



*rego*University 2017

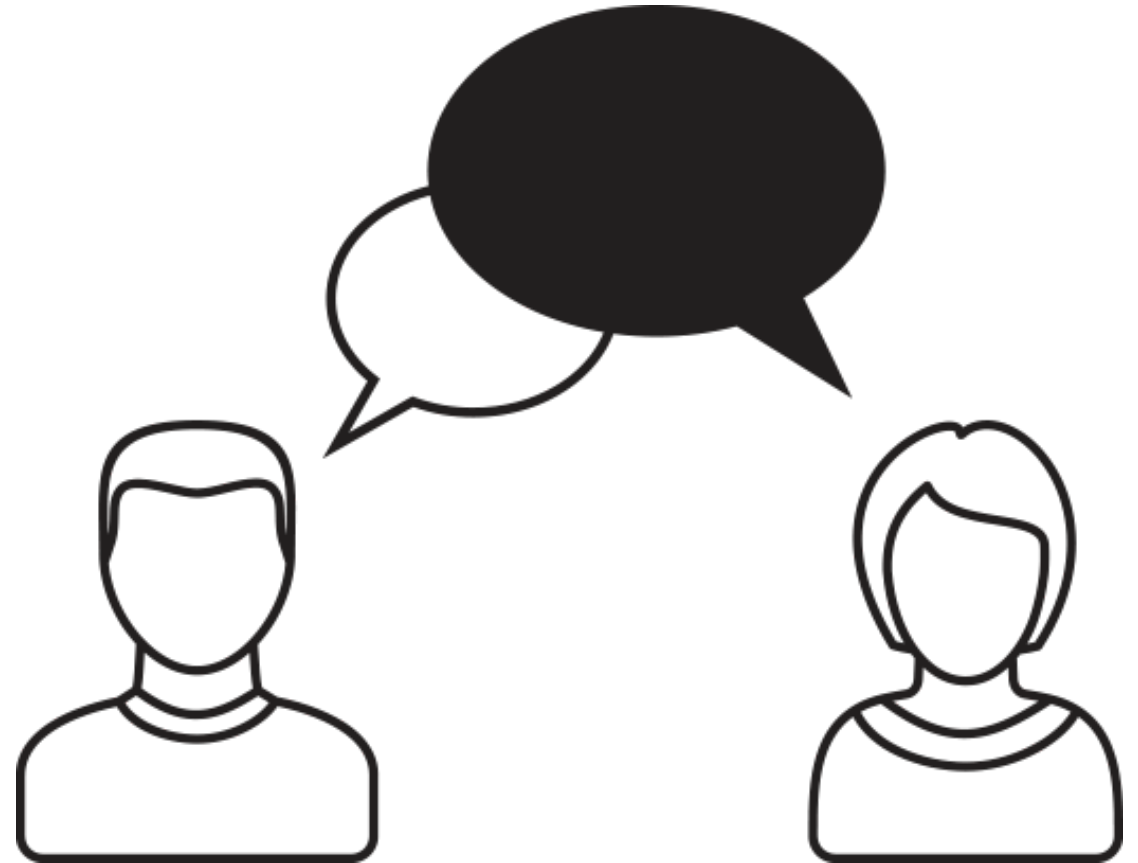
Resource Manager | Best Practice “Day in the Life”

Your Guide: Jerry Dolak, Christi Rice

Introductions

2

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



Agenda

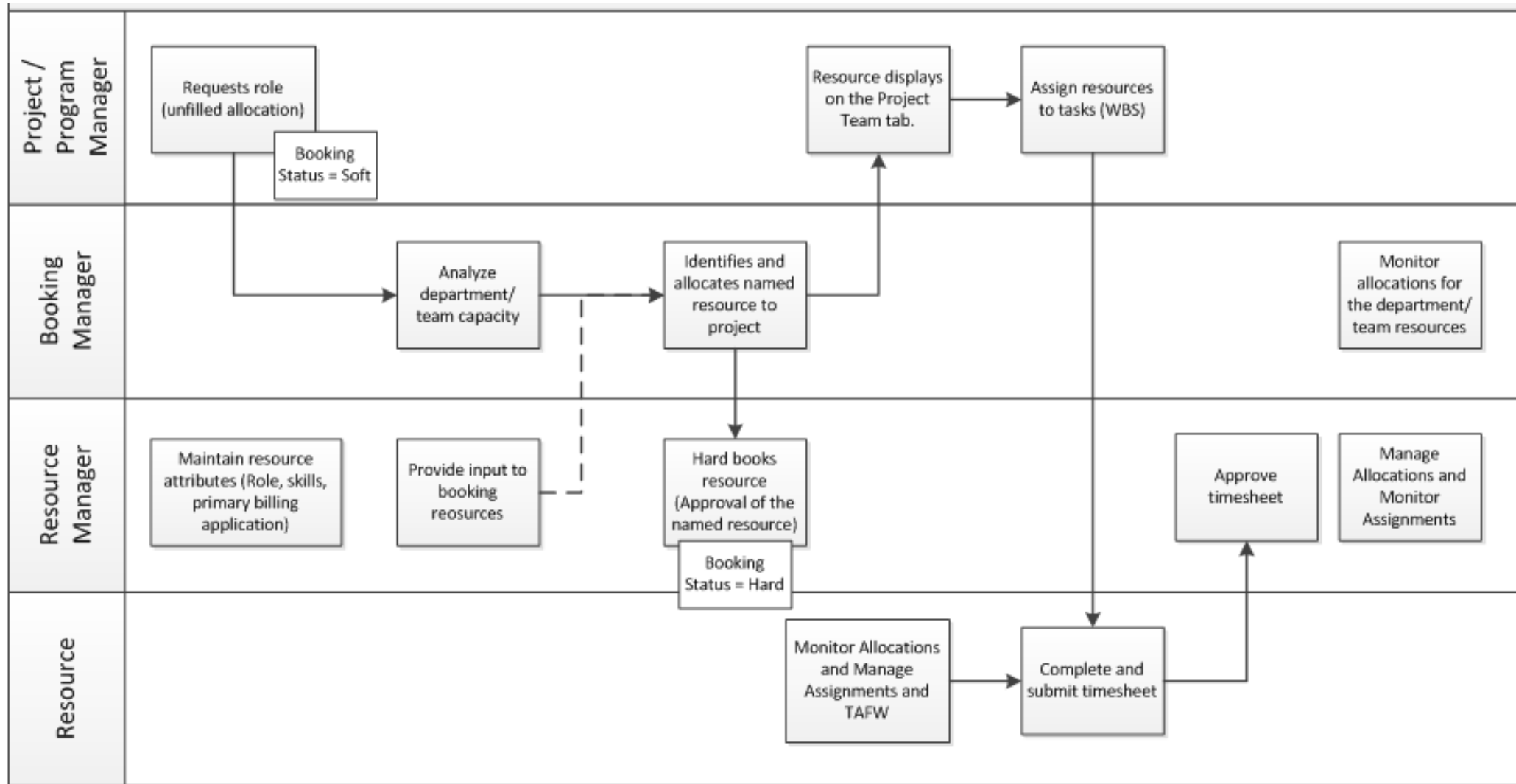
- “Best Practice” Resource Management Process
- Weekly Checklist for Resource Managers
- Tips and Tricks
- Agile Team Resource Management Options
- RegoXchange Portlets to Make Life Easier

Open Discussion #1

- What is your weekly resource management routine?
- What steps in the process seem 'broken'?



“Best Practices” Resource Management Process



Weekly Checklist For Resource Managers

Weekly Task	Why?
Review and approve timesheets	To ensure accuracy and compliance
Review Unfilled Allocations for your team/department.	Replace requested roles with named resources
Review 'Workload' portlet for your Resources to ensure appropriate utilization	To ensure resource is appropriately utilized. Inaccurate forecast can impact organizational staffing.
Review resource allocations (project level assignments) for accuracy.	To ensure resource forecast for each project is accurate Inaccurate forecast can impact organizational staffing.
Review 'All Assignments' to ensure resources are completing assignments on time and within appropriate amount of effort	To ensure resource is completing tasks on time and within appropriate effort.

New Hire/Transfer Employee Task	Why?
Review resource properties for accuracy	Ensure all attributes are correct (Primary Role, Primary Skill, general details) Attributes are used for capacity / demand planning

Open Discussion #2

- How much time do you spend managing resource data?
- What best practices, tips or tricks have you discovered?



Tips And Tricks

- Use notifications to prompt user action or increase awareness
 - Resource added to the system; Key changes to a resource record; Resource Over/Under Allocated; New Demand; Unfilled Demand Aging
- Do you have a high turnover of resources within a project? Do you struggle with “how do I move the demand from a named resource to a role until a new resource is found?”
 - Simply use the resource finder, with one slight change.
 - The resource finder has a hidden filter “is role = NO”, but you can change it to a non-hidden drop down and still default it to no, but change it to YES when you need to move future demand to an unnamed role.

Filter: None ▼

Resource Name

Resource ID

OBS Unit ⓘ

OBS Unit - Filter Mode

Role ⓘ

Employment Type

Availability ⓘ ⓘ

Availability Threshold (%) (Hide results below this amount)

Include Soft-booked Resources ☐

Skills ⓘ ⓘ

Skills Threshold (%) (Hide results below this amount)

Is Role

Power Filter [Build Power Filter]

Resource▲	Resource ID	Primary Role	Employment Type	Availability Match
Adams, Kurt	ADAKUR	~Architect	Employee	
Brewer, Tim	BRETIM	~Architect	Employee	
Charter, Michael	CHAMIC	~Architect	Employee	
Christie, Bob	CHRB0B	~Architect	Employee	

Tips And Tricks

- Set the default view in projects to show aggregate allocation. This will allow PMs to see how their project impacts the overall allocations to a resource.
 - Many time scaled views in other locations can be updated to include more than just allocation, including ETC, Actuals, and Aggregate Allocation
- Change timescales to monthly to facilitate easier population of allocated hours by month.

Filter: System Default ▾												Allocation By Period				
			Resource/Role▲	Project Role	Booking Status	Start	Finish	Allocation	Actuals	ETC		Jan 16	Feb 16	Mar 16	Apr 16	May 16
<input type="checkbox"/>			~Architect	~Architect	Mixed	12/1/14	11/30/15	1,771.00	0.00	0.00	Allocation Aggregate Allocation Resource Availability	7,084.12	7,185.71	8,124.23	7,689.71	7,259.4
<input type="checkbox"/>			~Business Technology Partner	~Business Technology Partner	Mixed	12/1/14	11/30/15	177.10	0.00	0.00	Allocation Aggregate Allocation Resource Availability	4,098.90	4,155.20	4,718.10	3,937.50	3,500.0
<input type="checkbox"/>			Dryden, Keith	~Project Manager	Soft	12/1/14	11/30/15	0.00	0.00	0.00	Allocation Aggregate Allocation Resource Availability	993.11	1,164.67	1,210.75	1,105.47	977.9
<input type="checkbox"/>			~Information Management Specialist	~Information Management Specialist	Mixed	12/1/14	11/30/15	1,771.00	0.00	0.00	Allocation Aggregate Allocation Resource Availability	155.40	155.40	170.20	155.40	155.4
<input type="checkbox"/>			~Information Management Specialist	~Information Management Specialist	Mixed	12/1/14	11/30/15	1,771.00	0.00	0.00	Allocation Aggregate Allocation Resource Availability	4,949.86	5,838.56	7,059.35	6,691.72	6,694.0
<input type="checkbox"/>			Kloack, Dave	~Business Analyst	Mixed	12/1/14	11/30/15	1,720.40	83.50	10.00	Allocation Aggregate Allocation Resource Availability	895.00	929.00	881.80	718.20	660.4
												142.80	142.80	156.40	142.80	142.8

- Use the department OBS in combination with primary role to help eliminate the need for redundant roles (ex. Team X developer, Team Y developer)
- Leverage adoption metrics to monitor and improve adherence

Agile Team Options Resource Management



- Create a role = agile team.
 - Each team is a unique role
 - Allows a team to be staffed to a common team while being recognized throughout the system.
 - The team (role) can have capacity of X hours per day (based on each member in the team having an availability of 8 hours each).
 - When you replace, you replace and add all of the people on the team so they can track time.
 - Allows you to plan by team on the portfolio.
- Use staff OBS to represent a given agile team, then pull all your reporting based on Staff OBS
- Create a new field on the resource record titled “team” (or something similar), then have each person populate the name of their team.
 - Update the applicable portlets to be able to filter/list results by the new Team attribute.
 - Add Team field to the team object/tab within a project or idea.
 - Pull all reporting based on this new attribute.

Open Discussion #3

- How do you know if your data is good?
- Which reports/portlets do you use to report capacity, demand and other resource management information?



RegoXchange Portlets to Make Life Easier

- Data Issues – Resource portlet
 - Used to identify data exceptions related to resource setup.
 - This portlet helps to identify where resources are missing key data or are possibly sitting in an exception state.
 - This view will show resources that have one or many exceptions, including inactive resources.

Data Issues - Resources

Resource Resource Name

Resource OBS Days Power Filter [\[Build Power Filter\]](#)

[Filter](#) [Save Filter](#) [Clear](#)

Resource Name	No Resource Manager	Inactive Without End Date	Inactive Still OTE	Not Financially Enabled	Active Mismatch	Old Login Date	No OBS	Inactive Manager	Booking Manager
Administrator, Niku									
scheduler, scheduler									
Process Administrator									
Administrator, XC									
Doe, John									
Doe, Jane									
Admin, PMO									
US, BaseCalendar									
Standard, BaseCalendar									
Sheppler, Tom									
Hill, Robbin									
Rimmasch, Ben									
Hensel, Ross									
Matzdorf, David									
Kunkulol, Atul									
Fulk, Vivian									
Hackney, Ron									
Greer, David									
Wolf, Jim									
Riley, Marc									

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

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RegoXchange Portlets to Make Life Easier

- RM Governance portlet
 - Provides resource availability, allocation, and comparison of the two values at 2, 4, and 8 week intervals.
 - Provides an easy view into the capacity and demand for each resource.

RM Governance

Resource OBS  

Resource Manager  

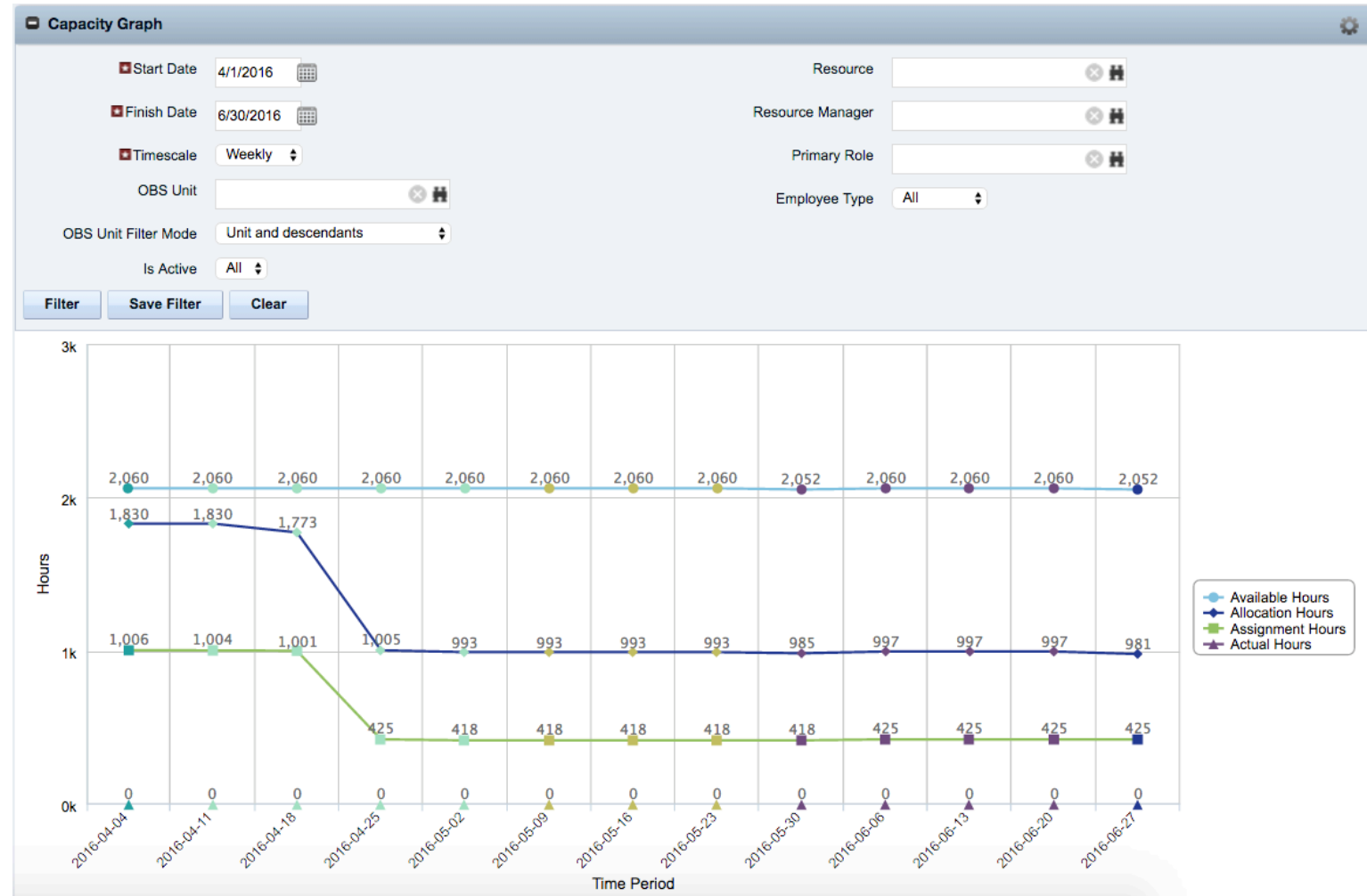
OBS Mode Unit and descendants

Filter Show All Save Filter Clear

Resource	Availability Hours (2 Weeks)	Allocation Hours (2 Weeks)	Allocation vs Availability (2 weeks) %	Assignment Hours (2 Weeks)	Allocation vs Assignment (2 weeks) %	Availability Hours (4 Weeks)	Allocation Hours (4 Weeks)	Allocation vs Availability (4 weeks) %	Assignment Hours (4 Weeks)	Allocation vs Assignment (4 weeks) %	Availability Hours (8 Weeks)	Allocation Hours (8 Weeks)	Allocation vs Availability (8 weeks) %	Assignment Hours (8 Weeks)	Allocation vs Assignment (8 weeks) %
Administrator, Niku	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Doe, John	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Zywiec, David	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Wuenstel, Chris	80	160	●	80	▲	160	320	●	160	▲	240	480	●	240	▲
Admin, PMO	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Hensel, Ross	80	8	▲	8	■	160	16	▲	16	■	240	24	▲	24	■
Hackney, Ron	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Trainor, Pat	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Kent, Clark	80	160	●	160	■	160	320	●	320	■	240	480	●	480	■
Alfred, Al	80	8	▲	8	■	160	16	▲	16	■	240	24	▲	24	■
Wuenstel, Chris	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲

RegoXchange Portlets to Make Life Easier

- Capacity Graph portlet
 - Displays Availability, Allocations, Actuals and Assignments for one or more active resource(s) in a single view
 - Provides Resource Managers, PMOs and Executives with a simple way to analyze: Allocations vs. Availability, Allocations vs. Actuals, Allocations vs. ETC and ETC vs. Availability.



Questions?



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- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- 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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