Division Of TECHNOLOGY & INNOVATION
CHANNEL ISLANDS
California State University

Process Number:	BP.00.009.02	**Effective Date:**	21-February-2011
Approved By:	A. Michael Berman VP for Technology & Innovation		

Business Practice for Tracking Time on Task

PURPOSE:

To provide for a uniform process for how Division of Technology & Innovation (T&I) staff keep track of time spent on project, cost-recovery and operations support work activities.

BACKGROUND:

T&I must be able to make strategic decisions about how it uses the limited resources that it has available. In addition, the Division must be able to openly communicate about these decisions with the University community. Strategic decision making is best performed with actual data regarding utilization of those resources. Therefore, T&I must keep accurate track of where and how employee time is spent on projects for resource analysis and planning. In addition, certain activities performed by T&I are subject to cost recovery or capitalization – the time spent on these activities needs to be recorded accurately.

BUSINESS PRACTICE:

Accountability:

The VP for Technology & Innovation and T&I managers

Applicability:

All T&I employees

Definitions:

(1) **Project**. A temporary endeavor undertaken to create or update a unique product, service, or result that requires 30 or more hours of total T&I staff time to complete, as described in BP-00-005 Business Practice on Project Intake
(2) **Operations**. Steady-state T&I activities used to support existing products and services. They are repetitive, with the same outcomes, and are ongoing, with no start or end dates.
(3) **Project Management Office (PMO)**. The T&I team responsible for the coordination, support and guidance of T&I projects.

Text:

To aid T&I in its ability to strategically plan how its limited resources are used, all T&I staff must keep track of time spent on all project-related activities in an Activity Report.

Each staff member is responsible for the accuracy and maintenance of their own Activity Report, and must provide the Report to their T&I manager in a timely manner.

T&I managers are responsible for:
1. ensuring that staff whom they supervise maintain their Activity Reports;
2. providing their direct reports with an up-to-date list of cost-recovery activities;
3. rolling-up Activity Report statistics as requested by the VP for Technology & Innovation; and
4. providing project-related data to VP for Technology & Innovation and the PMO as requested.

Activity Report Detail

Each staff member's Activity Report shall contain:
1. All tasks performed by the staff member in support of approved T&I projects; and
2. All tasks performed by the staff member as part of cost-recovery activities

The list of approved T&I projects is available in the T&I Project Repository (see Exhibits). A list of cost-recovery activities is available from the VP for Technology & Innovation.

Examples of tasks include but are not limited to: attend or lead a meeting; send an email to or call a client; configure server; install a computer or network connection; configure or install software; re-write code or module; participate in a conference call; perform product research; work on project plan or schedule.

For each task in the Activity Report, the T&I staff member must provide the minimum following information:

- Date the task was performed;
- The name of the project (or cost-recovery activity) for which the task was performed;
- A brief and meaningful description of the task (between 3 and 50 words)
- The amount of time spent on the task, rounded to the nearest 15 minute interval (minimum 15 minutes).

In addition, it is recommended that each task be categorized into one of the following Task Categories:

- Install/Configure
- Modification/Repair
- General/Other
- Coding/Programming
- Meetings
- Planning
- Research

T&I management shall select and implement a recommended tool to facilitate the data gathering process and report generation.

Activity Report Frequency

At minimum, each T&I staff member shall update their Activity Report weekly. Each T&I manager may request that the employees under their supervision provide data about their activities at any time (i.e., on-demand), or increase the frequency as needed. Therefore it is recommended that all T&I staff update their Activity Reports on a daily basis, to improve accuracy and facilitate creation of both weekly and on-demand reports.

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Operations Reporting

T&I employees may keep track of time spent on operations support tasks (i.e., work-related tasks which are not related to a project or cost-recovery activity) at their discretion or as designated by their supervisor.

Each T&I manager has the discretion to require any employee under their supervision to keep track of all of their daily work-related activities (including operations support tasks), and be able to report on them daily. This may be necessary when more detailed evaluation of any employee's daily activities is required to address capacity, resource usage or planning issues.

Planning Reports

The resulting data shall be used to report regularly on the following statistics:

- Hours Spent per project
  - Hours spent per project, grouped by task category
  - Hours spent per project, grouped by employee
- Comparison of actual project hours to estimated project hours
- Hours spent per cost-recovery activity
  - Hours spent per cost-recovery activity, grouped by employee
  - Hours spent per cost-recovery activity, grouped by task category
- Comparison of actual cost-recovery hours to estimated cost-recovery hours
- Hours Spent by employee, grouped by Project and/or Task Category

T&I management may use the resulting data to generate other reports at its discretion, in accordance with applicable laws and University policies.

Exhibits

T&I Project Repository: http://sharepoint/sites/its/SiteDirectory/ait-projects

Assessment Requirements

Assessment requirements and history are listed in the grid below.

Description	**Frequency**	**Role Assigned**
Review of business practice	Annual	Director of IT Strategy
Report on usage and compliance with business practice	Bi-annual	Director of IT Strategy

Revision History

BP Nbr:	BP-00-009	**Enacted Date:**	02/21/2011		
Revision Nbr:	001	**Revision Date:**	11/13/2012	**Revised By:**	NFisch
	002		02/02/2017		NFisch