Reporting Progress and Time

Introduction to Updating Progress on Work in Clarizen
Reporting Progress: Two Approaches

Update Progress

Progress Fields

- 3 Progress Fields
  - % Complete
  - Actual Effort
  - Remaining Effort

Email

Report Time

Timesheets

- Manual Entry
- Stopwatch
Simple Progress Reporting w/o Timesheets: Update Effort

Click into the % Complete field and update the amount of progress.

The entry will calculate updates to the Actual Effort and Remaining Effort automatically.

The progress will be reflected and rolled up to Parent Work Items.

Direct entry into the Actual Effort or Remaining Effort fields will work in the same way.
% Complete Field Format Options

When working with Views, there are several options for how % complete is displayed

1. From the column header pull the ▼ to access the Filter and Format Options
2. The pop-up window will enable Sort, Filter, and Format Options. The current format will be shown as a blue hyperlink (In this case “Bar”)
3. Click the hyperlink to access the Format options. Here you will find the 4 options for displaying % Complete
   • Done Toggle – a simple way to indicate if task is complete
   • Full percentage values (do not show ’0’) – numerical % complete with ’0’ in cells with no progress
   • Full percentage values (show ’0’) – numerical % complete with null cells where no progress
   • Bar – a nice graphical depiction of % complete along with the number
4. Conditional Formatting can also be applied to change the appearance of data based on rules (this will be covered elsewhere in the course)
Individual vs Shared Progress Reporting

When assigning work items to multiple resources, you have the option of selecting the progress reporting policy as either Shared or Individual.

Shared is an easier method since only one update is required. Individual, however, will give a more granular and detailed accounting of the progress that has been completed.

To set the policy, access the “Task Completion Reporting Policy” either at the Organization Level in the System Settings to set the default (must be done by an admin), or in a work item’s Property Card by managers of that work item.
Reporting Progress via Timesheets

Timesheets can be used as a detailed approach to keeping track of all work that resources perform.

Timesheet submissions will inform the “Actual Effort” for reported Work Items and update the project plan accordingly.

Some organizations require a Manager to approve submitted time before it is recognized and reflected in the Project plan.
Setting Work As “Reportable”

Before a Work Item can have time logged against it, it must be marked as “Reportable” in the Properties card.

- Set the Work Item as Reportable
- Decide if time will be reported at that level or at lower levels and rolled up (if sub-items exist)
- Check the toggle field if you would like Actual Effort to be updated from Timesheets
3 Ways to Report Time From the Work Plan

From the “Common” Ribbon Menu, choose “Report Time”

From the “Add Related” Ribbon Menu, choose “Time Entries”

From the “Utilities” Ribbon Menu, choose “Start Stopwatch”

The Stopwatch will time you while you work and upon completion open the “Add New Timesheet” window.
Accessing the Timesheets Module

Reportable Item Columns (Include any fields using the Gear)

Days of the Week

Legend

- 4 h • Approved Time
- 2 h (Pending Approval)
- 4 h • Unsubmitted Time
Adding Reportable Items

Use the “Add Reportable Item” option to account for time that was spent on work that is not being tracked in Clarizen.

This is helpful in organizations using Clarizen as their primary time tracking system and all resources must account for 40 hours per week.

Clearer visibility than you ever had so you can move faster than you ever could.