



regoUniversity 2019

SAN DIEGO

Resource Manager | Best Practice "Day in the Life"

Your Guide: Josh Childers and Karen Lifsey

Introductions

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



Agenda

- “Best Practice” RM Process & Weekly Checklist
- Tips and Tricks
- Agile Team Resource Management Options
- Appendix: Resource Management Portlet Examples

Format of This Session

- In the next set of slides, Rego has compiled a set of best practice points related to functionality.
- It may seem choppy, because it is
- Each slide is a different best practice point, so there is not a “flow” between slides in many cases.
- All attendees are encouraged to ask questions, provide examples, and make this a collaborative working session.

Part II: “Best Practice” Resource Management Process

<Descriptor>



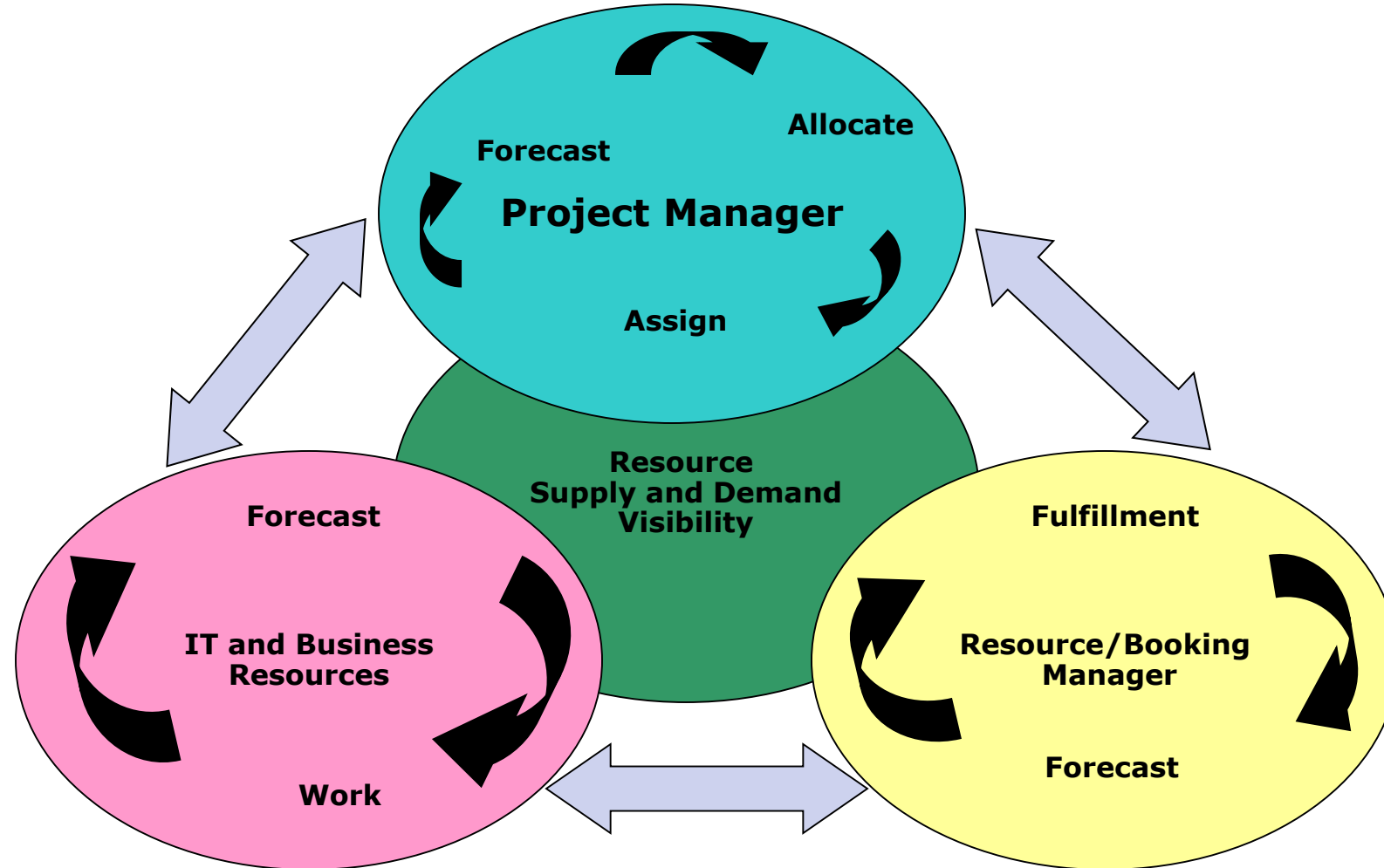
Let Rego be your guide.

Open Discussion #1

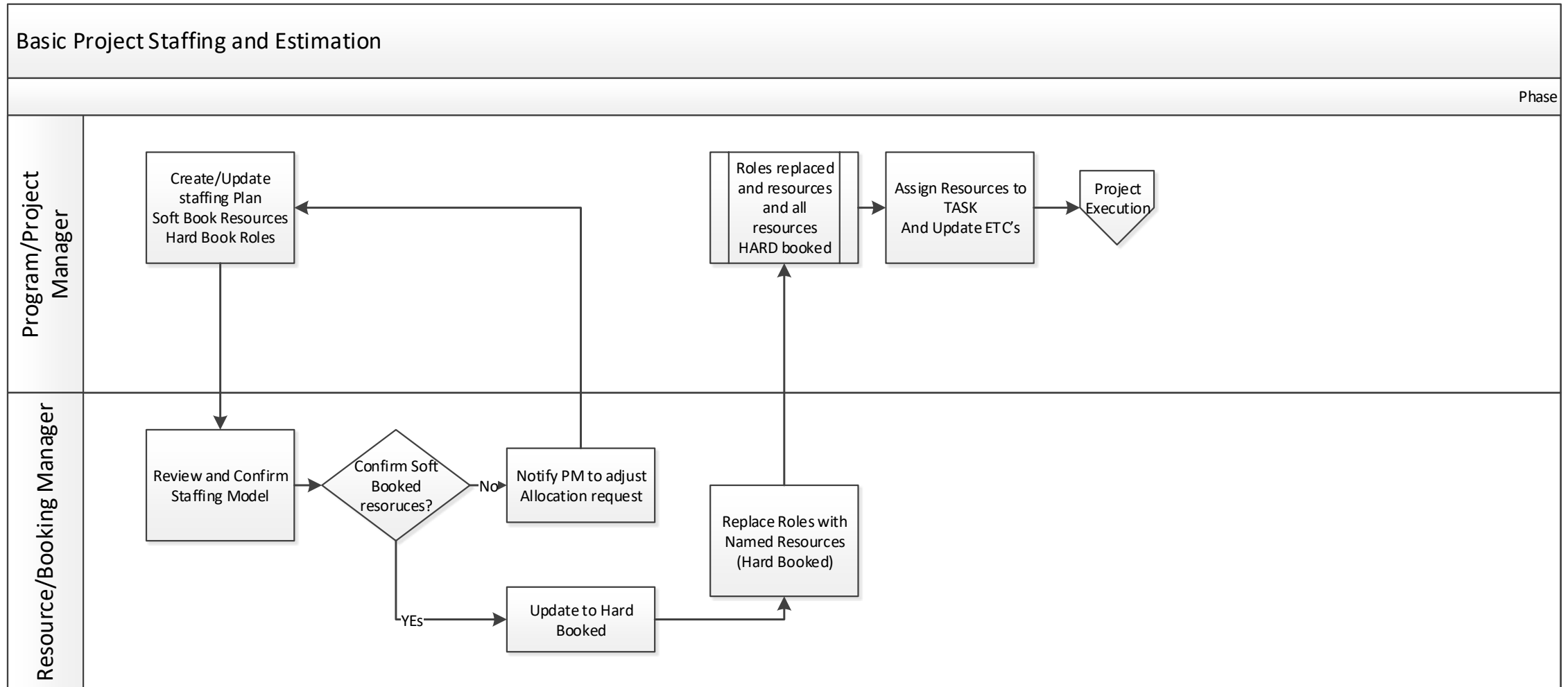
- What is your Resource Requisition and Fulfilment process?
- What is your weekly resource management routine?
- What steps in the process seem 'broken'?



Resource Supply and Demand Visibility



“Best Practices” Resource Management Process



Weekly Checklist For Resource Managers

Weekly Task	Why?
Review and approve timesheets	To ensure accuracy and compliance
Review Unfilled Allocations for your team/department.	Replace requested roles with named resources
Review your Resources to ensure appropriate utilization	To ensure resource is appropriately utilized. Inaccurate forecast can impact organizational staffing.
Review resource allocations (project level assignments) for accuracy.	To ensure resource forecast for each project is accurate Inaccurate forecast can impact organizational staffing.
Review 'All Assignments' to ensure resources are completing assignments on time and within appropriate amount of effort	To ensure resource is completing tasks on time and within appropriate effort.
Distribute Task Assignment Information to your Team	For people that may not have a Clarity license, send out Task updates by extracting the portlet.

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

Open Discussion #2

- How much time do you spend managing resource data?
- What best practices, tips or tricks have you discovered?
- Do you use Skills in your organization?



Part III: Tips & Tricks

<Classic>



Let Rego be your guide.

Tips And Tricks

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

The screenshot shows the 'Filter: None' section of the Resource Finder. The 'Is Role' filter is highlighted with a red box and set to 'No'. Below the filters is a table of resources.

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

Tips And Tricks

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

Filter: System Default																
			Resource/Role▲	Project Role	Booking Status	Start	Finish	Allocation	Actuals	ETC		Allocation By Period				
												Jan 16	Feb 16	Mar 16	Apr 16	May 16
			~Architect	~Architect	Mixed	12/1/14	11/30/15	1,771.00	0.00	0.00	Allocation Aggregate Allocation Resource Availability	7,084.12	7,185.71	8,124.23	7,689.71	7,259.71
			~Business Technology Partner	~Business Technology Partner	Mixed	12/1/14	11/30/15	177.10	0.00	0.00	Allocation Aggregate Allocation Resource Availability	4,098.90	4,155.20	4,718.10	3,937.50	3,500.00
			Dryden, Keith	~Project Manager	Soft	12/1/14	11/30/15	0.00	0.00	0.00	Allocation Aggregate Allocation Resource Availability	993.11 155.40	1,164.67 155.40	1,210.75 170.20	1,105.47 155.40	977.90 155.40
			~Information Management Specialist	~Information Management Specialist	Mixed	12/1/14	11/30/15	1,771.00	0.00	0.00	Allocation Aggregate Allocation Resource Availability	4,949.86	5,838.56	7,059.35	6,691.72	6,694.72
			Kloack, Dave	~Business Analyst	Mixed	12/1/14	11/30/15	1,720.40	83.50	10.00	Allocation Aggregate Allocation Resource Availability	895.00 142.80	929.00 142.80	881.80 156.40	718.20 142.80	660.40 142.80

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

Open Discussion #3

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

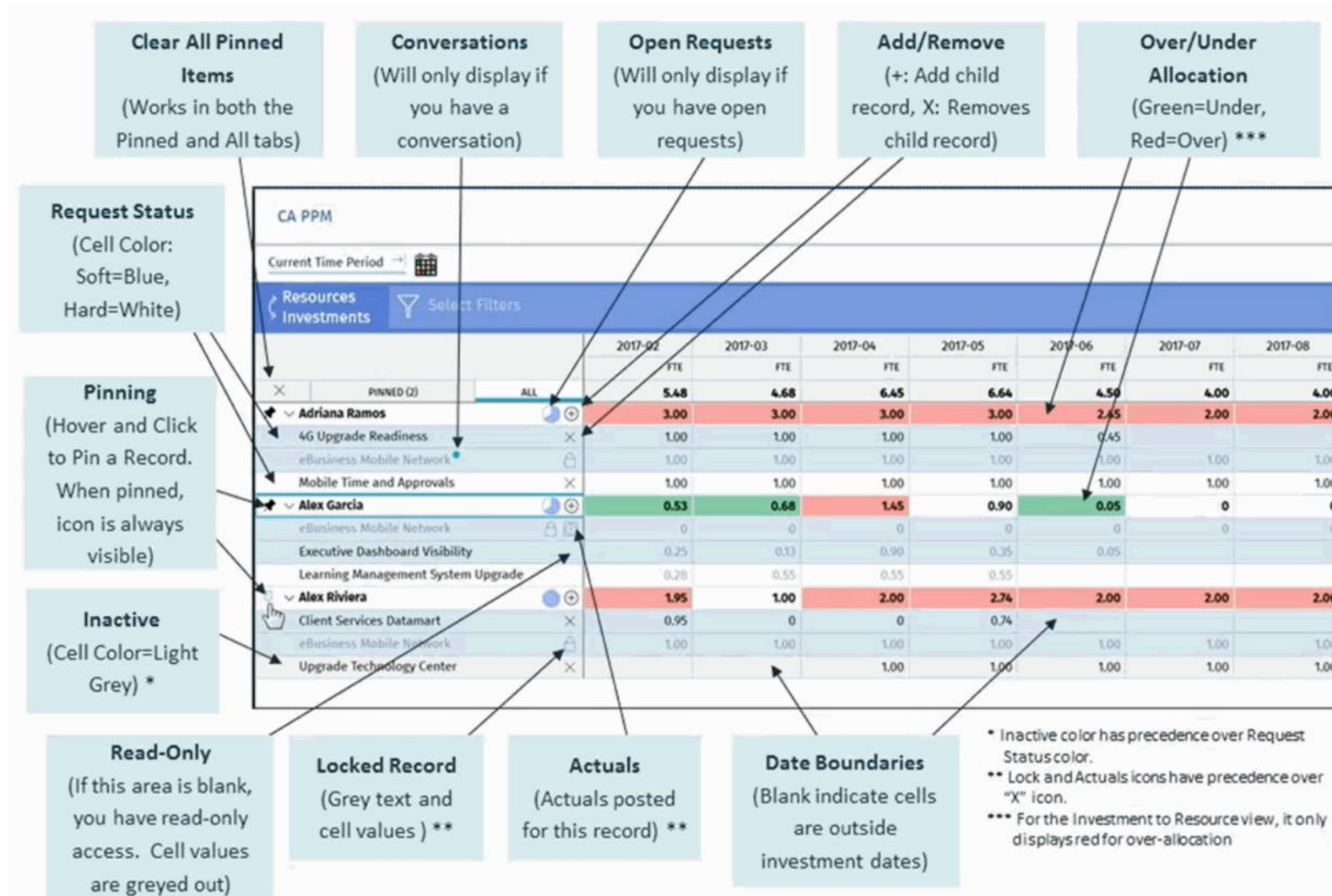


Modern UX: Resource Management Allocation View

- 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

Modern UX: Resource Management



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.

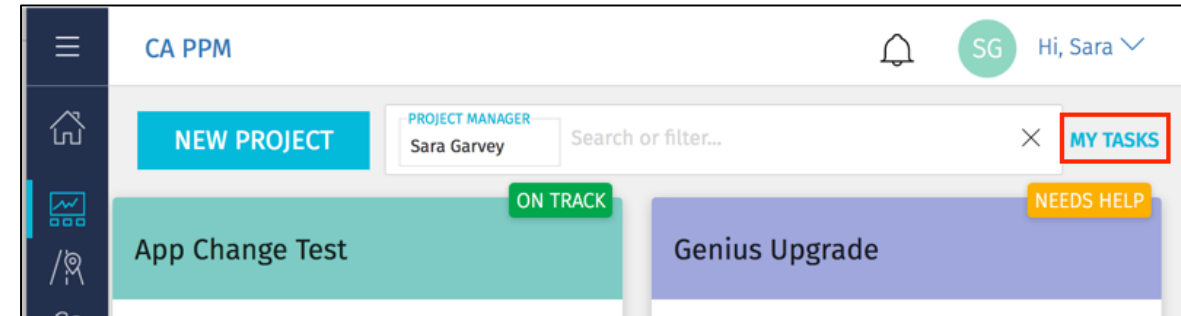
	*Resource	*Start	*Finish	Actuals	ETC	Total Usage	Jan 2020	Feb 2020	Mar 2020	Apr 2020
							ETC	ETC	ETC	ETC
Complete Project Plan	Business Anal...	Jan 01 2020	May 12 2020	0	5		10	10	0	
Complete Project Plan	Architect	Jan 22 2020	Jan 28 2020	0	1		0	0	0	
Complete Project Plan	Project Manag...	Jan 22 2020	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.

Modern UX: My Tasks View

- New *My Tasks* view available on home page
- Displays tasks to which the logged in user is assigned across projects
- Can click to edit task, or mark task complete
- Highlighting indicates overdue tasks
- Click the *Projects* link in the upper right to navigate back to the Project Tile view



Filter...							PROJECTS
	Project	Task	Team Member	Start	Finish ↑	Status	
🔍	Google Mail Transition	Develop	Hannah Avery, Reed Campbell, Develop...	Sep 13 2017	Nov 09 2017	<input type="checkbox"/>	
🔍	Google Mail Transition	Coding	Hannah Avery, Reed Campbell, Develop...	Sep 14 2017	Nov 10 2017	<input type="checkbox"/>	
🔍	Google Mail Transition	Test	Hannah Avery, Reed Campbell, Sara Garv...	Sep 19 2017	Nov 10 2017	<input type="checkbox"/>	
🔍	Google Mail Transition	Package FP or Release	Hannah Avery, Reed Campbell, Develop...	Sep 20 2017	Nov 10 2017	<input type="checkbox"/>	
💡	Genius Upgrade	Define Scope Change and Control Process	Mindy Calderon, Sara Garvey	Oct 24 2017	Dec 04 2017	<input type="checkbox"/>	
🔍	Genius Upgrade	Complete Project Plan	Hannah Avery, Mindy Calderon, Sara Gar...	Oct 04 2017	Feb 23 2018	<input type="checkbox"/>	
🔍	2017-2018 Server Maintenance	Server Maintenance	Hannah Avery, Jessica Bonham, Reed Ca...	Oct 02 2017	Feb 23 2018	<input type="checkbox"/>	
💡	Google Mail Transition	Test Task	Jan Fair, Sara Garvey	Feb 16 2018	Feb 26 2018	<input type="checkbox"/>	
🔍	Genius Upgrade	Unit and Performance Testing	Hannah Avery, Mindy Calderon, Reed Ca...	Oct 04 2017	Mar 05 2018	<input type="checkbox"/>	
💡	Google Mail Transition	New Task	Hannah Avery, Sara Garvey	Mar 05 2018	Mar 30 2018	<input type="checkbox"/>	
🔍	Genius Upgrade	New Task	Business Analyst (2), Sara Garvey, Ross H...	Apr 09 2018	May 30 2018	<input type="checkbox"/>	

Assign Roles and Teams to Project Teams and Tasks

- Teams and Roles may now be assigned to tasks.
- In previous versions, only named resources could be assigned to tasks.

The screenshot displays the CA PPM Genius Upgrade interface. The top navigation bar includes tabs for DETAILS, STAFF, LINKS, STATUS, FINANCIALS, DOCUMENTS, RISKS, ISSUES, CHANGES, and TASKS (highlighted with a red box). The TASKS tab shows a list of tasks under the Planning Phase, with a search bar and a 'NEW TASK' button. A red box highlights the 'ADD STAFF' dropdown menu, which lists resources (Sara Garvey, Navdeep Joshi), roles (Business Analyst, Developer, Project Manager), and teams (Fierce Troop, Java Developers).

Phase	Task	Assigned Resources	Due Date
Initiation Phase	Initiating Process Complete		Mar 19
Planning Phase	Define Scope Change and Control Process	PM	Mar 23
	Define Resource Plan	PM	Apr 06
	Risk Response and Mitigation Plan	BA, JD	Apr 06
	Identify Infrastructure Requirements		Apr 13
	Complete Project Plan	BA, PM	Apr 13
	Planning Phase Gate Complete		Apr 13
Design Phase			

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

Appendix: Resource Management Portlet Examples



Let Rego be your guide.

OOTB Views to Use!

- Review Unfilled Allocations for your team/department.

ca PPM

Home Administration Favorites

Capacity Planning Overview

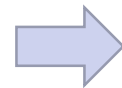
			Allocation			
OBS			Apr 18	May 18	Jun 18	Jul 18
All Groups		Hard-booked Staff	19.42	13.80	11.67	12.84
		Soft-booked Staff	197.09	189.84	178.30	163.29
		Unfilled Roles	362.99	347.80	334.77	331.41
		Capacity - Allocation	(330.50)	(302.24)	(275.74)	(258.55)
		Actuals				
Agile Teams		Capacity	8.00	8.00	8.00	8.00
		Allocation	1.19	1.70	1.70	1.62
		Hard-booked Staff	0.10	0.10	0.10	0.07
		Soft-booked Staff	1.09	1.60	1.60	1.55
		Unfilled Roles				
Business Transformation		Capacity	54.00	54.00	54.00	54.00
		Allocation	21.95	21.95	21.95	19.90
		Hard-booked Staff				
		Soft-booked Staff	21.95	21.95	21.95	19.90
		Unfilled Roles	32.05	32.05	32.05	34.10
		Capacity	13.00	13.00	13.00	13.00
		Allocation	17.52	17.09	16.26	15.31
		Hard-booked Staff				

OOTB Views to Use!

- Project Level Allocations to ensure accuracy:

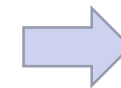
OBS▲			Apr 18	May 18	Jun 18
Agile Teams	Allocation		0.10	0.10	0.10
	Hard-booked Staff		1.09	1.60	1.60
	Soft-booked Staff				
	Unfilled Roles				
Business Transformation	Capacity - Allocation		6.81	6.30	6.30
	Actuals				
	Capacity		54.00	54.00	54.00
	Allocation		21.95	21.95	21.95
	Hard-booked Staff				
	Soft-booked Staff				
	Unfilled Roles		21.95	21.95	21.95
	Capacity - Allocation		32.05	32.05	32.05
	Actuals				

Total Department



Resource▲	Primary Role	Oct 17	Nov 17	Dec 17
Brooks, Emma	Project Manager BT			
Bush, Frederic	Team Lead			
Core, Elizabeth	Project Manager BT			
Delgado, Mauricio	Project Manager BT			
Eberly, Hannah	Project Manager BT			
Engle, Carla	Team Lead	1.64	1.00	
East, Isaac	Project Manager BT			

Total by Resource



Investment▲	Investment Role	Booking Status	Allocation	ETC	Oct 17	Nov 17	Dec 17
A Finance Process Change	Team Lead	Soft	1,344.00	536.00	176.00	176.00	168.00
Introduce Self Service Portal	Team Lead	Soft	536.00	0.00	112.00		
			1,880.00	536.00			

Allocations by Project

Task Assignments!

- All Task Assignments and Status in one Portlet:

Project	Task	Resource/Role	Priority	Status	Schedule %	Days Late	ETC	Pending Actuals	Actuals	Gantt Schedule					
										Jul 17	Aug 17	Sep 17	Oct 17	Nov 17	D
A Finance Process Change	Develop high level process map	Thomas, Brian	✖	Completed	100%	0	0.00	0.00	0.00						
A Finance Process Change	Identify team and resources	Thomas, Brian	✖	Completed	100%	0	0.00	0.00	0.00						
A Finance Process Change	Modify project plan and milestones	Thomas, Brian	✖	Completed	100%	0	0.00	0.00	0.00						
A Finance Process Change	Define defect/opportunity metrics	Grimes, Joyce	✖	Started	✖	200	0.00	0.00	0.00						
A Finance Process Change	Define defect/opportunity metrics	Engle, Carla	✖	Started	✖	200	48.00	0.00	0.00						
A Finance Process Change	Collect data for relevant metrics	SME	✖	Started	✖	186	80.00	0.00	0.00						
A Finance Process Change	Collect data for relevant metrics	Grimes, Joyce	✖	Started	✖	186	10.00	0.00	0.00						
A Finance Process Change	Collect data for relevant metrics	Shetler, Jacob	✖	Started	✖	186	10.00	0.00	0.00						

*Team Member Task Summary is a great portlet to share with team members that may not have Clarity licenses.

The New UI has a great RM view!

- Total Resource and Project Details in one click:

Resources Investments			Search or filter...	
			2018-04	2018-05
			FTE	FTE
×	PINNED (3)	ALL	225.11	211.99
>	Aaron Bennett	●	1.00	1.00
✓	Adam Benning	● ⊕	1.32	1.32
	Contrast Media	×	0.18	0.18
	Critical Care Ventilation	×	0	0
	Defibrillator Improveme...	×	1.00	1.00
	Home based Cardiac Defi...	×	0.05	0.05
	Magnetic Resonance Ima...	×	0	0
	Nuclear Cardiology 5000	×	0.06	0.06
	Ultrasound 5000	×	0.03	0.03
>	Adam Gray	●	1.00	1.00

RegoXchange Portlets to Make Life Easier

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

Data Issues - Resources

Resource Resource OBS

Resource Name

Days

Power Filter [\[Build Power Filter\]](#)

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

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

◀ Page 1 of 5 ▶▶

■ = Required



Displaying 1 - 20 of 96



RegoXchange Portlets to Make Life Easier

- RM Governance portlet

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

RM Governance

Resource OBS  

Resource Manager  

OBS Mode Unit and descendants

Filter Show All Save Filter Clear

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

RegoXchange Portlets to Make Life Easier

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

