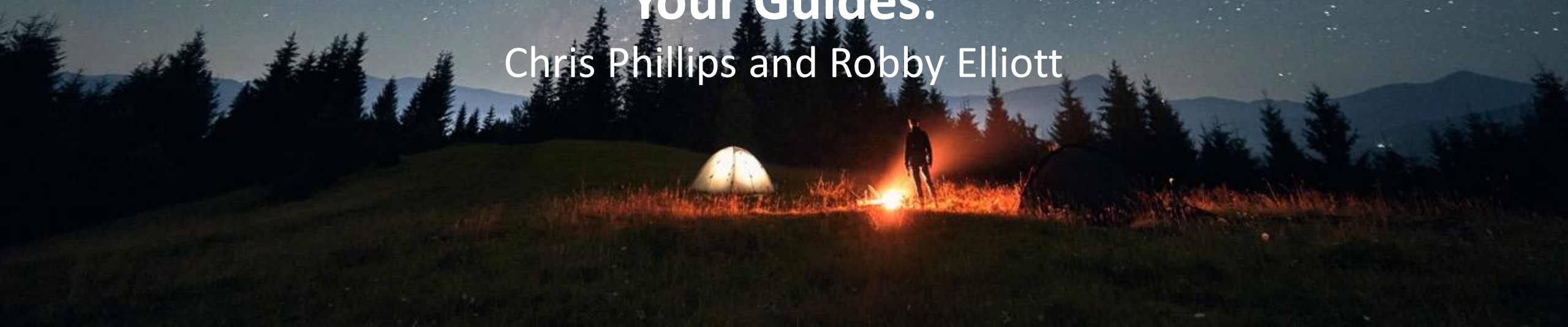




# Resource Management | OOTB Introduction

**Your Guides:**

Chris Phillips and Robby Elliott



# Introductions

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



# Agenda

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- Introduction
- Resource Management Overview
- Resource Access/Properties
- Resource & Role Allocation
- Resource Views
- Resource Management in the Modern UX

# Introduction

Discuss Rego Base Configuration



Let Rego be your guide.

# 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.



# Resource Management Overview

Accessing Resources

Resource Properties



Let Rego be your guide.

# Resource Management Definition

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

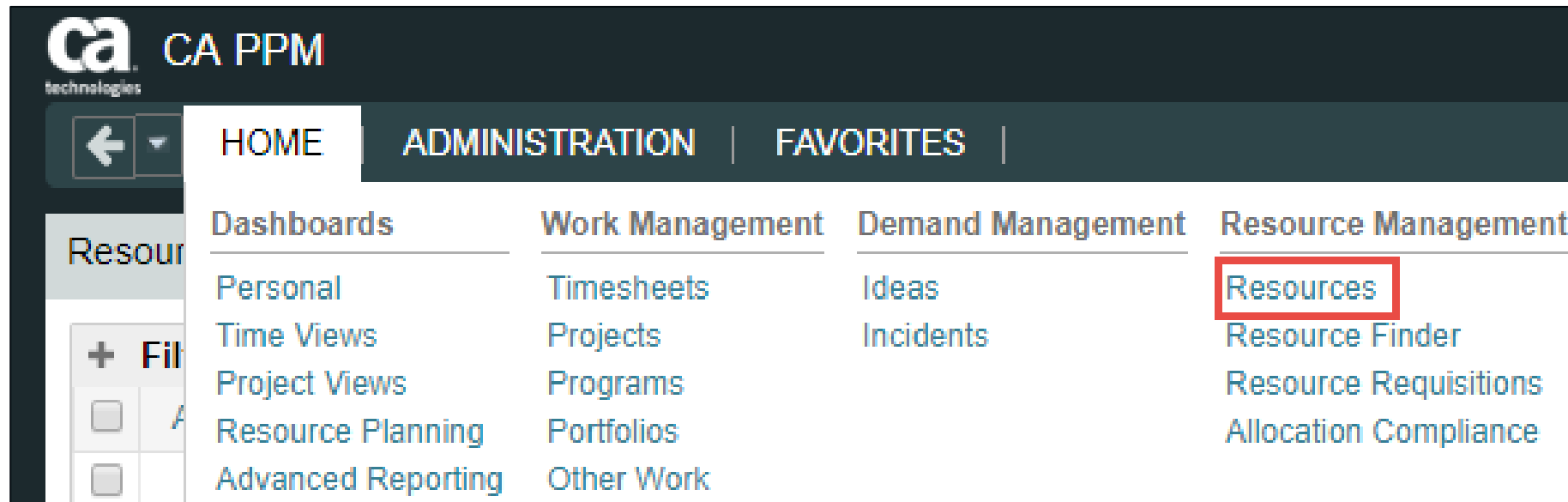
# Resource Access / Properties



Let Rego be your guide.

# Access Resources

- To access resources, hover over Home, then click Resources under Resource Management.
- You can only access resources in the Classic UX.
- Note that navigation bar links and section headers may be different depending on how your Clarity 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 Clarity for items meeting specific criteria
  - The bottom portion of the screen is the list that displays the results of your filter criteria

The screenshot shows the 'Resource List' interface. A red box highlights the minus sign icon next to 'Filter: System Default', with a callout 'Shows/Hides the filter'. A blue box points to the 'Filter' button. Another blue box points to the 'Resource/Role ID' column header with the text 'Click a heading to sort by that value'. A dark blue box on the right says 'Base Configuration – Resource Security Groups'. A blue box points to the table with the text 'Filter results display here'.

**Filter Section:**

- Filter: System Default
- Resource/Role Name
- Resource/Role ID
- OBS Unit
- OBS Unit - Filter Mode: Unit only
- Resource Manager
- Primary Role: All
- Filter button
- Resource Type: All
- Employment Type: All
- Active: Yes
- Is Role: All
- Power Filter: [Build Power Filter]

**Filter Results Table:**

Active	Resource/Role	Resource/Role ID	Email Address	Employment Type	Primary Role	Resource Manager
<input checked="" type="checkbox"/>	Admin, PMO	csk.admin	admin@mailserver.com	Employee		
<input checked="" type="checkbox"/>	Administrator, clarity	ppmjasperadmin	username@mailserver.com	Employee		CA On Demand, Administrator
<input checked="" type="checkbox"/>	Administrator, PPM	admin	support@regoconsulting.com	Employee		Administrator, PPM

# Resource Security

- Access to the resource is controlled via Clarity 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

The screenshot shows the 'Project: Project Planning Software Training - Properties - Main - General' form. The form is divided into several sections: General, Description, Schedule, and Status. The General section contains fields for Project Name, Project ID, Project Type, Status, Charge Code, Progress, Project Manager, Stage, Goal, and Priority. The Description section has a text area for the Description. The Schedule section has fields for Start Date, Finish Date, Baseline Start, and Baseline Finish. The Status section has a Status Indicator and a Status Comment text area. At the bottom, there are buttons for Save, Save And Return, and Return.

Section	Field	Value
General	Project Name	Project Planning Software Training
	Project ID	PR000020
	Project Type	Major Project
	Status	Unapproved
	Charge Code	[--Select--]
	Progress	Not Started
	Project Manager	McGuire, Noreen
	Stage	Initiation
	Priority	30
Description	Description	
Schedule	Start Date	1/29/2018
	Finish Date	5/14/2018
	Baseline Start	
	Baseline Finish	
Status	Status Indicator	On Track
	Status Comment	

# 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

Resource List



— Filter: System Default ▾

Resource/Role Name

Resource/Role ID

OBS Unit   

OBS Unit - Filter Mode

Resource Manager   

Primary Role

Resource Type








Employment Type

Active

Is Role

Power Filter

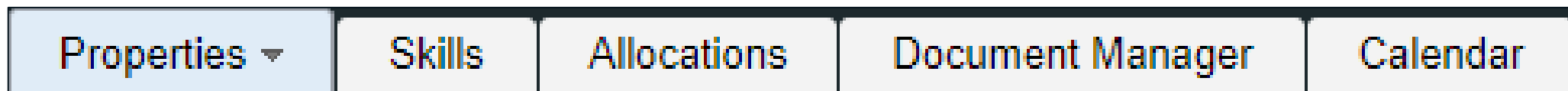
**Base Configuration – Resource Filter section is simplified**

<input type="checkbox"/>	Active	Resource/Role ▲		Resource/Role ID	Email Address	Employment Type	Primary Role	Resource Manager
<input type="checkbox"/>	✓	Admin, PMO		csk.admin	admin@mailserver.com	Employee		
<input type="checkbox"/>	✓	Administrator, clarity		ppmjasperadmin	username@mailserver.com	Employee		CA On Demand, Administrator
<input type="checkbox"/>	✓	Administrator, PPM		admin	support@regoconsulting.com	Employee		Administrator, PPM
<input type="checkbox"/>	✓	Administrator, XC		xc_admin	xc_admin@mailserver.com	Employee		Administrator, PPM
<input type="checkbox"/>	✓	Architect		csk.architect				
<input type="checkbox"/>	✓	<b>Bolin, Rod</b>		rbolin	claritydev@regoconsulting.com_DNU	Employee		Joshi, Navdeep



# The Resource Profile

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

The screenshot shows the 'Resource Properties' form in the Rego University 2021 system. The form is organized into sections: Main, Financial, and Contact Information. The Main section includes fields for Last Name (Bolin), First Name (Rod), Resource ID (rbolin), and Email Address (claritydev@regoconsulting.com\_DNU). The Financial section includes Booking Manager (Garvey, Sara), Resource Manager (Joshi, Navdeep), Primary Role (Project Manager), Employment Type (Employee), and Availability (8.00). The Contact Information section includes Organizational Breakdown Structures (Department OBS). The form has tabs for Properties, Skills, Allocations, Document Manager, and Calendar. A legend at the bottom indicates that a red asterisk (\*) means Required and a green asterisk (\*) means Unique.

# Resource Properties

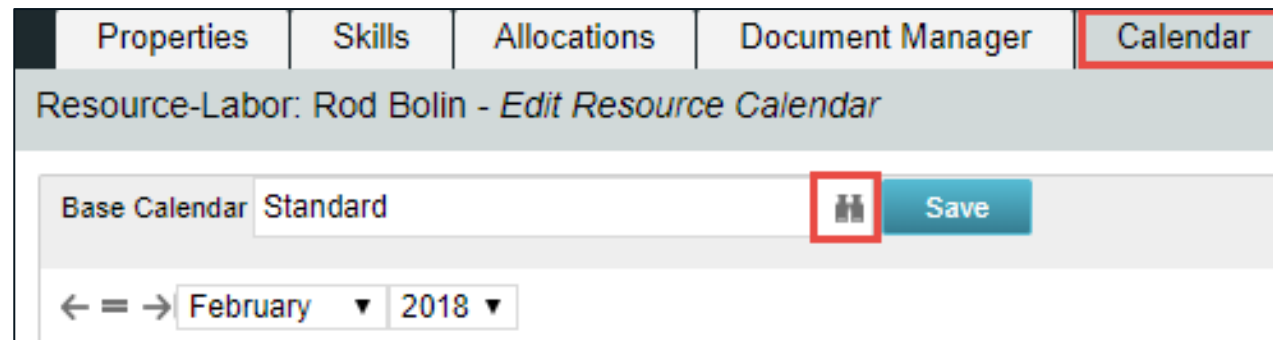
- Admin Subpage
  - Security restricted
  - Defaults set
  - Input Type code setup

Properties ▾	Skills	Allocations	Document Mana
Main	Properties	Access to this Resource	
Financial	General	Full View	
Contact Information	Admin	Resource Group	

Properties ▾	Skills	Allocations	Document Manager	Calendar
Resource-Labor: Rod Bolin - Main - Admin				
Admin				
Date of Hire	12/1/2014	Active		<input checked="" type="checkbox"/>
Date of Termination		External		<input type="checkbox"/>
Input Type Code	Regular ▾	Open for Time Entry		<input checked="" type="checkbox"/>
Track Mode	PPM ▾	Include in Datamart		<input checked="" type="checkbox"/>
<div> <div>Save</div> <div>Save And Return</div> <div>Return</div> </div>				

# 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



The screenshot shows a web application interface for editing a resource's calendar. At the top, there are five tabs: 'Properties', 'Skills', 'Allocations', 'Document Manager', and 'Calendar'. The 'Calendar' tab is selected and highlighted with a red border. Below the tabs, the page title is 'Resource-Labor: Rod Bolin - Edit Resource Calendar'. The main content area has a 'Base Calendar' dropdown menu set to 'Standard', followed by a calendar icon button (also highlighted with a red border) and a 'Save' button. At the bottom, there is a navigation bar with left, right, and equals arrows, a dropdown for 'February', and a dropdown for '2018'.

- Base calendars and calendars for each country/region
- Calendar sets the capacity of the resource

# Resource and Role Allocation

Allocating a Resource  
Update Resource Allocation



Let Rego be your guide.

# 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
- Allocation can be done in either the Classic or New UX.
- 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)
- Mixed booking is not supported in the New UX, until version 15.7.
  - If Mixed booking is enabled in 15.7, the Staffing Views do not work.

# Allocating a Resource in the Modern UX – From the Project



Let Rego be your guide.

# Allocating a Resource to a Project – via Project

- Navigate to the *Staff* tab within a project.
- Click the “+” icon, then select the resource.

Clarity PPM A fantastic Project  
P00000047

DETAILS STAFF TASK LIST TASKS ASSIGNMENTS RISKS ISSUES

Group By

Resource ↑	Role	*Booking S...	Open For Ti...	Start	Fin...
Administrator...		Soft	✓		
DBA	DBA	Soft	✓		
Network Engi...	Network Engi...	Soft	✓		
Project Mana...	Project Mana...	Soft	✓		
Storage Archi...	Storage Archi...	Soft	✓		

+ \*Resource ↑ Role \*Booking S...

sara ✕

Garvey, Sara (sgarvey)

DBA DBA Soft

Network Engi... Network Engi... Soft

Project Mana... Project Mana... Soft

200

188

# Update Allocation Default %

- Update allocation details in the *Default Allocation %* column.

*Resource↑	Role	*Booking S...	Default All...	Open For Ti...	Start
Administrator...		Soft	100%	✓	
DBA	DBA	Soft	100%	✓	
Garvey, Sara	Project Mana...	Soft	50	✓	
Network Engi...	Network Engi...	Soft	100%	✓	
Project Mana...	Project Mana...	Soft	100%	✓	
Storage Archi...	Storage Archi...	Soft	100%	✓	

# Update Resource Allocation by Period

- Update the time-period based allocations if necessary.

The screenshot displays the Rego software interface. On the left, a sidebar contains several sections: 'MONEY DECIMAL DISPLAY' with radio buttons for 0.00, 0.0, and 0 (selected); 'NUMBER DECIMAL DISPLAY' with similar radio buttons; 'PER-PERIOD METRICS' with a dropdown set to 'Allocations'; 'PERIODS' with a dropdown set to 'Weeks'; 'START PERIOD' set to 'Dec 30, 2018-Jan 5, 2019'; and 'END PERIOD' set to 'Dec 30, 2018-Jan 5, 2019'. A red box highlights the 'PER-PERIOD METRICS' and 'PERIODS' sections. At the top of the main area, there is a 'VIEW' button with an 'UNSAVED' status and a search bar. A red box highlights a settings icon in the top left. The main area displays a table titled 'Group By' with columns for various time periods. A red box highlights the row for 'Garvey, Sara' and the cell for the period 'Jan 20, 2019-J...' which contains the value '50'.

Group By			Dec 30, 2018-J...	Jan 6, 2019-Ja...	Jan 13, 2019-J...	Jan 20, 2019-J...	Jan 27, 2019-F...	Feb 3, 2019-Fe...	Feb 10, 2019-F...	Feb 17, 2019-F...
*Resource↑	Actuals	ETC	Allocations	Allocations	Allocations	Allocations	Allocations	Allocations	Allocations	Allocations
Administrator...	0	0	15	0	0	0	0	0	0	0
DBA	0	192	15	0	0	0	0	0	0	0
Garvey, Sara	0	0	75	50	50	50	0	0	0	0
Network Engi...	0	200	15	0	0	0	0	0	0	0
Project Mana...	0	192	16	0	0	0	0	0	0	0
Storage Archi...	0	200	15	0	0	0	0	0	0	0

# Allocating a Resource in the New UX – From the Staffing View

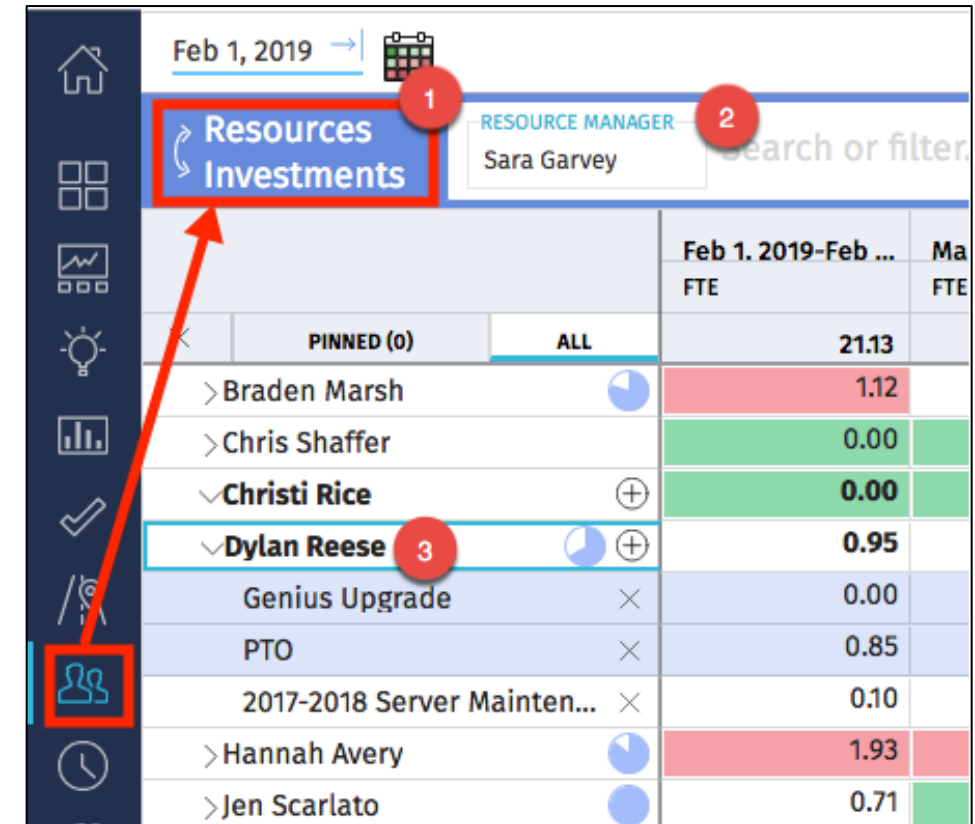


Let Rego be your guide.



# Allocating a Resource to a Project – via Staffing

1. Navigate to the *Staffing* module, and ensure it is set to “Resources to Investments.” If necessary, click to swap the view
2. Next, set the filter. You may want to filter by yourself as RM.
3. Expand the resource you would like to Allocate.

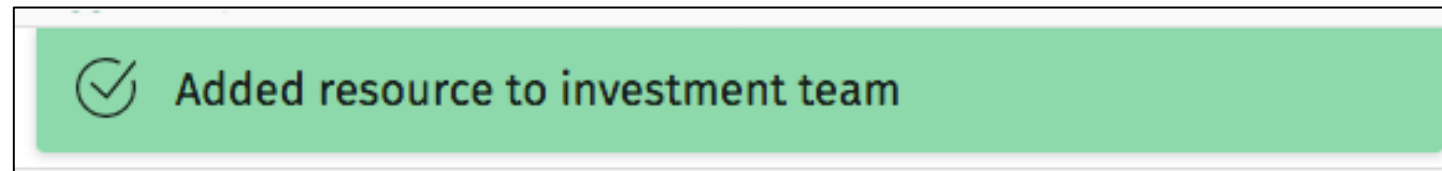


Feb 1, 2019 →		Feb 1, 2019-Feb ...	Ma
		FTE	FTE
<div> <div>Resources Investments</div> <div>RESOURCE MANAGER Sara Garvey</div> </div>			
<div> <div>PINNED (0)</div> <div>ALL</div> </div>		21.13	
<div> <div>&gt; Braden Marsh</div> <div></div> </div>		1.12	
<div> <div>&gt; Chris Shaffer</div> <div></div> </div>		0.00	
<div> <div>✓ Christi Rice</div> <div></div> </div>		0.00	
<div> <div>✓ Dylan Reese</div> <div></div> </div>		0.95	
<div> <div>Genius Upgrade</div> <div>×</div> </div>		0.00	
<div> <div>PTO</div> <div>×</div> </div>		0.85	
<div> <div>2017-2018 Server Mainten...</div> <div>×</div> </div>		0.10	
<div> <div>&gt; Hannah Avery</div> <div></div> </div>		1.93	
<div> <div>&gt; Jen Scarlato</div> <div></div> </div>		0.71	

# Allocating a Resource to a Project – via Staffing

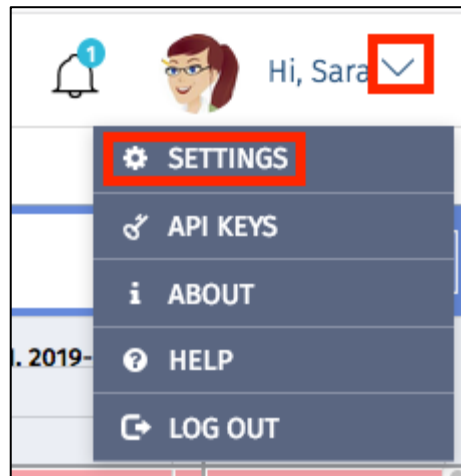
- Click the “+” then search for the project to which you will allocate the resource.
- A notification will appear indicating the resource has been added.

✓Christi Rice	+	0.00
✓Dylan Reese	+	0.95
tracking	CLOSE	
Training Time Tracking (P00000056)		0.00
PTO		0.85
2017-2018 Server Mainten...		0.10



# Update Time Scale and Details

- Navigate to the *Settings* menu to update the timescale for which you are viewing allocation details.
- Note that available periods (e.g., weekly, monthly, quarterly, yearly) are based on the active Fiscal Periods within the system, not the time slices.



 A screenshot of the 'STAFFING' settings page. The left sidebar has 'PROFILE', 'GENERAL', and 'STAFFING' (highlighted with a red box). The main content area includes:
 

- 'START PERIOD: Feb 1, 2020' with a calendar icon, highlighted with a red box.
- 'TIME PERIOD SPAN:' section with a description: 'Select a period type for each span. You can create a total of 60 time periods across all time period spans.' Below it are four rows: '1: Monthly' with a dropdown set to '12', '2: Optional' with a dropdown, and two rows for '3: Optional' and '4: Optional' with empty dropdowns. The first two rows are highlighted with a red box.
- 'UNIT OF MEASURE:' section with radio buttons for 'FTE' and 'Hours' (selected), highlighted with a red box.
- 'DECIMAL DISPLAY:' section with radio buttons for '0.00' (selected), '0.0', and '0'.
- 'CURRENCY:' section with the text '\$USD'.
- 'ALLOCATION THRESHOLD:' section with a description: 'The Resources to Investments view determines the telescope gradient colors based on allocation data by resource. Set the gradient scale to indicate resources that need your attention over any time period. Hover over any color to see the threshold range.' Below this is a 'HEAT MAP' section with a color gradient from green to red. It includes 'UNDER: 30%' and 'OVER: 10%' labels, and a '100%' label at the end of the gradient. The entire heat map section is highlighted with a red box.
- A 'REVERT TO DEFAULT SETTINGS' button in the top right corner.

# Update Time Scaled Allocation

- Update the time scaled allocation periods as necessary.

✓ Reed Campbell	⌚ ⊕	330.78	362.61	360.79	344.40	369.29
Genius Upgrade	⌚	172.79	188.81	187.00	178.50	195.50
Google Mail Transition	⌚	69.19	76.10	76.10	72.65	76.10
PTO	×	88.81	97.69	97.69	93.25	97.69
✓ Bobby Elliott	⌚	160.00	0.00	0.00	0.00	0.00

# Allocation Details

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

The screenshot displays the CA PPM interface. On the left, a sidebar contains icons for home, resources, investments, and a red-bordered icon representing allocation details. The main area is divided into two sections: 'Resources' and 'Requests'. The 'Resources' section shows a table of resource allocations for the period 2017-09. The 'Requests' section shows a table of resource requests for the same period. On the right, a detailed view for 'James Gille' is shown, including his role as 'APJ Research and Development Center (AS1010)', his manager 'Carlos Perez', and his allocation details. The 'Allocation %' is highlighted with a red box and set to 100. Other details include 'Investment Role' as 'Architect', 'Booking Status' as 'Hard', and 'Forecast Rate' as 50. The 'Open for Time Entry' checkbox is checked.

Resources	
2017-09	
	HOURS
PINNED (4)	2,150.40
ALL	76
James Gille	134.00
APJ Research and Development Center (AS1010)	84.00
Quintiles Project 1	50.00
Jason Berry	84.00
Joe Almeida	1,235.60
Paul Berks	0
Rod Bolin	168.00
Ross Hensel	302.00
Sara Garvey	226.80
Sarah Preston	0

Requests	
2017-09	
	HOURS
Architect	504.00
Business Analyst	13

**James Gille**  
APJ Research and Development Center (AS1010)

**DETAIL** CONVERSATIONS

INVESTMENT  
APJ Research and Development Center (AS1010)

INVESTMENT MANAGER  
Carlos Perez

ALLOCATION DATES  
START DATE: Apr 01 2016  
FINISH DATE: Mar 31 20...

ALLOCATION %  
100

INVESTMENT ROLE  
Architect

BOOKING STATUS \*  
Hard

FORECAST RATE  
50

☒ Open for Time Entry

# Resource Management in the Modern UX








Let Rego be your guide.



# Staffing Overview

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

Current Time Period → 		<input checked="" type="checkbox"/> FTE <input type="checkbox"/> Forecast				
Resources Investments		Select Filters 				
		2017-03	2017-04	2017-05	2017-06	TOTALS
		FTE	FTE	FTE	FTE	FTE
×	PINNED (3) ALL	4.20	3.95	3.95	3.85	0.74
★	▼ Andy Cooper 	0.80	0.65	0.65	0.65	0.14
	Collaboration Initiative	0.40	0.40	0.40	0.40	0.04
	Industry Trade Show	0.40	0.25	0.25	0.25	0.10
	Personalized online shoppin...	0	0	0	0	0
★	> Derrick Joseph 	0.70	0.90	0.90	0.90	0.21
★	> Diane Durand 	2.70	2.40	2.40	2.30	0.40

# Role Requests

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

The screenshot displays a software interface for resource management. It is divided into two main sections: 'Resources' and 'Requests'.

**Resources Section:**

- Header: 'Resources Investments' with a 'RESOURCE MANAGER' dropdown set to 'Ross Hensel' and a 'Search or filter...' field.
- Table for '2017-09':

	HOURS	FORECAST
<b>PINNED (4)</b>	<b>2,150.40</b>	<b>76,520</b>
<b>ALL</b>		
> James Gille	134.00	9,200
> Jason Berry	84.00	4,200
> Joe Almeida	1,235.60	1,000
> Paul Berks	0	0
> Rod Bolin	168.00	0
> Ross Hensel	302.00	30,200
> Sara Garvey	226.80	31,920
> Sarah Preston	0	0

**Requests Section:**

- Header: 'Requests' with a 'RESOURCE MANAGER' dropdown set to 'Ross Hensel' and a 'Search or filter...' field.
- Table for '2017-09':

	HOURS	FORECAST
<b>Architect</b>	<b>504.00</b>	<b>13,440</b>
<b>Quintiles Project 1</b>	<b>336.00</b>	<b>13,440</b>
SG - Test Project	168.00	0
> Business Analyst	168.00	0
> Sr. Developer - Java	0	0

**Architect Detail Panel (Quintiles Project 1):**

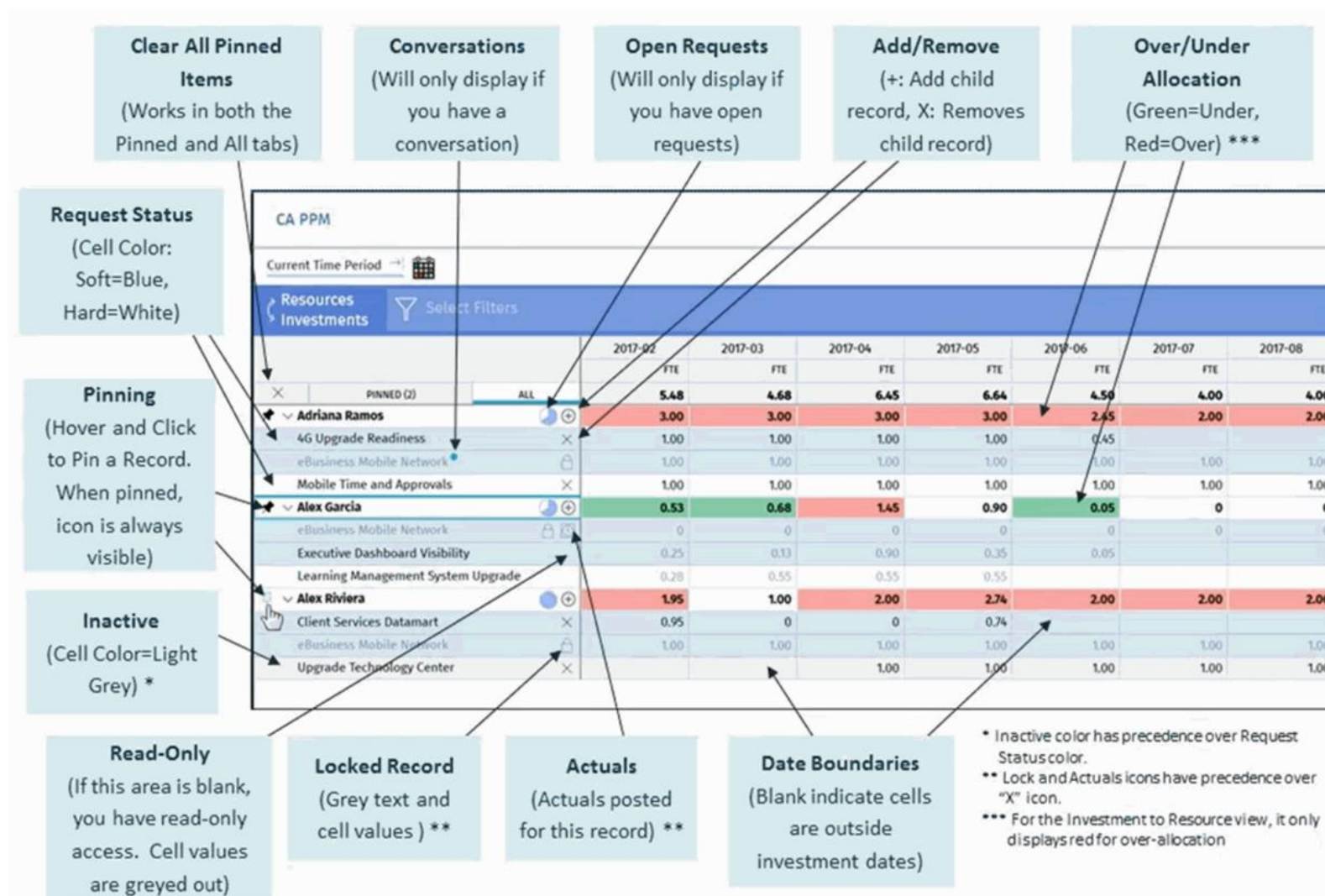
- Investment: Quintiles Project 1 (PRJ00000017)
- Investment Manager: Joyce Bauer
- Allocation Dates: START DATE Jan 01 2017, FINISH DATE Nov 30 2017
- Allocation %: 100
- Forecast Rate: 80
- Role Request: Architect
- Resource Manager: **Hensel, Ross** (highlighted with a red box and an arrow pointing from the 'Quintiles Project 1' row in the Requests table)
- Allocate To: Architect
- Button: CONFIRM ALLOCATION

# Modern 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

Investments Resources			Select Filters					
			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

# Modern UX: Resource Management (3)



# Project Assignments View

- The *Assignments* tab provides the ability to create and manage resource assignments all in one view.

- Utilizes the standard grid view with filters, saved views, export to .csv, etc.

	*Resource	*Start	*Finish	Actuals	ETC	Total Usage	Jan 2020	Feb 2020	Mar 2020	Apr 2020
							ETC	ETC	ETC	ETC
Complete Project Plan	Business Anal...	Jan 01 2020	May 12 2020	0	5		10	10	0	
Complete Project Plan	Architect	Jan 22 2020	Jan 28 2020	0	1		0	0	0	
Complete Project Plan	Project Manag...	Jan 22 2020	Jan 28 2020	0	1		0	0	0	
Complete Project Plan	Business Anal...	Jan 22 2020	Jan 28 2020	0	1		0	0	0	
Complete Project Plan	Project Manag...	May 06 2020	May 12 2020	0	1	1	0	0	0	0
Complete Project Plan	Architect_csk	May 06 2020	May 12 2020	0	1	1	0	0	0	0
Database Development	Developer_csk	Jun 03 2020	Jun 09 2020	0	1	1	0	0	0	0
Database Development	Developer	Feb 19 2020	Feb 25 2020	0	1	1	0	0	0	0
Define Resource Plan	Project Manag...	Apr 22 2020	May 05 2020	0	1	1	0	0	0	0
Define Resource Plan	Project Manag...	Jan 08 2020	Jan 21 2020	0	1	1	0	0	0	0
Define Scope Change and Control...	Project Manag...	Apr 15 2020	Apr 21 2020	0	1	1	0	0	0	0

- Allows for the edit and update of TSV fields, along with other Assignments fields.
- Provides the new user-configurable Details Pane
- Allows for the creation of new Assignments.

Note: Time-scaled metrics utilize the fiscal periods, not the calendar periods. In order to view data in a particular manner (e.g., weekly), those fiscal periods must be set up for the selected time period.

# Allocating a Resource in the Classic UX



Let Rego be your guide.

# 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

Properties Skills Allocations Document Manager Calendar

Resource-Labor: Rod Bolin - Resource/Role Allocations

Scenario: [--Select--] Actions

+ Filter: System Default

			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

SaveAddRemove

Highlighted rows = Approved Flag



# Update Resource Allocation Details

- Clarity 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

Properties

Skills

Allocations

Document Manager

Calendar

Resource-Labor: Rod Bolin - Resource/Role Allocations

Scenario: [--Select--]

Actions

+ Filter: System Default

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

Save

Add

Remove

Properties																			
Investment: Online Application Idea   Resource: Rod Bolin - Staff Member Properties																			
General																			
Investment Start Date: 11/29/2017 Investment Finish Date: 3/1/2018 Start Date: <input type="text"/> Finish Date: <input type="text"/> Default Allocation %: 25.00% Allocation: 128.00 Booking Status: Soft	Resource/Role: Bolin, Rod Investment Role: <input type="text"/> Staff OBS Unit: <input type="text"/> Resume Keywords: <input type="text"/> Open for Time Entry: <input checked="" type="checkbox"/>																		
Planned Allocation	Hard Allocation																		
<table> <tr> <th>Start</th> <th>Finish</th> <th>% Allocation</th> </tr> <tr> <td>11/29/2017</td> <td>3/1/2018</td> <td>25.00%</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	Start	Finish	% Allocation	11/29/2017	3/1/2018	25.00%	<input type="text"/>	<input type="text"/>	<input type="text"/>	<table> <tr> <th>Start</th> <th>Finish</th> <th>% Allocation</th> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	Start	Finish	% Allocation	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Start	Finish	% Allocation																	
11/29/2017	3/1/2018	25.00%																	
<input type="text"/>	<input type="text"/>	<input type="text"/>																	
Start	Finish	% Allocation																	
<input type="text"/>	<input type="text"/>	<input type="text"/>																	
<input type="text"/>	<input type="text"/>	<input type="text"/>																	
<input type="button" value="New Row"/> <input type="button" value="Delete"/>	<input type="button" value="New Row"/> <input type="button" value="Delete"/>																		
<input type="button" value="Save"/> <input type="button" value="Save And Return"/> <input type="button" value="Return"/>																			



# Classic UX Resource Views

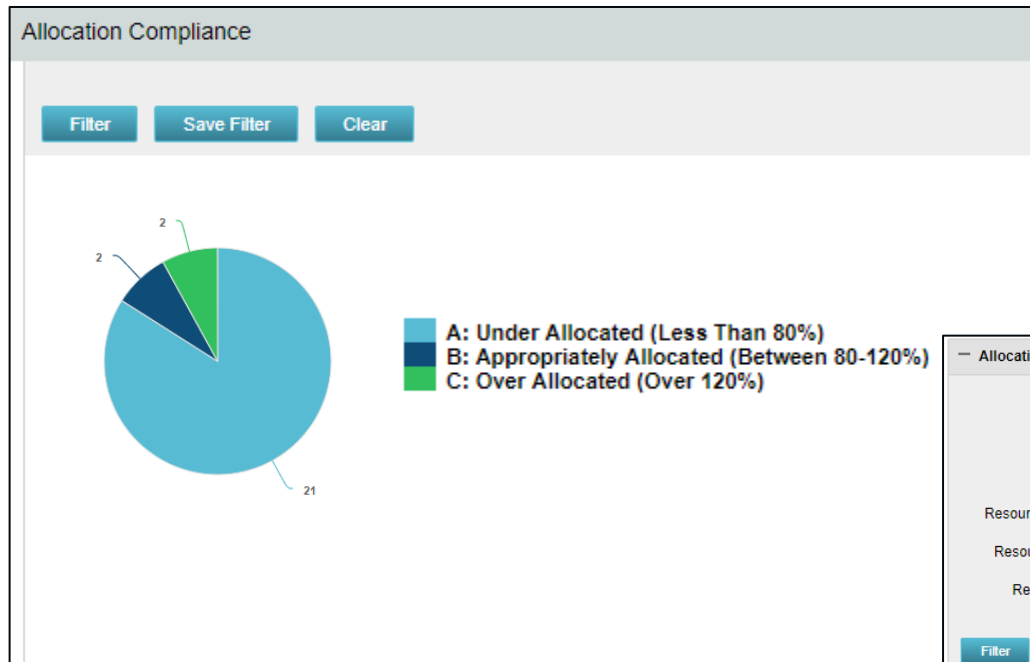
Dashboard and Portlet views



Let Rego be your guide.

# 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

Allocation Compliance List

Filter Show All Save Filter Clear

Resource Name	Resource Manager	Availability	Allocated	Allocation %
Bonham, Jessica	Administrator, PPM	512	640.12	125.0
Joshi, Navdeep	Administrator, PPM	512	632.00	123.4
Total Availability and Allocation & Average %		1,024	1,272.12	124.2

Displaying 1 - 2 of 2

# Base Configuration Portlets

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

Time by Investment   Time by Resource   % Time by Type   Missing Time by OBS										
Time Views: Time by Resource										
Time by Resource										
Resource OBS			Time-scaled Value			Weekly				
Stat Date			Resource							
End Date			Investment							
10/1/2017										
11/30/17										
Filter			Save Filter			Clear				
ID	Name	Resource	2017-10-02	2017-10-09	2017-10-16	2017-10-23	2017-10-30	2017-11-06	2017-11-13	Total to Date
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

# Questions?



Let Rego be your guide.

# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at [pmi.org](https://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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