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Resource Management | OOTB Introduction

Your Guide: Sara Garvey

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

Part I: Introduction

Discuss Rego Base Configuration

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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.

Part II: Resource Management Overview

Accessing Resources

Resource Properties

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Resource Management Definition

- Resource Management is the efficient and effective use of organization resources when they are needed
- CA PPM 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)

Part III:
Resource Access / Properties

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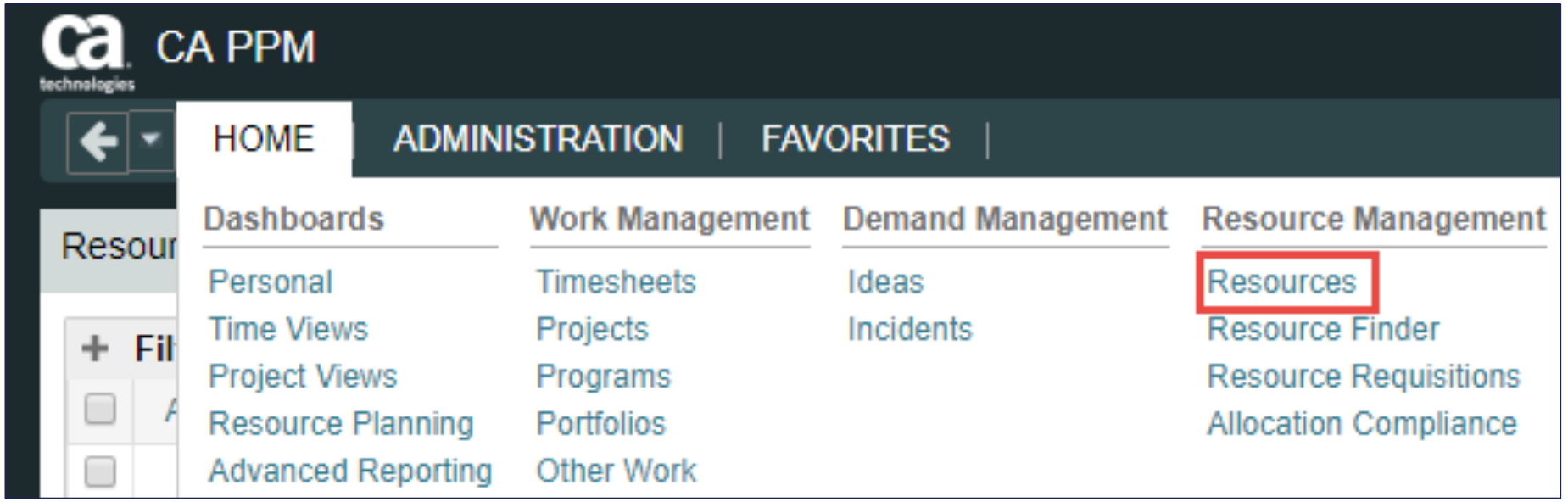
Access Resources

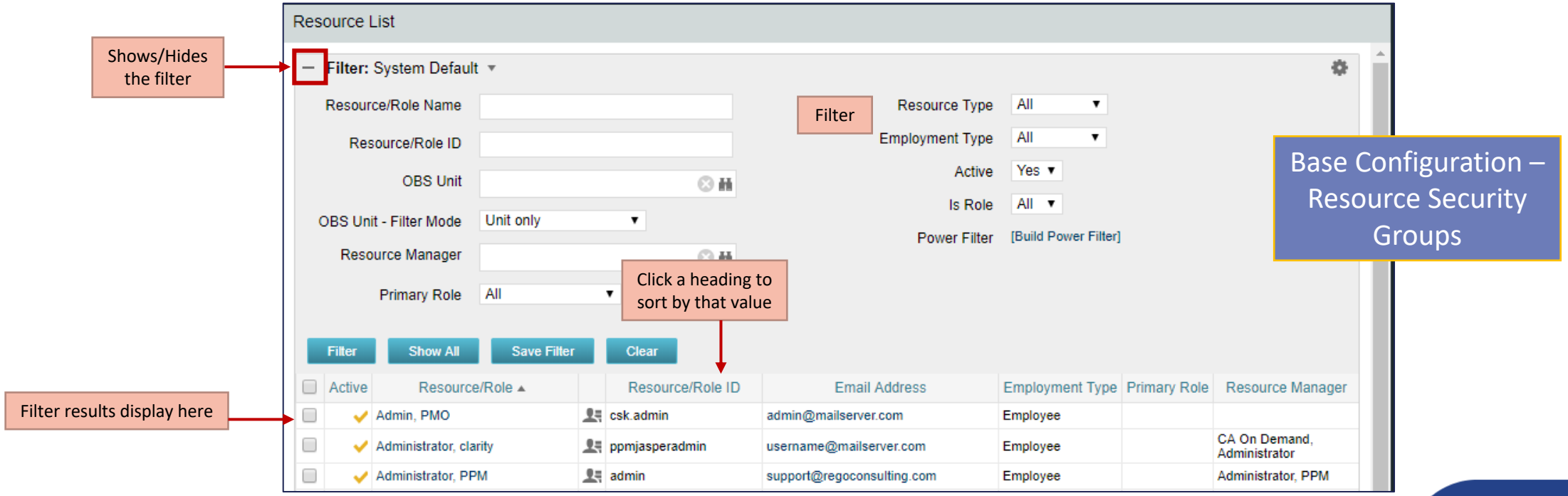
- To access resources, hover over Home, then click Resources under Resource Management
- Note that navigation bar links and section headers may be different depending on how your CA PPM administrator has configured the interface
  - Also be aware that access depends on having the correct security rights.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



Resource List

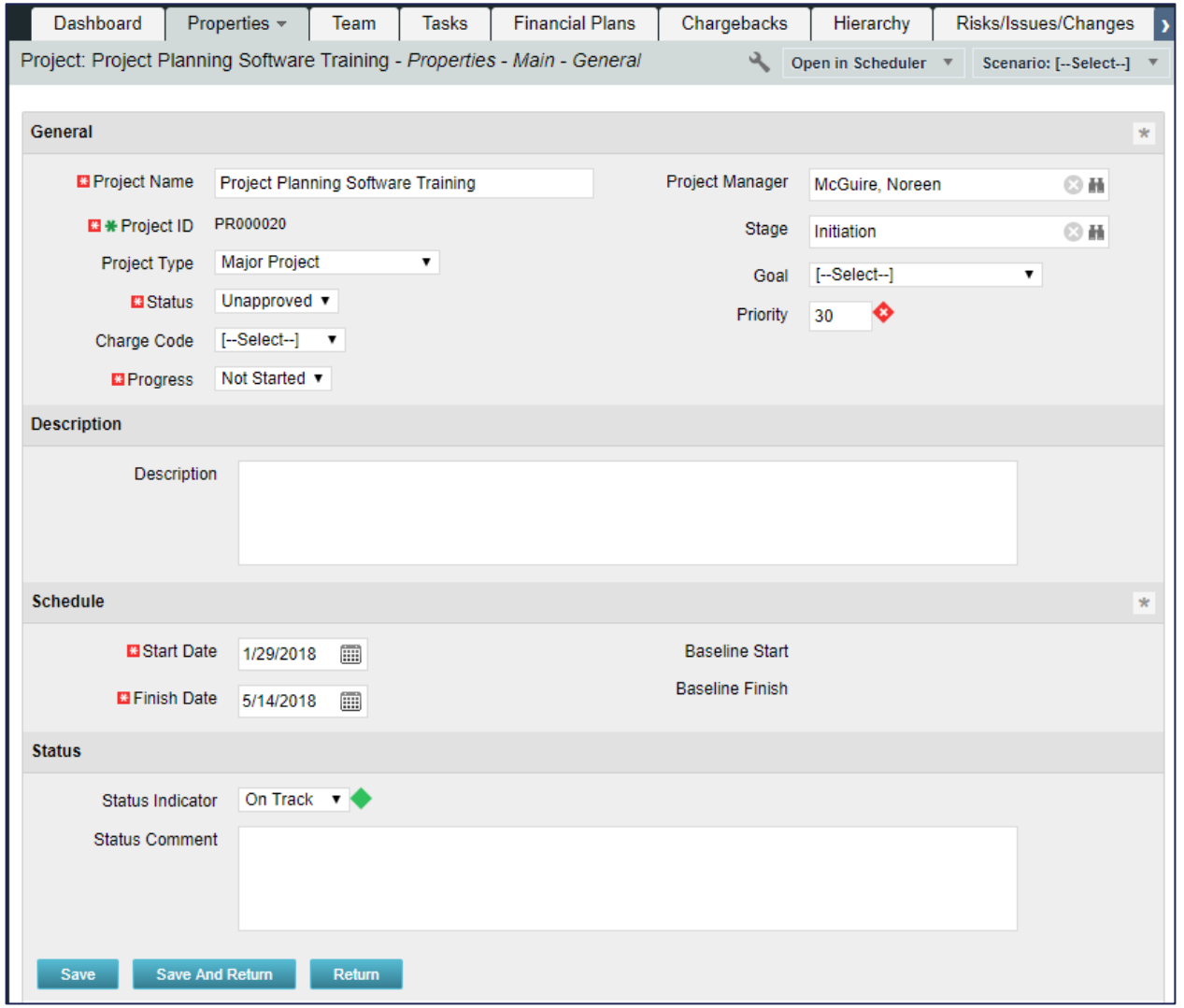
Resource List view displays all the resources the end user has access to and is divided into two sections

- 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 CA PPM for items meeting specific criteria
  - The bottom portion of the screen is the list that displays the results of your filter criteria



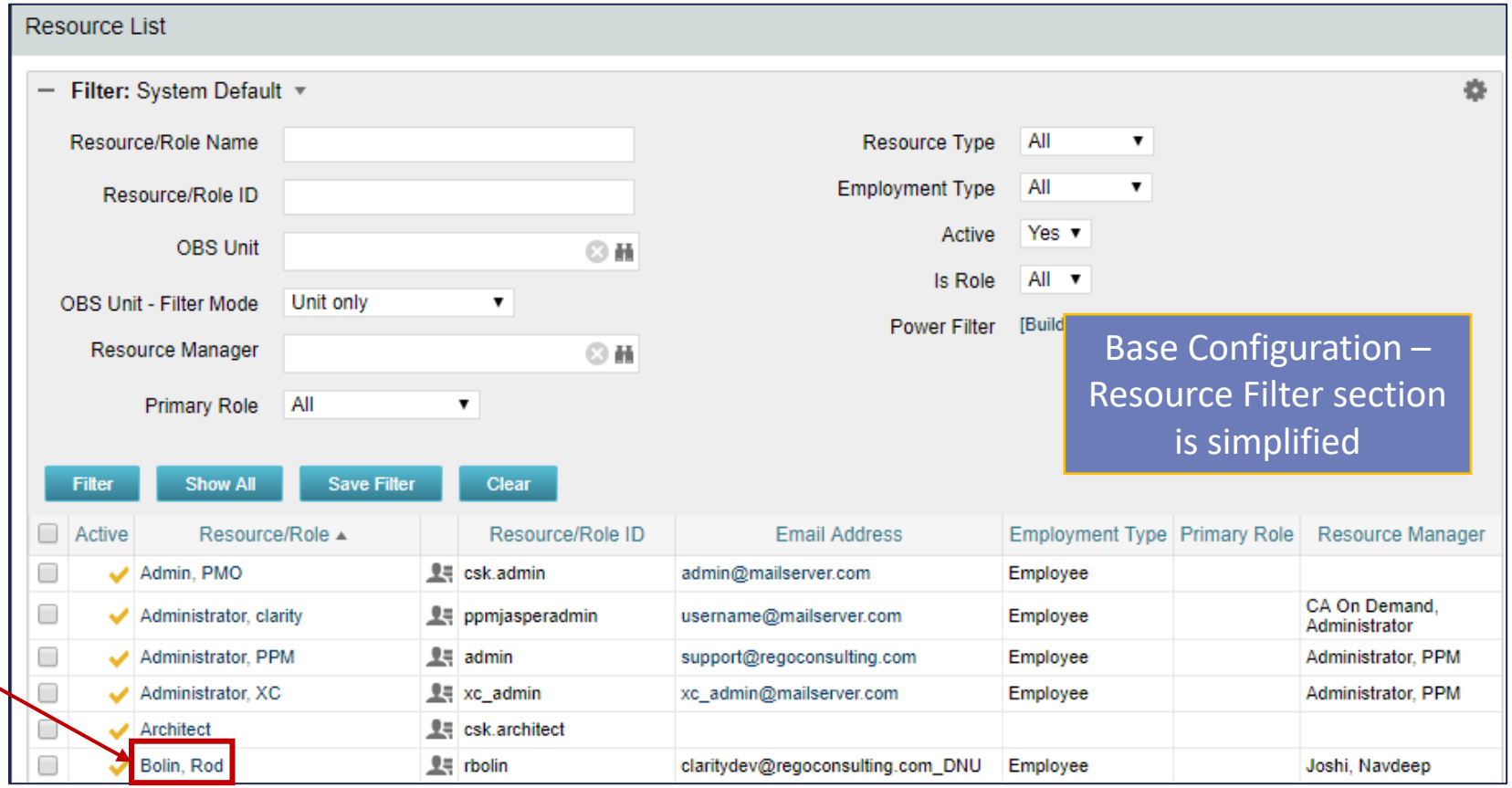
Resource Security

- Access to the resource is controlled via CA PPM 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



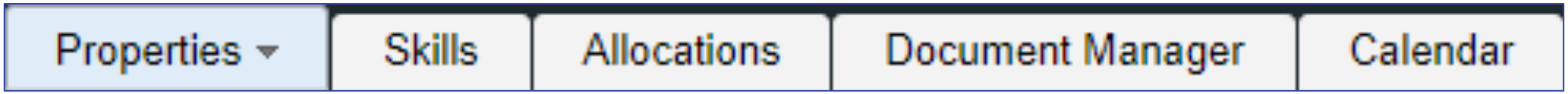
Accessing Resources

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



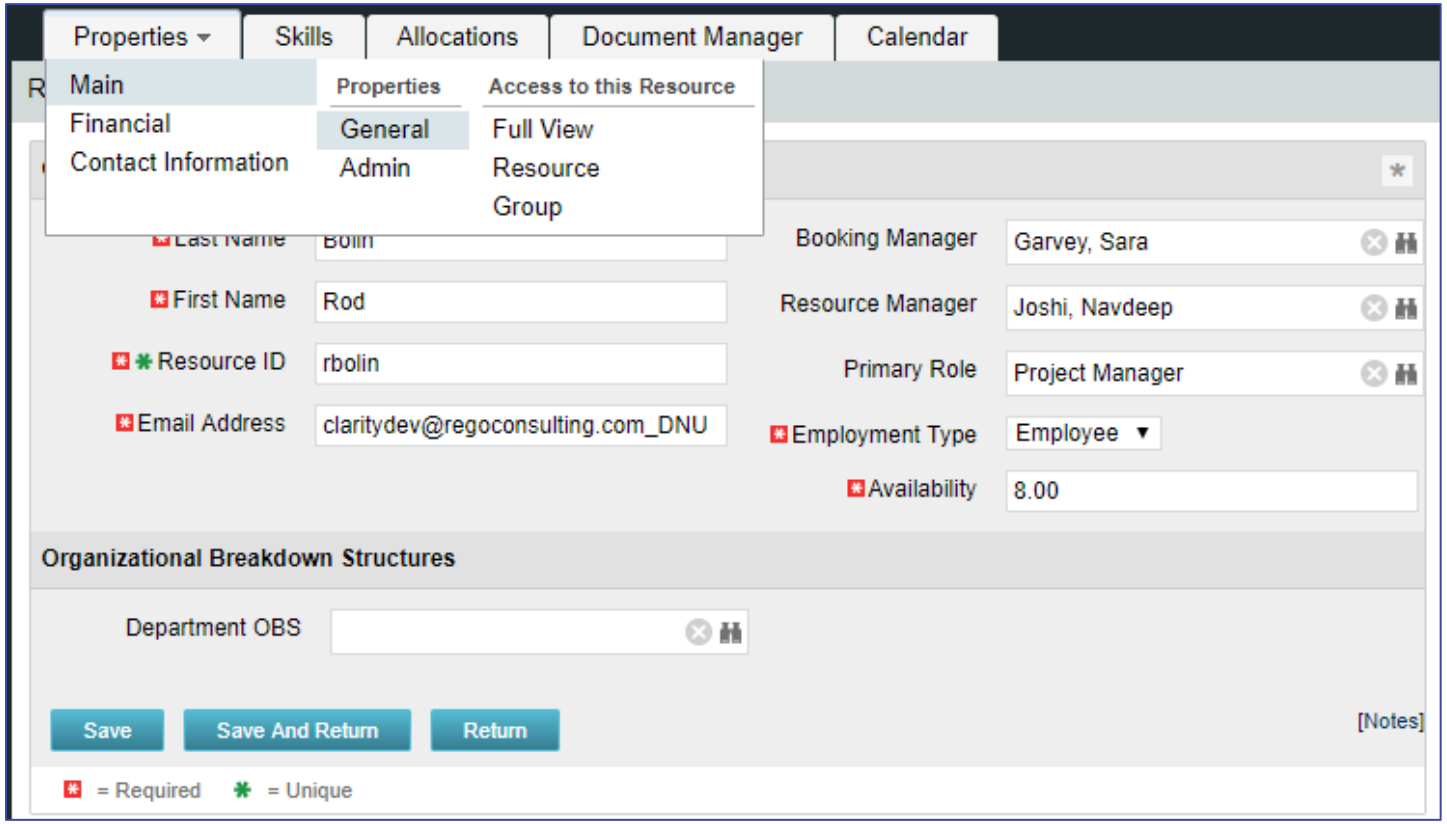
The Resource Profile

- In order for Resource Management to function appropriately, it is necessary for the fundamental resource data within CA PPM 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



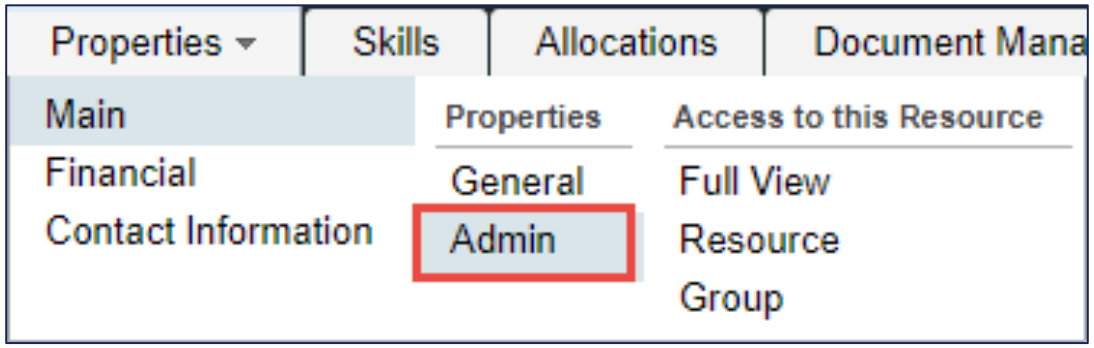
Resource Properties

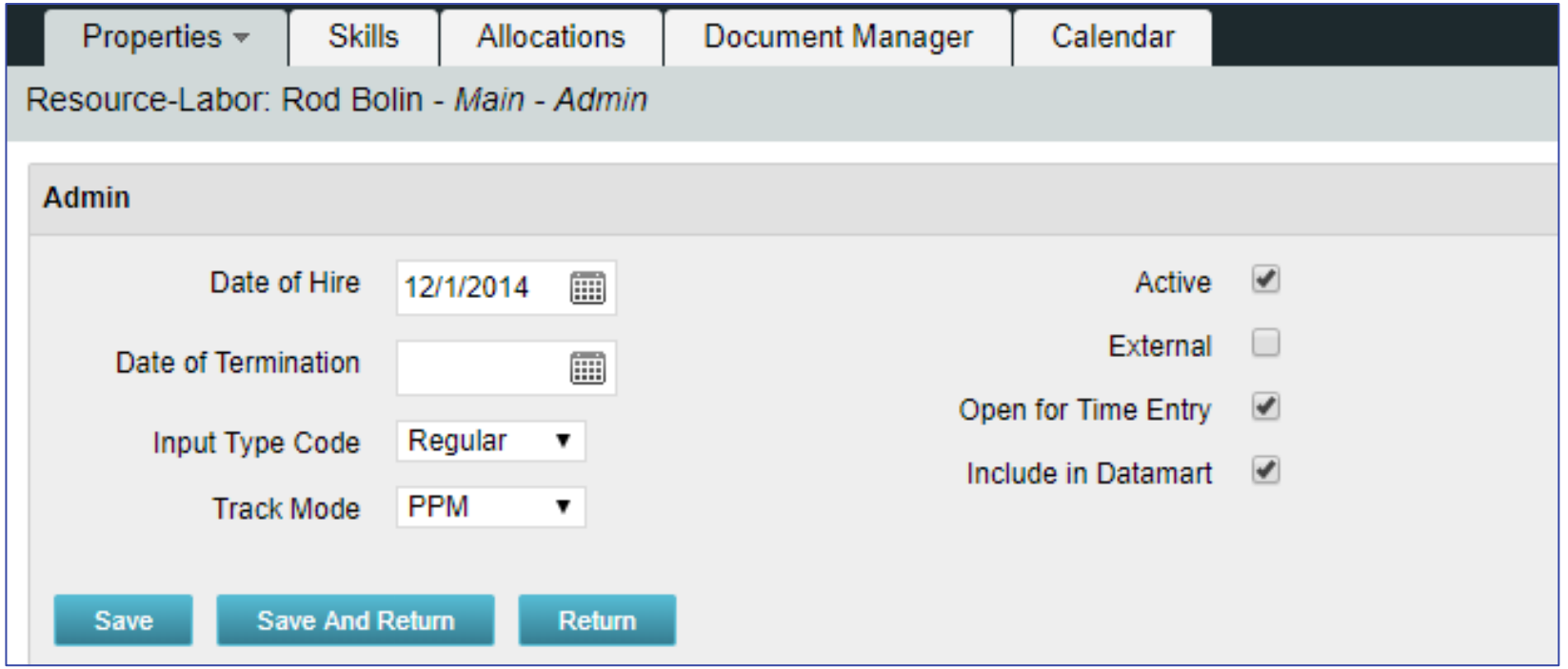
- Base Configuration - General
  - Sections organized
  - Attributes renamed, hidden or moved to other subpages
  - Defaults set
  - Time reporting periods created
  - Properties tab dropdown updated with concise subpage options



Resource Properties

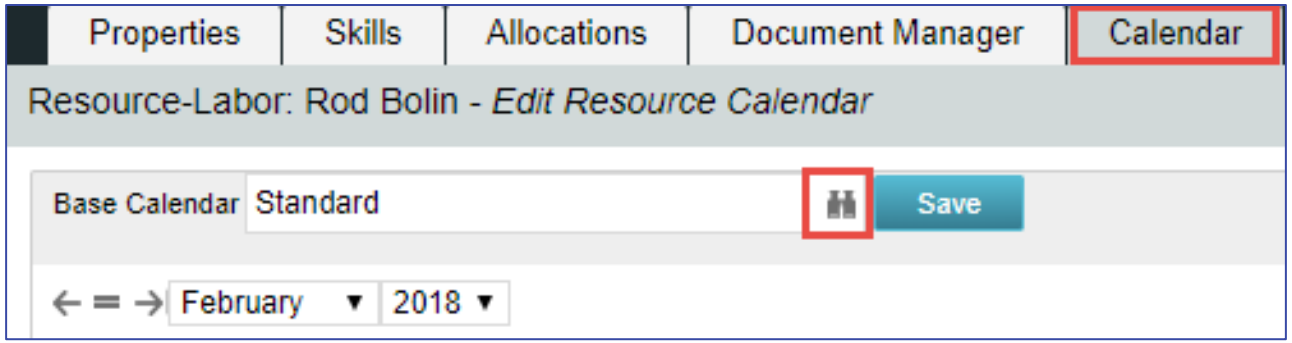
- Admin Subpage
  - Security restricted
  - Defaults set
  - Input Type code setup





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

Part IV: Resource and Role Allocation

Allocating a Resource

Update Resource Allocation

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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
- 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

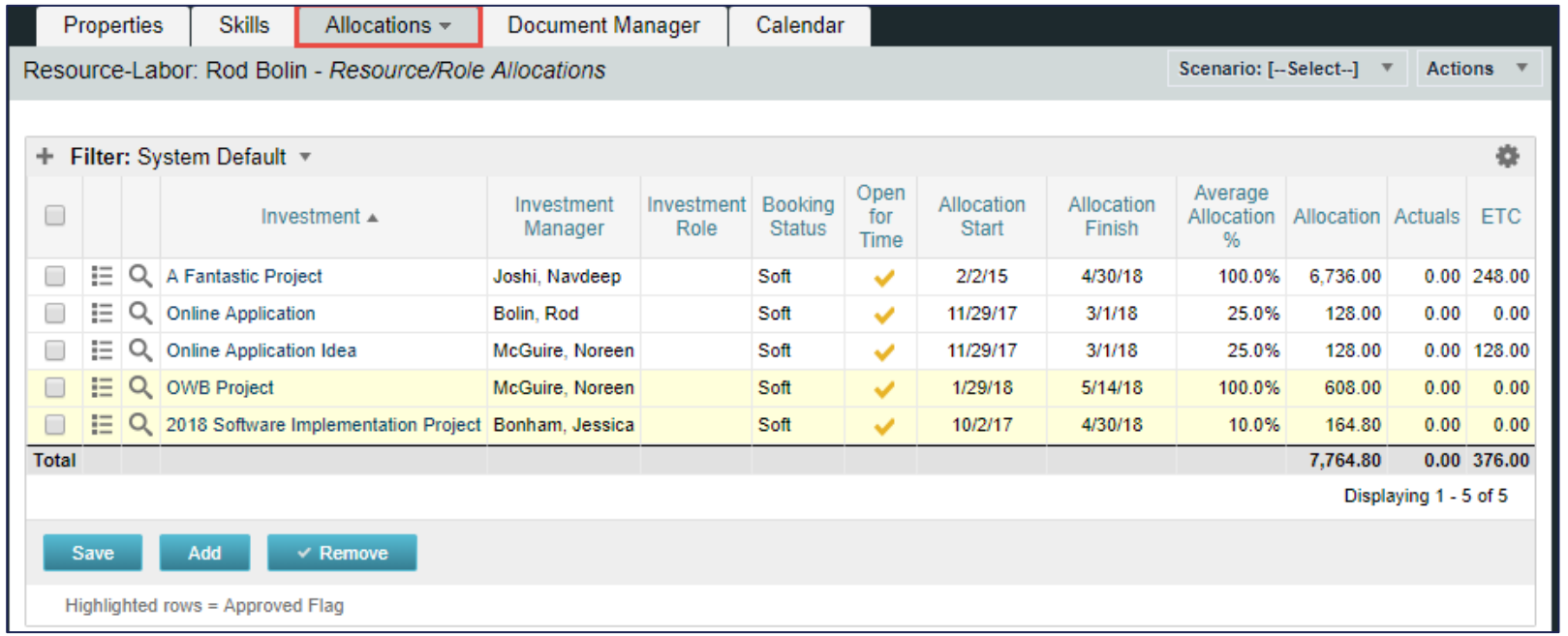
- Resources are Hard Booked
- Typically the RMs have the Hard Book right for their direct resources

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)

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

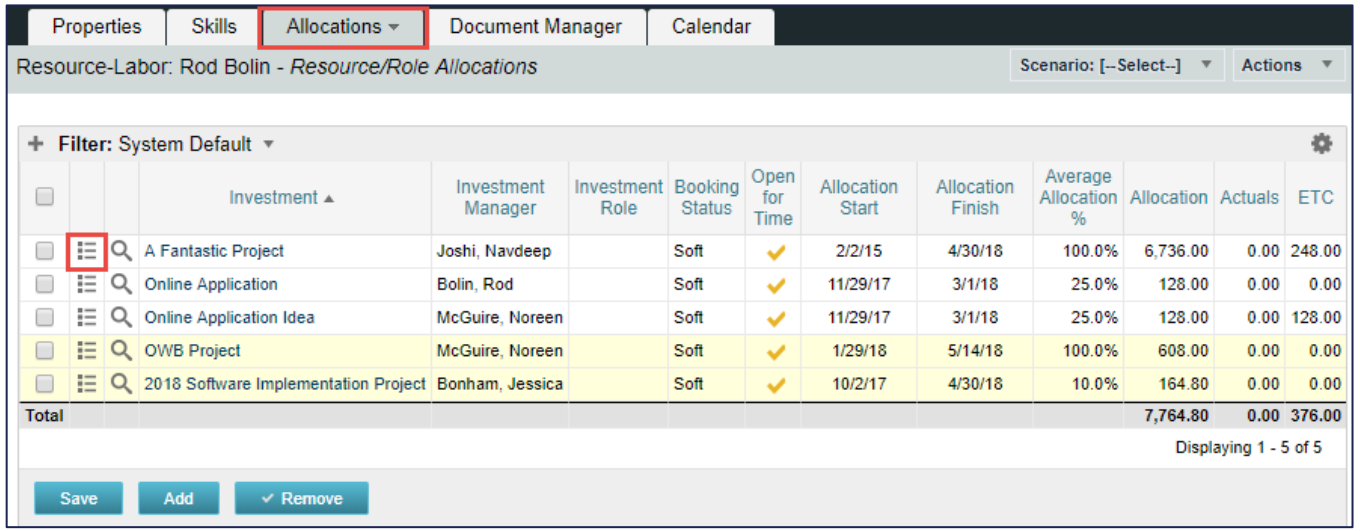


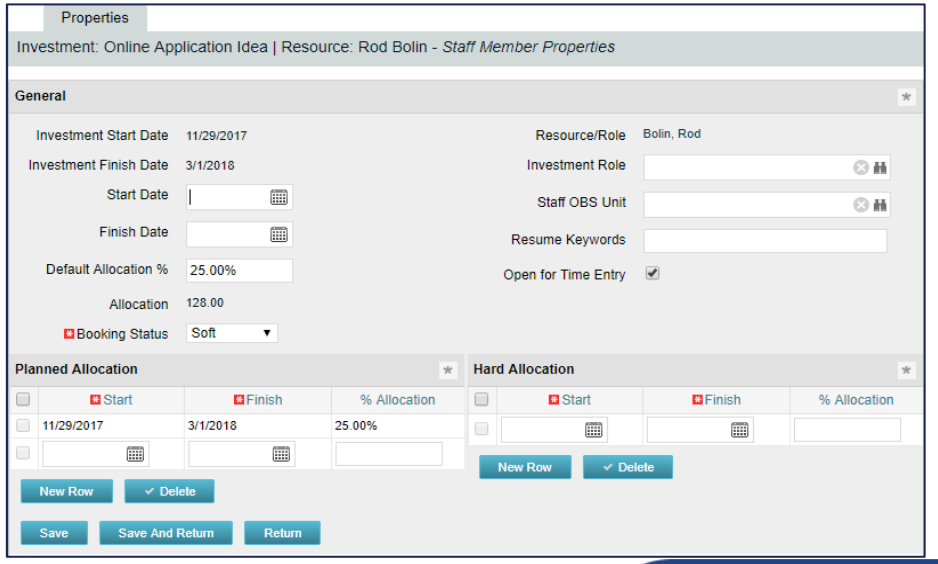
Investment	Investment Manager	Investment Role	Booking Status	Open for Time	Allocation Start	Allocation Finish	Average Allocation %	Allocation	Actuals	ETC
A Fantastic Project	Joshi, Navdeep		Soft	✓	2/2/15	4/30/18	100.0%	6,736.00	0.00	248.00
Online Application	Bolin, Rod		Soft	✓	11/29/17	3/1/18	25.0%	128.00	0.00	0.00
Online Application Idea	McGuire, Noreen		Soft	✓	11/29/17	3/1/18	25.0%	128.00	0.00	128.00
OWB Project	McGuire, Noreen		Soft	✓	1/29/18	5/14/18	100.0%	608.00	0.00	0.00
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

Update Resource Allocation Details

- CA PPM 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





Part V: Resource Views

Dashboard and Portlet views

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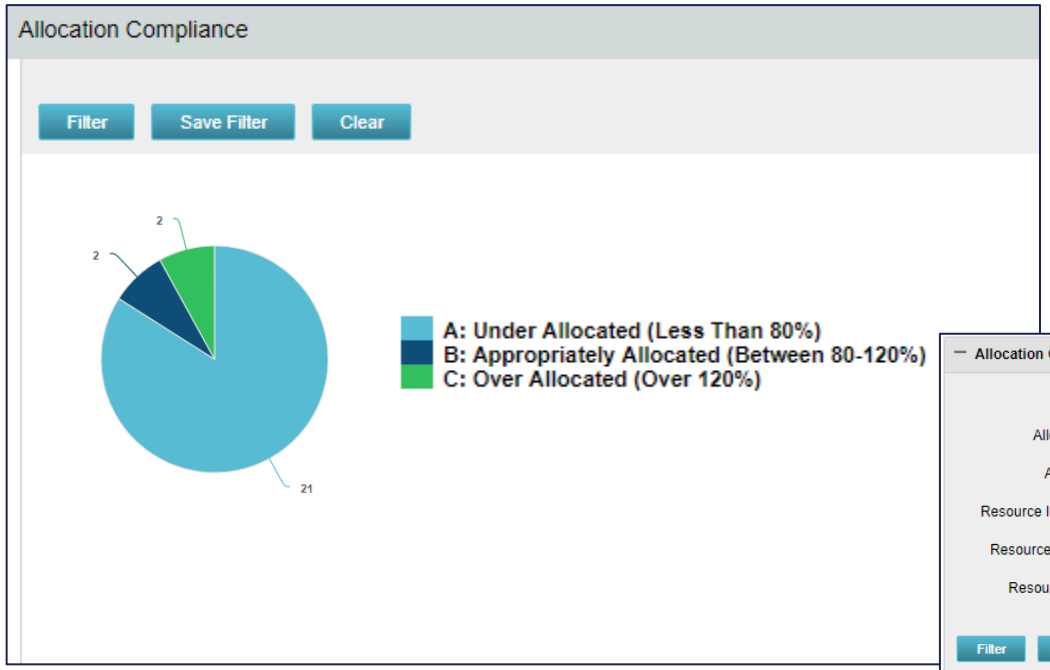
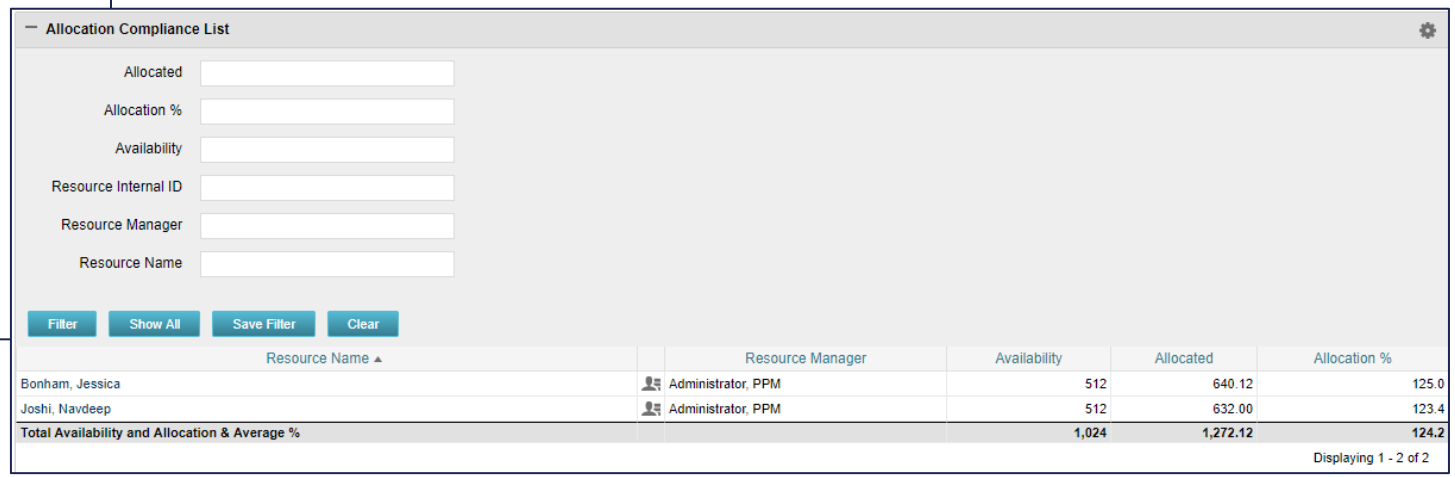
Base Configuration Portlets – Allocation Compliance

- 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

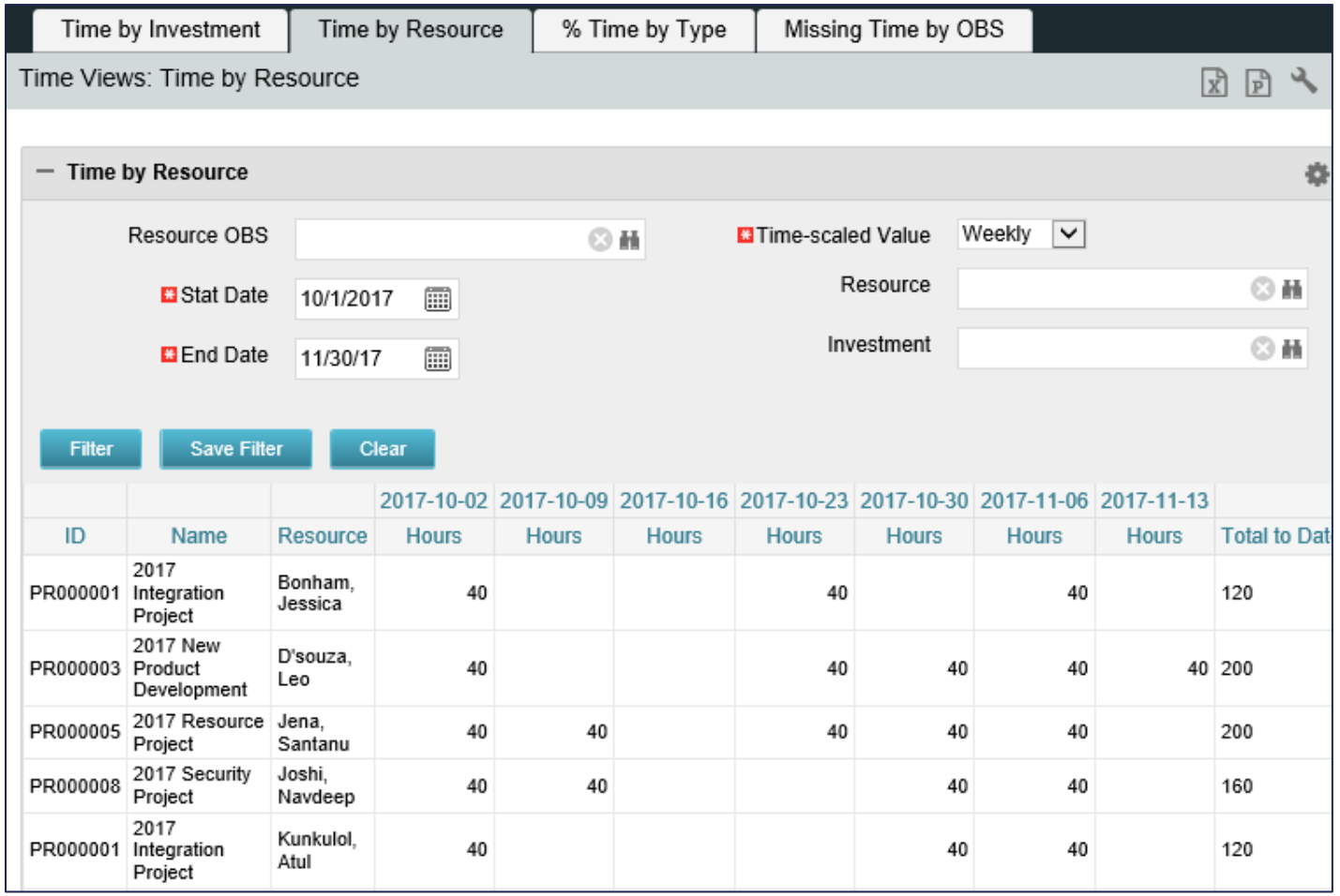


- Additional filter criteria can be used in the Allocation Compliance List



Base Configuration Portlets

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



			2017-10-02	2017-10-09	2017-10-16	2017-10-23	2017-10-30	2017-11-06	2017-11-13	
ID	Name	Resource	Hours	Hours	Hours	Hours	Hours	Hours	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

Part VI: Resource Management in the Modern UX

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Modern UX Overview

- The Modern UX provides a new way for PMs, RMs and Team Members to perform the majority of their Project and Resource Management-related activities
- Modern UX became available with version 15, and functionality has been added/improved with each release of 15.1 through 15.4. Notes on subsequent slides are related to release 15.4

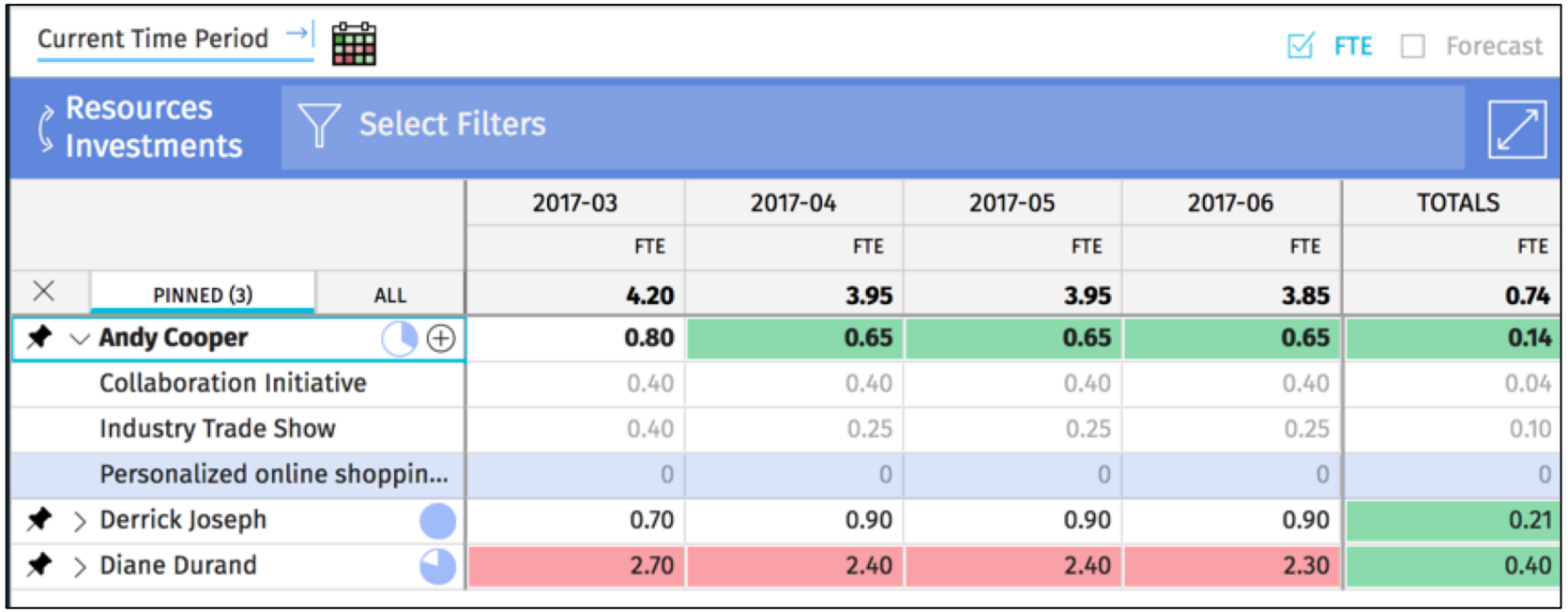
Modern UX Security Rights

- New security rights, related to the new UX, are available in 15.4:

Security Rights Related to the New UX		New in 15.4
General		
Classic PPM - Navigate	Allow access to Classic PPM from new PPM UI	
Blueprints		
Blueprint - Create Copy	Allows user to create a copy of an existing Blueprint. Includes Blueprint - View - All right.	
Blueprint - Delete - All	Allows user to delete all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.	
Blueprint - Edit - All	Allows user to edit all Blueprints except the Standard Blueprint. Includes Blueprint - View - All right.	
Blueprint - View - All	Allows user to view all Blueprints.	
Projects		
Project Management - Navigate	Allows user access to the project management pages in the new user experience. The user will only be able to view information for projects to which the user has access.	
Resource Management / Staffing		
Roadmap - Author - All	Allows the Roadmap Author to view, edit and delete the Roadmap and manage roadmap-specific picklists in the new user experience.	x
Roadmap - Create	Allows user to create Roadmaps in the new user experience. The creator of the Roadmap automatically becomes the Author and can edit or delete the Roadmap.	x
Roadmap - Delete - All	Allows user to view and delete all Roadmaps in the new user experience.	x
Roadmap - Edit - All	Allows user to view and edit all Roadmaps and manage roadmap-specific picklists in the new user experience.	x
Roadmap - Navigate	Allows user access to the Roadmap pages in the new user experience. The user will only be able to view information for Roadmaps to which the user has access.	x
Roadmap - View - All	Allows user to view all Roadmaps in the new user experience.	x
Resource Management / Staffing		
Staffing - Navigate	Allows user access to the resource staffing pages in the new user experience. The user will only be able to view staffing information for resources to which the user has access.	
Resource Forecast Rate - Edit	Allows user to view resource forecast column in Staffing grids and edit forecast rate in flyout in the new user experience. Includes Resource Forecast Rate - View right.	
Resource Forecast Rate - View	Allows user to view resource forecast column in Staffing grids and forecast rate in flyout in the new user experience.	

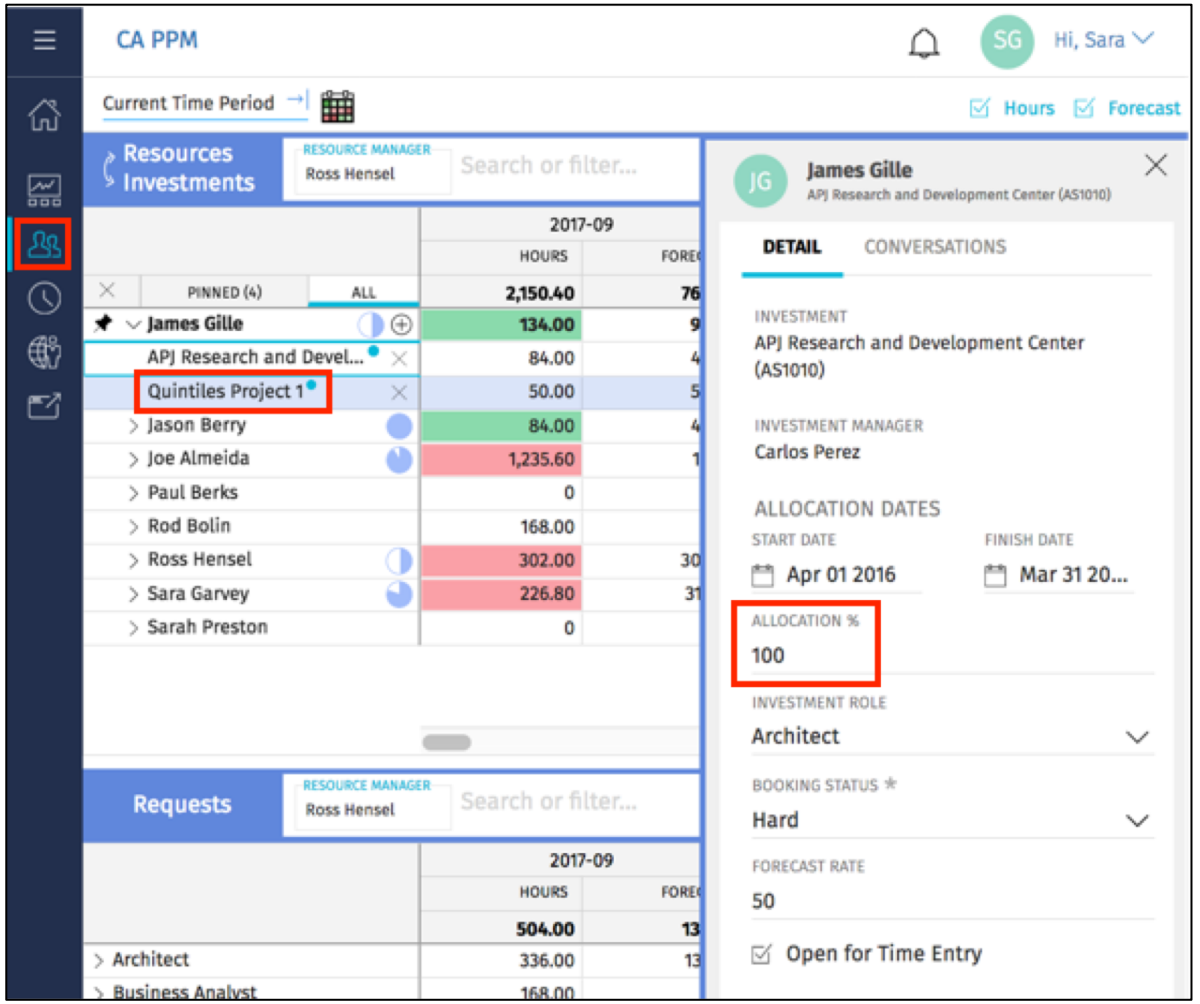
Staffing Overview

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



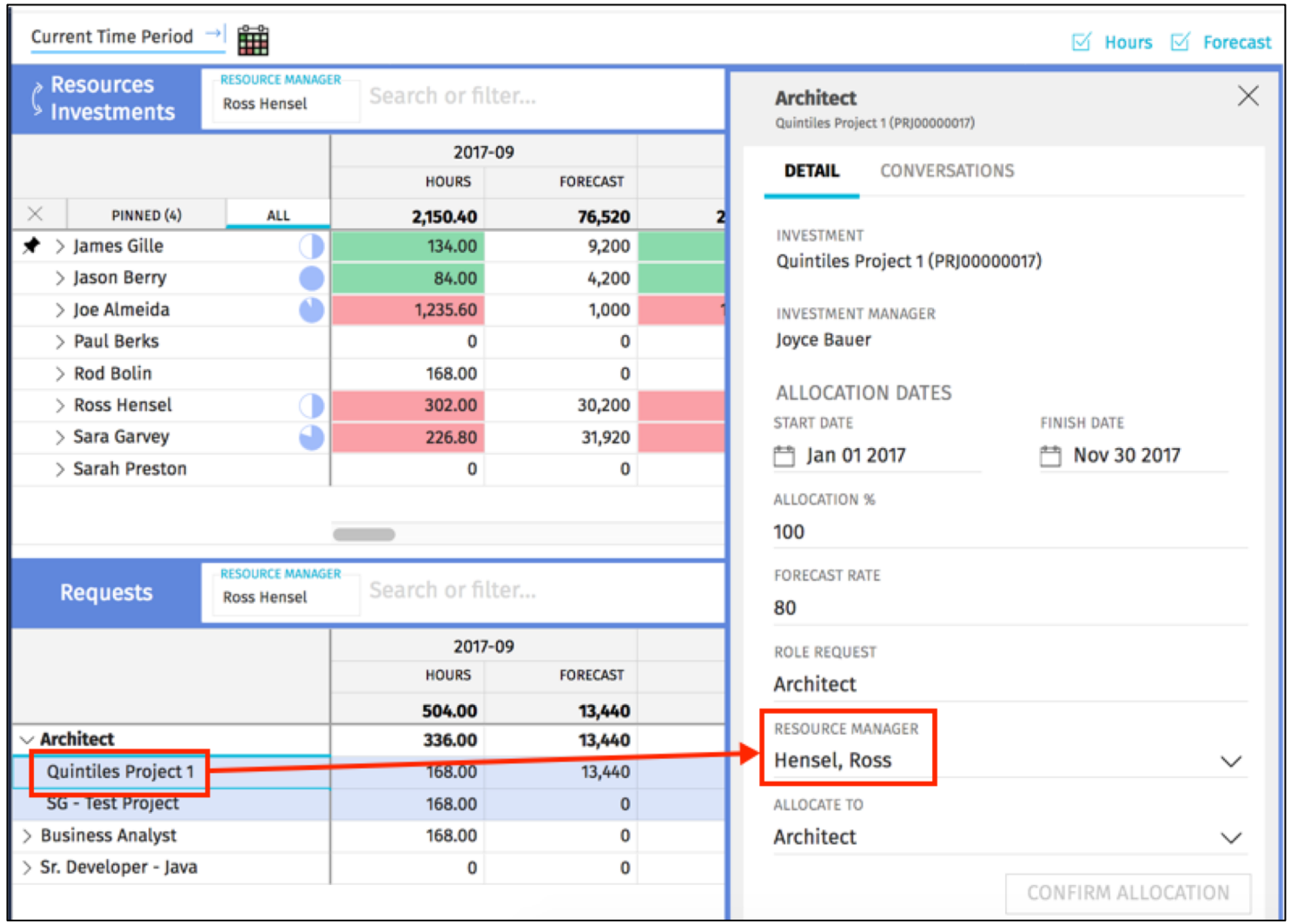
Allocation Details

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



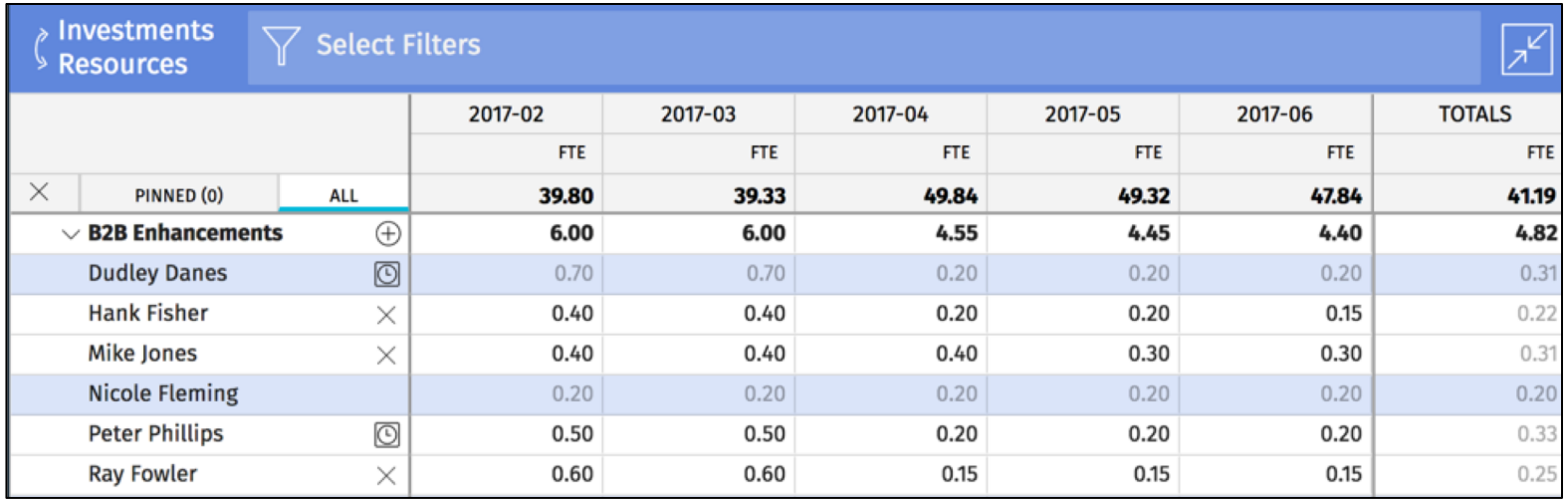
Role Requests

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



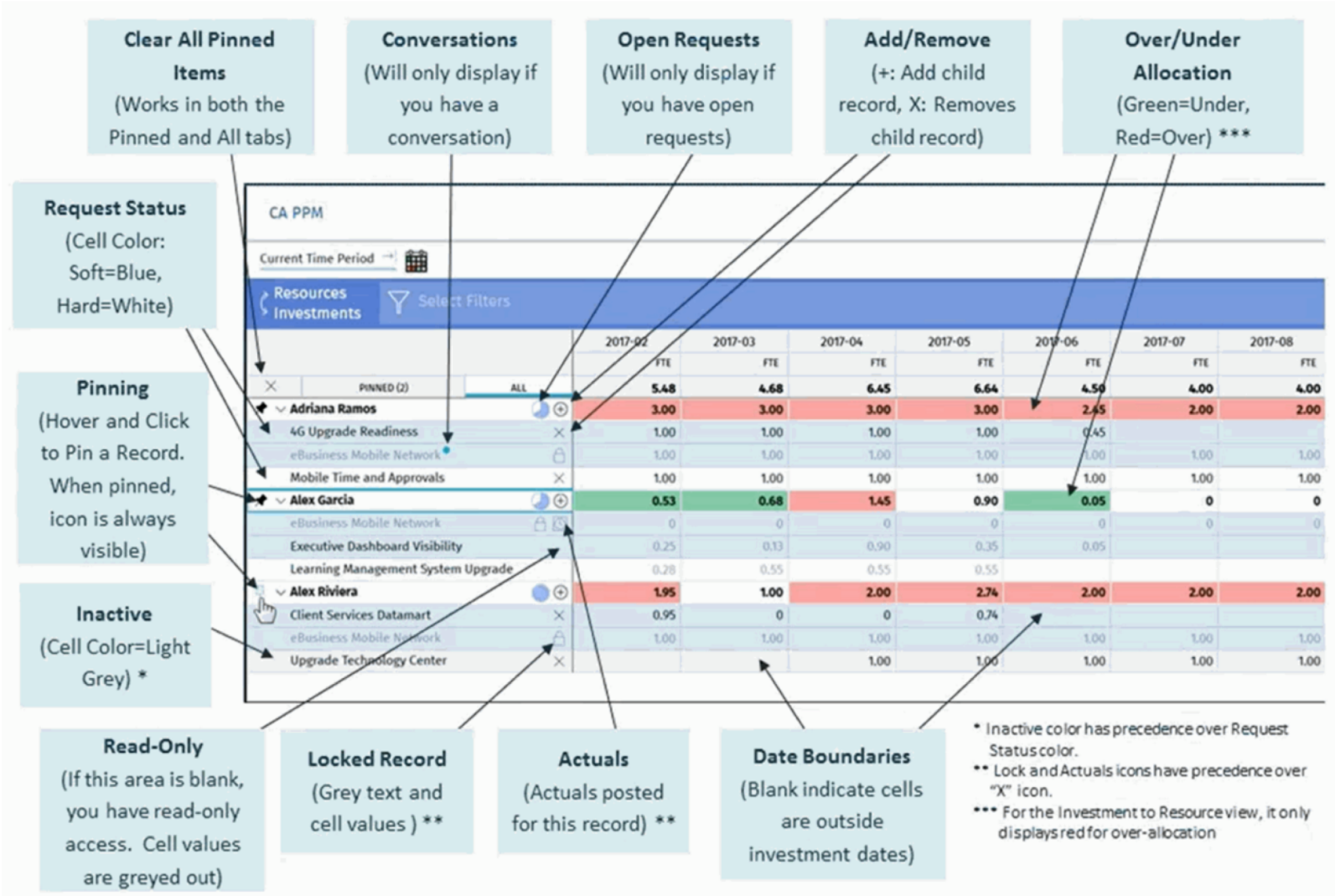
New UX: Resource Management (2)

- 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



	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)



Questions?

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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.

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