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Resource Management | Best Practice

Your Guides: Michael Meyers Karl Lockwood Mary Lichtenauer

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself





Agenda

- Typical RM Process Flow
- The 4 A's of RM:
 - Availability
 - Allocation
 - Assignment
 - Actuals
- Use of Smart Notifications
- Applying Adoption Metrics

Typical Process For Resource Management



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4 A's Of Resource Management

Availability	The hours per day available for project work. This is guided by a resource's calendar. This is typically 40 hours a week.
Allocation	A percentage of a project team member's time, which is converted into hours planned for the use of a resource or role on a Project. The Resource Manager is responsible for allocation of resources.
Assignments	The estimated hours of work effort allotted to each resource or role on a Task. The Project Manager is responsible for all assignments (ETC).
Actuals	The hours worked on a Task entered by resources in CA PPM timesheets which have been approved and Posted.

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What's important to You?

- Project Managers:
 - Do I have the necessary resources to complete the work on time?
- Resource Managers:
 - How do I manage the multiple demands on my resource's time?

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Calendars



- How does your organization track vacation time?
- As a project manager, how often are you surprised by a resource going on vacation?
- Within your organization, does the resource manager approve/manage when vacation is taken?

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Data Source Conversions

CA PPM uses the values in the BASE Calendar to execute conversions to FTE, Days, Months.

- Base Calendar is defaulted to 8 hours per day
- 8 hours is the denominator in the conversion, unless changed in the base calendar
- Examples:
 - FTE is determined by the amount of allocated hours (4 hours) divided by the base calendar hours (8 hours):
 - 4hrs/8hrs = .5 FTE needed to complete the work
 - Days are calculated by total hours (24hrs) divided by base calendar hours (8hrs):
 - 24 hrs/8hrs = 3days of work

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Resource Availability

Resource > *Properties*: Default Availability is set to 8hrs per day

Properties 🔻	Skills	Allocations	Document Manager	Calendar		
Resource-Labor:	Brian G	Gallinger - <i>Mai</i>	n - General			
General						
▲ Last Na	ame Ga	llinger		*Resource ID	bgallinger	
★ First Na	ame Bri	an		Email Address	bgallinger@ppcg.net	
Resource Manageme	ent					
Primary R	Role Te	chnical Architect	© H	Resource Manager	Reynolds, Clayton	0 H
Categ	ory			Booking Manager		ΘĦ
Date of H	Hire 12/	26/2011 🏢		Employment Type	Contractor	
Date of Terminat	tion			External		
★ Availab	oility 8.0	0				
Organizational Break	down Str	ructures				
Organizat	tion /AI	Lines of Business/	Product Development	⊙H		
Resource O	BS /AI	Employees/Service	s	0 H		
Departm	ent /Co	mpany/Technical		0 H		
Save Save A	nd Retur	n Return]			[N

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Availability Is Managed By The Calendar

Resource Record > Calendar:

- Use of the Calendar in CA PPM allows for direct updates to allocations and availability
- Thru the use of custom portlets and reports, the planned time off can be made available to Project Managers and Resource Managers

Resource-Labor: Joe Alme	eida - <i>Edit Resource Calen</i>	dar													
Base Calendar United States	H Save														
C March ▼ 2016 ▼	March ▼ 2016 ▼														
To specify the same week day in the	entire calendar, check a day of the we	eek. To specify an individual day, check	a date in the month.												
Sun Mon Tue Wed Thu Fri Sat															
		1 🗖	2 🗖	3 🗖	4 🔲	5 🔲									
6 🗖	7 🗆	8 🗖	9 🗖	10 🗆	11 🗖	12 🗖									
13 🗖	14 🔲	15 🔲	16 🔲	17 🔲	18 🔲	19 🗖									
20 🖵	21 🖵	22	23	24	25	26 🖵									
27 🗖	28 🔲	29 🔲	30 🔲	31 🗆											

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Project & Team Based Calendar Portlet Example



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Best Practice Suggestions

- When possible, use the CA PPM Calendars
 - Automatic Updating of resource availability
 - Removes all allocations for the specified periods
 - Can be used to drive communications within CA PPM to the Project and Resource Managers
- Add corporate holidays to the base calendar
 - In multi-national organizations, it is best to use multiple calendars to represent various holidays and work times (8hr day vs. 7hr day)

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Allocations



- CA PPM displays allocations in multiple places, but, it is up to the RM/PM to extract the data. How do you typically review allocations?
- What do you find is the most difficult piece in managing allocations?

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Project Team Views

- Team Allocations allocations define a window in which work can be performed
- It is not an estimate of the work

Team Tasks Financial Plans Risks/Issues/Decision Log Chargebacks Processes Hierarchy Audit Trail Dashboard Collaboration PM Views Reso ject: RS Allocation Example - Team - Staff Scenario: [-Select-] Acti Acti Scenario: [-Select-] Acti Filter: System Default Project Role Booking Status Open for Time Start Finish Average Allocation % Allocation Actuals Q Arya, Vishal Business Analyst Hard 4/4/16 6/30/16 0.0% 0.00 0.
Filter: System Default Resource/Role Project Role Booking Status Open for Time Add/Update by OBS Project Role Booking Status Open for Time Save Add Project Role Booking Status Open for Time Start Filter: Filter: Project Role Booking Status Open for Time Start Filter: Project Role Booking Status Open for Time Start Filter: Project Role Booking Status Open for Time Start Filter: Booking Status Open for Time Start Filter: Booking Status Open for Time Start Filter: Start Booking Status Open for Time Start Project Role Soft Start S
Resource/Role Project Role Booking Status Open for Time Start Finish Average Allocation % Allocation Actuals Arya, Vishal Business Analyst Hard Image: Allocation in the start Image: Allocation in the start Image: Allocation in the start Allocation Actuals DBA DBA DBA DBA DBA Soft Image: Allocation in the start Soft Image: Allocation in the start Image: Allocation in the start Image: Allocation in the start Actuals Image: Arya, Vishal DBA DBA DBA Soft Image: Allocation in the start Soft Image: Allocation in the start Image: Allocation in the start Image: Allocation in the start Actuals Image: Allocation in the start DBA Image: Allocation in the start Soft Image: Allocation in the start Actuals Image: Allocation in the start DBA Image: Allocation in the start Soft Image: Allocation in the start Actuals Image: Allocation in the start Network Engineer Image: Allocation in the start Soft Image: Allocation in the star
Arya, Vishal Business Analyst Hard 4/4/16 6/30/16 0.0% 0.0% 0.00 DBA DBA DBA DBA Soft 5/9/16 6/10/16 100.0% 200.00 0.00 Network Engineer Network Engineer Soft 4/24/16 6/30/16 100.0% 392.00 0.00 Shapiro, Richard Project Manager Hard 3/7/16 6/30/16 100.0% 672.00 0.00 Save Add/Update by OBS C Remove Vertor Kenove Vertor Kenove Vertor Kenove 1/264.00 0.00
□□□□□□□□0.00□□□Network Engineer□□□0.01100.0%392.000.00□□□Network Engineer□□0.010.010.000.000.00□□Network Engineer□□0.010.010.000.000.00□□Network Engineer□□0.010.010.000.000.00□□□□□□□□0.000.000.000.00□□□□□□□□□□0.000.000.00□□□□□□□□□□□0.000.00□□□□□□□□□□□0.000.00□□□□□□□□□□□□0.00□□□□□□□□□□□□□□SaveAdd/Update by OBS♥Remove♥■■□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□
Network Engineer Network Engineer Soft 4/24/16 6/30/16 100.0% 392.00 0.00 Shapiro, Richard Project Manager Hard 3/7/16 6/30/16 100.0% 672.00 0.00 Total Total Image: Constraint of the second se
Image: Shapiro, Richard Image: Project Manager Hard Image: Manager Hard 3/7/16 6/30/16 100.0% 672.00 0.00 Total Image: Manager Image: Manage
Total 1,264.00 0.00 Team Capacity Save Add Add/Update by OBS Premove
Save Add Add/Update by OBS Team Capacity
Save Add Add/Update by OBS & Remove
0k 10 10 10 10 10 10 10 10 10 10 10 10 10

Resource Detail View

- Team Tab>*Detail*: Allocations displayed by Months (time-scaled view)
- Supports a better inline editing method for direct updates into the view

								3		Allocation	By Period		
	Resource/Role_		Project Role	Booking Status	Start	Finish	Allocation	Feb 16	Mar 16	Apr 16	May 16	Jun 16	Jul 16
	Q Arya, Vishal	2=	Business Analyst	Hard	4/4/16	6/30/16	0.00						
	Q DBA	2=	DBA	Soft	5/9/16	6/10/16	200.00				136.00	64.00	
	Q Network Engineer	2=	Network Engineer	Soft	4/24/16	6/30/16	392.00			40.00	176.00	176.00	
	Q Shapiro, Richard	2=	Project Manager	Hard	3/7/16	6/30/16	672.00		152.00	168.00	176.00	176.00	
Total							1,264.00		152.00	208.00	488.00	416.00	
												Displaying	1 - 4 of 4



Examples Of Using Time Scaled Entry

- Screen Shots of how Time Scaled Values can be used for direct Allocation Entry:
 - Month Level and Above recommended
 - Do not want to create too many allocation segments

													Allocation	By Period		
		Resource/Role -		Project Role	Booking Status	Start	Finish	Allocation	Actuals	ETC	Mar 16	Apr 16	May 16	Jun 16	Jul 16	Aug 16
	0	Almeida, Joe	2=	Architect	Soft	11/2/15	5/31/16	1,976.00	0.0	0.00	304.00	256.0	0 40.00			
	0	Berner, Andy	2=	Copywriter	Soft	11/2/15	5/31/16	1,196.00	0.0	0.00	184.00) 144.0	0 180.00			
	0	Dolak, Jerry	2=	Business Analyst	Soft	3/14/16	5/31/16	230.00	0.0	0.00	80.00)	150.00			
	0	Zwerin, Andrew	2=	Developer	Soft	11/2/15	5/31/16	1,216.00	0.0	0.00	184.00	168.0	0 176.00			
Total								4,618.00	0.0	0.00	752.00	568.0	0 546.00			
															Display	ing 4 A of 4
													\checkmark		Ad	ded a
											0		Allocation	3y Period	Ad M	ded a onth
		Resource/Role •		Project Role	Booking Status	Start	Finish	Allocation	Actuals	ETC	Mar 16	Apr 16	Allocation B May 16	3y Period Jun 16	Ada M Jul 16	ded a onth Aug 16
	Q	Resource/Role ▲ Almeida, Joe	<u>1</u> =	Project Role Architect	Booking Status	Start 11/2/15	Finish 5/31/16	Allocation 1,976.00	Actuals 0.00	ETC 0.00	Mar 16 304.00	Apr 16 256.00	Allocation B May 16 40.00	By Period Jun 16 200 —	Adu M Jul 16	ded a onth Aug 16
	QQ	Resource/Role - Almeida, Joe Berner, Andy	1= 1=	Project Role Architect Copywriter	Booking Status Soft Soft	Start 11/2/15 11/2/15	Finish 5/31/16 5/31/16	Allocation 1,976.00 1,196.00	Actuals 0.00 0.00	ETC 0.00 0.00	Mar 16 304.00 184.00	Apr 16 256.00 144.00	Allocation I May 16 40.00 180.00	By Period Jun 16 200 — 85 —	Add M Jul 16	ded a onth Aug 16
	000	Resource/Role - Almeida, Joe Berner, Andy Dolak, Jerry	2= 2= 2=	Project Role Architect Copywriter Business Analyst	Booking Status Soft Soft	Start 11/2/15 11/2/15 3/14/16	Finish 5/31/16 5/31/16 5/31/16	Allocation 1,976.00 1,196.00 230.00	Actuals 0.00 0.00 0.00	ETC 0.00 0.00 0.00	Mar 16 304.00 184.00 80.00	Apr 16 256.00 144.00	Allocation 8 May 16 40.00 180.00 150.00	By Period Jun 16 200	Adi M Jul 16	ded a onth Aug 16
	0000	Resource/Role - Almeida, Joe Berner, Andy Dolak, Jerry Zwerin, Andrew	2= 2= 2=	Project Role Architect Copywriter Business Analyst Developer	Booking Status Soft Soft Soft Soft	Start 11/2/15 11/2/15 3/14/16 11/2/15	Finish 5/31/16 5/31/16 5/31/16 5/31/16	Allocation 1,976.00 1,196.00 230.00 1,216.00	Actuals 0.00 0.00 0.00 0.00	ETC 0.00 0.00 0.00 0.00	Mar 16 304.00 184.00 80.00 184.00	Apr 16 256.00 144.00 168.00	Allocation I May 16 40.00 180.00 150.00 176.00	By Period Jun 16 200 85 67 88	Add M Jul 16	ded a onth Aug 16

(Red indicators show what has been changed)



Resource Allocation Detail View

• Individual Resource Allocations can also be displayed

Res	Resource-Labor: Juan Ayala - Resource/Role Allocations														
٥	Filter: System Default 🔻														
	Investment▲ Investment Booking Open for Allocation Average Allocation Actuals ETC														
	Interview														
	Image: A start of the star														
		Q,	JA Demo Project 1	Almeida, Joe	Network Engineer	Soft	 Image: A second s	8/6/15	12/31/15	100.0%	848.00	0.00	240.00		
		Q,	Jen - Child Project	Admin, Rego	Network Engineer	Soft	×	12/14/15	12/14/16	100.0%	2,104.00	0.00	0.00		
		0,	JS - Multi Year Project	Admin, Rego	Network Engineer	Soft	×	2/1/15	8/1/17	15.0%	782.40	0.00	0.00		
		Q,	RPC POC Review	Armstrong, Ken	Architect	Soft	 Image: A second s	1/28/15	11/16/15	100.0%	1,672.00	72.00	99.00		
		0,	timesheet test	Meyers, Michael	Network Engineer	Soft	×	11/2/15	12/31/16	100.0%	2,440.00	0.00	32.00		
		Q,	1A - Example Project ETCs	Admin, Rego	Network Engineer	Soft	 Image: A second s	11/20/15	12/31/16	15.0%	349.20	0.00	1,500.00		
		Q,	1A - Example Project Team Allocations	Admin, Rego	Network Engineer	Soft	 Image: A second s	11/20/15	12/31/16	80.0%	1,862.40	0.00	0.00		
		0,	2015 HP Enterprise Software	Ayala, Juan	Network Engineer	Soft	 Image: A second s	2/10/15	2/24/17	15.0%	640.80	613.00	408.00		
		0,	2015 Learning Portal Optimization	Peacock, Bob	Network Engineer	Soft	×	1/1/15	6/30/16	15.0%	469.20	759.00	0.00		
		0	2015 Software Implementation	Peacock, Bob	Network Engineer	Soft	 Image: A second s	1/12/15	2/17/17	15.0%	660.00	0.00	0.00		
Tota											17,844.00	1,444.00	2,279.00		
											Displa	aying 1 - 1	2 of 12		

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Resource Workloads

• CA PPM has the ability to compare a range of RM metrics on a single portlet

Workloads Capacity	Allocat	ions Booking Status	Unfilled Roles	Aggregation										
Resource Views: Work	loads										xii 💼 🙀 İ			
Resource Workloads														
Allocation D														
Resource		Resource ID	Primary	/ Role		Feb 16	Mar 16	Apr 16	May 16	Jun 16	Jul 16			
Almeida, Joe	<u>*</u> =	jalmeida			Availability Rate Allocation Actuals ETC	168 504	184 552	168 504	176 528	176 528	168 504			
Armstrong, Ken	<u>*</u> =	karmstrong	Architect		Availability Rate Allocation Actuals ETC	168 902	184 813	168 691	176 528	176 528	168 504			
Arya, Vishal	<u>*</u> =	varya	Business Analyst		Availability Rate Allocation Actuals ETC	184	184	168	176	176	168			
Ayala, Juan	<u>*</u> =	jayala	Network Engineer		Availability Rate Allocation Actuals ETC	168 605 33	184 662 31	168 501 25	176 458 26	176 458 26	168 412 25			
Benson, Bradley	<u>*</u> =	bbenson	Business Analyst		Availability Rate Allocation Actuals ETC	168 730 6	184 764	168 645	176 440	176 440	168 420			

Forecasted Utilization

• This portlet allows RMs to view future allocations by resource, month by month

	Work	kloads C	Capacity	AI	locations	Booking St	tatus	Unfilled Roles	Aggregation	Forcasted	Utilization								
Re	sou	rce Views	: Forcas	ted	Utilizatio	n												×	ì 🗈 🖆
0	Fore	ecasted Utili	zation																Q
																Alloc	ations		
		Resource	e▲		Investm	nent Role		Investmer	nt	Start	Finish	Allocation	Alloc %	Feb 16	Mar 16	Apr 16	May 16	Jun 16	Jul 16
	0,	Fiorina, Carly	2=	\times	Architect		Windows M	le Upgrade		1/4/16	12/30/16	6,240.00	300.00%	504	552	504	528	528	504
	0,	Walker, Darre	ali 🚨	\times	Business Ar	nalyst	Defend Pet	ersburg from the Y	/anks	12/1/15	12/5/16	106.00	5.00%	8	9	8	9	9	8
	Q,	Zemont, Gran	nt 🙎	\times	Project Man	ager	Windows M	le Upgrade		1/4/16	12/30/16	2,080.00	100.00%	168	184	168	176	176	168
																		Displaying	1 - 3 of 3
	Save	,																	

Best Practice Suggestions

- Manage allocations by the month
- Set filters to show where "issues" occur
 - Typical variance of allocation is +/- 25%
- Use hours as the Work Effort Unit of Measurement in organizations that have multiple availabilities for resources
 - FTE and Days use the Base Calendar default of 8 hrs to convert from hours
- Project Manager Team Detail is your best view
- Resource Manager Resource Workloads is your best view
- Compare Allocation against the prior two months of Actuals.

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Assignments





- Does your company currently use ETC? If so, what are the benefits you see? Drawbacks?
- If using ETC, do you compare remaining ETC against remaining allocations on the project?

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Assignment View

- On the Tasks Tab, select the Assignments view
- A very helpful and quick view into what a resource is working on in the plan

Filter						
Parent Task	# 🛇	Resource	Type All 🔻			
Include All Sub-Tasks			Resources an	d Roles ▼		
Exclude Completed Tasks		Assign	ed to 🏮 🛱 🕲			
From Date		F	Roles			
To Date			Developer Architect Business Anal	yst	* *	
Filter Show All Clear						
Name		Role	Start	Finish	Actuals	ETC
Risk Response and Mitigation Plan			2/2/15	2/13/15	0.00	160.00
Architect	E	Architect	2/2/15	2/13/15	0.00	80.00
🔲 🖬 Business Analyst 👔	18	Business Analyst	2/2/15	2/13/15	0.00	80.00
Complete Project Plan			2/16/15	2/20/15	0.00	80.00
Architect	=	Architect	2/16/15	2/20/15	0.00	40.00
Business Analyst		Business Analyst	2/16/15	2/20/15	0.00	40.00
Requirements Definition			2/23/15	2/27/15	0.00	120.00
🔲 🖵 Architect 🔯	12	Architect	2/23/15	2/27/15	0.00	40.00
🔲 🖵 Business Analyst 🔯		Business Analyst	2/23/15	2/27/15	0.00	40.00
Developer	=	Developer	2/23/15	2/27/15	0.00	40.00

Includes role assignments



Regarding ETC

- Unused ETC will move forward into the next available time period when actuals are applied:
 - If a task is starting late, make sure the start date is moved forward, otherwise the ETC will be overstated
- If building a WBS first, with Assignments and ETC, the ETC can be converted into Allocations using the Allocate from Estimate Feature on the Team Tab



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- Add ETC to the project team detail view
 - Allows the PM to see where ETC may be pilling up (slower burn on the tasks)
 - Allows the PM to see where the allocation may be greater than ETC (faster burn on tasks)
- When using ETC, be aware of start dates and tasks open for time. Delayed starts, without and adjustment of Task Start Date will push ETC forward.
- PMs and RMs should compare future Allocations against the ETCs to determine if an adjustment to the resources commitment level is needed

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Actuals





- Does your organization compare Allocations against Actuals?
- How often are allocations adjusted based on the amount of time a resource is tracking to the project?

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Actuals vs. Allocation

 By project displays total Actuals & ETC (total usage) and monthly timescale of variance hours

Workloads	Capacity	Allocations	Booking Status	Unfilled Roles	Aggregatio	on For	casted Utilizati	on Pend	ing Usage	Allocations v	s Actuals				
Resource View	ws: Allocat	ions vs Actu	als											×	ì 🗈 🖆
Allocations v	s Actuals														0
Variance Hours															
		nvestment		Resource	AI	ocation	Actuals	ETC	Total Usage	Feb 16	Mar 16	Apr 16	May 16	Jun 16	Jul 16
2015 Accounting In	tegration			Armstrong, Ken		1,098.84	495.00	67.82	:	563 70	77	67			
2015 eCommerce F	Portal			Armstrong, Ken		2,024.00	428.00	687.00	1,	115					
2015 Mobile Advert	tising			Armstrong, Ken		2,704.00	135.00	0.00		135 168	184	120			
2015 Software Impl	lementation			Armstrong, Ken		4,400.00	249.00	0.00	:	249 168	184	168	176	176	168
2015 Application Er	nhancements			Armstrong, Ken		2,384.00	62.00	1,498.00	1,	560 160					
Training Idea				Armstrong, Ken		8.00	0.00	0.00		0					
JS - Multi Year Proj	ect			Armstrong, Ken		5,216.00	0.00	0.00		0 168	184	168	176	176	168
ADVS Cemetery M	emorial Site - 1	5950 N Luckett Rd		Armstrong, Ken		3,344.00	0.00	0.00		0 168	184	168	176	176	168
														Displaying	1 - 8 of 8
Save															



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Actuals vs. Allocation Per Project

• Displays by project/resource Allocation, Actuals and the Variance Hours

			20	16-02-01		201	6-02-08		201	16-02-15		201	6-02-22	
		Total												
Project	Resource	Variance	Var Hours	Alloc	Actual	Var Hours	Alloc	Actual	Var Hours	Alloc	Actual	Var Hours	Alloc	Actual
		(145)	(39)	40	1	(40)	40	0	(26)	40	14	(40)	40	0
		(124)	(39)	40	1	(40)	40	0	(38)	40	2	(8)	8	0
	-	(124)	(40)	40	0	(36)	40	4	(40)	40	0	(8)	8	0
	-	(122)	(29)	40	11	(33)	40	7	(20)	40	20	(40)	40	0
		(108)	(13)	32	19	(31)	36	5	(32)	32	0	(32)	32	0
	-	(106)	(35)	0	35	(38)	0	38	(34)	0	34	0	0	0
	-	(89)	(29)	29	0	(29)	29	0	(2)	29	27	(29)	29	0
		(80)	(30)	10	40	(30)	10	40	(30)	10	40	(10)	10	0
		(80)	(5)	40	35	(20)	40	20	(14)	40	26	(40)	40	0
		(74)	(17)	20	3	(17)	20	3	(20)	20	0	(20)	20	0
		(68)	(28)	0	28	(27)	0	27	(14)	0	14	0	0	0
	-	(68)	0	0	0	(28)	0	28	(40)	0	40	0	0	0
		(67)	(10)	20	10	(17)	20	3	(20)	20	0	(20)	20	0
		(64)	(19)	20	1	(14)	20	6	(12)	13	1	(20)	20	0
		(60)	(10)	26	17	(13)	26	13	(11)	26	15	(26)	26	0
		(59)	0	0	0	(2)	0	2	(26)	30	4	(35)	35	0
		(59)	0	0	0	(33)	0	33	(36)	0	36	(10)	10	0
		(58)	0	40	40	(10)	40	30	(6)	36	30	(42)	42	0
		(55)	(10)	26	16	(6)	26	20	(12)	26	14	(26)	26	0
		(52)	(18)	0	18	(21)	0	21	(13)	0	13	0	0	0
		(52)	0	0	0	(17)	27	10	(9)	27	18	(27)	27	0
		(52)	(6)	29	23	(18)	29	10	(0)	29	29	(29)	29	0
		(51)	(2)	32	34	(28)	8	36						
		(51)	(20)	0	20	(16)	0	16	(15)	0	15	0	0	0
		(50)	0	0	0	(14)	0	14	(36)	0	36	0	0	0
		(49)	(16)	16	0	(3)	40	43	(4)	40	44	(40)	40	0
		(48)	(4)	0	4	(17)	0	17	(28)	0	28	0	0	0



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Total Actuals & ETC By Project

Rego - Actuals/ETC/Allocations per Resource												
Project Name		Start Date		Date	1/1/2015)						
Resource Name		End Date			Date	3/31/2016						
Time-Scaled Value Monthly V Filter Save Filter Clear												
						2015-02-01	2015-05-01	2015-11-01				
Project ID	Project Name	Resource Name	Total Allocation	Total Actuals To Date	Total ETC to Date	Hours	Hours	Hours				
PRJ0001	Bat Cave Re-Design	Dolak, Jerry	5,888	20.00	768	20.00						
PRJ0022	Big Bang Theory Superhero Contest	Dolak, Jerry	4,768	15.00	4,401	15.00						
PRJ0059	Big Project Multiple Year [JS]	Christiansen, Mike	835.2	118.00	717.2	80.00		38.00				
PRJ0059	Big Project Multiple Year [JS]	Dunst, Kirsten	6,224	72.00	6,152	72.00						
PRJ0059	Big Project Multiple Year [JS]	Dolak, Jerry	8,256	35.00	8,237	35.00						
PRJ0176	DemoProject	Dunst, Kirsten	800	24.00	576	24.00						
PRJ0176	DemoProject	Alfred, Al	175	40.00	560	40.00						
IDEA0008	Test Idea for WR0039	Alfred, Al	1,575	42.00	0	42.00						
PRJ0218	Clarity Implementation Project	Cronin, Ellen	1,400	95.00	140		95.00					
PRJ0218	Clarity Implementation Project	Almeida, Joe	1,424	131.00	109		98.00	33.00				
Total			31,345.2	592.00	21,660.2	328.00	193.00	71.00				

- This portlet displays Actuals & ETCs, by resource / project
- Total Allocation and total Actuals to Date for a resource/s they are allocated/assigned to.

 Project Manager and Resource Managers should compare Actuals (typically the last 4 weeks) against the Allocations to determine if future resource commitments should be adjusted

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Use Of Smart Notifications





- Does your organization use notifications out of CA PPM?
- Would you prefer to have CA PPM inform you when an action is needed?

Examples – Allocation Discrepancy Notification



- Benefit: Direct notification when the total allocation of a resource is +/-25% against overall availability. For example, a resource is allocated 65 hours in a week with only an availability of 40 hours per week.
- **Result:** Proactive notification of defined area of concern. No hunting and pecking though data to find problem.

Examples – Actual Discrepancy Notification



- **Benefit:** Direct notification when the actuals on a project are +/-25% against allocations set. For example, a resources has 50 actual hours for the week but was allocated only 20.
- **Result:** Proactive notification of defined area of concern. Immediate discussion can occur with resource.

- Use notifications for specific actions needed, you do not want to over communicate
- Emails will provide direct links into CA PPM for an action

Missing Time?

- Time views help RM's see timesheet statuses of their direct reports
- Keeping a check on your team's timesheet submissions, can support the weekly approval process:
 - This Missing Time by RM portlet displays all missing or late timesheets
 - Resources will be listed where a timesheet is not posted
 - RM's can use this portlet to determine the timesheet status of all resources in open time periods

Missing Time by Resource Manager									
Resource	Name		Timesheet Stat	15					
Resource Mar	nager	Actual Days							
Period	Start 6/23/2014	6/23/2014 III Actual Hours							
Filter Show	v All Save Filter	Clear							
Stoplight	Period Start	Resource Name	Status	Actual Hours	Actual Days				
e	6/23/14	Garrick, Jay	Submitted	45	5.625				
					Displaying 1 - 1 of 1				



Adoption Metrics



Best Practice Suggestions

- Adoption Metrics ensure resources are using the tool and keeping the data updated and accurate.
- The goal is not just have "high scores". It's to ensure you're getting the most from your resource's time and the most value from your investment in the CA PPM software.
- Adoption metrics can track that fields are filled out on a resource or project. They can check that allocations, actuals and ETCs are properly set based on a sliding scale (0-5 typically) and much more.

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Resource Allocation Metric Example

- Purpose/Description indicates if the Resource Manager is keeping total resource allocations within the expected range for future time periods
- Selection Criteria
 - Resource is Active
 - Resource is Open for Time Entry
- Calculations
 - 5 Resource has an allocation percent between 80% 120% for the next 120 days
 - 4 Resource has an allocation percent between 70% 130% for the next 120 days
 - 3 Resource has an allocation percent between 80% 120% for the next 90 days
 - 2 Resource has an allocation percent between 70% 130% for the next 90 days
 - 1 Resource has an allocation percent between 70% 130% for the next 30 days
 - 0 Resource has an allocation percent outside 70% 130% for the next 30 days
- Formula: Allocation Percent Total Allocations / Total Availability
- Variation: Percent ranges and timeframes



Project Commitment Metric Example

- Purpose/Description
 - Provides a measurement for the Hard Allocations at the project level over a 2 week timeframe
- Selection Criteria
 - Active projects only (active/approved/started)
 - Excludes programs and templates
 - Roles are not included in the analysis
 - Can also opt to choose based on project stage
- Calculations
 - 5 Project Commitment for named resources in the next 14 days between 80% and 100%
 - 4 Project Commitment for named resources in the next 14 days between 60% to 80%
 - 3 Project Commitment for names resources in the next 14 days between 40% to 60%
 - 2 Project Commitment for named resources in the next 14 days between 20% to 40%
 - 1 Project Commitment for named resources in the next 14 days between 1% to 20%

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- 0 Project Commitment for named resources in the next 14 days less than 1%
- Formula Project Commitment = Hard Allocation Hours / Total Allocation Hours
- Variations Percentages and timeframes

Resource Lowest / Highest Adopters

Provides a view into which resource managers have the highest or lowest adoption scores by looking at an average overall score for all Resource metrics or by an individual metric.

- Selection Criteria:
 - Resource is Active
 - Resource is Open for time entry
- Calculations:
 - 0 Null values are not calculated into the averages
- Formula: A= Sum of all Individual Resource metric Values ÷ the Number of Resource metric values
- Variations: None



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Questions?





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- Enter **Description**
- Enter Date Started
- Enter Date Completed
- Provide Contact Person Name of Person to Contact
- Provide Contact E-Mail E-Mail of Person to Contact
- Enter Number of PDU's Claimed (1 PDU per course hour)
- Click on the I agree this claim is accurate box
- Click Submit button





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