



Clarity Resource Management Login Procedures

- Login to PC as yourself:
 - Username = username
 - Password = enter your password
- Run the Default Registry (Clarity Open Workbench)
 - K:\InfoTech\Internal Services\PMO\PM\Clarity
- Login into Clarity Production

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Clarity Resource Management Agenda

- Background
- Current State
- Current Challenges
- Process Improvements
- Questions

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Clarity Resource Management Definition



- **Resource Management** is the practice of managing projects and resources in order to have the right resources on the right projects at the right time.
- Resource Management includes detailed forecasting at the project and task level. This enables you to control and predict resource utilization throughout the project lifecycle.

Clarity Resource Management Background



- OCIT has been using Clarity since 1997
- Upgraded to various versions over the years
- Many of the Resource Utilization processes are still the same
- Custom Resource Utilization (RU) Reports
- OCIT has approximately 200 users tracking time in Clarity

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Clarity Resource Management

Why was this Important?

- Easily identify resource constraints.
- Align resources to the high priority projects.
- Reduces the amount of manual efforts required to develop and maintain resource plans.
- Creates transparency of resource information.

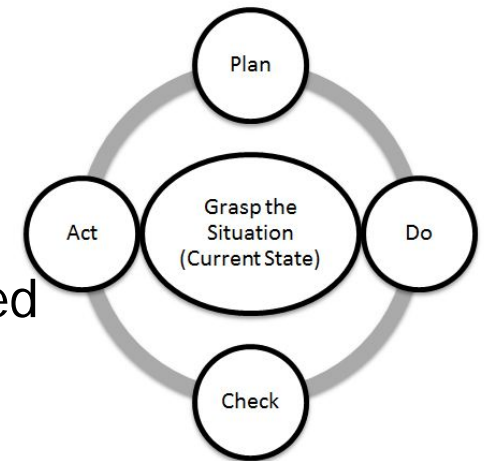
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Clarity Resource Management Keys to Success

- Resources must track ALL hours worked in a week.
- Project timelines/schedules must remain current.
 - They represent the overall commitment of resources to the project. If the timeline changes, without an update within Clarity, the resource's commitment is over/understated.
- Resource requests must be responded to in a timely manner.
 - Over commitment must be resolved in a timely manner.

Clarity Resource Management Availability

- Resource Definition
 - Employees, Contractors, Part-Time Employees and Students
- Standard Availability
 - FTE – 7.0 hours per day
 - Contractors – 8.0 hours per day
 - Part-Time Employees/Students – individually defined
- Roles - referred to as “generic resources.”



Clarity Resource Management Assignments

- Assignments to Projects
 - Resource negotiation is mainly handled via phone call, meeting or email
 - PMO hard books resources when a project is approved
 - Resource over commitment is monitored by Resource Managers
- Master Planning
 - OCIT has a 2 year Master Plan
 - Projects are classified into different Labor Categories

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Clarity Resource Management

Why Am I Here

- Why Am I Here
 - PMO is Listening to You!



Clarity Resource Management Current Challenges



- Challenge #1
 - Takes too long to run updated Resource Utilization reports



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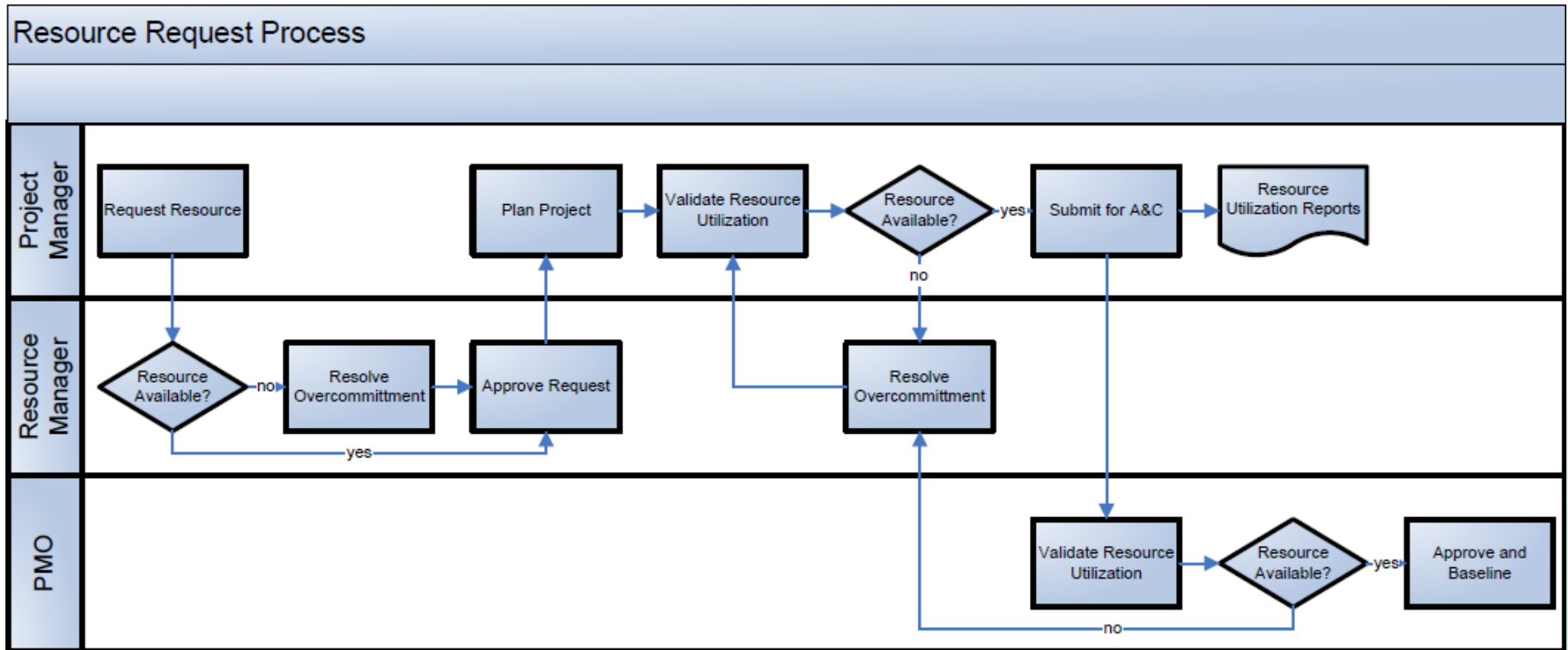
Clarity Resource Management Current Challenges

- Challenge #2
 - Too much time to resolve resource over commitments
 - Too much back and forth between Project Mgr. and Resource Mgr.



Clarity Resource Management

Resource Request Process



Clarity Resource Management Current Challenges

- Challenge #3
 - Based on metrics, there are way too many Date Renegotiations



Clarity Resource Management

Current Challenges

- Schedule Variance
 - Almost half of our projects undergo at least one Date Renegotiation
 - Average Date Renegotiation is 79 days
 - 72% of projects still finish late
 - Availability of IT Resources is the primary reason 35% of the time

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Clarity Resource Management Process Improvements

- So Let's Improve these 3 Processes!



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Clarity Resource Management Process Improvement #1

- NEW Resource Utilization Portlet
 - Let's gain those 5 minutes and possibly hours back
 - Let's work together to negotiate and resolve resource over commitment up front












Portlets Workloads

Resource Workloads												
Resource▲	Resource ID	Primary Role	Availability Rate		Monthly Allocation							
					Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15
Adams, Lawrence	ADAM	Training Specialist	7.00	Availability Rate	140	140	133	154	154	140	154	154
				Total Usage	192	153	131	153	153	139	153	153
				Capacity - Assignment	(52)	(13)	2	1	1	1	1	1
				Allocation	440	440	418	484	484	440	484	484
				Capacity - Allocation	(300)	(300)	(285)	(330)	(330)	(300)	(330)	(330)
Albright, Eugene	ALBE	Radio Support	7.00	Availability Rate	140	140	133	154	154	140	154	154
				Total Usage	140	143	120	122	122	111	122	122
				Capacity - Assignment		(3)	13	32	32	29	32	32
				Allocation	840	840	798	924	924	840	924	924
				Capacity - Allocation	(700)	(700)	(665)	(770)	(770)	(700)	(770)	(770)

- Similar to Resource Utilization Summary
- Information is real-time
- **Capacity – Assignment** is the difference between Availability and Total Usage
- Can be used by RMs for Weekly Tracking, Quarterly Reviews, and determining availability for new project requests
- Can be used by PMs prior to requesting a particular resource for a project

Portlets

Resource/Role Allocation

<input type="checkbox"/>			Project Role	Project	Project Manager	Approved Flag	Actuals	ETC	Total Usage	Allocation	Average Allocation Percent	Booking Status	Avail Start	Avail Finish ▲		Resource Usage							
																Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15
<input type="checkbox"/>			Workstation Services	Imaging Server Replacement	Bendy, Michele	✓	2.00	0.00	2.00	2,492.00	100.00%	Hard	9/16/13	2/24/15	Actuals ETC Total Usage Allocation Hard Allocation	140	140	112					
<input type="checkbox"/>			CLEMIS	2014-15 CLEMIS Technical Support Customer Support	McRae, Tim	✓	623.00	921.11	1,544.11	1,736.00	100.00%	Soft	9/27/14	9/25/15	Actuals ETC Total Usage Allocation Hard Allocation	140 140 140	140 140 140	32 112 133	80 126 154	126 126 154	114 114 140	126 126 154	126 126 154
<input type="checkbox"/>			CLEMIS	2014-15 CLEMIS Technical Support System Maintenance	McRae, Tim	✓	52.00	139.33	191.33	1,729.00	100.00%	Hard	9/30/14	9/25/15	Actuals ETC Total Usage Allocation Hard Allocation	12 12 140	12 12 140	8 12 133	19 19 154	19 19 154	17 17 140	19 19 154	19 19 154
<input type="checkbox"/>			CLEMIS	2014-15 CLEMIS Technical Support Non-Project	McRae, Tim	✓	0.00	0.00	0.00	0.00	0.00%	Hard	9/30/14	9/25/15	Actuals ETC Total Usage Allocation Hard Allocation								
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Aggregation									9,506.00		400.00%												

- Similar to Resource Utilization Detail
- Graphically shows over commitment (red bar)

Clarity Resource Management Process Improvement #2

- The use of Allocations and Allocation Segments
 - Let's reduce the number of Date Renegotiations by creating more realistic project schedules.
 - Able to produce additional reports to measure our success!



Clarity Resource Management Process Improvements



- Definitions (The 3 A's)

- **Availability:** The number of hours a resource is available to work on any given day. This is setup by PMO in Clarity when the resource is hired. Availability is also referred to as *Capacity*.
- **Assignments:** The amount of work designated for a resource on a specific task. RMs and PMs assign resources to tasks. Assignment is also referred to as *Total Usage*, or *Actuals + Estimate to Complete (ETC)*.
- **Allocation:** The hours, or % of time, a resource is designated to perform work on a specific project. RMs and PMs will begin allocating time for resources.

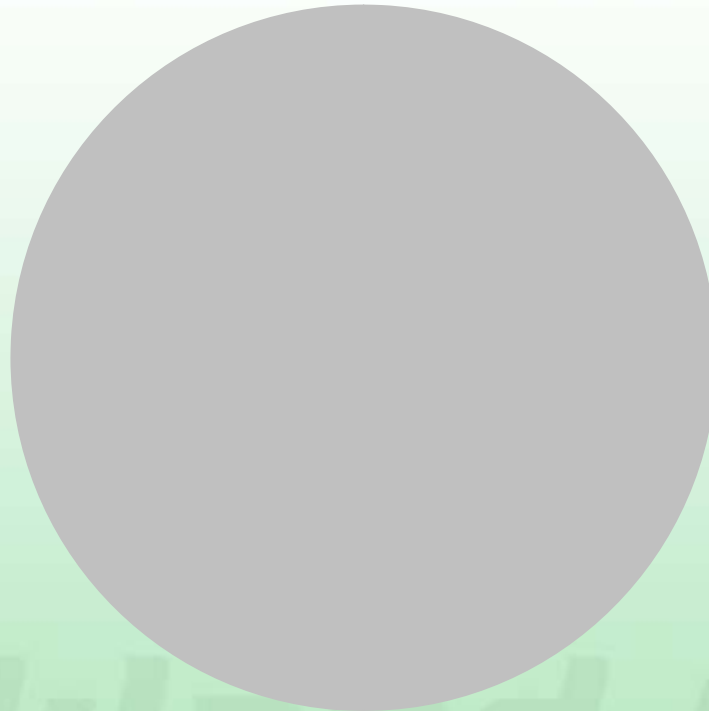
Resource Availability

In General, How is our time spent?

Availability = 7 Hours per Day / 35 Hours per Week

Allocation

- 7 Hours per Day or
35 Hours per Week

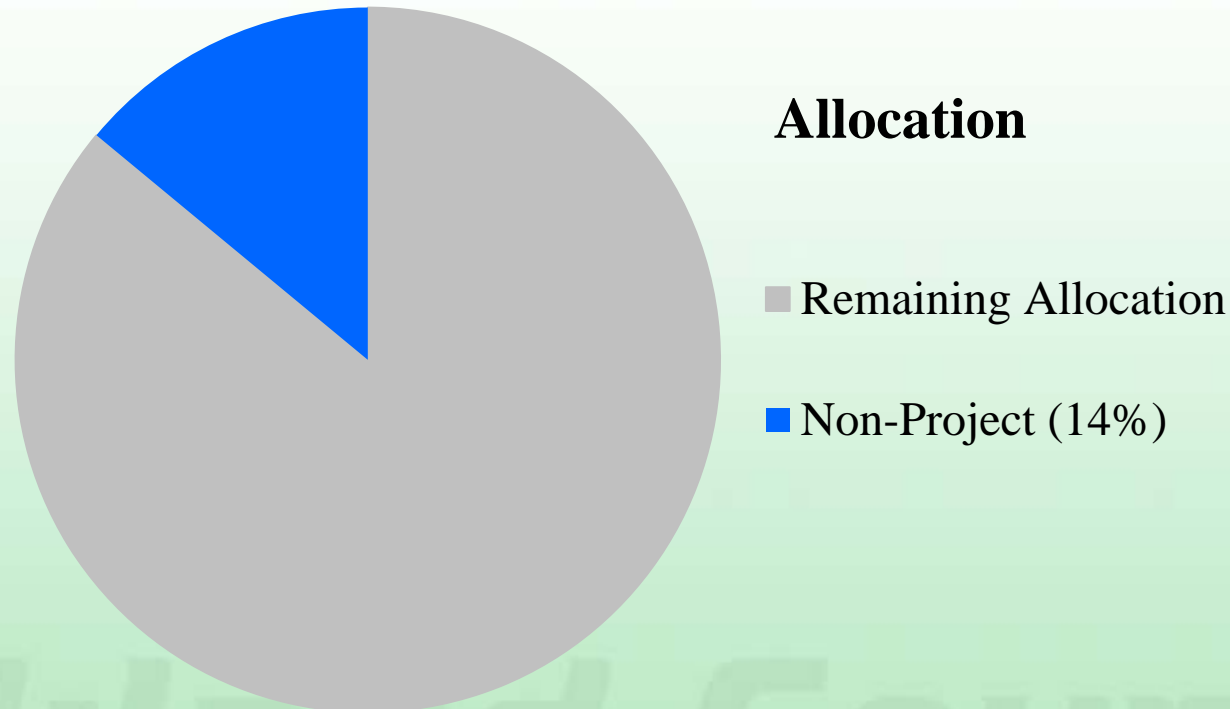


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Resource Availability

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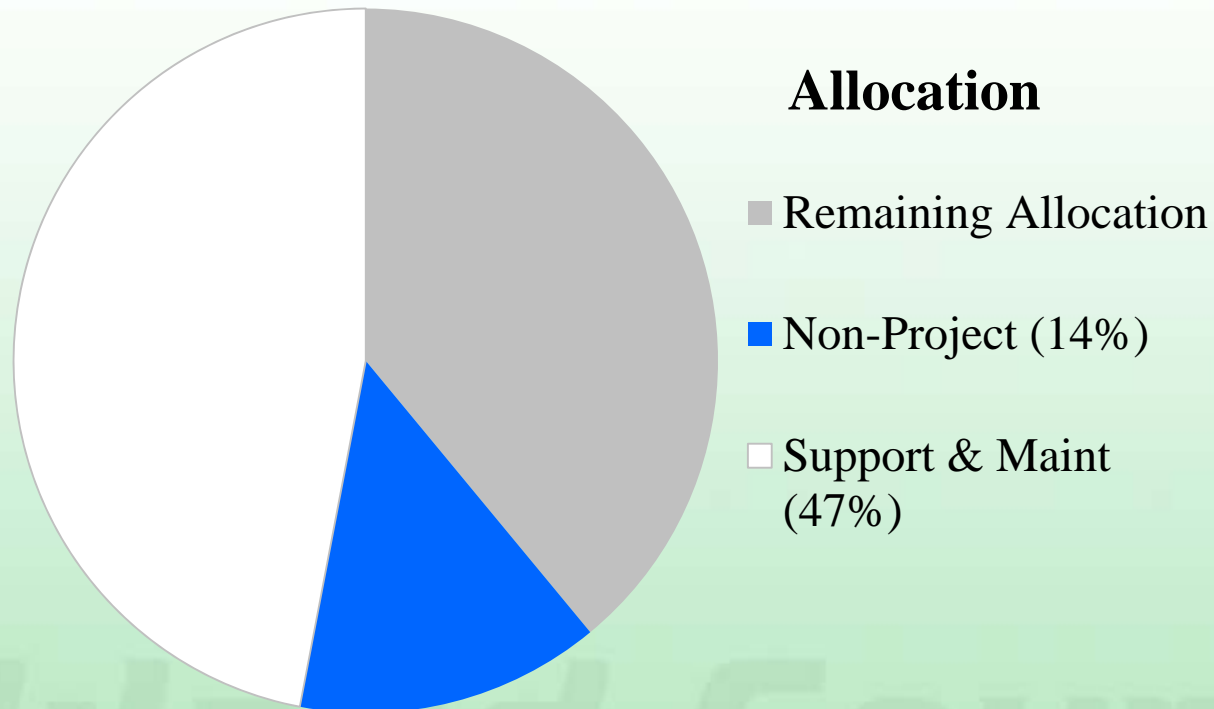
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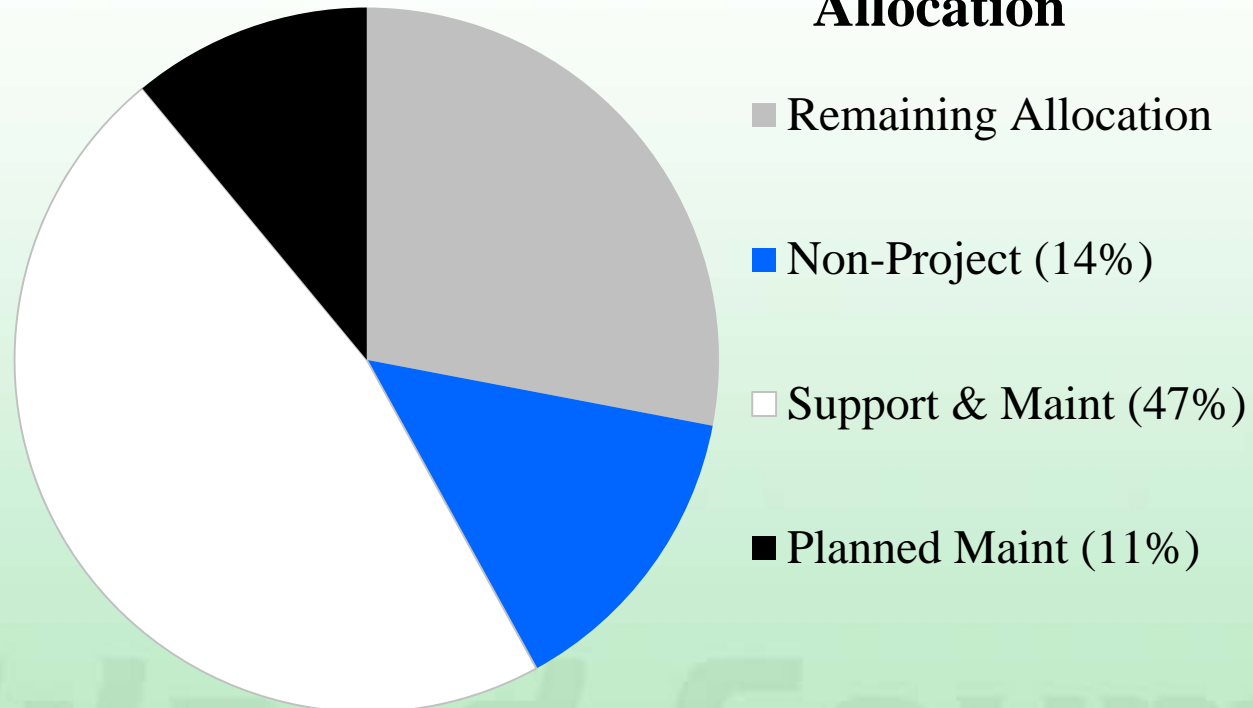


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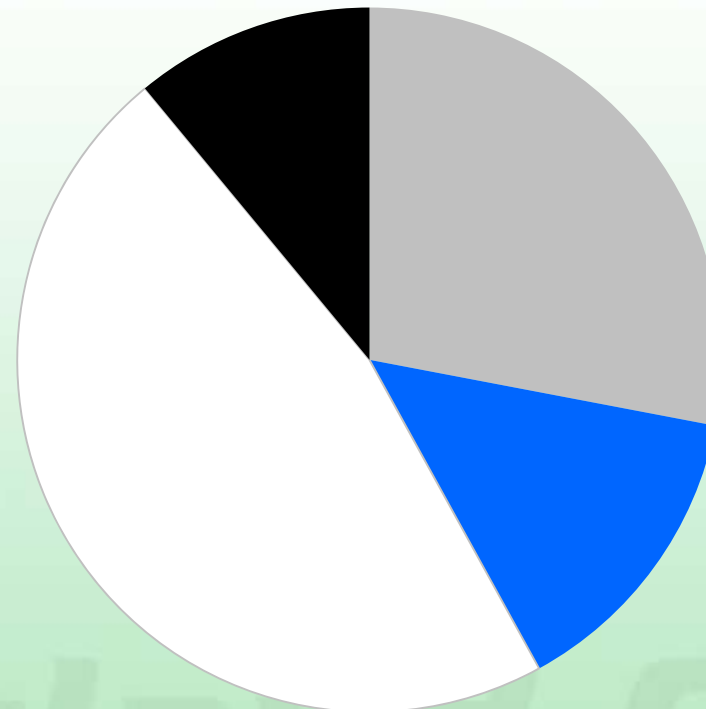
Allocation



Resource Availability

In General, How is our time spent?

Availability = 7 Hours per Day / 35 Hours per Week



Allocation

■ Remaining Allocation
(28%)

■ Non-Project (14%)

□ Support & Maint (47%)

■ Planned Maint (11%)

**28% = 2 Hours per Day / 10 Hours per Week
left for Enhancements/New Development**










Portlets Workloads

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- Why Allocation?
 - Allocation is similar to a baseline for resource commitment. Over time we can measure back against it.
 - Allocation does not fluctuate like ETC when projects are autoscheduled.
 - We have been defaulting to 100% allocation, so most plans are over allocated.
 - **It will take time to work towards cleaning up the allocations.**

Portlets

Resource/Role Allocation

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- Similar to Resource Utilization Detail
- Shows Allocation in Hours and Percent

Team Plans

- Default Allocation will be set to 0%
- Start by reducing the Allocation % to be close to the Total Usage
- Use the same process when adding resource to Team Plans

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Detail Project Plans

- Default Allocation will be set to 0%
- Must set an Allocation Segments when resource assignments fluctuate
 - When will the work start?
 - How long will it take?
 - What **percentage** of their time will the resource be spending on it?
- Must extend the segment if the work takes longer than planned

Budget Projects

- Default Allocation will be set to 0%
- Must set an Allocation Segment
 - When will the work start?
 - How long will it take?
 - What **percentage** of their time will the resource be spending on it?
- Must extend the segment if the work takes longer than planned

Process Changes

- Think in terms of hours/week instead of hours/day when allocating resources to projects
- Recommend setting Default Allocation Percent to the minimum amount needed
- Recommend setting Allocation in Clarity, not in Workbench
- Use Portlets as a tool to resolve over commitment
- Produce pdf of Resource Utilization Summary report (and Detail if needed) when submitting project to PMO for A&C
- Budget Projects will require Allocation Segments
- **PLEASE Provide Feedback to PMO.**

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How Will This Help Me?

- More realistic scheduling of resources
- More accurate project timeline
- Fewer date renegotiations
- User friendly portlets / easier to review
- Obtain resource availability / allocation more quickly
- Less time spent on resource negotiation

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Clarity Resource Management Questions

Time Tracking for this Workshop

- Project: Resource Utilization Process Improvement
- Task Name: Clarity Resource Management Workshop

Additional Questions



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