

Increasing Data Compliance

Your Guides: Ross Hensel and Clayton Reynolds

Introductions

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



Agenda

- Compliance/Quality Definition & Value
- Common Compliance/Quality Issues
- Increasing Compliance/Quality

What is Data Compliance/Quality?

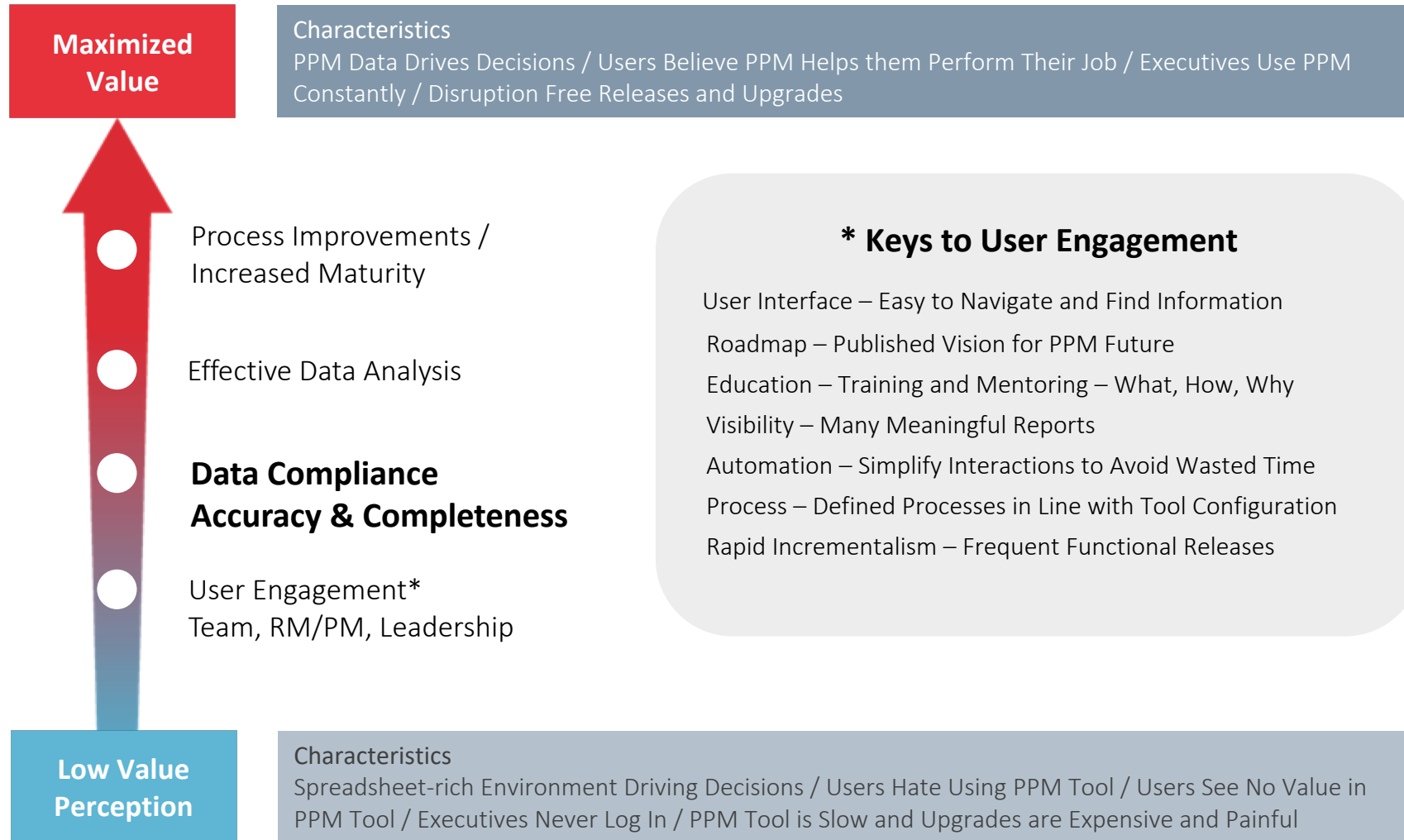
- Data Compliance = Is the data filled in appropriately
 - Timesheet submitted on time
 - Status report filled out
 - People have team allocations
- Data Quality = Is the data filled in accurate
 - Does that timesheet reflect what happened
 - Is the status correct
 - Are allocations correct
- The system can give us compliance metrics, but quality relies more on individuals to monitor

Open Mic

- Why Do We Want to Increase Data Compliance/Quality?

Quality/Compliance is Critical to Maximize Value

6



- What are your top compliance/quality problems?

Survey Says - Top Compliance/Quality Issues

1. Team Allocation Data
2. Current Task Dates
3. Project Stage & Health (RYG)
4. Time Submitted/Approved on Time
5. ETC
6. Current Financial Forecast
7. Risk/Issue/Change Data
8. Resource Calendar Time Off
9. Project Closure

Why is Data Compliance/Quality so Hard?

- People get busy and forget
- No understanding of why the data is important or how it is used
- They do not use the data, so there is no value for them
- Your ideas?




Open Mic





- What Have You Done to Increase Data Compliance/Quality?


Rego Suggestions on Increasing Compliance/Quality

- Stalkers / Notifications
 - Allocation Reminder to Resource & RM
 - PM Reminder of Stale Data
 - Timesheet Reminder to Resource & RM
 - Action Item Responder
- Data Compliance Metrics
 - Completeness Metrics for Org
 - Naughty and Nice List
- Use the Data
 - Leadership needs to use the data in reports, presentations, live meetings

Notification: Project Compliance Stalker - PM

Clarity - Project Compliance  Inbox x  

 **clarity@ca.com** <clarity@ca.com> 1:53 PM (1 minute ago)   

to chris 

Project Manager: Wuenstel, Chris

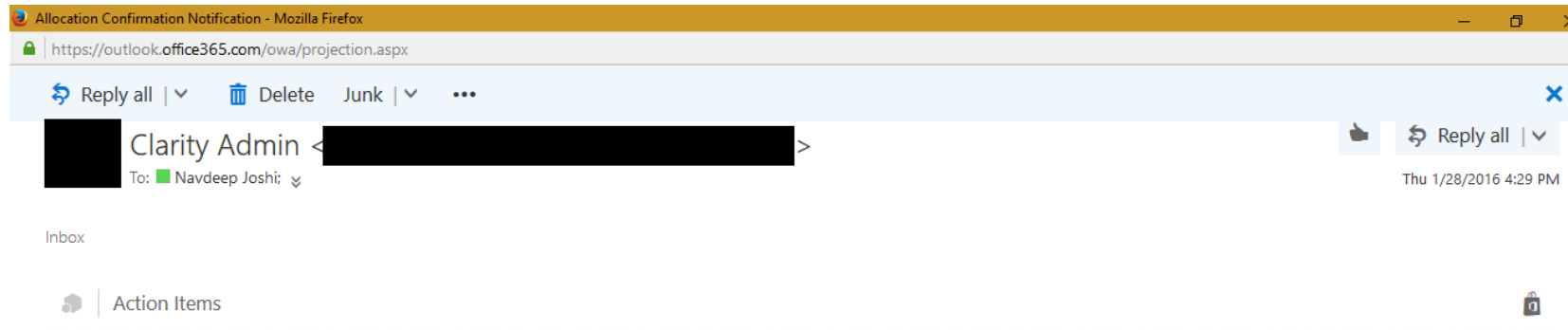
You are receiving this email because at least one project currently assigned to you has data that is out of compliance. Please review the list below and address all compliance issues ASAP.

These projects have data compliance issues:

Project ID	Project Name	Stale Task Count	Late Issue Count	Late Risk Count	Late Status Report	Total Count
PR9232	Deploy Windows 7	18			No Status Reports created	19
PRJ03	Create Webcam Conference	3	1	2	No Status Reports created	7

This is an automated message. Please do not reply.

Notification: Allocation Confirmation Notification



Hi Navdeep

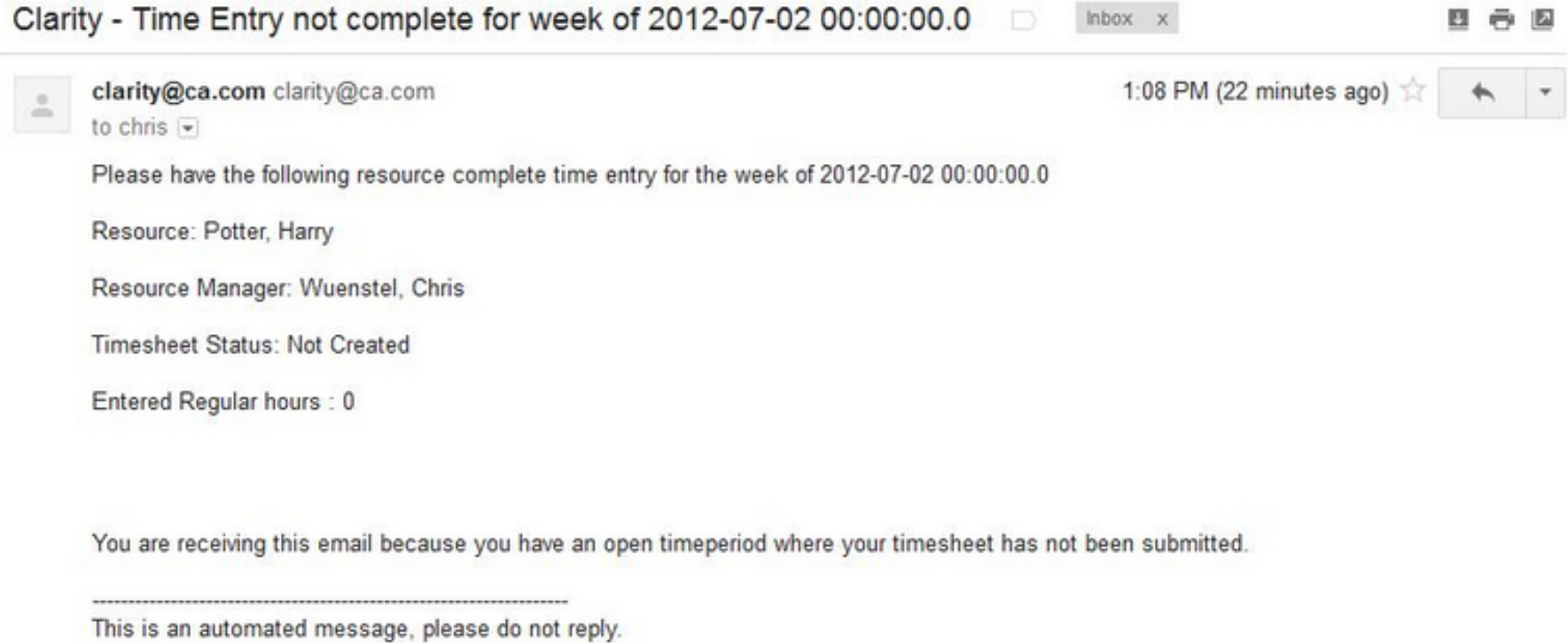
Below are your weekly allocation hours for the next 6 weeks, please verify and update as appropriate. [Click here](#) for Resource Allocation page.

Project ID	Project Name	01 Feb 2016	08 Feb 2016	15 Feb 2016	22 Feb 2016	29 Feb 2016	07 Mar 2016
PR2480	RegoXchange Development	0.40	0.40	0.40	0.40	0.40	0.40
PR2493	Solution Oversight - Knowledge Management	14.80	14.80	14.80	14.40	14.40	14.40
PR2494	Admin - Internal Environments	1.40	1.40	1.40	1.40	1.40	1.40
PR2486	Admin - Internal Training				9.78	9.78	9.78
PR2492	Solution Oversight - Support	1.40	1.40	1.40	1.40	1.40	1.40
PR2641	Go To Market Solution - Communities	10.00	10.00	10.00	10.00	10.00	10.00
PR1664	Solution Oversight - Innovation	12.00	12.00	12.00	12.00	12.00	12.00
	Total	40.00	40.00	40.00	49.38	49.38	49.38

Thanks.

Note: This is a system generated notification, please do not reply to this email.

Notification: Time Stalker



Rego Action Item Responder

Example Idea Submission

Dear Leo Dsouza,

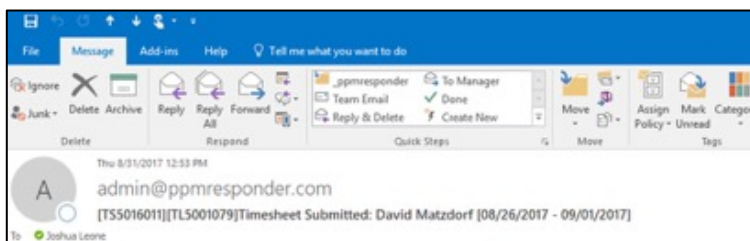
The **Idea** below has been submitted for your approval.
You may mark this Idea **Approved**, **Rejected** or **Incomplete** with the buttons below.
A new email will be generated where you can add notes. Click send on that email to submit.

Idea Name	Requestor	Type	Priority	Goal	Planned Cost	Planned Benefit	Department
Build a bunker	Josh Leone	Survival	3	Survive bad stuff	\$30,000	\$10,000	Infrastructure
Description							
In order to survive the pending nuclear disaster, we need build a bunker to store all the important stuff.							
Objective							
If we keep the important stuff safe it will allow us to survive longer.							

If you have questions or comments regarding this notification, please contact CA PPM Support.

Thank you!
CA PPM Admin

Example Timesheet Submission

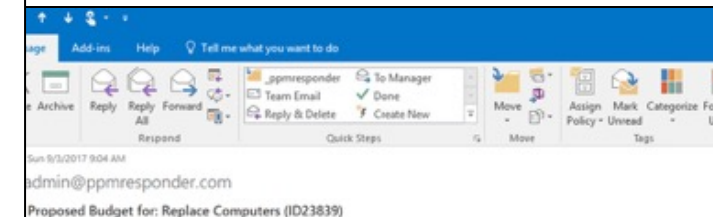


Dear Josh Leone,

Here is the timesheet for **David Matzdorf** for the time period of **08/26/2017 - 09/01/2017**

Investment	Task	Sat 08/26	Sun 08/27	Mon 08/28	Tue 08/29	Wed 08/30	Thu 08/31	Fri 09/01	Total
Acme Development Project	Acme Development Project			3	3	1	5	3	15
Acme Development Project	Core Development			2	4	4	1	1	12
Acme Development Project	UI Development			1	1	3	1	1	7
Acme Development Project	Database Development			5	2	3	1	1	12
Acme Development Project	Testing			2	1	4	2	1	10
Total				13	11	15	10	7	56

Example Budget Submission



Dear Josh Leone,

A cost plan for **Replace Computers (ID23839)** has been submitted as a proposed budget. Below are the details:

Project Manager: Josh Leone

Description: Replace all the computers in the IT department.

Overview: The replacement plan includes all hardware and labor costs.

Cost Type	Transaction Class	2018	2019	2020	2021	Total
Capital	Hardware	\$250,000				\$250,000
Capital	Software	\$500,000				\$500,000
Capital	Internal Labor	\$100,000	\$500,000	\$500,000		\$1,100,000
Capital	External Labor	\$50,000	\$300,000	\$300,000		\$650,000
Operating	Travel Costs	\$20,000	\$20,000	\$20,000		\$60,000
Operating	External Labor		\$50,000	\$50,000	\$50,000	\$150,000
Operating	Internal Labor	50,000	\$50,000	\$200,000	\$200,000	\$500,000
Total		\$970,000	\$920,000	\$1,070,000	\$250,000	\$3,210,000

Timesheet Compliance

<div> Timesheet Submission Compliance by RM Timesheet Submission Compliance by OBS Timesheet Approval Compliance by RM Timesheet Approval Compliance by OBS </div>				
Timesheet Compliance: Timesheet Submission Compliance by RM				
Timesheet Submission Compliance by RM				
Resource Manager	Timesheets Not Compliant (as of Monday 12PM EST)	Total Timesheets Required (as of Monday 12PM EST)	Current Week Compliance Percentage (as of Monday 12PM EST)	Jun 08
Abbiati, Stefano	2	2	0	100
Adams, John	0	13	100	100
Akella, Prasad	0	7	100	71
Alcayna, Salvador	0	11	100	82
Alfaro, Eric	2	7	71	71
Anderson, Paul	3	10	70	60
Aniruddha Mascaren, Naveen	1	1	0	0
Appelgren, Christophe	0	3	100	100
Armstrong, Don	8	8	0	0
Assam, Youcef	0	8	100	100
Augier, Isabelle	4	9	56	89
Ayewa, David	1	7	86	86
Badowski, Jeff	0	2	100	100
Ballekens, Joeri	0	9	100	89
Bantle, Mirko	0	5	100	100

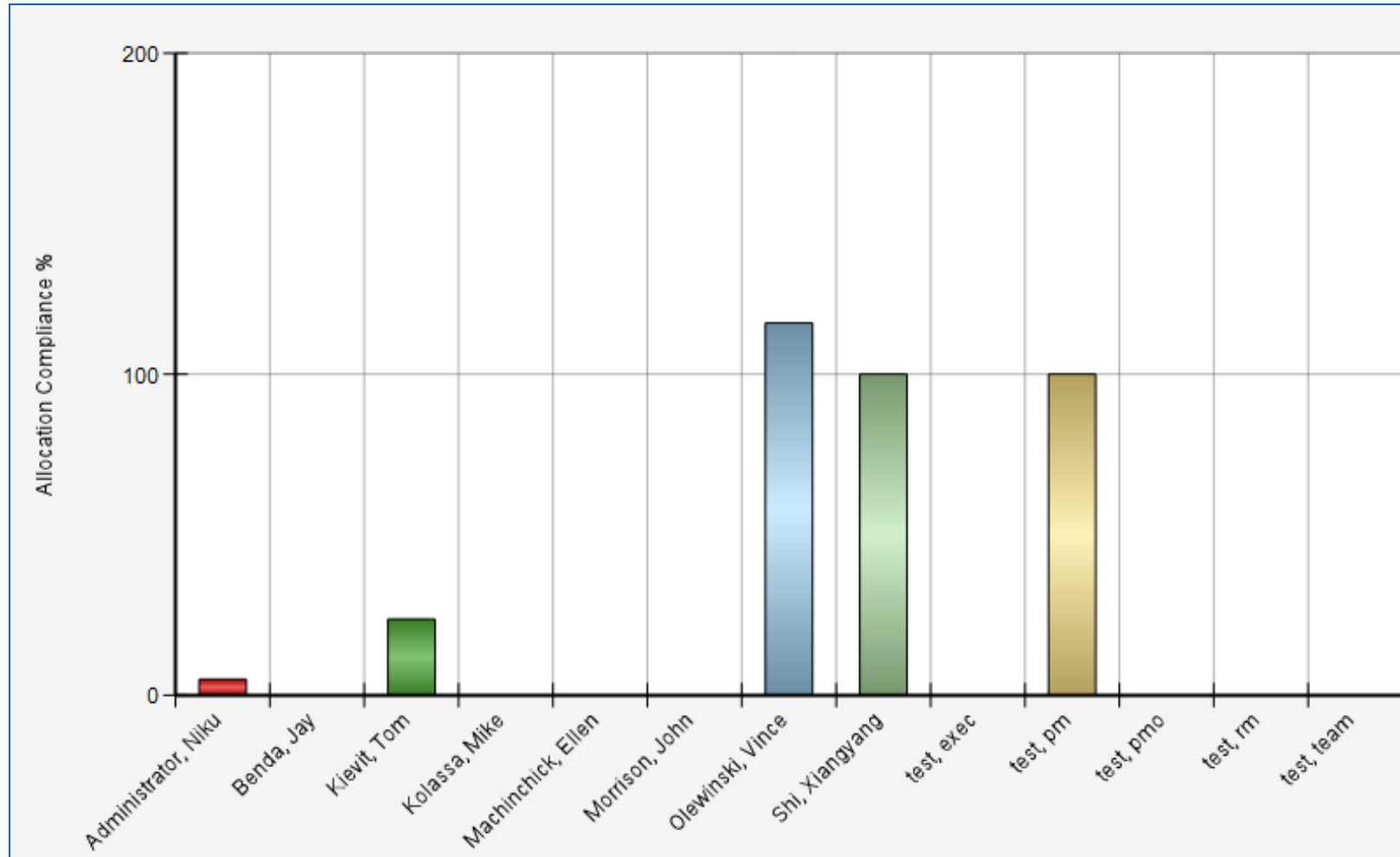
Late/Stale Dashboard

Power Filter [Build Power Filter]																
Filter		Show All		Save Filter		Clear										
ID	Name▲	Overall Status	Schedule Status	Scope Status	Cost/EFT Status	Resource Status	Late Action Items	Late Issues	Late Risks	Late Milestones	Late Tasks	Schedule Var %	Days Over Base	Effort Var %	Hrs Past Base	
PRUS100035	Colleague Conversion Phase II	⚠	⚠	✖	✔	✔	✔ 0	✔ 0	✔ 0	✔ 0	✖ 2	✖ (35)	✖ 82	✖ (3,297)	✖ (363,393)	
PRUS100053	Compensation - Salary & Bonus Administration	✔	✖	✖	✖	⚪	✔ 0	✔ 0	✔ 0	✔ 0	✔ 0	✔	✔ 0	✔	✖ (54,969)	
PRUS100047	ESS and MSS (Employee Self Service) & CM	✔	✔	✔	✔	⚪	✔ 0	✔ 0	✔ 0	✔ 0	✖ 1	✖ (20)	✖ 38	✖ (20,537)	✖ (588,504)	
PRUS100228	PeopleNet Implementation - Phase I	✔	✔	✔	✔	✔	✔ 0	✔ 0	✔ 0	✖ 5	✖ 14	✖ (165)	✖ 301	✖ (60)	✖ (3,415)	
PRUS100513	PeopleNet Implementation Phase II	✖	⚪	⚪	⚪	⚪	✔ 0	✖ 2	✖ 3	✖ 26	✖ 62	✖ (127)	✖ 302	✖ (22)	✖ (776)	
PRUS100371	Specialty PeopleSoft rollout - High Level Planning	✔	⚪	⚪	⚪	⚪	✔ 0	✔ 0	✔ 0	✔ 0	✔ 0	✖ (45)	✖ 24	✔ 43	✔ 0	
PRUS100039	2011 NA PSFT Modernization	✔	⚪	⚪	⚪	⚪	✖ 2	✔ 0	✔ 0	✔ 0	✔ 0	✖ (3)	✖ 12	✖ (132)	✖ (68,846)	

Missing Time – My, PM, RM, and by OBS

Your Your Staff Your Projects By OBS							
Missing Time by OBS v2 [--Actions--]							
Filter System Default [Collapse Filter]							
OBS Organization:IT Division							
Filter	Show All	Save Filter	Clear				
Stoplight	Status	Period Start	Resource	Type	Manager	Actual Hours	
⏏ 1 2 3 4 ⏏							
⛔	Not Created	7/5/09	Hill, Robbin (ITD)	Contractor	Dickson, Don (ITD)		0
⛔	Not Created	7/5/09	Greer, Dan (ITD)	Contractor	Dickson, Don (ITD)		0
⛔	Unsubmitted	7/5/09	Dickson, Don (ITD)	Full Time	Publicover, Rick (ITD)		0
⚠	Submitted	7/5/09	Gagnon, Al (ITD)	Full Time	Penney, Glenn (ITD)		37.5
⛔	Not Created	7/5/09	Munro, Alan (ITD)	Full Time	MacAskill, Doug (ITD)		0
⛔	Unsubmitted	7/5/09	Buchanan, Andrew (ITD)	Full Time	Loughery, Kristen (ITD)		0
⛔	Unsubmitted	7/5/09	Lanteigne, Andrew (ITD)	Full Time	Prime, Todd (ITD)		27.5
⛔	Not Created	7/5/09	Nichol, Anne (ITD)	Full Time	Friars, Gary (ITD)		0
⛔	Unsubmitted	7/5/09	Kilaparti, BalaKrishna (ITD)	Contractor	Davis, Lorraine (ITD)		24
⛔	Not Created	7/5/09	McHarg, Ben (ITD)	Full Time	MacKellar, Steve J (ITD)		0
⛔	Unsubmitted	7/5/09	Taylor, Bonnie (ITD)	Full Time	Munro, Alan (ITD)		0
⛔	Unsubmitted	7/5/09	Richards, Bruce (ITD)	Full Time	Blacquier, Joe (ITD)		103.11
⛔	Unsubmitted	7/5/09	Keenan, Carrie (ITD)	Full Time	Nichol, Anne (ITD)		0
⛔	Unsubmitted	7/5/09	Cook, Charlie (ITD)	Full Time	Sheehan, Tony (ITD)		0
⛔	Unsubmitted	7/5/09	Gallant, Christian (ITD)	Full Time	McGillivray, Todd (ITD)		19.5
⛔	Not Created	7/5/09	Sanderson, Dana (ITD)	Full Time	MacAskill, Doug (ITD)		0
⛔	Not Created	7/5/09	Michaud, Danny (ITD)	Contractor	McGillivray, Todd (ITD)		0
⛔	Not Created	7/5/09	MacAskill, Doug (ITD)	Full Time	Administrator, Niku (ITD)		0
⛔	Unsubmitted	7/5/09	Friars, Gary (ITD)	Contractor	Wood, Sherry (ITD)		0
⛔	Unsubmitted	7/5/09	Guo, George (ITD)	Full Time	Anderson, Harold (ITD)		30.65
⏏ 1 2 3 4 ⏏							
Total Results: 74							

My Resources – Allocation Compliance



Resource Management Governance

RM Governance

Resource OBS

Resource Manager

OBS Mode

[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	■

Project Adoption Metrics

The following slides describes in more detail the individual metrics used to provide data from within the Project Object. The metrics include:

- Project Status Reporting
- Project Risk Adoption
- Project Issue Adoption
- Project Schedule
- Project Baseline
- Project Zero ETC's
- Project Past ETC's
- Project Milestone/Key Tasks
- Project Schedule Variance
- Project Effort Variance
- Project Budget Variance
- Project Unfilled Roles
- Project Data Quality
- Project Commitment

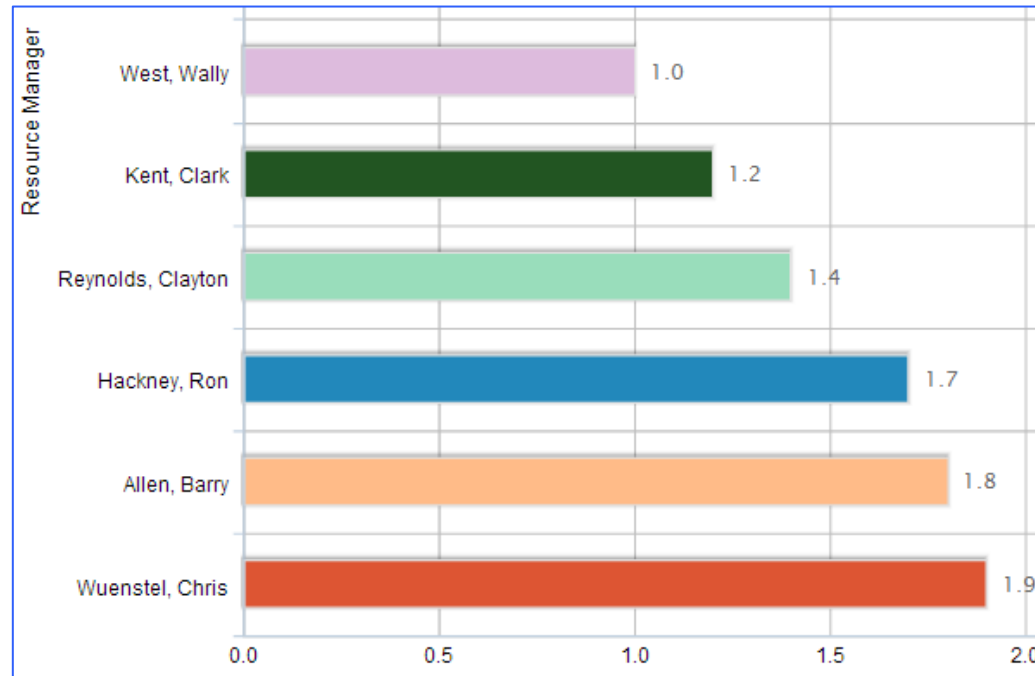
Resource Adoption Metrics

The following slides describes in more detail the individual metrics used to provide data from within the Resource Object. The metrics include:

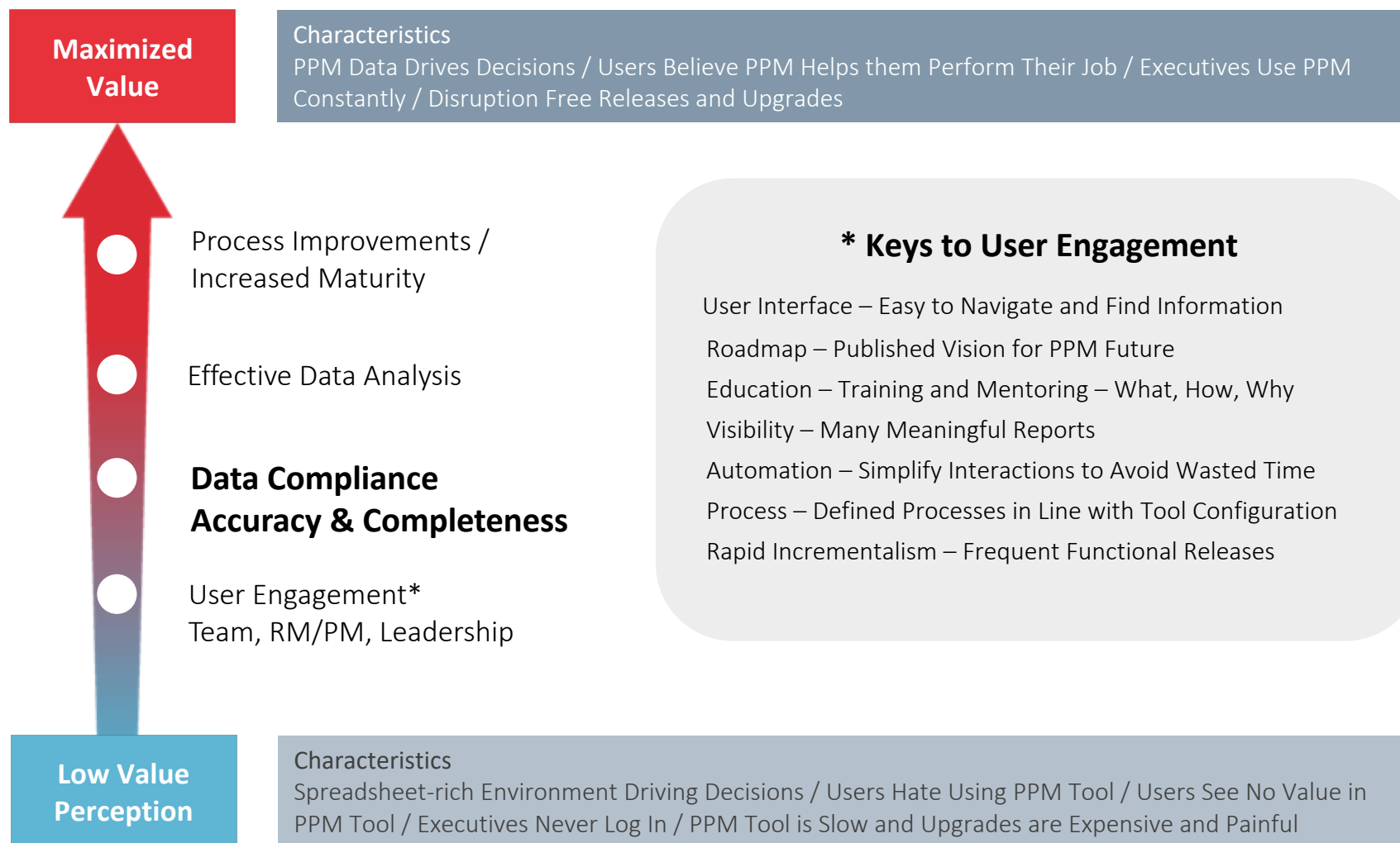
- Resource Clarity Usage
- Resource Timesheet
- Resource Allocation
- Resource Actual Utilization
- Resource Allocation Date in the Past
- Resource Data Quality
- Resource Commitment

RM or PM Lowest / Highest Adopters

Purpose/Description – provides a view into which managers have the highest or lowest adoption scores by looking at an average overall score for all Resource/Project metrics or by an individual metric.



Summary: Data Compliance is Critical



Questions?



*rego*University 2018

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

Adoption Metrics

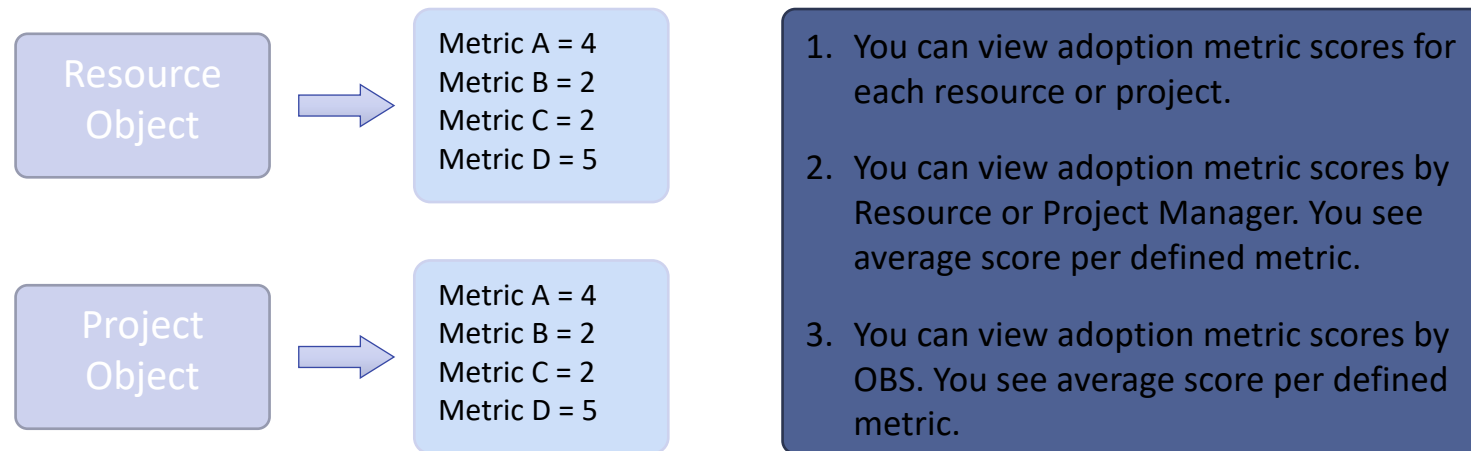
*rego*University 2018

Rego Adoption Metrics

- Provides a way to measure how well Clarity is being utilized based on a pre-defined set of Project and Resource attributes. Thus acquiring insight into how effective Clarity is being utilized and driving more effective project and resource management practices.
- Introduce a set of metrics defined for projects, and resources.
- Establish a base scoring model for each metric based on levels 0 to 5. Based on the maturity of an organization the metric scoring models can be revised.
- Project Metrics apply only to active projects (approved and started). Excludes maintenance or time tracking only types.
- Resource Metrics only apply to active users (excludes locked resources)

Adoption Metrics Framework

The Adoption metrics framework provides a way to measure how the system is being used based on a set of pre-defined project and resource attributes.

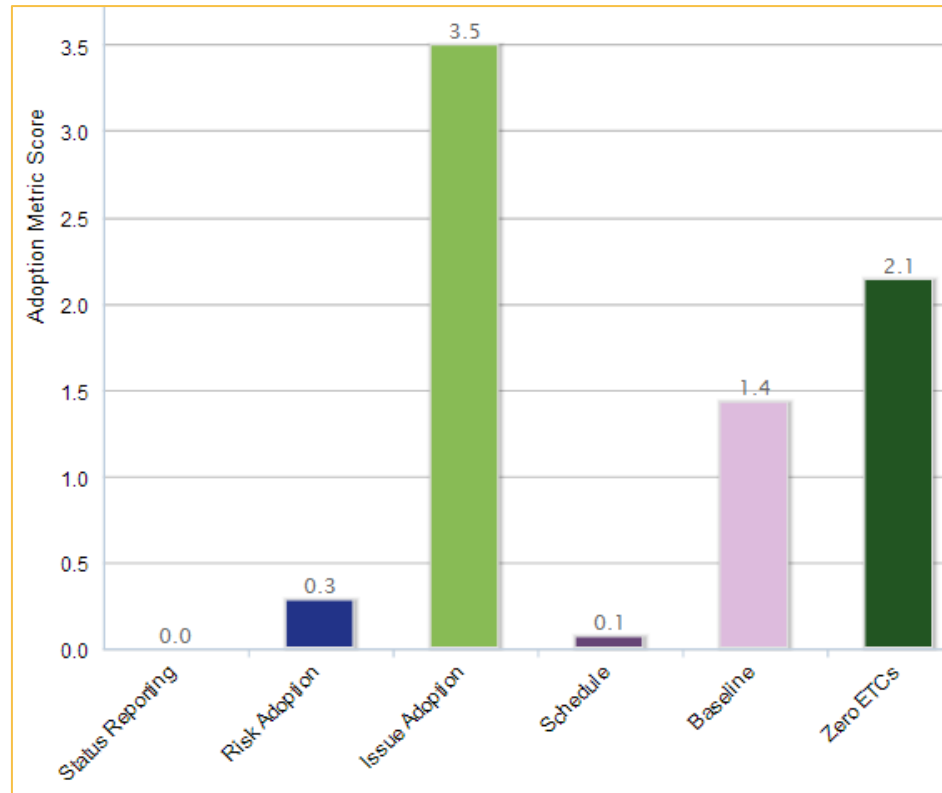


Adoption Metric Framework Levels

- The Adoption Metrics Framework is based on criteria built using a set of scoring levels that will drive maturity.
- Scoring Levels range from 0 to 5
 - 5 – data is of high quality, latest information available
 - 4 – repeatable consistent use with improved data
 - 3 – regular use with consistent data
 - 2 – regular use but inconsistent data
 - 1 – ad hoc or inconsistent use
 - 0 – minimal or no compliance
- To implement the adoption metrics, custom attributes are created on either the project object or the resource object and each metric holds a score that is calculated based on thresholds.

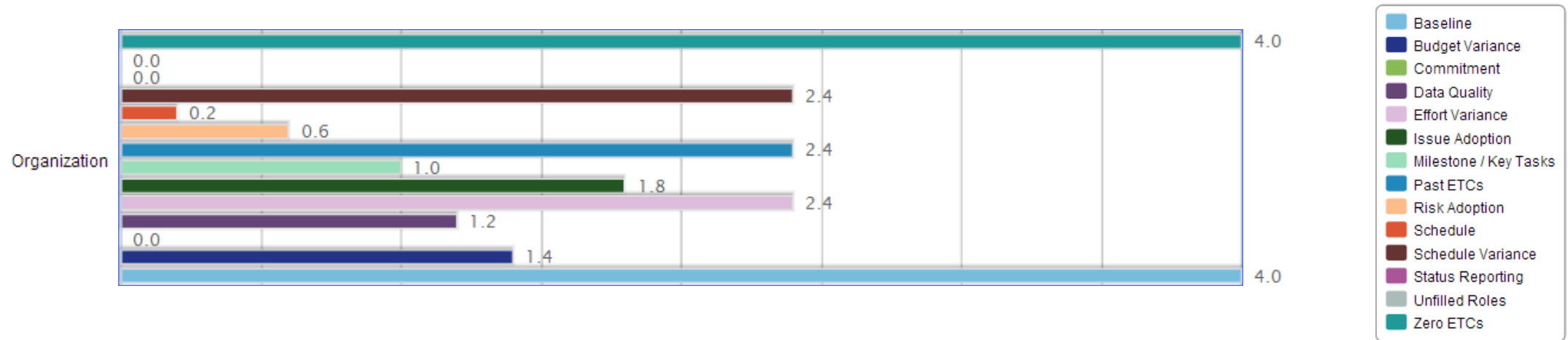
Project Metrics – Portlet

This portlet displays all the project metrics in a column graph view based on the level of the Organization Breakdown Structure chosen.



Project Metrics by OBS

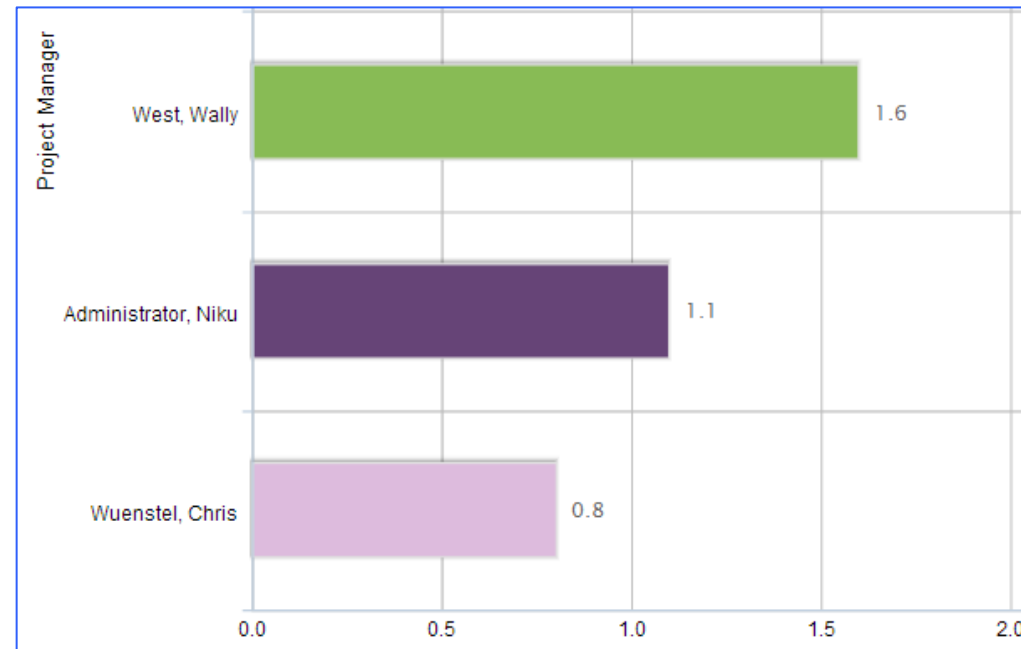
This portlet displays all the metrics or a specific metrics in row graphical format based on filtering by the Organizational Breakdown Structure level and/or to a specific metric.



Project Lowest / Highest Adopters

Purpose/Description – provides a view into which resource managers have the highest or lowest adoption scores by looking at an average overall score for all Resource metrics or by an individual metric.

- Selection Criteria –
 - Active projects only (active/approved/started)
 - Excludes programs and templates
 - Roles are not included in the analysis
- Calculations –
 - 0 – Null values are not calculated into the averages
- Formula: $A = \frac{\text{Sum of all Individual Project Manager metric Values}}{\text{the Number of Project Manager metric values}}$
- Variations – None



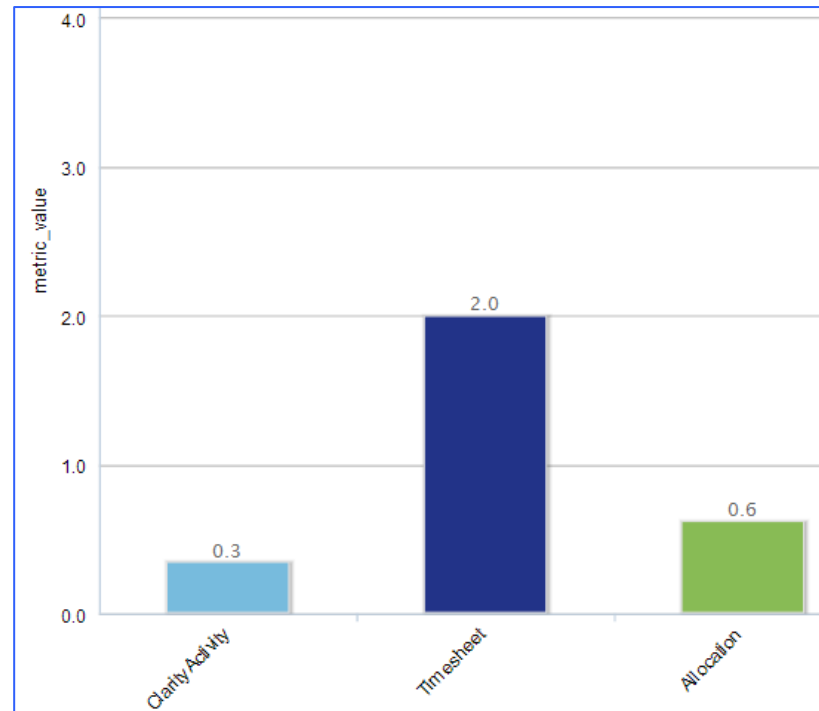
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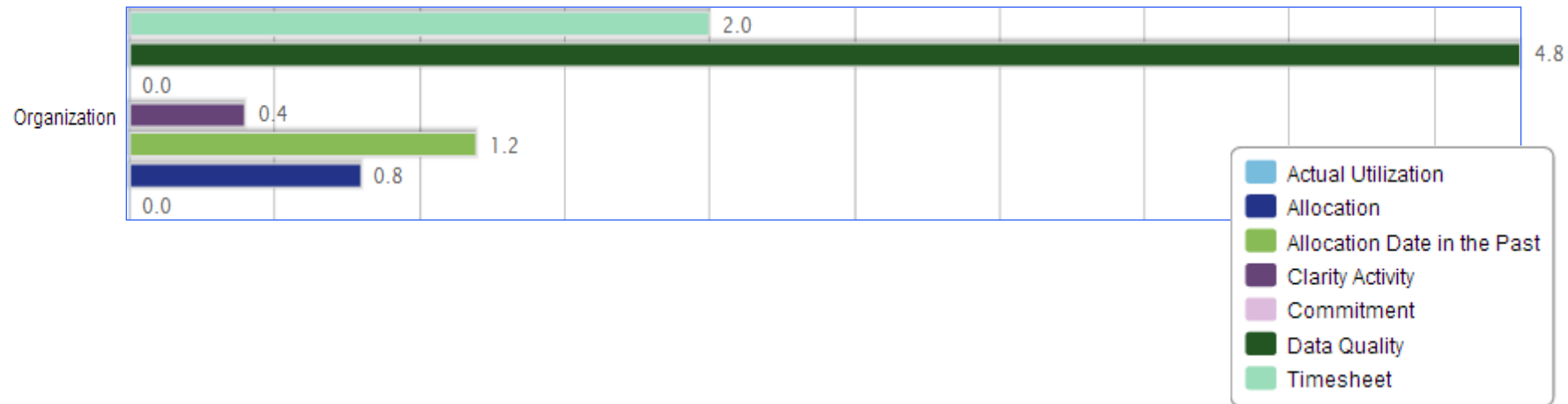
Resource Metrics – Portlet

This portlet displays all the resource metrics in a column graph based on the Organization Breakdown structure level chosen.



Resource Metrics by OBS

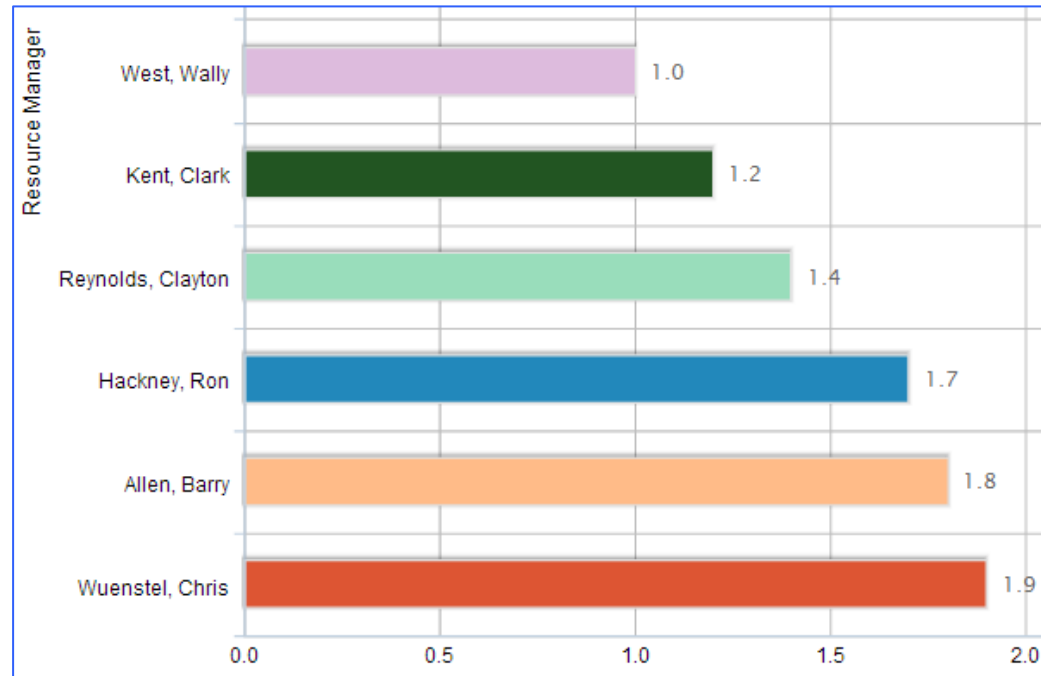
This portlet displays all or a specific resource metrics in row graphical format filtered on Organizational Breakdown Structure and specific metric.



Resource Lowest / Highest Adopters

Purpose/Description – provides a view into which resource managers have the highest or lowest adoption scores by looking at an average overall score for all Resource metrics or by an individual metric.

- Selection Criteria –
 - Resource is Active
 - Resource is Open for time entry
- Calculations –
 - 0 – Null values are not calculated into the averages
- Formula: $A = \frac{\text{Sum of all Individual Resource metric Values}}{\text{the Number of Resource metric values}}$
- Variations – None



Resource Adoption Metrics

The following slides describes in more detail the individual metrics used to provide data from within the Resource Object. The metrics include:

- Resource Clarity Usage
- Resource Timesheet
- Resource Allocation
- Resource Actual Utilization
- Resource Allocation Date in the Past
- Resource Data Quality
- Resource Commitment

Adoption Metric Trending – Views

Project or Resource Trending view – pulls monthly trending snapshots for the full complement of metrics displayed in line graph form. This view can be filtered by OBS or by a date range.

