ATS Resourcing Tool
User Guide

http://iag.aig.net/ats/main/login.aspx

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Modified By	Umair Zaeem

Access to the Audit Time System (**ATS**) is granted to all employees of the Internal Audit Group. Timesheets are weekly reflections of hours for audits, time off or other audit activities. The date of the timesheet will be reflected by a from-to date starting with Monday and ending with the following Sunday. *Please note, ATS Timesheets are due EOD Friday*
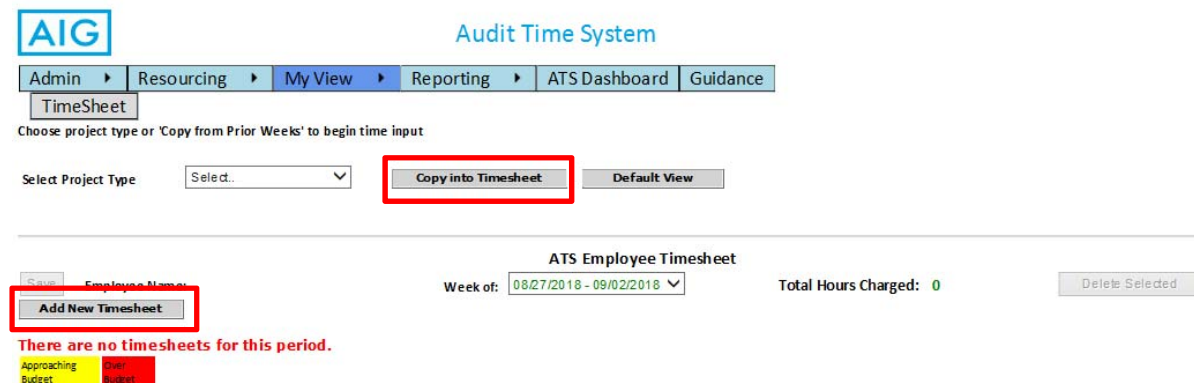
The following link will guide you to ATS
http://iag.aig.net/ats/main/login.aspx

Alternatively, you can access via the Internal Audit Group on SharePoint
https://share.connect.aig/teams/IAG/default.aspx
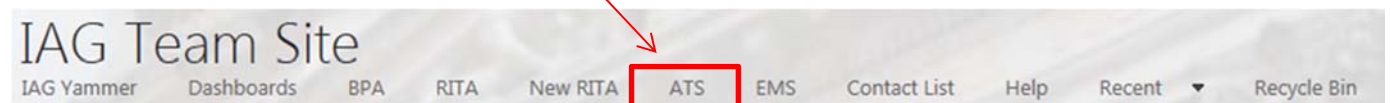
To begin; you can start a new timesheet, or can select Copy into Timesheet to copy the prior week's timesheet records into the current period. This is helpful because most auditors work on the same projects for several weeks.

Othewise, click Add New Timesheet > Select Project Type > Audit (to load audits from the plan).

As shown below; use the Filter by Segment, Functioning MD, Functioning Lead, IT MD, IT Lead, Actuarial MD or Actuarial Lead to find audits from the plan. Filter by all or any combination of these
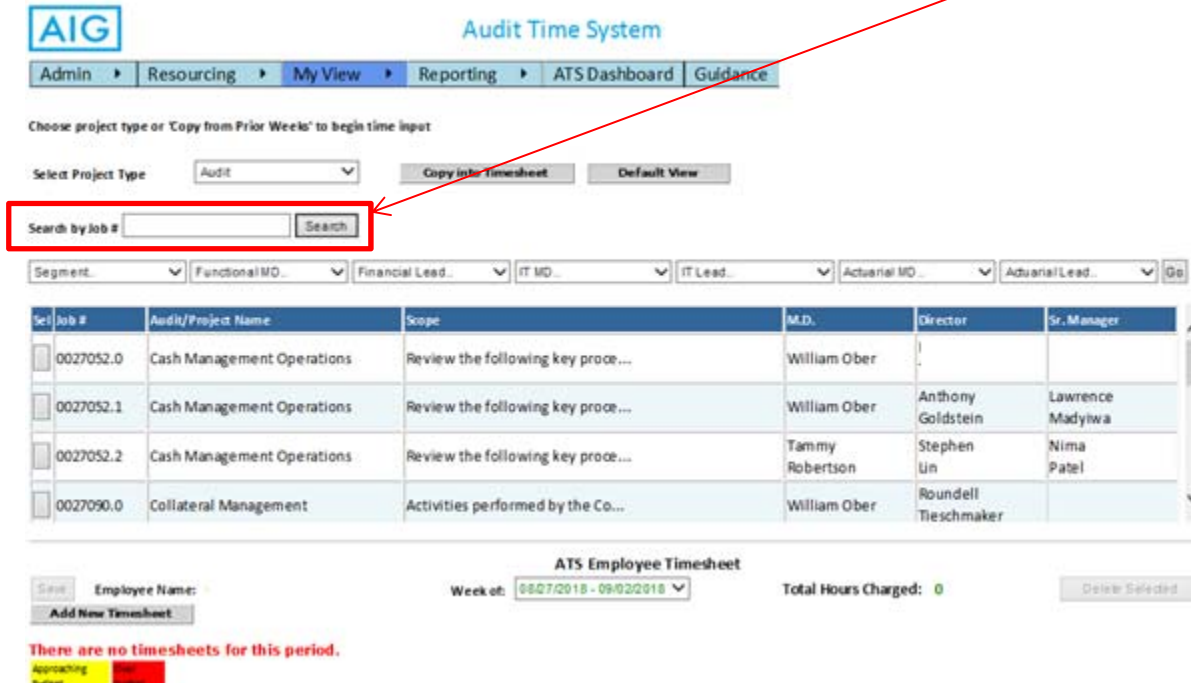
fields to find your audit.

Once selected click Go **.**

If you know the audit number, Search by it in the Search by Job# field and select Search

After, a running list will apear depending on how you have searched for the audit. Once that is done, select a job from job list. The selected job adds an entry line in the new timesheet.

To load the correct Category, go directly into the line item and choose a category

from the drop down and add hours (Hrs) worked to each project selected (this can be changed at any time). You can then continue to add Jobs by project type in this manner until the Weekly Timesheet is complete.

Once the timesheet entries are complete, select Save **. Total Hours Charged will also be reflected once saved. You also have the option of also deleting any selected. Simply select the line item you want to delete and click** Delete Selected

You can also select to Copy into Timesheet. This allows you to copy the previous week's record. From the Deafault View > select > Copy into Timesheet
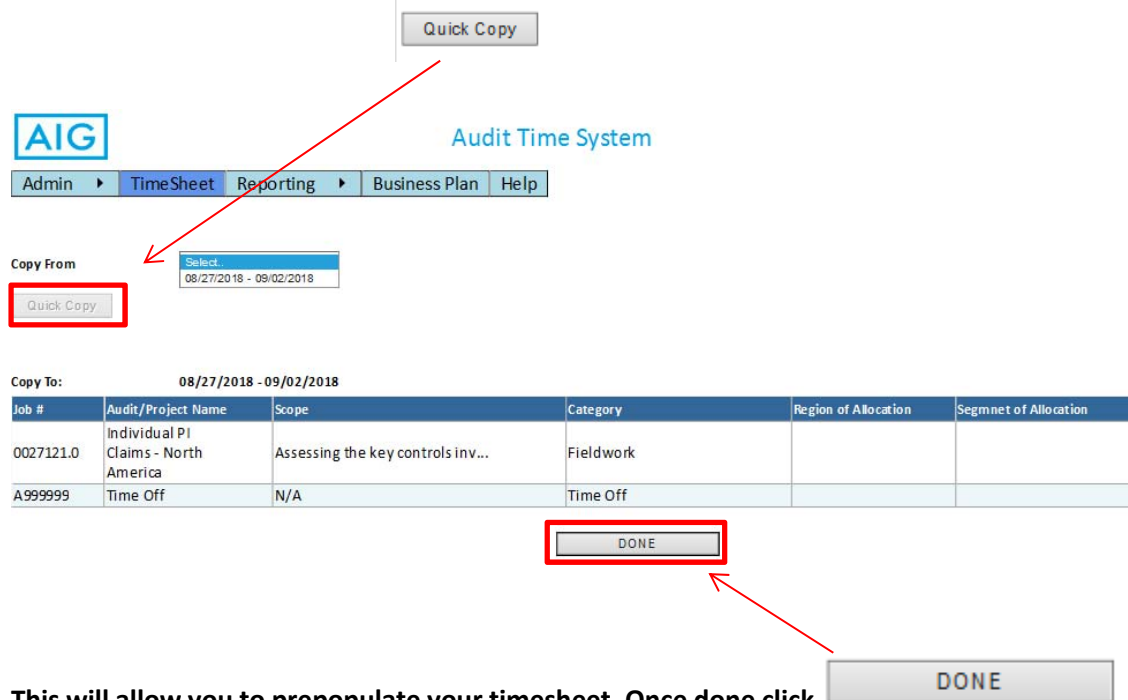
A Copy From drop down box opens and you can include ALL items from the prior timesheet by selecting the desired time range and clicking

This will allow you to prepopulate your timesheet. Once done click

IMPORTANT THINGS TO NOTE:

- There is no limit in the number of hours that can be coded to any one timesheet or any one line-item.
- There is no limit in the number of line items in a weekly timesheet.
- Use the <Week of> drop down to see prior week timesheets
- Use <Copy into Timesheet> to copy line items from prior timesheets into a new one.
- Use <Default View> to navigate back to the default view of the last saved timesheet.
- Always use the <SAVE> button to save changes made to timesheets.
- There is no timesheet approval process.
- Timesheet admin is available to everyone under the [Admin] main menu item
- Managers and above will be able to view/edit timesheets of their direct reports.
- Everyone will be able to view all timesheets under [Admin]

Section 1: Initiating and Staffing Audits

As part of the development of the resourcing tool, the work flow for initiating and activating the audits has slightly changed. Please refer to the below workflow for initiating audits.

1.1 – Pre-Planning

1.1.1 Initiating Pre-Planning

This phase can be initiated by the Parent Managing Director by adding a pre-planning date for an inventory item within BPA. The pre-planning date triggers the plan item to be available within the ATS resourcing tool and also becomes available within the ATS Timesheet for resources to book time to. Without a pre-planning date, resources will not be able to book time to an inventory audit anymore.

See below: Once the Pre-Planning date is entered in BPA as below, the audit will become available within the resourcing tool under 'Resourcing' 'Audit View' 'Pre Planning Audits'

1.1.2 Entering Expected Start Date and Staffing

The Parent/ Child Director can input the expected start date in the ATS resourcing tool and staff the audit based on the resourcing required for the audit. Please note that it isn't mandatory select specific names, open positions can be created with relevant hours. This feature can be used by management teams for future planning of audits (360 days).

*Click on the box in the **Select** column and the Resource Scheduler screen will open up. The bottom section will display a grid with the staff assigned to the audits and associated hours. If no staff is scheduled then the bottom grid will not appear. To staff audits, select the parent or child audit under the Parent/Child Audits List.*

*Click "**Add Resources**" and a pop-up screen will appear. Resources can be searched by name or by Grade. Please note the search is limited only to staff within the specific MD/Director's SMD reporting line; if a specific grade staff is not available, an open position can be created by selecting "**OpenPosition**", "**Grade**" and preferred "**Location**". The resourcing coordinator can assist in identifying a staff for that open positon. After selecting the resource, click 'Add' and the resource will appear in the staffing grid.*

*Once resource has been added, enter the allocated hours on a daily basis and click-> **Save.** If the screen is exited without hitting save, no changes will be saved. After hitting save, a message at the bottom of the staffing grid will appear "**Resource Scheduler details updated successfully !!**" as confirmation. Please note that up to 8 hours can be entered for a given day. This has been done to accommodate locations that have 8 hour workdays (for example Houston). Users should only enter projected hours based on standard hours of their specific location.*

The hours displayed above the entry box show the available hours for that particular resource for the selected audit. The available hours are calculated net of any other hours that resource may be staffed to (e.g. other audits, CM, PTO

	EmployeeName	Grade	Location	Total Hours	Thu 8-23	Fri 8-24	Mon 8-27	Tue 8-28	Wed 8-29	Thu 8-30						
Delete	Strogach, Elaine	Grade 24	New York, NY	10	5	5	5	5	5	5	5	6	6	6	6	6	7
					5.0	5.0	0.0										

Resource Scheduler details updated successfully !!

If more than the standard hours or available hours are entered, an error message will appear in red and the hours will not be saved (see below).

Save	Add Resources	Please correct the hours entered.									
	EmployeeName	Grade	Location	Total Hours	Thu 8-23	Fri 8-24	Mon 8-27	Tue 8-28	Wed 8-29	Thu 8-30	Fri 8-31	Mon 9-3
Delete	Kuang, Brenda	Grade 16	New York, NY	49	7	7	7	7	7	7	7	7
					10	7.0	7.0	7.0	7.0	7.0	7.0	0.0

1.2 – Activating Audits

1.2.1 Re-confirm Expected Start Date, Finalize Staffing and Submit for MD Approval
Once pre-planning has concluded, the Parent Director should review the Expected Start Date (and update if needed), review the staffing (and update if needed) and hit submit to send to Parent Managing Director for review and approval. The Parent Managing Director review and approves the staffing.

*Parent Director/ SM can submit the resourcing to the MD for approval by clicking on the **'Submit Resourcing'** button. An automated notification will be generated to the MD.*

Hi Sumukh Shah,

Audit - 27043 has been Staffed and Submitted for your Approval.

To View the Audit : Click Here

Request you to kindly check and approve the same.

Thanks & Regards,
IAG Team

SMD Approval
After the Parent Managing Director approves the staffing in ATS, the 'Activate' button in BPA becomes available for the SMD. The SMD can review (including the breakdown of staffing and total hours within BPA) and approve the audit and staffing by clicking 'Activate' in BPA.
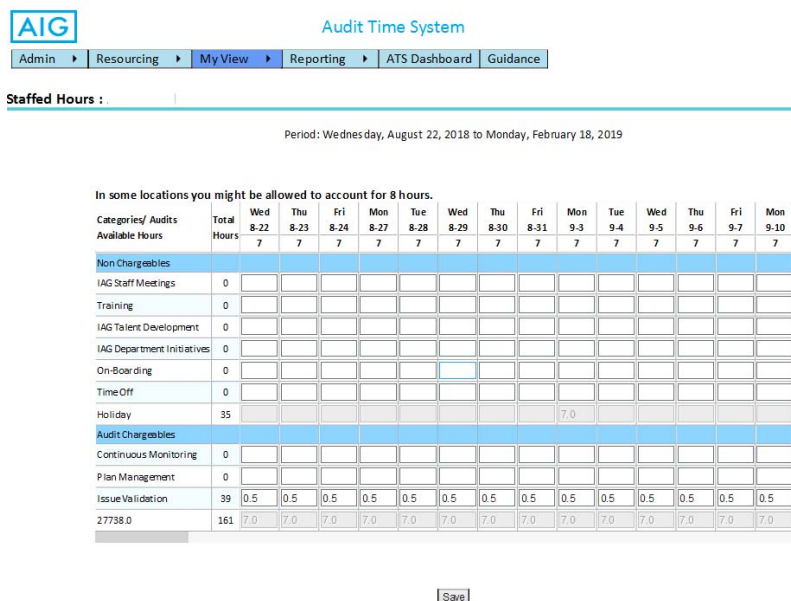
Section 2 – Resource View

The **Resource View** provides users a breakdown of individual schedules. This section can be used to view an individual's staffing and update staffing for Continuous Monitoring and Plan Management. When accessing your own schedule, you can access through 'My View' as well.

Click on: ***Resourcing -> Resource View***
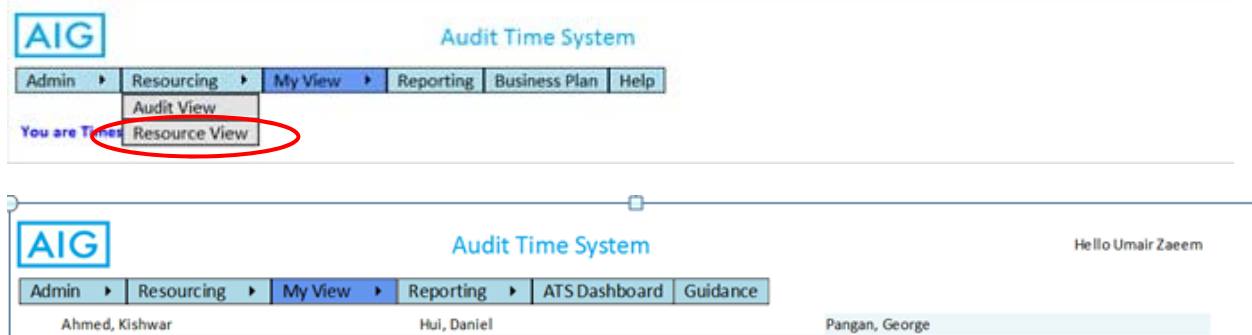
After clicking on a specific resource, that resource's entire schedule will appear (see below). This is a complete view of what that staff is scheduled on, including audits.

Non-chargeable Hours: Resources can project their hours for all non-chargeable codes with the exception of 'Time-Off' and 'Holiday' (exceptions exist for PTO time only for locations that are not using workday). The Time-off hours are a direct weekly feed of approved PTO from Workday. The public holiday schedule is also maintained offline and updated directly into the system based on local holiday schedules.

Audit Chargeable Hours: Grades 22 - 24 have the ability to staff themselves on Continuous Monitoring and Plan Management and can staff other resources (Grade 21 and below) within their SMD reporting line to Continuous Monitoring and Plan Management. All grades can staff themselves to issue validation. The audit staffed hours are directly pulled from the audit view based on what audits the resource is assigned to.

Section 3 – General guidelines for entering hours:

Audits View:
- **Allocating staff hours between audits:** When allocating resource hours by day between multiple audits for a given week, judgment can be used to divide the hours between days as long as total hours for the specific week tie to the specific audits.
- **Actual Hours:** Actual hours entered in ATS should reflect the actual number of hours the resource works regardless of the projection. Since the projections are based on standard hours, there can be instances where the resource works more than the standard hours for the day. In which case the actual hours spent should be logged into the ATS timesheet.
- **Changes to projections after Activating Audits:** The resourcing schedule for an audit is locked for editing after the activation of the audit. All changes to projections after activation will need to be managed centrally through the Ops team (see contact information below)

Resource View:
- **Non-chargeable Hours (excl PTO/Hol) /Continuous Monitoring / Plan Management / Issue Validation:** Teams can exercise judgment when forecasting the hours for the non-Audit codes
- **PTO Hours:** PTO hours are sourced from workday. The resource has the responsibility to ensure the PTO's are approved by managers in order to avoid getting scheduled to audits during PTO hours.
- **Keeping the Schedule current:** All resources are responsible for keeping their schedules current for all codes. So for example if a resource leaves an audit a week earlier than projected, the resource should notify the audit director/ senior manager or the Ops team contacts to update the schedule. As a good practice, the resources should make sure that their individual schedules are current for at least 90 days.

Ops Team Contacts:
If you have any questions, please reach out to the Ops Team:
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