Using Project and Resource Management with Clarity

Self Paced Training Course
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Module 1: Introduction

Clarity's Project Management and Resource Management Modules provide the ability to manage projects and resources and at the same time create foundational information that can be leveraged throughout the Clarity system. The goals of this course are to enable Clarity PPM to become the natural workspace for Project Managers and Resource Managers to be able to successfully complete projects in an efficient manner.

This course was created by xPPM-education, LLC and owns all rights to the material. The Project Management experience at xPPM-education is well over 30 years and the Clarity experience is well over 11 years, tracing the application back through Niku and through ABT, where much of it was originally created.

Learning Objectives:

Lesson 1: Course Purpose and Objectives

Lesson 2: Who Should Attend This Course

Lesson 3: Course Preparation

Lesson 4: Course Method of Instruction
1.1 Purpose and Objective

This is an introductory course on the methods and use of both Project Management and Resource Management using the Clarity PPM application. This course is the first course in a two-course series that in combination are BREAKTHROUGH training to kick-start your proper use of Clarity. The second course in this series is Using Open Workbench with Clarity and together with this course will support transformational change in Project Management and Resources Management.

These transformational objectives are:

- Introduce Best Practice level Project Management and Resource Management using the Clarity application
- Provide the gateway to Assignment level task planning using ETCs
- Build Best Practice project data that can be easily leveraged into powerful information throughout the Clarity application
- Build high quality resource information to properly balance resource allocations within all the investment commitments

1.2 Who Should Attend This Course

This class is principally aimed at those involved in both Project Management and Resource Management using the Clarity PPM application.

This course assumes the there is a basic knowledge of Clarity and the user has a logon to the system as well as basic understanding of project management and resource management concepts.

1.3 Course Preparation

Prior to starting the actual SPT Course, you should have a printed copy of this course manual, have access to a Clarity training sandbox provided by your training administrator, and have received the instructions for accessing and playing the SPT.
1.4 Course Method of Instruction

This course is presented in the on-demand Self Paced Training (SPT) format and is intended to emulate the actual Instructor Led Training. Just like the Instructor Lead Training class, the course material is presented in lectures utilizing slides along with demonstrations from within the Clarity application as well as end of module exercises.

Because it is an SPT, you can take it at your convenience without the bother of going to a classroom, without having to take time away from the project, and can be taken as many times as you wish.
Module 2: Clarity Overview

This module covers the common features in Clarity that affect the use experience in the various Clarity modules: Project Management, Resource Management, Portfolio Management, etc. In this lesson you will learn about the common features of Clarity and how to navigate and configure Clarity to effectively use the tool.

If you are already familiar with these features, you can use this as a refresher /review or just move on to the next module.

**Learning Objectives:**

- **Lesson 1:** Common Features: Overview /Organizer Page
- **Lesson 2:** Common Features: Timesheets
- **Lesson 3:** Common Features: Reports and Portlets
- **Exercises** – Hands-on practices
2.1 Common Features: Overview/Organizer Pages

Overview Page

When you first log on to Clarity you will see the home page, titled Overview: General. This page allows you to quickly access the projects and action items to which you have been assigned, and to view notifications about various events and alerts you have received. You can customize this page according to your needs by changing its contents and layout. While the Overview page is a good home page, you can actually set any current page as your home page.

On the left side of every page in Clarity is the menu navigation area for accessing the various modules in Clarity, like Projects or Resource Planning. The items you see in this menu are completely controlled by the Access Rights assigned to you by the Clarity Administrator or PMO. In the Overview Page, Tabs are presented along the top of the page to allow for convenient grouping of related portlets. Portlets appear on the tab pages to allow for quick access to frequently viewed information, like the My Projects Portlet. All the Portlets are configurable in terms of adding and removing Portlets onto these pages.
Using Project and Resource Management with Clarity

The navigation bar in the upper right corner also is affected by your granted access rights. This allows you to quickly set a current page as the home page, navigate to timesheets, calendar, expand the page, get help, and exit Clarity. The X is the most common /safest method to exit Clarity.

By clicking on the link Personalize in the upper right corner, you can add and remove from the Personalize: Page Content. This Page shows what is active. Click Add to access the Select Content Page.
Select Content Page

- Select the checkbox for the Portlets you wish to add to the Overview Page (there are many Portlets to select from, but again it depends on the Access Rights you have been granted.
- Click on the Add button when ready.
- Select Layout on the left side of the Personalize: Page Content page to select the location layout of the Overview Page Portlets – into three columns (left, center, or Right).

Organizer Page

With the Organizer page, you can access your daily work by viewing and managing your action items, tasks, and events. You can monitor your progress on tasks from this page.

This can be a very valuable feature, especially if you are working with more than one project and have action items from each. This feature allows you to bring all your action items together in one place as opposed to going to each project to review your project specific action items.

Account Settings: Notifications

From the Account Setting (left menu) you access Notifications where you can turn on and off notifications that are generated by Clarity – Email, Alerts, SMS. One or all of these can be turned on or off.
Clarity Notification Examples:

**Action Items:** A notification is sent out when a new action item is assigned to you and when one is due.

**Change Request:** A notification is sent when you have been assigned to a change request.

**Discussion:** A notification is sent when a resource replies to a discussion topic or message you have posted.

**Document:** A notification is sent when a resource adds a new document to the Knowledge Store or Document Manager.

**Finance:** A notification is sent when an external bill is approved and the invoice is generated and you have the finance approval access rights to view it.

**Incidents:** A notification is sent when you are identified as a contact person for an incident.

**Issue:** A notification is sent when you have been assigned to an issue.

**Processes:** A notification is sent when a resource identifies you as the person to contact when a certain step in a process has been reached.

**Projects:** A notification is sent when a resource adds you to or removes you from a project.

**Reports and Job:** A notification is sent when a report or job you initiated, scheduled, or have been assigned to has completed or failed.
Requisitions: A notification is sent when the status of a requisition to which you have access has changed.

Risk: A notification is sent when you have been assigned to a risk.

Timesheets: A notification is sent when a timesheet is submitted. If you submitted a timesheet you may receive notification that it is overdue or it has been returned.

2.2 Common Features: Timesheets

It is common for most resources to report time using Clarity Timesheets. These are basic to Project Management, Resource Management, and Financial Management.

Some of the key issues for consideration by Resource Managers and Project Managers in use of timesheets are:

- Timesheet Approver: Resource Manager or Project Manager
  - Complications of having the PM Approve Timesheets
  - Work around using Pending Actuals

- Late Timesheets: Affect on the Project Schedule
  - Timesheet Posting decrements TASK ETCs
  - If Timesheet NOT posted, project status incomplete
• Timesheet Tasks: Level of detail to track time
  o Too little and no real plan
  o Too much and gets complex and time consuming

2.3 Common Features: Reports and Portlets

Generally, there are two ways to get reporting information from the Clarity application: through Portlets and Reports.

Portlets are live pages that you can navigate to (such as on the Overview page) in each Clarity module. For example, the Resource Management /Resource Planning menu item has a number of Portlets to help manage resource allocations and assignments (we will explore these in detail in a later module). In addition, Portlets can be configured by the user to make them more useful for the practices of each company. In addition to the out of the box Portlets, others are added via Clarity Accelerators (e.g. PMO Accelerator) and your company may add Custom Portlets.

Clarity Reports are accessed through the left menu link – Reports. From there you will find a number of out-of-the-box Reports, Accelerator Reports, and Custom Reports. Your organization will establish processes around reporting progress and issue.
Exercises

1. Add the **Risks** Portlet (using Personalize link) to the **Overview Page**. Using the Layout sublink (left side), change the layout of the Risk Portlet to middle.

2. Add the **Issues** Portlet (using Personalize link) to the **Overview Page**. Using the Layout sublink (left side), change the layout of the Issues Portlet to middle.

3. Add the **Baseline Start** field (using Configure: List Column Layout) to the **Organizer: Tasks – Projects page**. Move the field to be located just below the Start field.

4. Turn **SMS notifications** off using Account Settings menu item.
Module 3: Project Management Features

This module is an introduction to the Clarity Project Management module and serves as a foundation. This course will go into more detail in later modules. Clarity’s Project Management module provides you with a framework in which you can define and track each aspect of your project, from tasks and staff to budgets, actuals, and risks.

Learning Objectives:

Lesson 1: Tour of the Project Management Module
Lesson 2: Using the Project List Portlet
Lesson 3: Creating New Projects
Lesson 4: Monitoring and Controlling Projects

Exercises – Hands-on practices
3.1 Tour of the Project Management Module

Clarity’s Project Management module has a wide range of features to help support the project manager in many of the activities they must perform.

Access the project via the project list page and then click on the project name.

The project main properties tab appears, as well as Teams, Tasks, Financial Plans, Hierarchy, Risk/ issues /change, Collaboration, Processes and Dashboards,

Project Management consists of the following components:

- **Project properties:** Use a project’s properties pages to define project basics, from its name and schedule to baselines that capture snapshots of the project at various stages in its lifecycle. In addition, you can create projects from scratch or from a template.
Using Project and Resource Management with Clarity

- **Team**: Use this component to build a team that includes the staff who will perform the tasks and non-staff participants who can assist staff by communicating information, suggestions, and concerns.

- **Tasks**: Use this component to create tasks and to define a task hierarchy (WBS). You can also associate risks and issues to tasks to help monitor trouble spots.
• **Financial Plan:** Use this component to create a detailed budget.

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<thead>
<tr>
<th></th>
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<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CSK Architect</td>
<td></td>
<td>CSK Architect</td>
<td>40.00</td>
<td>2,493.60</td>
<td>7,060.00</td>
<td>17.44%</td>
<td>46.00</td>
<td>3,408.00</td>
<td>6.00</td>
<td>0.00</td>
</tr>
<tr>
<td>CSK Business Analyst</td>
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<td>CSK Business Analyst</td>
<td>40.00</td>
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<td>7,060.00</td>
<td>20.35%</td>
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<td>3,408.00</td>
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<td>6.00</td>
<td>0.00</td>
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<tr>
<td>CSK Project Manager</td>
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<td>52.00</td>
<td>4,160.00</td>
<td>6.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>212.00</td>
<td>13,760.00</td>
<td>37,460.00</td>
<td>100.00%</td>
<td>13,760.00</td>
<td>13,760.00</td>
<td>0.00</td>
<td>-</td>
</tr>
</tbody>
</table>

• **Hierarchy:** Use this component to associate a parent and child relationship between related projects and their sub projects.
• **Risks:** Use this component to identify and track the risks and issues that can endanger the project.

<table>
<thead>
<tr>
<th>Filters</th>
<th>Actions</th>
<th>[View all]</th>
<th>[Expand filter]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server Access</td>
<td>3004</td>
<td>Open</td>
<td>Eikemo, Noland</td>
</tr>
<tr>
<td>Total Results: 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• **Process:** Use this component to initiate, monitor and manage project processes that run at specific points in the project’s life cycle.

<table>
<thead>
<tr>
<th>Properties</th>
<th>Status</th>
<th>Creator</th>
<th>Probability</th>
<th>Impact</th>
<th>Owner</th>
<th>Abnormal Status Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Results: 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cancel Process</td>
<td>Delete</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• **Audit:** Use this feature to track changes to key attributes.

<table>
<thead>
<tr>
<th>Attribute Name</th>
<th>Old Value</th>
<th>New Value</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finish</td>
<td>5/19/09 8:00 PM</td>
<td>5/19/09 9:00 PM</td>
<td>5/19/09 9:00 PM</td>
</tr>
<tr>
<td>Status</td>
<td>Unapproved</td>
<td>Approved</td>
<td>8/19/09 8:00 PM</td>
</tr>
<tr>
<td>Finish</td>
<td>5/19/09 4:34 PM</td>
<td>5/19/09 4:34 PM</td>
<td>5/19/09 4:34 PM</td>
</tr>
<tr>
<td>Status</td>
<td>Eikemo, Noland</td>
<td>Eikemo, Noland</td>
<td>8/19/09 8:00 PM</td>
</tr>
</tbody>
</table>
- **Dashboard**: Use Clarity reports and dashboards to track and analyze project activities and progress.
3.2 Using the Projects List Portlet

In this Lesson you will learn how to quickly locate your project from among the hundreds of active projects across the business.

Projects must be created in Clarity before you can access them in the Projects list.

To access your projects from Clarity you do the following:

1. Click on the Project link on the left Menu Navigation Bar to access the project list screen.

2. The Projects page then appears. Like many ‘list’ pages in Clarity, there is a top portion that is the filter and a bottom portion this is the list. Use the filter at the top of the screen to quickly locate your project or use the Project List Screen navigation links to navigate to the page where your project is located.
3. Click on the project name to open the project entry in Clarity.

**Searching for Projects**

Use Clarity’s search and filter tools to filter through itemized lists like the project list screen:

Clarity list pages consist of two sections. At the top of the page, the filter section contains search fields that allow you to specify search criteria. Below the filter section is the list section. This section contains an itemized list of projects, resources, portfolios, timesheets, or any other object in Clarity.

The filter section on list pages are either expanded or collapsed by default. Collapsed filter sections have their fields hidden from view.

Enter you search values in the filter section and click the Filter Button. For example, in the Project Filter Manager field, if you select your name (use the binoculars to search and select your name), you will get a list of all active projects on which you are the Project Manager.

If you have more complex search criteria use the Power Filter feature by clicking on the Power filter link.

**Saving Filters**

Once you have entered filtering criteria, you can save the filter to use it later.

To save the entered filtering criteria:

1. In the filter section of any list page, enter filter criteria
2. Click Save Filter. The Save Filter page appears.
3. Enter a name for the filter.
4. To make this filter the default filter, select Default.
5. Click Submit. The list page appears with the saved filter appearing in the Filter pull-down.
Configuring the Projects List Page

In this lesson you will learn how to use the flexibility of the project list screen to rapidly create list views (dashboards) of your projects for saving, editing, and reporting.

All of Clarity’s pages and portlets are formatted as tables with columns and rows. Clarity’s configuration options allow you to reorder, move, add, and hide the columns and fields that appear on Clarity pages and portlets. In addition, you can use Gantt chart and time-scale value configuration options to change the way data is displayed on Clarity portlets.

This is a powerful feature that easily allows you to create your own views or dashboards for managing your projects.

To configure the Projects list page click on the Actions drop down on the upper right corner of the Projects list page, and click on Configure.

The standard Clarity configuration options allow you to make the following changes to page/portlet layout and graphic displays:

- Change the fields and columns on a page or portlet.
- Change the fields and layout on list filters.
- Change the display of graphics and data on Gantt charts.
- Change the display of graphics and data on time-scaled value graphs.

At the Configure page, you have the choice of configuring the:

- List Column Section
- List Filter Section
Configuring the Layout of the List Column Section

The most common configuration feature you are likely to use is to Change the fields and columns on a page or portlet.

You can add fields by clicking and selecting fields from the Available Columns selection box and clicking the right-pointing arrow to move the field to the Select Columns box. You can change the order of the fields by using the up and down arrows to the left of the Select Columns box.

**Configuring the Filter on the Projects list page**

The same applies to making changes to the List filter Section. Fields can be easily added or removed with the same selecting and moving method as with the List Column Section.
3.3 Creating New Projects

In this lesson we discuss the business process for creating projects and who is responsible for creating these projects.

**High level generic project creation process**

Projects come in as Ideas, Unapproved Projects, or Service Requests and are added to the “demand queue” by Portfolio Managers.

Projects are prioritized and approved based on a number of key factors:

- Business Strategic Plan
- Budget Constraints
- IT Strategy and Governance
- IT Architecture Guidelines and Standards
- IT Risk Management
- Resource Capabilities (Talent)
- Sustain IT Solutions
- Current/Planned Workloads

The methodologies covering these processes are considered in the Portfolio Management module and any training associated with these methodologies is outside the scope of this course.

**Creating Projects from Templates**

When a Project is first created in Clarity by the Project Creator, it can be created as NEW or NEW FROM TEMPLATE. In Clarity, only certain resources have the permissions to create projects. These permissions are:

- Project - Create
- Project – Create from Template
If you do not have either of these permissions, you will not see the New button or the New from Template button.

When the project creator clicks on the New from Template button, the Select Project Template portlet is presented to select the template that applies to the project being created. Each organization will create a number of templates that best fit the various type of work that can be performed.

The project template can include data in Project Properties, the Project Team (normally in the form of Roles), the complete Work Breakdown Structure (WBS) of tasks, dependencies, role assignments to tasks, role estimate time for completion (ETC) for each task.

After selecting the template, the template data can be scaled in the project create step. This allows the work effort contained in the template to be increased or decreased depending on the complexity of the project.

Copying Templates into Existing Projects

As the Project Manager on a created project, you have the ability to add template information into the existing project.
From the Properties tab and the Main sub link, notice that there is a link “Copy from Template” on the upper right side of the project information, just below the blue area.

Clicking on this link will present the same options as the New from Template for the project creator. Of course, the use of this feature must be controlled by your organization so that you are following standard processes.

To demonstrate how this feature can be useful beyond initial project template creation, it is possible to add the next phase detail WBS as a Stage Gate is approved, by adding a template that contains only the details for that phase. Some organizations even connect that to a workflow process so that approval of the Stage Gate automatically triggers the creation of a project from a template for the next phase.
3.4 Monitoring and Controlling Projects

In the Clarity context, once a project is created and baselined, it is important that the project manager monitor and control the project. The status and plan updating activities need to be timed around the weekly cycle of timesheet reporting by the project team members. Based on the timesheets, tasks can be started by Clarity based on actual time reported against the task; the ETC for the task (by resource) will be decremented by the amount of actual time against the task for the week. The picture below depicts the weekly update cycle with the explanations below.

**WEEKLY UPDATE CYCLE**

Create – the weekly cycle begins with team members populating their timesheet for the week. By Populating, it brings into the timesheets only tasks that are currently underway or scheduled to start in the next week.
Track – the cycle continues with the daily tracking of task time by the team members. If working a number of tasks, it is generally a better practice to track time daily so that accurate records can be maintained.

Submit – at the end of the weekly timesheet cycle, usually on Friday, each team member ‘Submits’ the timesheet for approval. At that point, it is in the Approvers queue to approve.

Review – because team members often work on a number of projects, it is often difficult to make the PM the timesheet approver. However, there is actually a better way: the PM can review all the timesheets within the project schedule showing team member hours by tasks. This review is with the ‘Pending Actuals’ views.

Approve – the manager reviews the timesheets and approves. Timesheets must be approved before they can be Posted.

Post – the timesheets are Posted, which is a business process that moves the actual project assignment hours into Clarity Actual fields, starts tasks (changes status to Started), decrements that resource’s ETC on each task, and readies the information for further financial posting.

Re-plan – once the weekly posting is complete, the PM can review the schedule, update according to all changed information, and provide status reporting as required. The timing of this activity is important because it cannot start until after posting, yet the revised information may affect team member’s timesheets.
Exercises

1. Go to the Projects list portlet and filter for the Project Manager, Eidsmoe, Noland

2. Go back to the Projects list portlet and configure the List Column Section, Layout to add the Approved Flag to the Selected Columns and then move the new field to right after Project.

3. Now select Baseline usage and move it to Selected Columns and then move it to just under the Approved Flag. Then do the same with Total Effort and move it to just under Baseline Usage.

4. View the final results of the Projects list portlet.
Module 4: Resource Management Features

The success of projects is very much dependant on the availability of resources to be staffed on the project. If not done correctly, resources will be over-committed on too many projects and will not be able to fulfill the work assigned in the project plan. When done correctly, resources are not over-committed and can perform the assigned work on the project.

Learning Objectives:

Lesson 1: Resource Management Definitions
Lesson 2: Resource Manager and Project Manager Interfaces
Lesson 3: Resource Management Process
Lesson 4: Finding Resources

Exercises – Hands-on practices
4.1 Key Resource Management Definitions

Key terms for the objects used in (labor) Resource Management

<table>
<thead>
<tr>
<th>Role</th>
<th>A placeholder for a resource until a named resource can be assigned. Roles are generic resources that represent job responsibilities of the resources assigned to a project. A role defines the work function while a resource identifies the individual who performs that work. Examples of roles include Project Manager, Developer, and Solution Analyst.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource</td>
<td>A named person that can perform work and has availability. A person who can be assigned to perform work on a project and can be associated with skills, primary role, resource pools.</td>
</tr>
<tr>
<td>Primary Role</td>
<td>Each named resource must be given a Primary Role and the Clarity system will aggregate the resources availability into the Roles Capacity for Capacity planning.</td>
</tr>
</tbody>
</table>

Key terms used in defining labor hours/staffing in Resource Management

<table>
<thead>
<tr>
<th>Availability</th>
<th>The hours per day a resource is available for project work. This is stored in a resource’s calendar.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocation</td>
<td>The hours planned for the use of a resource or role on a Project. The Resource Manager is responsible for final allocation of all named resources.</td>
</tr>
<tr>
<td>Assignment</td>
<td>The estimated hours of work effort allotted to each resource or role on a Task. The Project Manager is responsible for all assignments. This is also referred to as ETC.</td>
</tr>
<tr>
<td>Actuals</td>
<td>The actual hours worked on a Task entered by resources in Clarity timesheets and posted in the system.</td>
</tr>
</tbody>
</table>
### Project Booking Commitment Level

<table>
<thead>
<tr>
<th>Soft-Booked</th>
<th>Default booking status. An allocation status indicating that the resource is reserved to work on a project however is not committed to the project by the Resource Manager. This is unfilled demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard-Booked</td>
<td>The Booking Status of a Resource when a Resource Manager commits the resource to a project. When hard-booked, a resource’s allocations can no longer be updated by a Project Manager</td>
</tr>
</tbody>
</table>

#### 4.2 Interface between Resource Manager and Project Manager

The success of projects depends on the good coordination and communication between the Project Manager and the Resource Manager. The Project Manager must communicate with fact-based requirements, which can be determined through best practice use of Clarity.

- **In Clarity – By PM**
  - Initial planning with Roles (Not ready to be filled by resource)

- **In OWB – by PM**
  - Project Schedule with Role
  - Assign ETCs

- **In Clarity – by PM**
  - Make final adjustments to the Role allocations

- **Project Manager and Resource Managers agree on Resource commitments to the project.**
Key Responsibilities

<table>
<thead>
<tr>
<th>Project Manager Responsibilities</th>
<th>Resource Manager Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develop estimates and resource commitments for all active and planned projects</td>
<td>• Perform periodic reviews and updates of resource assignments and allocations</td>
</tr>
<tr>
<td>• Identify resource needs to support work demand</td>
<td>• Communicate resource changes, resource issues, resource risks with the project manager(s)</td>
</tr>
<tr>
<td>• Ensure that the resource manager approves amount of resources needed</td>
<td>• Manage resource committed allocations to projects</td>
</tr>
<tr>
<td>• Keep general project information current</td>
<td>• Manage resource availability</td>
</tr>
<tr>
<td>• Perform periodic reviews of resource assignments versus allocations</td>
<td>• Keep resource attribute information current</td>
</tr>
<tr>
<td>• Communicate resource changes, resource issues, resource risks with resource manager(s)</td>
<td></td>
</tr>
</tbody>
</table>

4.3 Resource Management Process

Each organization has their own ‘twist’ on the Resource Management Process, so this view is one typical best practice process. The process below shows the interface points between the Project Manager and the Resource Manager that are necessary to maintain resource allocations that are not over booked.

In this process, the PM first develops a schedule that is based on the staffing of Roles. Once the schedule is finalized and the Role demands by period are known, the PM and the RM ‘communicate’ on the demand/need. The RM then uses Clarity techniques to find and book the actual resources for the project. After agreement between the two, resources are Hard Booked to the project and become Committed.
4.4 Finding Resources

Finding Resources is much the same as finding projects.

To access Resources from Clarity do the following:

1. Click on the Resource link on the left Menu Navigation Bar to access the Resource List Portlet.

2. The Resource List page then appears. Like many ‘list’ pages in Clarity, there is a top portion that is the filter and a bottom portion this is the list. Use the filter at the top of the screen to quickly locate the resource then click on the Resource to view the resource record.
Configure Resource List portlet

Just as with the Project List page, you can modify the filter section and the list section by selecting Configure from the Actions drop down in the top right corner of the page. From the Configure: list Column Layout, you can then move fields from the Available Columns box to the Selected Columns.

<table>
<thead>
<tr>
<th>Resource Role Name</th>
<th>ID</th>
<th>Email</th>
<th>Resource Type</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbott, L. B.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
<tr>
<td>Abraham, Q. A.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
<tr>
<td>Adams, B.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
<tr>
<td>Allen, D.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
<tr>
<td>Amsterd, L. Q.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
<tr>
<td>Anderson, Q. A.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
<tr>
<td>Atkins, R. P.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
<tr>
<td>Ayang, Q. A.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
<tr>
<td>Davis, D. A.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
<tr>
<td>Day, L. A.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
<tr>
<td>Dederer, A.</td>
<td></td>
<td><a href="mailto:bogas@kinfy.com">bogas@kinfy.com</a></td>
<td>Labor</td>
<td>Employee</td>
</tr>
</tbody>
</table>
Once you have the Resource List page configured, select the resource to work with the resource record.

From the resource record Properties tab, the main resource record can be set or edited, contact information defined, and the resource financial enablement set up.

**Several Key items in the resource record are:**

**Primary Role** - Identifies the key role for the resource on the projects. It is used to determine total capacity by Role.

**Date of Hire /Termination** – Affects when timesheets are available for the resource.
Availability - Determines how many hours per day the resource is available for work on all projects. It is used to determine capacity.

Track Mode/Open for Time Entry - When checked, the Resource can enter time in Clarity for all assigned projects. It should be turned off when the Resource leaves the company.

Resource Manager - The Clarity User responsible for allocating resources to projects and reviewing and approving timesheets.

Skills – Skills that have been defined by the Clarity Administrator (in the admin section of the application), can be selected for each resource.

Calendar – The calendar defines availability and is used to define when ‘non-workdays’ are being taken (e.g. vacation) and affects the resources availability.

Financials – Financials are used in the organization (for financial planning and /or chargeback). The financials must be enabled for each resource.
Exercises

1. Review the Allocations for the Staff on the Project Team for a Project you have access to view.

2. Modify the Resource List page to include Primary Role, Manager, and Availability Rate, and remove Email.

3. Select your own Resource record from the Resource List. Use the Allocation tab and review the Detail Allocations. Are you over allocated? Repeat this for another resource record.
Module 5: Working with Projects

Clarity Project Management Module enables organizations to capture project-related data in a central repository that both rolls up for enterprise tracking and facilitates detailed management and time tracking for projects. In this module, we go through a project from the initial creating through the initial project plan development.

Learning Objectives:

Lesson 1: Project Properties – working with Project Information

Lesson 2: Project Risks/Issues – working with Risks/Issues

Lesson 3: Project Team – allocating Roles and Resources to Projects

Exercises for Lessons 1 - 3 – Hands-on practices

Lesson 4: Project Tasks – working with the WBS

Lesson 5: Project Tasks – working with Resource Assignments

Exercises for Lessons 4 - 5 – Hands-on practices
5.1 Project Properties – Working with Project Information

In this lesson you will learn which attributes you need to update, what values can be entered or selected, and how this affects various related features and reporting in Clarity.
**Project Properties -> Main -> General**

The purpose of this page is to capture the key attributes of the project.

The following table lists the attributes on this page and their descriptions:

<table>
<thead>
<tr>
<th>Key Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Name</td>
<td>Enter unique name for the project (up to 80 characters).</td>
</tr>
<tr>
<td>(Required)</td>
<td></td>
</tr>
<tr>
<td>Project ID</td>
<td>Enter the project’s unique ID (up to 20 characters). May be set to Auto Number by Clarity Administrator</td>
</tr>
<tr>
<td>(Required)</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the project (up to 254 characters).</td>
</tr>
<tr>
<td>Manager</td>
<td>Defaults to the name of the user who creates the project. Click the Browse icon to select another user. PM may be assigned by PMO</td>
</tr>
<tr>
<td>Page Layout</td>
<td>Defines the Dashboard layout that best fits the project – there are four layouts to choose from</td>
</tr>
<tr>
<td>Goal</td>
<td>Specifies the purpose or business case for the project. Select from the six predefined goals or as modified by the Clarity Administrator</td>
</tr>
<tr>
<td>Alignment</td>
<td>Enter a number from 1 to 100 that reflects the importance to the company with 100 being the highest</td>
</tr>
<tr>
<td>Stage</td>
<td>Click the Browse icon to select a company-defined stage for this project, if applicable.</td>
</tr>
<tr>
<td>Status</td>
<td>Select from the three choices: Approved, Unapproved, and Rejected</td>
</tr>
<tr>
<td>Active</td>
<td>Specifies whether the project is active. You must activate the project to allow billing and to allow timesheets to be posted against it. Defaults to Active.</td>
</tr>
<tr>
<td>Program</td>
<td>Select this field if you want to convert the project to a program. For projects to be used as a program, they cannot contain tasks, staff member assignments, nor be financially enabled.</td>
</tr>
<tr>
<td>Required</td>
<td>Used during scenario generation, specifies whether or not this project should be pinned.</td>
</tr>
<tr>
<td>OBS</td>
<td>Select the appropriate OBS node to associate to the project.</td>
</tr>
</tbody>
</table>
Project Properties -> Main -> Schedule

The purpose of this page is to capture the project’s overall start and finish dates as well as control when the project is open for time entry.

The following table lists the attributes on this page and their descriptions:

<table>
<thead>
<tr>
<th>Key Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date (Required)</td>
<td>Enter or select the project’s start date.</td>
</tr>
<tr>
<td>Finish Date (Required)</td>
<td>Enter or select the project’s finish date.</td>
</tr>
<tr>
<td>Set Planned Cost Dates</td>
<td>Used to Keep the Start and Finish dates in sync in the Budget sub page</td>
</tr>
<tr>
<td>Time Entry</td>
<td>Select this field to allow staff members to record the time they work on this project on their timesheets.</td>
</tr>
<tr>
<td>Track Mode</td>
<td>Set to Clarity to track time to the project</td>
</tr>
<tr>
<td>Charge Code</td>
<td>Part of Financials, most often used to set Capital or Expense</td>
</tr>
<tr>
<td>Default Staff OBS Unit</td>
<td>Sets a default that can be used in staffing the project</td>
</tr>
</tbody>
</table>
Project Properties -> Main -> Risk

The purpose of this page is to capture the various risk attribute settings for the project.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Risk</strong></td>
<td>The stoplight in this field indicates the project’s aggregated risk status, as defined by your selections on the Project Properties: Risk page and on the Risk/Issues tab: Green = Low Risk, Yellow = Medium Risk, Red = High Risk. This also displays on the Properties&gt;General Page as well as in various Dashboards and Status Reports.</td>
</tr>
<tr>
<td><strong>Risk Categories</strong></td>
<td>Select from Low, Medium, and High for each risk category. These categories may be edited by your Clarity Administrator /PMO. The category setting becomes read only when a risk has been entered into the Risk section of the project.</td>
</tr>
</tbody>
</table>
Project Properties -> Main -> Budget

The purpose of this page is to capture the high level budget information on the project.

The following table lists the attributes on this page and their descriptions:

<table>
<thead>
<tr>
<th>Key Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency</td>
<td>Select the currency you want Clarity to use when calculating the project’s budget and forecast values.</td>
</tr>
<tr>
<td>Planned Cost</td>
<td>Enter a planned cost for the entire project. Clarity distributes the value you enter between the planned cost start and planned cost finish dates.</td>
</tr>
<tr>
<td>Planned Cost Start</td>
<td>Click Browse to select the start date for the budget. You may or may not want to use the project’s start date.</td>
</tr>
<tr>
<td>Planned Cost Finish</td>
<td>Click Browse to select a finish date for the budget. You may or may not want to use the project’s finish date.</td>
</tr>
<tr>
<td>Planned Benefit</td>
<td>Enter the anticipated financial benefit for this project. Clarity distributes this value between the planned benefit start and finish dates.</td>
</tr>
<tr>
<td>Planned Benefit Start</td>
<td>Planned Benefit start date</td>
</tr>
<tr>
<td>Planned Benefit Finish</td>
<td>Select the scheduled benefit end date.</td>
</tr>
</tbody>
</table>
Using Project and Resource Management with Clarity

**Project Properties -> Main -> Value Metric**

The purpose of this page is to capture the value metrics associated with the project.

<table>
<thead>
<tr>
<th>Key Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Alignment</td>
<td>Calculated value based on input to the four evaluation attributes</td>
</tr>
<tr>
<td>Corporate Priority</td>
<td>Enter the overall Corporate Priority for the Project, values are low, medium, high and very high</td>
</tr>
<tr>
<td>Business Unit Priority</td>
<td>Enter the Business Unit Priority for the Project, values are low, medium, high and very high</td>
</tr>
<tr>
<td>Architectural Fit</td>
<td>Enter the Architectural Fit, values are low, medium, high and very high</td>
</tr>
<tr>
<td>Commercial Value</td>
<td>Enter the Commercial value, values are low, medium, high and very high</td>
</tr>
</tbody>
</table>
The purpose of this page is to capture the financial attributes of the project. Projects must be financially enabled to process financial transactions on them.

Financial implementation is a more advanced and mature use of Clarity and involves much in the way of Design, Configuration, and Training and therefore is outside the scope of this course. A separate one-day training class on Clarity Financial as part of its Best Practice PPM Training Series is available.
5.2 Project Risks / Issues

RISKS

The process of Risk Management includes the identification, analysis, planning, tracking, and communication of risk. Risk strategies help project managers more effectively address uncertainty, thereby minimizing the costly consequences of unforeseen or unmanaged problems. Making informed decisions by consciously assessing potential problems and the severity of their impact is at the heart of project risk management.

You can identify risks at any time during a project’s lifecycle. When you identify a significant risk that appears likely to impact the project in an important way, you can escalate it to an issue. Change requests result from risk and issue identification, and can help facilitate effective resolutions.

The Clarity Risk Management feature consists of the following components:
- Risk Rating: Rate pre-defined risk factors by severity level (previously covered)
- Risks: Create, assign, and track risks, and design response strategies for them.
- Issues: Create, assign, and track issues.
- Change Requests: Create, assign, and track change requests.

There are no limits to the number of risks, issues, and change requests you can create for each project. You can convert risks to issues, issues to risks, and both to change requests. Important! Risk rating is performed on the Project Properties: Main - Risk page. All of the other risk management components and actions are performed from the Risk/Issues tab within a project.

In addition, Clarity allows you do the following for each risk, issue, and change request:
- Create action items
- Attach documents and notes
- Create an audit trail to track progress
- Create processes

How the Risk Rating Component Works with the Other Risk Components

Risks are rated from the Project Properties: Main - Risk page. All other risk management activities are launched from the Risk/Issues tab. If you create a risk entry on the Risk/Issues tab, you must assign it to a category that is equivalent to one of the risk factors listed on the Project Properties: Risk page.

The two risk management components interact if you create a risk entry on the Risk/Issues tab and its overall score differs from the rating you assigned to that same factor on the Project
Properties: Main - Risk page. In that case, the score of the risk entry you created will override the rate you assigned. If you create risk entries on the Risk/Issues tab, but do not assign rates on the Project Properties: Main - Risk page, scores from the risk entries will color the appropriate factor in the list.

**Creating and Managing Risks**

Like projects and programs, risks are created in two stages:

- Part I: Completing the Create Risk page. Use this page to complete risk basics such as a description of the risk, the probability of its occurrence, and its impact on the project.

- Part II: Define the risk’s properties. Use the risk’s properties pages—Risk Properties: Response Strategy and Risk Properties: Main—to define the risk, attach notes, and create action items and processes.
New Risks are created from the risks link under the Risks/issues tab and once created; the Risk Properties page can be accessed by clicking on the risk name.
Complete the following fields in the General section of the page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Risk Name</td>
<td>Enter short name for the risk (up to 64 characters).</td>
</tr>
<tr>
<td>Risk ID</td>
<td>May be set to Autonumber by Clarity Admin. If not, enter a unique identifier assigned to the risk for tracking. This number must be unique. Once the risk is saved, the Risk ID cannot be changed.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a short description of the risk.</td>
</tr>
<tr>
<td>Category</td>
<td>Select the risk category to which you want to assign this risk. These categories are equivalent to the factors that appear in the list of Contributing Factors on the Project Properties: Main - Risk page. When you create a risk using one of these categories, the overall score from the risk overrides any differing status selection you made for this factor/category on the Project Properties: Main - Risk page.</td>
</tr>
<tr>
<td>Owner</td>
<td>Select an owner to manage the risk. This resource is responsible for ensuring that the risk is managed and tracked appropriately through its lifecycle. If an issue or change request is created from this risk, the owner information is carried over to the issue or change request.</td>
</tr>
<tr>
<td>Status</td>
<td>Select the status of this risk. Choices are Open, Work in Progress, Closed, or Resolved.</td>
</tr>
<tr>
<td>Creator</td>
<td>This read-only field displays the name of the resource that created this risk.</td>
</tr>
<tr>
<td>Date Created</td>
<td>This read-only field displays the date this risk was created.</td>
</tr>
<tr>
<td>Updated By</td>
<td>This read-only field displays the name of the resource who last updated this risk.</td>
</tr>
<tr>
<td>Date Last Updated</td>
<td>This read-only field displays the date this risk was last updated.</td>
</tr>
</tbody>
</table>

Complete the following fields in the Details section of the page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Risk Symptoms</td>
<td>Enter the symptoms that have identified this as a risk.</td>
</tr>
<tr>
<td>Impact Description</td>
<td>Enter a description of the result this risk will have on the project.</td>
</tr>
<tr>
<td>Impact Date</td>
<td>Select the date by which repercussions from this risk might impact the project. If an impact date is identified, make sure to enter a target resolution date as well.</td>
</tr>
<tr>
<td>Target Resolution Date</td>
<td>Select the date this risk is targeted to be resolved. This date should be the same or earlier than the impact date.</td>
</tr>
<tr>
<td>Assumptions</td>
<td>Enter the assumptions that have determined that this may be a risk. You can verify these assumptions to make sure they continue to be valid through the duration of the risk’s life. If the assumptions change, the impact or probability of the risk can also change.</td>
</tr>
</tbody>
</table>
**Associated Risks**
Select from a list of other risks within the same project (or program) that are associated with this risk. You cannot link this risk to risks outside the current project (or program).

**Associated Issues**
Select from a list of other issues within the same project (or program) that are associated with this risk. You cannot link this issue to issues outside the current project (or program).

**Response Type**
Select the type of response you want to make with this risk. Choices are: Watch, Accept, Transfer, or Mitigate.

Complete the following fields in the Quantify Risk section of the page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Probability</td>
<td>Select the probability that the impact will occur. The risk probability is used to calculate the risk exposure. Choices are Low, Medium, or High. By default, Low is assigned the value 1, Medium 2, and High 3.</td>
</tr>
<tr>
<td>Impact</td>
<td>Select the effect of the particular risk on the project, determined by the risk's effect on the project's performance, supportability, cost, and schedule. This risk impact is used to calculate the risk exposure. Choose the risk impact or consequence from the pull-down. Choices are Low, Medium, or High. By default, Low is assigned the value 1, Medium 2, and High 3.</td>
</tr>
<tr>
<td>Calculated Risk</td>
<td>This is a read-only score calculated from the selections you make in the Probability and Impact fields.</td>
</tr>
</tbody>
</table>

**Closing a Risk**

Once a risk has been successfully mitigated, change the status of the risk to "Closed" and then enter the final resolution for the risk. A detailed resolution can help you to quickly recall the outcome of a risk response strategy when planning or approaching future project risk plans.

**Deleting a Risk**

Deleting a detailed risk changes the project’s overall risk score as well as the combined risk score for that particular category type. Both of these values appear on the Project Properties: Main - Risk page. To delete a Risk, select it (checkbox) on the Risks List page and click the Delete button.
Response Strategy for the Risk:

To enter the Risk Response Strategy, from the Risk Properties page, select the Response Strategy link in the menu. Enter the response strategies, one at a time, and click the Add button after each.

Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response Strategy</td>
<td>Enter a strategy for addressing this risk. Multiple strategies may be added.</td>
</tr>
<tr>
<td>Assigned To</td>
<td>Click Browse to select the resource to which you want to assign the risk.</td>
</tr>
<tr>
<td>Resolve By</td>
<td>Click the Calendar icon to select the date by which you want the risk resolved.</td>
</tr>
</tbody>
</table>

Associated Action Items /Tasks

A Risk can be associated with an Action Item or a Task as follows:
To Create an Action Item for This Risk:

1. Open the risk for which you want to create an action item. The Risk Properties: Main page appears.

2. Click the Associated Action Items tab. The Risk Associated Action Items page appears.


4. Complete the fields on this page.

**Note:** Be sure to assign a resource to this action item. You can assign the action item to any resource to whom you have access.

5. Click Submit. The Risk Associated Action Items page appears, where you will see the action item you created in the list.

**Associating Tasks to Risks**

To associate a task with a risk:

1. Open the risk for which you want to associate tasks. The Risk Properties: Main page appears.

2. Click the Associated Tasks tab. The Risk Associated Tasks page appears.

3. Do one of the following:
   - To create a new task, click New.
   - To assign the risk to an already existing key task, click Add Existing Tasks. The Select Tasks page appears. Select the key tasks to which you want to associate the risk.

**Note:** You can only assign risks to key tasks. Though non-key tasks display on the Select Tasks page, you can only assign key tasks.

4. Click Submit. The Risk Associated Tasks page appears, where you will see the task you created or selected in the list of tasks. Click the task’s name to edit it. To delete it, select it and click Delete.
Creating a Change Request from a Risk

To Create a Change Request from a Risk:

1. Open the risk from which you want to create a new change request. The Risk Properties: Main page appears.

2. Click Create Change Request. The Create Change Request page appears. You will see that the new change request has inherited the risk’s name and ID number and some of its values.

3. Complete the remaining fields on the page.

4. Click Submit. The Project Change Requests page appears. The new change request is displayed in the list. In addition, an Originating Risk field displays on the Change Request Properties: Main page. This field is a link to the risk from which the change request derived.

ISSUES

Issues are accessed and created from the Risks /Issues /Changes tab using the Issues sub link in the menu. Here existing issues are listed and new issues can be created by clicking on the New button.

Click on the New button to create a new Issue
Complete the Issues information as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue Name</td>
<td>Enter short name for the Issue (up to 64 characters).</td>
</tr>
<tr>
<td>Issue ID</td>
<td>May be set to Autonumber by Clarity Admin. If not, enter a unique identifier assigned to the issue for tracking. This number must be unique. Once the risk is saved, the Issue ID cannot be changed.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a short description of the issue.</td>
</tr>
<tr>
<td>Category</td>
<td>Select the issue category to which you want to assign this issue. These categories are the same used in Risk Category.</td>
</tr>
<tr>
<td>Owner</td>
<td>Select an owner to manage the issue.</td>
</tr>
<tr>
<td>Status</td>
<td>Select the status of this risk. Choices are Open, Work in Progress, Closed, or Resolved.</td>
</tr>
<tr>
<td>Creator</td>
<td>This read-only field displays the name of the resource that created this risk.</td>
</tr>
<tr>
<td>Date Created</td>
<td>This read-only field displays the date this risk was created.</td>
</tr>
<tr>
<td>Updated By</td>
<td>This read-only field displays the name of the resource who last updated this risk.</td>
</tr>
<tr>
<td>Date Last Updated</td>
<td>This read-only field displays the date this risk was last updated.</td>
</tr>
<tr>
<td>Target Resolution Date</td>
<td>Select the date this issue is targeted to be resolved.</td>
</tr>
<tr>
<td>Priority</td>
<td>Select the Issue Priority from Low, medium, or High.</td>
</tr>
</tbody>
</table>
5.3 Project Team

In this lesson you will learn how to get your project staffed with named resources and how this is done using Clarity.

PMs need to know what they can and cannot do with resource staffing and the process to follow for the things they cannot do.

You can staff projects in the following ways:

**Direct selection**: Using this method, you select the resources or roles you want to add to your project from a list of available resources and roles. When you add staff to your project directly, you are automatically booking them to the project. This method is particularly useful when you are pressed for time.

**Requisitions**: This is an advanced method and is not in the scope of this course. Most organizations learn the direct method first with the interactions between the Project Manager and the Resource Manager prior to getting into the formal requisition process.

Use Clarity to build a project team that consists of the following members:

**Staff**: Only staff members can be assigned to tasks and can record the time they work on the tasks in their timesheets.

**Participants**: Project participants use project-level collaboration tools to discuss and monitor project progress, and view general project properties.

Use the **Team tab** to access your project team information. You can access the pages contained within this tab from any project page by selecting the Team tab.
**Best Practice Staffing Sequence in build the Project Plan**

1. Staff the project with roles (these will be replaced by resources later)
2. Plan the project using Roles assigned to the tasks
3. Based on the final schedule, determine Role demands by period
4. Review the Role demands by period with the Resource Manager
5. Resource Manager provides named resources and replaces the roles

**Note:** You can staff a project with multiple instances of the same role but you cannot add multiple instances of the same named resource to a project.

**Project Team Portlet**

- **Properties** - Click this icon to view some of the basic resource profile fields, and to change allocation information, including planned and hard allocations.

- **Resource Finder** - Click this icon to replace a resource or role with a different resource or role.
Click the resource name to view the resource or role’s Resource Properties: Main - General page.

Resource allocation - Click this icon to go to the Resource/Role Allocations page for that resource or role.

Project Role - This column identifies the resource’s role on the project, which can be different from the primary role selected in the resource’s profile.

Time - A yellow checkmark appears in this column if the resource or role is allowed to enter time worked on this project.

Booking Status - This column identifies whether the resource or role has been hard booked, soft booked, or mixed booked.

- Hard: the resource has been committed to the project.
- Soft: the resource has been tentatively scheduled for the project.
- Mixed: both soft and hard allocations exist for the resource.

Note: The "Mixed" booking option may not be available to you depending on your project management settings. For more information, contact your Clarity administrator.

Start date – The date that the resource allocations start on the project. Unless changed, this date defaults to the project start date.

Finish Date – The date that the resource allocations end on the project. Unless changed, this date defaults to the project finish date.

Allocation - This column displays the number of hours the resource has been tentatively booked to the project. Unless you change the booking dates, Clarity will automatically book staff members for the entire duration of the project. Staff members may or may not be assigned to tasks for all of the hours they are allocated to the project. The Allocation cells are not editable but will change to reflect edits you make using:
The setting allocation options
The new allocation curves defined on the Project Staff Member: Properties page
The Shift Allocation option.

**Actuals** - This column displays the total number of hours the resource has recorded to date for tasks on this project.

**ETC** - Estimated Time to Complete. This column displays Clarity’s estimate of how many hours the resource will work on the project based on the number of working days they have been assigned to tasks, and on the number of hours they are available each day.

When adding resources to your project staff, the resource may be overallocated. If this occurs a confirmation page appears that allows you to either overallocate the resource, or to accept any remaining availability the resource might have.

**Note:** You can add multiple instances of a role to a project but not multiple instances of the same named resource. For example, a project’s “programmer (1)” and “programmer (2)” staffing requirements may both be assigned to the same task.

**To add a resource or role to the project staff**

1. Open the project. The Project Properties: Main - General page appears.

2. Click the Team tab. The Project Team: Staff page appears.

3. Click Add. The Select Resources page appears.

**Note:** To add project team members to your project at the OBS level, from the Project Team: Staff page, click Add/Update by OBS.

4. Select the resources and/or roles you want to add to the project staff. Use the Search Filter to find resources or roles by name or other criteria.

5. Click Add to add the resources or roles you selected.
Editing Staff Member Details

Once you have added the resource or role to the project, use the Staff Member Properties page to specify the details for that staffing requirement. When you have specified the details, create requisitions for the staffing requirements.

To edit staff member details:

1. Click the Team tab. The Project Team: Staff page appears.
2. Click the Properties icon for the resource or role to specify the details for that staffing requirement. The Staff Member Properties page appears.
3. Specify the staff member properties:

**Booking Status** - Choose the staff member’s booking status. They can either be soft, hard, or mixed booked on the project. A "Mixed" status indicates that both soft and hard allocations exist for the team member. The booking status is set automatically by Clarity when team members are booked or their allocation changes. You can also set the booking status manually.
For a resource to have separate hard and soft allocations, the system setting for Allow Mixed Booking must be turned on. For more information about this setting, see your Clarity administrator.

Request status – Only used in association with Resource Requisitions.

Investment Role - The role that the resource is being requested to do for this investment (for example, developer, business analyst, or architect).

Planned Allocation - This value represents the time duration for which the resource is needed on the project.

Hard Allocation - This value represents the total amount of hard-booked availability the resource has to the project (as filled out by the resource manager).

Click Submit.
Exercises: Lessons 1 - 3

1. Create a new Project (or open one created for you for this class by the administrator). Edit the name of the project to XXX PM and RM Course Project (where XXX are your initials).

2. Complete the Properties>General fields with appropriate values. Make sure that the project is set to Active and that it is not a Program and it is not a template.

3. Complete the Properties>Schedule fields with appropriate values. Have the Start Date to the beginning of this week and a Finish date of 4 weeks in duration. Make sure the ‘Set Planned Cost Dates’ is checked.

4. Complete the Risk Evaluation on the page Properties>Risk with appropriate values.

5. Complete the Properties>Budget page with the following values: USD, $50,000 planned cost, $150,000 planned benefit, benefit start date at the end of the project and a duration of two years, and check the ‘Calculate NPV data box.


7. Create one new Issue under Risks/Issues/Changes>Issues and complete all description and quantification information.

8. Staff the Project Team with Developer and Architect Roles and add yourself as the Project Manager role.
5.4 Project Tasks - Working with the Work Breakdown Structure

With Clarity there are three methods of developing project schedules:

1. Using the Clarity Application
2. Using Open Workbench
3. Using Microsoft Project

1. Using the Clarity Application (Tasks)

While it is tempting to think of doing all the project scheduling in a web browser, it is recommended that this be used only in the early stages where there is only one Bucket Task per Project or there is only one Bucket Task per Phase. For either of these alternatives, there would be little or no build of task information in Clarity. For one Bucket Task per Phase case, this should be accomplished with the Create from Template approach and is the only case that will be used in this course for working in the Clarity Application.

Follow the TASKS tab to work the schedule in the browser.
In the example above, the schedule has four main phases (outdenting), one task per phase and one (stage gate) milestone per phase. Remember the rule (each organization may differ) – only use this for BUCKET TASKS – at the project level or the phase level.

2. Using Open Workbench

Open workbench is a scheduling application that is seamlessly interfaced with Clarity. It is launched simply by clicking the GO button on the Menu line that reads “Open in open Workbench.”

Here is the same phase –level task bucket schedule displayed in Open workbench (OWB). This was launched by clicking on the GO from the Project Properties tab. And in fact, you can create this schedule in OWB as below and then view it in Clarity TASKS tab as above. Or just the opposite – create in Clarity and view in OWB – it’s all the same data.
Using Project and Resource Management with Clarity

Additional information and training on the use of OWB in scheduling the project is contained in the training course “Using Open Workbench with Clarity”, part of the Best Practice PPM Training Series.

3. Using Microsoft Project

Using MSP acts the same was as OWB. However, the Project must be set up by the Clarity Administrator to interface with MSP. In that case, the GO button on the Menu line reads “Open in Microsoft Project”

Several words of caution:

- NEVER use both MSP and OWB on a schedule
- There are RULES for use of MSP in Clarity that are much different than the way MSP is used as a desktop scheduler and must be followed (e.g. summary level task dependencies are NOT allowed).

Additional information and training on the use of MSP in scheduling the project is contained in the training course “Using MSP with Clarity”, part of the Best Practice PPM Training Series.

Working with Clarity Tasks

Tasks Overview

Use Project Management to create and manage project tasks and to assign staff to them. If desired, you can create a Work Breakdown Structure (WBS) for them, and view resource utilization by task assignment.

In addition, you can use the Auto scheduler to create and publish an automated schedule based on task constraints and dependencies that you create. The Auto scheduler is designed so that it can (if option selected) eliminate or minimize the overallocation of resources. It is particularly useful when you want to update the project schedule after you or others have made small, quick changes to it. You can review your changes before publishing them and accordingly arrive at a practical result.
Task Terminology and Definitions

1. **Outdent** - An outdented task often has subordinate tasks beneath it. Click Outdent to designate a task as a top-level or "parent" task.

2. **Indent** - An indented task is a subordinate task. It is dependent on a higher-level task in some way. Click Indent to designate a task as a subordinate or "child" task.

3. **Key Task** - A key task is one that is significant in some way.

4. **Summary Task** - A summary task is a top-level (parent) task that has subordinate or "child" tasks beneath it.

5. **Non-Key Task** - A non-key task (any task not identified as Key) can be either a parent or a child task.

6. **Parent Task** - A parent task is a top-level (summary) task that has subordinate or "child" tasks beneath it.

7. **Child Task** - A child task is nested beneath a summary or "parent" task.

Accessing Project Tasks

You can access project task functionality on the Project Tasks: Task List page. This page contains the following sub tabs on the page toolbar from which you can do the following:

- **Task List**: This sub tab displays key tasks in a list format. To view subordinate tasks, click the Expand Filter link, then the Show All link. You can create and edit tasks from this page.

- **Work Breakdown Structure**: This sub tab displays all of the tasks you create: subordinate tasks, non-key subordinate tasks, and milestone tasks. Use the Project Tasks: Work Breakdown Structure page to design a hierarchical (parent-child) relationship between the tasks you create. You can create, edit, and reorder tasks from this page.

- **Resource Utilization**: Use this sub tab to view the total effort by resource and task, and to initiate auto scheduling.

- **Assignments**: Use this sub tab to assign resources to the tasks you create.

- **Forms**: This sub tab allows you to view and complete any forms that are attached to the tasks.
To access project task functionality:

- From the Projects page, open the project for which you want to create tasks.
- Click the Tasks tab. The Project Tasks: Task List page appears.
- Navigate to the Work Breakdown Structure sub link direct to the right.

- This WBS was created from a Template; it is the Best Practice method of creating the WBS.

Given that there are a minimal number of WBS lines (‘Bucket Task Rule’), there are only a few editing steps (note: assigning resources is in the next lesson and is not covered here):

1. Edit the Task Properties
2. Add a new Task, Milestone, or Summary (Parent) Task
3. Add a task Dependency
4. Autoschedule the Project
1. Edit the Task Properties

- From the Work Breakdown Structure sub link under TASKS tab, click on the + sign to the left of the Summary Task name to expand and show all the tasks and milestones.

- Click on the Task Name to bring up the Task Properties page. Here you can change the Name, the duration, and add/modify dependencies.

2. Add a new Task, Milestone, or Summary (Parent) Task:

1. From the Work Breakdown Structure sub link under TASKS tab, click on the New button. This action brings up the Task Properties page.

2. Click New. The Create Task page appears.
3. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>Enter a descriptive name for the task (up to 64 characters).</td>
</tr>
<tr>
<td><strong>ID</strong></td>
<td>Enter a unique ID for the task (up to 16 characters).</td>
</tr>
<tr>
<td><strong>Start</strong></td>
<td>Enter the date on which you want task work to start. Task work cannot start before the project’s start date.</td>
</tr>
<tr>
<td><strong>Finish</strong></td>
<td>Enter the date by which you want the task to be complete. A task cannot finish after the project’s finish date.</td>
</tr>
<tr>
<td><strong>Milestone</strong></td>
<td>Select this field if you want to designate this task as a milestone task. If you do so, you will notice after clicking Save that the Finish date field disappears. This is because milestone tasks can only have a due date, not a duration (a period between a start and finish date).</td>
</tr>
<tr>
<td><strong>Key Task</strong></td>
<td>Select this field if you want to identify this task as a key task. You can define a key task as one that is significant in some way. For example, it might be one whose completion is essential to the start date of other tasks.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Indicate the status of the task. Choices are Completed, Not Started, or Started.</td>
</tr>
</tbody>
</table>
| **% Complete**| Enter a number that indicates the percentage of work that has been completed for the task. Use the following as a guideline:  
  - Not Started = 0%  
  - Started with Actuals Posted = 1-99%  
  - Completed = 100% |
4. Click Submit.

**Indenting Tasks**

Indent a task to move it to a level subordinate to the task above it. The task above it in the hierarchy can be a top-most task, or a second-, third-, or fourth level task relative to the task above it.

Keep in mind several Rules on Tasks:

- The lowest level task is where the work is defined by adding resources and an ETC, you cannot do this on Summary Level Tasks.
- Keep the number of levels to a minimum, they are summary tasks and may add clutter.
- Dependencies are also only defined at the lowest level task, not on the summary level.

1. Select the checkbox of the task(s) you want to indent. When you are indenting to the same level you can select multiple tasks at once.

2. Click Indent (from the WBS Layout button). The page refreshes. The task(s) you indented have folded one level under the nearest higher level task. A Plus icon appears in front of the higher level task. Click it to see the task(s) you indented beneath it. An error message appears if a task cannot be indented.

**Outdenting Tasks**

1. Select the checkbox for the task that you want to outdent.

2. Click Outdent (from the WBS Layout button). The page refreshes and the task appears as outdented relative to the task above it. An error message displays if the task cannot be outdented.

**Note:** If the task to outdent has subordinate tasks beneath it, the subordinate tasks will automatically follow their "parent."

**Moving Tasks**

1. Select the checkbox for the task you want to move.
2. Click Move (from the WBS Layout button). The Move Tasks page appears. The name of the task you are moving appears near the top of the page.

3. Select the task that will be above or beneath the task you are moving.

4. If you want the task you are moving to be above the selection, click Insert Before. If you want the task you are moving to be beneath the selection, click Insert After.

3. Add a task Dependency

From the Task Properties page, select the Dependencies link from the menu.

Click on New to establish a dependency to another task or tasks

Select the Task that will have the dependency relationship

4. Autoschedule the Project

When you change the duration of a task, add dependencies, charge time to the project, you should AUTOSCHEDULE the task to effect the schedule changes. Click on the Autoschedule button in the middle menu item. Select the Autoschedule date that is the start of the current week time period. No other check items are necessary for this level of WBS. Click the Autoschedule button. A ‘Tentative Schedule’ appears in the menu with a Gold Bar across the menu. If the new dates are acceptable, then click on Publish in the menu, otherwise click Delete Schedule to delete the tentative schedule and return to the previous schedule version.
Gantt View

To view the project schedule in a Gantt Chart view, click on the Gantt button.
5.5 Project Tasks – working with Resource Assignments

In this lesson you will learn how to assign resources to tasks (work assignment) and how this affects time reporting and other related project features.

After creating the tasks and assigning staff to the project, assign staff members to the tasks. Staff members can then add the tasks to their timesheets and record time spent on them. Timesheet actuals are generated from the staff members approved hours they record on their timesheets.

Staff Assignment Guidelines

When assigning resources to tasks, keep the following in mind:

- Staff cannot be added to milestone or summary (parent) tasks.

- Avoid overallocating resources, which can cause scheduling delays and less effective performance. See module 6 on Staffing the Project, allocation methods, and working with the Resource Manager.

- Since this lesson covers assigning resources to tasks in Clarity and not OWB, it is limited to the more manageable one-bucket-task-per-phase approach.

- The initial resource assignments should be by Roles, which would then be replaced by named resources once you know the demand by period. Work with the Resource Manager in assigning the resources.

Assigning Staff to Tasks

1. Select the Tasks tab. The Project Tasks: Task List page appears.

2. From the Work Breakdown Structure page, open the task to which you want to assign staff. The Task Properties page for that task appears.
3. In the Assignments section of the page, click Assign. The Assign Resources page appears.

4. Select the staff to assign to the task and click Assign. The staff appears in the Assignments section of the Task Properties page.
5. Resource assignments can be removed by selecting the resource and click remove or replace. **Note:** you can only remove a resource from a task (or from a project) as long as there are NO actual hours posted against the task for that resource.

6. Click on the resource’s assignment properties icon (left of the name) to set the loading pattern and the ETC.

![Assignment Properties](image)

7. As a general rule, when scheduling in Clarity, keep the Loading Pattern set to contour. The Start and Finish dates will default to the task Start and Finish dates. Enter the estimated ETC for the resource.

The assigned staff can now add the task to their timesheets and, after the task start date, can record time spent on the task. Use the Actuals and ETC columns to compare actuals to estimates.
Exercises: Lessons 4 - 5

1. Open the Project XXX PM and RM Course Project (where XXX are your initials) that you created in the last exercise.

2. Remove all the Staff (roles and resources) from the Project Team in the Team>Staff page (hint: Select all checkboxes and click the Remove button).

3. Based on what you have learned about the project, you know that it will take 7 weeks. Go to the Properties>Schedule page and change the Finish Date to be 7 weeks from the Start Date (make sure to start on a Monday and finish on a Friday). SAVE.

4. Based on what you know about the project, you can build the Team and the Tasks from a template. From the Properties >General page, select Copy from Template. From the list, select the NE Project Template and scale at the default 0%.

5. Review the Project Team allocation in the Team>Staff page.

6. Review the Tasks and schedule from the Tasks>Work Breakdown Structure page.

7. Select each work task and review the Roles assigned to each task and the ETC for each.

8. Review the Tasks and Role assignment and ETC from the assignments sublink (Tasks>Assignments).

9. Base on what you have learned about the project; change the Project Manager ETC to 20 hours on the Planning Phase Work task; 40 hours on the Design Phase Work task; 40 hours on the Construction Phase Work task; and 40 hours on the Deployment Phase Work task. (Go into the Task Properties for each task and in the Assignments section at the bottom, change to Edit Mode and change the Project Manager ETC). SAVE EACH CHANGE.

10. Autoschedule the Project from the Tasks>Work Breakdown Structure page (use the Autoschedule button). Uncheck the Resource Constraints checkbox and use an Autoschedule date of the Project Start Date. Click the PUBLISH button when the Autoschedule is complete to accept the changes.

11. Review the results in the Gantt Chart (click the Gantt button). Also review the results in the Tasks>Assignments page.
Module 6: Staffing Projects

It is normally the responsibility of the Resource Manager to work with the Project Manager in staffing the project based on the role demands presented in the project plan within Clarity.

This module will provide the ability to quickly and efficiently locate resources, work with the resource list screen, locate projects, and demonstrate how to plan projects and work efforts by allocating generic resources (roles) and named resources.

Learning Objectives:

Lesson 1: Resources and Project Staffing in Clarity
Lesson 2: Baselining the Project
Lesson 3: Staffing the Project

Exercises – Hands on practices
6.1 Resources and Project Staffing in Clarity

The project staffing/fulfillment process is important to the Best Practice resource management and in keeping resource allocations within the resource availability. The process, introduced in module 4, is covered in more detail below:

1. The project is typically created by a Project Creator who populates the following:
   - Key data fields populated.
   - Linked to OBS reporting structures.
   - WBS Template added.
   - Project Manager assigned and given edit rights.
2. **Project Manager builds the project plan:**
   - In [Clarity] Adds Roles and sets initial allocations.
   - In [Clarity or OWB] Updates the Work Breakdown Structure.
   - In [Clarity or OWB] Assigns Roles to tasks and ETC hours.
   - In [Clarity or OWB] Creates Dependency Links between Tasks and Milestones.
   - In [Clarity or OWB] Schedules the plan.
   - In [Clarity or Clarity] Baselines the plan.

3. **Project Manager requests Resources to replace Roles:**
   - In [Clarity Team tab] select all team staff members and click the More button then select Allocate from Estimate.
   - The Role project demands are now set to the project plan
   - Project Manager then communicates with Resource Manager – in person, phone, or email
   - The Project Manager will rely on the Resource Management portlet in Resource Planning

4. **Resource Manager fulfills the Resource requests:**
   - Using Resource Finder, the Resource Manager locates a resource
   - Considerations: Role, Availability, and skills

5. **Project Manager replaces Roles with Resources allocated by the Resource Manager:**
   - This may be the Resource Manager in some organizations

6. **Resource Manager commits the allocated Resources:**
   - Changes the booking to ‘Hard Booked’
6.2 Baselining the Project

Clarity allows you to create multiple baselines. Baselining generally occurs, for the first time, before resources enter time on a project. After you create the initial baseline, you can create additional baselines at various intervals, such as mid-way through the project, when different phases complete, and at the project’s end (each organization’s PMO will establish the policies that affect when and how to baseline). This initial baseline allows you to compare estimates to actuals once the project is underway.

The following rules are enforced when creating baselines:

- If a project is locked, it cannot be baselined. A project is automatically locked when it is open in Open Workbench or Microsoft Project. To unlock a project, close it in Open Workbench or Microsoft Project.

- Use Open Workbench or Microsoft Project to perform detailed baselining. With Open Workbench, you can baseline the entire project, all of the tasks in a view, or selected tasks. See Using Clarity with Open Workbench and Microsoft Project for more information.

To baseline a project

- Open the project in Clarity. The Project Properties: Main>General page appears.

- Select the Baseline sub-tab from the properties page toolbar. The Project Properties: Baseline Revisions page appears.

- Click New. The Baseline Revision Properties page appears.

- Complete the following fields:
Using Project and Resource Management with Clarity

1. **Revision Name**: Enter a descriptive revision name for the baseline, such as "Initial Baseline", "Mid-Term Baseline" or "Final Baseline".

2. **Revision ID**: If not set to Auto-numbering, enter a revision number or name that indicates the baseline version number, such as "v1" or "v5".

3. **Description**: Enter a description for the new baseline.

4. **Current revision**: Select this field when you want to make this baseline the current baseline. This field is only selectable when multiple revisions exist.

   - Click Submit. The Project Properties: Baseline Revisions page appears which shows the name of the baseline created.
Updating Baselines

An existing baseline can be updated rather than creating a new one. For example, you might want to update an existing baseline to include data from recently posted actuals. Updating a baseline changes its values accordingly. When you choose to update a baseline, the baseline you select becomes the current baseline and a yellow check mark appears in the Current column for that baseline. The selected baseline's data overrides the previously marked current baseline and is set as the service's current revision. You can verify which baseline is current on the Project Properties: Baseline Revisions page.

Baselines can be updated from the Project Properties: Baseline Revisions page, the Project Tasks: Task List, or the Project Tasks: Work Breakdown Structure pages. The instructions below explain how to update a baseline from the Project Properties: Baseline Revisions page.

To update a project's baseline:

- Open the project in Clarity. The Project Properties: Main - General page appears.
- Select the Baseline sub-tab from the properties page toolbar. The Project Properties: Baseline Revisions page appears.
- Select the check box next to the baseline to update.
- Click Update Baseline. The Confirm Revision Update message appears.
Using Project and Resource Management with Clarity

6.3 Staffing the Project

To create resource demand build staff plans of named resources or roles. This section will describe how this can be done in Clarity.

The first step is to build the expected Staff using Roles in the Team tab. Each defaults to 100% allocation over the duration of the project. This was explained in Module 5.

The second step is to build the project plan in Clarity, Open Workbench, or MSP. This was also explained in Module 5.

The third step is to Allocate from Estimates for all Roles. This is accomplished by selecting the checkbox for all the team members and clicking on the More button in the Project Team Portlet. Next, select ‘Allocate from Estimates’. This resets the Allocation requirements to agree with the plan.

In the fourth step, the Resource Manager uses the Resource finder icon to locate possible resources to fill the project demand. Note that this can be done from the Project Team portlet within the project or from the Unfilled Requirements portlet in the Resource Planning menu bar item. The filter section of the Resource Finder can be set to help refine the search.
The results of the search are displayed at the bottom as a list of candidates.
The following describes the key fields in the Resource Finder:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OBS Unit</td>
<td>Use the OBS Unit and OBS Filter Mode to search for resources that belong to specific OBS units.</td>
</tr>
<tr>
<td>Role</td>
<td>The role will default from the Project Role for the Team Member line being searched. If necessary, this can be changed or removed as search criteria.</td>
</tr>
<tr>
<td>Availability</td>
<td>Use this field to locate resources that will be available during a certain time period. Click the Browse icon to specify the dates during which you want the resource to be available.</td>
</tr>
<tr>
<td>Availability Threshold (%)</td>
<td>In the Availability Threshold field, enter the percentage of time during this period over which the resource or resources must be available. The Resource Finder excludes resources whose availability falls below the amount you enter.</td>
</tr>
<tr>
<td>Include Soft-booked Resources</td>
<td>Select the Include Soft-Booked Resources check box to include resources whose time during the availability window has already been soft-booked.</td>
</tr>
<tr>
<td>Skills</td>
<td>Use this field to locate resources that have certain skills associated with their profile. Click the Browse icon to specify the skills and the skill level required. Skill levels are 1 - 10.</td>
</tr>
<tr>
<td>Skills Threshold (%)</td>
<td>This field works in tandem with the Skill field. Enter the percentage of skills over which the resource or resources must have. The Resource Finder will exclude resources whose skill-match falls below the amount you enter.</td>
</tr>
<tr>
<td>Skills Match</td>
<td>Read only - Results of the search.</td>
</tr>
<tr>
<td>Availability Match</td>
<td>Read only - Results of the search. Availability Match column displays a score that factors in the work period and the availability of each resource.</td>
</tr>
<tr>
<td>Total Match</td>
<td>Read only - Results of the search. Displays the average of the two scores. If only Availability is used in the search, then the Total Match is the same score as the Availability Match.</td>
</tr>
</tbody>
</table>

The fifth step is to select the resource that best matches the need and click the Replace button.
As part of this step, the Book Confirmation alert is presented to let you know that you are [soft] booking the resource to the project.

**Booking Confirmation**

At the end of this step, as a result of the booking actions, the resource has now replaced the role for the Allocation and also on all task assignments.

As a final Step, with the agreement between the Resource Management and the Project Manager that the resource will be the team member, the Booking Status is changed to Hard Booked.
Exercises

1. Open the Project XXX PM and RM Course Project (where XXX are your initials) that you created in the last exercise.

2. Baseline the project from the Properties>Baseline sublink.

3. As the PM. Allocate from Estimates in the Team>Staff page. Select each Role and then click the More button to highlight the sub-menu: select Allocate from Estimates. Review the differences.

4. As the RM. From the Unfilled Requirements portlet (Resource Planning > allocations sub-tab), filter your project requirements and then use the Resource finder to locate a possible resource to replace each role. Inform the PM.

5. As the PM. From the Project Team portlet (Team>Staff), use the resource finder on each role and select the resource recommended by the RM. Select the resource and click the Replace button and confirm the Booking confirmation. Repeat for all roles. Notify the RM that the recommendations have been soft booked to the project and the RM should now COMMIT.

6. As the RM. From the Bookings Status portlet (Resource Planning>Allocations), change the portlet to edit mode and change the Booking Status for each to Hard.
Module 7: Resource Planning

This module covers the portlets that are available to help analyze resource utilization, resource demand, resource staffing requirements, timesheet actuals, and role capacity. As a Resource Manager, it is one of the key tools in Clarity that can be utilized to accomplish the objectives of resource management.

**Learning Objectives:**

Lesson 1: Key Resource Management Issues

Lesson 2: Using the Resource Management Portlets

Lesson 3: Configuring the Resource Workloads Portlet

Lesson 3: Configuring the Project Team Detail Portlet

**Exercises** – Hands on practices
7.1 Key Resource Management Issues

Both Resource Managers and Project Managers are concerned about Resource Management Issues from different standpoints: The Project Manager from the project perspective and the Resource Manager from the resource perspective. The issues that need to be monitored and controlled are:

1) Over-Committed Resources:

   **Allocations > Availability**

   This is a common problem that occurs when there is little attention to Resource Management. An example might be that a resource is allocated to three projects at 100% each.

2) Under-Committed Resources:

   **Allocations < Availability**

   This is also a common problem that occurs when there is little attention to Resource Management. An example might be that a resource is allocated to three projects and the total for all projects is only 60%.

3) Over-Assigned Resources

   **ETC or Actuals > Allocations**

   It is the responsibility of the Project Manager to work within the committed allocated amount and if more is needed, communicate the need to the Resource Manager.

4) Under-Assigned Resources

   **ETC or Actuals< Allocations**

   It is the responsibility of the Project Manager to work within the committed allocated amount and if more is need, communicate the need to the Resource Manager.
7.2 Resource Management Portlets

Clarity contains a powerful set of Resource Planning portlets that enable you to work with the Key Resource Management Issues and to view, edit, and compare resource allocation and availability in aggregate (across all investments or for all roles) or at the level of individual investments and roles. Resource planning portlets provide a flexible, scalable framework in which to manage and compare resource and role allocations with resource and role availability. Use resource planning to view and edit resource and role allocations in the following ways:

- By Project, by Role, By Resource, by Manager, by OBS by week
- For a single Project or across multiple projects
- In a graphic histogram format that contrasts availability and allocation
- In a table format that displays allocation information by investment, resource, or role

Resource Planning portlets are provided in four tabs: **Workloads, Allocations, Capacity, and Investments.**

### Workloads

This is the default page that displays when you select Resource Planning from the Resource Management menu. This page displays the combined allocations of each resource for all of the investments to which they are assigned.

The Resource Planning Workloads page uses a graphic format to display the combined allocations of each resource across all of the investments to which the resource is assigned. Use this page to quickly and easily compare the availability of each resource to the number of hours that has been allocated to projects.

- **Yellow**: Indicates the resource is allocated at or under availability for that time period.
- **Red**: Indicates the resource is overallocated (i.e. the amount of time booked exceeds availability) for that time period.
- **Green**: Indicates actuals recorded by the resource for that time period. Only posted actuals appear in the graph. If no actuals have been posted, no actuals will appear in the graph.

When you scroll over the histogram for each week, a note summarizing the resource's allocation and availability for that period appears.
You can drill down into any one histogram to view the underlying details, as follows by the example of drilling into the red histogram for Noland Eidsmoe to see the cause of the red overallocation:
ALLOCATIONS

This tab provides four different ways of viewing and editing resource and role allocations on individual investments. It shows the intersection between resource and investment at the team level.

**Weekly Detail**: This portlet provides a histogram view of each resource allocation by investment and week.

**Unfilled Requirements**: This portlet provides a table view of each unfilled role and the investments to which it has been assigned.

**Booking Status**: This portlet lists by individual rows all of the investments each resource is assigned to. It also displays and allows you to view and change the resource and booking status for each investment.

**Allocation Discrepancy**: This portlet lists team records whose intended allocations deviate from the actuals tracked against the investment. The resource manager can specify which records to display by altering the Deviation Threshold percentage value in the filter section of the portlet. Only team records to which you have access rights and that are within a specified time frame display in the portlet.
The Unfilled Requirements portlet can be used by the Resource Manager to search for new project requirements (Role demands) to be filled with named Resources. Expand the filter to help search the requirements.
The Booking Status portlet can be used by the Resource Manager to perform the actual COMMIT process of changing the named resource Booking Status to Hard Booked.
**CAPACITY**

**Role Capacity.** This portlet shows overall demand versus capacity for resources across all investments aggregated by role. The data is displayed for each month grouped under quarters. You can also see how total demand varies from total capacity for each role.

**Note:** When evaluating role capacity, you can consider resources that are yet to be hired (but that have been planned for). In case they do not actually get hired, you can exclude these resources to view the difference they cause in role capacity. On the Role Capacity portlet, click Expand Filter to access the Include To-be-hired Resources filter option.

<table>
<thead>
<tr>
<th>Role Capacity</th>
<th>Demand Capacity</th>
<th>Q3 2009</th>
<th>Q4 2009</th>
<th>Q1 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Aug 09</td>
<td>Sep 09</td>
<td>Oct 09</td>
</tr>
<tr>
<td>CSK Architect</td>
<td>Demand Capacity</td>
<td>1.90</td>
<td>2.18</td>
<td>1.50</td>
</tr>
<tr>
<td></td>
<td>Capacity</td>
<td>2.50</td>
<td>2.00</td>
<td>2.00</td>
</tr>
<tr>
<td>CSK Business Analyst</td>
<td>Demand Capacity</td>
<td>1.19</td>
<td>1.68</td>
<td>1.00</td>
</tr>
<tr>
<td>CSK Chief Executive Officer</td>
<td>Demand Capacity</td>
<td>1.80</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td>CSK Developer</td>
<td>Demand Capacity</td>
<td>2.89</td>
<td>3.18</td>
<td>2.20</td>
</tr>
<tr>
<td></td>
<td>Capacity</td>
<td>3.80</td>
<td>3.00</td>
<td>2.00</td>
</tr>
<tr>
<td>CSK Financial Analyst</td>
<td>Demand Capacity</td>
<td>1.36</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td></td>
<td>Capacity</td>
<td>2.36</td>
<td>2.00</td>
<td>2.00</td>
</tr>
<tr>
<td>CSK Program Manager</td>
<td>Demand Capacity</td>
<td>1.50</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td></td>
<td>Capacity</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
</tr>
<tr>
<td>CSK Project Manager</td>
<td>Demand Capacity</td>
<td>6.15</td>
<td>6.68</td>
<td>6.00</td>
</tr>
<tr>
<td></td>
<td>Capacity</td>
<td>3.86</td>
<td>3.00</td>
<td>3.00</td>
</tr>
<tr>
<td>CSK Test Engineer</td>
<td>Demand Capacity</td>
<td>1.76</td>
<td>2.00</td>
<td>2.00</td>
</tr>
<tr>
<td></td>
<td>Capacity</td>
<td>1.76</td>
<td>2.00</td>
<td>2.00</td>
</tr>
</tbody>
</table>

**Total Demand**  
15.76 17.72 15.00 9.43 7.87 1.00  
**Total Capacity**  
11.00 11.00 11.00 11.00 11.00 11.00  
**Variance**  
-4.76 -6.72 -4.00 1.57 3.13 10.00
INVESTMENTS

This tab lists and aggregates demand for all investments by OBS. Assuming the data is organized by OBS, you can drill down and view allocation data at different levels within the selected OBS unit.

- Hard-booked demand is calculated using the Team Hard Allocation on the Staff Member Properties: General page.

- Total demand (hard and soft) is calculated using the Team Planned Allocation on the Staff Member Properties: General page.

To see any data on the OBS Investment Aggregation portlet, you must expand the filter, set an OBS unit type and click Filter. It is recommended that you define and save a default filter for this portlet so that it displays data that is appropriate for you.
7.3 Configuring the Resource Workloads Portlet

Many of the portlets will be more useful to you if you configure them to the information you need to accomplish your objectives in the most efficient way possible. To that end, a good example is how the Resource Workloads portlet can be configured to improve the information for the Resource Manager.

**Step 1:** Starting point information not too useful. Selection Actions and Configure the portlet. Remove Resource ID from the Selected Columns in the Layout link.

**Step 2:** Select the Fields link and click the Allocation Properties box.
Step 3: In the Time Scaled Value Column Setting, move the Availability Rate, Actuals, and ETC fields from Available to Selected. Change Display Type to Number. Check the Checkbox on Show Legend Column. Change the Decimal Places to 0. Click the Submit button to save and exit.

**FINAL RESULTS:** The Workloads will show useful information at-a-glance for the Resource Manager.
7.4 Configuring the Project Team Detail Portlet

For the Project Manager, The Project Team portlet (Team>Detail) may be more useful if it were to be configured to be numbers rather than bar graphs and to include all the areas to monitor: Allocations, ETC, Actuals, and Total Usage. This way, all the project team level information is instantly available in this portlet.

Make the configuration changes as follows:

**STEP 1:** Select Configure from the Select dropdown in the portlet. Configure Fields from the List Column Section, then the Properties Icon on the Weekly Allocation.
STEP 2: In the Time Scaled Value Column Setting, move the Actuals, ETC, and Total Usage fields from Available to Selected. Change Display Type to Number. Check the Checkbox on Show Legend Column. Change the Decimal Places to 0. Click the Submit button to save and exit.

STEP 3: Check the results on the Project Team portlet. Then select Configure and select Aggregation from the List Column Section.
STEP 4: Click the Add button and then add Allocation, Actuals, ETC, and Total Usage.

The Project Team Detail portlet is now configured to provide useful information for the Project Manager to be able to monitor and control from a glance the primary effort numbers by Resource, Role, and Aggregation.
Exercises

1. Configure the Resource Workloads Portlet to change 1) the Graph to a Number, 2) add the Actuals and ETC fields, and 3) change from 2 decimals to 0.

2. Configure the Project Team Detail Portlet to change 1) the Graph to a Number, 2) add the Actuals ETC, and Total Usage fields and 3) change from 2 decimals to 0.
Module 8: Project Reporting

This module focuses on the project reporting that is available in the Dashboard tab within each project. Now that the project has been created and planned appropriately, the dashboard can assist in the monitoring and controlling of the project to keep it on track.

Learning Objectives:

Lesson 1: Project Reporting with the Project Dashboard

Exercises – Hands on practices
8.1 Project Reporting with the Project Dashboard

The project Dashboard, the last tab on the project tab list, contains a number of project information portlets that are completely configurable.

The first configuration option occurs with the **Page Layout** field on the Project Properties page. This field allows the selection of a Dashboard layout from a choice of four layouts (assuming the PMO Accelerator has been installed).

**Page Layout**

Defines the page layout you want to use to view project or program data. Values include:

- **Program Layout**: Use this layout to view budget data on the Project Dashboard page.

- **Project Default Layout**: Use this layout to view the default labor and team utilization charts on the Project Dashboard page.

- **Project Status Dashboard**: This layout is only available if you have installed the PMO Accelerator add-in.
Project Storyboard Dashboard: This layout is only available if you have installed the PMO Accelerator add-in.

Using and Configuring the Project Dashboard

Selecting the Page Layout provides a preconfigured layout of portlets, the portlets and their order are completely configurable from the Dashboard tab, using the Personalize link. By selecting the Project Storyboard Layout as a starting point, we get a set of five useful portlets that we can then add to by configuring (remember, the order and location in the dashboard is controlled from the Layout link on the left).

Issues By Priority

The Issues By Priority portlet displays a pie graph showing all open issues on the project, grouped by priority. Each pie segment reflects the number of issues by priority, giving a graphical and overall view of a project’s status in terms of issues raised. An issue is considered open if it has a status other than closed.
Late Tasks and Milestones

This portlet displays a list of tasks that are not completed and late. A task is considered not completed if it has a status other than completed. A task is considered late if it has a due date (Finish Date) that is later than the baseline due date. The Days Late column shows the number of days the task is late (Current Due Date – Baseline Due Date). The Gantt view shows the task timeline on a monthly basis. The color of the Gantt bars is determined by whether the tasks are on the critical path, as follows:

- Green: Late, but not on the Critical Path
- Red: Late and on the Critical Path

Open Milestones

This portlet displays a list of milestones and current schedule status and only shows milestones that are not completed. A milestone is considered not completed if it has a status other than completed. The Days Late column shows the number of days the milestone is late (Current Due Date – Baseline Due Date). The color of the Schedule stoplight is calculated based on the number of days it is late (Days Late), as follows:

- Green: On Schedule
- Yellow: Late by <= 2 Days
- Red: Late by > 2 Days
Team Capacity

This portlet shows future resource needs on projects. This portlet shows the project’s resource demand, compared to the remaining allocation of the team members currently staffed on the project.

The graph begins with the current month (based on the current calendar date) and moves forward for the duration of the project. The Staff Allocation is equal to the remaining allocation on the project. The Demand is the same value you enter in the project's Current ETC.

![Team Capacity Graph]

Team Member Task Summary

This portlet displays details about the current status for project tasks, such as Estimated Time to Complete (ETC), actuals, and a monthly Gantt view of the current schedule. The ETC and actuals display on the page so project managers have an aggregate view of task delivery.

To view the task in the full project plan (Work Breakdown Structure), click the name of a task from the list.

<table>
<thead>
<tr>
<th>Project</th>
<th>Task</th>
<th>Priority</th>
<th>Status</th>
<th>ETC</th>
<th>Actuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>NE 2</td>
<td>Additional Class Demo Project - Planning Phase Work</td>
<td>Started</td>
<td>0.00</td>
<td>10.00</td>
<td></td>
</tr>
<tr>
<td>NE 2</td>
<td>Additional Class Demo Project - Design Phase Work</td>
<td>Not Started</td>
<td>20.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>NE 2</td>
<td>Additional Class Demo Project - Construction Phase Work</td>
<td>Not Started</td>
<td>20.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>NE 2</td>
<td>Additional Class Demo Project - Deployment Phase Work</td>
<td>Not Started</td>
<td>20.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Aggregation</td>
<td></td>
<td></td>
<td>60.00</td>
<td>10.00</td>
<td></td>
</tr>
</tbody>
</table>
[ADD] Using the General Portlet

This is a read-only view that displays basic information about the project as shown below. This portlet cannot be configured and can only be used as is. If it is redundant with other information, it can be removed from the Dashboard.

![Project Dashboard Screenshot]

[ADD] Using the Labor Effort Portlet

The Labor Effort portlet as shown above, allows you to quickly compare up-to-date labor hours actuals and estimates, and see in a glance overall baseline and allocation variances. This portlet is not configurable.

[ADD] Using the Team Utilization Portlet

![Team Utilization Table]

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Exercises

1. Select the **Project Storyboard Dashboard** from the Page Layout in the Project Properties>Main>General page and Save.

2. Review the **Project Storyboard portlets** in the Dashboard.

3. In the **Team Member Task Summary** portlet, add a Save Filter and filter for the project name and then name the filter and make it the default.

4. In the **Late Tasks and Milestones** portlet, if you do not have any late items, then go to the Tasks>WBS and change the date for the Planning Phase Gate milestone to be a week late and save. Now go back to the Late Tasks and Milestones portlet and you should see that that milestone is 7 days late.

5. Use the Personalize link to add the **General** portlet, the **Labor Effort** portlet and the **Team Utilization** portlet to the Dashboard. Then use the Layout link to move the General portlet to the top left column and the Labor Effort portlet to just under it. Move the Team Utilization portlet to the bottom on the left side.

6. Configure the **Team Utilization** portlet so that the time scale starts the week before. To do this, pick Time-Scales Value from the Select dropdown and change the Start Date to the Rolling Date selection **Start of Previous Week** and Submit.
THANK YOU

FOR ATTENDING THIS COURSE