Clarity PPM Resource Management in a nutshell

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Agenda

— Clarity PPM Resource Management Basic Terminology

— Demo (Everything I can address in 45 minutes!)

— Q&A

What is Clarity Resource Management?

Adding skilled professionals to the right project teams is the key to effective resource management. Resource Management provides a flexible framework in which you can perform and monitor the following resource management activities:

— Create and edit resource profiles that identify a variety of characteristics including primary role, skills, experience, employee type and more.

— View, edit, and track resource project allocations and workloads.

— Compare resource capacity with resource demand.

— Create, edit, and fill simple or detailed resource requisitions.

— Locate resources with specific characteristics, by availability, and more.

Clarity Resource Management Key Terminology

User vs. Resource vs. Team Member

— A <u>User</u> is a person that actually logs into Clarity and uses the application.

— A <u>Resource</u> is a person that can be assigned to a project to perform work.

— A <u>Team</u> member is a resource that has been allocated to a project

NOTE: when you create a new user, a corresponding resource is created; and vis-versa.

Clarity Resource Management Key Terminology Continued

Availability

— The amount of time a resource is able to work on a project; based upon the resource calendar.

Allocation

— The amount of time a team member is allocated to work on a project.

Capacity

— The total full-time employee (FTE) resources available for a role in a project.

Demand

— The amount of time requested for a resource to fulfill on a project.

Clarity Resource Management Key Terminology Continued

Hard Booked status

—A team member whose allocation is committed to a project. This commitment is usually done by a Resource Manager.

Soft Booked status

— A team member who is tentatively booked to a project and whose Allocation has not yet been committed by a Resource Manager. Normally a Project Manager soft books a resource to a project.

Demo

Demo

Skills can be used in Clarity to help define the skill set and interest level for the resource. Administrators can access the Skills Hierarchy from the Admin Tool.

Data Administration

Datamart Settings
Datamart Stoplights
Time Slices
Auto-numbering
Lookups
Incidents
Reports and Jobs
Rooms and Equipment
Skills Hierarchy

Demo
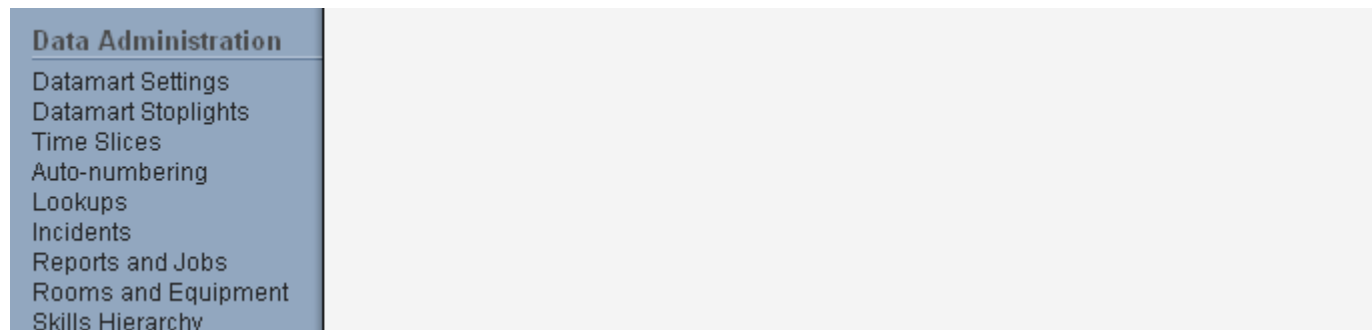
Here's a list of the skills presently in Clarity. To create a new skill, click on "New".

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Demo

Create a skill using the attributes below. You can also define a Parent skill.

Demo

Create a skill using the attributes below. You can also define a Parent skill.

Demo

Select the Skills tab on the in Resource Properties to assign skills to a resource.

Demo

You can not only assign skills but also define the level or proficiency and interest. This will be helpful when Resource Managers staff resources to a project.

Demo

You can not only assign skills but also define the level or proficiency and interest. This will be helpful when Resource Managers staff resources to a project.

Demo

To staff a resource to a project, select "Add" from the team list page; from the Select Resources page, you can filter for roles as I have done below. Just select the role and click "Add"

Select Resources   (Investment: Save the World)

Select Resource Filter

Filter [--Select--] ▾

Resource/Role Name	[ ]	Type [All ▾]
Resource/Role ID	[ ]	Employment [All ▾]
OBS Unit	[ ] 🔍🗑	Active [Yes ▾]
OBS Unit Filter Mode	[Unit only ▾]	Power Filter [Build Power Filter]
Is Role	[Yes ▾]	

Filter | Show All | Save Filter | Clear

	Resource/Role ▲		ID	Email	Resource Type	
☑	Architect	✓	Architect		Labor	
☐	DBA	✓	DBA		Labor	
☐	PM	✓	PM		Labor	
☐	QA	✓	QA		Labor	

Total Results: 4

✓ Add | ✓ Add and Select More | Cancel

Demo

From the Team Staff page, you can choose to replace the role with a resource or Create a Requisition.

Demo

From the Create Requisition page, we are going to request a resource to fulfill the Architect role. Dakshesh will be the booking manager. From here we click "Create and Open"

Demo

To access the requisition, click on the "Requisitions" Link. Also note that that the Role is currently Soft booked, meaning that the Resource manager still needs to approve the booking.

Demo

On the Requisitions page, you can see what requisitions have been requested on this project. Click on the "Architect" link to access the Requisition's properties.

Demo

On the Requisition Properties you can see information about the requisition and also modify the requested amount if you wish. From here, click on the "Resources" Tab.

Requisition Properties   (Project: Save the World | Requisition: Architect)

| Properties | Resources | Discussions | Processes |

Save | Submit | Cancel

General

Requisition Name	Architect	Requested By	Yee, Bill
Requisition ID	50123682010-09-12T14:51:39	Booking Manager	Patel, Dakshesh
Description		Requirement Name	Architect
		Requested Resource	Architect
		Project	Save the World
Due Date	9/12/2010	Unbook	☐
Priority	Medium	Replace	☐
Status	Open		

Requested Amount

	Start	Finish	Percentage
☐	9/7/2010	12/31/2010	100%
☐			

New Row | ✓ Delete

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Demo

The Project Manager can choose to search and add a particular resource to the project by clicking on the "Add" botton.

Demo

Here is a list of resources that are Architects and their availability match. From here you can select "Skills" to if you are interested in a Architect with a particular skill set.

Find Resources   (Project: Save the World)

Match scores may be inaccurate if availability dates do not fall within the following range: 1/31/10 - 1/31/11

| Resource Finder Filter | | | | | | | [--Actions--] |

Filter [--Select--] ▾

Last Name			Availability	9/7/10 - 12/31/10 (672 Hours)
First Name				
Resource ID			Availability Threshold (%)	
				(Hide results below this amount)
OBS Unit			Include Soft-booked Resources	
OBS Unit Filter Mode	Unit only			
Role	Architect		Skills	
Filter Mode	Selected only			
Employment	All		Skills Threshold (%)	
				(Hide results below this amount)
Resume Keywords			Power Filter	[Build Power Filter]

Filter | Show All | Save Filter | Clear

		Last Name ▲	First Name	Resource ID	Employment	Skill Match	Availability Match	Total
☐		Abdul	Jaleel	ahmmd01	Employee		98.81%	98.81%
☐		Aguirre	Debra	daguirre	Employee		98.81%	98.81%
☐		Leone	Joshua	jleone	Employee		98.81%	98.81%

Total Results: 3

Demo

When we search for an architect that have Java Development experience, we see that we now have one result.

Find Resources   (Project: Save the World)

Match scores may be inaccurate if availability dates do not fall within the following range: 1/31/10 - 1/31/11

Resource Finder Filter [--Actions--]

Filter [--Select--] ▼ [Coll

Last Name		Availability	9/7/10 - 12/31/10 (672 Hours)	🔍 🗑
First Name		Availability Threshold (%)		(Hide results below this amount)
Resource ID				
OBS Unit	🔍🗑	Include Soft-booked Resources	☐	
OBS Unit Filter Mode	Unit only ▼			
Role	Architect 🔍🗑	Skills	Java developer; Wt(1); Prf Range: (3 - Beginner - 7 - Advanced); Int(4 - Me	🔍 🗑
Filter Mode	Selected only ▼			
Employment	All ▼			
Resume Keywords				
		Skills Threshold (%)		(Hide results below this amount)
		Power Filter	[Build Power Filter]	

Filter | Show All | Save Filter | Clear

	Last Name▲	First Name	Resource ID	Employment	Skill Match	Availability Match	Total M
☑	Leone	Joshua	jleone	Employee	100.00%	98.81%	99.40%

Total Results: 1

☑ Add | Cancel

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Demo

Here is a graphical representation in a time scale of the requested amount requested.

Requisition Resources (Project: Save the World | Requisition: Architect)

Properties | **Resources** | Discussions | Processes

Requisition Resources - Filter   [--Actions--]

Filter [--Select--] ▼   [Ex

		Resource▲		Start	Finish	Amount	9/6/10	9/13/10	9/20/10	9/27/10	10/4/10	10/11/10	10/18/10	
☐		Leone, Joshua		9/7/10	12/31/10	672.00								
Requested				9/7/10	12/31/10	672.00	32	40	40	40	40	40	40	4
Total				9/7/10	12/31/10	672.00	32	40	40	40	40	40	40	4
Difference						0.00	0	0	0	0	0	0	0	0

Weekly Amount

Total Results: 1

Add | ✓ Delete | Book | Propose

Demo

Dakshesh is the booking manager. He logs into Clarity and selects "Requisitions" from the navigation bar, and he will see a list of requisitions awaiting his action. From here, Dakshesh will click on the Architect link.

Resource Requisitions

Requisition Filter [--Actions--]

Filter [--Select--] [Co

Requisition Name		Status	All
Requisition ID		Priority	All
Booking Manager		Unbook	All
Requested By		Project	

Power Filter [Build Power Filter]

Filter | Show All | Save Filter | Clear

	Requisition ▲		Unbook	Status	Priority	Due Date	Booking Manager	Requested By	Project	Start	Finish	A
☐	Architect			Open	Medium	9/12/10	Patel, Dakshesh	Yee, Bill	Save the World	9/7/10	12/31/10	

Total Results: 1

✓ Delete | ✓ Propose | ✓ Book | ✓ Reject

Demo

Dakshesh can click on the Resources tab and see what resource is requested. If this is acceptible, Dakshesh can click on "Book".

Demo

Now in Dakshesh's requisitions, you can see that this requisition is now booked.

Resource Requisitions

Requisition Filter

Filter [--Select--] ▾

Requisition Name		Status	All ▾	
Requisition ID		Priority	All ▾	
Booking Manager	🔍🗑	Unbook	All ▾	
Requested By	🔍🗑	Project		
		Power Filter	[Build Power Filter]	

≫ Filter | Show All | Save Filter | Clear

	Requisition▲		Unbook	Status	Priority	Due Date	Booking Manager	Requested By	
☐	Architect	👤☰		Booked	Medium	9/12/10	Patel, Dakshesh	Yee, Bill	Sav

Total Results: 1

✓ Delete | ✓ Propose | ✓ Book | ✓ Reject

Demo

Back to the Team on the project, you'll see that the resource is now hard booked to the project inheriting the Role's allocation, and the role remains on the project for historical purposes.

Project: Team: Staff   (Project: Save the World)

| Properties | Team | Tasks | Financial Plans | Chargebacks | Hierarchy | Risks/Issues/Changes | Processes | Dashboard |

Staff : Detail : Role Capacity : Participants : Participant Groups : Requisitions

Scenario [--Plan of Record--] ▾ [New] [More>>] Compare To [--Plan of Record--] ▾

**Project Team**   [--Actions--

Filter [System Default ▾]

			Resource▲		Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation
☐	📋	🔍	Architect	📊	Architect	✓	Soft	Booked	9/7/10	12/31/10	100.0%	0.00
☐	📋	🔍	Dumbrill, Stephanie	📊		✓	Hard	New	9/7/10	12/31/10	100.0%	672.00
☐	📋	🔍	Leone, Joshua	📊	Architect	✓	Hard	Booked	9/7/10	12/31/10	100.0%	672.00

Total Results: 3

[Add] [Add/Update by OBS] [✓ Remove] [More>>]

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Demo

Use the Resource Planning portlets to better manage your resources. You can access the Resource Planning portlets by clicking on Resource Planning on the left hand navigation.

Demo
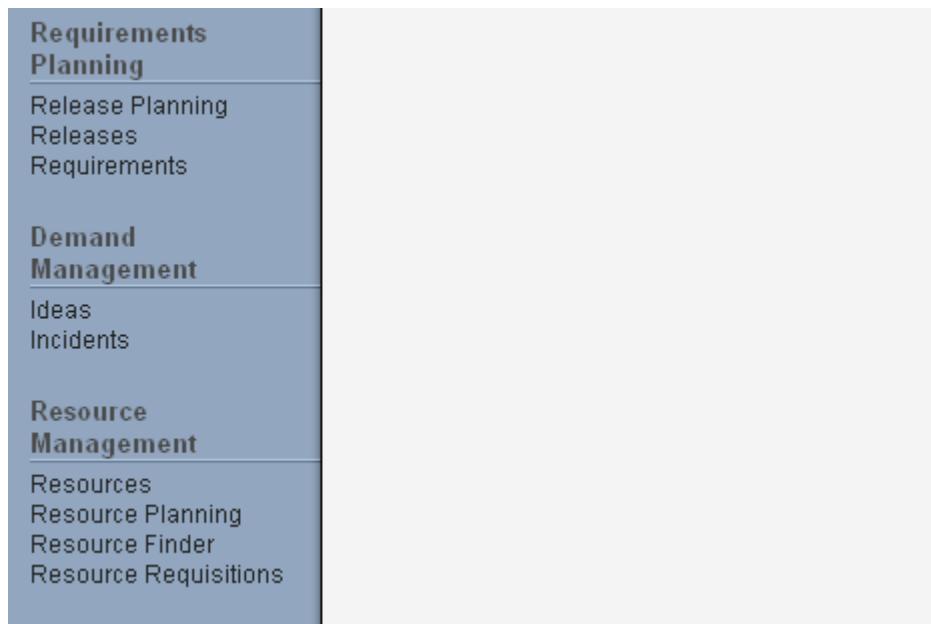
The Resource Workloads Portlet found under the Allocations tab is a great portlet to use to manage your Resource's allocations to projects. As you can see below, Stephanie is overallocated as noted by the red graphic.

Demo

If you select the "Resource Allocation" Icon from the Resource Workload's portlet, you can go to the Resource's Allocation detail page. Here you can see that Stephanie is Allocated 100% on 2 projects for the same time period.

Resource/Role Allocations (Resource-Labor: Stephanie Dumbrill)

Properties | Skills | **Allocations** | Document Manager | Calendar

Summary : **Detail**

Scenario [--Plan of Record--] [▼] | New | More>> | Compare To [--Plan of Record--] [▼]

Allocations - Filter [--Actions--]

Filter System Default [▼]

		Investment Role	Investment▲	Weekly Allocation				
				9/20/10	9/27/10	10/4/10	10/11/10	10/18/10
☐			Keep the Lights On	40.00	40.00	40.00	40.00	40.00
☐			Save the World	40.00	40.00	40.00	40.00	40.00
Aggregation								

Total Results: 2

Add | ✓ Remove | ✓ Shift Allocation | ✓ Accept Hard Allocation | ✓ Commit Planned Allocation

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Demo

Use Scenarios to see how shifting the Allocation on a project will affect the overall allocation. Click on "New" on the Scenario tool bar to create a new scenario. The yellow highlight denotes that you are now in a Scenario. Select a project, and click on "Shift Allocation" to change the Allocation period for a project.

Resource/Role Allocations   (Resource-Labor: Stephanie Dumbrill)

Properties | Skills | **Allocations** | Document Manager | Calendar

Summary : **Detail**

Scenario | New Scenario ▾ | New | More>> | Compare To [--Plan of Record--] ▾

Allocations - Filter

Filter | System Default ▾

			Investment Role	Investment ▲	«		Weekly Allocation	
					9/20/10	9/27/10	10/4/10	10/11/10
☐				Keep the Lights On	40.00	40.00	40.00	40.00
☑				Save the World	40.00	40.00	40.00	40.00
Aggregation								

Total Results: 2

✓ Shift Allocation

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Demo

On the "Shift Allocation" page, you can choose to shift the allocation to a particular date, you can also specify when the shift date should end. If you do not wish to shift the entire allocation, you can shift a percentage of the allocation. In our example, we will shift entire allocation on the project to start in January.

Demo

When you submit, you'll see the resulting allocation shift. You now see that Stephanie is no longer overallocated. NOTE: This does not affect Stephenie's actual allocation the project, it can be used for planning purposes, or be used as a recommendation for the project and resource managers.

Resource/Role Allocations   (Resource-Labor: Stephanie Dumbrill)

| Properties | Skills | **Allocations** | Document Manager | Calendar |

Summary : **Detail**

Scenario [New Scenario ▼] [New] [More>>] Compare To [--Plan of Record--] ▼

Allocations - Filter   [--Actions--]

Filter [System Default ▼]

				◈	Weekly Allocation				
		Investment Role	Investment ▲		Sep 10	Oct 10	Nov 10	Dec 10	Jan 11
☐			Keep the Lights On		144.00	168.00	176.00	184.00	
☐			Save the World						168.00
Aggregation									

Total Results: 2

✓ Shift Allocation

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Demo

Back to the Team on the project, you'll see that the resource is now hard booked to the project inheriting the Role's allocation, and the role remains on the project for historical purposes.

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**Project: Team: Staff** (Project: Save the World)

| Properties | Team | Tasks | Financial Plans | Chargebacks | Hierarchy | Risks/Issues/Changes | Processes | Dashboard |

Staff : Detail : Role Capacity : Participants : Participant Groups : Requisitions

Scenario [--Plan of Record--] ▼ | New | More>> | Compare To [--Plan of Record--] ▼

Project Team [--Actions--

Filter System Default ▼

			Resource▲		Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation
☐	📑	🔍	Architect	📊	Architect	✓	Soft	Booked	9/7/10	12/31/10	100.0%	0.00
☐	📑	🔍	Dumbrill, Stephanie	📊		✓	Hard	New	9/7/10	12/31/10	100.0%	672.00
☐	📑	🔍	Leone, Joshua	📊	Architect	✓	Hard	Booked	9/7/10	12/31/10	100.0%	672.00

Total Results: 3

| Add | Add/Update by OBS | ✓ Remove | More>> |

Questions?

thank you

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