

*rego*University 2017

# RM & PM User Interface | Tips and Tricks

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# Introductions

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



# Our Goal And Purpose

- Purpose: to make life a little easier using CA PPM in providing support for Resource and Project Managers.
- Goal: to hear you say “I didn't know you could do that!”

# Agenda

- Open Mic
- PM Tips and Tricks
- RM Tips and Tricks
- Questions

# Open Mic

- Do you find CA PPM difficult to use?
- What are some of your pain points?
- What do you find difficult?

# Saving Favorite Links And Adding Sections

- Add your favorite links and actions. Go to Favorites menu > Configure > Add Section > Next > Fill out fields > Save and Return
- Then checkmark next to the links and click the Move button to place them under the appropriate sections

The screenshot displays the 'Favorites' configuration page in the Rego system. The 'My Links' section is active, showing a list of links: 'Projects List Page', 'Project #1 - Dept Test Pgm', 'Project #2 - Build a Software Solution', and 'PM Dashboard'. Below the list are buttons for 'Add Current', 'Configure', and 'Refresh'. A 'Move' dialog is open, showing a list of items with checkboxes. The 'New Project' and 'Create a New Resource' items are checked. The 'Move' button is highlighted. To the right, the 'Menu Item' section shows a list of items with radio buttons. The 'My Links' item is selected. The 'Save And Return' button is highlighted.

Administration	Favorites
	<div> <div>My Links</div> <div>Resource Links</div> <div>Portlets</div> <div>Actions</div> </div> <div> <div>Projects List Page</div> <div>Project #1 - Dept Test Pgm</div> <div>Project #2 - Build a Software Solution</div> <div>PM Dashboard</div> </div> <div> <div>Add Current</div> <div>Configure</div> <div>Refresh</div> </div>

☐ Actions
 ☒ New Project
 ☒ Create a New Resource
 ☐ Run Capacity Report

Move

Reorder

Add

Menu Item

☒ My Links
 ☐ Resource Links
 ☐ Portlets
 ☐ Actions

Save And Return

Return

# What Do The Asterisks Mean?

Red = a required field exists and is empty

Gray = a required field exists and is filled

None = no required field exists

The image shows three overlapping windows from the Rego software interface, illustrating the meaning of asterisks in different colors:

- Project Template: SDLC Template - Create Project**: The "General" tab header has a red asterisk icon, indicating a required field exists and is empty.
- Project: A Test Project - Properties**: The "General" tab header has a gray asterisk icon, indicating a required field exists and is filled.
- Copy Template Project Options**: The header has no asterisk, indicating no required field exists. The form contains:
  - Template Name: SDLC Template
  - Scale Work By: 0%
  - Scale Budget By: 0%
  - Convert resources to roles: ☒
  - Legend: = Required = Unique

# Collapse And Expand Sections

Click the section bars to collapse/expand that section

Project: A Test Project - Properties Open in Scheduler Scenario: [--Select--] Actions

General

Stakeholders

Organizational Breakdown Structures

Department OBS

Geographic location

Organization1

Portfolio OBS

TEP Customer Type

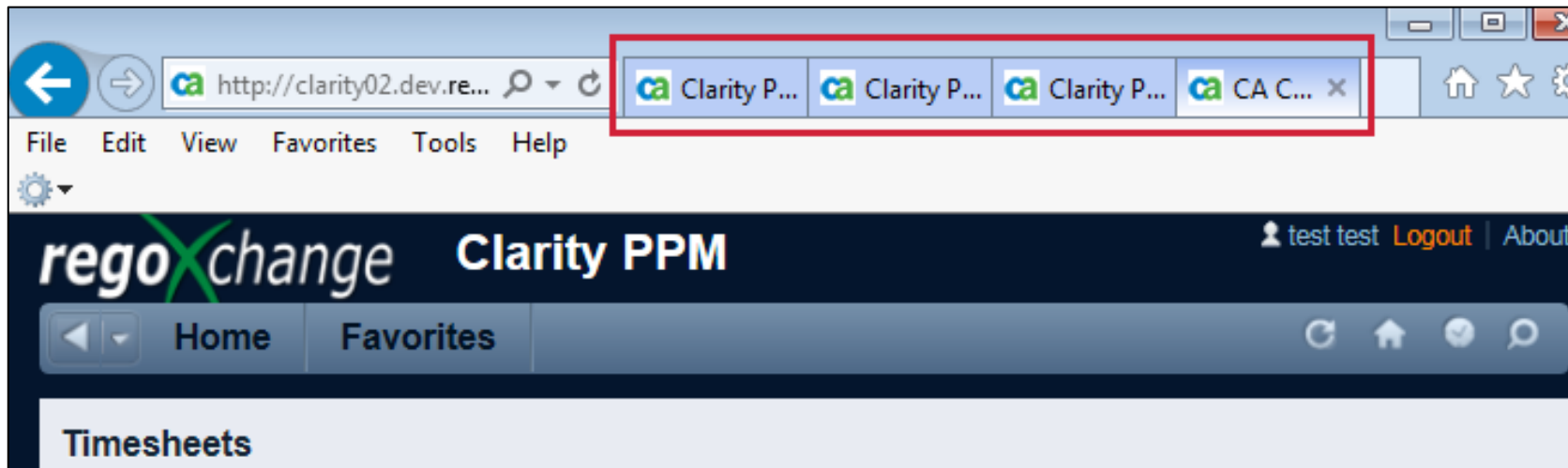
TEP AREA

= Required = Unique



# Open Multiple Tabs In CA PPM To Save Time

- Did you know you can have multiple tabs open in CA PPM?
- Save navigation time by jumping back and forth between tabs
- Right-click on a link and:
  - In IE click **Open in new tab**
  - In Firefox/Chrome click **Open link in new tab**



# Save Time By Saving A Filter

- Save a “My Team” or “My Projects” filter and make it your Default filter. Save Portlet filters too!
- Go to the Portlet/Page > Enter filter criteria > Filter > Save Filter > Enter a Name > Check Default > Save and Return

Content: Resources - Save Filter

☐ \*Filter Name

Default ☒

☐ = Required \* = Unique

Resource List

▼

Resource/Role Name

Content: Projects - Save Filter

☐ \*Filter Name

Default ☒

☐ = Required \* = Unique

Projects

▼

Project Name

# Populate Timesheets Quickly

- Quickly fill a timesheet by clicking the **Populate** button.
- Click **Configure** to select Populate options, then **Populate**.
- In 14.4, “Copy time entries from previous timesheet” has been adjusted to **ONLY** pull tasks from the previous timesheet (no longer includes tasks that you have ETC on).

Investment	Description	Investment ID	Sun 7/12	Mon 7/13	Tue 7/14	Wed 7/15	Thu 7/16	Fri 7/17	Sat 7/18	Total	ETC	Posted Actuals	Input Type Code
	Total		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			

### Time Entry Options

Populate assigned tasks ☒

Copy time entries from previous timesheet ☐

☐  
( Include actuals from previous timesheet (except for incidents) )

Display Unit

Decimal Places

# Turn User Notifications On/Off

- Alerts, Email and Text Messages (SMS) are available
- Go to Home > Personal > Account Settings > Notifications
- Enter a SMS address on the Personal Information tab

**Account Settings: Notifications**

Functional Area	<input type="checkbox"/> Alert	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
Action Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Change Requests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Discussions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Escalations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Incidents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Issues	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Processes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reports and Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Requisitions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Risks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Timesheets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Reset **Save**

**Personal Information** | Proxy | Notifications | Soft

**Account Settings: Personal Information**

**General Information**

User Name test

Last Name test

First Name test

Email Address test@example.com

SMS Address **7738727676@tmomail.net**

Work Phone

1. T-Mobile: @tmomail.net
2. AT&T: @txt.att.net
3. Sprint: @messaging.sprintpcs.com
4. Verizon: @vtext.com



# Copy And Paste In Time-Scale Grid Views

Need to fill the same value in multiple cells?

1. Click in cell (edit mode), hit the enter key (display mode)
2. Shift + Arrow keys to highlight additional cells
3. Ctrl + C (dashes appear)
4. Click in the destination cell to paste, hit the enter key
5. Ctrl + V (paste values in)
6. Save your changes

	, 2015	Jan 1, 2016-Jan 31, 2016	Feb 1,
Cost		5,000	
Actual Cost		0	
Cost Variance		5,000	
Cost	5,060	220	
Actual Cost	0	0	
Cost Variance	5,060	220	
Cost	5,060	220	
Actual Cost	0	0	
Cost Variance	5,060	220	
Cost	0	0	
Actual Cost	0	0	

	Oct 1, 2015-Oct 31, 2015	Nov 1, 2015
Cost	0	
Actual Cost	0	
Cost Variance	0	
Cost	0	
Actual Cost	0	
Cost Variance	0	
Cost	0	
Actual Cost	0	
Cost Variance	0	
Cost	4,400	
Actual Cost	(4,400)	

	Oct 1, 2015-Oct 31, 2015	Nov 1, 2015
Cost	5,000	
Actual Cost	0	
Cost Variance	0	
Cost	220	
Actual Cost	0	
Cost Variance	0	
Cost	220	
Actual Cost	0	
Cost Variance	0	
Cost	4,400	
Actual Cost	(4,400)	

# Copy And Paste Entire Row, Column Or Table

- Select an entire row
  - Press Shift + Ctrl + Right Arrow to select the entire row
- Select an entire column
  - Press Shift + Ctrl + Down Arrow to select the entire column
- Select entire grid
  - Use both steps above to select all cells in the grid
- To delete multiple values, select one or more cells and press the Delete key

	Amounts By Period										
	Oct 1, 2015-Oct 31, 2015	Nov 1, 2015-Nov 30, 2015	Dec 1, 2015-Dec 31, 2015	Jan 1, 2016-Jan 31, 2016	Feb 1, 2016-Feb 29, 2016	Mar 1, 2016-Mar 31, 2016	Apr 1, 2016-Apr 30, 2016	May 1, 2016-May 31, 2016	Jun 1, 2016-Jun 30, 2016	Jul 1, 2016-Jul 31, 2016	
Cost	0	0	0	5,000	0	0	0	0	0	0	0
Actual Cost	0	0	0	0	0	0	0	0	0	0	0
Cost Variance	0	0	0	5,000	0	0	0	0	0	0	0
Cost	0	0	5,060	220	1,000	0	0	0	0	0	0
Actual Cost	0	0	0	0	0	0	0	0	0	0	0
Cost Variance	0	0	5,060	220	1,000	0	0	0	0	0	0
Cost	0	0	5,060	220	825	0	0	0	0	0	0
Actual Cost	0	0	0	0	0	0	0	0	0	0	0
Cost Variance	0	0	5,060	220	825	0	0	0	0	0	0
Cost											
Actual Cost	4,400	0	0	0	0	0	0	0	0	0	0
Cost Variance	(4,400)	0	0	0	0	0	0	0	0	0	0

# Update Allocation Hours On Team Detail Page

- Go to Project > Team > Detail page
- Enter allocations in hours by week, month or year
- CA PPM converts hours into a %-based allocation segment

Properties **Team** Tasks Financial Plans Risks/Issues/Decision Log Chargebacks Hierarchy Processes Audit Trail Dashboard PM Views

Project: A Test Project - **Team - Detail** Scenario: [-Select-] Actions

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	Jun 16	Jul 16	Aug 16	Sep 16	Oct 16	Nov 16	Dec 16
<input type="checkbox"/>	Benson, Bradley	Business Analyst	Soft	10/19/15	12/31/16	504.00	0.00	0.00		42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00
<input type="checkbox"/>	Bishop, Mike	Project Manager	Soft	10/19/15	12/31/16	2,353.50	0.00	0.00		168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00
<input type="checkbox"/>	Chouhan, Vipin	Allocation					0.00	0.00		60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00
<input type="checkbox"/>	Scarlato, Jennifer						0.00	0.00		50 84.00	50 84.00	50 84.00	50 84.00	50 84.00	50 84.00	50 84.00	50 22.00	50 22.00	50 22.00	50 22.00	50 22.00
<b>Total</b>										0.00	0.00	354.00	354.00	354.00	354.00	354.00	354.00	292.00	292.00	292.00	292.00

Displaying 1 - 4 of 4

Allocation

	Start	Finish	% Allocation
<input type="checkbox"/>	12/1/2015	12/31/2015	50.00%
<input type="checkbox"/>	1/1/2016	2/29/2016	29.76%
<input type="checkbox"/>	3/1/2016	3/31/2016	27.17%
<input type="checkbox"/>	4/1/2016	4/30/2016	29.76%
<input type="checkbox"/>	5/1/2016	6/30/2016	28.41%
<input type="checkbox"/>	7/1/2016	7/31/2016	29.76%
<input type="checkbox"/>	8/1/2016	8/31/2016	27.17%
<input type="checkbox"/>	9/1/2016	9/30/2016	28.41%
<input type="checkbox"/>	10/1/2016	10/31/2016	29.76%
<input type="checkbox"/>	11/1/2016	12/31/2016	28.41%

Save Add Add/Up

# Team-Detail Page View Configuration

- Adding Availability, Actuals and ETC give the RM/PM a clear view for comparisons on the project
- Aggregate Allocation shows all allocations for the resource

Value Attributes

Available

Aggregate Allocation (Compare To)

Aggregate Hard Allocation

Aggregate Hard Allocation (Compare To)

Allocation (Compare To)

Selected

Allocation







Aggregate Allocation

Resource Availability

Actuals

Show Legend Column

☒

				Allocation By Period												
	Resource/Role	Project Role	Booking Status		Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16	Jul 16	Aug 16	Sep 16	Oct 16	Nov 16	Dec 16
<input type="checkbox"/>	  Benson, Bradley	 Business Analyst	Soft	Allocation	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00
				Aggregate Allocation	1,251.60	1,361.58	1,487.26	1,236.34	957.20	957.20	915.60	998.80	957.20	915.60	957.20	861.20
				Resource Availability	168.00	168.00	184.00	168.00	176.00	176.00	168.00	184.00	176.00	168.00	176.00	176.00
				Actuals												
				ETC		28.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00	42.00
<input type="checkbox"/>	  Bishop, Mike	 Project Manager	Soft	Allocation	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00
				Aggregate Allocation	420.00	420.00	444.00	348.00	256.00	256.00	252.00	260.00	256.00	252.00	256.00	256.00
				Resource Availability	168.00	168.00	184.00	168.00	176.00	176.00	168.00	184.00	176.00	168.00	176.00	176.00
				Actuals												
				ETC		112.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00	168.00



# Highlight Rows And Expanding/Collapsing Filters

- Remove/Change Highlight Row
  - Your Portlet > Options > Configure > List Column Section > Options > Highlight Row by Attribute

<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRJ0162	test	Another Task Dep Test Pgm	Administrator, Niku	<input type="text"/>	12/29/14	12/31/15		0.00	0.00	0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRJ0145	asdfad fasd		Meyers, Michael	<input type="text"/>	10/27/14	3/31/15		0.00	0.00	0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRJ0001	Bat Cave Re- Design		Sam, Uncle	<input type="text"/>	8/27/12	7/8/15	865,000.00	277.00	10,569.05	10,846.05	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRJ0026	Batman Program		West, Wally	<input type="text"/>	1/1/12	4/20/20		0.00	0.00	0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRJ0269	BEL - Time Smoothing		Lofton, Brian	<input type="text"/>	11/2/15	2/26/16		0.00	540.00	540.00	

Highlight Row by Attribute

Approved Flag  
( A row will be highlighted when this attribute is not zero )


- Portlet filter section can be defaulted to be expanded or collapsed
  - Your Portlet > Options > Configure > List Filter Section > Layout > Settings section > Default Filter State

Default Filter State

☐ Collapsed



☒ Expanded

# Add a Link to a List View

- Your Portlet > Options > Configure > List Column Section > Fields > Select the Attribute Properties(  )
- You may add a link to any page you have view access. Also, some out of the box pages (Documents, Discussions, Subprojects, Status Reports, Gantt, etc)

Portlet: Project List - List Column Field

General

Attribute	Name
Data Type	String
<input checked="" type="checkbox"/> Column Label	Project 
Show Column Label	<input checked="" type="checkbox"/>
Display Type	Text
Secondary Value	[--Select--]
Alignment	Left 
Column Width	20 %
Width	<input type="text"/> ( Number of columns )
Height	<input type="text"/> ( Number of rows )
Allow Word Wrapping in Column Header	<input checked="" type="checkbox"/>
Allow Word Wrapping in Column	<input type="checkbox"/>
Link	<div> <div>[--Select--]</div> <div> Project Properties  Project Overview  <input checked="" type="checkbox"/> Project Default  Link to the Idea Property Page  Link to the documents page  Link to the discussions page  Link to the subprojects page  Link to Project Staff Details  Link to the Gantt page  Charge Codes  Generate Status Report  PMO Accelerator Project Dashboard Link  Project Business Alignment Link  Program Properties SubPage Risk link  Program Properties SubPage Schedule link  PMO Accelerator Project Dashboard Link  Status Reports  Project Business Alignment Link  Project Properties SubPage Program Management Plan link  Program Properties SubPage Program Management Plan link  Project Properties SubPage Project Status Report List link  Program Properties SubPage Program Status Report List link  Project Properties SubPage Quality Attributes link </div> </div>
Disable Link Attribute	<input type="checkbox"/>
Allow Editing	<input type="checkbox"/>

Save Save And F

☒ = Required

4/25/16 6/30/17

New from Template

# Add a New Image and Link to a List View

- Your Portlet > Options > Configure > List Column Section > Fields > New
- Select Image and then select and image and the desired link.
- In this example, we've created a new link to the Status Reports of the project from the list view.

**Create Virtual List Column**

Display Type ☐ Gantt ☒ Image ☐ Progress Bar

**Portlet: Status Reports - List Column Field**

**General**

☒ Column Label

Show Column Label ☐






Allow Word Wrapping in Column Header ☐

Image

Link

Open as Pop-up ☐

**Next**

<input type="checkbox"/>	Project	Investment ID	Start	Finish	Actuals	
<input type="checkbox"/>	FRONT OFFICE	CAT-1307	1/1/16	1/1/21	10,502	
<input type="checkbox"/>	INFRASTRUCTURE	CAT-1309	1/1/14	9/30/21	37,743	
<input type="checkbox"/>	UltraPIPE 10.7 Update	PRJ-2322	12/19/16	3/3/17	0	
<input type="checkbox"/>	Business Analysis Tools	CAT-1224	1/1/10	12/31/17	2	
<input type="checkbox"/>	CAPABILITIES	CAT-1308	1/1/16	3/31/21	2,842	

# Add A Totals Row On Portlets

- Add a “Totals” row to the bottom of almost any portlet to calculate Sum, Average, Count, Min, Max, Std Dev., and Variance

			Resource/Role▲		Project Role	Booking Status	Start	Finish	Allocation	Actuals	ETC
<input type="checkbox"/>		Q	Benson, Bradley		Business Analyst	Soft	10/19/15	12/31/16	504.00	0.00	448.00
<input type="checkbox"/>		Q	Bishop, Mike		Project Manager	Soft	10/19/15	12/31/16	2,353.50	0.00	1,792.00
<input type="checkbox"/>		Q	Chouhan, Vipin		Developer	Soft	10/19/15	12/31/16	1,152.00	0.00	640.00
<input type="checkbox"/>		Q	Scarlato, Jennifer		Architect	Soft	12/1/15	12/31/16	692.00	40.00	533.33
Totals							10/19/15	12/31/16	4,701.50	40.00	3,413.33



# Set Sub Projects To Read-Only

- Open Programs or Master projects in MSP or OWB without locking the sub-projects below it
- Go to Project > Properties > Subprojects > Set Read-Only
- This will allow PMs to edit the WBS on the Program/Master project level without locking the children

Project - Properties - Subprojects

Active: Yes

Show All Clear

Project	ID	Count	Actuals	ETC	Total Effort	Percent Expended	Baseline	Status	Schedule	Read Only
<input checked="" type="checkbox"/> Test Project	PR000271	0	0	5,013	5,013	0.00%	0	On Track		
Total		1	0	5,013	5,013	0.00%	0	On Track		

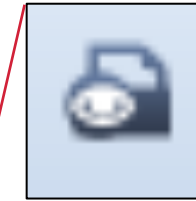
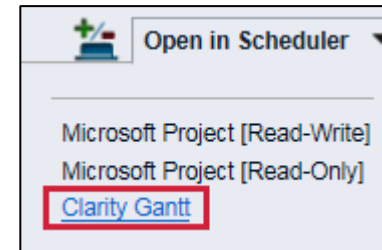
Displaying 1 - 1 of 1

Add Remove **Set Read-Only** Set Read/Write

Folder icon = Program Work Effort = Hours

# Print From The CA PPM (Clarity) Gantt View

- Open up the Clarity Gantt
- Add preferred column in your view
- Click the **Printable View** icon



Project: SDLC Template - Gantt

Filter: System Default

Task	Start	Baselin...	Finish	Basel...	Duration	% Co...	Assigned Resources	OTE
Initiation Phase	4/1/14		4/1/14			1	0.00%	✓
Initiating Process Complete	4/1/14		4/1/14			0	0.00%	✓
Planning Phase	4/1/14		4/28/14		20	0.00%		✓
Define Scope Change and Contr	4/1/14		4/7/14		5	0.00%	Project Manager	✓
Define Resource Plan	4/8/14		4/21/14		10	0.00%	Project Manager	✓
Risk Response and Mitigation Pl	4/8/14		4/21/14		10	0.00%	Architect;Business Analyst	✓
Identify Infrastructure Requirem	4/22/14		4/28/14		5	0.00%	Network Engineer;Storage...	✓
Complete Project Plan	4/22/14		4/28/14		5	0.00%	Architect;Business Analys...	✓
Planning Phase Gate Complete	4/28/14		4/28/14		0	0.00%		✓
Design Phase	4/29/14		5/19/14		15	0.00%		✓
Requirements Definition	4/29/14		5/5/14		5	0.00%	Architect;Business Analys...	✓
Functional and Technical Desig	5/6/14		5/19/14		10	0.00%	Developer;Storage Architect	✓
Design Phase Gate Complete	5/19/14		5/19/14		0	0.00%		✓
Construction Phase	5/20/14		6/23/14		25	0.00%		✓
Database Development	5/20/14		5/26/14		5	0.00%	Developer	✓

# Assign A Resource To Multiple Tasks At Once

- Go to Clarity Gantt > check the tasks > click the **Assign Resources** icon > select the resource(s) you want to assign

Project: A Test Project - Gantt

Filter: System Default

Task

Task	Start	B...	Fi
Initiation	2/10/16		12
<input checked="" type="checkbox"/> Test Task 1	2/18/16		2
<input checked="" type="checkbox"/> Test Task 2	2/18/16		2
Child 2	2/10/16		12
Grandchild 1	2/10/16		12
test	2/10/16		12
Test Project	12/10/15		2
Initiation Phase	12/10/15		12
Planning Phase	12/10/15		12
Define Scope Change and C	12/10/15		12
Define Resource Plan	12/17/15		12

Project: A Test Project - Assign Resources

Tasks

Test Task 1  
Test Task 2

Filter: System Default

Resource/Role Name

Resource/Role ID

Resource OBS

Resource OBS - Filter Mode

Project Role

Filter Show All Save Filter Clear

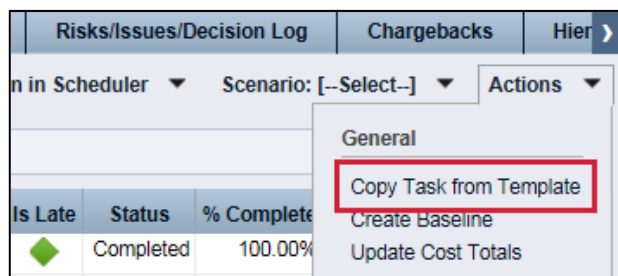
	Resource/Role	Resource/Role ID	Project Role
<input type="checkbox"/>	Benson, Bradley	bbenson	Business Analyst
<input type="checkbox"/>	Bishop, Mike	bishopm	Project Manager
<input type="checkbox"/>	Chouhan, Vipin	vchouhan	Developer
<input type="checkbox"/>	Scarlato, Jennifer	jscarlato	Architect

Assign Assign and Select More Return

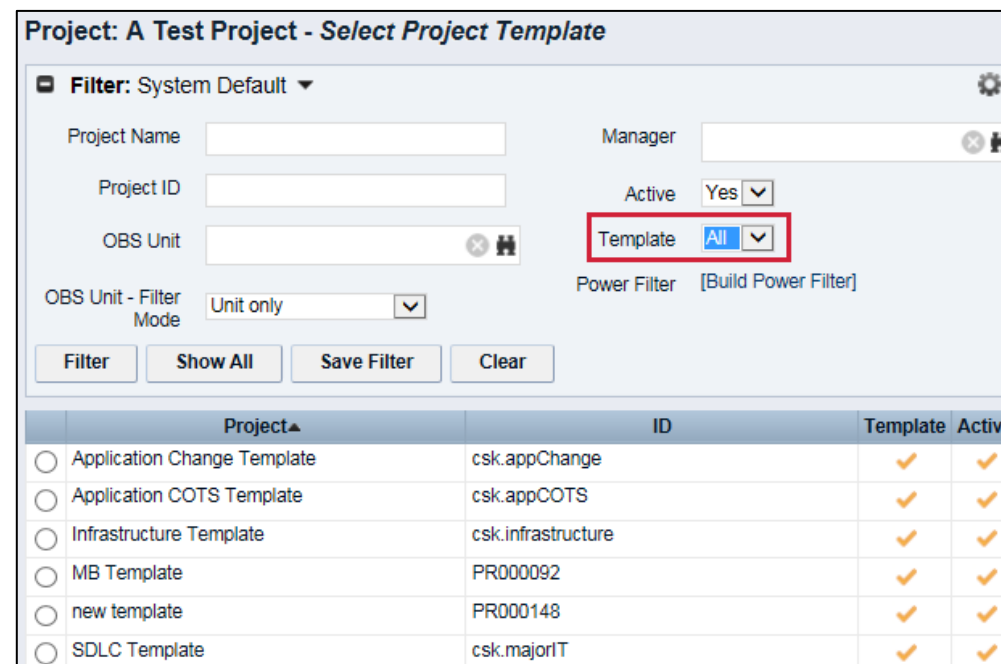
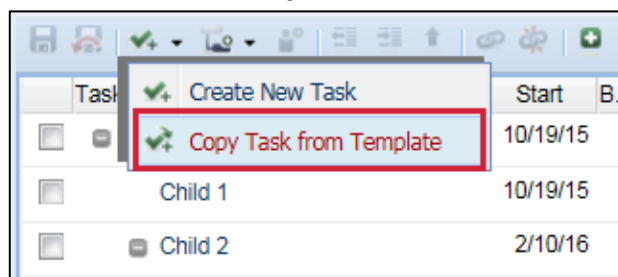
# Copy Tasks From A Template Or Another Project

- Easily copy tasks from a Template or even another project. Go to Project > Tasks tab > Actions Menu > Copy Task from Template > Adjust Template filter accordingly

## Tasks Tab



## Clarity





# Add Resources Using “Add/Update By OBS”

- Add resources to a project by OBS by going to the Project > Team > Add/Update by OBS



**Project: A Test Project - Team - Staff**

**Filter:** System Default ▼


<input type="checkbox"/>		Resource/Role▲	Project Role	Primary
<input type="checkbox"/>		Benson, Bradley	Business Analyst	
<input type="checkbox"/>		Bishop, Mike	Project Manager	
<input type="checkbox"/>		Borruso, Tony	Test Engineer	
<input type="checkbox"/>		Chouhan, Vipin	Developer	
<input type="checkbox"/>		Scarlato, Jennifer	Architect	
<b>Total</b>				


**Investment: : A Test Project - Add/Update by OBS**

**General**

OBS Unit: Financial Department:Rego Consulting   ←

OBS Filter Mode: Unit and descendants ▼

Start Date:  Reset to Match Investment Start Date ☒ ←

Finish Date:  Reset to Match Investment Finish Date ☒ ←

Default Allocation %:  ←







Update currently assigned OBS members ☒ ←

Add new OBS members ☒ ←

**Existing Allocation Segments**

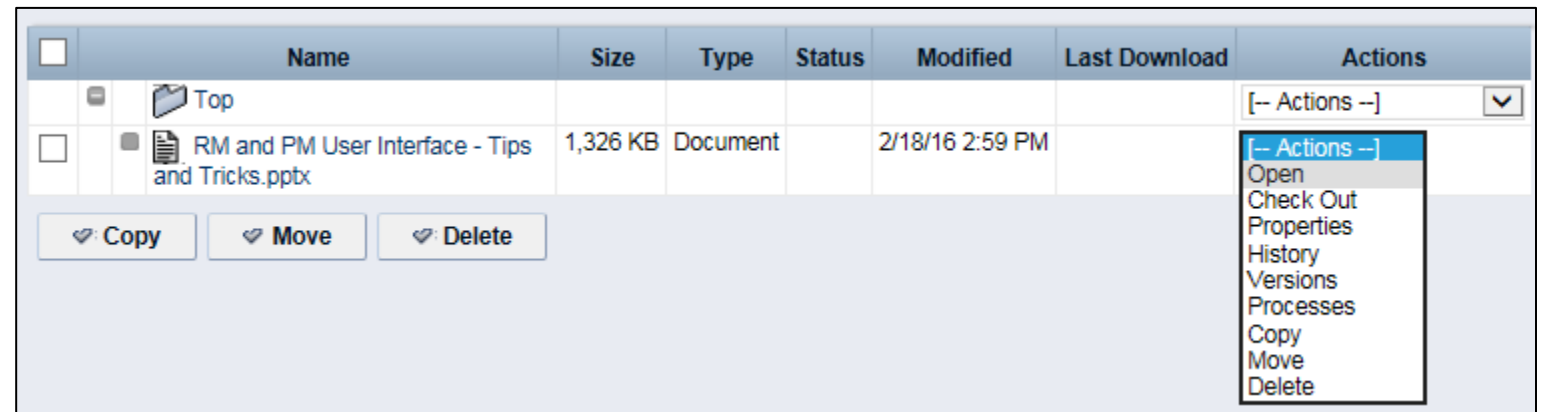
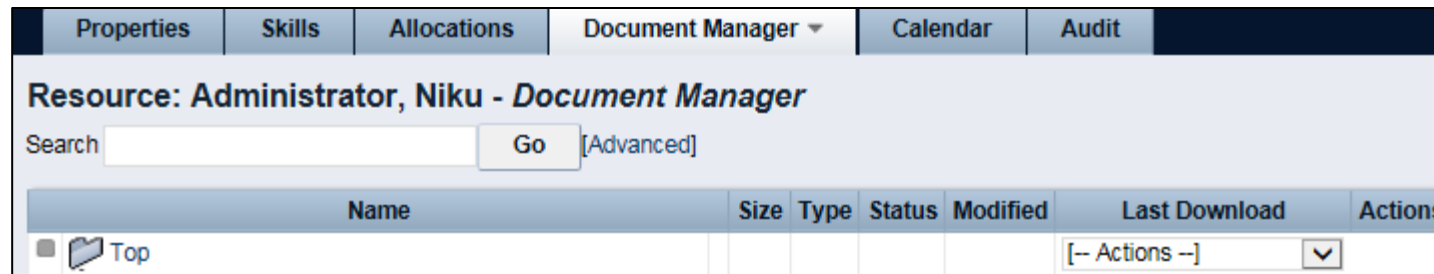
Clear existing allocation segments ☐ ( Select to clear all allocation segments for all OBS members )

**New Allocation Segments**

<input type="checkbox"/>	Start	Finish	% Allocation
<input type="checkbox"/>	10/19/2015	12/31/2015	100.00%
<input type="checkbox"/>	1/1/2016 	2/29/2016 	25.00%
<input type="checkbox"/>	3/1/2016 	6/30/2016 	75.00%
<input type="checkbox"/>	7/1/2016	2/24/2017	100.00%
<input type="checkbox"/>			

# Resource Document Manager

- Document Manager on the Resource Profile is personal document storage for the resource
- Allows for checking out and version control



# Add Actuals To The Resource Workloads Portlet

- Easily compare Availability, Allocations, Actuals and ETCs across all Projects by Resource or OBS
- Change from a “Column Graph” to “Number” and add the desired fields to the “virtual” Allocation field

Resource Views: Workloads													
Resource Workloads													
Resource▲	Resource ID	Primary Role		Allocation									
				Sep 15	Oct 15	Nov 15	Dec 15	Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16
America, Captain	captain_america	Developer	Availability Rate	176.00	176.00	168.00	184.00	168.00	168.00	184.00	168.00	176.00	176.00
			Allocation	1,320.00	1,320.00	1,136.00	1,128.00	1,344.00	1,336.00	1,288.00	1,048.00	704.00	704.00
			Actuals	126.00	105.00	25.00							
			ETC			11,082.00	184.00	248.46	248.46	272.12	248.46	260.29	260.29
Ayala, Juan	jayala	Network Engineer	Availability Rate	176.00	176.00	168.00	184.00	168.00	168.00	184.00	168.00	176.00	176.00
			Allocation	457.60	457.60	436.80	502.40	436.80	436.80	478.40	260.80	105.60	105.60
			Actuals	135.00	112.00	30.00							
			ETC	56.00	136.00	43.20	27.60	25.20	25.20	27.60	25.20	26.40	26.40
Almeida, Joe	jalmeida		Availability Rate	176.00	176.00	168.00	184.00	168.00	168.00	184.00	168.00	176.00	176.00
			Allocation	704.00	704.00	616.00	576.00	504.00	504.00	552.00	432.00	352.00	352.00
			Actuals										
			ETC	48.00									

# Update Resource Management Data In A Grid

- Save time and update Allocations right in a grid portlet for your entire team
- Go to the Weekly Detail portlet and click the cell to update
- Save your changes

Workloads

Capacity

Allocations

Booking Status

Unfilled Roles

Aggregation

Resource Views: Allocations

Scenario: [--Select--]

Weekly Detail

		Resource▲			Investment Role	Investment		Allocation									
								2/15/16	2/22/16	2/29/16	3/7/16	3/14/16	3/21/16	3/28/16	4/4/16	4/11/16	4/18/16
		Admin, PMO				Server Farm	Allocation Resource Availability	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
		Admin, Rego				ADVS Cemetery Memorial Site - 15950 N Lockett	Allocation Resource Availability	40.00	20	20	20	20	20	20	20	20	8.00
								40.00	40	40	40	40	40	40	40	40	40.00

# Adjust Work Effort in TSV

- Your Portlet > Options > Configure > List Column Section > Options > Work Effort Unit of Measure
- If an update is made in one option (FTE) it will be translated into another value if adjusted

General List Column Section List Filter Section

Portlet: Role Capacity - List Options

Display Options

Secondary Value Display ☐ Mouseover only ☒ Mouseover and redline text

Work Effort Unit of Measure ☒ FTE

System Default  
Hours  
Days  
FTE  
% Availability

Save Save And Return Return

# Time Slice Extension

- **In the Out of the Box configuration the date ranges are as follows:**
  - 28 Daily - One week in the past, the current day and 3 weeks in the future
  - 16 Weekly - 2 weeks in the past, the current week and 13 weeks in the future
  - 36 Monthly - 4 quarters in the past, the current quarter and 7 quarters in the future
  - Year, Quarter and Monthly periods all use monthly slices
- **With the extension, the new internal time slice ranges will be as follows:**
  - 42 Daily - 7 days in the past, the current day and 4 weeks in the future
  - 45 Weekly - 4 weeks in the past, the current week and 40 weeks in the future
  - 51 Monthly - 4 quarters in the past, the current quarter and 12 quarters in the future
  - Year, Quarter and Monthly periods all use monthly slices
- This is enabled via a simple .xml file provided by CA Support. On Demand customers are able to open a ticket and have it installed. On Premise open a ticket to receive the .xml file



# Questions?



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Let Rego be your guide.

# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- 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



Let us know how we can improve!  
Don't forget to fill out the class survey.



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