



*rego***U**niversity 2019

SAN DIEGO

Project Management |
OOTB Introduction
Your Guide: Robby Elliott and Mindy Calderon

Introductions

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



Agenda

- Introduction – what is a project?
- Managing Projects using the New UX
 - Project Tiles and List Views
 - Tasks vs Task List
 - Assignments
 - Status Reports
 - Optional Sub-Objects:
- Classic Project Management:
 - Project Teams
 - Gantt and Task Management
 - Financials
 - Other Sub-Objects

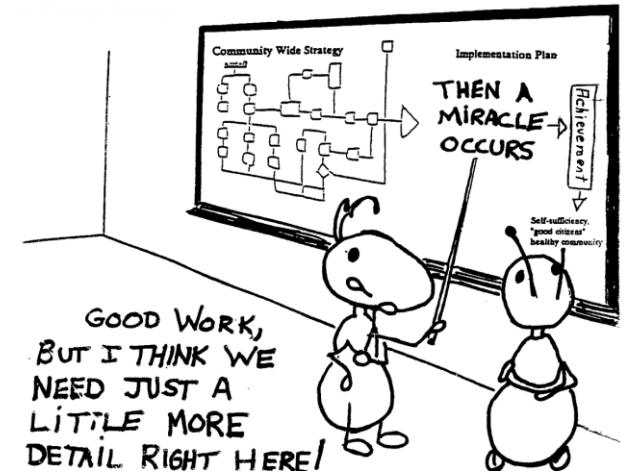
Part I: Introduction



Let Rego be your guide.

Clarity Project Management

- Projects are temporary endeavors undertaken to create a unique product or service
 - Key elements are tasks and staff
 - Tasks define project work
 - Staff are the resources who perform tasks
 - Document and manage Risks, Issues and Change Requests
- Top Project Constraints are time, budget, and resources
 - Clarity lets you manage each constraint
 - Determine project schedule
 - Determine cost based on resource estimated planned work and actual hours (Timesheets)
- Clarity has the flexibility to manage your project throughout the project life cycle, adapting to changes, risks and issues proactively to minimize the impact to the project constraints
- To manage detailed project schedules on a daily basis.
 - Use Clarity Autoschedule, Open Workbench (OWB) or MS Project (MSP)



Part II: Managing Projects in the New UX



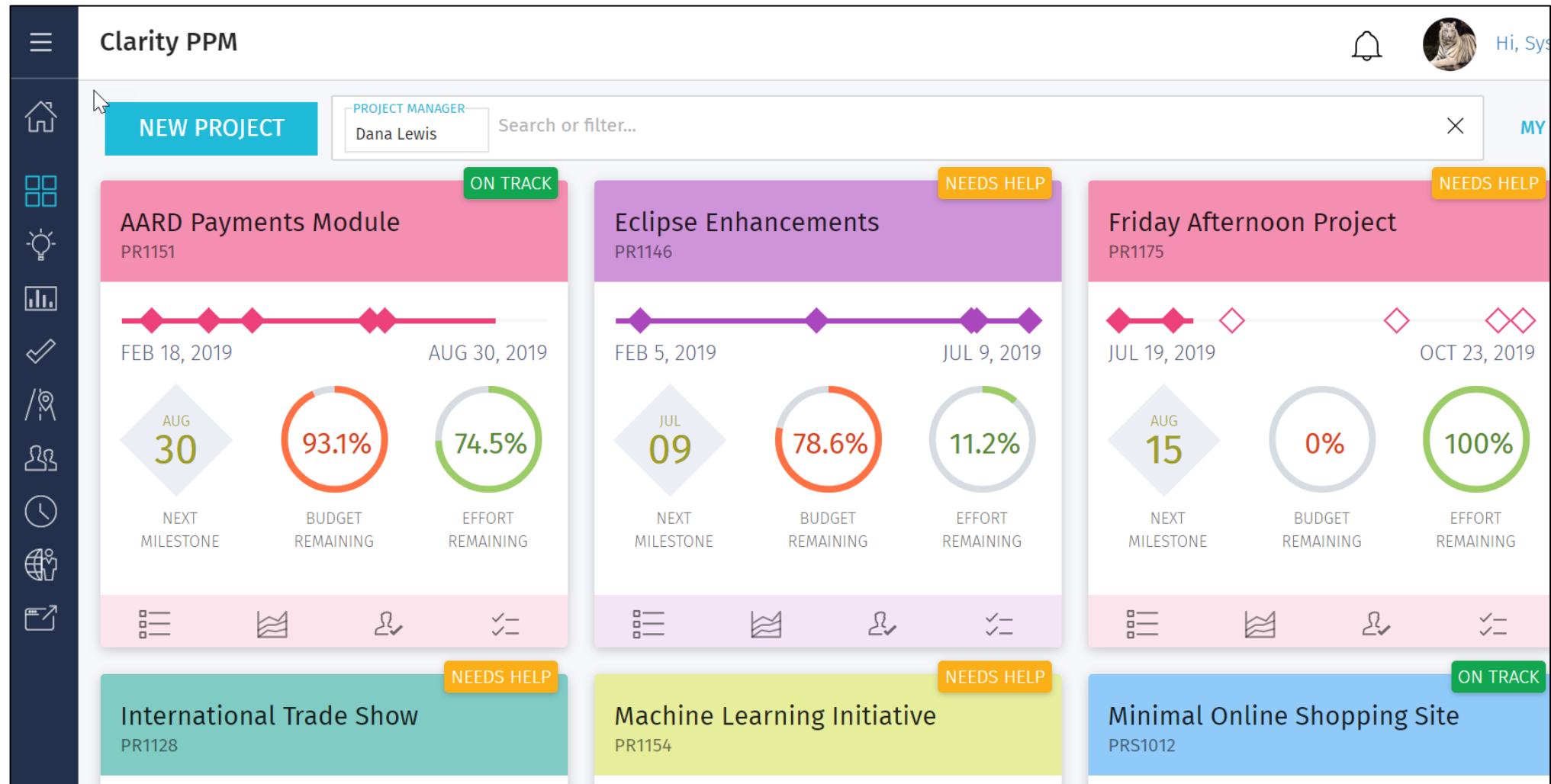
Let Rego be your guide.

Blueprints in the New UX

- Blueprints determine the tabs, fields and configuration of a project.
- Different projects may have different Blueprints applied, giving each project a different look and feel.

The screenshot displays the 'Clarity PPM' interface for a 'Standard Project - Custom'. The top navigation bar includes a hamburger menu, a back arrow, and tabs for 'DETAILS', 'VISUALS', and 'MODULES'. The 'DETAILS' tab is active. On the right, there's a notification bell, a user profile 'SG' with 'Hi, Sara', and a date 'Published: Sep 18, 2019' next to an 'EDIT' button. A left sidebar contains icons for home, grid, charts, lightbulb, bar chart, checkmark, location pin, people, person with plus, clock, and a globe icon which is highlighted with a red box. The main content area is titled 'PROJECT SUMMARY' and contains several input fields: 'PROJECT NAME *', 'PROJECT ID *', 'START *', 'FINISH *', 'PROJECT TYPE', 'WORK STATUS', 'COST TYPE', 'DESCRIPTION', and 'OBJECTIVE'.

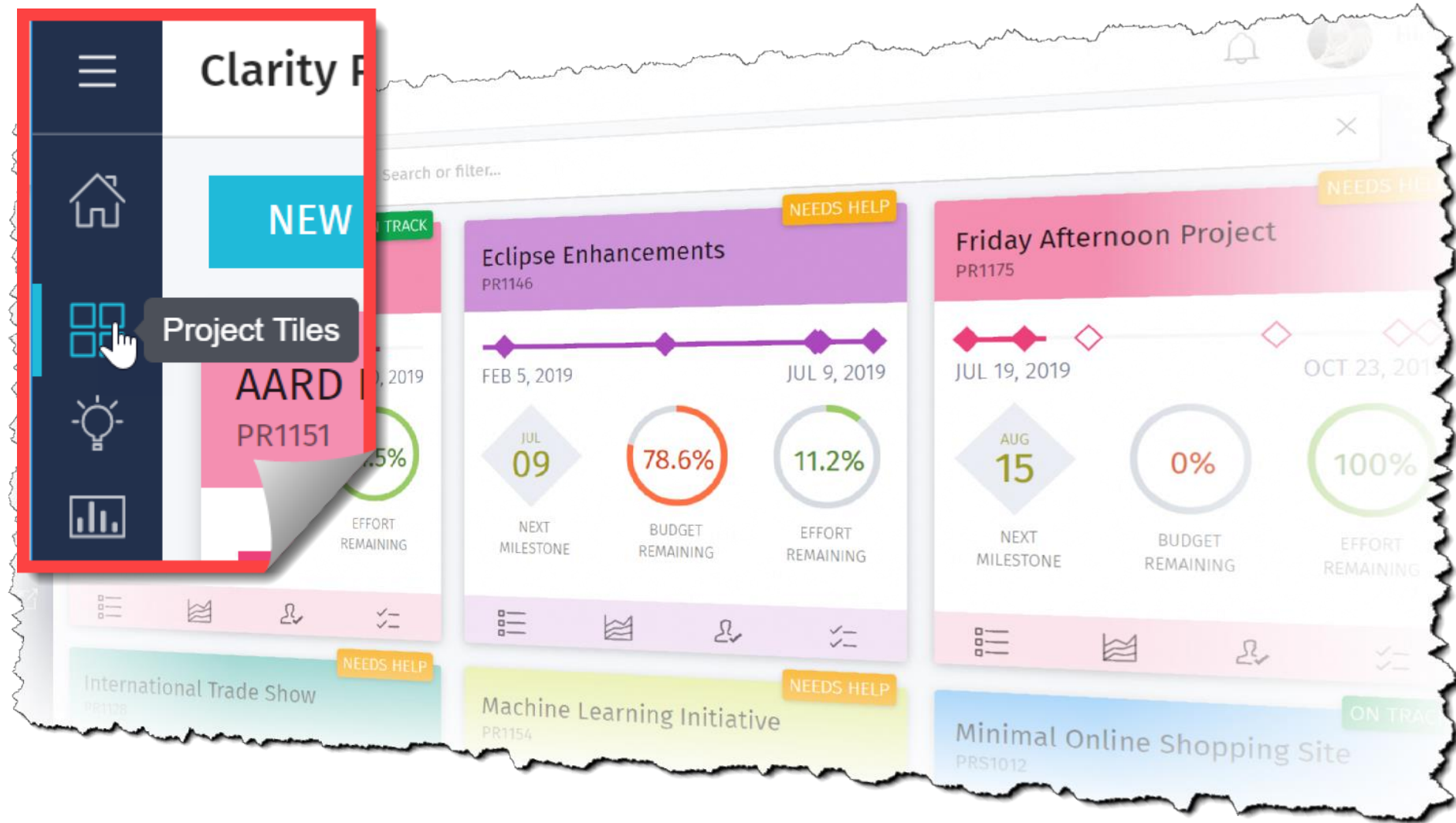
Project Tiles View



Accessing Projects from the Tiles View

For users with Project Management rights, this is often your home page: the project tiles. However, it is a simple click to access from other parts of the screen.

You can click on the data in the tile to go to the project or leverage the “module shortcuts” at the bottom of the tile for a shortcut to that project page,



Project Grid View (1)

- Beginning in 15.6.1, a new project link is available in the Left Navigation menu that displays projects in a grid view, similar to the Project List in Classic.
- The common New UX grid view is utilized here, that allows for filtering on any project attribute, saved filters, saved views, sorting, grouping, etc.
- Security Rights are associated with each View:
 - Project Management - Tiles Navigate: Allows user access to the project management **Tiles** page in the new user experience. The user will only be able to view information for projects to which the user has access.
 - Project Management – Navigate: Allows user access to the project management (**Grid**) pages in the new user experience. The user will only be able to view information for projects to which the user has access.

Project Grid View (2)

Clarity PPM **Projects**

NEW FROM TEMPLATE

VIEW UNSAVED IT Master View

Group By

*Name ↑	*ID	Manager	*Start	*Finish	Planned Capital Cost	Planned Cost	Planned Operating Cost
AC Core Digital Rollout (Used for Roadmaps Class)	PR1231	Garvey, Sara	Jan 01 2020	Dec 31 2020	87,654	142,654	55,000
Airport Access Security (Used for Roadmaps Class)	PR1232	Garvey, Sara	Jan 29 2020	Sep 01 2020	500,000	2,000,000	1,500,000
Client Services Datamart (Used for Roadmaps Class)	PR1233	Garvey, Sara	May 15 2020	May 26 2020	25,000	47,000	22,000
CRM Enhancements (Used for Roadmaps Class)	PR1234	Garvey, Sara	Apr 05 2020	Jul 09 2020	412,000	612,000	200,000
Maintain legacy purchasing system (Used for Roadmaps Class)	PR1236	Garvey, Sara	Sep 01 2020	May 26 2021	90,000	100,000	10,000
Mobile Advertising (Used for Roadmaps Class)	PR1237	Garvey, Sara	Aug 22 2020	Jan 14 2021	125,000	145,000	20,000
Mobile Time and Approvals (Used for Roadmaps Class)	PR1238	Garvey, Sara	Dec 01 2019	May 20 2020	300,000	500,000	200,000
Online to Offline Market (Used for Roadmaps Class)	PR1239	Garvey, Sara	May 19 2020	Jul 26 2021	55,123	120,147	65,024
Security Compliance (Used for Roadmaps Class)	PR1240	Garvey, Sara	Feb 15 2020	Jul 20 2020	200,800	600,800	400,000
Web Based Trading (Used for Roadmaps Class)	PR1241	Garvey, Sara	Jul 28 2020	Oct 18 2021	12,800	39,520	26,720

User Configurable Details Pane

- On Projects, Ideas or Custom Investments for which a user has edit rights, the user may update grid data via a configurable Details pane/panel. Users themselves may determine which fields appear on the panel, and panel configurations can be saved to a view.
- Note that you must first click on an item in the list before the Details Pane will appear.

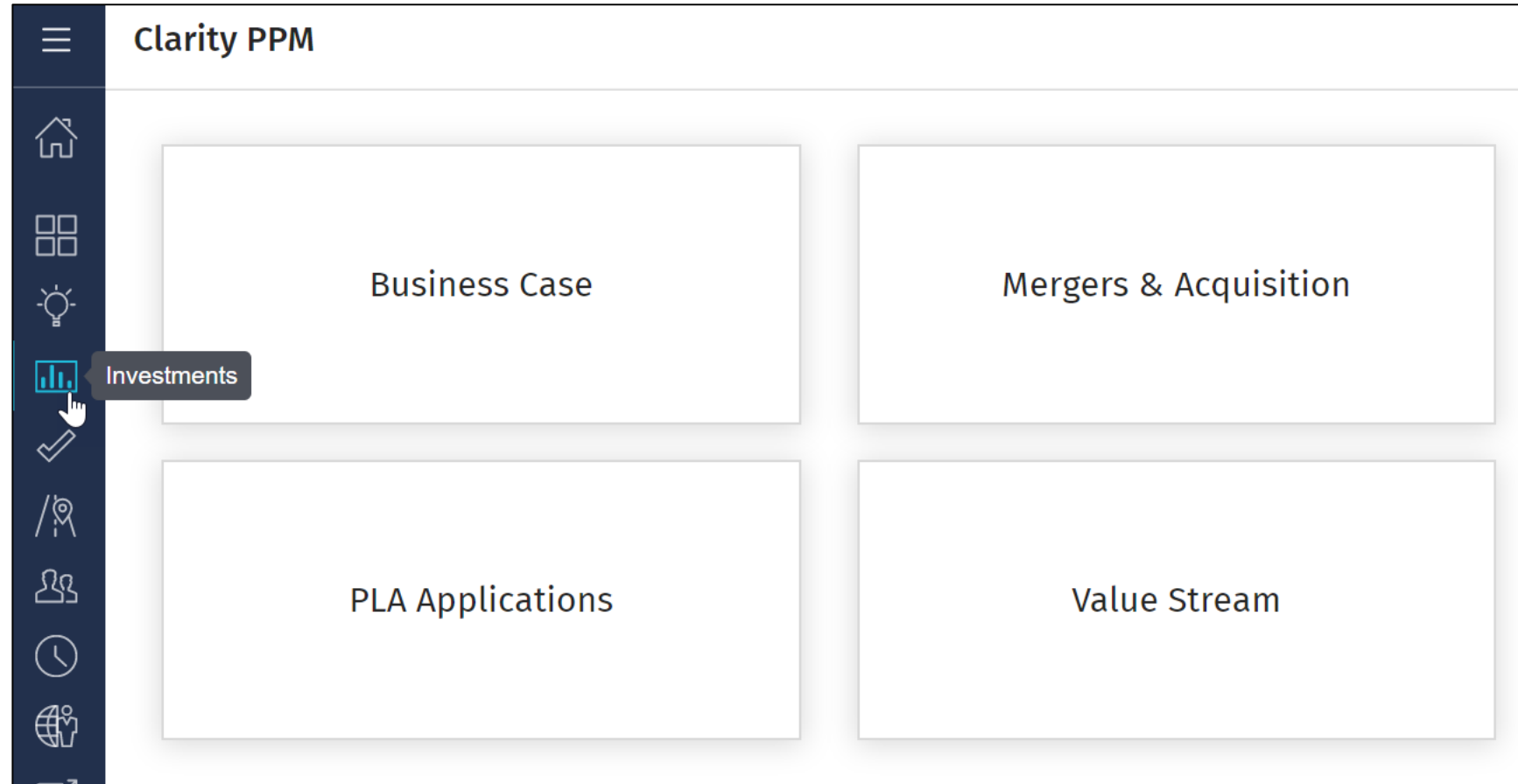
The first screenshot shows the 'Clarity PPM' interface with the 'Projects' list. The 'DETAILS' button is highlighted in the left sidebar. The second screenshot shows the 'Details' pane for a selected project, with the 'CONFIGURE' button highlighted. The third screenshot shows the 'Configure' dialog, which allows users to select which fields appear in the details pane.

*Name↑	Blueprint	*ID	Manager	*Start
AC Core Digital Rollout (Used for Roadmaps Class)	Standard Project v2	PR1231	Garvey, Sara	Jan 2020
Airport Access Security (Used for Roadmaps Class)	Standard Project v2	PR1232	Garvey, Sara	Jan 2020
Client Services Datamart (Used for Roadmaps Class)	Standard Project v2	PR1233	Garvey, Sara	May 2020
CRM Enhancements (Used for Roadmaps Class)	Standard Project v2	PR1234	Garvey, Sara	Apr 2020
Maintain legacy purchasing system (Used for Roadmaps Class)	Standard Project v2	PR1236	Garvey, Sara	Sep 2020
Mobile Advertising (Used for Roadmaps Class)	Standard Project v2	PR1237	Garvey, Sara	Aug 22
Mobile Time and Approvals (Used for Roadmaps Class)	Standard Project v2	PR1238	Garvey, Sara	Dec 01
Online to Offline Market (Used for Roadmaps Class)	Standard Project v2	PR1239	Garvey, Sara	May 19
Security Compliance (Used for Roadmaps Class)	Standard Project v2	PR1240	Garvey, Sara	Feb 15
Web Based Trading (Used for Roadmaps Class)	Standard Project v2	PR1241	Garvey, Sara	Jul 28

The 'Configure' dialog shows the following fields:

- NAME *
- % COMPLETE
- % COMPLETE CALCULATION ... *
- ACTIVE
- ACTUALS
- ACTUALS SUM FOR LABOR RES...
- ACWP
- ALIGNMENT
- INVESTMENT ID *
- MANAGER
- START *
- FINISH *

Custom Investments



The investments list will take you to a list view as well as a Kanban-like experience. This configurable list of project type boxes will pre-filter your projects by that type.

The Configurable Grid View

Clarity PPM

Business Case
business_case

VIEW UNSAVED

Search...

Export to CSV

Filter Board View Grid View

Group By

Configure the View

Pick your Columns

*Name↑	*ID	Manager	Work Progr...	Alignment	Work Stage	*Progress	*Start	*Status	*F
Clarity Implementation	000-03	Fleming, Nicole	Not Started	12	Business Case	Started	Dec 13 2018	Approved	
klsdm'lkdmf'l	000-06	Lewis, Dana		22	Development	Not Started	Jun 13 2019	Unapproved	
Mobile API Enhancements	000-05	Administrator...		45	Demand Capt...	Not Started	Mar	Approved	Mar
Mobile Payment App commerce pla...	000-04	Lewis, Dana	Not Started	56	Business Case	Started	Dec	Approved	Dec
Network Monitoring Upgrade	000-01	Lewis, Dana	Not Started	100	Business Case	Not Started	Dec 13 2018	Unapproved	Dec
New Online Application	000-02	Lewis, Dana	Started	87	Business Case	Not Started	Dec 13 2018	Unapproved	Dec

You can configure your view and easily export to csv.

The Investment grid - Summary Details of an Investment

By selecting a single investment, you will see an additional menu appear: the Details View.

The screenshot displays the 'Investment grid' interface. On the left, a list of investments is shown with columns for Name, Amount, and Work Stage. The 'Network Monitoring Upgrade' is selected. A details view is open for this investment, showing fields for Name, Investment ID, Manager, Work Progress, Work Stage, and Progress. A 'CONFIGURE' button is visible in the details view. A red box highlights the 'CONFIGURE' button and a red arrow points to the 'DETAILS' tab in the grid view, with the text 'Configure the columns available in the grid view'.

*Name ↑	Amount	Work Stage
Clarity Implementation		
Mobile API Enhancement		
Mobile Payment App com	12	Business
Network Monitoring Upgr	45	Demand
New Online Application	56	Business Ca
New Safety Monitoring Sy	100	Business Ca
	87	Business Ca
	22	Developmen

Work Stage	*Progress	*Start	*Status	*F
Business Case	Started	Dec	ed	D
Demand Capt...	Not Started	Mar	ed	M
Business Case	Started	Dec	oved	D
Business Case	Not Started	Dec	oved	D
Business Case	Not Started	Dec	oved	D
Development	Not Started	Jun 13 2019	Unapproved	Jun

DETAILS

Configure the columns available in the grid view

NAME *

Network Monitoring Upgrade

INVESTMENT ID

000-01

MANAGER

Lewis, Dana

WORK PROGRESS

Not Started

WORK STAGE

Business Case

PROGRESS *

You can see the details of your project/investment as well as configure the data points you are displaying.

Details Tab

- The Details tab displays the project attributes.
- Details tabs can display different data in different Blueprints.

Clarity PPM

AARD Payments Module
PR1151

ON TRACK

Hi, System

DETAILS STATUS ASSIGNMENTS TASK LIST TASKS RISKS ISSUES CHANGES CONVERSATIONS

Milestone Status Bar

PROJECT SUMMARY

PROJECT NAME *	PROJECT ID	SCHEDULER FORMAT	WORK STATUS
AARD Payments Module	PR1151	Microsoft Project	Requested
START *	FINISH *	PROJECT TYPE	STATUS REPORTING
Feb 18 2019	Aug 30 2019	Major Project	Not Required
% COMPLETE			
0%			
DEPARTMENT OBS			
Corporate > IT > Business Operations			
OBJECTIVE			

Staff Tab

- Staff Roles and Resources to the Project
- Update Default and Time-Scaled Allocations

Clarity PPM Camelot Beacons Of Knowledge Platform PR000676

ON TRACK

DETAILS TASKS **STAFF** ASSIGNMENTS SUB-PROJECTS STATUS REPORT ISSUES RISKS FINANCIALS LINKS

Group By

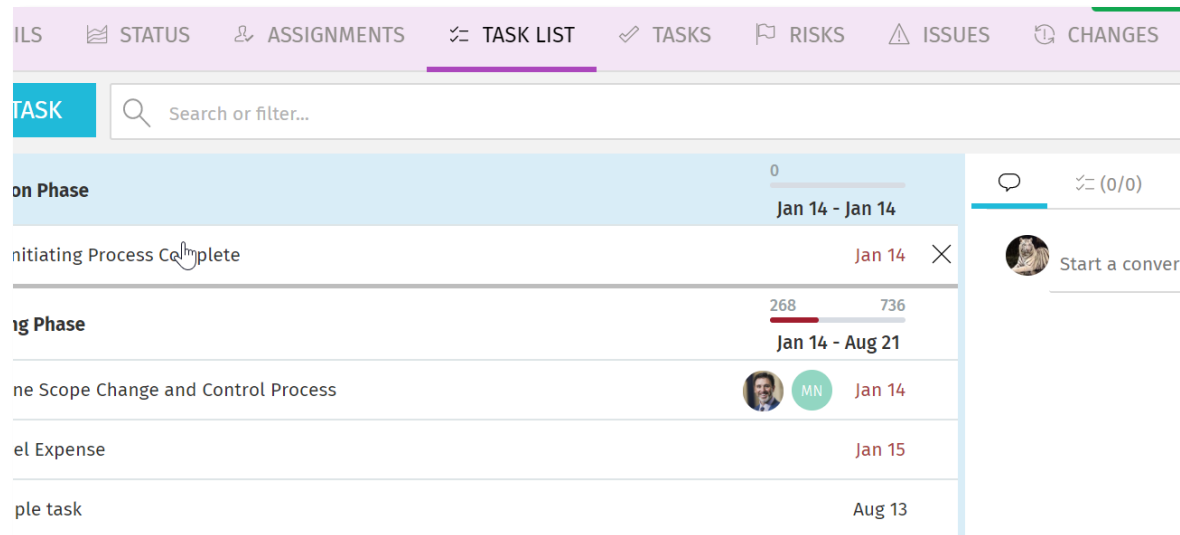
VIEW UNSAVED Search...

							Jun 11 - Jun 17	Jun 18 - Jun 24
*Resource ↑	Role	*Booking Status	Open For ...	Allocation	Actuals	ETC	Allocations	Allocations
A-Team		Soft	✓	18,032	0	16	80	80
CM Expense		Hard	✓		0	0		
DBA	DBA	Hard	✓	9,016	0	200	40	40
Network Engineer	Network E...	Hard	✓	9,016	0	200	40	40
Orozco, Meme	CM Social ...	Hard	✓	451	0	0	2	2
Project Manager	Project Ma...	Soft	✓	9,016	0	192	40	40
Samsa, Gregor	CM Idea M...	Soft	✓	451	0	0	2	2
Storage Architect	Storage Ar...	Soft	✓	9,016	0	200	40	40

Project Task List and Tasks Tabs

• Task List

- Conversational approach
- Shows “indents” of tasks
- Easy Access to Classic Gantt, Open Workbench, and MSP



• Tasks

- Similar treatment as in Roadmaps
- Allows for group-bys
- Supports board, timeline and grid capabilities

Group By						
Phase Name	*Name	*Start ↑	*Finish	Status	Task Owner	Milestone
Planning Phase	Risk Response and Mitigati...	Jan 30 2019	Feb 08 2019	Started	Rubio, Sam	
Planning Phase	Identify Storage Requirem...	Feb 11 2019	Feb 22 2019	Not Started	Fowler, Ray	
Planning Phase	Identify Infrastructure Req...	Feb 25 2019	Mar 08 2019	Started	Cooper, Andy	
Planning Phase	Complete Project Plan	Mar 11 2019	May 31 2019	Started	Martin, Paul	
Planning Phase	Planning Phase Gate Comp...	Mar 22 2019	Mar 22 2019	Not Started	Martin, Paul	✓
	Design Phase	Mar 25 2019	Aug 13 2019	Started		
Design Phase	Requirements Definition	Mar 25 2019	Jun 17 2019	Not Started	Davis, Drew	
Design Phase	Hardware Acquisition	Apr 01 2019	Jun 18 2019	Started	Carmen, Ed	
Design Phase	Design Phase Gate Complete	Jun 18 2019	Jun 18 2019	Not Started	Fowler, Ray	✓
Design Phase	example	Jun 26 2019	Jun 26 2019	Completed		
	Construction Phase	Jul 09 2019	Sep 06 2019	Not Started		
Construction ...	Database Development	Jul 09 2019	Jul 22 2019	Not Started	Durand, Diane	

The Assignments Tab

Group By things like Resources, tasks, phases or other values you have displayed

ON TRACK

DETAILS STATUS ASSIGNMENTS TASK LIST TASKS RISKS ISSUES CHANGES

VIEW UNS

Standa

Group By

				Totals	2019-01	2019-02	2019-03
*Task	*Resource	*Start ↑	*Finish	ETC	ETC	ETC	ETC
Define Scope Change and...	Martin, Paul	Jan 14 2019	Jan 14 2019	0	0	0	0
Define Scope Change and...	Newburg, Mary	Jan 01 2019	May 31 2019	57	5	100	200
Travel Expense	Travel	Jan 15 2019	Jan 15 2019	12,000	12,000	0	0
Define Resource Plan	Martin, Paul	Jan 16 2019	Sep 30 2019	9	0	0	0
Risk Response and Mitig...	Morris, Tom	Jan 30 2019	Sep 30 2019	17	0	14	20
Risk Response and Mitig...	Kingsley, Art	Jan 01 2019	Sep 30 2019	995	995	995	995


You can adjust and assign ETC's by task and person and by period in here. Just tab through and it will autosave. Filter, sort, and group by to find the ETC's you need to update

The Financials Tab


- Create and edit Cost and Budget Plans

Clarity PPM Camelot Beacons Of Knowledge Platform
PR000676

< ASSIGNMENTS SUB-PROJECTS STATUS REPORT ISSUES RISKS **FINANCIALS** LINKS

 **Sample Plan** PLAN OF RECORD ⋮

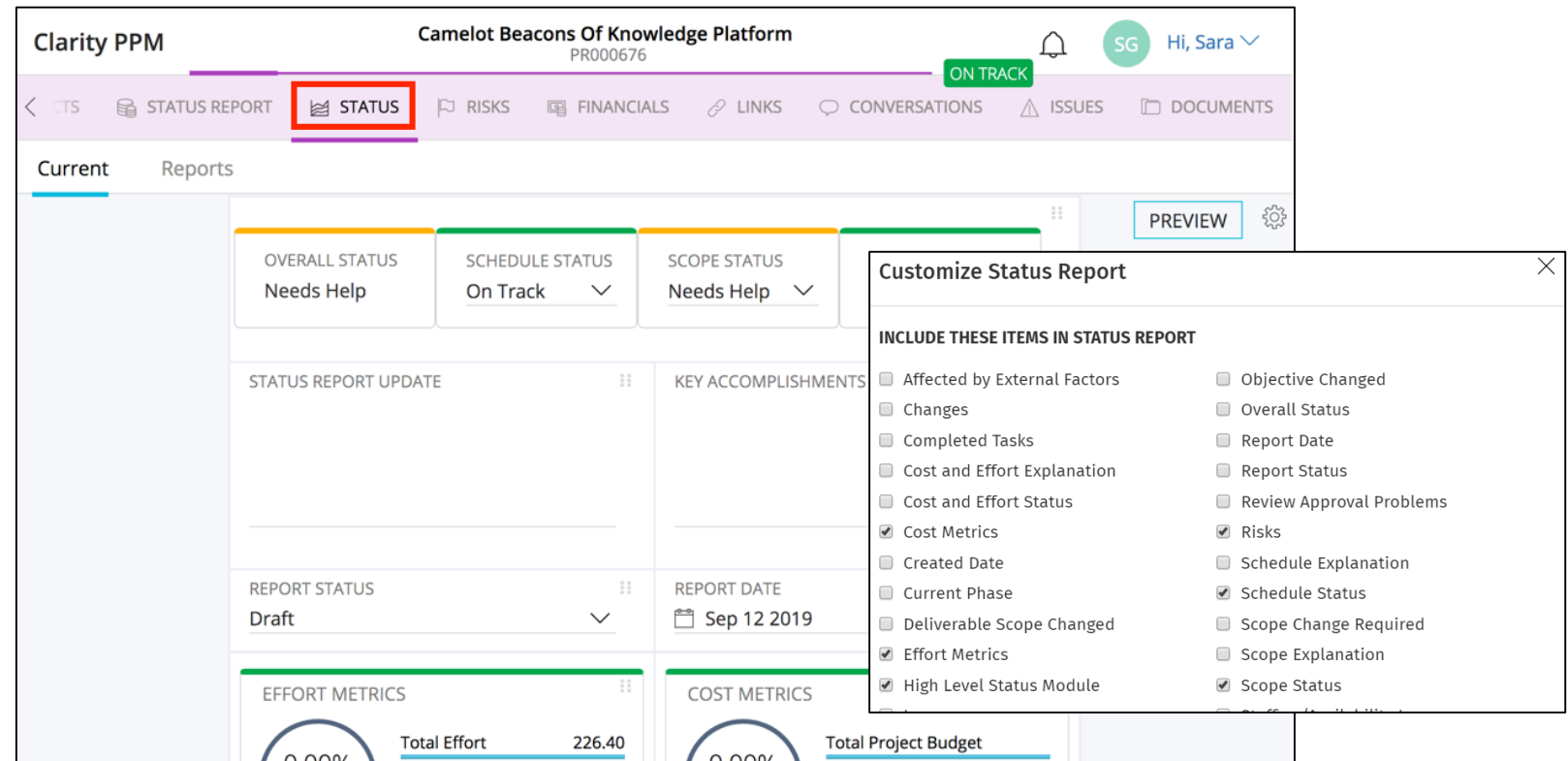
Group By

		NOV 1, 2015-NOV 30, 2015	DEC 1, 2015-DEC 31, 2015	JAN FY 2016
		PLANNED	PLANNED	PLANNED
 Cost T... ↑	Transact...	0	0	0
Capital	Contractor	0	0	0

The Status Tab and Status Report Tabs

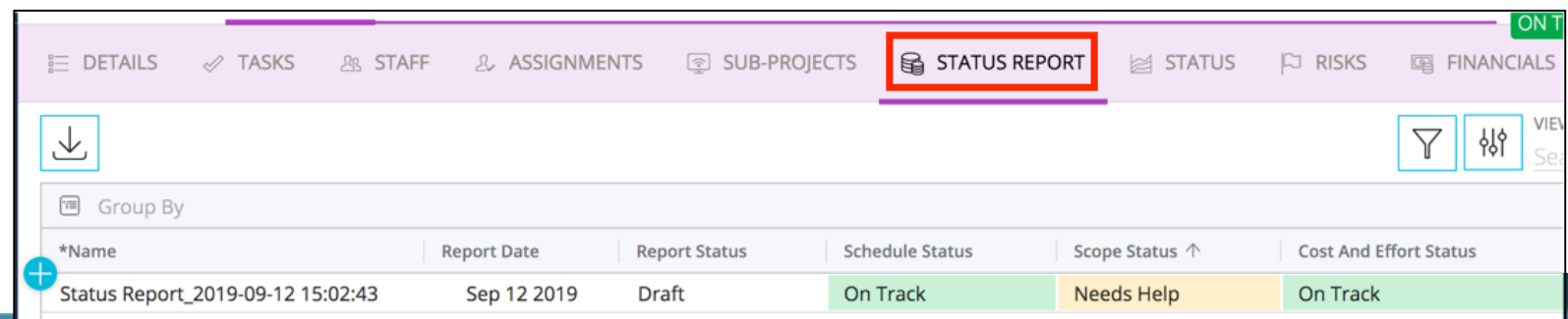
- Status Tab

- Customizable New UX Status Report
- Choose which sections to display



- Status Report Tab

- Classic Style Status Report
- Grid View Only



Risks, Issues, Changes Tabs

- Risks, Issues, and Changes are all available and their pages can be configured on the fly, exported to CSV files, grouped, filters, and sorted as needed.
- List View Only
- Utilize Saved views

DETAILS STATUS ASSIGNMENTS TASK LIST TASKS RISKS ISSUES CHANGES CONVERSATIONS

VIEW **UNSAVED** risk default

Group By

*Name ↑	Category T...	*Priority	Probability	Impact	Calculated ...	Is Above Th.
No budget	Funding	Low	Low	Low	Low	✓
Scope Change	Implementati...	Medium	High	Medium	High	✓
Sponsorship Risk	Sponsorship	Medium	Medium	Medium	Medium	✓

CONFIGURE

NAME *

Scope Change

CATEGORY TYPE

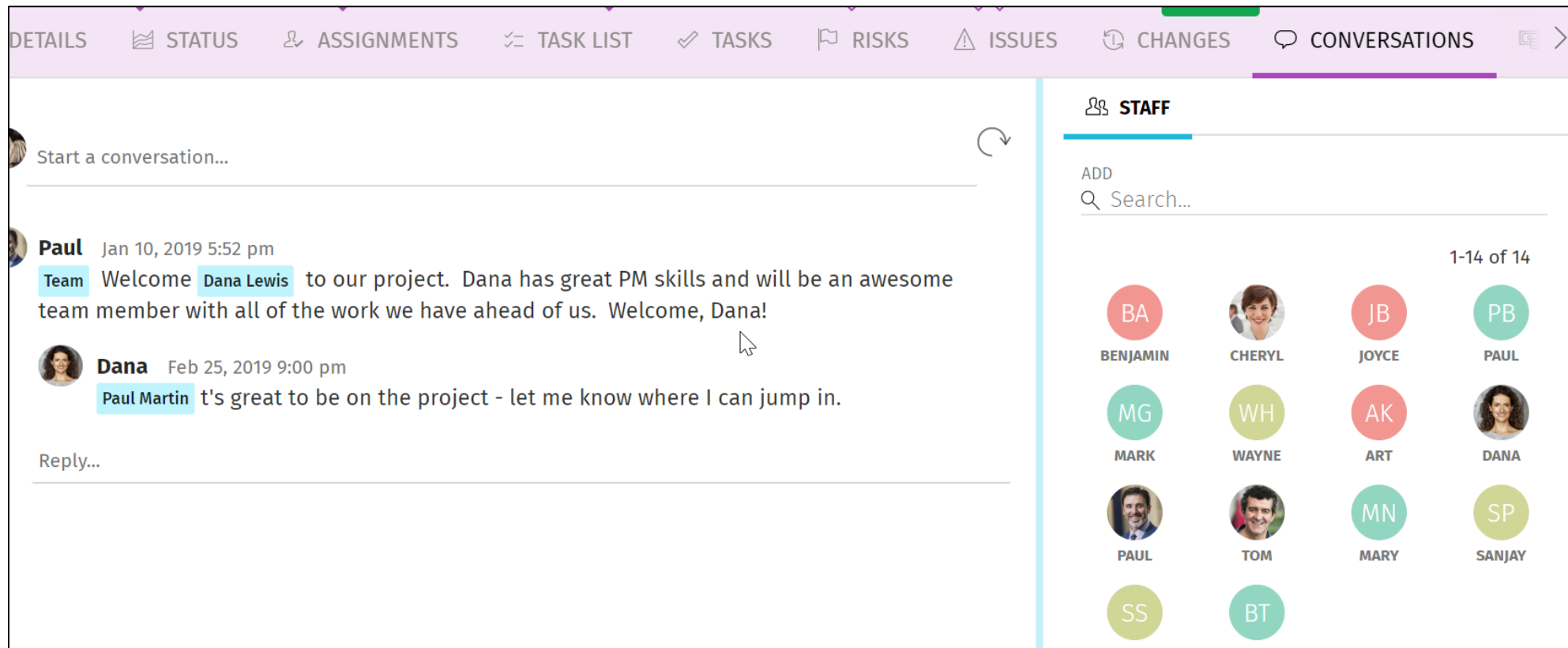
Implementation

PRIORITY *

Medium

Conversations Tab

- Conversations can bring the team together. This page allows for in-project chats and documents can be included.



Documents Tab

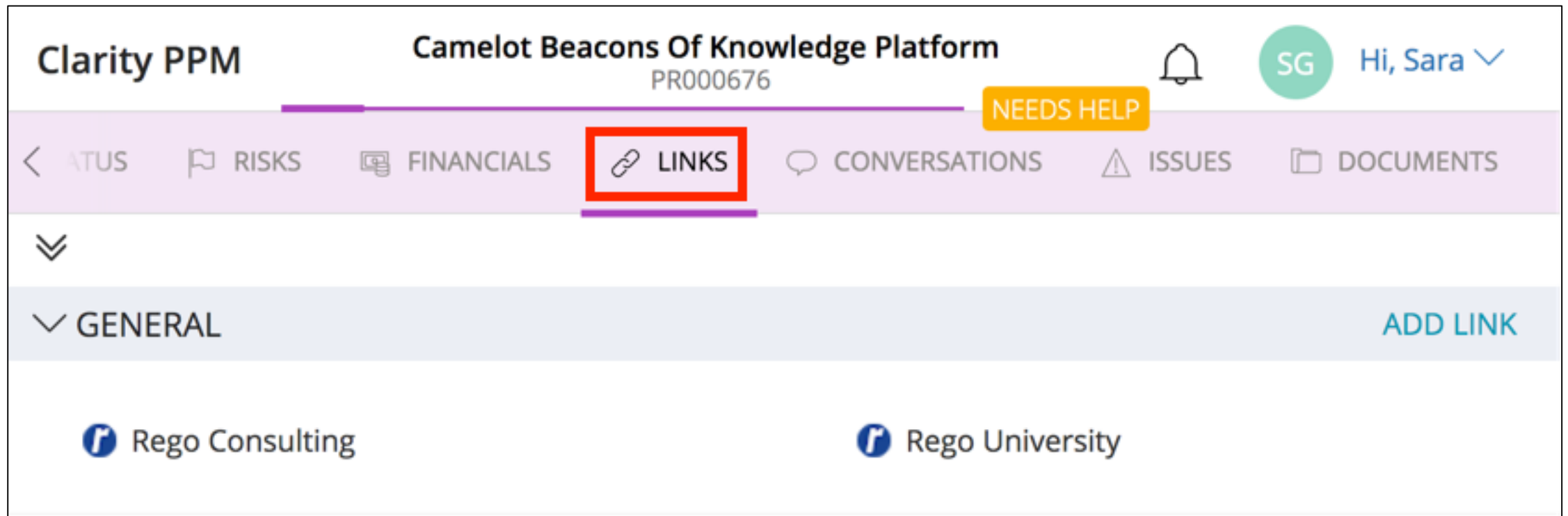
- Documents - can be stored, organized and searched for a specific project

The screenshot displays the 'DOCUMENTS' tab in a software interface. The top navigation bar includes icons and labels for 'FILE PERFORM...', 'AGILE CENTRAL', 'RISKS', 'ISSUES', 'CHANGES', 'CONVERSATIONS', 'STAFF', 'STATUS', and 'DOCUMENTS'. Below this, a 'Documents' section header is followed by a search bar labeled 'Search Documents' and icons for document upload and folder creation. A table lists documents with columns for 'NAME', 'OWNER', 'MODIFIED', 'SIZE', and 'TAGS'. One document is listed: 'Docs go here' owned by 'Dana Lewis', modified on 'Aug 2, 2019'. A green 'ON TRACK' badge is visible above the 'DOCUMENTS' tab.

NAME	OWNER	MODIFIED	SIZE	TAGS
Docs go here	Dana Lewis	Aug 2, 2019		

Links Tab

- Allows for the creation of Clarity and non-Clarity links.



Custom Subobjects and Channels

- Custom Subobjects may also be displayed as a tab within the Project.
- Channels can be used to access data in Classic, or other external systems.

Clarity PPM Camelot Beacons Of Knowledge Platform PR000676

NEEDS HELP

DETAILS TASKS STAFF ASSIGNMENTS **SUB-PROJECTS** STATUS REPORT

CLASSIC Clarity PPM

PROPERTIES TEAM TASKS RISKS/ISSUES/DECISION LOG PROCESSES DASHBOARD

Project: Covance Master Project - *Properties - Subprojects* Open in Scheduler

ACTIVE
Yes

FILTER SHOW ALL CLEAR

	Project ▲	ID	Count	Actuals	ETC	Total Effort	Percent Expended	Baseline	Status	Schedule	Read Only
<input type="checkbox"/>	Covance Sub Project 1	PR000557	0	0	0	0		0	◆		
<input type="checkbox"/>	Covance Sub Project 2	PR000558	0	0	0	0		0			
	Total		2	0	0	0	0.00%	0	◆		

Displaying 1 - 2 of 2

ADD REMOVE SET READ-ONLY SET READ/WRITE

Program Work Effort = Hours

Part III: The Classic Experience



Let Rego be your guide.

Project List View

Project List view displays all the projects to which the end user has access and is divided into two sections

- Click the + sign to Expand the Filter if it is collapsed by default
 - The top portion of the screen is a filter allowing you to search Clarity for items meeting specific criteria
 - The bottom portion of the screen is the list that displays the results of your filter criteria

The screenshot shows the 'Projects' interface. At the top, there is a 'Filter' section with various input fields and buttons. Below this is a table of projects. Annotations highlight key features:

- Shows/Hides the filter:** Points to the minus sign icon in the filter header.
- Filter:** Points to the filter section header.
- Click a heading to sort by that value:** Points to the 'Project' column header.
- Base Configuration – Project Security Groups:** Points to the 'Scheduler Format' column.
- Filter results display here:** Points to the table of project results.

Active	Investment ID	Project	Manager	Start	Finish	Scheduler Format
✓	PR000011	A Fantastic Project	Joshi, Navdeep	2/2/15	4/30/18	Microsoft Project
✓	PR000010	Anesthesia Delivery	Joshi, Navdeep	3/12/13	8/28/19	Workbench
✓	csk.appChange	Application Change Template		10/24/17	11/2/17	Microsoft Project
✓	csk.appCOTS	Application COTS Template		10/24/17	12/2/17	Microsoft Project
✓	csk.infrastructure	Infrastructure Deployment Template		10/24/17	11/27/17	Microsoft Project
✓	csk.majorIT	Major Project Template		10/24/17	2/12/18	Microsoft Project
✓	PR000017	New Master Project - Acme Migration	Bolin, Rod	2/6/17	1/1/19	Workbench
✓	PR000014	Online Application	Bolin, Rod	11/29/17	3/1/18	Workbench

Project Properties and Subpages

- PMs and users with the proper access rights may update project information on the various tabs, links, and subpages
- What's displayed in your instance may differ due to your configuration and security settings

The screenshot displays the 'Project Properties' interface. At the top, a navigation bar includes tabs: Dashboard, Properties (selected), Team, Tasks, Financial Plans, Chargebacks, Hierarchy, Risks/Issues/Changes, Collaboration, and Processes. Below this, a sub-navigation bar shows 'Main' (selected), Subprojects, Dependencies, Baseline, and Estimating. A dropdown menu for 'Properties' is open, showing options: General (selected), Admin & Finance, and Status Reports. To the right of the dropdown, a 'Links' section contains 'Access to this Project', 'Full View', 'Resource', and 'Group'. Further right, a 'Tabs' section is visible. The main content area is divided into two columns. The left column, under the 'General' tab, contains fields for Project ID (PR000020), Project Type (Major Project), Status (Unapproved), Charge Code ([--Select--]), and Progress (Not Started). The right column contains fields for Project Manager (McGuire, Noreen), Stage (Initiation), Goal ([--Select--]), and Priority (30). A 'Description' section at the bottom has a large text area. Red arrows point from labels 'Links', 'Subpages', and 'Tabs' to their respective elements in the interface.

Project Security

- Access to the project is controlled via Clarity Security Groups:
 - You may have read/write access or read only access to all projects
 - You may have read/write access to only the project you are designated as PM
- Security Groups in Base Configuration:
 - Project Creator
 - Project Editor, Scheduler
 - Book Resources to projects
 - Report access

The screenshot shows a web-based form for project configuration. The top navigation bar includes tabs: Dashboard, Properties (selected), Team, Tasks, Financial Plans, Chargebacks, Hierarchy, and Risks/Issues/Changes. Below the navigation bar, the breadcrumb trail reads: Project: Project Planning Software Training - Properties - Main - General. There are two buttons: 'Open in Scheduler' and 'Scenario: [--Select--]'. The form is divided into several sections:

- General** (marked with a star):
 - Project Name: Project Planning Software Training
 - Project ID: PR000020
 - Project Type: Major Project (dropdown)
 - Status: Unapproved (dropdown)
 - Charge Code: [--Select--] (dropdown)
 - Progress: Not Started (dropdown)
 - Project Manager: McGuire, Noreen (with user icon)
 - Stage: Initiation (with user icon)
 - Goal: [--Select--] (dropdown)
 - Priority: 30 (with a red error icon)
- Description**: A large text area for the project description.
- Schedule** (marked with a star):
 - Start Date: 1/29/2018 (with calendar icon)
 - Finish Date: 5/14/2018 (with calendar icon)
 - Baseline Start: (empty field)
 - Baseline Finish: (empty field)
- Status**:
 - Status Indicator: On Track (dropdown with a green diamond icon)
 - Status Comment: (large text area)

At the bottom of the form, there are three buttons: 'Save', 'Save And Return', and 'Return'.

Team Tab

- The *Team* tab (1) has an *Actions* drop-down (2) and a *Configure* (3) icon
- Use the *Team* tab to
 - Staff the project with roles and named resources
 - Manage booking status
 - Manage start and finish dates
 - Manage allocation for the project
- Click *Add* or *Add/Update by OBS* to staff the project team (4)

The screenshot shows the 'Team' tab selected in a software interface. The interface includes a top navigation bar with tabs: Dashboard, Properties, Team (1), Tasks, Financial Plans, Chargebacks, Hierarchy, Risks/Issues/Changes, and a search icon. Below the tabs, the project name 'Project: Project Planning Software Training - Team - Staff' is displayed, along with a 'Scenario: [--Select--]' dropdown and an 'Actions' dropdown (2). A 'Filter: System Default' dropdown is also present. The main area contains a table with columns: Resource/Role, Project Role, Open for Time, Booking Status, Request Status, Start, Finish, Average Allocation %, Allocation, and ETC. The table lists seven roles: Architect, Business Analyst, Developer, Network Engineer, Project Manager, Storage Architect, and Test Engineer, each with associated dates and allocation values. At the bottom, there are buttons: Save, Add (4), Add/Update by OBS, and Remove. A 'Configure' gear icon (3) is located in the top right corner of the table area. The bottom right of the interface shows 'Displaying 1 - 7 of 7'.

Resource/Role	Project Role	Open for Time	Booking Status	Request Status	Start	Finish	Average Allocation %	Allocation	ETC
Architect	Architect	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	160.00
Business Analyst	Business Analyst	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	280.00
Developer	Developer	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	320.00
Network Engineer	Network Engineer	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	240.00
Project Manager	Project Manager	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	280.00
Storage Architect	Storage Architect	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	160.00
Test Engineer	Test Engineer	✓	Soft	New	1/29/18	5/14/18	100.0%	608.00	160.00
Total								4,256.00	1,600.00

Part IV:

Work Breakdown Structure

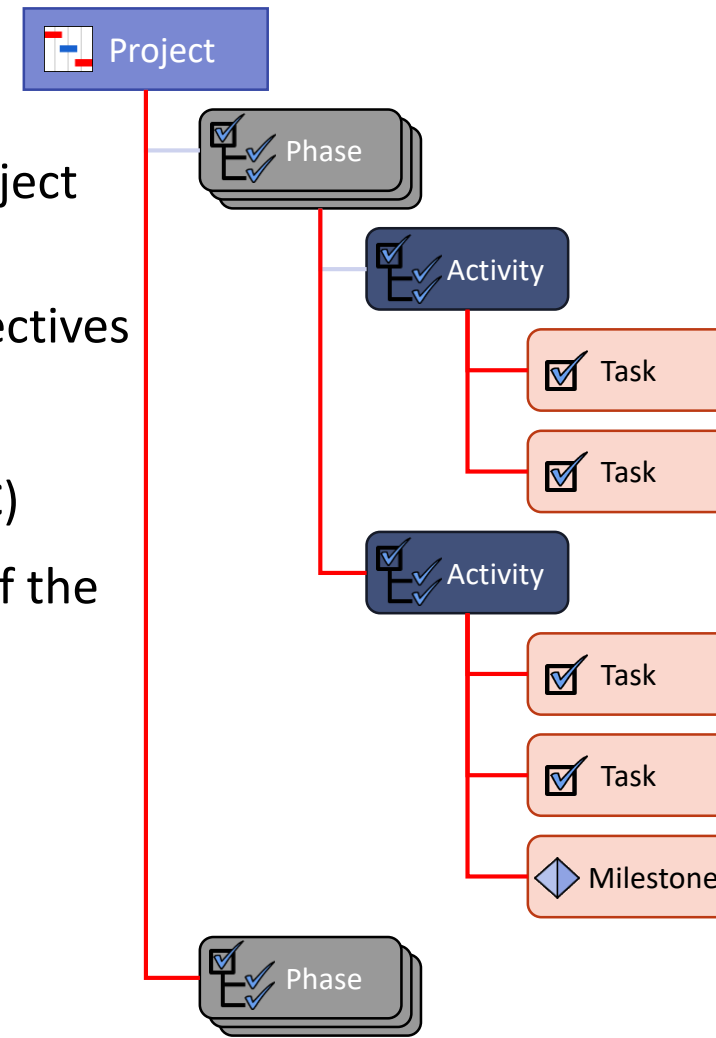
The Tasks Tab
Task Properties



Let Rego be your guide.

Work Breakdown Structure

- WBS typically consists of phases, activities, and tasks
 - Phases are the major steps required to achieve a project goal
 - Activities are established to complete the phase objectives
 - Activities are split into tasks to break up the work
 - Milestones have no duration and no work effort (ETC)
 - Resource Assignments are done at the lowest level of the WBS - Tasks



Tasks Tab

The Task Tab contains information and sub-pages pertaining to the work breakdown structure.

- The Task List may be filtered to display only those tasks that have been marked as “Key Tasks” (1)
 - Click the +/- icon to show/hide the filter (2)
 - Click the down arrow to view additional sub-pages (3)

Project: Project Planning Software Training

Filter: None

Task Name

Task ID

Tasks Only: All

Milestone: All

Key Task: All

Open for Time Entry: All

Status: Completed, Not Started, Started

Start: to

Finish: to

WBS Sort: to

Power Filter: [Build Power Filter]

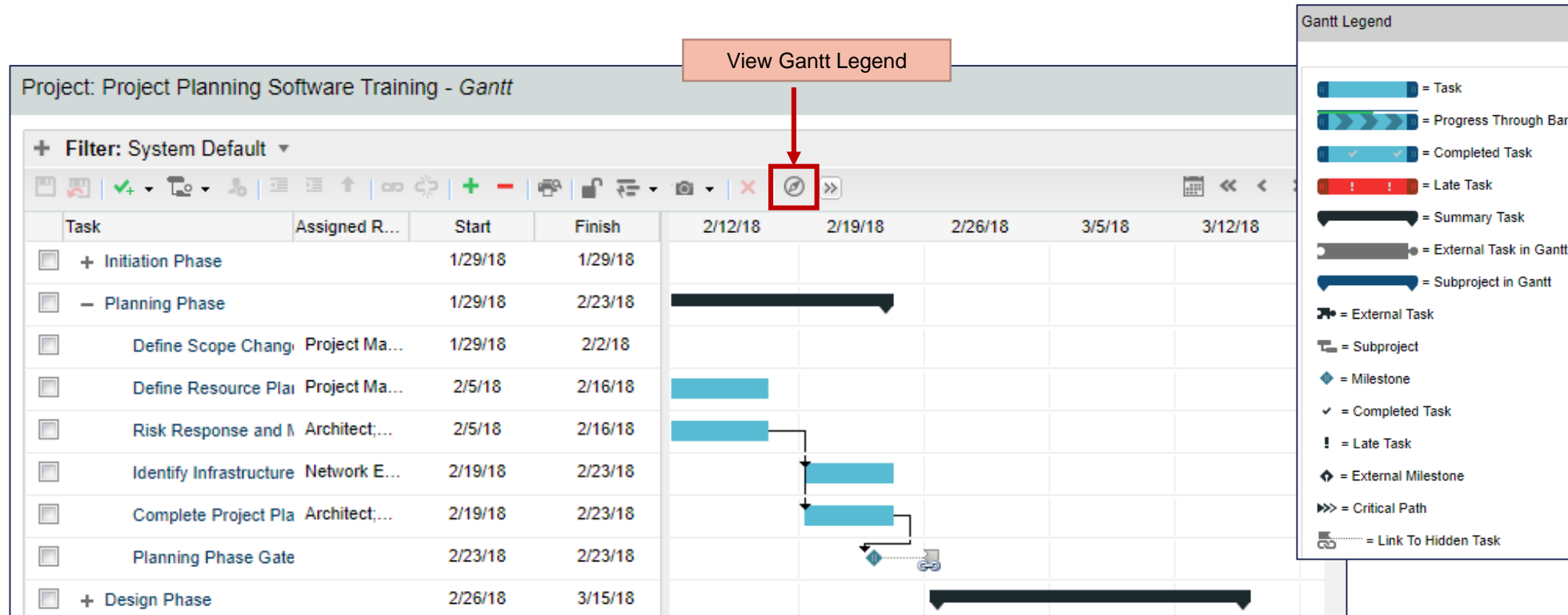
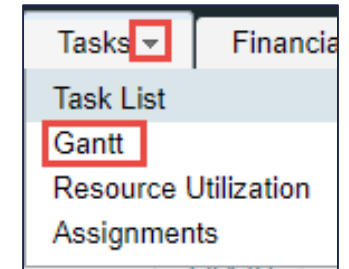
Filter Show All Save Filter Clear

WBS Sort	Task	Task ID	Status	Start	Finish	Duration	Actuals	ETC	Total Effort	Open for Time Entry
1	Initiation Phase	LM.000.000	Not Started	1/29/18	1/29/18	1	0.00	0.00	0.00	✓
2	Initiating Process Complete	LM.000.100	Not Started	1/29/18	1/29/18	0	0.00	0.00	0.00	✓
3	Planning Phase	LM.001.000	Not Started	1/29/18	2/23/18	20	0.00	480.00	480.00	✓
	Define Scope Change and Control Process	LM.001.010	Not Started	1/29/18	2/2/18	5	0.00	40.00	40.00	✓

Link to Task Properties Window

PPM Gantt View

- Create, edit and manage project tasks using the Gantt view
- Click the Tasks down arrow and select Gantt to open the Gantt view in a new browser window



Baselining

Value

- Without baselining, it's difficult to understand project health. Even a simple process to take baselines throughout the project can yield useful project health information such as schedule health and cost health.
- The schedule baseline coupled with a budget plan and updated forecasts, provides a comprehensive view of project health.
- This is a foundational step to moving towards EVM
- Baselines are needed to populate most of the variance metrics

Dashboard Properties Team Tasks Financial Plans Chargebacks Hierarchy Risks/Issues/Changes Processes

Project: BYOD Management - Properties - Baseline

Filter: None

Revision Name	Revision ID	Current Revision	Baseline Start	Baseline Finish	BAC	BAC Cost
Baseline	BL1001	✓	11/1/16	5/4/17	2,196.00	343,020.00

Displaying 1 - 1 of

Save New Delete

= Highlighted rows = Current Revision = Currency = USD

Investment: BYOD Management - Baseline Revision Properties

Revision Name: Baseline Baseline Start: 11/1/2016

Revision ID: BL1001 Baseline Finish: 5/4/2017

Description: Baseline Current Revision: ☒

Baseline Effort and Cost

BAC: 2,196

BAC Cost: 343,020.00

Performance Against Current Baseline

Planned Value (BCWS): 0.00	Cost Variance (CV): 0.00
Earned Value (BCWP): 0.00	Schedule Variance (SV): 0.00
Actual Cost (ACWP): 0.00	Cost Performance Index (CPI):
	Schedule Performance Index (SPI):

Save Save And Return Return

Part V:

Resource Assignments to Tasks

Create an Assignment



Let Rego be your guide.

Assigning Resources and Roles to Tasks

- After creating the WBS and populating the Team, assign resources to tasks
- Based on the Organizations decisions of how the “*Assignment Pool*” field is set up at project creation will impact how resource / roles can be assigned to tasks
 - **Team Only** – when selected means that all resources / roles MUST be staffed (Team Tab) to the project before they can be assigned to any tasks
 - **Resource Pool** – when selected means that resources / roles can be assigned to tasks without be placed on the Team Tab first. Once they are assigned to a task, they will appear on the Team Tab with a default allocation of 100%
- You can use the Gantt view to assign resources to tasks, but you must enter the ETC for each resource using the Task Dialogue Assignment button
- Navigate to the *Task tab* and click *Task name* to access the Task Dialogue box

Properties ▾ | Estimating | Associated Risks/Issues | Processes

Project: Test Project | Task: Kickoff Meeting - Task Properties

General

☒ Name: Kickoff Meeting
☒ ID:
☒ Start: 4/3/2017
☒ Finish: 4/3/2017
 Key Task: ☐
 Milestone: ☐
 Fixed Duration: ☐

☒ = Required
 ☒ = Unique

Assignments

Part VI: Project Sub-Objects



Let Rego be your guide.

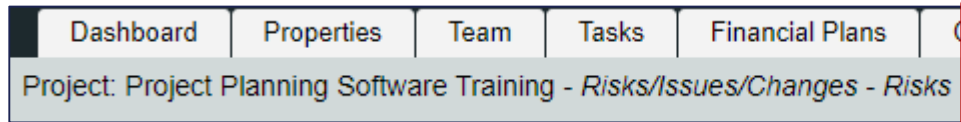
Risks and Issues

- Risks and Issues can be identified at any time during a project's lifecycle
- A Risk can escalate to an Issue, and an Issue can downgrade to a Risk
- Both Risks and Issues can create Change Requests
- You can also enter a Change Request from scratch
- Risks can tie back to the Risk Subpage, allowing Clarity to determine the overall project risk score
- You can link Risks and Issues to Tasks, Response Strategy, Action Items, etc.



Risks and Issues

- Navigate to the Risks/Issues/Changes tab within the project (the Risks sub-page appears by default)



- Risks, Issues and Changes fields and pages are simplified in Base Configuration

A screenshot of the 'Create Risk' form in the project planning software. The form is titled 'Project: Project Planning Software Training - Create Risk'. It contains several fields and sections: 'Scope Creep' (text input), 'RI0028' (ID), 'Objectives' (dropdown), 'Status' (Open), 'Owner' (McGuire, Noreen), 'Target Resolution Date' (2/1/2018), 'Priority' (Low), 'Description' (Omissions in scope), 'Impact Description' (text area), 'Document' (Choose File), 'Quantify Risk' section with 'Probability' (Low) and 'Impact' (High) dropdowns, 'Response Type' (Watch), 'Impact Date' (2/1/2018), and 'Calculated Risk' section. At the bottom are 'Save', 'Save And Return', and 'Return' buttons. A legend at the bottom indicates: * = Required, + = Enter Once, * = Unique.

Change Requests

Change Requests are a critical component of project management.

Project: AA Test User IS Project - *Risks/Issues/Changes - Change Requests*

Filter: System Default ▼											
<input type="checkbox"/>	Change Request	ID	Status	Owner	Priority	Review Date	Expected Close Date ▲	Closure Date	Change in Cost	Change in Schedule	Change in Resources
<input type="checkbox"/>	New Change Request	CR000002	Open	Ensinger, Rob	◆	2/15/18	3/1/18		20,000.00	14	2

Key Attributes in the OOTB Change Request Configuration

- Change in Cost
- Change in Schedule
- Change in Resources

Status Reporting

- The OOTB status report contains analysis of the triple constraint and is an efficient method to communicate status to stakeholders

The screenshot displays two parts of a software interface for project management.

Left Panel: Project: Jovin's Capacity Project - Create Status Report_odmd

Status Report

☒ Status Report Update

Report Date: 5/27/2014

Schedule

Schedule Status: [--Select--]

Next Milestone on Track? ☐

Schedule Update

Scope

Scope Status: [--Select--]

Right Panel: Project: Jovin's Capacity Project - Properties - Main - Status Reports

Filter: System Default

	Overall Status	Status Report Update	Report Date	Schedule	Scope	Cost and Effort
<input type="checkbox"/>	◆	Test	5/27/14	◆	◆	◆

Displaying 1 - 1 of 1

Buttons: Save, New, Delete, Return

Part VII: Financial Plans



Let Rego be your guide.

Overview of Financial Plans

- Detailed financial planning allows for the estimation of costs and/or funding of investments (projects) using cost plans. These plans can then be submitted and approval for funding using budget plans
 - Cost Plans:
 - Are the first step in utilizing Clarity financial plans
 - Time scaled view of the forecasted cost of the investment, but it will also show the actual costs as they are incurred. Forecast can be grouped by financial fields like resource class, cost type, transaction class, etc.
 - Budget Plans:
 - A cost plan becomes a budget plan when approved - the “baseline” for financials
 - Approved budget plans are READ-ONLY ‘snapshots’ of the submitted cost plan
 - Benefit Plans:
 - Time scaled view of the forecasted and realized benefits of the investment. Benefits are listed individually, but categorized into type

Financial Plans

- Time Scaled Values
- Grouping Attributes

<input type="checkbox"/>	Cost Type ▲	Transaction Class	Planned	Actual	Variance		⏪	
							Jan 1, 2014-Jan 31, 2014	Feb 1, 2014-Feb 28, 2014
<input type="checkbox"/>	Capital	Hardware	40,000.00		40,000.00	Planned	0	40,000
						Actual		
						Variance	0	40,000
<input type="checkbox"/>	Capital	Labor	473,600.00	4,000.00	469,600.00	Planned	2,400	92,700
						Actual	0	4,000
						Variance	2,400	88,700
<input type="checkbox"/>	Capital	Software	60,000.00		60,000.00	Planned	0	60,000
						Actual		
						Variance	0	60,000
<input type="checkbox"/>	Operating	Hardware	38,000.00	28,000.00	10,000.00	Planned	0	38,000
						Actual	0	28,000
						Variance	0	10,000
<input type="checkbox"/>	Operating	Labor	2,485,600.00		2,485,600.00	Planned	9,600	204,309
						Actual		
						Variance	9,600	204,309
<input type="checkbox"/>	Operating	Software	12,000.00		12,000.00	Planned	0	12,000
						Actual		
						Variance	0	12,000
Planned			3,109,200.00				12,000	447,009
Actual				32,000.00			0	32,000
Variance					3,077,200.00		12,000	415,009

Questions?



*rego*University 2019
SAN DIEGO

Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com