

rego*U*niversity 2019

SAN DIEGO

Resource Management | OOTB Introduction

Your Guides: Mindy Calderon and Alyson Poston

Introductions

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



Agenda

- Introduction
- Resource Management Overview
- Resource Access/Properties
- Resource & Role Allocation
- Resource Views
- Resource Management in the Modern UX

Introduction

Discuss Rego Base Configuration

*rego*University 2019

SAN DIEGO

Let Rego be your guide.

Rego Base Configuration

- This demo environment has Rego's OOTB Base Configuration applied
- The base configuration is composed of 3 main activities:
 - Base setup of items – entity, fiscal periods, financial class fields with 1 value, datamart and other jobs, etc. without this, most of the OOTB views and jobs will not work.
 - Simplify the UI – Based on what we have seen with hundreds of implementations, we “hide” not delete certain OOTB fields and leave the most common fields. For example, Risk has about 50 fields, but most clients use only about 10. Another example is that project has 6 subpages with hundreds of fields, and most clients simplify to 2 subpages and about 50 fields. This is just for the initial sessions, after which, if the client needs them, we can unhide other OOTB fields. Status report is another example where there are about 20 fields and we hide 6 of them that 95% of our clients do not use.
 - Install several Rego accelerators for security groups, workflows, and portlets. We adjust the menu to include them – views that are most commonly used.

Resource Management Overview

Accessing Resources

Resource Properties

*rego*University 2019

SAN DIEGO

Let Rego be your guide.

Resource Management Definition

- Resource Management is the efficient and effective use of organization resources when they are needed
- Clarity Resource Management is the practice of managing resources in order to have the right resources working on the right projects, at the right time based on real time project timelines as the project is further defined
- Resource Management functionality in its totality includes forecasting capacity and demand, understanding over and under allocated resources and understanding how much time it has taken to deliver a specific project, or task. This functionality enables you to control and predict resource utilization throughout the Project lifecycle and across the organization

Why is Resource Management Important?

- Reduces risk by enabling management to easily identify resourcing constraints
- Enables alignment of resources to the highest priority projects
- Reduces the amount of manual efforts required to develop and maintain resource plans
- Improves ability to be more proactive and efficient in resourcing
- Creates transparency of resource information
- Provides consistent resource capacity vs. demand functionality and reporting at the resource, project, program and portfolio levels

Data Sources for the 4 A's

Resource Record → **Availability** and Role Association

- Represents overall time the resource has to perform work
- Hours on the calendar represent capacity
- Attributes (Role, Primary Skill) used for capacity

Team → **Allocations**

- Allocated commitment of resource/role
- Start/Finish/Effort per Investment

Task → **Actuals**, ETC and **Assignments**

- Actual work from timesheet
- Remaining work (ETC)

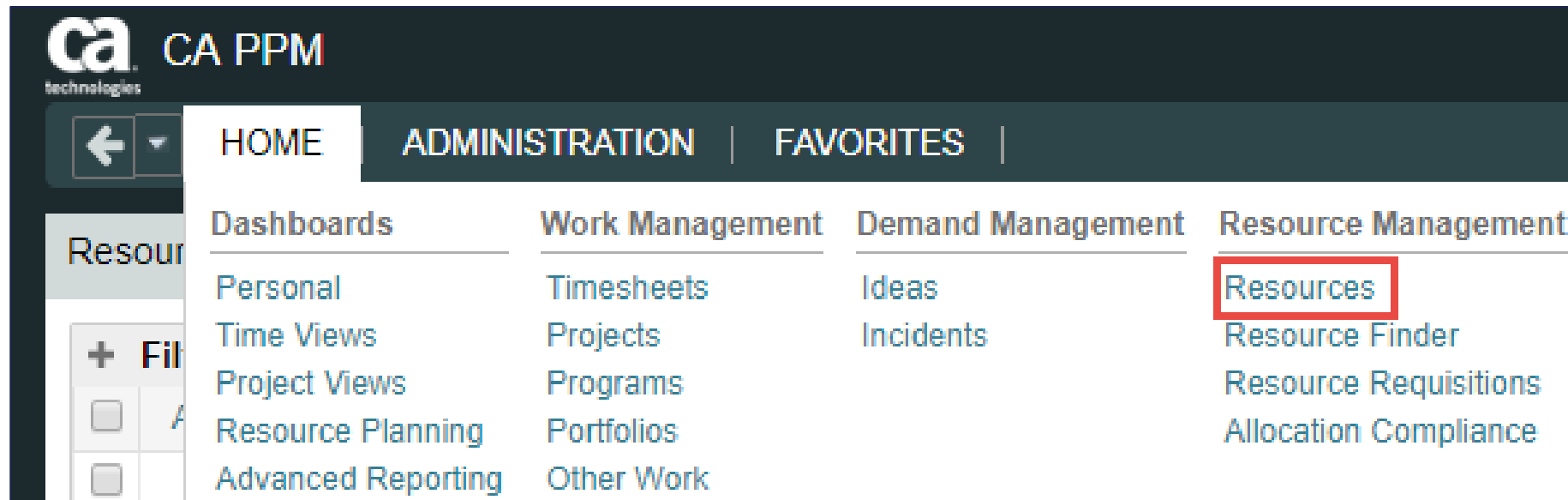
Resource Access / Properties



Let Rego be your guide.

Access Resources

- To access resources, hover over Home, then click Resources under Resource Management.
- You can only access resources in the Classic UX.
- Note that navigation bar links and section headers may be different depending on how your Clarity administrator has configured the interface
 - Also be aware that access depends on having the correct security rights. (RMs typically have more access than team members who just enter time)



Resource List

Resource List view displays all the resources the end user has access to 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

Resource List

Filter: System Default

Resource/Role Name

Resource/Role ID

OBS Unit

OBS Unit - Filter Mode: Unit only

Resource Manager

Primary Role: All

Filter

Resource Type: All

Employment Type: All

Active: Yes

Is Role: All

Power Filter: [Build Power Filter]

Filter

Show All

Save Filter

Clear

Active	Resource/Role	Resource/Role ID	Email Address	Employment Type	Primary Role	Resource Manager
<input checked="" type="checkbox"/>	Admin, PMO	csk.admin	admin@mailserver.com	Employee		
<input checked="" type="checkbox"/>	Administrator, clarity	ppmjasperadmin	username@mailserver.com	Employee		CA On Demand, Administrator
<input checked="" type="checkbox"/>	Administrator, PPM	admin	support@regoconsulting.com	Employee		Administrator, PPM

Resource Security

- Access to the resource is controlled via Clarity Security Groups:
 - You may have read/write access or read only access to all resources
 - You may have read/write access to only those resources you are designated as RM
- Security Groups in Base Configuration:
 - Resource Creator (typically Admin)
 - View and/or edit resource
 - Book resources to projects
 - Report access

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

Project: Project Planning Software Training - Properties - Main - General

Open in Scheduler Scenario: [--Select--]

General

Project Name: Project Planning Software Training

Project ID: PR000020

Project Type: Major Project

Status: Unapproved

Charge Code: [--Select--]

Progress: Not Started

Project Manager: McGuire, Noreen

Stage: Initiation

Goal: [--Select--]

Priority: 30

Description

Description

Schedule

Start Date: 1/29/2018

Finish Date: 5/14/2018

Baseline Start

Baseline Finish

Status

Status Indicator: On Track

Status Comment

Save Save And Return Return

Accessing Resources

1. Home > Resource Management > Resources
2. Click on the **+** sign to expand the filter
3. Enter **filter criteria** (optional)
4. Click **Filter**
5. Click on the **Resource** in the list to open

Resource List

Filter: System Default

Resource/Role Name

Resource/Role ID

OBS Unit

OBS Unit - Filter Mode

Resource Manager

Primary Role

Resource Type

Employment Type

Active

Is Role

Power Filter [Build]

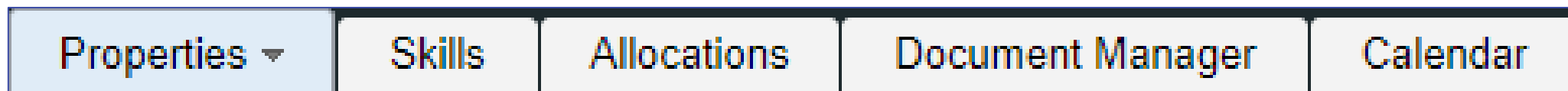
Base Configuration – Resource Filter section is simplified

Filter Show All Save Filter Clear

<input type="checkbox"/>	Active	Resource/Role ▲	Resource/Role ID	Email Address	Employment Type	Primary Role	Resource Manager
<input type="checkbox"/>	✓	Admin, PMO	csk.admin	admin@mailserver.com	Employee		
<input type="checkbox"/>	✓	Administrator, clarity	ppmjasperadmin	username@mailserver.com	Employee		CA On Demand, Administrator
<input type="checkbox"/>	✓	Administrator, PPM	admin	support@regoconsulting.com	Employee		Administrator, PPM
<input type="checkbox"/>	✓	Administrator, XC	xc_admin	xc_admin@mailserver.com	Employee		Administrator, PPM
<input type="checkbox"/>	✓	Architect	csk.architect				
<input type="checkbox"/>	✓	Bolin, Rod	rbolin	claritydev@regoconsulting.com_DNU	Employee		Joshi, Navdeep

The Resource Profile

- In order for Resource Management to function appropriately, it is necessary for the fundamental resource data within Clarity to be current and accurate at all times
 - Properties Tab– Provides the detail that feeds into the overall functional capabilities of the resource (Role) and the amount of time the resource is able to work (Availability)
 - Skills Tab – Identifies the abilities of a resource to perform tasks within a project.
 - Allocations Tab– The commitment of the resource to work a set amount of time on a project
 - Document Manager Tab – Provides repository for documents associated to resource. (e.g. Signed Non-Disclosure Agreement)
 - Calendar Tab – Aligned to the organization's holidays and planned days off. Determines days the resource is available to work on projects



Resource Properties

- Base Configuration - General
 - Sections organized
 - Attributes renamed, hidden or moved to other subpages
 - Defaults set
 - Time reporting periods created
 - Properties tab dropdown updated with concise subpage options

The screenshot displays the 'Resource Properties' form with the following details:

- Properties Tab Dropdown:** Main, Financial, Contact Information, Properties, General, Admin, Access to this Resource, Full View, Resource Group.
- Form Fields:**
 - Last Name: Bolin
 - First Name: Rod
 - Resource ID: rbolin
 - Email Address: claritydev@regoconsulting.com_DNU
 - Booking Manager: Garvey, Sara
 - Resource Manager: Joshi, Navdeep
 - Primary Role: Project Manager
 - Employment Type: Employee
 - Availability: 8.00
- Organizational Breakdown Structures:** Department OBS
- Buttons:** Save, Save And Return, Return
- Legend:** * = Required, * = Unique

Resource Properties

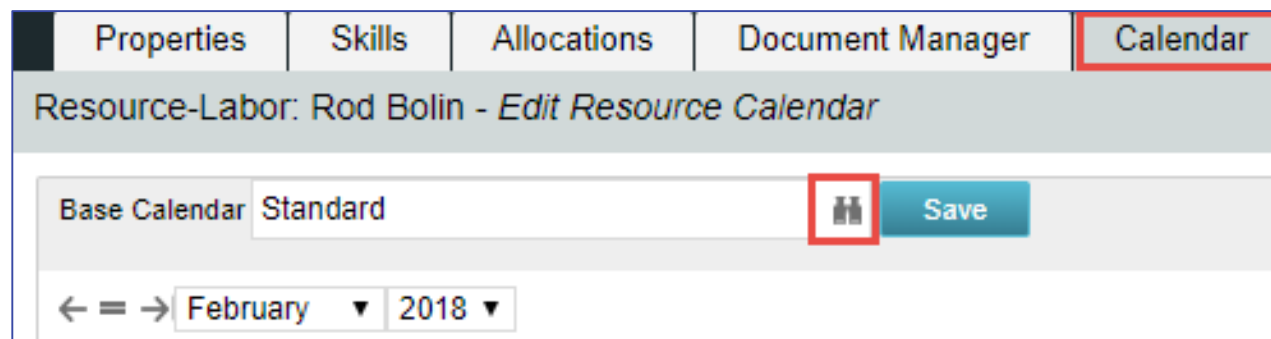
- Admin Subpage
 - Security restricted
 - Defaults set
 - Input Type code setup

Properties ▾	Skills	Allocations	Document Mana
Main	Properties	Access to this Resource	
Financial	General	Full View	
Contact Information	Admin	Resource Group	

Properties ▾	Skills	Allocations	Document Manager	Calendar
Resource-Labor: Rod Bolin - Main - Admin				
Admin				
Date of Hire	12/1/2014		Active	<input checked="" type="checkbox"/>
Date of Termination			External	<input type="checkbox"/>
Input Type Code	Regular	▾	Open for Time Entry	<input checked="" type="checkbox"/>
Track Mode	PPM	▾	Include in Datamart	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Save And Return"/> <input type="button" value="Return"/>				

Resource Calendar

- Each Resource is associated with a Base Calendar on the Calendar tab of their resource profile. The Base Calendar typically provides the corporate holidays for a particular region/location within the organization



- Base calendars and calendars for each country/region
- Calendar sets the capacity of the resource

Resource and Role Allocation

Allocating a Resource
Update Resource Allocation



Let Rego be your guide.

Allocating a Resource to a Project

- Once the resource profile is complete, the resource must be allocated to one or more projects on which they will perform work
- Allocation can be done in either the Classic or New UX.
- Depending on the delineation of responsibility within the organization, resource allocation may be done in one of two ways:
 - The Resource Manager (RM) allocates (or adds) resources to project teams from within the resource profile
 - The Project Manager (PM) allocates (or adds) resources to project teams from within the project structure

Three Types Of Booking Status

Soft Booking – Represents the ‘planned’ use of a role or resource on the project

- Roles are only Soft Booked
- Typically PMs have the ability to Soft Book named resources

Hard Booking – The ‘commitment’ of a named resource to the project

- Resources are Hard Booked
- Typically the RMs have the Hard Book right for their direct resources

Mixed Booking – Is a change in what was agreed to by the RM

- Mixed Booking occurs when the Planned does not equal the Committed
- Typically occurs when the PM needs to change the planned (Soft Booking)
- Mixed booking is not supported in the New UX, until version 15.7.
 - If Mixed booking is enabled in 15.7, the Staffing Views do not work.

Allocating a Resource in the New UX – From the Project

*rego*University 2019
SAN DIEGO

Let Rego be your guide.

Allocating a Resource to a Project – via Project

- Navigate to the *Staff* tab within a project.
- Click the “+” icon, then select the resource.

Clarity PPM A fantastic Project
P00000047

DETAILS **STAFF** TASK LIST TASKS ASSIGNMENTS RISKS ISSUES

↓

Group By

Resource ↑	Role	*Booking S...	Open For Ti...	Start	Fin...
Administrator...		Soft	✓		
DBA	DBA	Soft	✓		
Network Engi...	Network Engi...	Soft	✓		
Project Mana...	Project Mana...	Soft	✓		
Storage Archi...	Storage Archi...	Soft	✓		

*Resource ↑	Role	*Booking S...
sara		Soft
Garvey, Sara (sgarvey)		Soft
DBA	DBA	Soft
Network Engi...	Network Engi...	Soft
Project Mana...	Project Mana...	Soft

Update Allocation Default %

- Update allocation details in the *Default Allocation %* column.

*Resource ↑	Role	*Booking S...	Default All...	Open For Ti...	Start
Administrator...		Soft	100%	✓	
DBA	DBA	Soft	100%	✓	
Garvey, Sara	Project Mana...	Soft	50	✓	
Network Engi...	Network Engi...	Soft	100%	✓	
Project Mana...	Project Mana...	Soft	100%	✓	
Storage Archi...	Storage Archi...	Soft	100%	✓	

Update Resource Allocation by Period

- Update the time-period based allocations if necessary.

The screenshot shows a software interface for resource allocation. On the left, a settings panel is open, and on the right, a data table is displayed. A red box highlights the 'Garvey, Sara' row in the table, and another red box highlights the 'PER-PERIOD METRICS' section in the settings panel.

Settings Panel (Left):

- VIEW UNSAVED
- Search...
- MONEY DECIMAL DISPLAY: 0.00 0.0 0
- NUMBER DECIMAL DISPLAY: 0.00 0.0 0
- PER-PERIOD METRICS: Allocations
- PERIODS: Weeks
- START PERIOD: Dec 30, 2018-Jan 5, 2019
- END PERIOD: Dec 30, 2018-Jan 5, 2019

Data Table (Right):

Group By			Dec 30, 2018-J...	Jan 6, 2019-Ja...	Jan 13, 2019-J...	Jan 20, 2019-J...	Jan 27, 2019-F...	Feb 3, 2019-Fe...	Feb 10, 2019-F...	Feb 17, 2019-F...
*Resource ↑	Actuals	ETC	Allocations	Allocations	Allocations	Allocations	Allocations	Allocations	Allocations	Allocations
Administrator...	0	0	15	0	0	0	0	0	0	0
DBA	0	192	15	0	0	0	0	0	0	0
Garvey, Sara	0	0	75	50	50	50	0	0	0	0
Network Engi...	0	200	15	0	0	0	0	0	0	0
Project Mana...	0	192	16	0	0	0	0	0	0	0
Storage Archi...	0	200	15	0	0	0	0	0	0	0

Allocating a Resource in the New UX – From the Staffing View



Let Rego be your guide.

Allocating a Resource to a Project – via Staffing

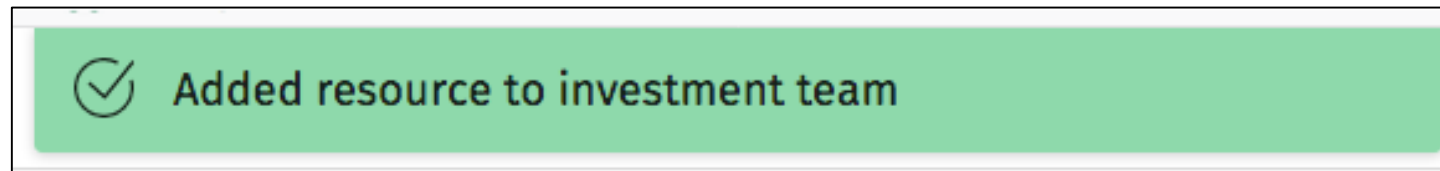
1. Navigate to the *Staffing* module, and ensure it is set to “Resources to Investments.” If necessary, click to swap the view
2. Next, set the filter. You may want to filter by yourself as RM.
3. Expand the resource you would like to Allocate.

	PINNED (0)	ALL	Feb 1, 2019-Feb ... FTE	Ma FTE
> Braden Marsh			1.12	
> Chris Shaffer			0.00	
∨ Christi Rice			0.00	
∨ Dylan Reese			0.95	
Genius Upgrade			0.00	
PTO			0.85	
2017-2018 Server Mainten...			0.10	
> Hannah Avery			1.93	
> Jen Scarlato			0.71	

Allocating a Resource to a Project – via Staffing

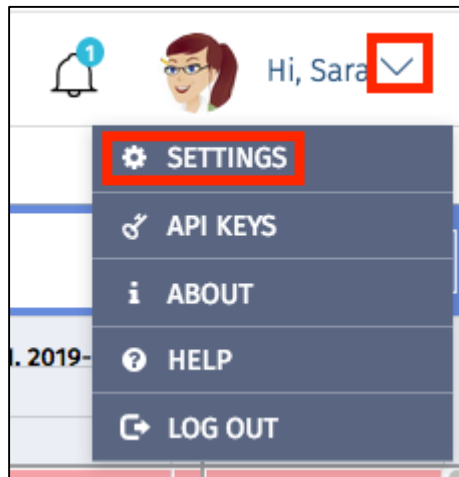
- Click the “+” then search for the project to which you will allocate the resource.
- A notification will appear indicating the resource has been added.

✓ Christi Rice	+	0.00
✓ Dylan Reese	+	0.95
🔍 tracking	CLOSE	
Training Time Tracking (P00000056)		0.00
PTO	×	0.85
2017-2018 Server Mainten...	×	0.10



Update Time Scale and Details

- Navigate to the *Settings* menu to update the timescale for which you are viewing allocation details.
- Note that available periods (e.g., weekly, monthly, quarterly, yearly) are based on the active Fiscal Periods within the system, not the time slices.



 A screenshot of the "STAFFING" settings page. The page has a dark blue sidebar with "PROFILE", "GENERAL", and "STAFFING" (highlighted in red). The main content area includes:

- START PERIOD:** Feb 1, 2020 (highlighted in red)
- REVERT TO DEFAULT SETTINGS:** A blue button in the top right.
- TIME PERIOD SPAN:** A section with a description: "Select a period type for each span. You can create a total of 60 time periods across all time period spans." It contains four rows:
 - 1: Monthly (dropdown) with a value of 12 (highlighted in red)
 - 2: Optional (dropdown) with an empty input field (highlighted in red)
 - 3: Optional (dropdown) with an empty input field
 - 4: Optional (dropdown) with an empty input field
- UNIT OF MEASURE:** Radio buttons for "FTE" and "Hours" (with "Hours" selected, highlighted in red).
- DECIMAL DISPLAY:** Radio buttons for "0.00", "0.0", and "0" (with "0.00" selected).
- CURRENCY:** \$USD
- ALLOCATION THRESHOLD:** A section with a description: "The Resources to Investments view determines the telescope gradient colors based on allocation data by resource. Set the gradient scale to indicate resources that need your attention over any time period. Hover over any color to see the threshold range." Below this is a "HEAT MAP" section with a color gradient from green to red. The "UNDER: 30%" and "OVER: 10%" labels are highlighted in red.

Update Time Scaled Allocation

- Update the time scaled allocation periods as necessary.

✓ Reed Campbell	🌙 ⊕	330.78	362.61	360.79	344.40	369.25
Genius Upgrade	🕒	172.79	188.81	187.00	178.50	195.50
Google Mail Transition	🕒	69.19	76.10	76.10	72.65	76.00
PTO	✕	88.81	97.69	97.69	93.25	97.69
✓ Bobby Elliott	🌙	160.00	0.00	0.00	0.00	0.00

Allocation Details

- View allocation details by clicking on a Project (or Resource) Name.
- Update Allocation details, including Allocation %
- Not editable from within the project.

The screenshot displays a resource management interface. On the left, a sidebar contains navigation icons, with a person icon highlighted in a red box. The main area is divided into 'Resources' and 'Requests' sections. The 'Resources' section shows a table of resource allocations for the period 2017-09. The 'Requests' section shows a table of resource requests for the same period. On the right, a detailed view for 'James Gille' is shown, with the 'Allocation %' field highlighted in a red box and set to 100.

Resources		2017-09	
		HOURS	FORECAST
PINNED (4) ALL		2,150.40	76
James Gille		134.00	9
APJ Research and Development Center (AS1010)		84.00	4
Quintiles Project 1		50.00	5
Jason Berry		84.00	4
Joe Almeida		1,235.60	1
Paul Berks		0	
Rod Bolin		168.00	
Ross Hensel		302.00	30
Sara Garvey		226.80	31
Sarah Preston		0	

Requests		2017-09	
		HOURS	FORECAST
		504.00	13
Architect		336.00	13
Business Analyst		168.00	

James Gille
API Research and Development Center (AS1010)

DETAIL CONVERSATIONS

INVESTMENT
APJ Research and Development Center (AS1010)

INVESTMENT MANAGER
Carlos Perez

ALLOCATION DATES
START DATE: Apr 01 2016
FINISH DATE: Mar 31 20...

ALLOCATION %
100

INVESTMENT ROLE
Architect

BOOKING STATUS *
Hard

FORECAST RATE
50

Open for Time Entry

Resource Management in the Modern UX


*rego*University 2019


SAN DIEGO





Let Rego be your guide.

Staffing Overview

- 15.2 introduced Resource Management/Staffing functionality
- View and Edit Resource Allocations
- Green/Red threshold highlighting
- Does not support mixed bookings.

Current Time Period  FTE Forecast

Resources Investments Select Filters 

	2017-03	2017-04	2017-05	2017-06	TOTALS
	FTE	FTE	FTE	FTE	FTE
× PINED (3) ALL	4.20	3.95	3.95	3.85	0.74
★ ∨ Andy Cooper  	0.80	0.65	0.65	0.65	0.14
Collaboration Initiative	0.40	0.40	0.40	0.40	0.04
Industry Trade Show	0.40	0.25	0.25	0.25	0.10
Personalized online shoppin...	0	0	0	0	0
★ > Derrick Joseph 	0.70	0.90	0.90	0.90	0.21
★ > Diane Durand 	2.70	2.40	2.40	2.30	0.40

Role Requests

- Use the *Resource Manager* field on role requests to indicate the individual responsible for staffing the request

The screenshot displays a software interface for resource management. It is divided into two main sections: 'Resources Investments' and 'Requests'.

Resources Investments Section:

- Header: 'Resources Investments' with a 'RESOURCE MANAGER' dropdown set to 'Ross Hensel' and a search bar.
- Table for '2017-09':

	HOURS	FORECAST
TOTAL	2,150.40	76,520
> James Gille	134.00	9,200
> Jason Berry	84.00	4,200
> Joe Almeida	1,235.60	1,000
> Paul Berks	0	0
> Rod Bolin	168.00	0
> Ross Hensel	302.00	30,200
> Sara Garvey	226.80	31,920
> Sarah Preston	0	0

Requests Section:

- Header: 'Requests' with a 'RESOURCE MANAGER' dropdown set to 'Ross Hensel' and a search bar.
- Table for '2017-09':

	HOURS	FORECAST
TOTAL	504.00	13,440
Architect	336.00	13,440
Quintiles Project 1	168.00	13,440
SG - Test Project	168.00	0
> Business Analyst	168.00	0
> Sr. Developer - Java	0	0

Architect Detail Panel (Right Side):

- Project: Quintiles Project 1 (PRJ00000017)
- Investment Manager: Joyce Bauer
- Allocation Dates: Start Date Jan 01 2017, Finish Date Nov 30 2017
- Allocation %: 100
- Forecast Rate: 80
- Role Request: Architect
- Resource Manager: Hensel, Ross (highlighted with a red box)
- Allocate To: Architect
- Button: CONFIRM ALLOCATION

A red arrow points from the 'Quintiles Project 1' row in the 'Requests' table to the 'Resource Manager' field in the 'Architect' detail panel.

New UX: Resource Management (2)

- Pin specific Projects so they appear in the list first
- Copy and Paste functionality in cells (similar to excel)
- Ability to view allocation by investment or resource

Investments Resources			Select Filters					
			2017-02	2017-03	2017-04	2017-05	2017-06	TOTALS
			FTE	FTE	FTE	FTE	FTE	FTE
×	PINNED (0)	ALL	39.80	39.33	49.84	49.32	47.84	41.19
∨	B2B Enhancements	⊕	6.00	6.00	4.55	4.45	4.40	4.82
	Dudley Danes	📌	0.70	0.70	0.20	0.20	0.20	0.31
	Hank Fisher	×	0.40	0.40	0.20	0.20	0.15	0.22
	Mike Jones	×	0.40	0.40	0.40	0.30	0.30	0.31
	Nicole Fleming		0.20	0.20	0.20	0.20	0.20	0.20
	Peter Phillips	📌	0.50	0.50	0.20	0.20	0.20	0.33
	Ray Fowler	×	0.60	0.60	0.15	0.15	0.15	0.25

New UX: Resource Management (3)

Clear All Pinned Items
(Works in both the Pinned and All tabs)

Conversations
(Will only display if you have a conversation)

Open Requests
(Will only display if you have open requests)

Add/Remove
(+: Add child record, X: Removes child record)

Over/Under Allocation
(Green=Under, Red=Over) ***

Request Status
(Cell Color: Soft=Blue, Hard=White)

Pinning
(Hover and Click to Pin a Record. When pinned, icon is always visible)

Inactive
(Cell Color=Light Grey) *

Read-Only
(If this area is blank, you have read-only access. Cell values are greyed out)

Locked Record
(Grey text and cell values) **

Actuals
(Actuals posted for this record) **

Date Boundaries
(Blank indicate cells are outside investment dates)

* Inactive color has precedence over Request Status color.
** Lock and Actuals icons have precedence over "X" icon.
*** For the Investment to Resource view, it only displays red for over-allocation

CA PPM		Current Time Period							
Resources Investments		Select Filters							
		2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	2017-08	
		FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE
Pinned (2)		5.48	4.68	6.45	6.64	4.50	4.00	4.00	
Adriana Ramos		3.00	3.00	3.00	3.00	2.45	2.00	2.00	
4G Upgrade Readiness		1.00	1.00	1.00	1.00	0.45	1.00	1.00	
eBusiness Mobile Network		1.00	1.00	1.00	1.00	1.00	1.00	1.00	
Mobile Time and Approvals		1.00	1.00	1.00	1.00	1.00	1.00	1.00	
Alex Garcia		0.53	0.68	1.45	0.90	0.05	0	0	
eBusiness Mobile Network		0	0	0	0	0	0	0	
Executive Dashboard Visibility		0.25	0.13	0.90	0.35	0.05	0	0	
Learning Management System Upgrade		0.28	0.55	0.55	0.55				
Alex Riviera		1.95	1.00	2.00	2.74	2.00	2.00	2.00	
Client Services Datamart		0.95	0	0	0.74				
eBusiness Mobile Network		1.00	1.00	1.00	1.00	1.00	1.00	1.00	
Upgrade Technology Center				1.00	1.00	1.00	1.00	1.00	

Project Assignments View

- The *Assignments* tab provides the ability to create and manage resource assignments all in one view.

- Utilizes the standard grid view with filters, saved views, export to .csv, etc.

	*Resource	*Start	*Finish	Actuals	ETC	Total Usage	Jan 2020	Feb 2020	Mar 2020	Apr 2020
							ETC	ETC	ETC	ETC
+ Task ↑										
Complete Project Plan	Business Anal...	Jan 01 2020	May 12 2020	0	5		10	10	0	
Complete Project Plan	Architect	Jan 22 2020	Jan 28 2020	0	1		0	0	0	
Complete Project Plan	Project Manag...	Jan 22 2020	Jan 28 2020	0	1		0	0	0	
Complete Project Plan	Business Anal...	Jan 22 2020	Jan 28 2020	0	1		0	0	0	
Complete Project Plan	Project Manag...	May 06 2020	May 12 2020	0	1	1	0	0	0	0
Complete Project Plan	Architect_csk	May 06 2020	May 12 2020	0	1	1	0	0	0	0
Database Development	Developer_csk	Jun 03 2020	Jun 09 2020	0	1	1	0	0	0	0
Database Development	Developer	Feb 19 2020	Feb 25 2020	0	1	1	0	0	0	0
Define Resource Plan	Project Manag...	Apr 22 2020	May 05 2020	0	1	1	0	0	0	0
Define Resource Plan	Project Manag...	Jan 08 2020	Jan 21 2020	0	1	1	0	0	0	0
Define Scope Change and Control...	Project Manag...	Apr 15 2020	Apr 21 2020	0	1	1	0	0	0	0

- Allows for the edit and update of TSV fields, along with other Assignments fields.
- Provides the new user-configurable Details Pane
- Allows for the creation of new Assignments.

Note: Time-scaled metrics utilize the fiscal periods, not the calendar periods. In order to view data in a particular manner (e.g., weekly), those fiscal periods must be set up for the selected time period.

Allocating a Resource in the Classic UX

*rego*University 2019

SAN DIEGO

Let Rego be your guide.

Allocating a Resource to a Project

- Access resource allocation details by clicking the Allocations tab within the resource profile
- Projects to which the resource has already been allocated are displayed in the list

Resource-Labor: Rod Bolin - Resource/Role Allocations													
Scenario: [--Select--]												Actions	
+ Filter: System Default													
			Investment	Investment Manager	Investment Role	Booking Status	Open for Time	Allocation Start	Allocation Finish	Average Allocation %	Allocation	Actuals	ETC
<input type="checkbox"/>			A Fantastic Project	Joshi, Navdeep		Soft	✓	2/2/15	4/30/18	100.0%	6,736.00	0.00	248.00
<input type="checkbox"/>			Online Application	Bolin, Rod		Soft	✓	11/29/17	3/1/18	25.0%	128.00	0.00	0.00
<input type="checkbox"/>			Online Application Idea	McGuire, Noreen		Soft	✓	11/29/17	3/1/18	25.0%	128.00	0.00	128.00
<input type="checkbox"/>			OWB Project	McGuire, Noreen		Soft	✓	1/29/18	5/14/18	100.0%	608.00	0.00	0.00
<input type="checkbox"/>			2018 Software Implementation Project	Bonham, Jessica		Soft	✓	10/2/17	4/30/18	10.0%	164.80	0.00	0.00
Total											7,764.80	0.00	376.00
Displaying 1 - 5 of 5													
<input type="button" value="Save"/> <input type="button" value="Add"/> <input type="button" value="Remove"/>													
Highlighted rows = Approved Flag													

Update Resource Allocation Details

- Clarity allows in line editing. Once a cell is selected, data on the screen will become editable. Update as necessary, then click Save:
- Allocation details can be updated by clicking the Properties (☰) icon

Resource-Labor: Rod Bolin - Resource/Role Allocations												
Scenario: [-Select-] Actions												
Filter: System Default												
	Investment	Investment Manager	Investment Role	Booking Status	Open for Time	Allocation Start	Allocation Finish	Average Allocation %	Allocation	Actuals	ETC	
<input type="checkbox"/>	A Fantastic Project	Joshi, Navdeep		Soft	✓	2/2/15	4/30/18	100.0%	6,736.00	0.00	248.00	
<input type="checkbox"/>	Online Application	Bolin, Rod		Soft	✓	11/29/17	3/1/18	25.0%	128.00	0.00	0.00	
<input type="checkbox"/>	Online Application Idea	McGuire, Noreen		Soft	✓	11/29/17	3/1/18	25.0%	128.00	0.00	128.00	
<input type="checkbox"/>	OWB Project	McGuire, Noreen		Soft	✓	1/29/18	5/14/18	100.0%	608.00	0.00	0.00	
<input type="checkbox"/>	2018 Software Implementation Project	Bonham, Jessica		Soft	✓	10/2/17	4/30/18	10.0%	164.80	0.00	0.00	
Total									7,764.80	0.00	376.00	

Displaying 1 - 5 of 5

Save Add Remove

Properties			
Investment: Online Application Idea Resource: Rod Bolin - Staff Member Properties			
General			
Investment Start Date	11/29/2017	Resource/Role	Bolin, Rod
Investment Finish Date	3/1/2018	Investment Role	
Start Date		Staff OBS Unit	
Finish Date		Resume Keywords	
Default Allocation %	25.00%	Open for Time Entry	<input checked="" type="checkbox"/>
Allocation	128.00		
Booking Status	Soft		
Planned Allocation		Hard Allocation	
<input type="checkbox"/>	Start	<input type="checkbox"/>	Start
<input type="checkbox"/>	11/29/2017	<input type="checkbox"/>	3/1/2018
<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	
25.00%		% Allocation	
New Row		Delete	
New Row		Delete	
Save		Save And Return	
Return			

Classic UX Resource Views

Dashboard and Portlet views

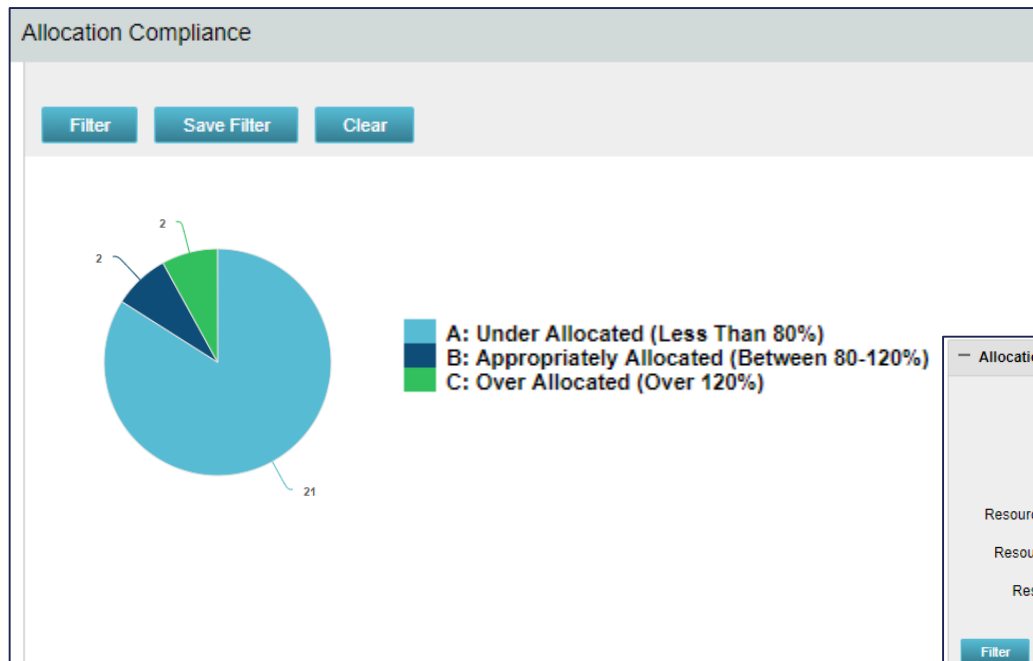
*rego*University 2019

SAN DIEGO

Let Rego be your guide.

Base Configuration Portlets – Allocation Compliance

- The Allocation Compliance List portlet is used in conjunction with the Allocation Compliance Pie Chart. Once the user selects a specific section of the chart, the Allocation Compliance List will display a list of resources fulfilling that selection



- Additional filter criteria can be used in the Allocation Compliance List

Allocation Compliance List

Allocated

Allocation %

Availability

Resource Internal ID

Resource Manager

Resource Name

Filter Show All Save Filter Clear

Resource Name	Resource Manager	Availability	Allocated	Allocation %
Bonham, Jessica	Administrator, PPM	512	640.12	125.0
Joshi, Navdeep	Administrator, PPM	512	632.00	123.4
Total Availability and Allocation & Average %		1,024	1,272.12	124.2

Displaying 1 - 2 of 2

Base Configuration Portlets

- Time Views: Time by Resource
 - Filter by Resource OBS, Resource or Investment
 - Time scale options: Annually Daily, Monthly, Quarterly or Weekly

Time Views: Time by Resource

Time by Investment | **Time by Resource** | % Time by Type | Missing Time by OBS

Time Views: Time by Resource

Time by Resource

Resource OBS:

Time-scaled Value: Weekly

Stat Date: 10/1/2017

End Date: 11/30/17

Resource:

Investment:

ID	Name	Resource	2017-10-02 Hours	2017-10-09 Hours	2017-10-16 Hours	2017-10-23 Hours	2017-10-30 Hours	2017-11-06 Hours	2017-11-13 Hours	Total to Dat
PR000001	2017 Integration Project	Bonham, Jessica	40			40		40		120
PR000003	2017 New Product Development	D'souza, Leo	40			40	40	40	40	200
PR000005	2017 Resource Project	Jena, Santanu	40	40		40	40	40		200
PR000008	2017 Security Project	Joshi, Navdeep	40	40			40	40		160
PR000001	2017 Integration Project	Kunkulol, Atul	40				40	40		120

Questions?



rego **U**niversity 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