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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

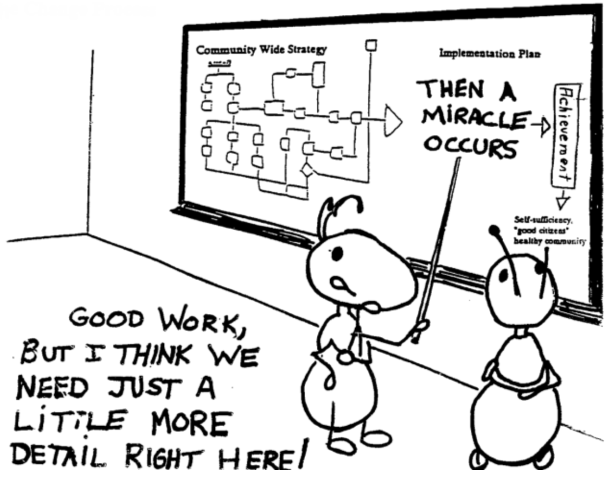
Agenda

- 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

Clarity Project Management

- Projects are 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

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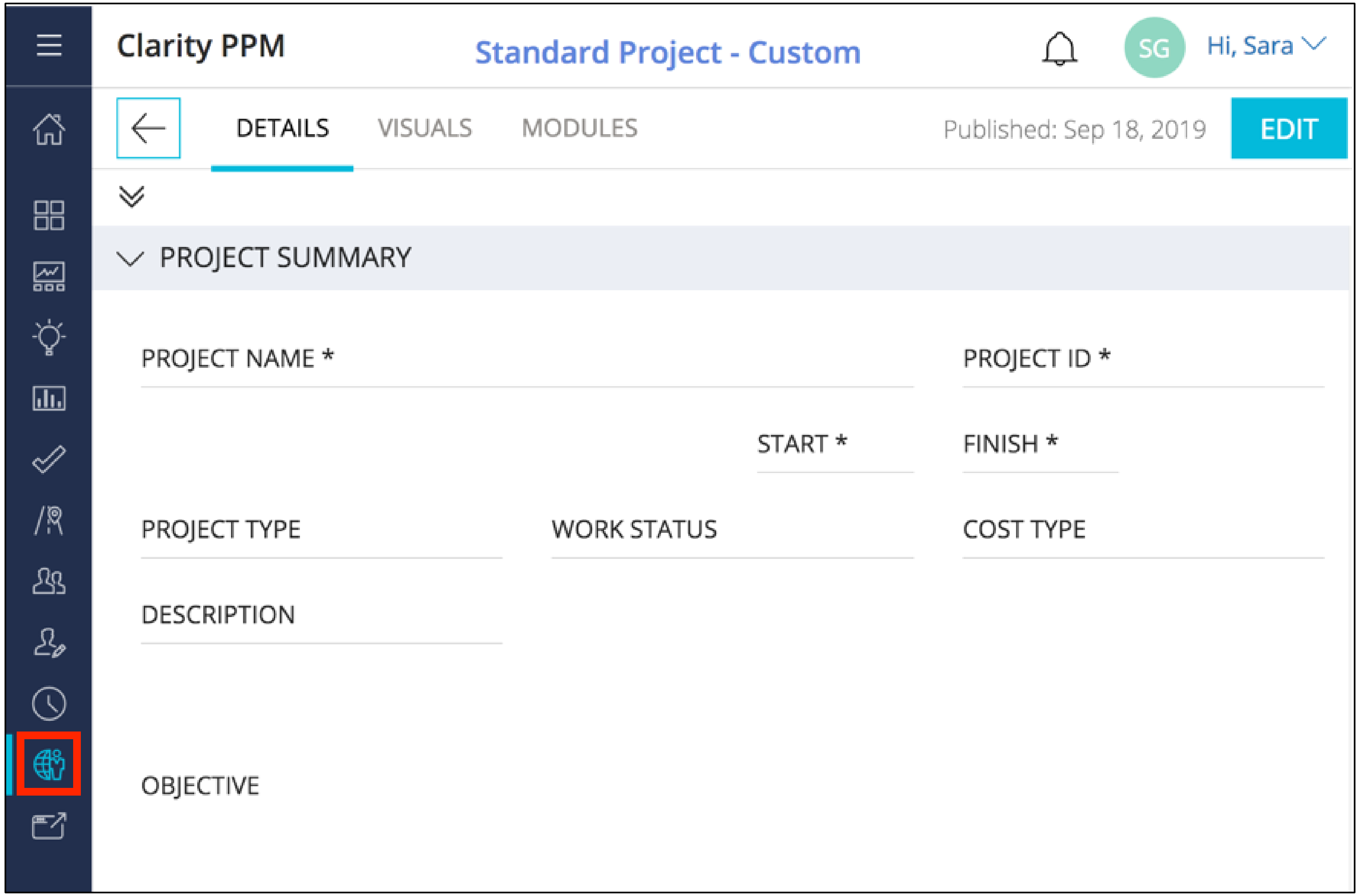
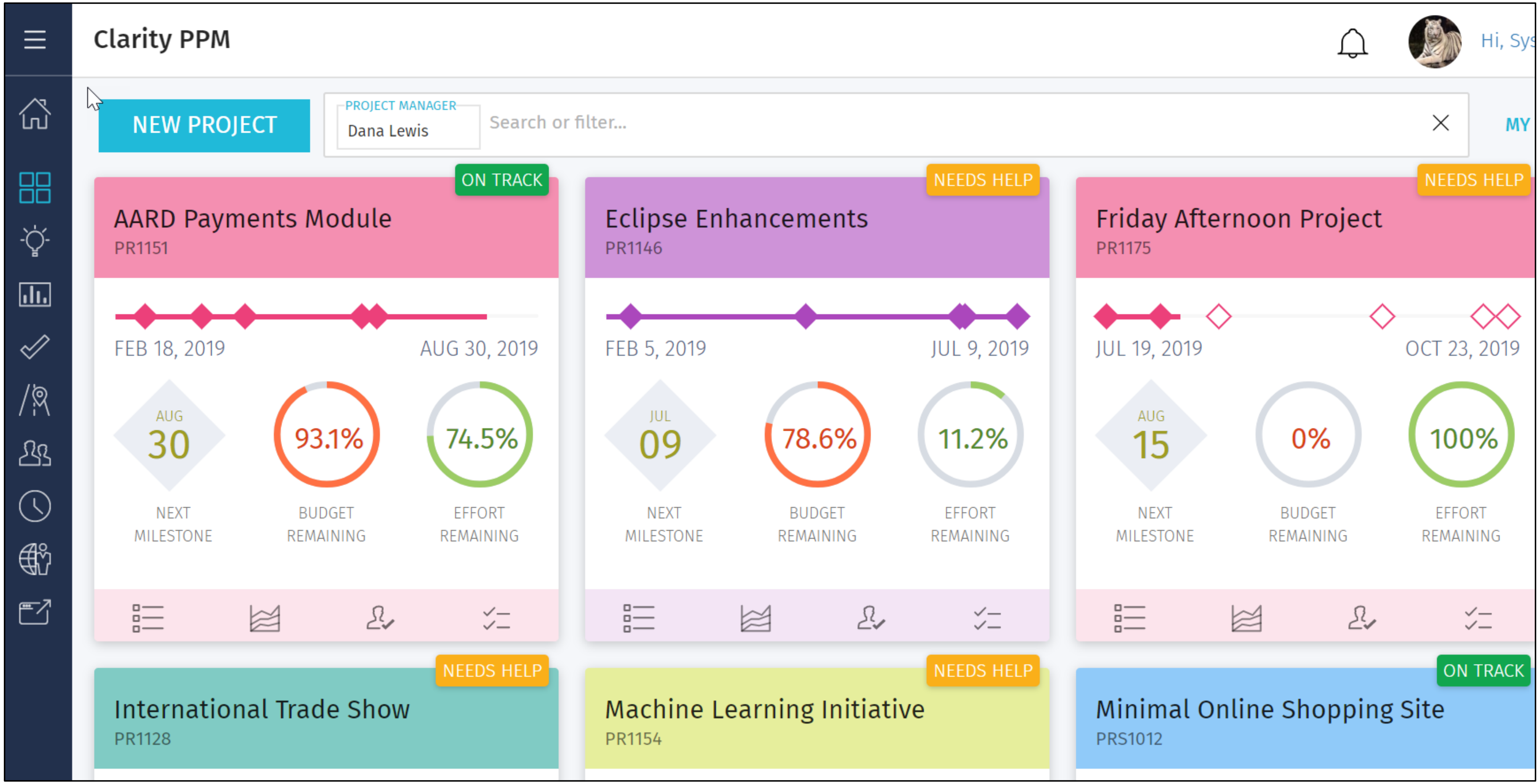
Blueprints in the New UX

- 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.



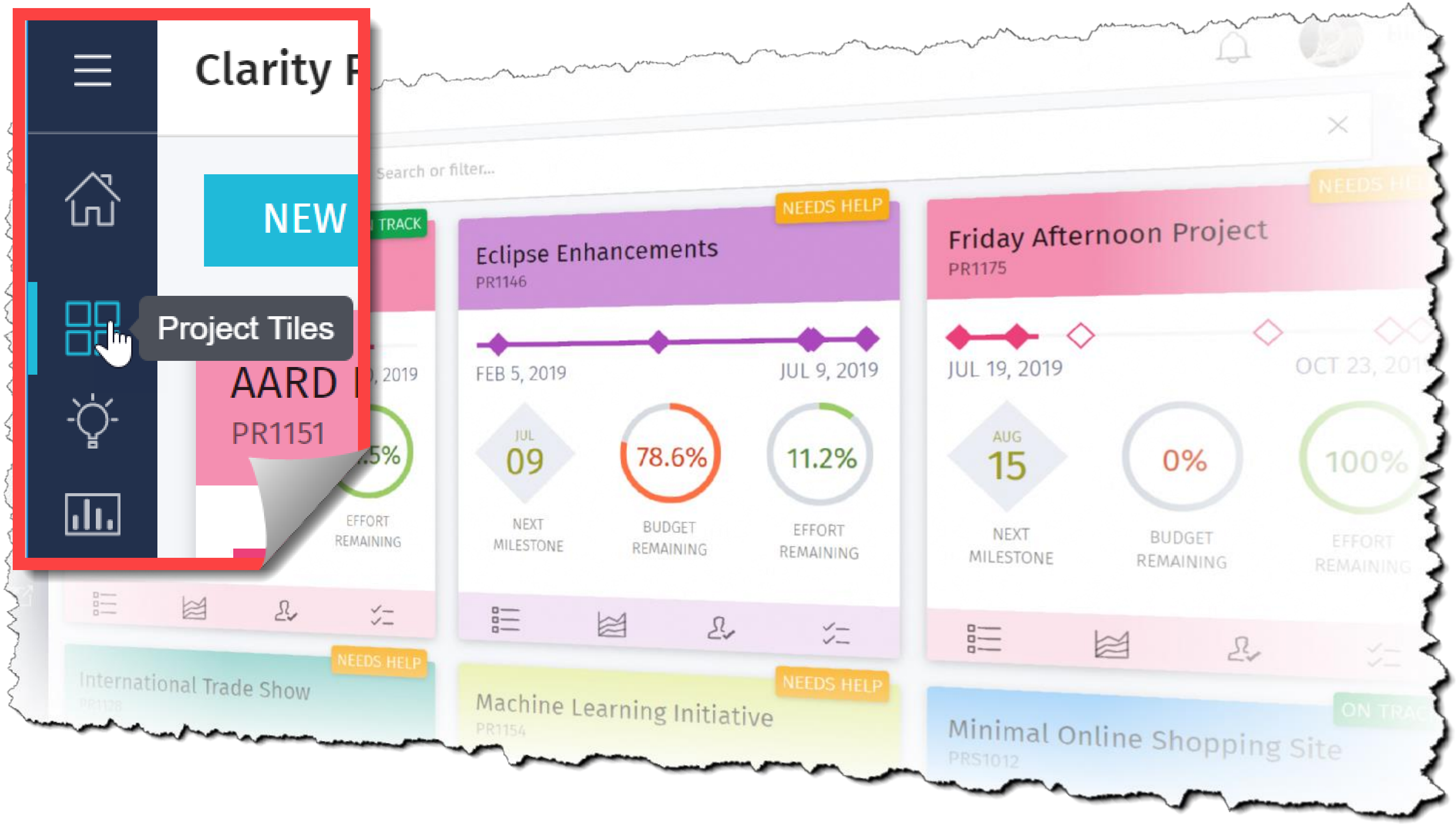
Project Tiles View



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.

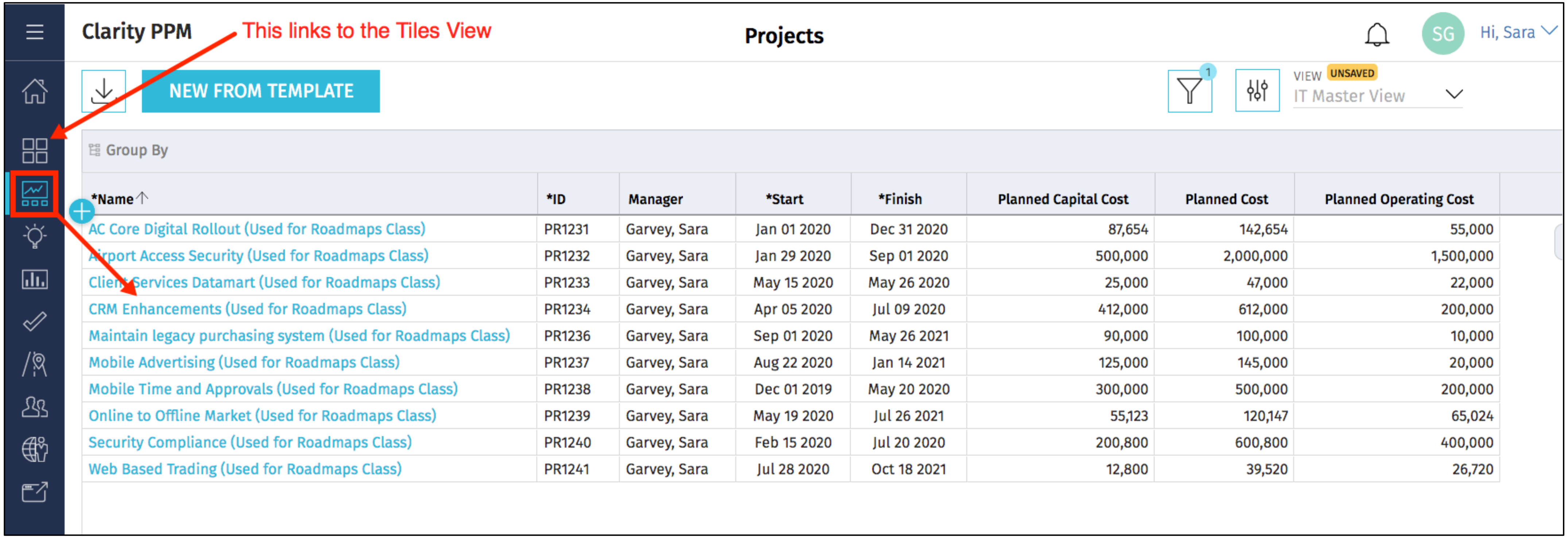
You can click on the data in the tile to go to the project or leverage the "module shortcuts" at the bottom of the tile for a shortcut to that project page,



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.

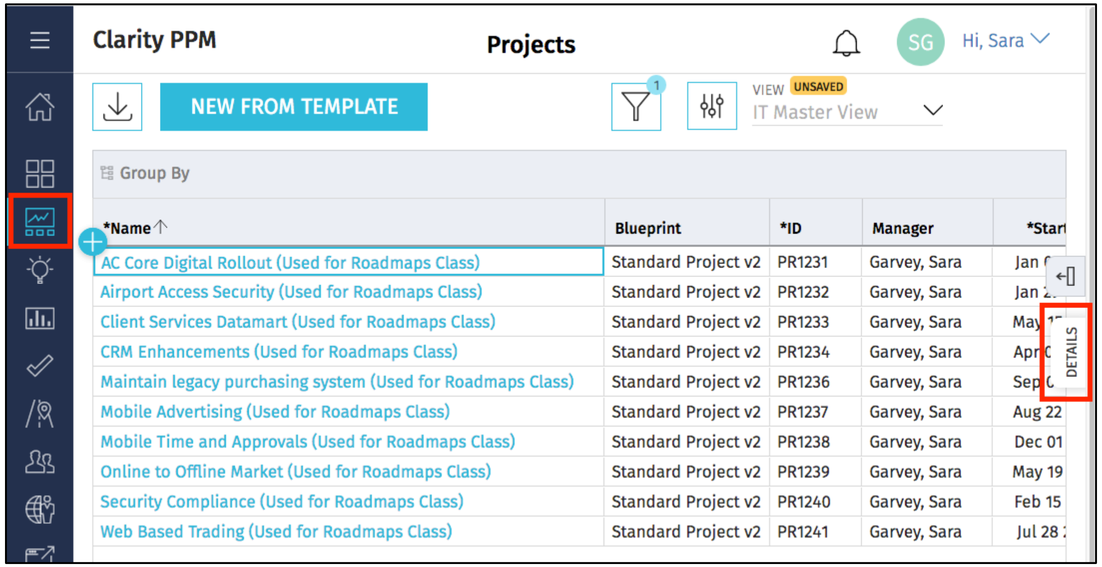
Project Grid View (2)

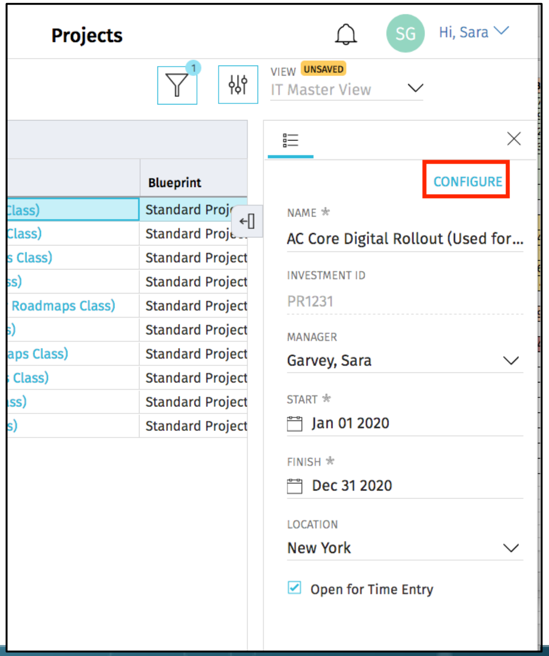


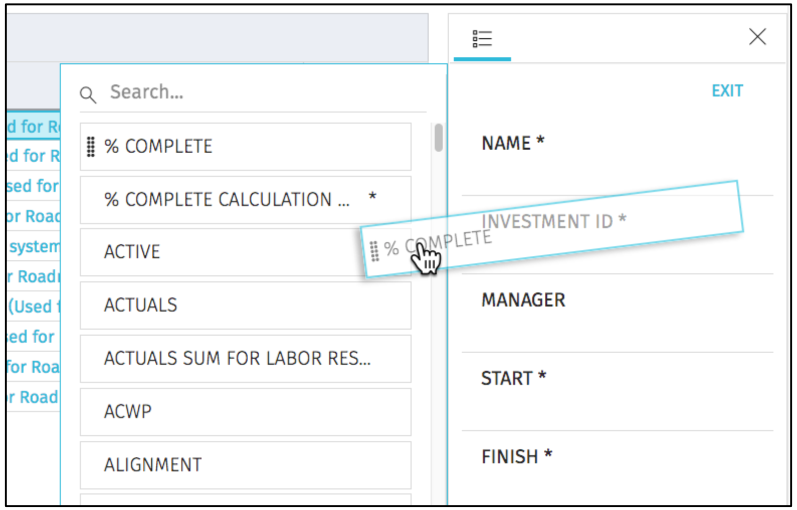
*Name	*ID	Manager	*Start	*Finish	Planned Capital Cost	Planned Cost	Planned Operating Cost
AC Core Digital Rollout (Used for Roadmaps Class)	PR1231	Garvey, Sara	Jan 01 2020	Dec 31 2020	87,654	142,654	55,000
Airport Access Security (Used for Roadmaps Class)	PR1232	Garvey, Sara	Jan 29 2020	Sep 01 2020	500,000	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

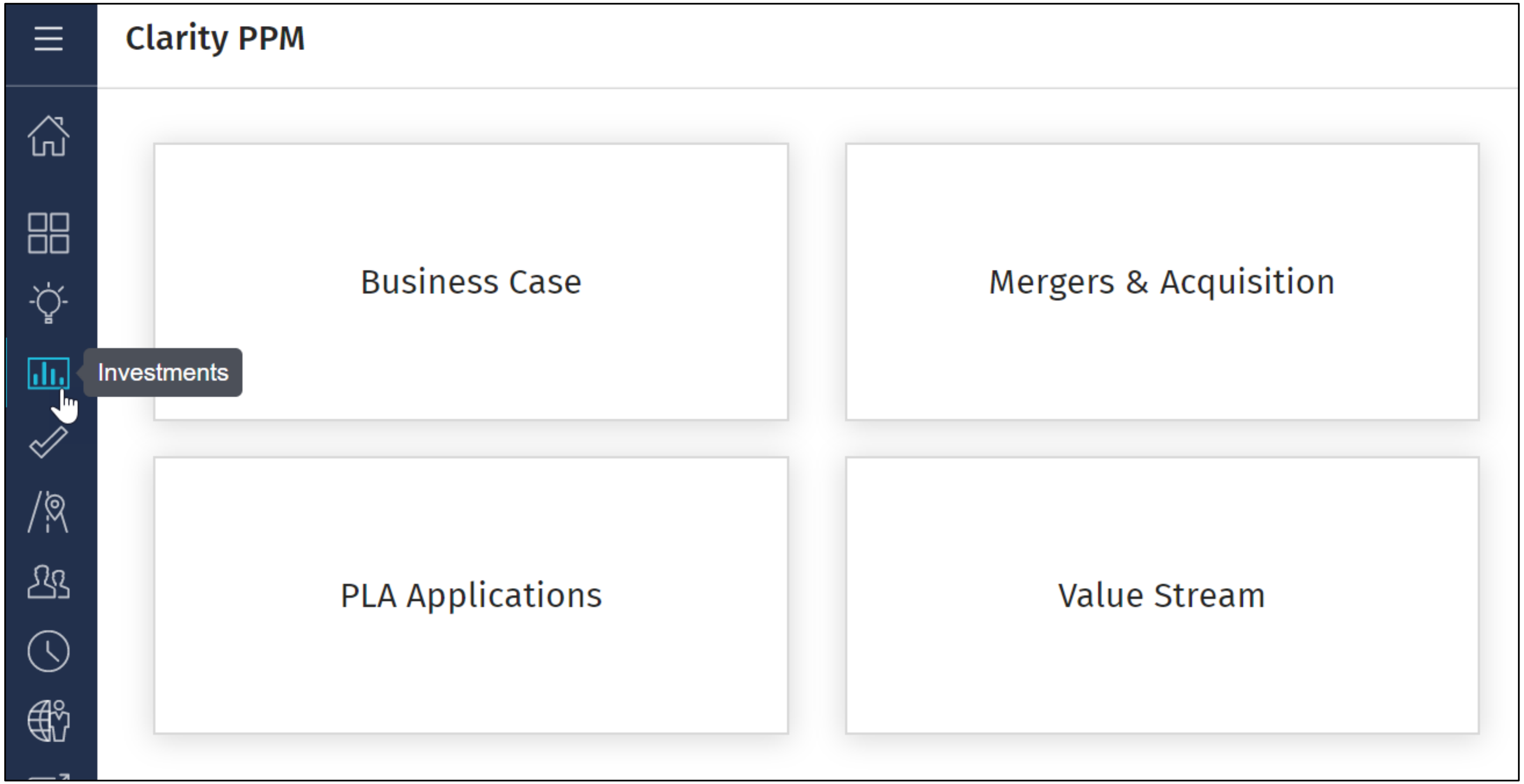
- On Projects, Ideas or Custom Investments for which a user has edit rights, the user may update grid data via a configurable Details pane/panel. Users themselves may determine which fields appear on the panel, and panel configurations can be saved to a view.
- Note that you must first click on an item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





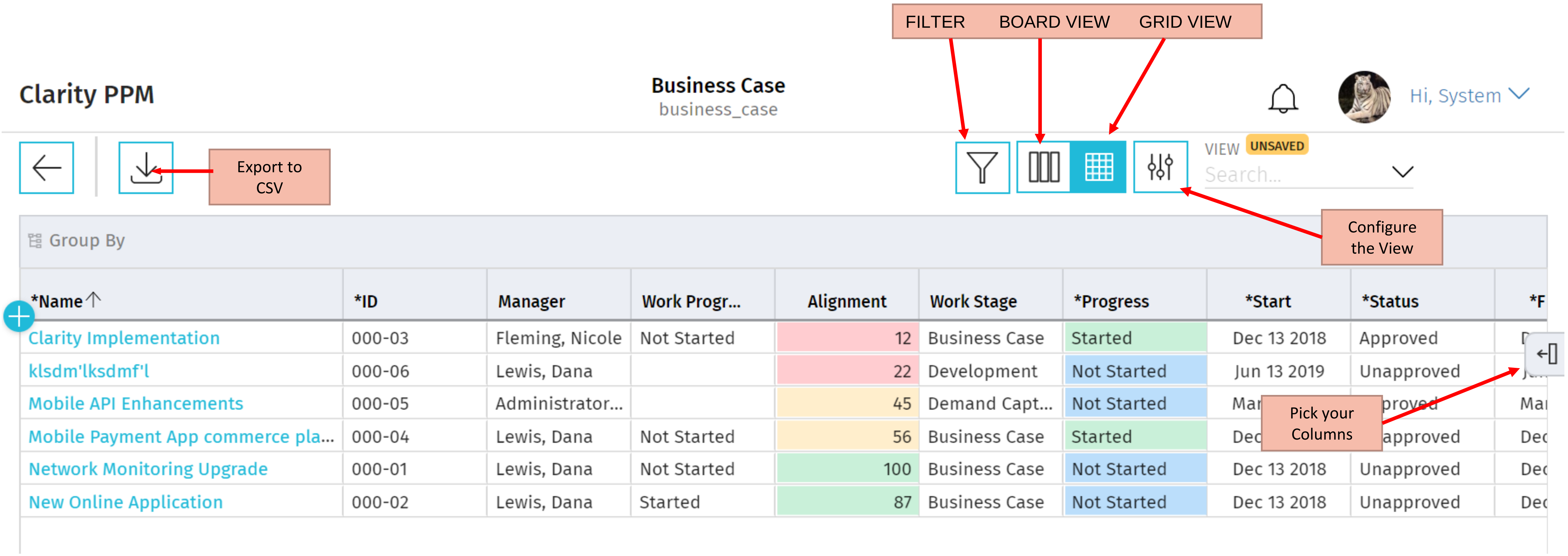


Custom Investments



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

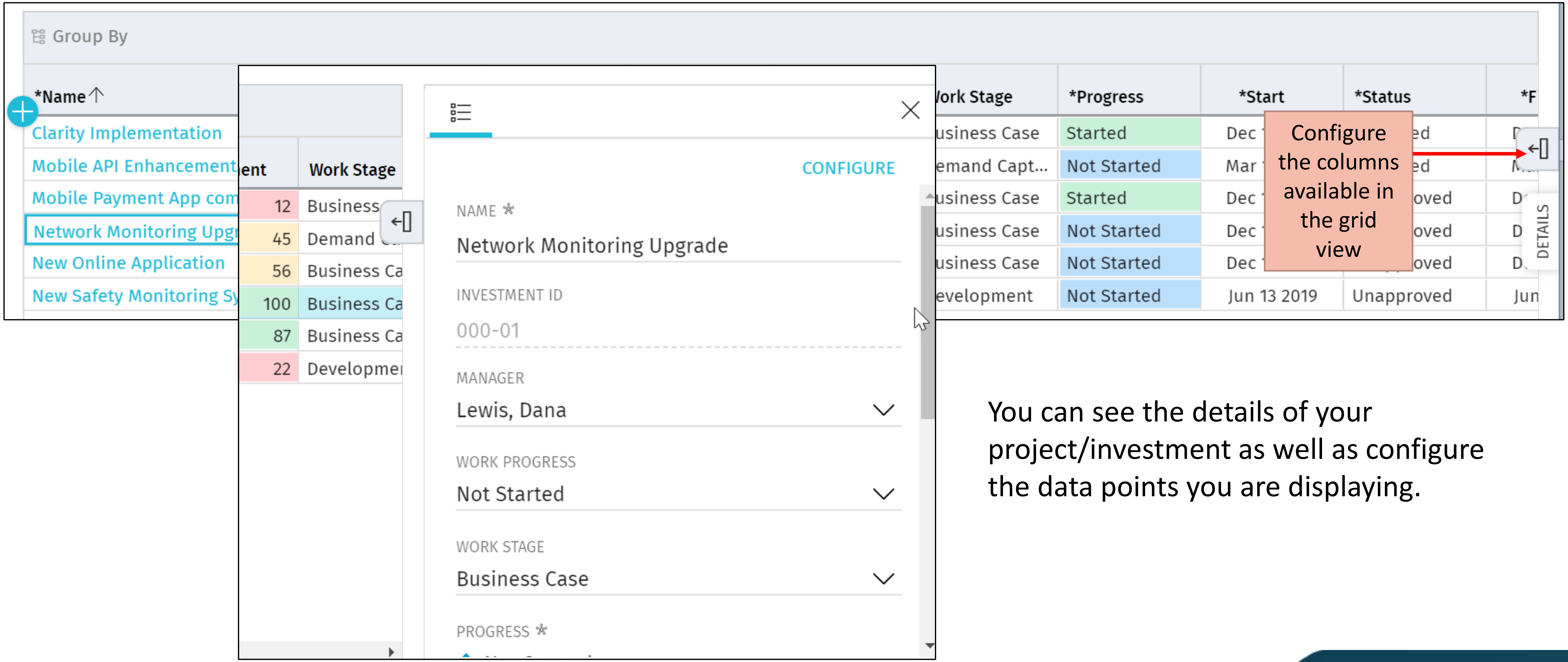


*Name	*ID	Manager	Work Progr...	Alignment	Work Stage	*Progress	*Start	*Status	*F
Clarity Implementation	000-03	Fleming, Nicole	Not Started	12	Business Case	Started	Dec 13 2018	Approved	D
klsdm'lksdmf'l	000-06	Lewis, Dana		22	Development	Not Started	Jun 13 2019	Unapproved	
Mobile API Enhancements	000-05	Administrator...		45	Demand Capt...	Not Started	Mar	proved	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.

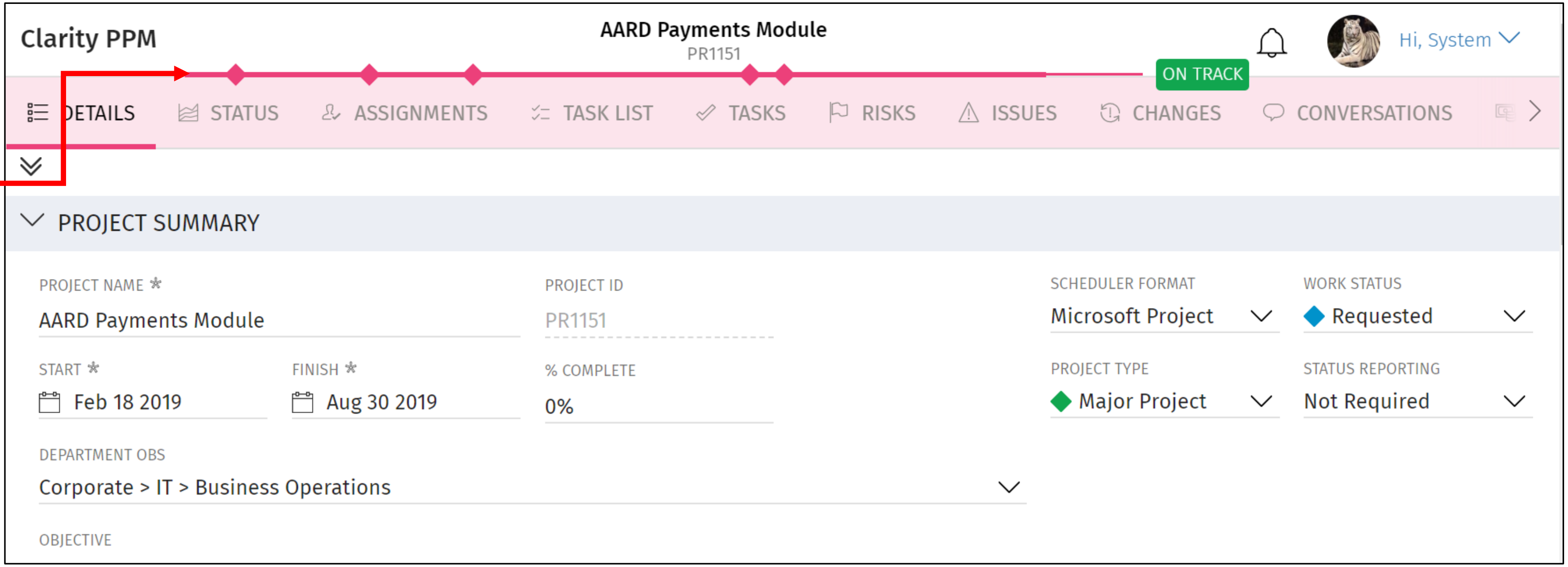


You can see the details of your project/investment as well as configure the data points you are displaying.

Details Tab

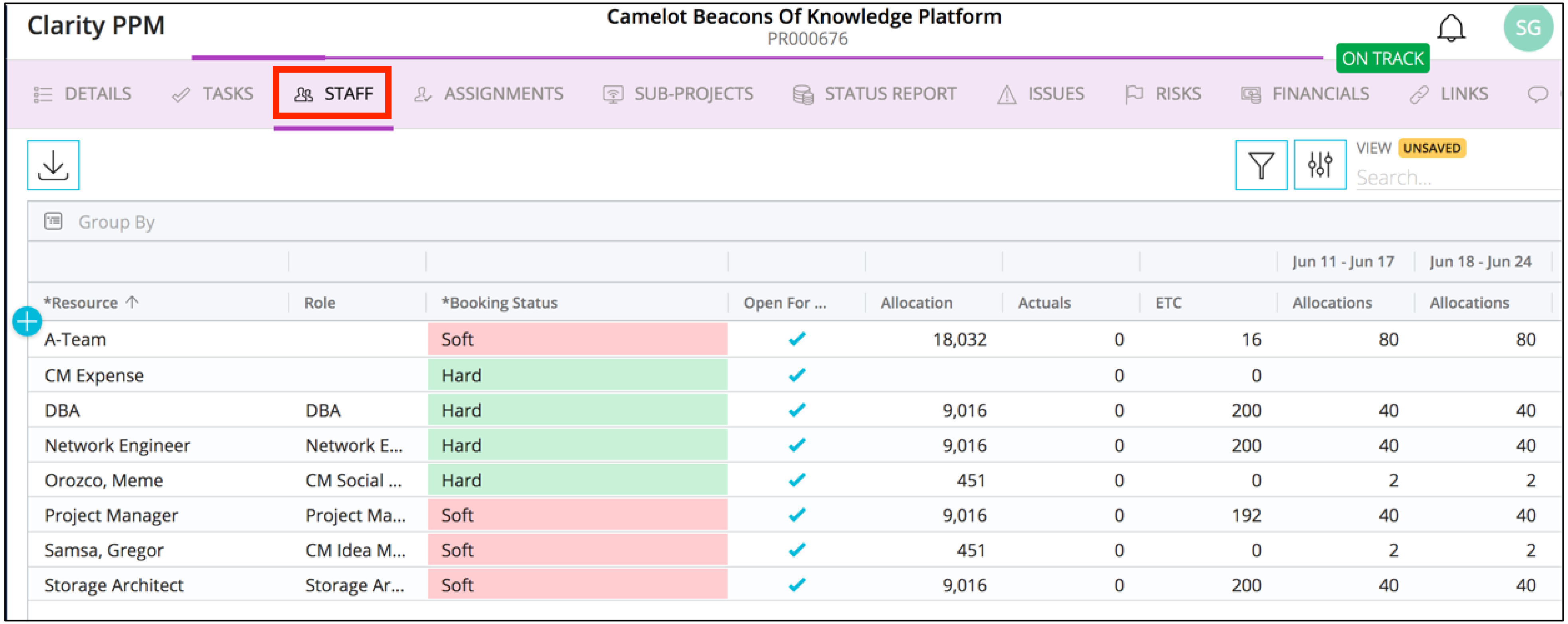
- The Details tab displays the project attributes.
- Details tabs can display different data in different Blueprints.

Milestone Status Bar



Staff Tab

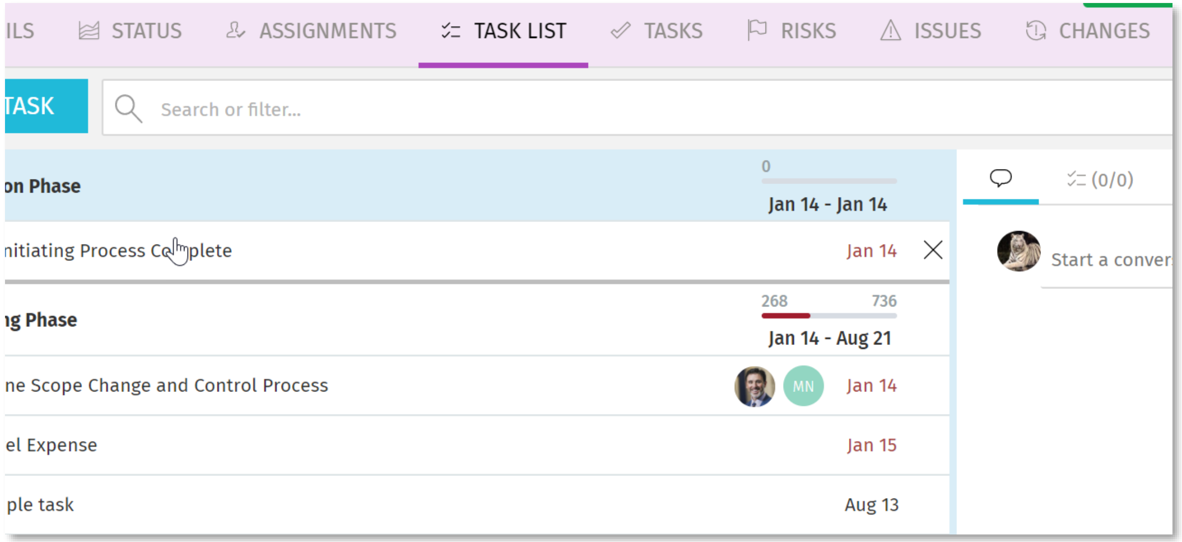
- Staff Roles and Resources to the Project
- Update Default and Time-Scaled Allocations

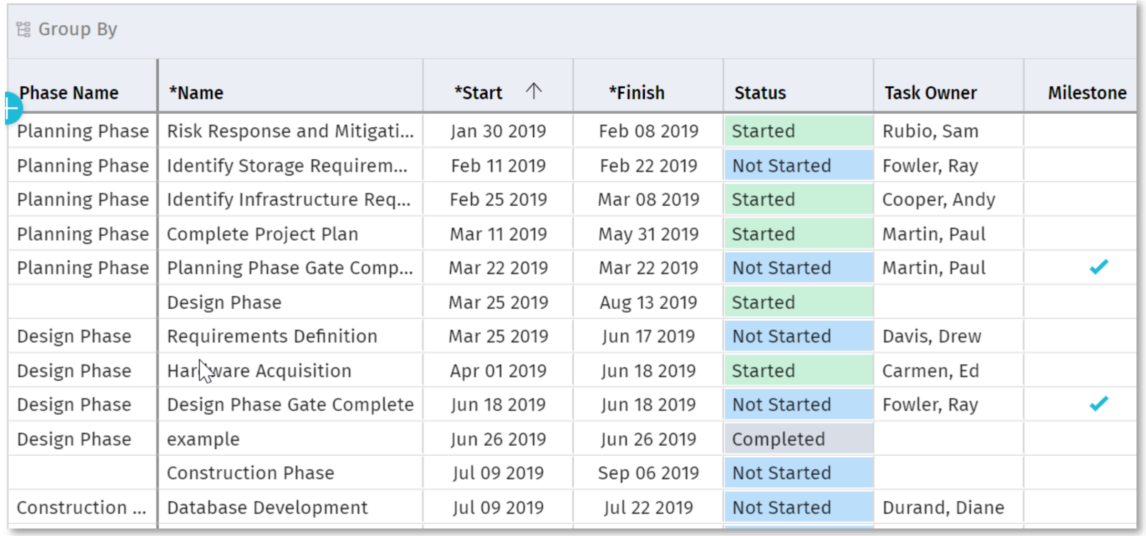


							Jun 11 - Jun 17	Jun 18 - Jun 24
*Resource ↑	Role	*Booking Status	Open For ...	Allocation	Actuals	ETC	Allocations	Allocations
A-Team		Soft	✓	18,032	0	16	80	80
CM Expense		Hard	✓		0	0		
DBA	DBA	Hard	✓	9,016	0	200	40	40
Network Engineer	Network E...	Hard	✓	9,016	0	200	40	40
Orozco, Meme	CM Social ...	Hard	✓	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

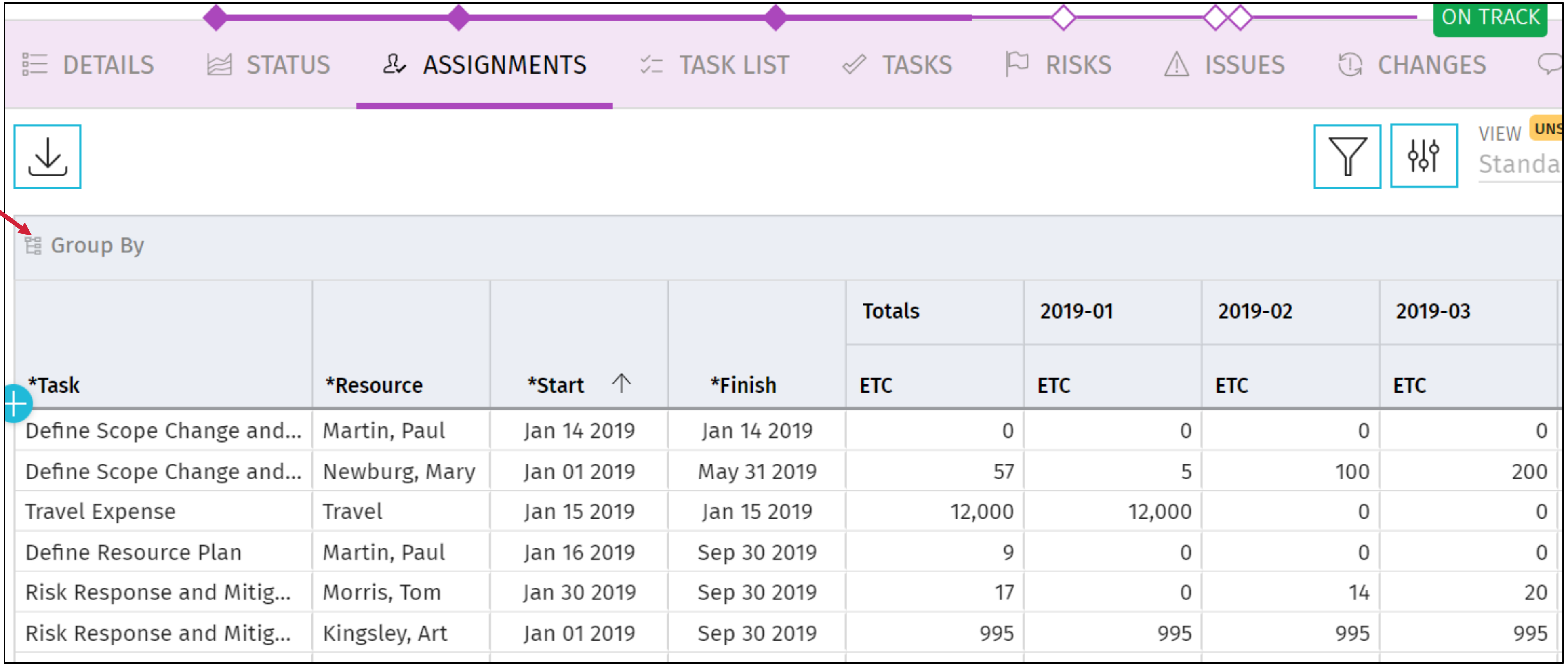



Group By

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

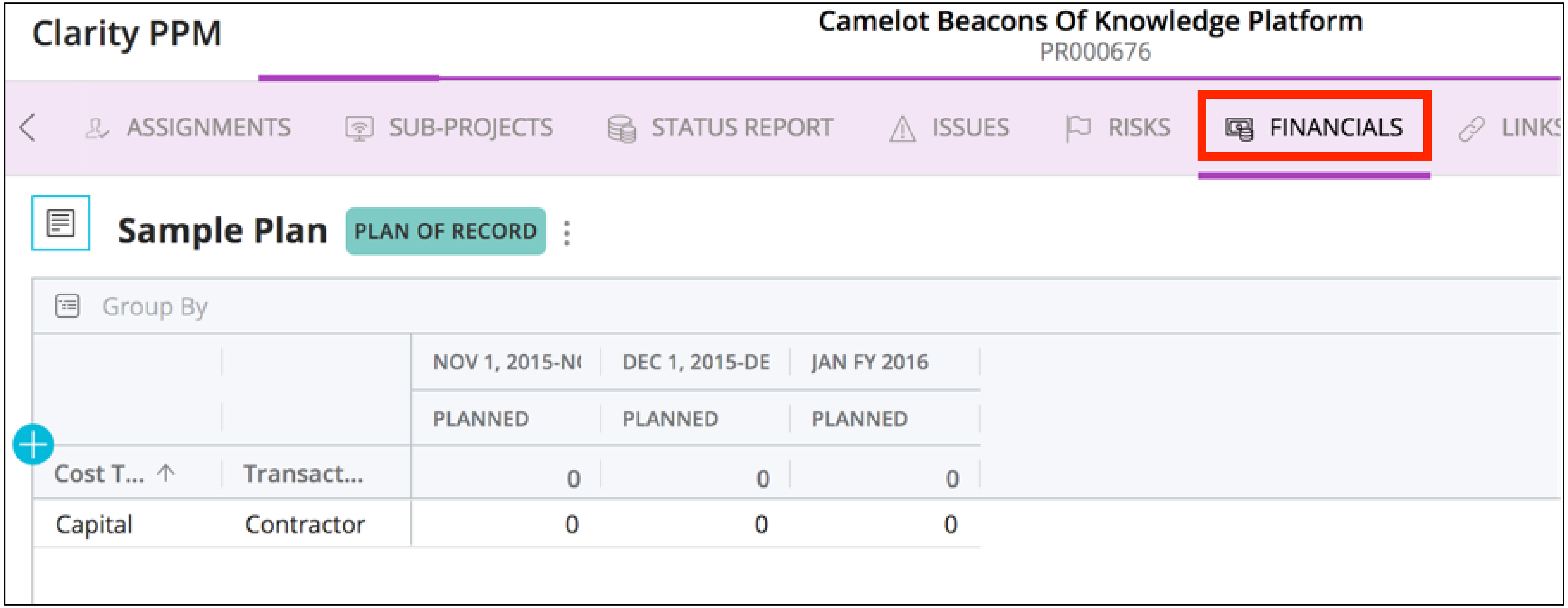


*Task	*Resource	*Start	*Finish	Totals	2019-01	2019-02	2019-03
				ETC	ETC	ETC	ETC
Define Scope Change and...	Martin, Paul	Jan 14 2019	Jan 14 2019	0	0	0	0
Define Scope Change and...	Newburg, Mary	Jan 01 2019	May 31 2019	57	5	100	200
Travel Expense	Travel	Jan 15 2019	Jan 15 2019	12,000	12,000	0	0
Define 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

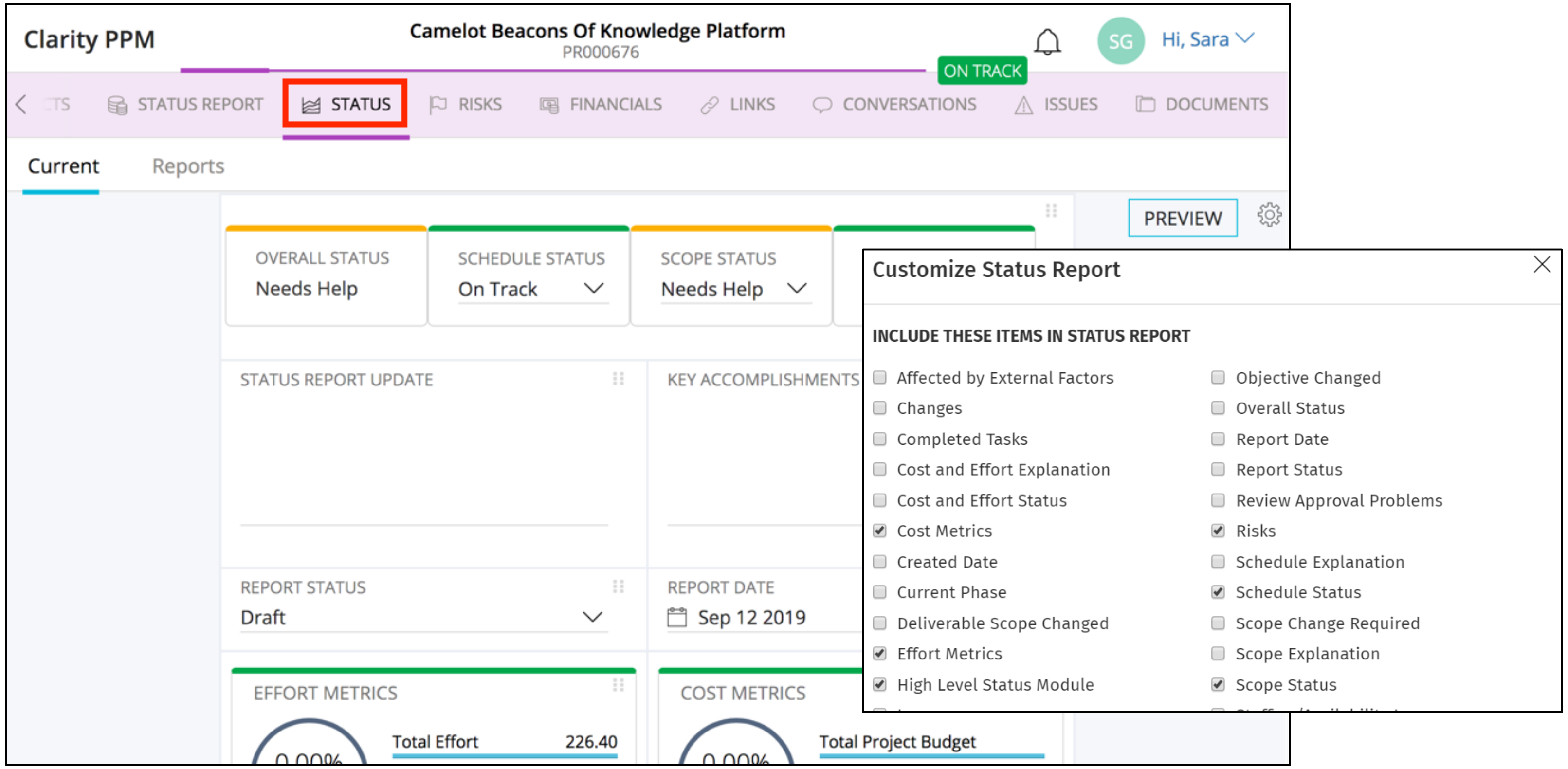
The Financials Tab

- Create and edit Cost and Budget Plans

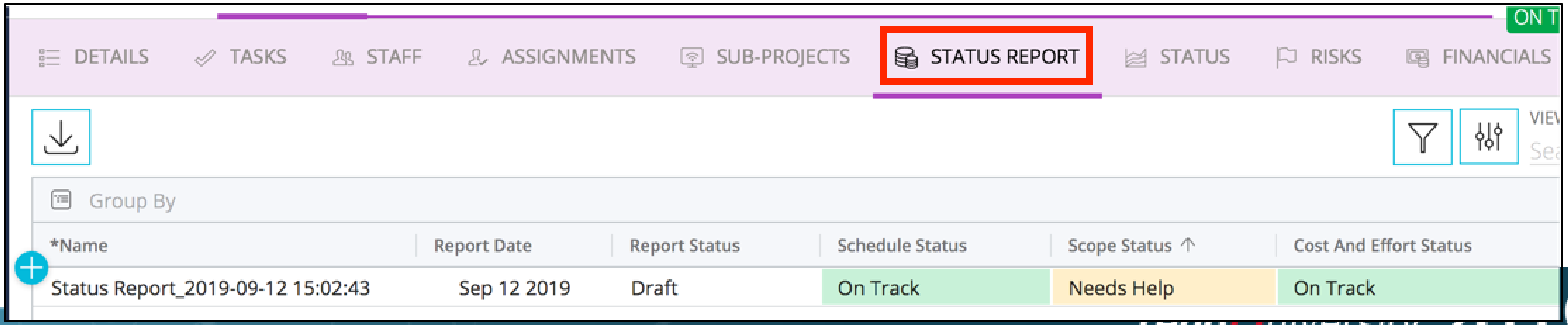


The Status Tab and Status Report Tabs

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

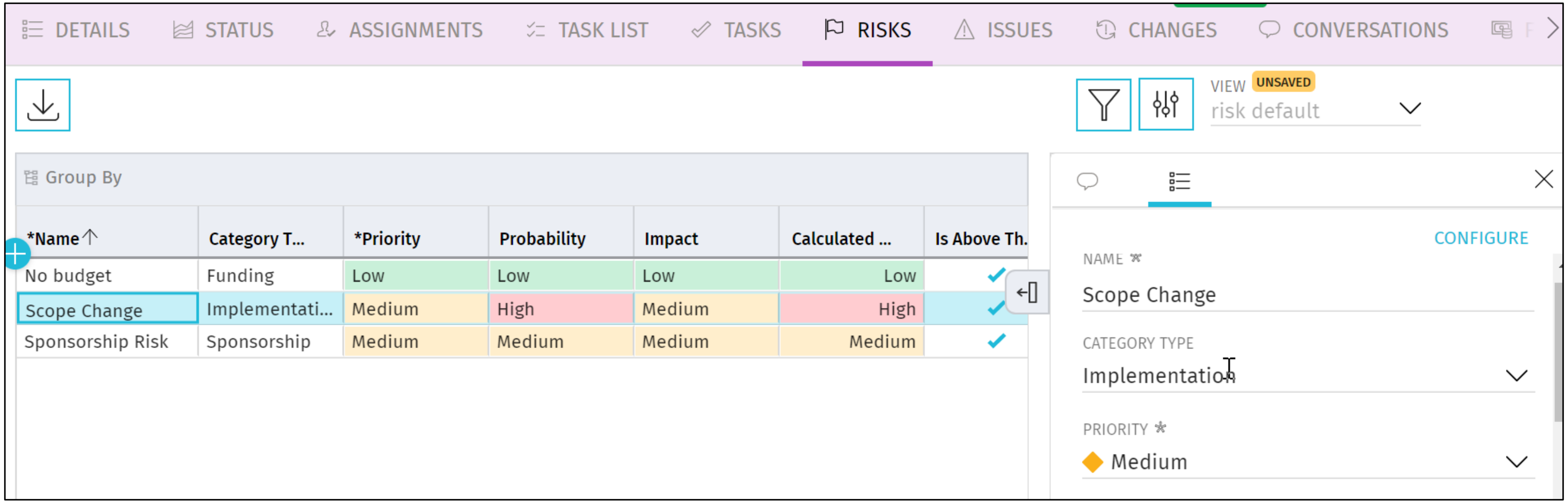


- Status Report Tab
  - Classic Style Status Report
  - Grid View Only



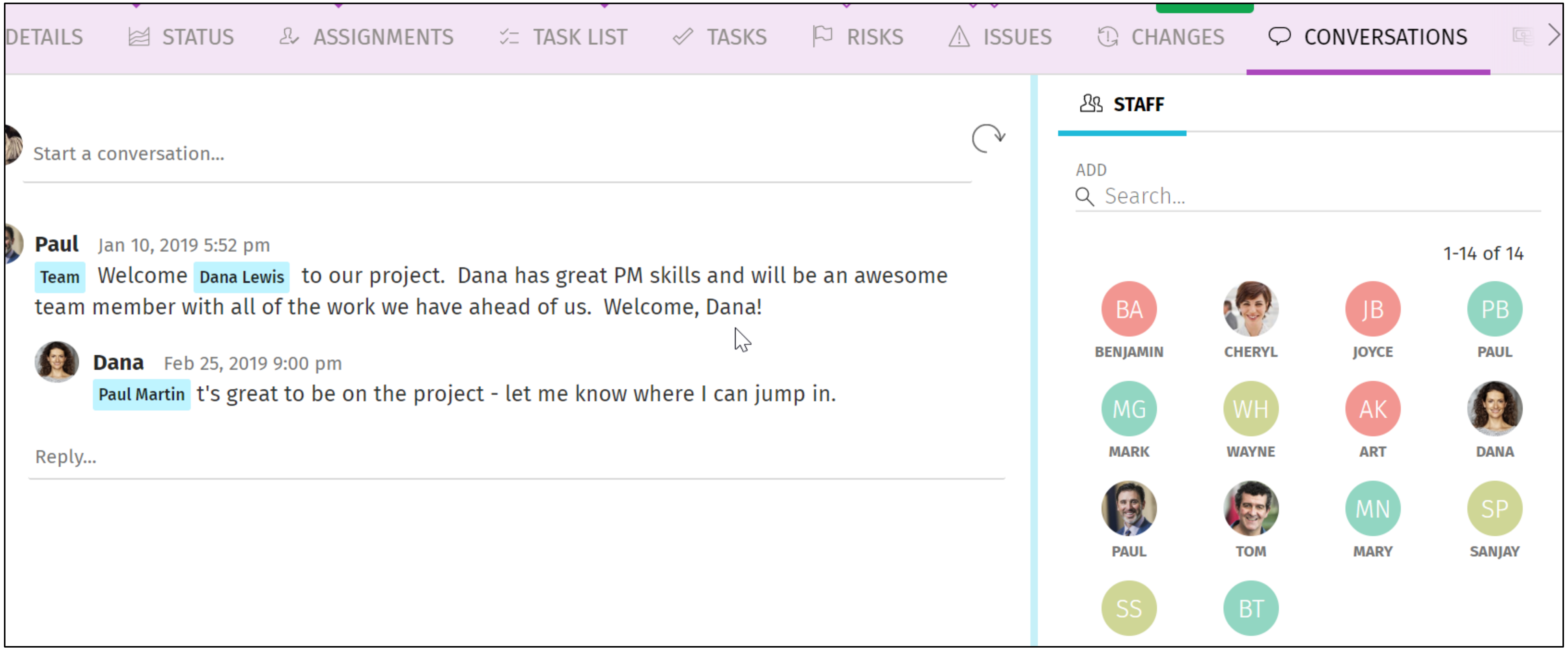
Risks, Issues, Changes Tabs

- 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



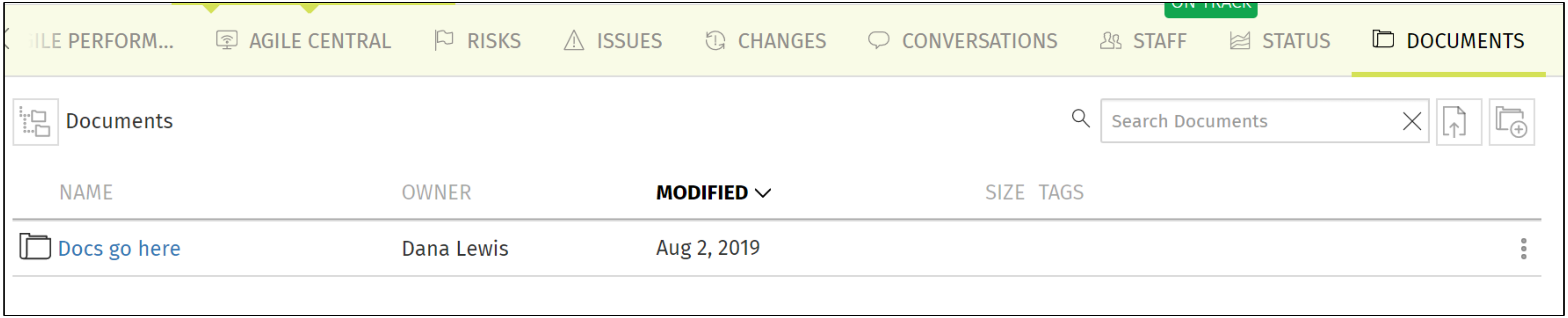
Conversations Tab

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



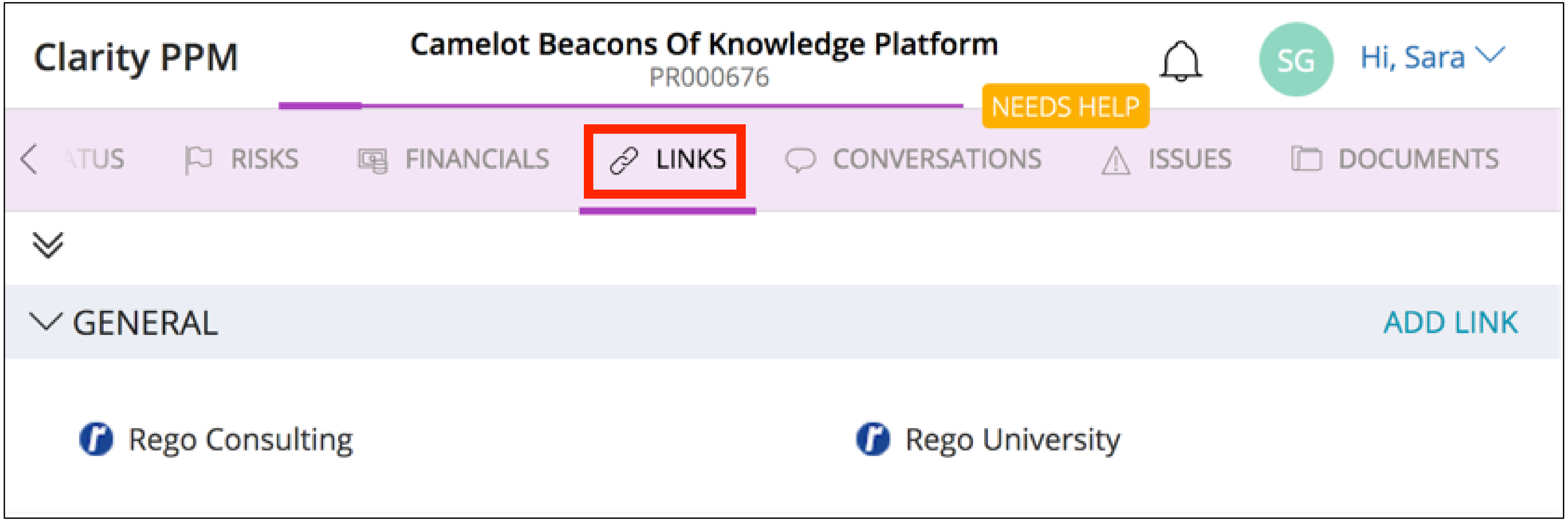
Documents Tab

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



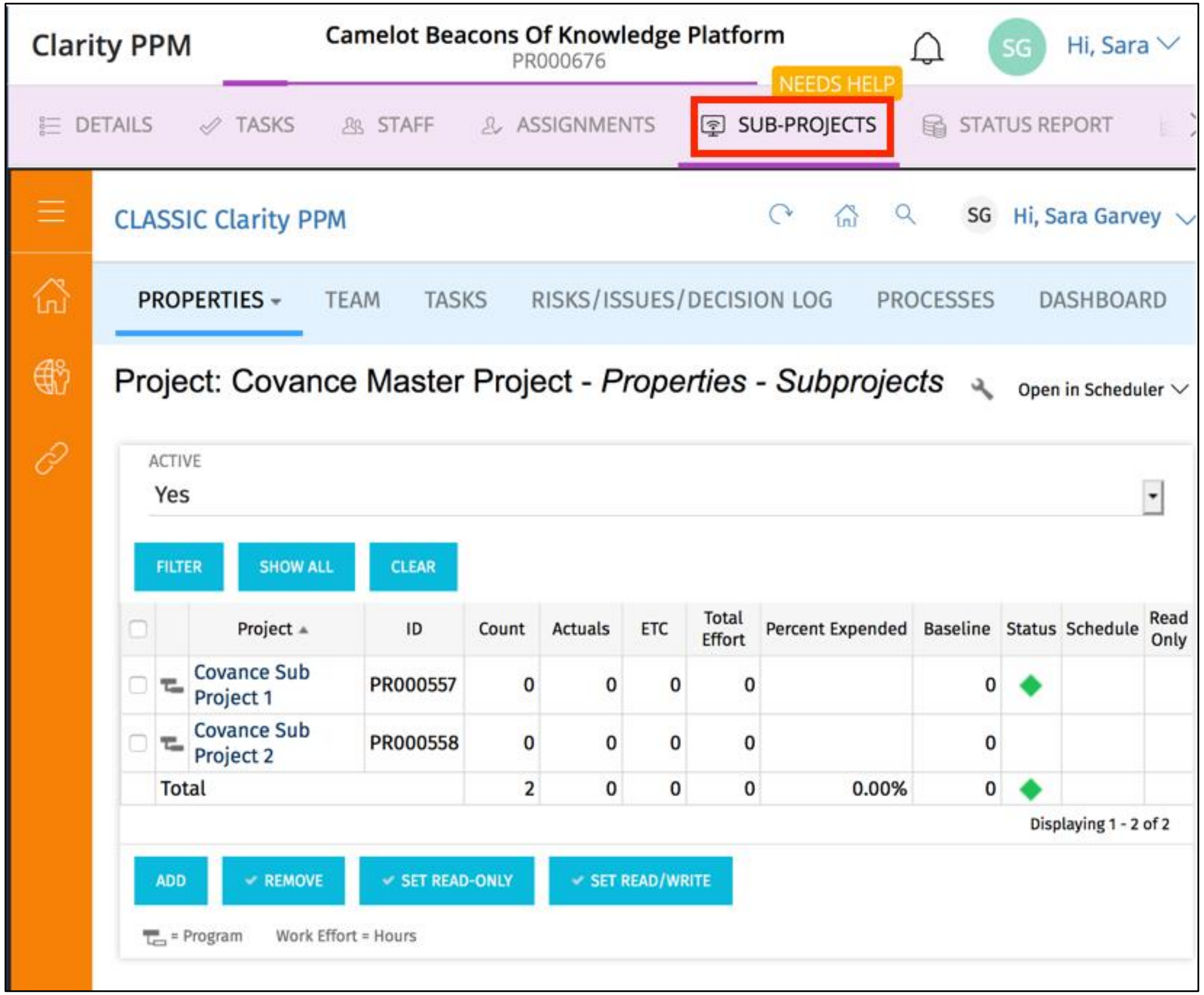
Links Tab

- 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.

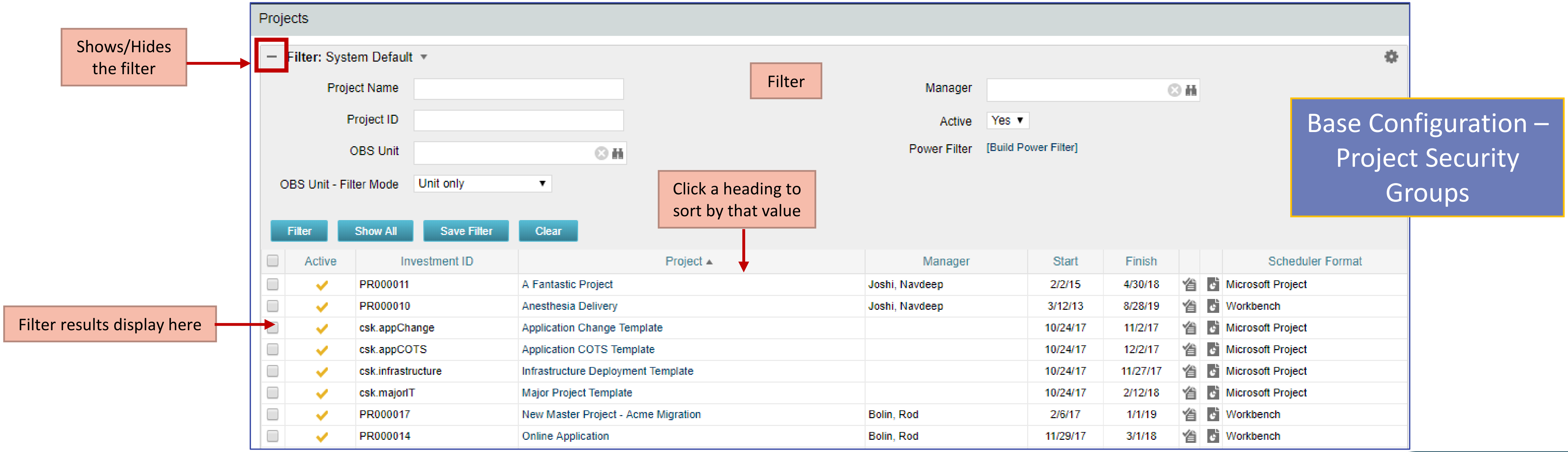


Part III:
The Classic Experience

Project List View

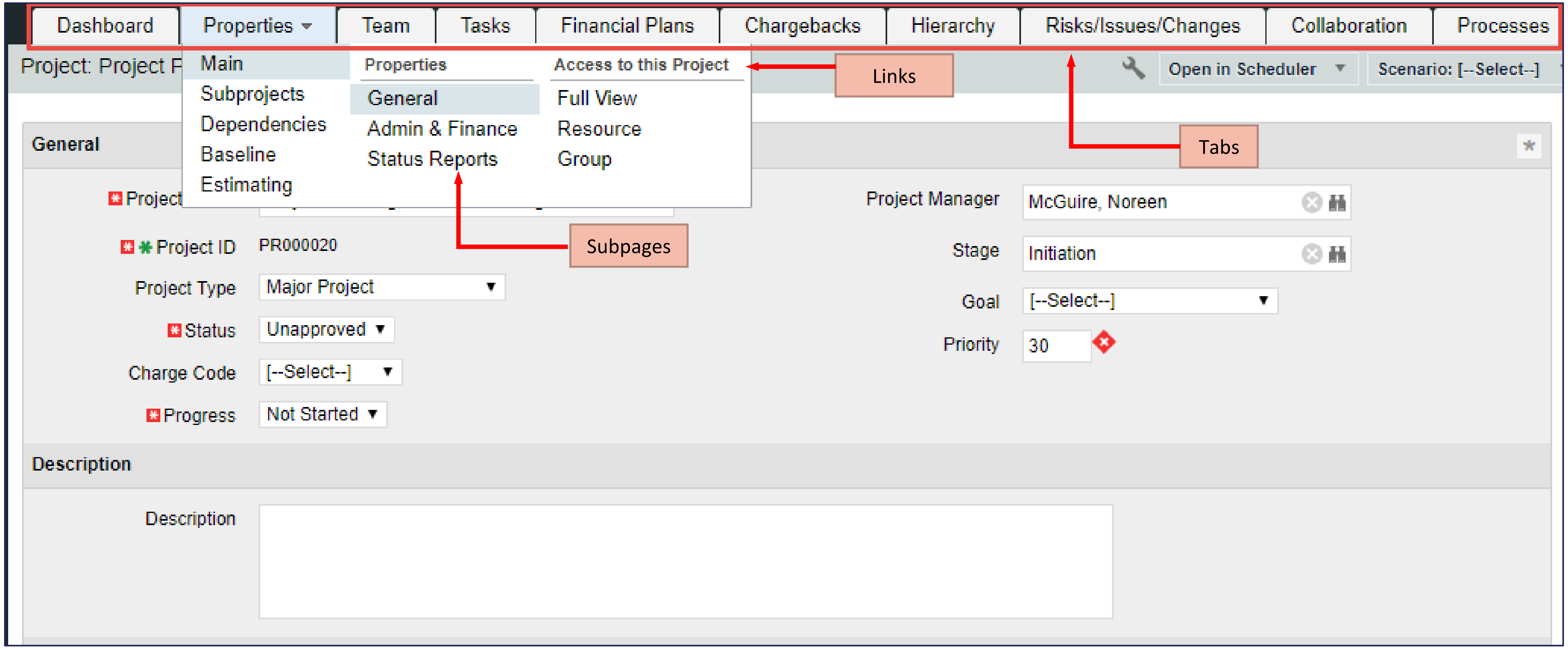
Project List view displays all the projects to which the end user has access and is divided into two sections

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



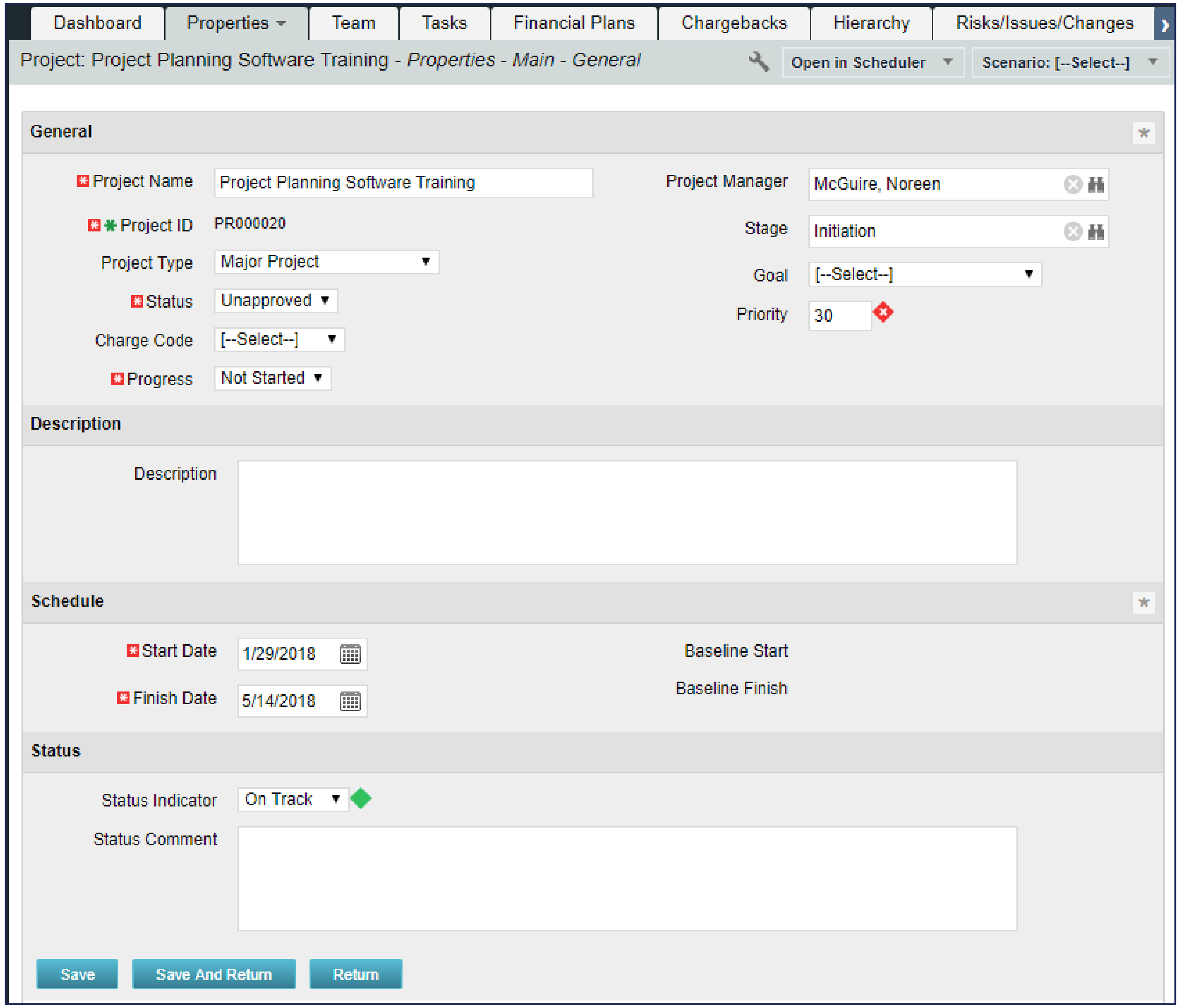
Project Properties and Subpages

- 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



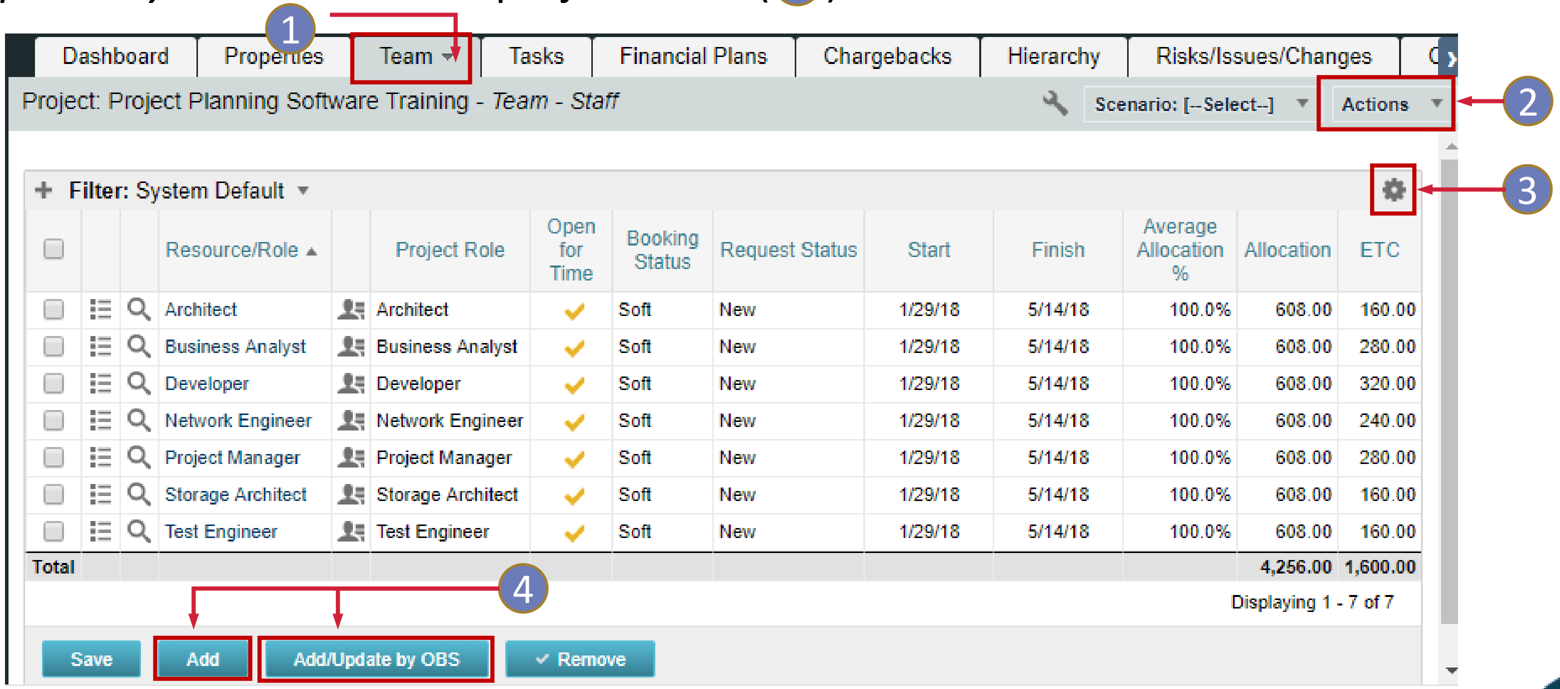
Project Security

- 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



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)



Part IV:
Work Breakdown Structure

The Tasks Tab

Task Properties

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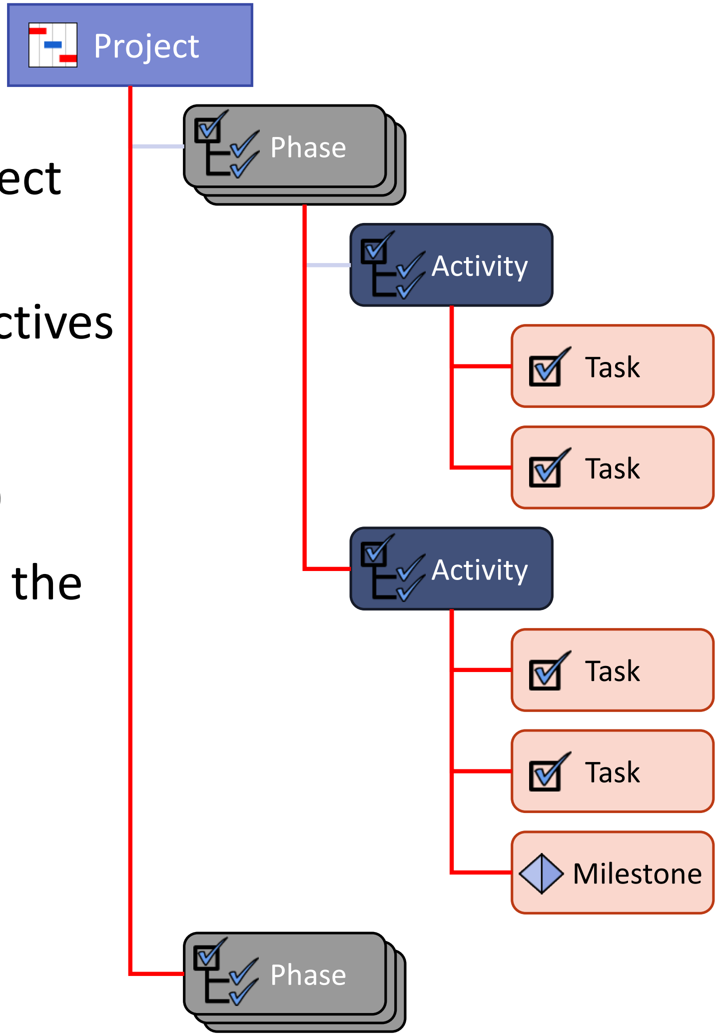
Work Breakdown Structure

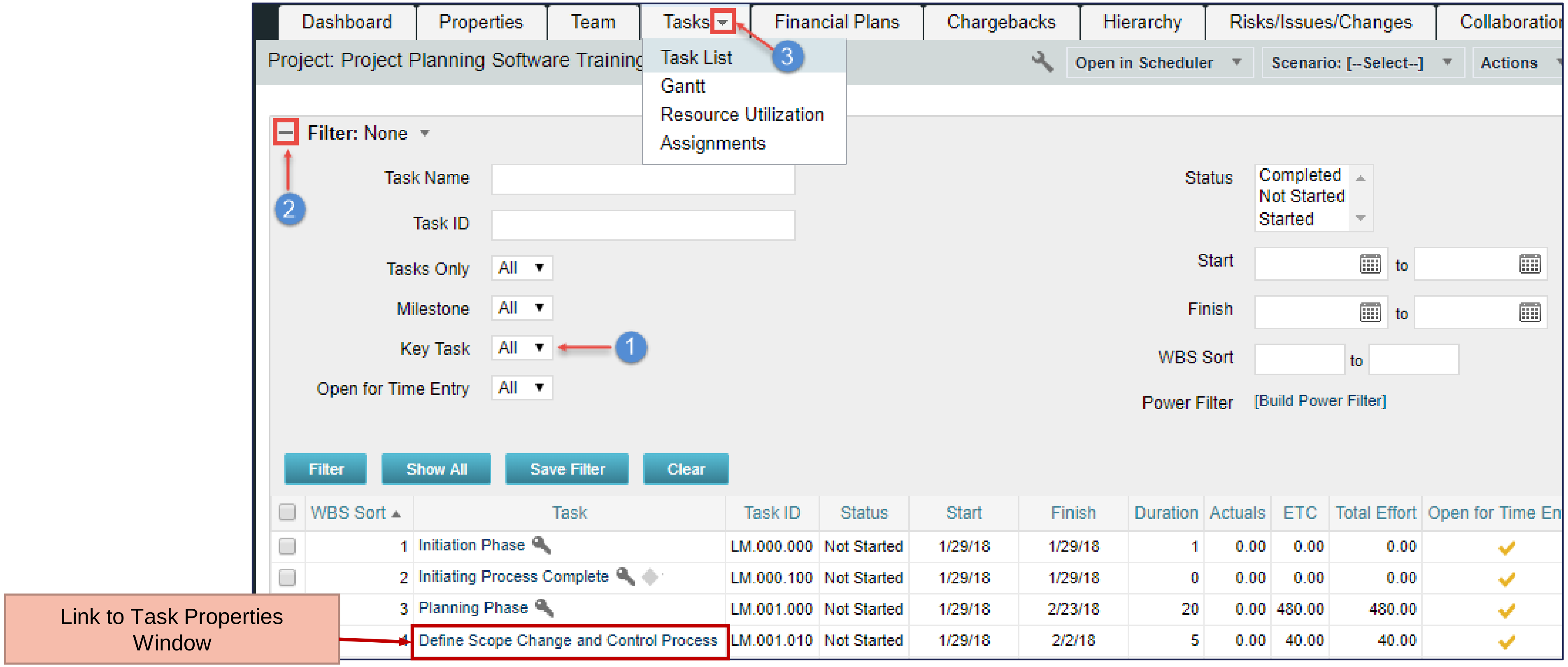
- WBS typically consists of phases, activities, and tasks
  - Phases are the major steps required to achieve a project goal
  - Activities are established to complete the phase objectives
  - Activities are split into tasks to break up the work
  - Milestones have no duration and no work effort (ETC)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



Tasks Tab

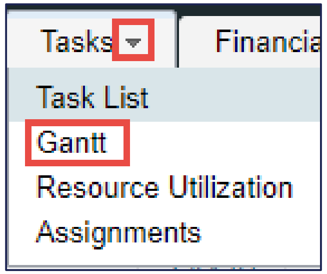
The Task Tab contains information and sub-pages pertaining to the work breakdown structure.

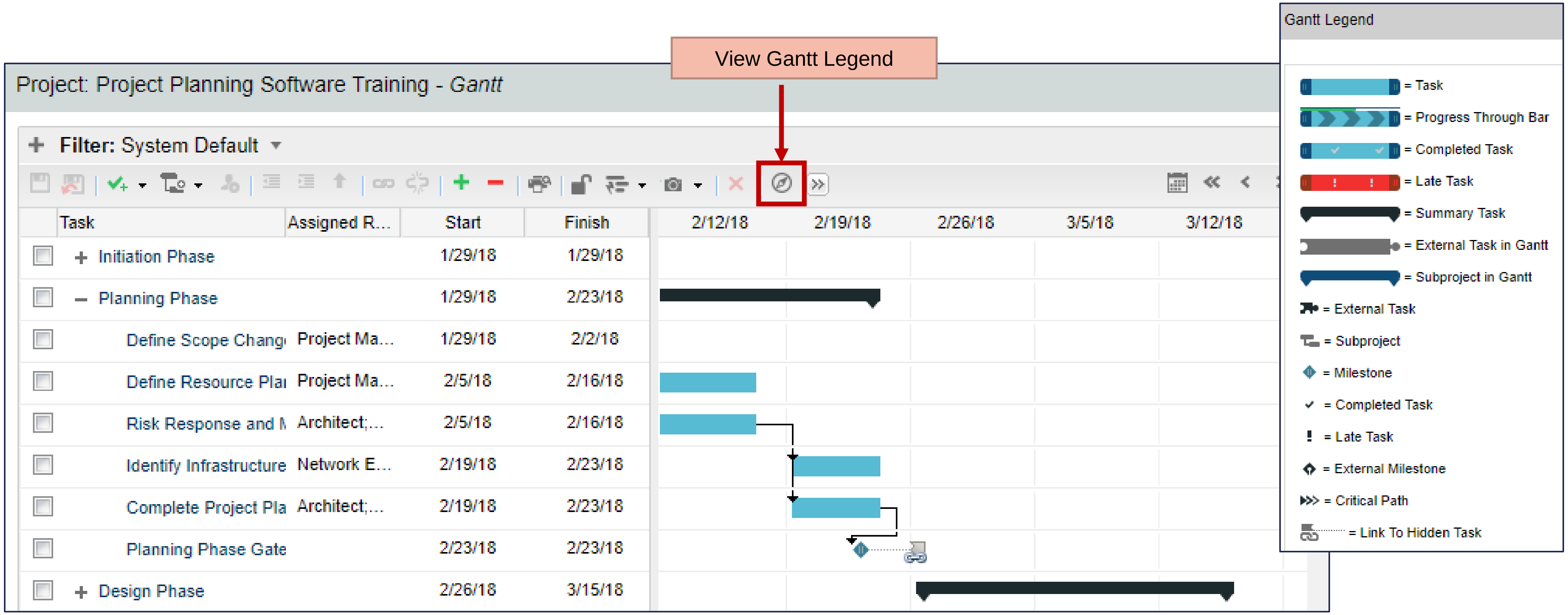
- The Task List may be filtered to display only those tasks that have been marked as “Key Tasks” (1)
  - Click the +/- icon to show/hide the filter (2)
  - Click the down arrow to view additional sub-pages (3)



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

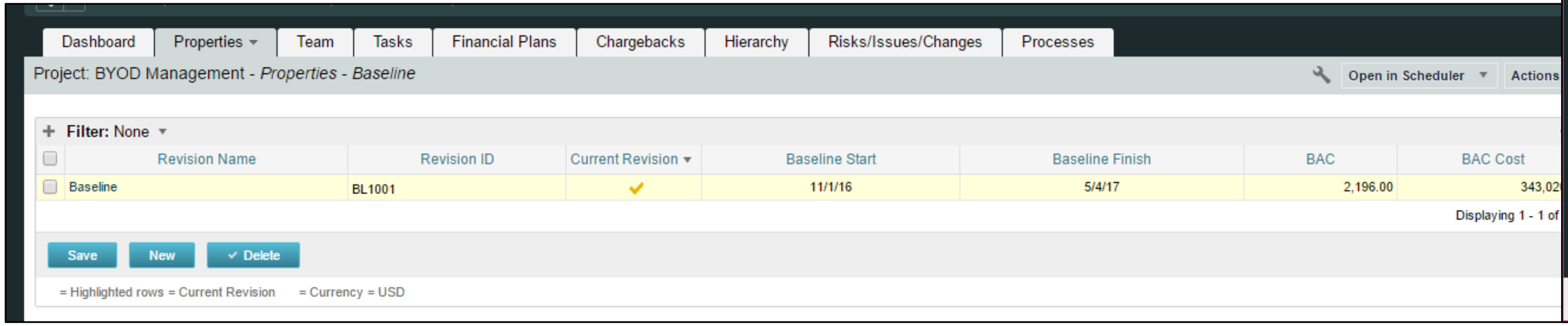


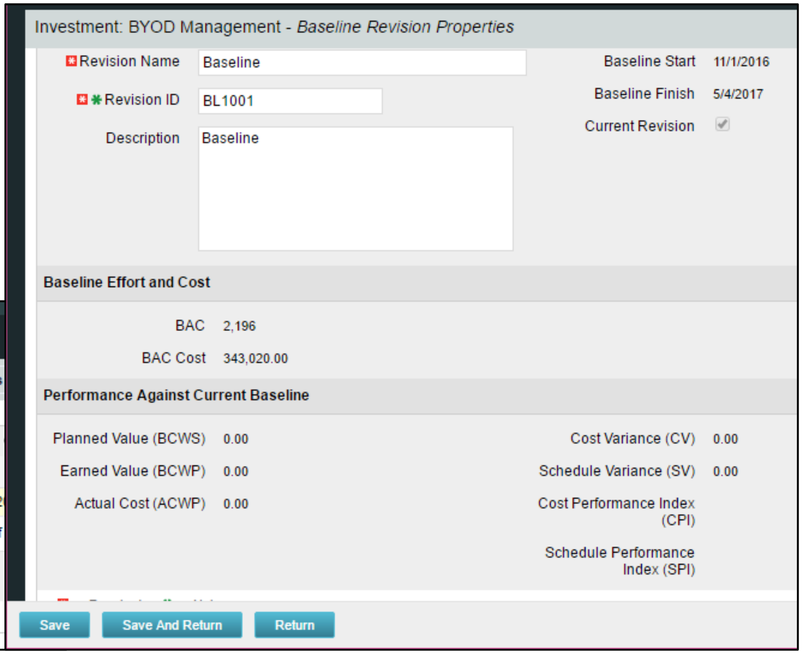


Baselining

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





Part V:
Resource Assignments to Tasks

Create an Assignment

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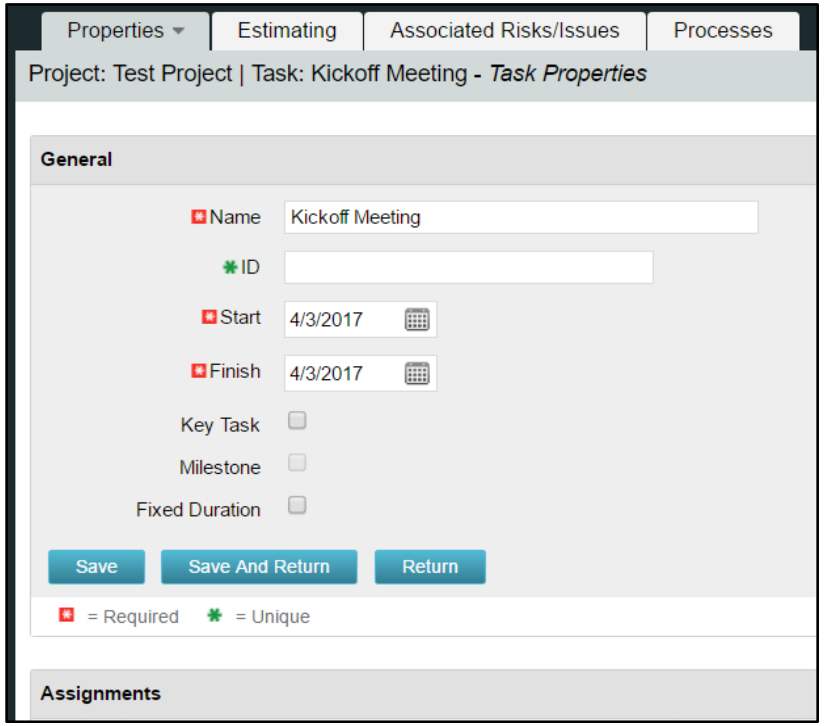
Assigning Resources and Roles to Tasks

- 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



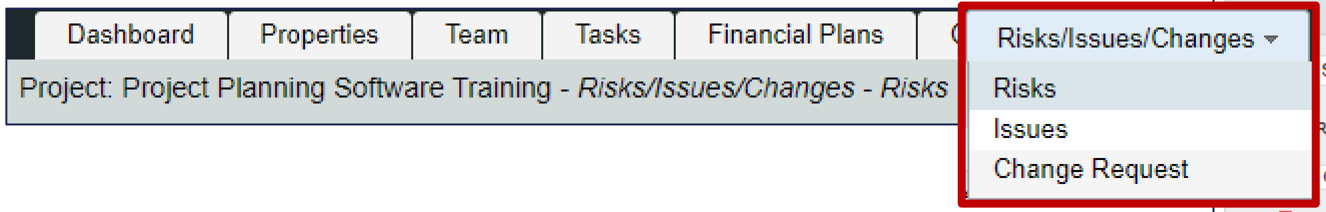
Part VI:
Project Sub-Objects

Risks and Issues

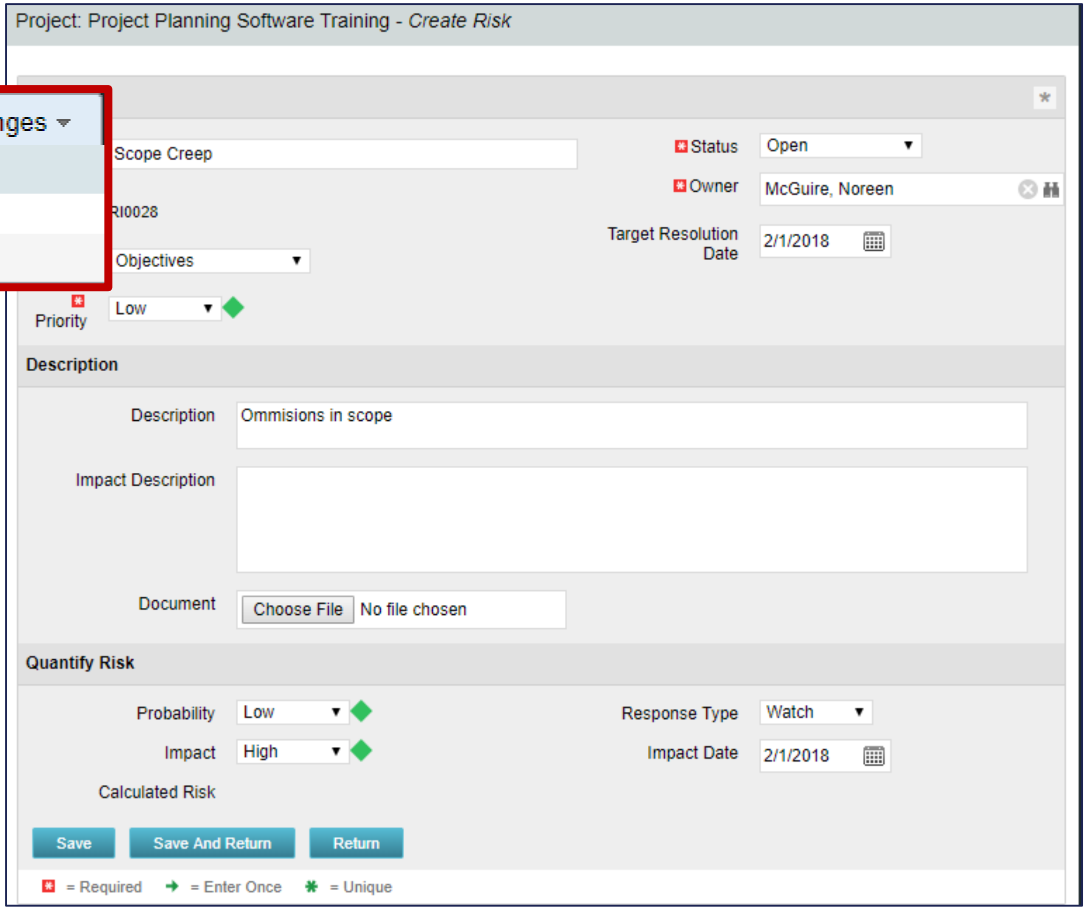
- Risks and Issues can be identified at any time during a project's lifecycle
- A Risk can escalate to an Issue, and an Issue can downgrade to a Risk
- Both Risks and Issues can create Change Requests
- You can also enter a Change Request from scratch
- Risks can tie back to the Risk Subpage, allowing 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



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

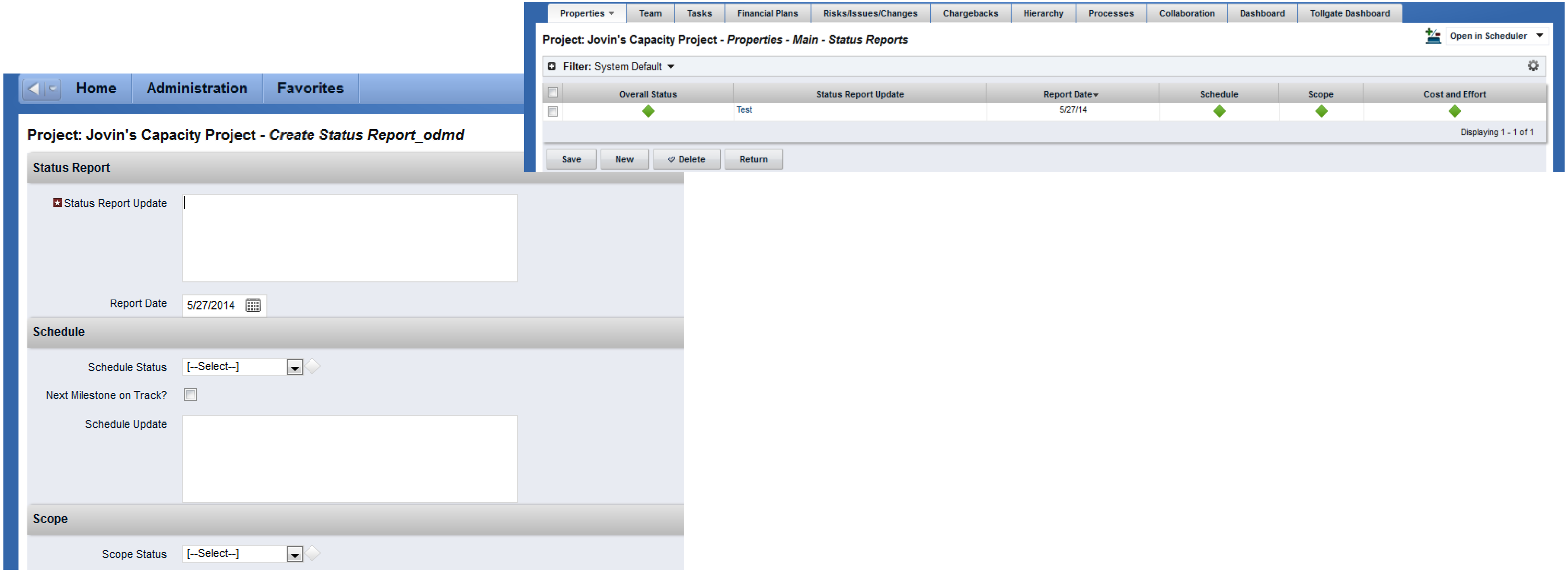
	Change Request	ID	Status	Owner	Priority	Review Date	Expected Close Date	Closure Date	Change in Cost	Change in Schedule	Change in Resources
	New Change Request	CR000002	Open	Ensinger, Rob		2/15/18	3/1/18		20,000.00	14	2

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



Part VII: Financial Plans

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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

	Cost Type	Transaction Class	Planned	Actual	Variance		Jan 1, 2014-Jan 31, 2014	Feb 1, 2014-Feb 28, 2014
	Capital	Hardware	40,000.00		40,000.00	Planned Actual Variance	0 0	40,000 40,000
	Capital	Labor	473,600.00	4,000.00	469,600.00	Planned Actual Variance	2,400 0 2,400	92,700 4,000 88,700
	Capital	Software	60,000.00		60,000.00	Planned Actual Variance	0 0	60,000 60,000
	Operating	Hardware	38,000.00	28,000.00	10,000.00	Planned Actual Variance	0 0 0	38,000 28,000 10,000
	Operating	Labor	2,485,600.00		2,485,600.00	Planned Actual Variance	9,600 9,600	204,309 204,309
	Operating	Software	12,000.00		12,000.00	Planned Actual Variance	0 0	12,000 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?

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Thank You For Attending regoUniversity

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