

# OWB | Ongoing Use Tips & Tricks

Your Guides: Jenn Rinella and Rob Ensinger



# Introduction

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Let Rego be your guide.

# Introductions

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



# Agenda

- Introduction
  - Open Workbench Integration with CA PPM
- Staffing via CA PPM
- Opening a Plan
- Preferences
  - Quick Access Toolbar - quick commands & shortcuts
  - Quick Search and Quick Filter - find now items
  - Views and Filters - good to know
- Projects
  - Work Breakdown Structure - the shortcuts
  - Dependencies - the quickies
  - Assignments – quick assignments & transfer assignments
  - Autoschedule - magic button?
  - Baseline - did you know
  - Copy Plans - shortening plan creation time
- Plan Closure – the plan's 'hot' list



# Why Integrate OWB with CA PPM?

- Full bidirectional connection between CA PPM and OWB.
- Stop relying on multiple spreadsheets and applications for data.
- Real-time progress updates on OWB project schedule through CA PPM Timesheets.
- Repeatable processes and centralized data are essential in providing accurate reports and actionable metrics.
- Uses the same algorithms as CA PPM for seamless scheduling.

# Staffing

*via CA PPM*

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Resources should be staffed to the project in CA PPM before the project schedule is opened in OWB

Resource and Calendar Data should be updated and maintained in CA PPM as CA PPM 'owns' Calendar and Resource data. Changes made in OWB will not be copied back to CA PPM.

**Note: This does not apply to Resource Assignment information on Tasks.**

# Staffing: Team Tab/CA PPM

- To list all system primary roles while allocating, use the 'Is Role=Yes' filter option, then multi select from the results.
- Configure the view to list more than the default 20 results (to 40 or 50 to a page), as results can frustratingly list over multiple pages.
- Use 'Add and Select More' to remain on the Select Resource view to continue selecting all of the required roles and/or resources.
- Always adopt the 1 to 1 (role to named resource) mapping rule:
  - Do not allocate a single role >100% to represent two or more resources.
  - Add the same role type twice or more if required, then apportion the percentages accordingly to each role.
- Use the 'Add/Update by OBS' option to bulk allocate resources within the same OBS unit. Ideal for departmental overhead/BAU projects.

# Demo Staffing

# Projects

*Open Plan*

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# Opening A Plan

- When to use '**Read-Only**' (*no lock is applied*)
  - When reviewing/analyzing a plan.
  - When saving a plan off-line.
  - Why lock a plan just to view the detail.
- When to use '**Read-Write**' (*locks the project/plan*)
  - When updates are to be made.
  - Allows only one person to update a plan at any one time.
  - Save at regular intervals, no auto-save option.
  - Always close the plan after updates are complete.

# Opening A Plan: *Best Options*

- Managing locks:
  - Closing the plan drops the lock.
  - Only use the CA PPM 'Unlock' option if:
    - An exception has occurred between the CA PPM-OWB connection.
    - You need to unlock a plan quickly for another user to apply changes.

**Note:** Refrains the original user from saving the plan to CA PPM, best to close the opened plan and re-open after the updates.
- Saving an off-line PPM plan copy:
  - Open the plan using 'Read-Only' option.
  - Name the .rmp file appropriate to the 'snapshot' version.
  - The off-line plan is a review copy and should not be saved back to CA PPM.
- Subsequent plans open quicker when File > Close is used against the originally opened plan, not File > Exit.



# Demo Open Plan

# Preference (*Options*)

*Most Applied*

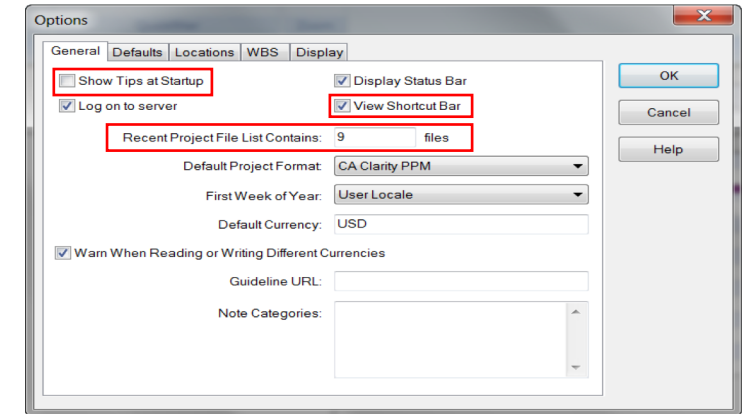
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# Preferences (*Options*): Most Applied

Use Preferences>Options to apply the '*global*' settings to be retained when OWB is opened.

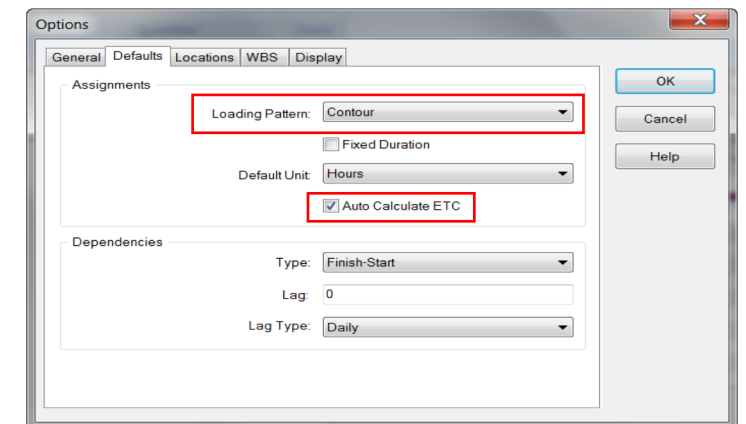
- General Tab

- '**Show Tips at Startup**' can be disabled and enabled.
- '**Recent Project File List Contains**' default is set to four (4) files, can be extended to nine (9).
- '**View Shortcut Bar**' is used to add/remove the views displays to the left. Check the box to add back the views, if they have been removed.



- Defaults Tab

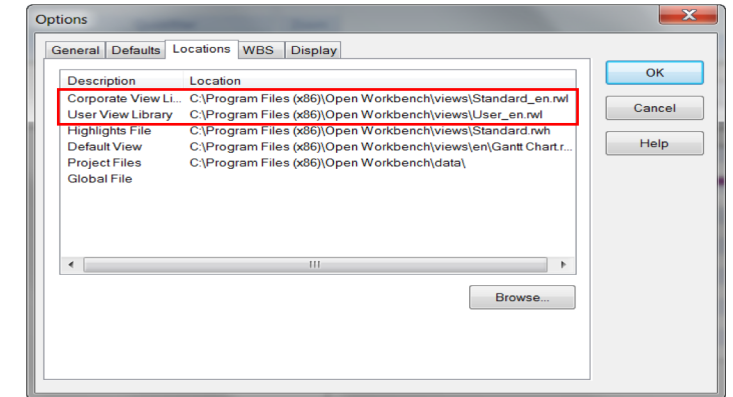
- '**Loading Pattern**' is the spread of hours against assignments, setting the most typically required type here, saves time setting every time an assignment is applied.
- '**Auto Calculate ETC**' adds assignment ETC, based upon the resource's project availability.



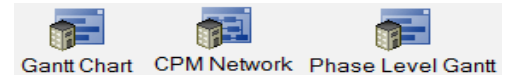
# Preferences (Options): Most Applied

- Locations Tab

- The set of default views can be made 'Corporate', which renders them read-only.
  - This protects the original views from being overwritten when additional views are created.
- Apply the below location mapping to protect:
  - **Corporate View Library** - C:\Program Files (x86)\Open Workbench\Views\Standard\_en.rwl.
  - **User View Library** - C:\Program Files (x86)\Open Workbench\Views\User\_en.rwl.

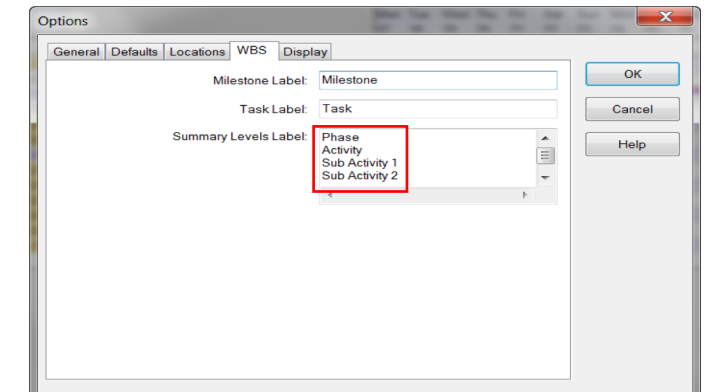


Corporate views display a building graphic against the view icon.



- WBS Tab

- '**Summary Levels Label**' supports the ability to label the available summary level hierarchy.
- As the WBS is built within the plan, the 'Type' field will list the label names defined here.
- When labelling, make sure to insert/add the name while respecting the top-down relationship.



# Demo Preferences

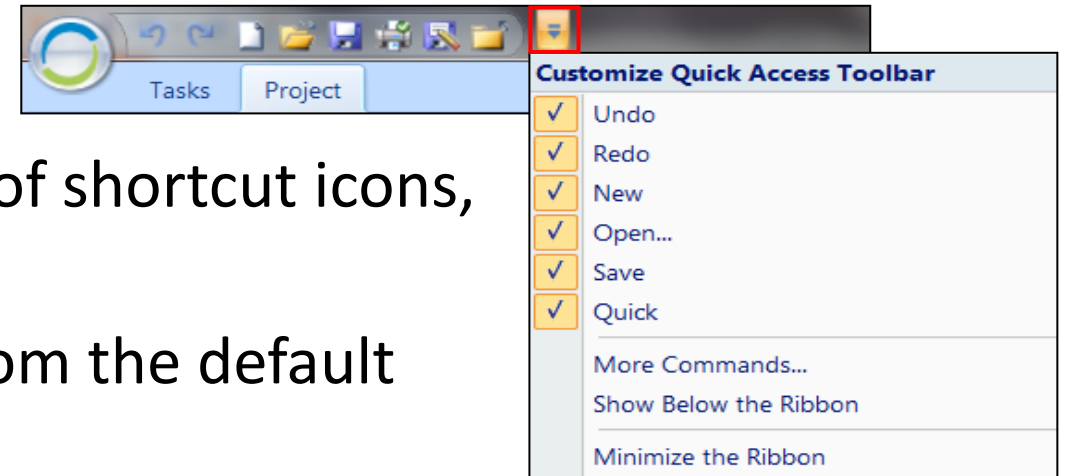
# Quick Access Toolbar

*Quick Commands*

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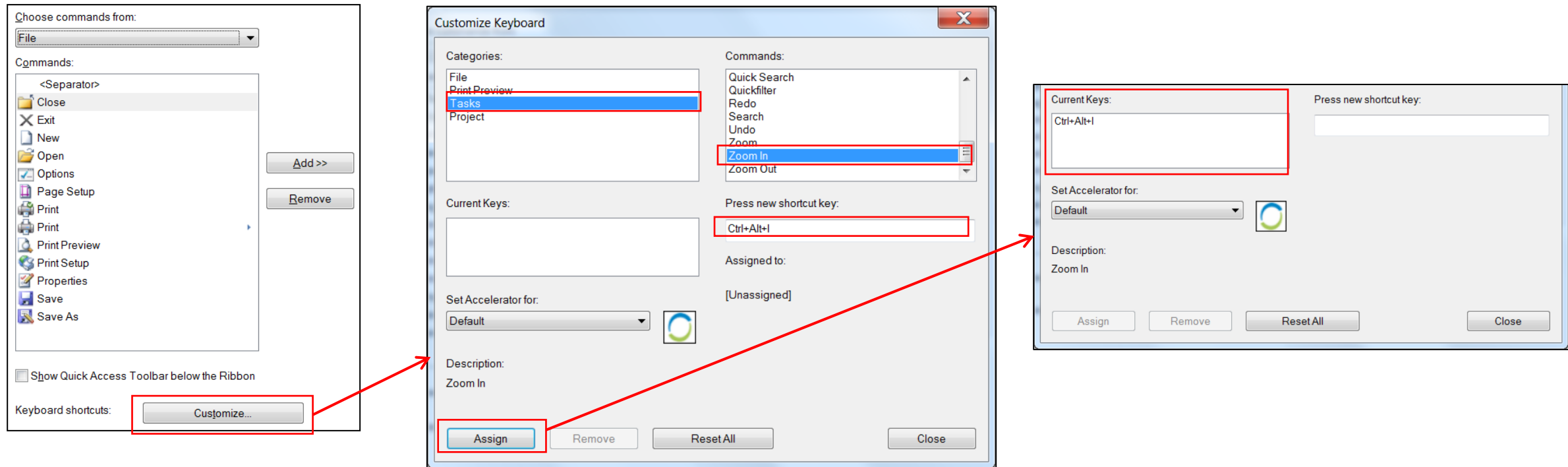
# Quick Access Toolbar: *Quick Commands*

- The '**Quick Access Toolbar**' contains a series of shortcut icons, initially located above the ribbon.
- Commands can be added and/or removed from the default layout.
- The toolbar can be moved to above or below the ribbon.
- When the customize dropdown is selected, options to minimize the ribbon and create custom commands is made available.



# Quick Access Toolbar: *Shortcuts*

- For functions that are used on a regular basis, try assigning a shortcut via the **Keyboard Customise** feature.
- The below example assigns the '**Ctrl+Alt+I**' keystrokes to the '**Zoom In**' command.





# Quick Search And Quick Filter

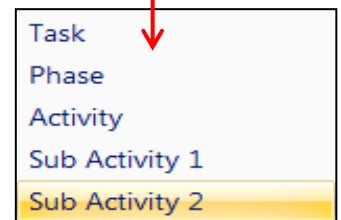
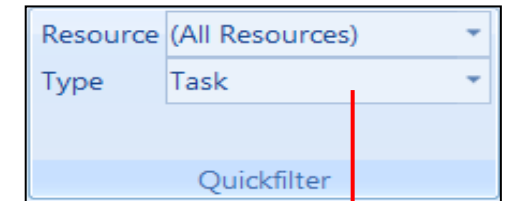
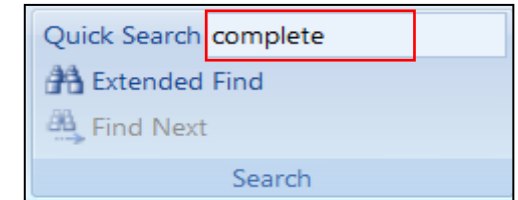
*Find Now Items*

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# Quick Search And Quick Filter: *Find Now Items*

- **‘Quick Search’** is an excellent way to list tasks and/or milestones on the fly:
  - Simply enter either the full or partial related text directly into the search text field.
  - The results instantly start listing in the plan.
- **‘Extended Find’** is similar to a permanent filter, where multiple conditions can be applied for a more detailed search, however these cannot be saved.
- **Quickfilter > ‘Type’** dropdown is used to list any summary level (collapsed) or the complete/lowest level (expanded) plan content.

**Note:** Summary level labels defined within Options > WBS, will list here.



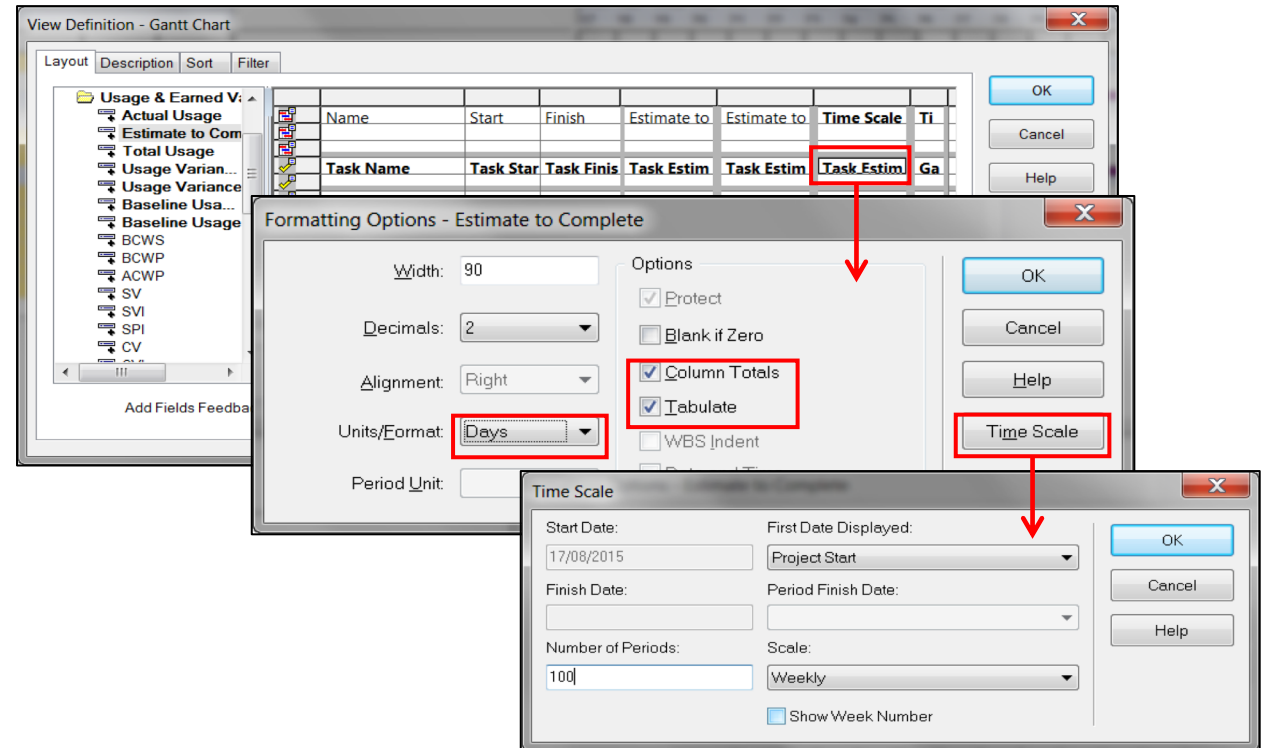
# Views And Filters

*Did You Know?*

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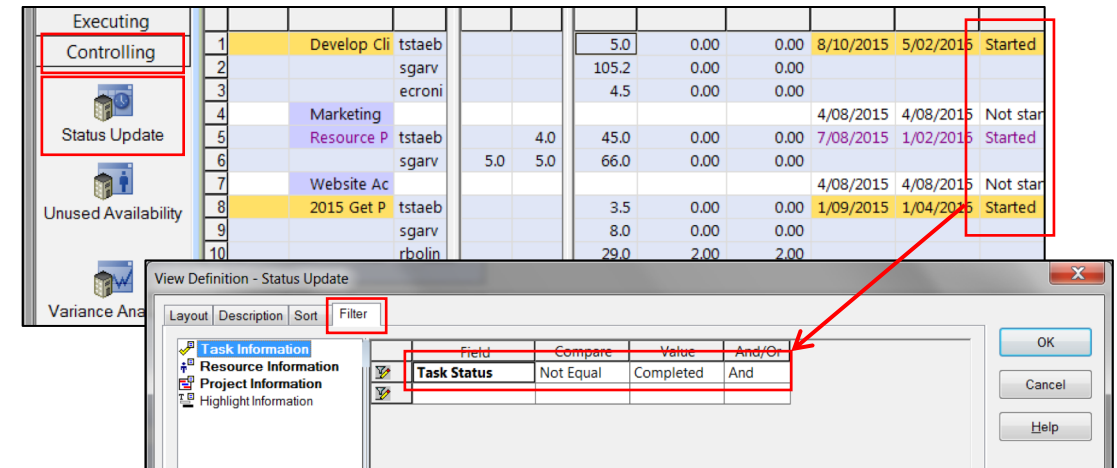
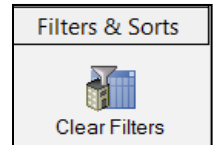
# Views And Filters

- You can use '**F3**' as the shortcut to display the '**View Definition**' dialog box, used to edit views.
- A same value, for example ETCs or Actuals, can be added multiple times to include column totals, formatting and time-scales to display hours and or days of effort.
- Formatting fields enables additional dimensions to just displaying data.
  - For example resource budgeting scenarios can be applied in days, if that works better than in hours.



# Views And Filters

- Filters can be added as part of a view or independently to be applied any time to an existing view.
- Make sure you understand which views contain a filter, as the results could be misleading.
- If unsure about the results to a view, use the '**Clear Filters**' filter within '**Filters & Sorts**', to list ALL results which overrides the default set against the view.
- For example the '**Status Update**' view, applies a 'Not Equal to Completed' condition, displaying lines in the plan that have not started and/or are currently in progress.



# Demo Filters

# Projects

*Copying Plans*

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# Copying Plans: *Shortening Plan Creation Time*

- Plans can be copied from either an opened plan directly from CA PPM or a local template/plan (.rmp file).
- Navigate to your destination project in CA PPM and open it (Read-Write) into OWB, then open the source plan in CA PPM/local file.

The screenshot shows the CA PPM interface with multiple windows. A red box highlights the 'New Project 1 - Gantt Chart' window, which is the source plan. Red arrows point from this window to the 'Solution Oversight - Training - Gantt Chart (Read-Only)' window, indicating the destination plan. The 'Solution Oversight' window shows a list of activities with their start and finish dates.

ID	Name	Start	Finish
1	Develop Client Proposals	8/10/2015	5/02/2016
2	Marketing Activities	4/08/2015	4/08/2015
3	Resource Pool Investigation and Staffing	7/08/2015	1/02/2016
4	Website Activities	4/08/2015	4/08/2015
5	2015 Get PMI accreditation for the business	2/02/2016	1/04/2016
6	2015 Update Course Overviews and Base Content	2/02/2016	2/02/2016
7	Training LOB Planning and Follow-up	1/08/2015	1/02/2016
8	Web-based Course Development & Deliver, Google	2/10/2015	9/02/2016

- Copy the plan, paste using the default **'Paste'**, or **'Paste Special'**, then Save.



# Demo Copy Plan

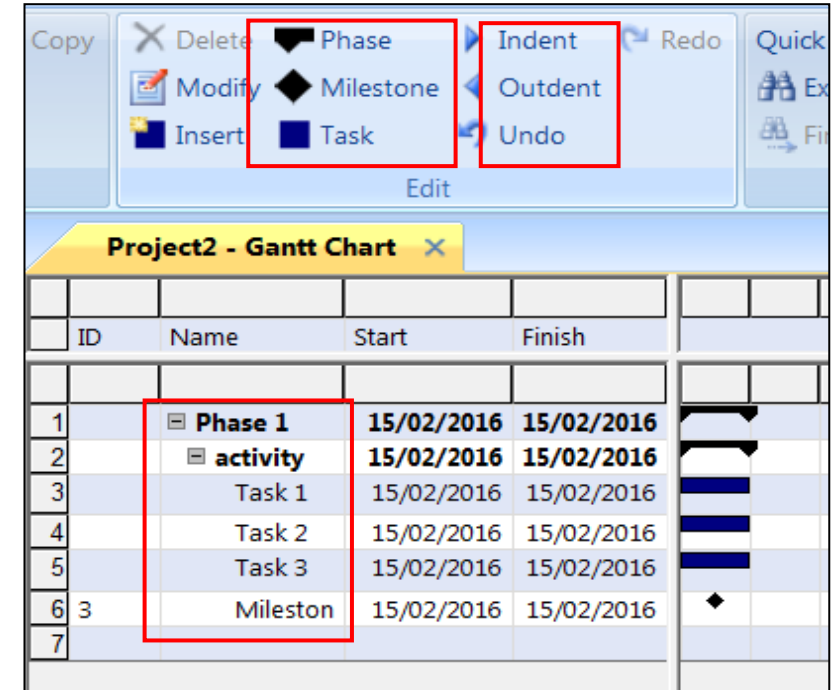
# Projects

*Work Breakdown Structure*

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# Work Breakdown Structure: *The Shortcuts*

- The '**Edit**' section in the ribbon, offers an alternative to column methods, when creating the WBS hierarchy.
- Once rows have been added directly to the plan, it is quicker/useful to use the shortcut icons to determine the type against each row.
- Remember the 'Indent' and 'Outdent' icons only apply to summary level hierarchy.
- The **Edit** section offers an alternative option to setting the hierarchical structure with a few clicks.



# Projects

*Dependencies*

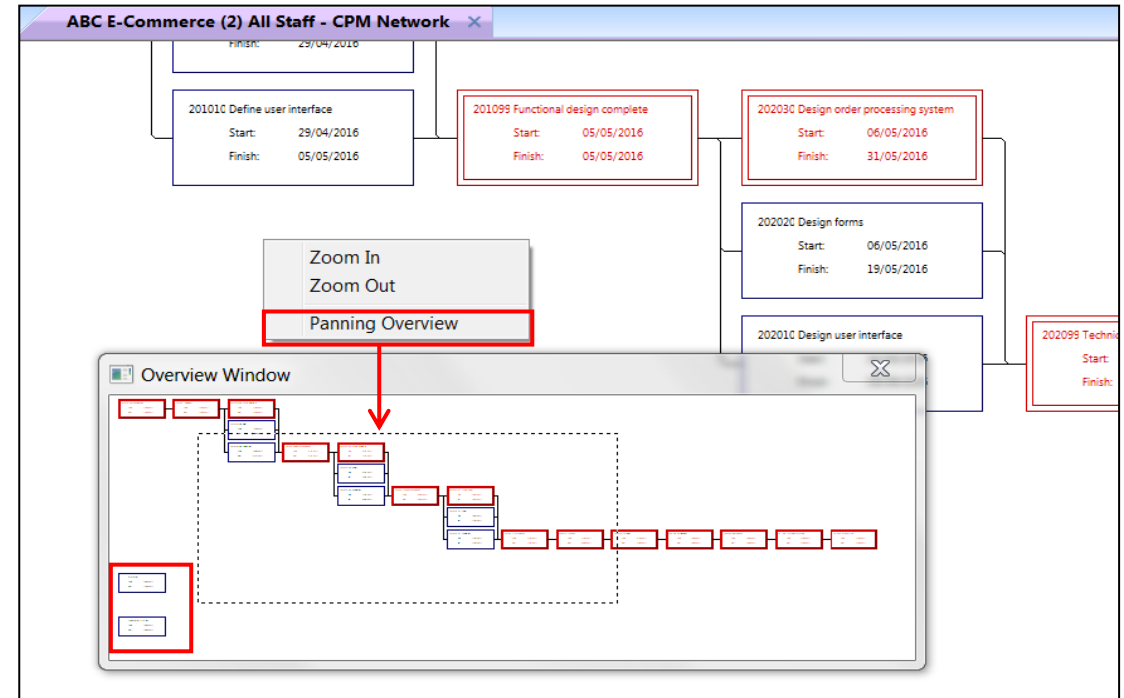
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# Dependencies: *The Quickies*

- For a more robust and logical schedule, especially if autoschedule is to be used, **ALL** tasks and milestones forming part of the prime delivery network must be linked.
- You can make quick linkages by highlighting rows and using right-click options to make chains and/or make predecessors of successors without using the dialog box.
- Use the '**Panning Overview**' within the CPM view to review the network and check for orphaned tasks.
- External dependencies can be applied by right-clicking on a task or milestone and selecting '**Insert External Dependencies**' option.

# Dependencies: *The Quickies*

- A great way to view all network/s in your plan, is to select:
  - The CPM view.
  - Right-click within the main view window.
  - Select planning overview.
- From this view, you can see at a glance any task(s) which are not connected to a network.



- Remember you can also define links between tasks/milestones in this view using the drag and drop method.
- **Note: No summary levels are displayed in this view.**

# Projects

*Assignments*

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# Assignments: *Quick Assignments*

- Defining task assignments doesn't need to be onerous. You can use drag 'n' drop within a suitable view.

- Multiple resources can be selected for bulk assignment.

Task ID	Task Name	Resource	Hours	Front
31 204099	Testing complete			
32 205000	Development Phase Sign-off			
33 205010	Conduct phase end review			
34 205099	Phase signed off			
35				
1 PM	Project Manager	Project Manager		
2 BA	Business Analyst	Business Analyst		
3 SA	Systems Analyst	Systems Analyst		
4 TE				
5 LT				

Task ID	Task Name	Resource	Hours	Front
31 204099	Testing complete			
32 205000	Development Phase Sign-off			
33 205010	Conduct phase end review	PM	8.00	Front
34		BA	8.00	Front
35		SA	8.00	Front
36		TE	8.00	Front
37		LT	8.00	Front
38		LP	8.00	Front
39		JP	8.00	Front

- Multiple tasks can be selected to assign to a resource.

Task ID	Task Name	Resource	Hours	Front
26 204010	Design tests			
27 204020	Conduct tests			
28 204030	Analyze test results			
29 204099	Testing complete			
30 205000	Development Phase Sign-off			
31 205010	Conduct phase end review			
32 205099	Phase signed off			
33				
1 PM	Project Manager	Project Manager		
2 BA	Business Analyst			

Task ID	Task Name	Resource	Hours	Front
25 204000	Testing			
26 204010	Design tests	PM	4.00	Front
27 204020	Conduct tests	PM	2.00	Front
28 204030	Analyze test results	PM	8.00	Front
29 204099	Testing complete			
30 205000	Development Phase Sign-off			
31 205010	Conduct phase end review	PM	8.00	Front

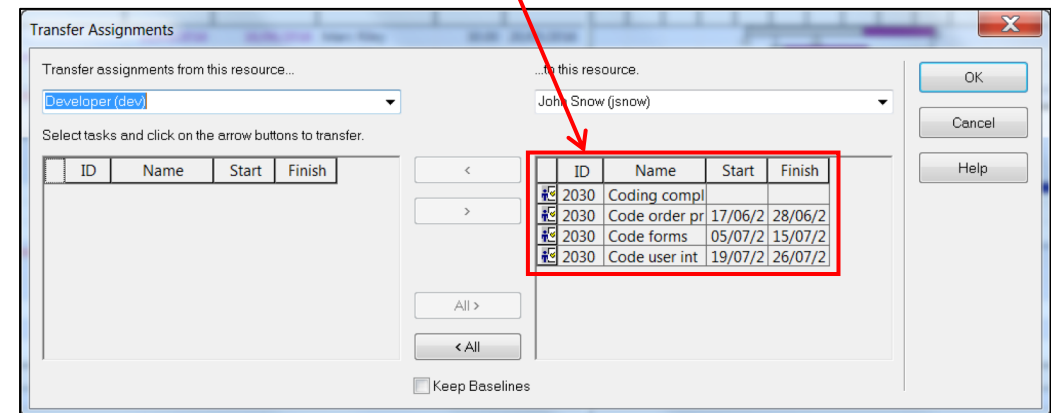
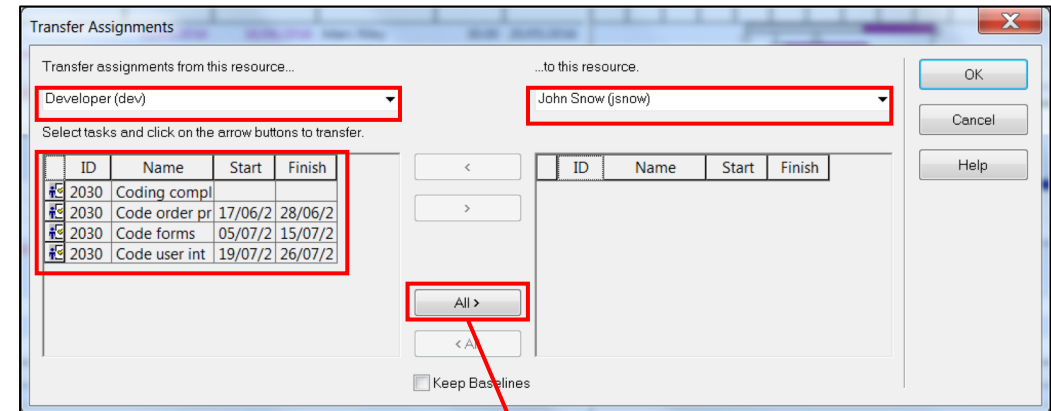
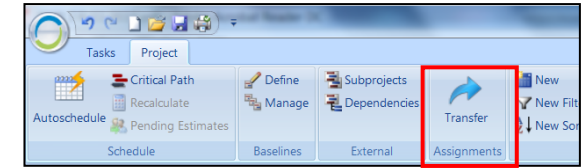
**Remember:** Remove (release) an assignment, you need to use the Task Properties >Resources tab.



# Assignments: *Transfer Assignments*

- Assignments can easily be transferred from one role or resource to another role or resource.

- Use the **left** dropdown to select the role/resource with the current assignments to be transferred.
- Use the **right** dropdown to select the role/resource receiving the assignments.
- Click '**All>**' for all of the assignments to be transferred.
- Click **OK** for the assignments to be applied to the plan.



# Demo Dependencies and Assignments

# Projects

*Autoschedule*

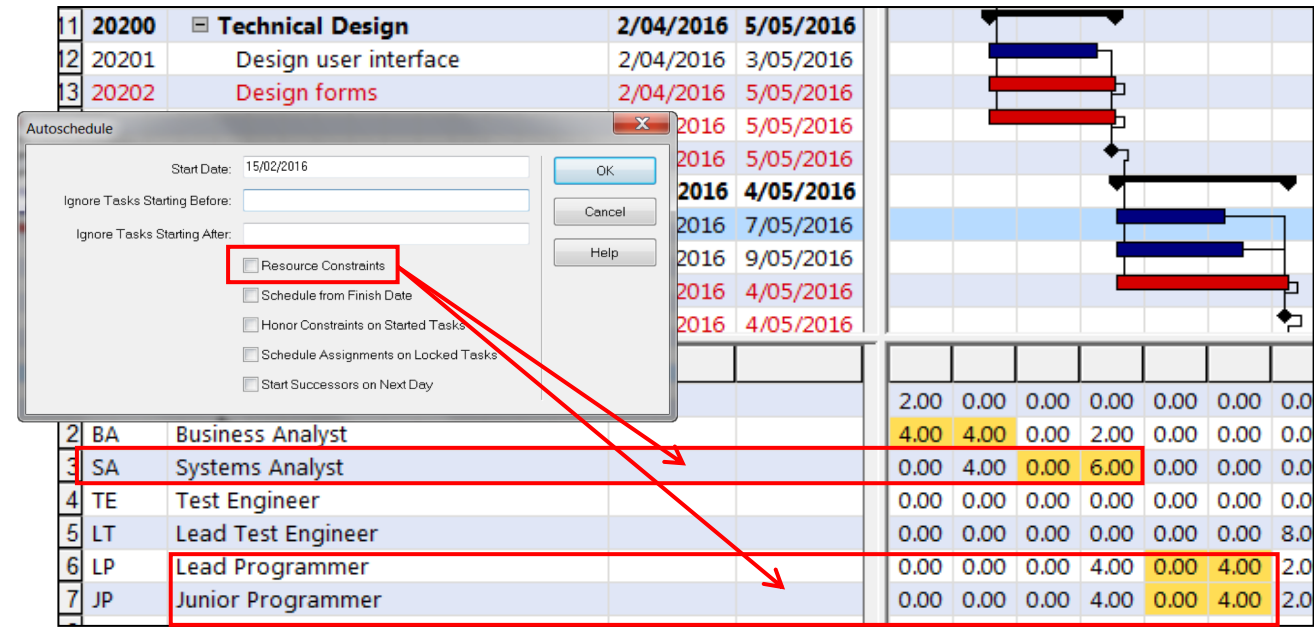
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# Autoschedule: *Magic Button?*

- Autoschedule is a great way to:
  - Resolve task and resource over-commitments.
  - Resolve dependency violations.
  - Calculate critical path.
- However it may not always be the answer to all your scheduling requirements. If the plan has not been set up correctly, it may not calculate to the most optimised results.
- In many cases, Autoschedule is used to achieve a preliminary ‘first cut’, to then manually fine-tune thereafter.
- When used at a high-level, can be used to see for example resource ‘bottle-necks’ or violations. This helps with understanding who and when more resource may be required.

# Autoschedule: *Magic Button?*

- Deselect '**Resource Constraints**' to see where the most resource is required to complete activities
  - The default is checked to resource any over-commitments.



- 'Selective-scheduling' can be used to schedule only the rows you want
  - Simply highlight the rows to be scheduled (row selector).
  - Then right-click on the highlighted row and select Autoschedule.

# Autoschedule – ‘Syntax’

- First, Autoschedule schedules work that has no flexibility
  - actual work
  - fixed assignments
  - all work on locked tasks
- reduces the remaining availability accordingly.
- Next, Autoschedule processes the remaining tasks in order of a calculated priority (see below) subject to task dependencies. As each task is processed, remaining availability is reduced accordingly.
  - The calculated priority is based on the following factors, considered in this order.
  - If the task has a Must Start On or Must Finish On date constraint
  - Task Priority (lower values rank higher)
  - Task Float (lower values rank higher)
  - If the task is started
    - WBS order (i.e., the physical location that it is seen in a view; tasks towards the top rank higher)
  - If a task "ties" with another task, the next factor is taken into account. Thus, for example, a task with no date constraint and a priority of 5 will be scheduled before another task that also has no date constraint and a priority of 5 if the first task's float is less than the second task's.
- Autoschedule gives priority to constrained tasks over non-constrained task, and to inflexible constraints (such as "Must Start On") over flexible constraints (such as "Start No Later Than"). Constraints are overridden when it would violate a dependency or over allocate resources.

# Demo Autoschedule

# Projects

*Baseline*

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# Baseline: *Did You Know?*

- These are some (*not all*) of the data 'captured' during baselining.
- After baselining, plan variances can be analysed using the '**Variance Analysis**' view.
- Negative values against tasks are date slippages or usage (hours) greater than baseline.

This Data:	Is Copied to:
Start	Baseline Start
Finish	Baseline Finish
Duration	Baseline Duration
Usage	Baseline Usage
Loading Pattern	Baseline Loading Pattern

Controlling	17			Baseline:	12/04/2016	04/05/2016	130.00
	18			Variance:	-4	0	-10.00
Status Update	19	Define user inte	Not started	Current:	29/04/2016	04/05/2016	30.00
	20			Baseline:	29/04/2016	04/05/2016	30.00
	21			Variance:	0	0	0.00
Unused Availability	22	Define forms	Not started	Current:	22/04/2016	28/04/2016	40.00
	23			Baseline:	22/04/2016	28/04/2016	40.00
	24			Variance:	0	0	0.00
	25	Define order pr	Not started	Current:	18/04/2016	27/04/2016	70.00
	26			Baseline:	12/04/2016	21/04/2016	60.00
Variance Analysis	27			Variance:	-4	-4	-10.00
	28	Functional desi	Not started	Current:	04/05/2016	04/05/2016	
	29			Baseline:	04/05/2016	04/05/2016	
	30			Variance:	0	0	0.00
Revise Schedule	31	Technical Desig	Not started	Current:	28/04/2016	08/06/2016	300.00
	32			Baseline:	04/05/2016	08/06/2016	280.00
	33			Variance:	4	0	-20.00
	34	Design user int	Not started	Current:	30/05/2016	08/06/2016	60.00
	35			Baseline:	30/05/2016	08/06/2016	60.00
	36			Variance:	0	0	0.00
	37	Design forms	Not started	Current:	10/05/2016	23/05/2016	100.00
	38			Baseline:	04/05/2016	18/05/2016	80.00
	39			Variance:	-4	-3	-20.00
	40	Design order p	Not started	Current:	28/04/2016	23/05/2016	140.00
	41			Baseline:	04/05/2016	30/05/2016	140.00
	42			Variance:	4	4	0.00

# Demo Baseline

# Projects

*Plan Closure*

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# Plan Closure: *The Plan's 'Hot List'*

- Let's take a look at the initial items that will need addressing:
  - **Assignments** – remove any unused ETCs.
  - **Tasks** - close for time, amend finish date and complete.
  - **Staff** - close for time entry.
  - Use views to help locate weekly exceptions, typically these views have conditional filters, for example the '**Status Update**' view.

# Questions?



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## 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.



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