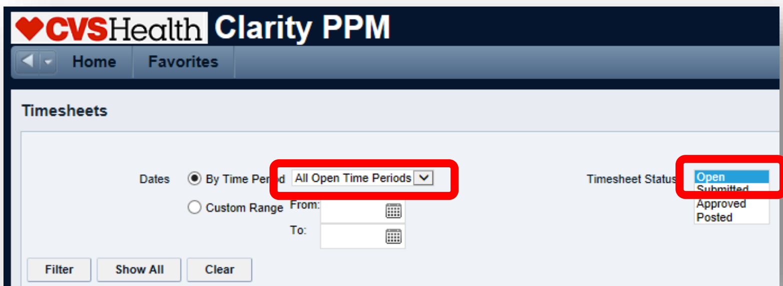
Future Non-Work/OOO Detailed Instructions

Return to Top

1. Hover over **Home** and select **Timesheets** from the **Personal** section.

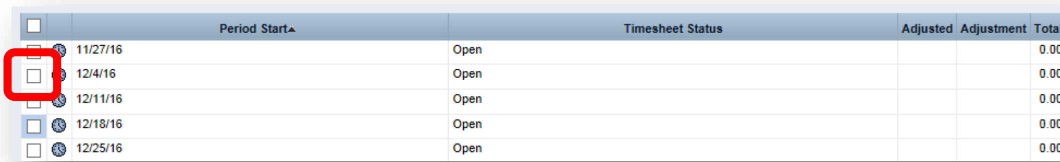


2. Filter for "all open periods"

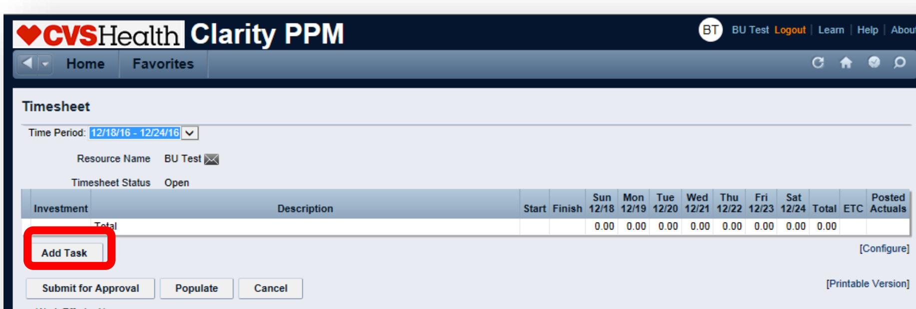


Note: Manager may also need to filter with Resource ID or Name. See Time Management - FAQ - Timesheet View and Reporting

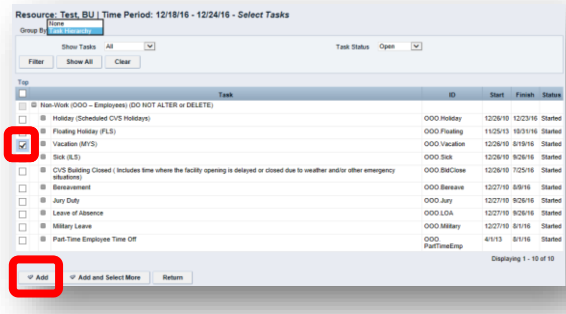
3. Select the time period which is planned for Non-Work/OOO activities.



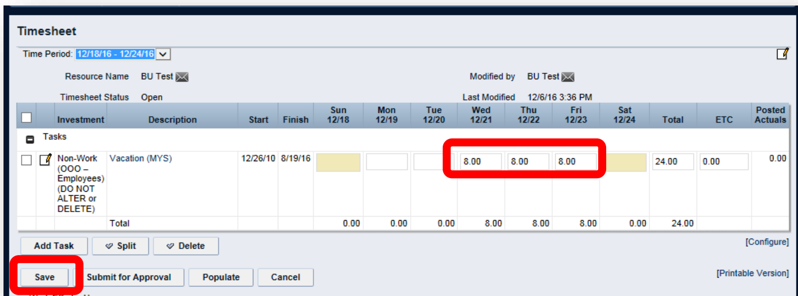
4. Use the "Add Task' function to select the Non-Work/OOO tasks



5. Select the Non-Work/OOO project tasks and click ***Add***.



6. Enter the time for each day of the timesheet week for each task on which you plan to be out.

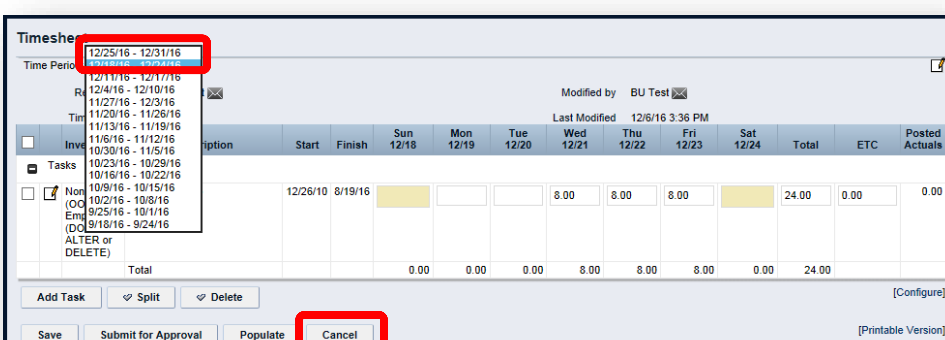


"Project" time should **NOT** be pre-entered.

7. Click on the ***Save*** button. **DO NOT *Submit***.

- Future time Non-Work/OOO can be adjusted and re-saved as needed.
- You will complete and submitted the timesheet just prior to beginning the OOO event.
- ***NOTE:*** *for financial integrity, any timesheet (except Leave of Absence or Military Leave) submitted beyond four (4) weeks in the future will be returned to an open status.*

8. Select another time period or ***Cancel***.

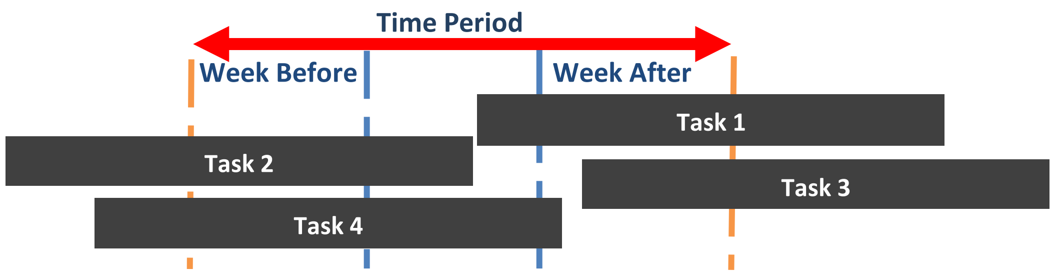


Personalize Timesheet Configuration	**Return to Top**

Global Default settings for Populate

*Global Configuration Options **currently implemented***

A. *Add tasks where the task start/finish is within one week prior and one week after the current time period*



B. *Copy time entries from previous timesheet if task is still open*

*Global Configuration Option **not currently implemented***

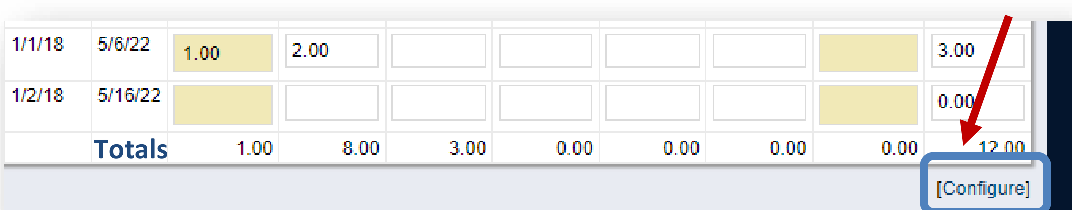
C. *Include actuals from previous timesheet:*

Scenarios vary by Role and Activities

Role	*Tasks*	*Personal Populate Preferences may be*	
Project team member where PM is maintaining Task assignments	*Different activities with different level of effort each week*	☒ ☒ ☐	***Populate tasks** (3-week window)* ***Copy from Previous*** *Include Actuals from Previous*
Production Support	*Same every week with same effort*	☐ ☒ ☒	*Populate tasks (3-week window)* ***Copy from Previous*** ***Include Actuals from Previous***
Engineer / Architect who does PRF estimation that is a team member of a large number of projects each having many tasks	*Different activities with different level of effort each week*	☐ ☒ ☐	*Populate tasks (3-week window)* ***Copy from Previous*** *Include Actuals from Previous*

Step 1 – Select Configuration

Navigate to the bottom right-hand corner of the timesheet and Click ***[Configure]***



The configuration page is presented.

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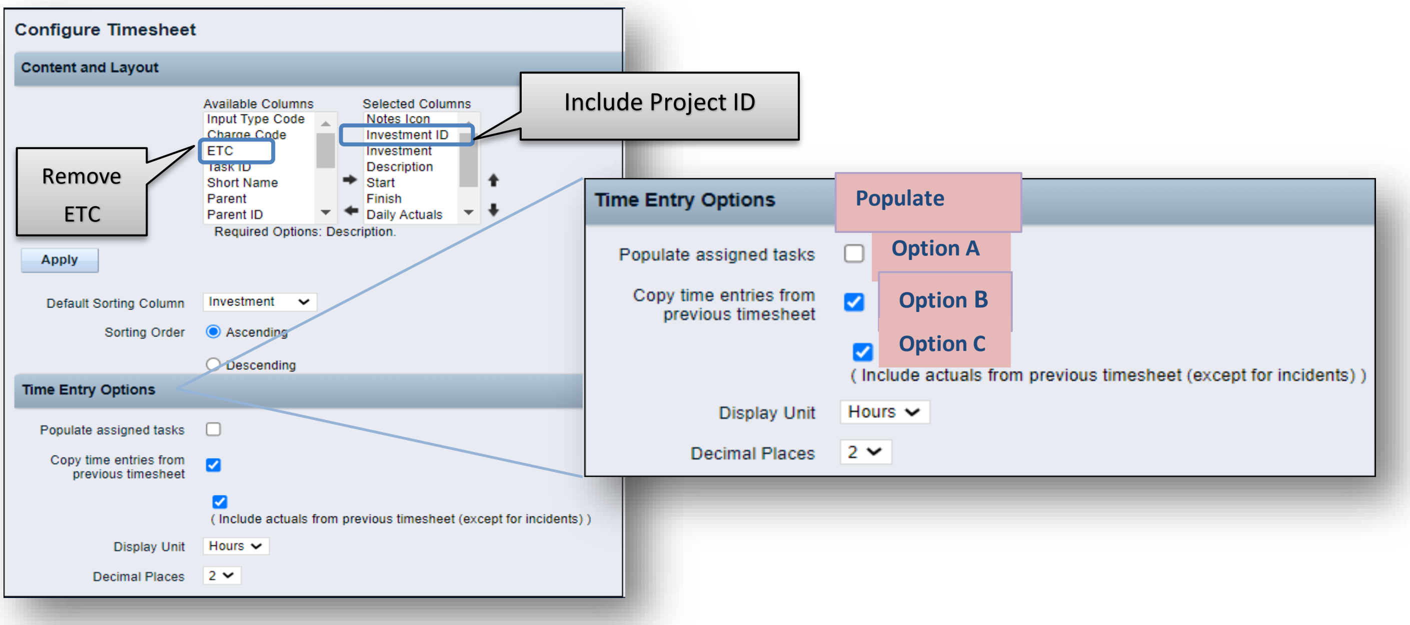
Step 2 – Set personal preferences

Update the ***Time Entry Option*** checkboxes based on the Scenario that best matches your needs.
Optionally, move columns to and from the "Available" and "Selected" columns based on your personal preferences.



Step 3 – Save changes

Click ***Save and Return.***