

Resource Manager | Best Practice “Day in the Life”

Your Guides: Clayton Reynolds and Jacob Cancelliere

Introductions

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



Agenda

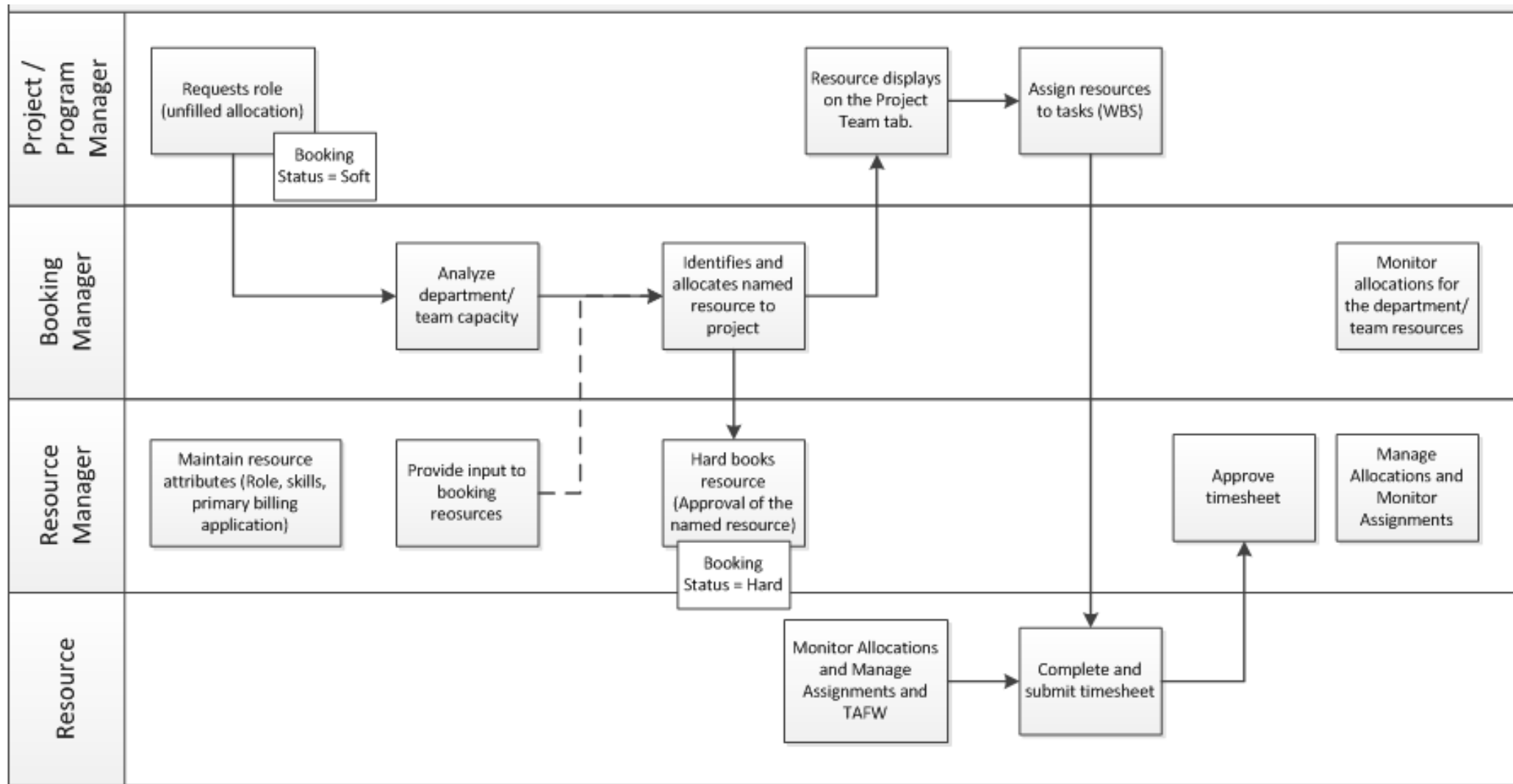
- “Best Practice” Resource Management Process
- Weekly Checklist for Resource Managers
- Tips and Tricks
- Agile Team Resource Management Options
- RegoXchange Portlets to Make Life Easier

Open Discussion #1

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



“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 'Workload' portlet for 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 using the Team Member Task Summary	For people that may not have a CA PPM 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

OOTB Views to Use!

- Review Unfilled Allocations for your team/department.

PPM













Home Administration Favorites

Capacity Planning Overview

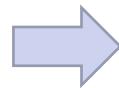
		Allocation			
OBS		Apr 18	May 18	Jun 18	Jul 18
All Groups	Hard-booked Staff	19.42	13.80	11.87	12.84
	Soft-booked Staff	197.09	189.84	178.30	163.29
	Unfilled Roles	362.99	347.80	334.77	331.41
	Capacity - Allocation	(330.50)	(302.24)	(275.74)	(258.55)
	Actuals				
Agile Teams	Capacity	8.00	8.00	8.00	8.00
	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				
	Capacity - Allocation	6.81	6.30	6.30	6.38
Business Transformation	Actuals				
	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 - Allocation				
	Actuals				
	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:

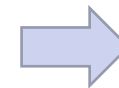
Capacity Planning Overview						
OBS▲				Apr 18	May 18	Jun 18
Agile Teams	  	Allocation		0.10	0.10	0.10
		Hard-booked Staff		1.09	1.60	1.60
		Soft-booked Staff				
		Unfilled Roles				
Business Transformation	  	Capacity - Allocation		6.81	6.30	6.30
		Actuals				
		Capacity		54.00	54.00	54.00
		Allocation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



Staff Allocation Overview					
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



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

Allocations by Project

Task Assignments!

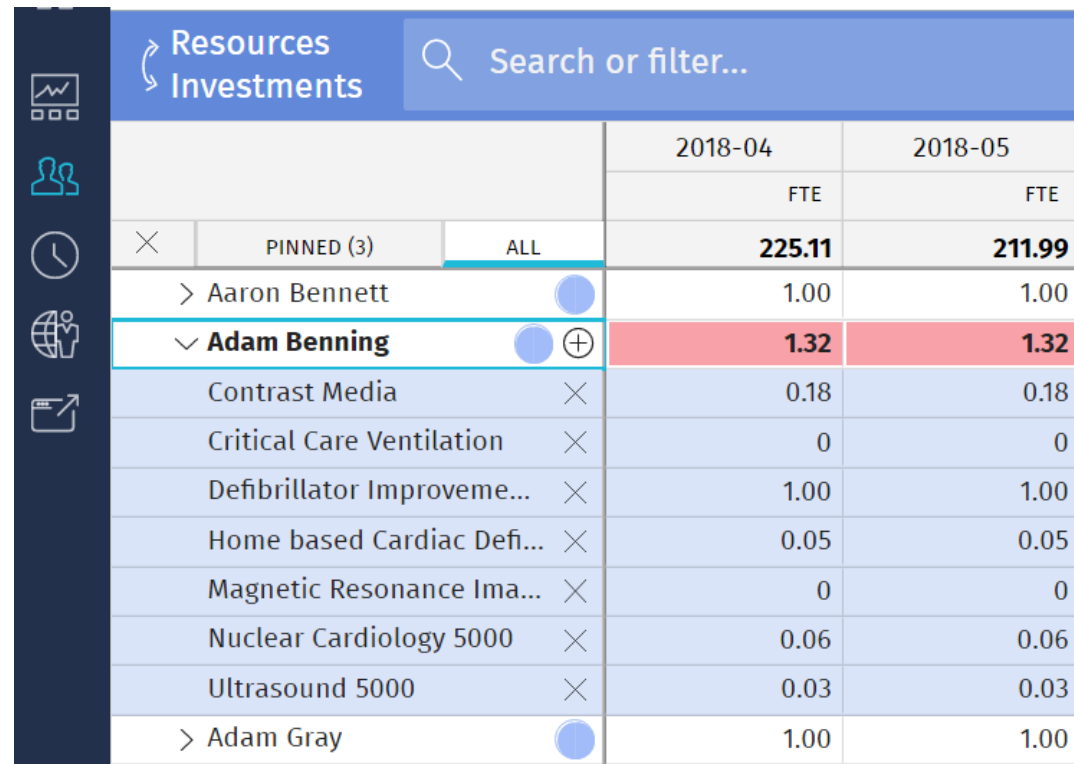
- All Task Assignments and Status in one Portlet:

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
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 CA PPM 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

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?



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 'Resource Finder' interface. On the left, there are input fields for 'Resource Name', 'Resource ID', 'OBS Unit', 'OBS Unit - Filter Mode' (set to 'Unit only'), 'Role' (set to '~Architect'), and 'Employment Type' (set to 'All'). On the right, there are filters for 'Availability' (with a threshold), 'Include Soft-booked Resources', 'Skills' (with a threshold), and 'Is Role' (set to 'No', highlighted with a red box). Below the filters are buttons for 'Filter', 'Show All', 'Save Filter', and 'Clear'. At the bottom, there is a table with columns: Resource, Resource ID, Primary Role, Employment Type, and Availability Match.

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 ▾												Allocation By Period				
			Resource/Role▲	Project Role	Booking Status	Start	Finish	Allocation	Actuals	ETC		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	7,259.4
			~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	3,500.0
			Dryden, Keith	~Project Manager	Soft	12/1/14	11/30/15	0.00	0.00	0.00	Allocation Aggregate Allocation Resource Availability	993.11	1,164.67	1,210.75	1,105.47	977.9
			~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	155.40	155.40	170.20	155.40	155.4
			~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	6,694.0
			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	929.00	881.80	718.20	660.4
												142.80	142.80	156.40	142.80	142.8

- 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

Agile Team Options Resource Management



- Create a role = agile team.
 - Each team is a unique role
 - Allows a team to be staffed to a common team while being recognized throughout the system.
 - The team (role) can have capacity of X hours per day (based on each member in the team having an availability of 8 hours each).
 - When you replace, you replace and add all of the people on the team so they can track time.
 - Allows you to plan by team on the portfolio.
- Use staff OBS to represent a given agile team, then pull all your reporting based on Staff OBS
- Create a new field on the resource record titled “team” (or something similar), then have each person populate the name of their team.
 - Update the applicable portlets to be able to filter/list results by the new Team attribute.
 - Add Team field to the team object/tab within a project or idea.
 - Pull all reporting based on this new attribute.

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?



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

Displaying 1 - 20 of 96



✖ = Required



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

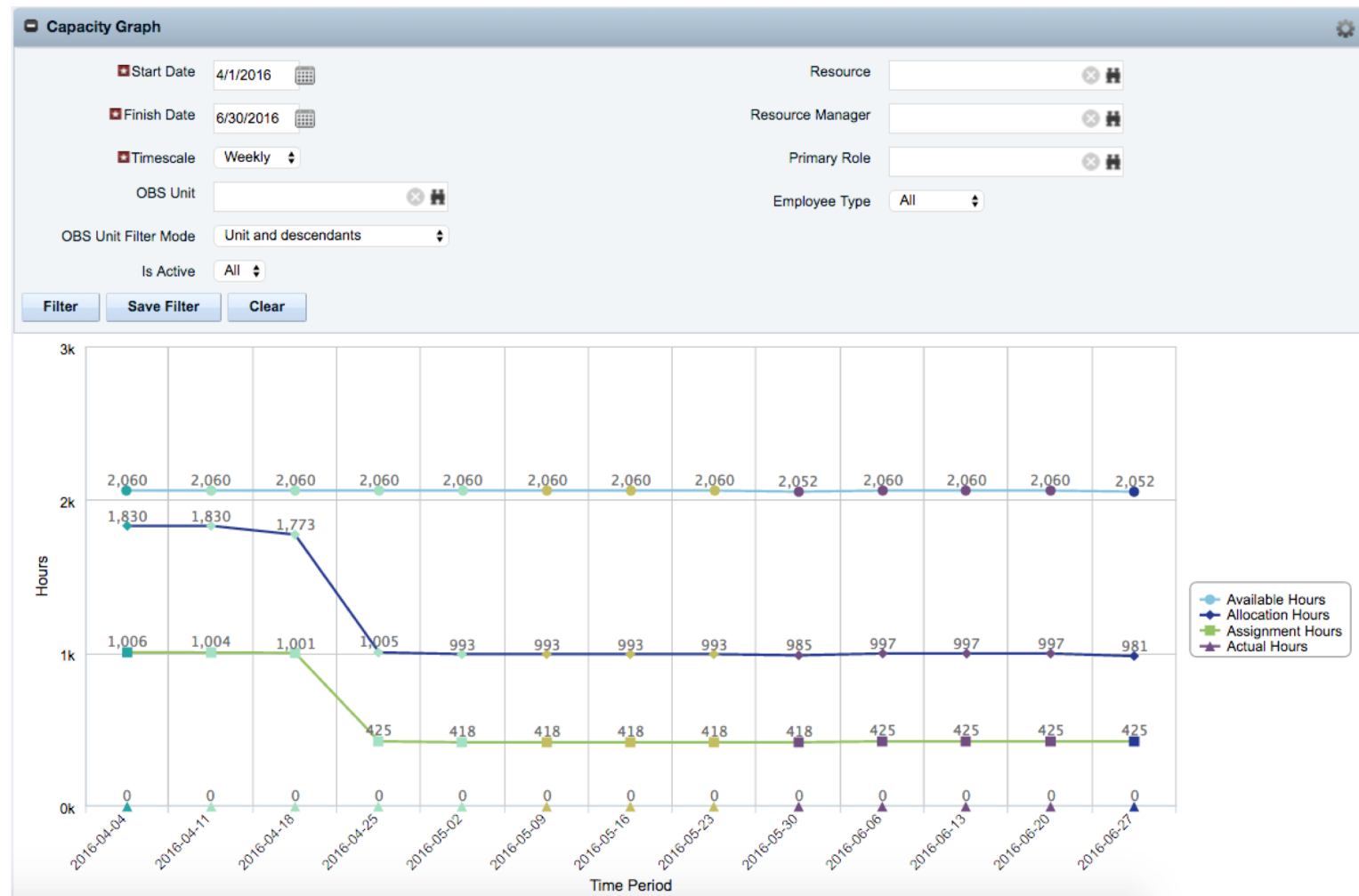
Filter Show All Save Filter Clear

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.



Questions?



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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.



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