Local Department Administrator
Project Tracking

INTRODUCTION

This document shows a Local Department Administrator for Project Tracking how to set up projects and assigned employees within the Project Tracking web application.

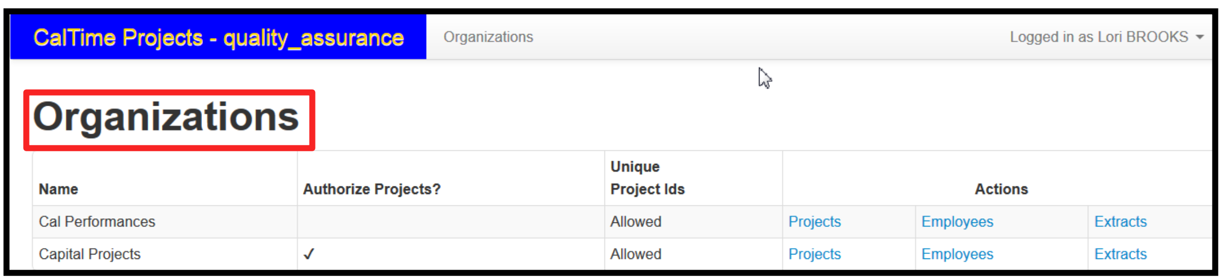
The Project Tracking web application works in conjunction with HCM and CalTime to provide a report of hours worked by employees on various projects.

SYSTEMS OVERVIEW

The Project Tracking web application receives a daily list of employees from HCM. CalTime captures hours worked for projects when the employee uses the “Project Tracking” pay code in CalTime and then chooses the appropriate project for the hours worked. The Project Tracking app also interfaces with CalTime to obtain summary hours for its extracts, pulling the data from CalTime on a daily basis.

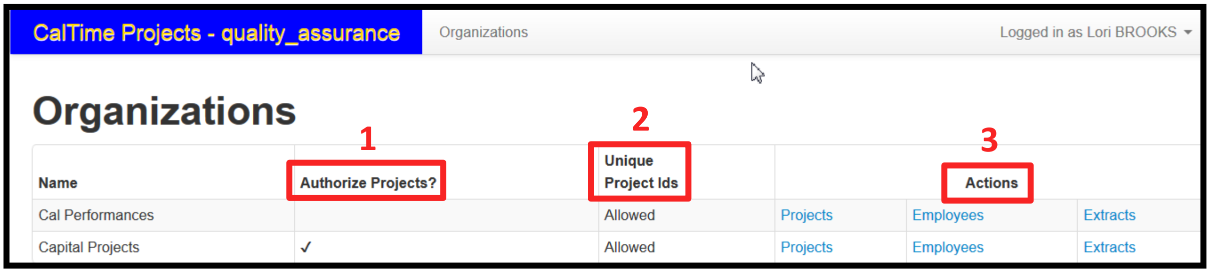
INTRODUCTION TO THE PROJECT TRACKING WEB APPLICATION

When you log in to the CalTime Project Tracking web app via https://caltime-project-tracking.berkeley.edu/, you see the names of the **Organizations** you are set up to administer.



Name	Authorize Projects?	Unique Project Ids	Actions		
Cal Performances		Allowed	Projects	Employees	Extracts
Capital Projects	✓	Allowed	Projects	Employees	Extracts

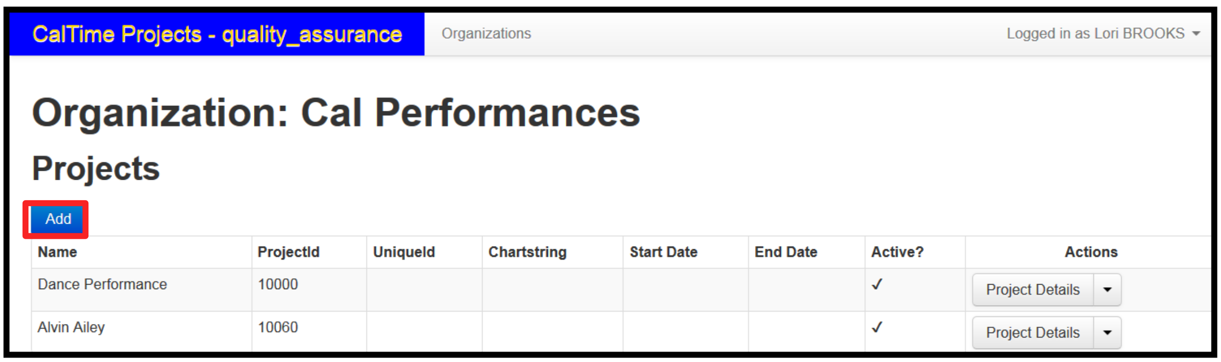
1. **Authorize Projects** indicates whether employees need to be manually assigned to a project by the Local Department Administrator or will be automatically assigned. If there is *no checkmark*, staff do not need to be authorized first and are automatically loaded from HCM and assigned to every project. A *checkmark* means employees have to be authorized and therefore manually entered.
2. **Unique Project IDs** can be used as another way to identify projects in addition to the project name. They can be configured by the Project Tracking system administrator to be *required*, *allowed*, or *not allowed*. A Unique Project ID ensures that the project has the same reference across systems (e.g., CalTime, Project Tracking web app, Access database, 3rd party project tracking software, etc.). The Project Tracking system does not allow duplicate Project IDs.
3. **Actions** can be performed on **Projects**, **Employees** or **Extracts**.



Adding a project

By clicking on the **Projects** link under **Actions**, you are brought to a list of your projects.

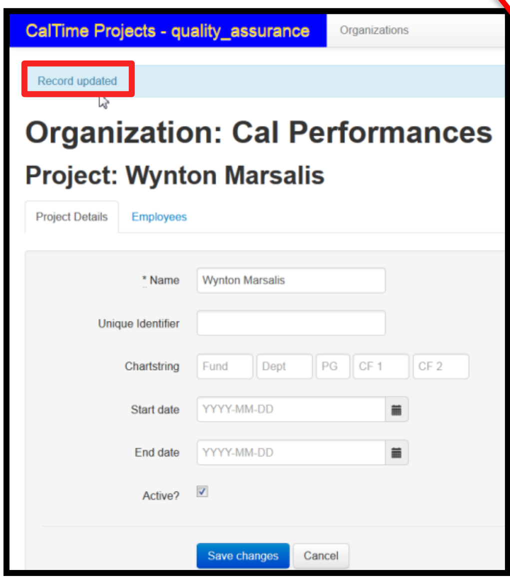
Click the **Add** button to add a new project to your list.



1. The only required field when adding a **New Project** is the **Name** field. The **Unique Identifier** field is visible only if **Unique Project IDs** are set to *allowed* or *required*. The **Chartstring** *does not* feed to PPS.
2. The **Start date** and **End date** fields can be used to set a fixed start and end of the project.
3. The **Active?** checkbox indicates whether the project is active or not. Users can only change time to an **Active** project.
4. Click the **Save changes** button when done.

There are two ways to **Activate** a project:

- Give it a start and end date.
- Click the **Activate** checkbox.

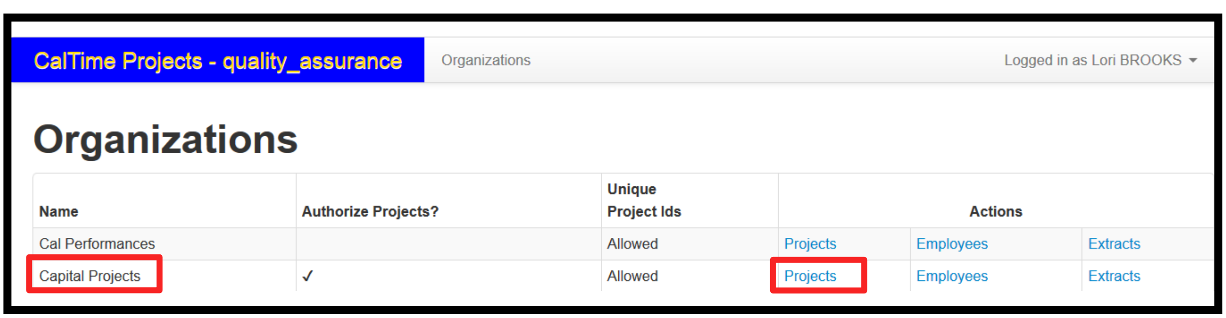


NOTE: The **Save changes** button does NOT go away after saving.

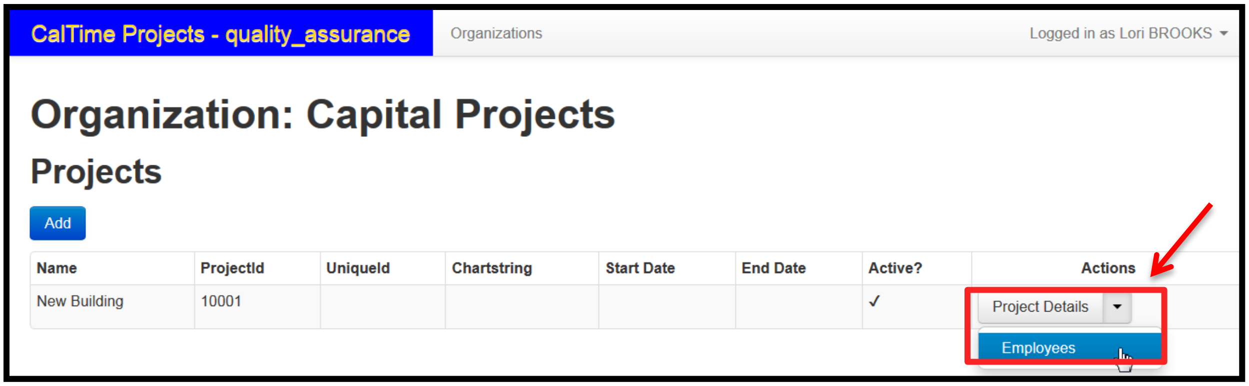
NOTE: A confirmation message appears to indicate **Record saved**, or **Record updated** if you have made changes.

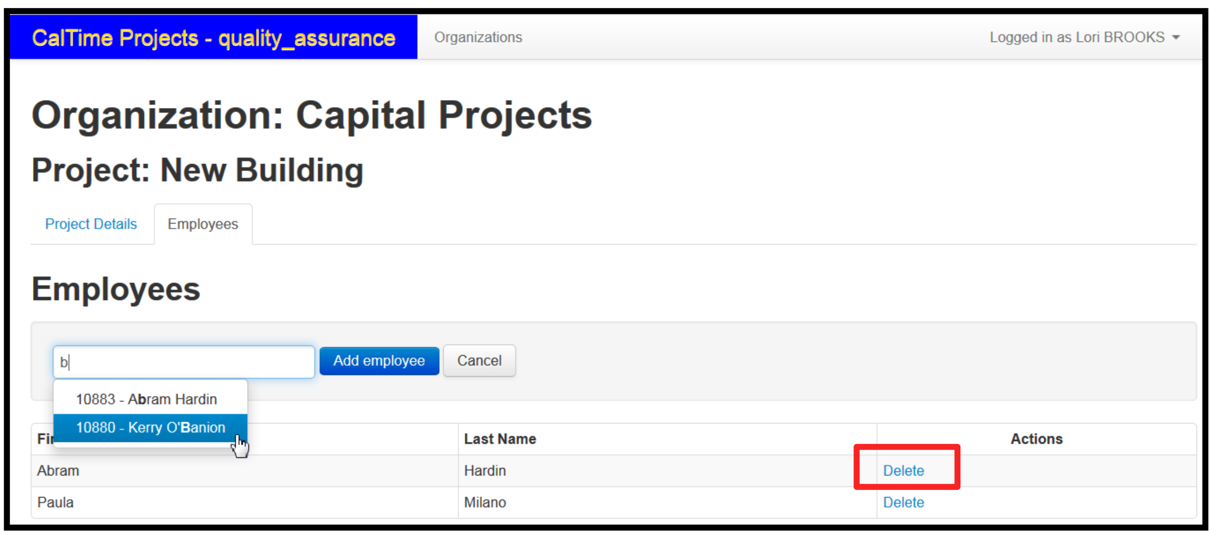
How to add or delete employees

When a project is set up to require authorization, you can manually add or delete employees. Whether or not authorization is required is reflected with a checkmark in the **Authorize Projects?** column. For *Capital Projects* below, clicking on **Projects** takes you to the area where you add or delete employees.

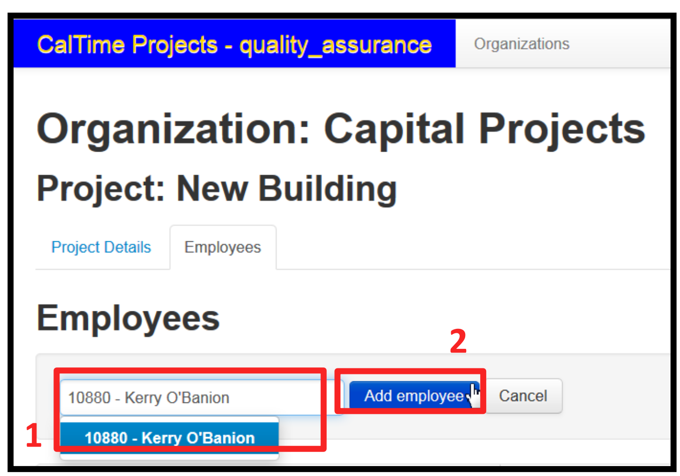


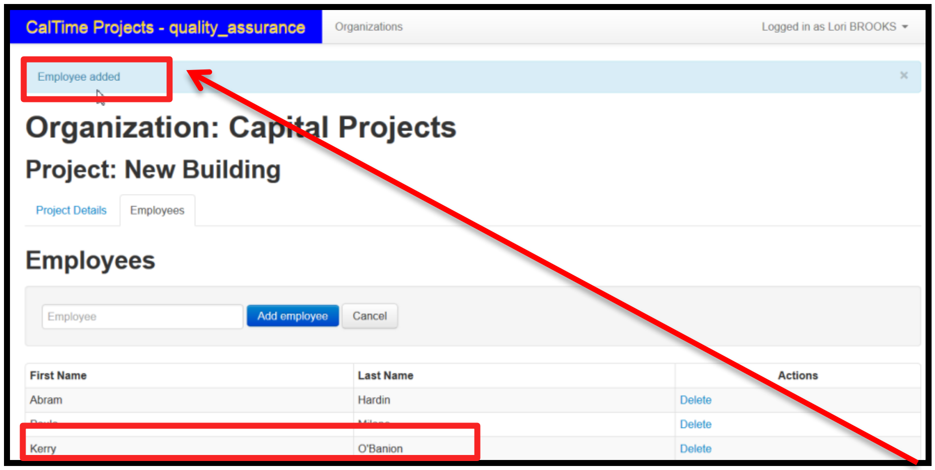
After clicking on **Projects**, you see your list of projects. In the **Actions** column, click on the **Project Details** drop-down and click on **Employees**.





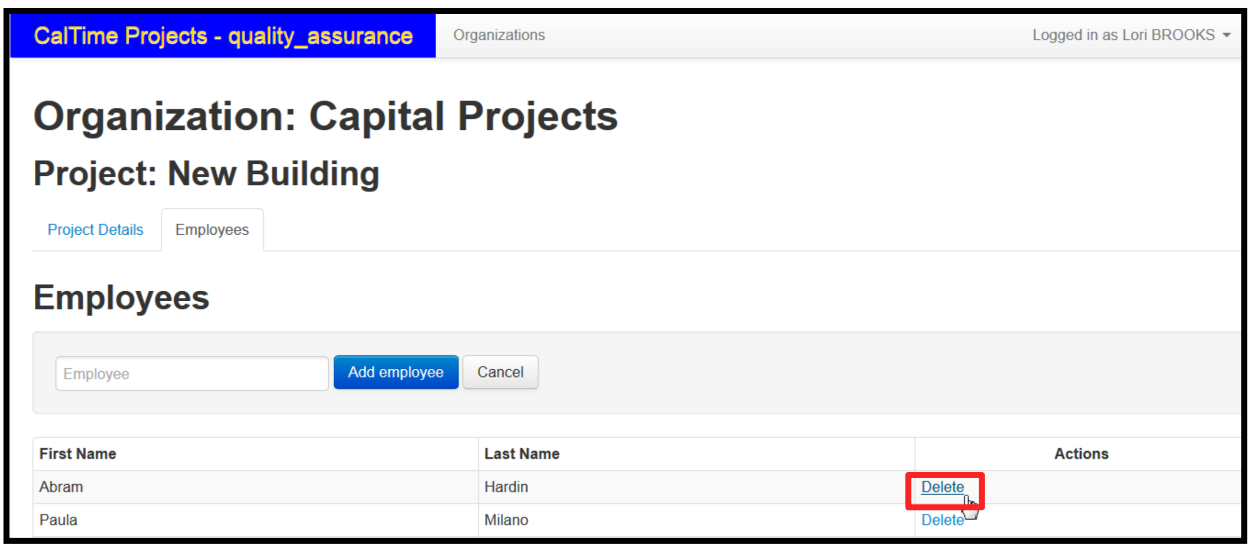
1. To add an employee to a project, start typing in the name of the employee to the left of the **Add employee** button. The name field populates based on what you type (e.g., type "b" and it will bring up any name that has a "b" in it). If there is a Department assigned to the project, and there are employees in that Department, names populate. Click to select the appropriate name.
2. Then click **Add employee**.



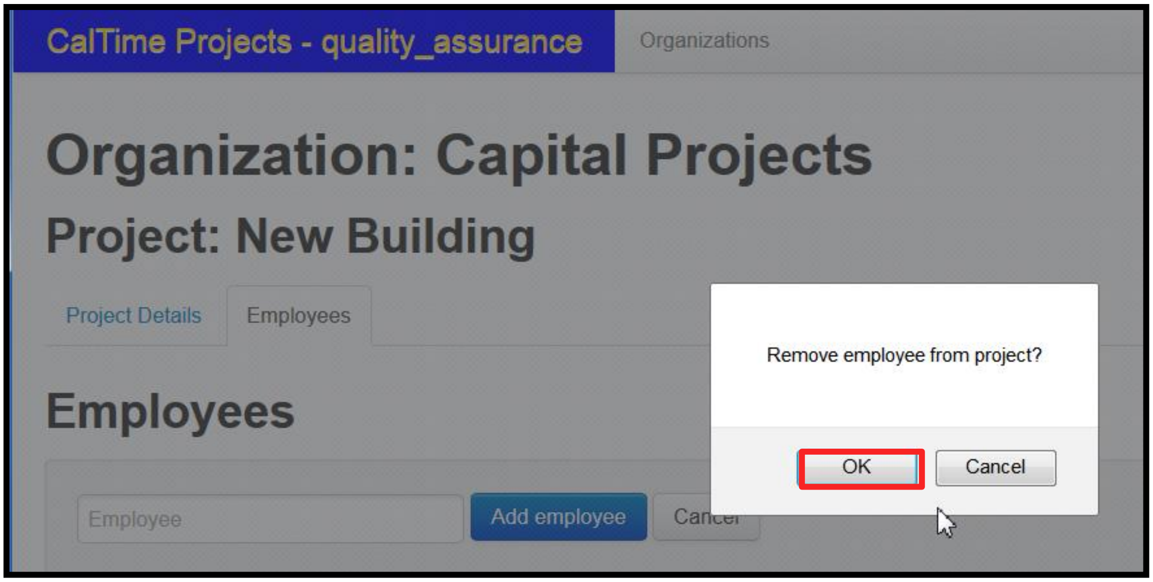


NOTE: A confirmation message appears when an employee was successfully added.

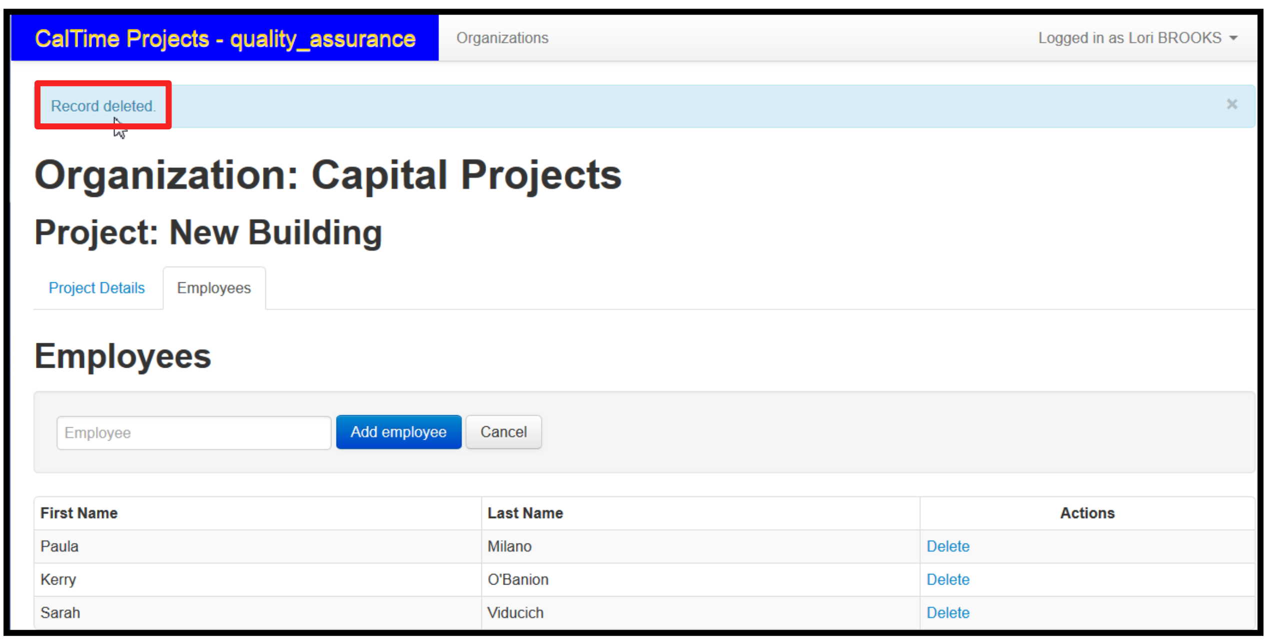
1. To delete an employee from a project, click **Delete** via the **Actions** column.



2. Click **OK.**

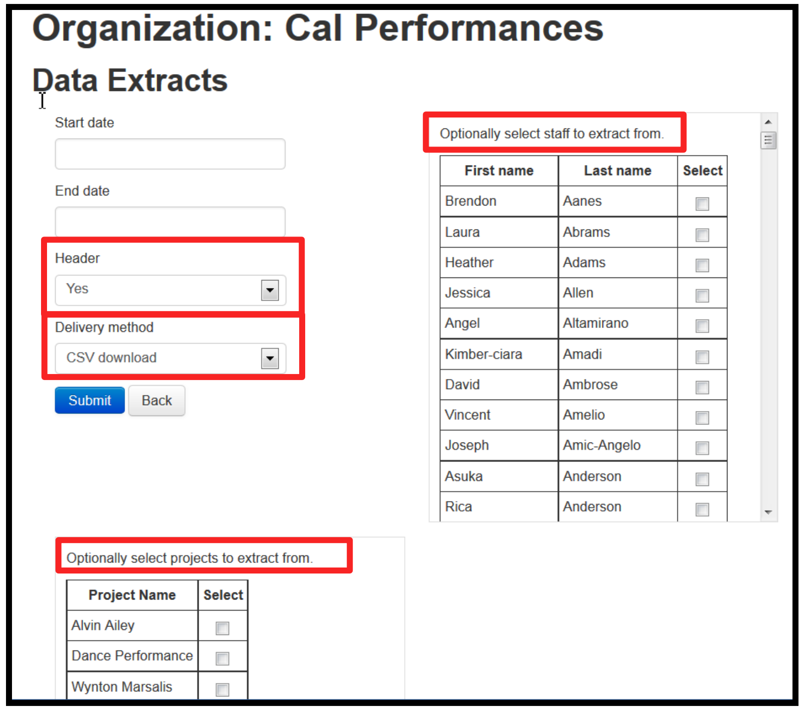


Confirmation of the deletion is below the Project name:

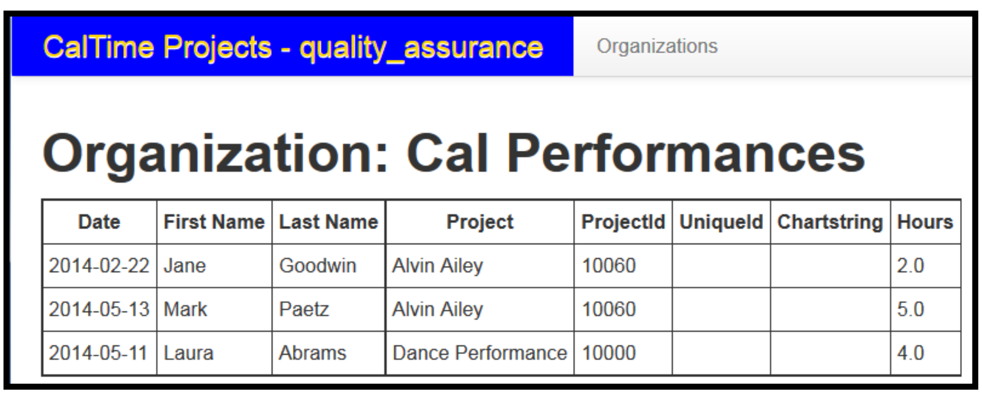


Reporting from the project tracking web app

Extracts allow you to export data from project(s). You can export by name of employee, by project(s), by date, or any combination. By default **Header** is set to **Yes**, and the **Delivery method** is set to **CSV download**. You may change these by using the drop-down for each. You can optionally select staff and/or projects to extract from.



Here is an example of an extract for multiple employees:



Organization: Cal Performances

Date	First Name	Last Name	Project	ProjectId	UniqueId	Chartstring	Hours
2014-02-22	Jane	Goodwin	Alvin Ailey	10060			2.0
2014-05-13	Mark	Paetz	Alvin Ailey	10060			5.0
2014-05-11	Laura	Abrams	Dance Performance	10000			4.0

GETTING HELP

If you need help, or need to add a Local Department Administrator to your project(s), please email caltime@berkeley.edu.