Manage Schedules Externally with MSP/ OWB/ Smartsheet

Your Guides: Taunya Moore and Mindy Calderon

Agenda

- Introduction to Scheduling
  - Why use an External Scheduler and Who Uses What?
- Introduction to Microsoft Project Integration – Demo
- Rego vs. Out of the Box MSP Integration comparison
- Introduction to Smartsheet Integration– Demo
- Decision Factors, what scheduler to use?
- Options, Settings, & Views

Why Use a Scheduler?

Why use a Scheduler

- Most project managers are familiar with using a scheduler
- Full bidirectional connection between Clarity and Scheduler
- Stop relying on multiple spreadsheets and applications for data
- Real-time progress updates on project schedule when using timesheets
- Repeatable processes and centralized data are essential in providing accurate reports and actionable metrics

Why you Shouldn’t Use A Scheduling tool

A Scheduling tool’s job is to SCHEDULE your project plan EVERY TIME you export it!

- DO NOT USE IT JUST FOR EASY EDITING

- Rego has other easy to use options such as an excel based data editor

Pros and Cons with Using a Scheduler

Pros

✓ Extremely flexible

✓Able to create a complex WBS

✓Insight into your critical path

✓Sharable

Cons

✓Expensive (licenses)

✓Challenging to Train end users and to enforce common business methodology

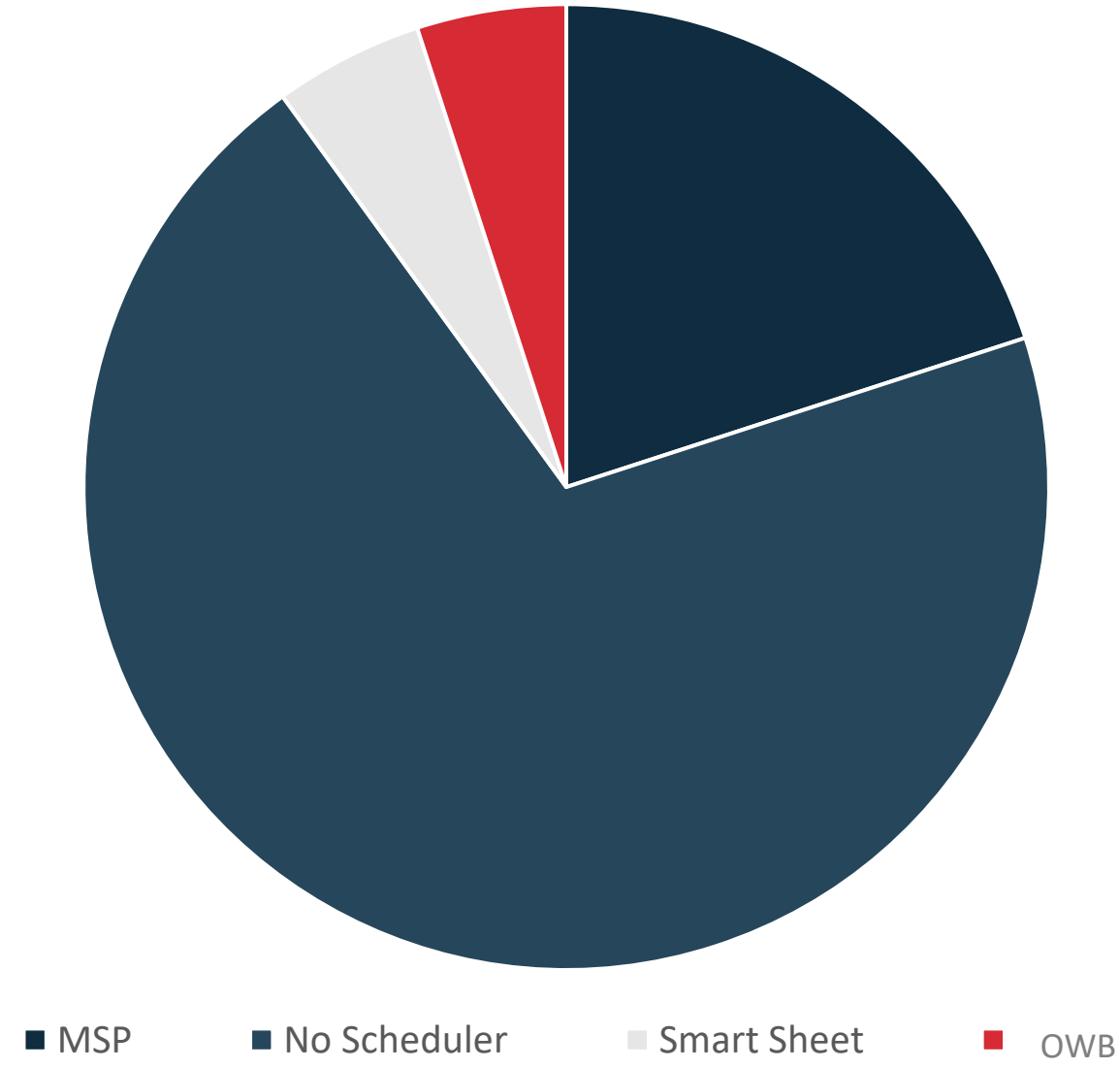
✓Can be hard to support end users (Scheduling issues/Errors)

✓Workstation Software – another tool to maintain

Typical Activities Done in a Scheduling tool

- Multiple Work Breakdown Structures Levels
- Task Dependencies
- Identify Critical Paths
- Key Tasks and Milestones
- Manage Project Baseline Settings
- Project Process Tracked by Actuals, ETC and Task Status
- Project Schedules can be Worked On or Off-Line
- Resource Assignments

Who Uses What



Clarity PPM Scheduling Options

1. Clarity PPM – Job or via Gantt on Project – Autoschedule
2. Microsoft Project 2013/2016/2019/O365
3. Open Workbench (OWB)
4. SmartSheet

- Organizations should select ONE Clarity PPM scheduling option or at the very least, ONE scheduling option per project.

- Each option uses a different scheduling algorithm, so if a project schedule is opened in one and then another, it will calculate on top of a calculation.

Microsoft Project

Microsoft Project will update the project schedule based on task duration.

1. Algorithm is date driven
2. Custom fields need to be mapped through the Clarity PPM User Interface
3. MSP license required for each user
4. Additional Clarity / MSP training may be necessary

Demo MSP

Let Rego be your guide.

MSP OOTB or Rego Connector?

Let Rego be your guide.

MSP OOTB vs Rego Connector

Feature	OOTB	Rego
Schedule Connect & Add-in install Application required	✔	
Server Side Data Processing/Validation—Light client		✔
Support for Click-to-Run, O365, Project 2016, Project 2019	✔*	✔
Enhanced Error and Validation Client Messages		✔
Bi-Directional sync of project/task/assignments	✔	✔
Mapping of custom fields and Static lookups	✔	✔
Support of dynamic lookups		✔
Support of Mapped Field Labels to MSP		✔
Resource Calendar Management in MSP		✔
Ability to Save As a New project to Clarity	✔	
Baseline Support	✔	✔
Master/Subproject Support	✔	
Partial project import to Clarity		✔
Interproject Dependency Support	✔	✔
Resource Rates Support	✔*	✔

Free 30 Trial Offer

- Rego is offering a free 30-ish day trial. Try out the connector in a non-production environment

- Reach out to Taunya Moore taunya.moore@regoconsulting.com or your account manager to get started

Open Workbench

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Open Workbench

Open Workbench will update the project schedule based on the number of hours each resource will work per week to cover the total number of hours on the task.

1. Algorithm is same as Clarity PPM

2. Fully integrated with Clarity PPM

3. Training may be required

SmartSheet

Smartsheet will update the project schedule based on task duration.

1. Algorithm is date driven

2. Use the power of all of Smartsheets' features and only sync back the data you need

3. Map Risk and/or Issue logs from Smartsheet back into Clarity

4. Can export schedules as MSP files

Demo Smartsheet

Let Rego be your guide.

Decision Factors OWB vs. MSP vs. Smartsheet?

- If MSP is widely used and accepted within the organization
- If project plans need to be externally communicated via MSP
- If project assignments are task driven

Microsoft Office Project

smartsheet

- If Smartsheet already exists within the PM organization
- If there is a desire for a flexible, lightweight scheduling tool
- If project assignments are task driven

- If there's minimal MSP experience in the organization
- If project plans do NOT need to be externally communicated via MSP
- If project assignments are effort driven

OPEN WORKBENCH

No Matter the Tool, Set Your Project Settings!

- Each Organization should have the Project Settings identically set on each workstation.
  - It is difficult to troubleshoot an issue if the settings are different on every workstation
  - Users should be playing on the same field—not doing their own thing
- Use established best practice guidelines for project settings for each tool
- Explain to your Project Managers what each option does so they understand how it affects their project schedule

Questions?

Let Rego be your guide.

Appendix

Let Rego be your guide.

Options, Settings, & Scheduling modes

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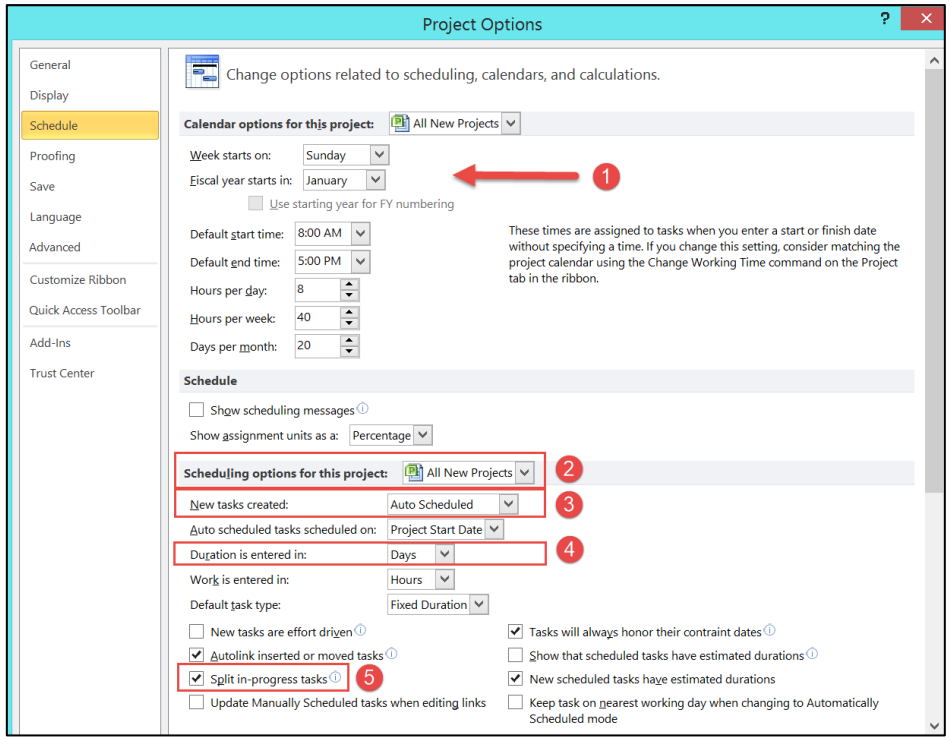
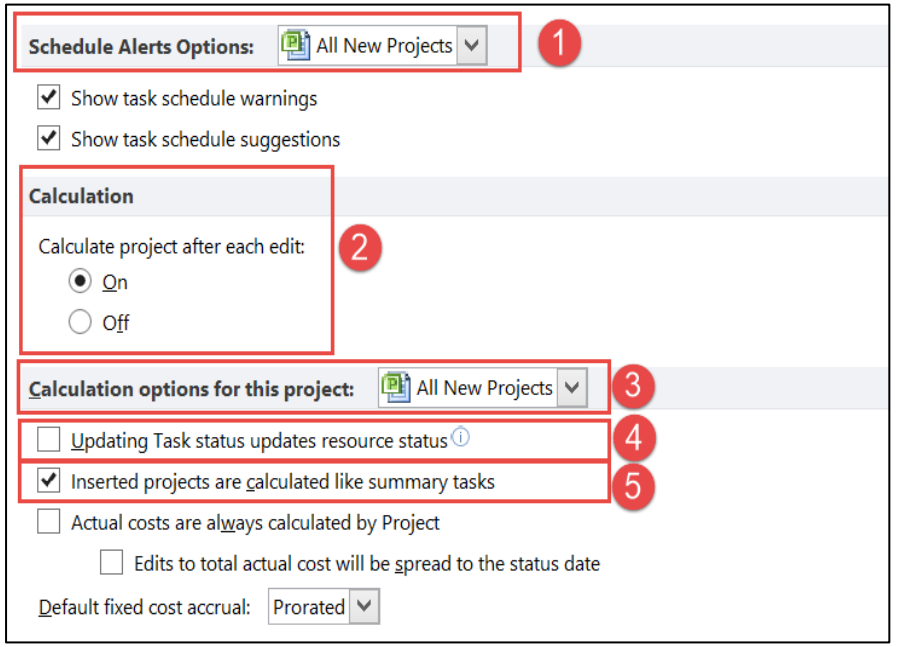
MSP Options – Schedule Tab

1. **Calendar Options:** The “Week starts on” and “Fiscal year starts in” calendar fields should match your calendar settings in Clarity. The other MSP calendar fields will map through the integration
2. **Scheduling Options for this Project**: This should be set to “All New Projects” in order for the settings to be effective for all new projects and not just the one that is open
3. **New Tasks Created**: Automatic calculation is the preferred setting, but it is not required. If you select Manual Calculation, you must manually calculate the project before saving it to Clarity (more info on next slide)
4. **Duration is entered in:** Duration should be tracked in days since this is the lowest level that Clarity is able to track
5. **Split in-progress Tasks:** Helps fill in the work gaps while using Resource Leveling



MSP Options – Schedule Tab (Con't)

1. **Schedule Alerts Options**: This should be set to "All New Projects" in order for the settings to be effective for all new projects and not just the one that is open.
2. **Calculate Project after each Edit:** If "On" is selected, the project will automatically calculate after each edit. If set to "Off", task scheduling that occurs as a result of task dependencies (predecessors) will be turned off within MSP as well as when a project schedule is re-opened from Clarity to MSP (more info on next slides).
3. **Calculation Options for this Project**: This should be set to "All New Projects" in order for the settings to be effective for all new projects and not just the one that is open.
4. **Updating Task status updates Resource Status:** If checked, resource actuals, remaining work (ETC), and costs are automatically updated when percent complete, actual duration, or remaining duration is updated. This open should ONLY be checked when Actual hours are NOT being tracked through Clarity timesheets. (more info on next slides).
5. **Inserted Projects are calculated like Summary Tasks**: If checked, on a master project, project will display a single critical path for the Master Project and all of its sub-projects.



MSP Updating Task Status Updates Resource Status

If the Clarity **Track Mode** is set to **“Clarity”** or **“Clarity”**, this option should be UNCHECKED in MSP > File > Options > Schedule:

The “Updating Task status updates resource status” feature in MSP automatically updates the status of projects when the “% Complete” field is updated

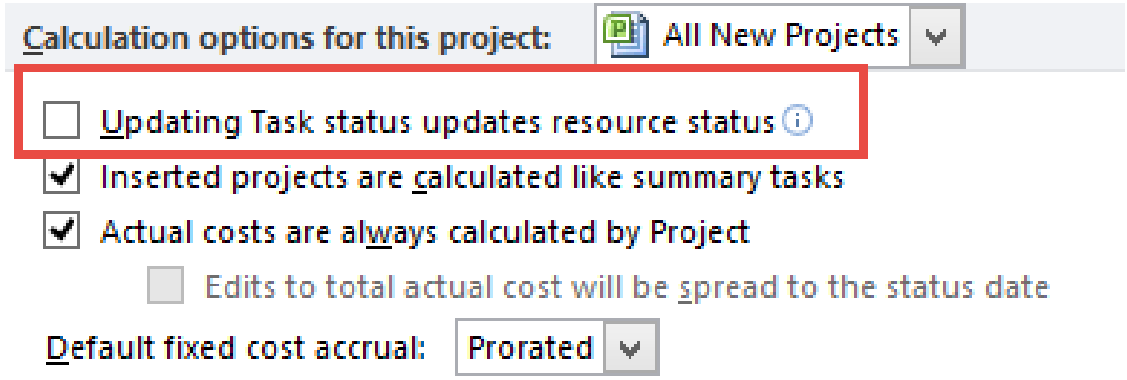
For Example:

If 25% is entered as the “% Complete” on a 40 hour task, MSP will automatically update Actuals with 10 hours and change Remaining Work to 30 hours

When the project schedule is saved back to Clarity, those Actuals will get dropped (not saved to Clarity) without an error message, so the PM will be unaware

When the schedule is re-opened from Clarity to MSP, the following may happen:

- Actual Hours disappeared
- The Remaining Work field shows the reduced value, and therefore Work will be reduced
- Task Dates may be rescheduled



MSP: A Word About Calculation Mode Mode: Off

❖DON'T USE IT!

- Even with it set to off (manually scheduled) there are scenarios where MSP WILL schedule your plan:
  - Clarity Timesheet Actuals can shift Task Dates
  - Resource Leveling will still recalculate the project schedule
  - Task Constraints may shift Task Dates
  - Dependencies will further change your schedule

❖Instead Do This!

✓ Educate your users on how Microsoft Schedules your project plans (Rego can help!)

✓Create Job Aids for common scheduling scenarios.

- Clarity PPM Documentation has LOTS of information on scheduling, use this information to create your job aids.

https://docops.ca.com/ca-ppm/15-6/en/using/getting-started-with-classic-ppm/project-management/msp-manage-projects-with-microsoft-project/msp-synchronize-microsoft-project-with-ca-clarity-ppm

Managing Your Views

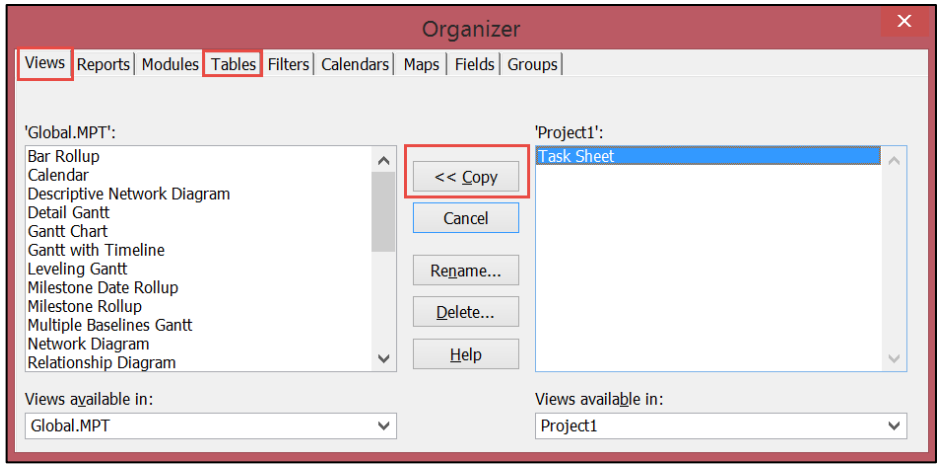
Let Rego be your guide.

MSP Organizer

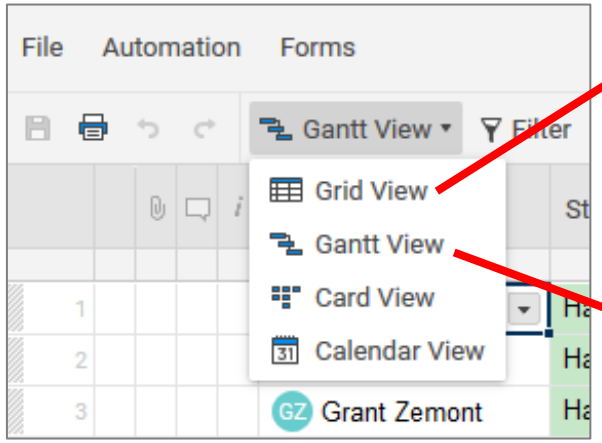
- When customizing views in MSP by rearranging columns or adding and removing fields, the changes are only visible in the project you're currently working on
- You can copy your customization to the Global Template so all the changes are available in future projects, as well as projects that were created in the past
- To create a global template, open an empty project or the project that has the customization directly from MSP, go to File > Info > Organizer
- Global templates are useful to share so that all users are working in the same view (and easier to support!)

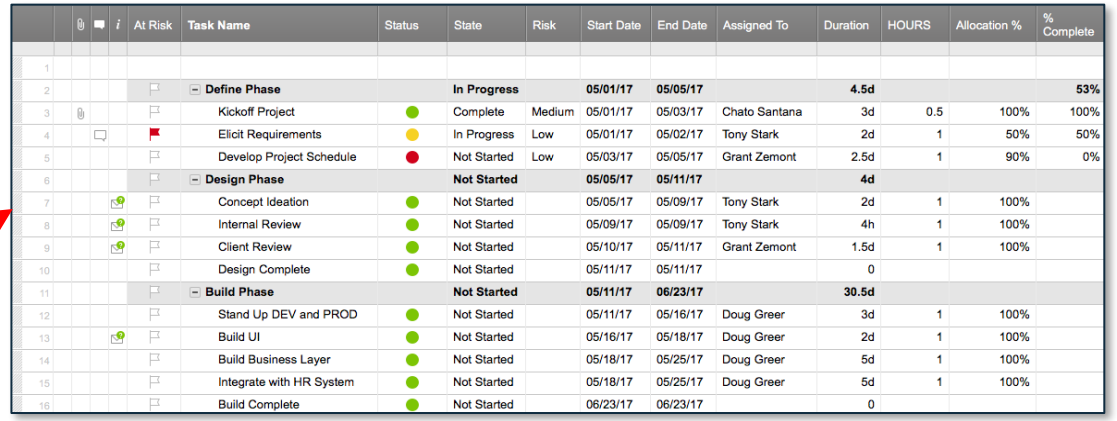
MSP Organizer

- Once the changes are made, you can see the active project's customizations on the right-side panel of the Organizer
  - From the "Views" tab, highlight all of the views from the right-side panel and then click "<<Copy"
  - Do the same for the "Tables" tab



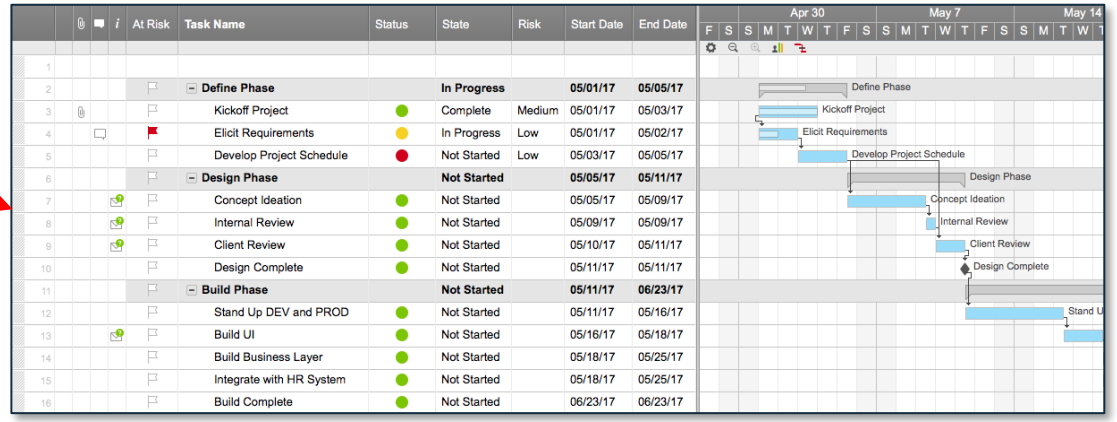
Smartsheet Views (1)





	At Risk	Task Name	Status	State	Risk	Start Date	End Date	Assigned To	Duration	HOURS	Allocation %	% Complete
1												
2		**Define Phase**		**In Progress**		**05/01/17**	**05/05/17**		**4.5d**			**53%**
3		Kickoff Project		Complete	Medium	05/01/17	05/03/17	Chato Santana	3d	0.5	100%	100%
4		Elicit Requirements		In Progress	Low	05/01/17	05/02/17	Tony Stark	2d	1	50%	50%
5		Develop Project Schedule		Not Started	Low	05/03/17	05/05/17	Grant Zemont	2.5d	1	90%	0%
6		**Design Phase**		**Not Started**		**05/05/17**	**05/11/17**		**4d**			
7		Concept Ideation		Not Started		05/05/17	05/09/17	Tony Stark	2d	1	100%	
8		Internal Review		Not Started		05/09/17	05/09/17	Tony Stark	4h	1	100%	
9		Client Review		Not Started		05/10/17	05/11/17	Grant Zemont	1.5d	1	100%	
10		Design Complete		Not Started		05/11/17	05/11/17		0			
11		**Build Phase**		**Not Started**		**05/11/17**	**06/23/17**		**30.5d**			
12		Stand Up DEV and PROD		Not Started		05/11/17	05/16/17	Doug Greer	3d	1	100%	
13		Build UI		Not Started		05/16/17	05/18/17	Doug Greer	2d	1	100%	
14		Build Business Layer		Not Started		05/18/17	05/25/17	Doug Greer	5d	1	100%	
15		Integrate with HR System		Not Started		05/18/17	05/25/17	Doug Greer	5d	1	100%	
16		Build Complete		Not Started		06/23/17	06/23/17		0			

Grid View



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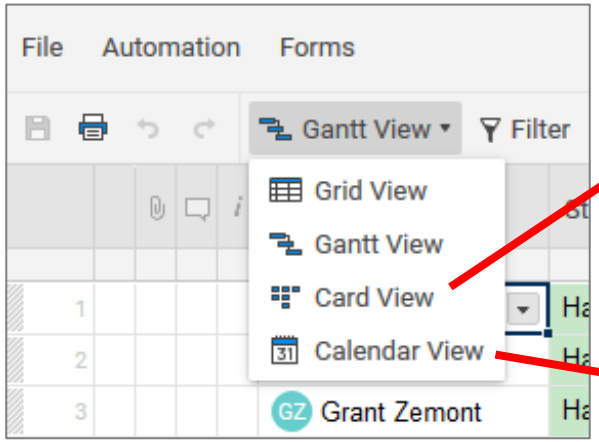
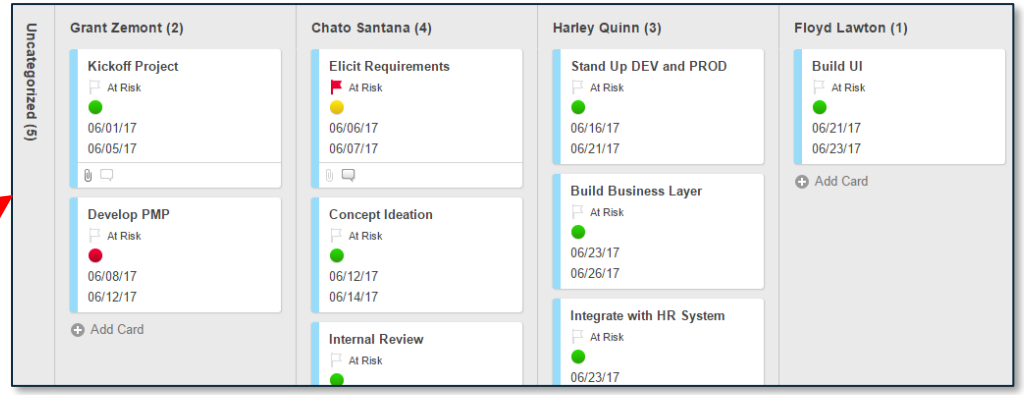
5		Develop Project Schedule		Not Started	Low	05/03/17	05/05/17
6		**Design Phase**		**Not Started**		**05/05/17**	**05/11/17**
7		Concept Ideation		Not Started		05/05/17	05/09/17
8		Internal Review		Not Started		05/09/17	05/09/17
9		Client Review		Not Started		05/10/17	05/11/17
10		Design Complete		Not Started		05/11/17	05/11/17
11		**Build Phase**		**Not Started**		**05/11/17**	**06/23/17**
12		Stand Up DEV and PROD		Not Started		05/11/17	05/16/17
13		Build UI		Not Started		05/16/17	05/18/17
14		Build Business Layer		Not Started		05/18/17	05/25/17
15		Integrate with HR System		Not Started		05/18/17	05/25/17
16		Build Complete		Not Started		06/23/17	06/23/17

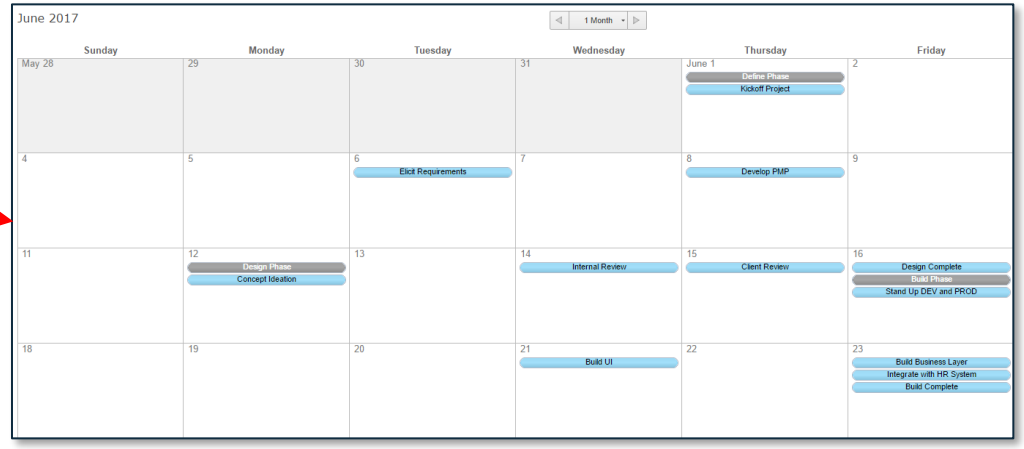
Gantt View

Smartsheet Views (2)





Card View



Calendar View

Smartsheet Supporting Material

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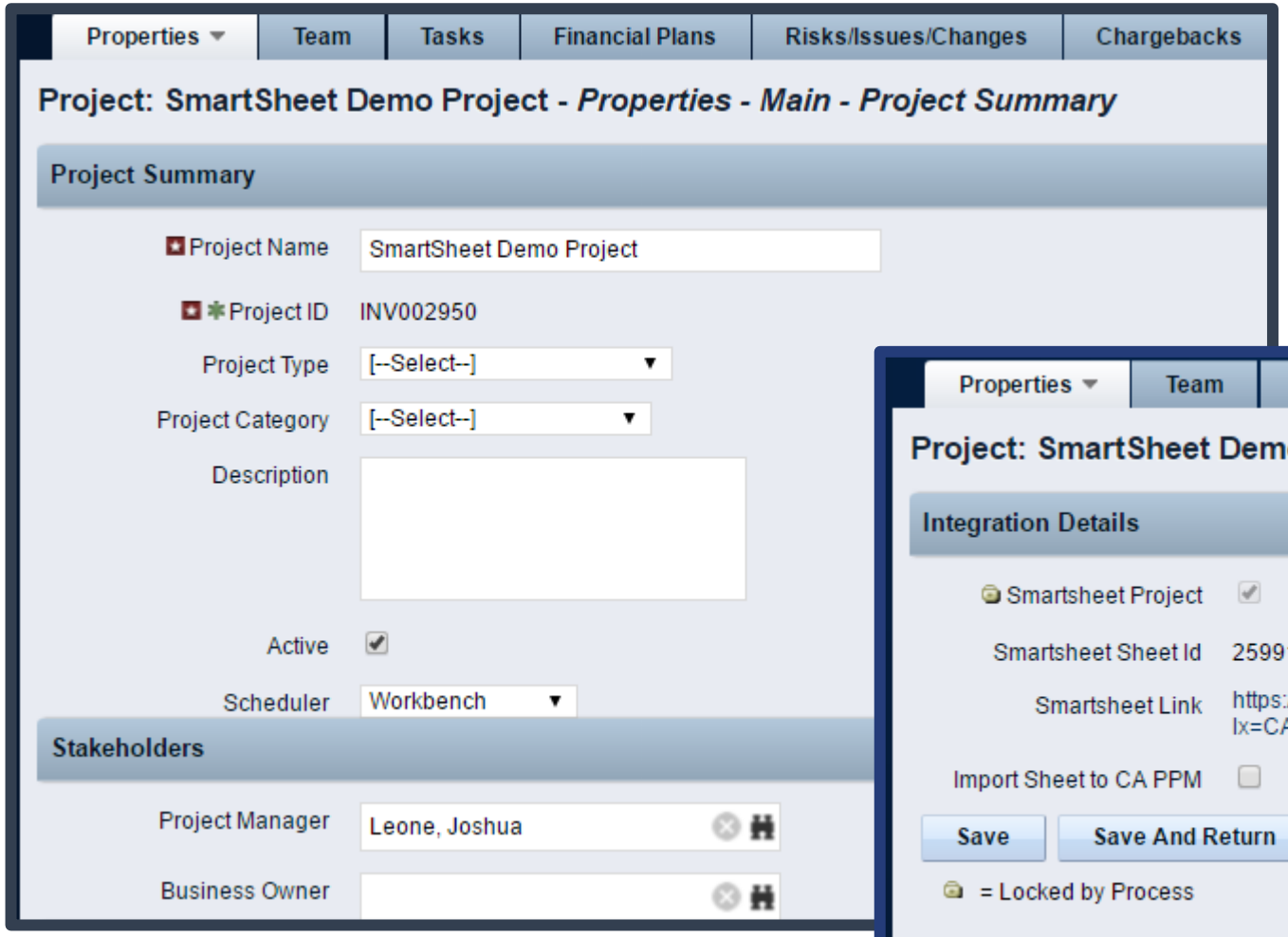
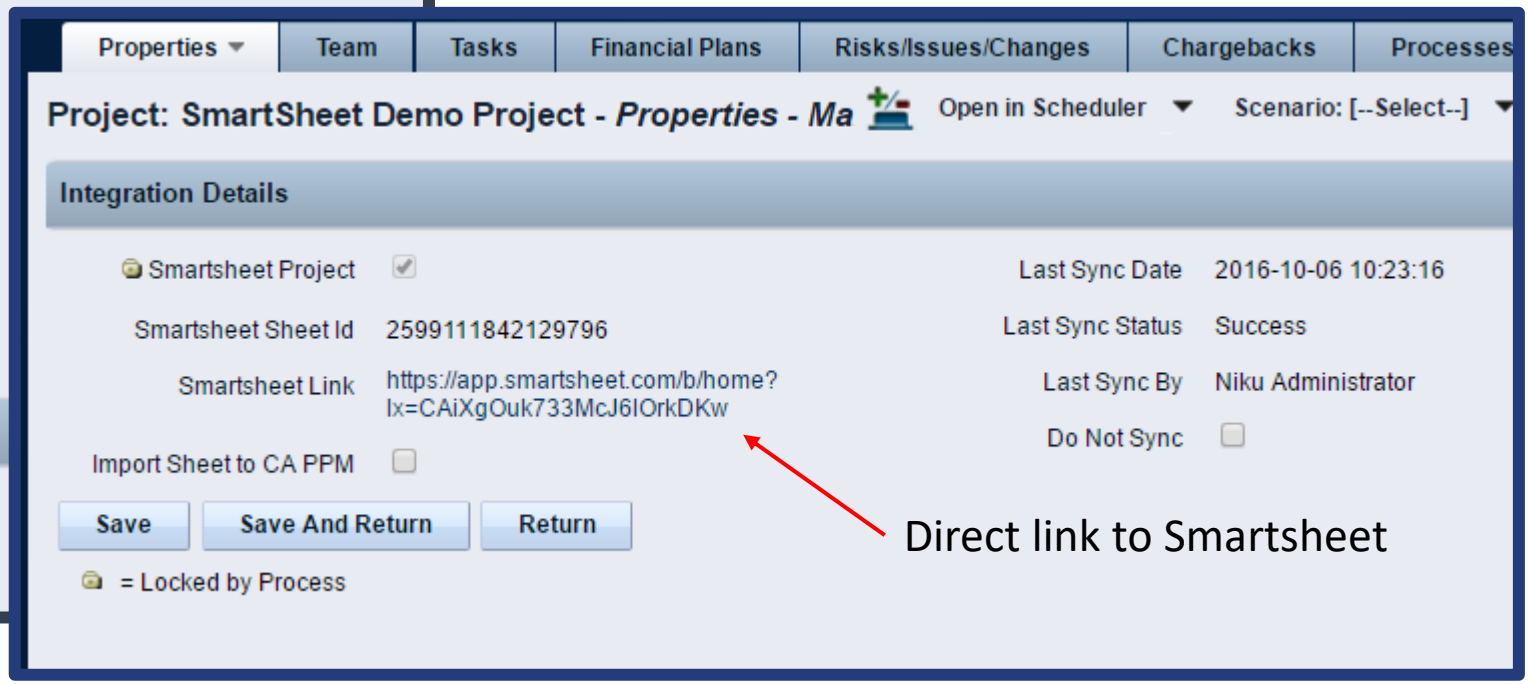
Let Rego be your guide.

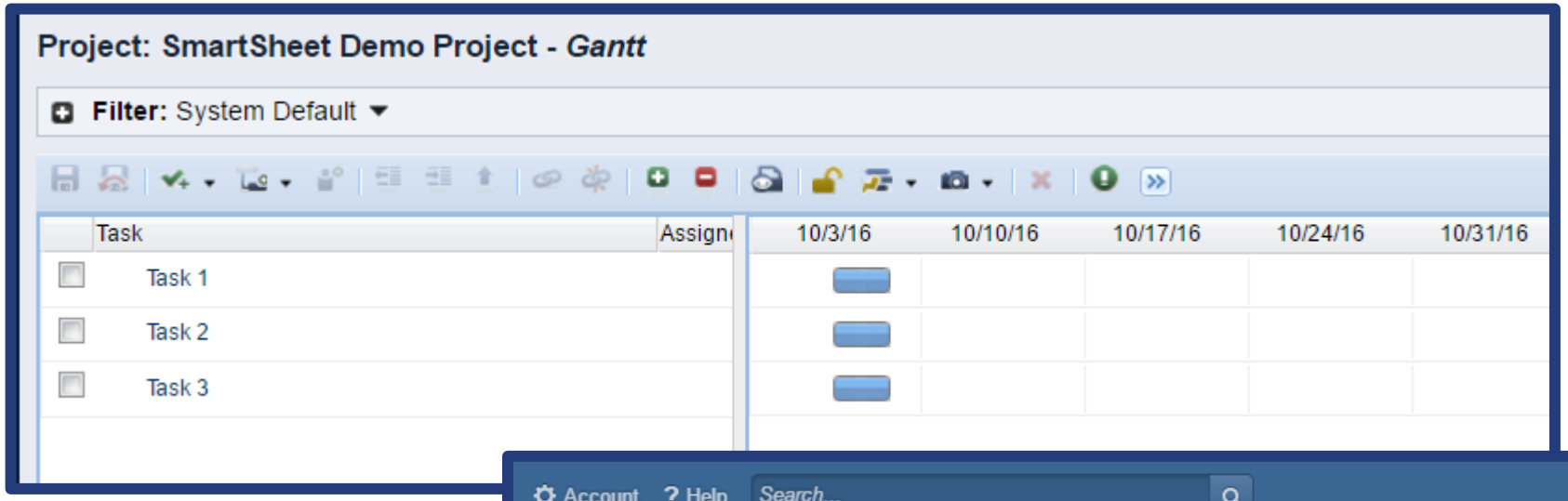
Smartsheet: Project Initiation

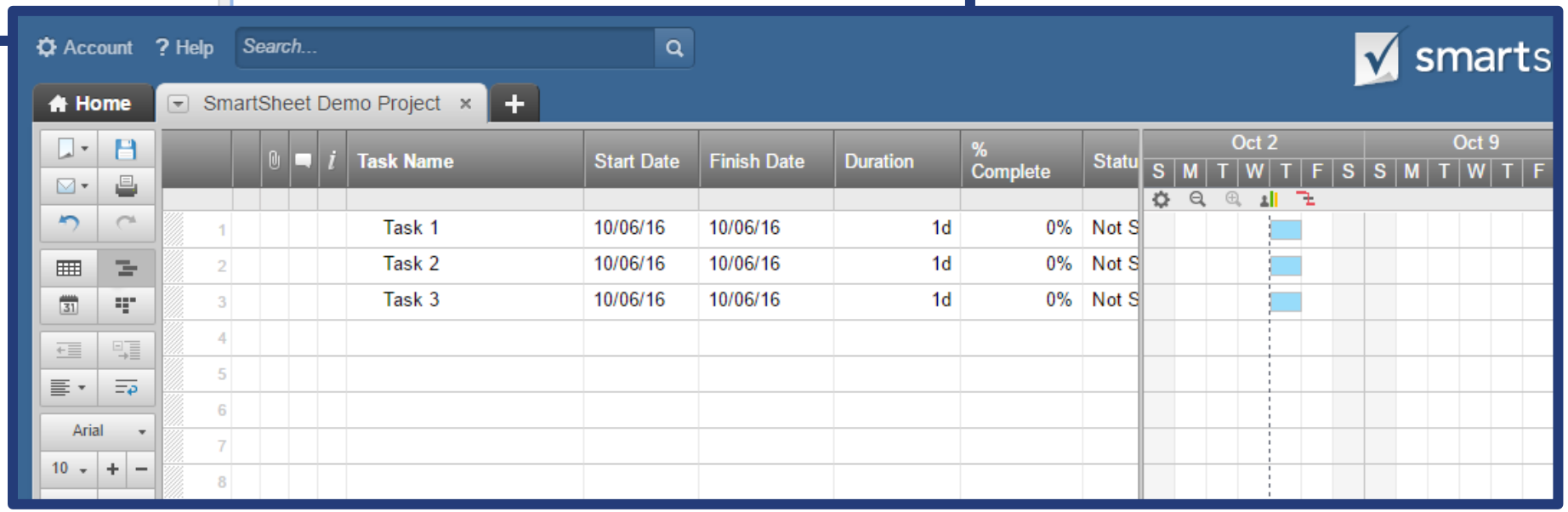




- ✓ Start a project in Clarity.
- ✓ Set the project to be a Smartsheet Project.
- ✓ The project is created in Smartsheet in real time,
- ✓ importing all tasks that were setup in Clarity.

Tasks in Smartsheet





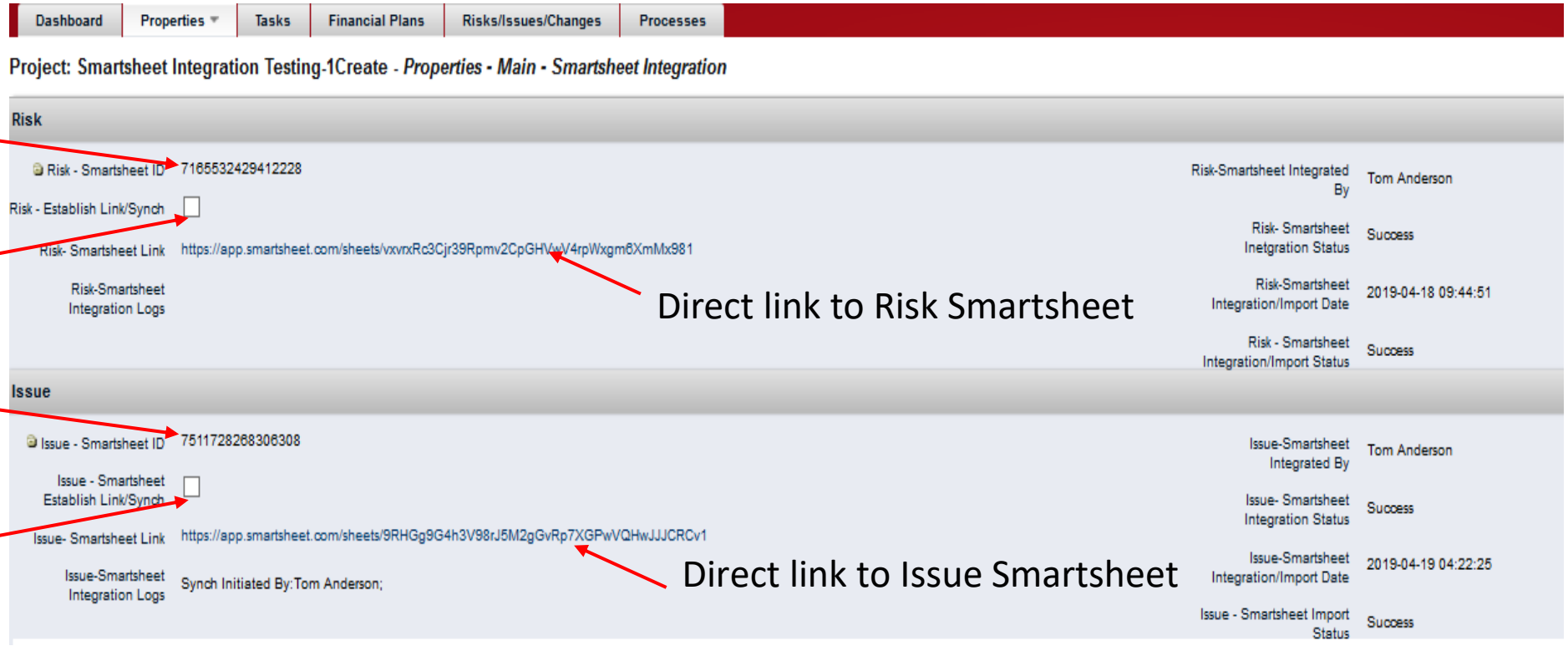
This project was initiated with 3 tasks.

All tasks were imported to the sheet on creation.

Link Risk and Issues Sheets To Projects

Enter Risk-Smartsheet ID, Check Establish Link/Synch checkbox and click on save. Process will read Risks from Sheet and create in Clarity

Enter Issue-Smartsheet ID, Check Establish Link/Synch checkbox and click on save. Process will read Risks from Sheet and create in Clarity



Risks and Issues in Smartsheet

File | Alerts & Actions | Forms

MK Risk Sample

Grid View | Filter | Arial | 10

	ID#	Description	Risk/Issue Type	Status	Owner	Target Resolution Date	Probability	Impact	Risk Response	Show In Report	Mitigation Steps/Resolution	Comments
1	Risk234	Risk234	Human Interface	Open		04/19/19	Low	Low	Accept		Migration Steps	Comments
2												

Dashboard | Properties | Tasks | Financial Plans | Risks/Issues/Changes | Processes

Project: Smartsheet Integration Testing-1Create - *Risks/Issues/Changes - Risks*

Filter: System Default

Risk	Category	Priority	Probability	Impact	Calculated Risk	Above Threshold	Status	Owner	Target Resolution Date
Risk234	Human Interface	◆	◆	◆	◆	✓	Open	Administrator, PPM	4/19/19

Save | New | Delete