

MUX Staffing – Common Terms

The Staff grid allows allocation of resources and roles to your projects and to see their total availability. When you consider staffing a new project, the four key factors you need to consider are:

Availability This is the number of HOURS A RESOURCE IS ABLE TO WORK PER DAY determined by: organization's calendar • Hours per week over the course of the years	Allocation This is the number of HOURS A RESOURCE IS ABLE TO WORK ON A SPECIFIC PROJECT determined by: • Organization's calendar • Resource's start and finish date on the project	Assignment This is the ASSOCIATION OF A RESOURCE TO A TASK Estimate to Complete (ETC) This is the number of HOURS PLANNED TO COMPLETE EACH TASK determined by: • A resource's assignment to a specific task • The resource's allocation percent to the project	Actuals This is the WORK THAT HAS BEEN COMPLETED by resources on tasks Actual Work is posted to your project once the timesheets are approved by Resource Managers
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Term	Definition
Soft-book (Planned Allocation)	An allocation status indicating the Resource Manager or Project Manager has reserved the resource to work on a project but has not yet committed the resource to the project.
Hard-book	An allocation status indicating the Resource Manager has committed the resource to work on a project.
Mixed-book	An allocation status indicating when the Planned Allocation (soft book) and Hard booked do not match. Clarity PPM controls this setting.

Staffing – General Information

Default Allocation

The User Toolbar is in the top right-hand corner of the screen

- By default, Clarity PPM sets the allocation to either 0% (associated with no time) or 100% (“full-time” to this project).
- As a rule, PMs should adjust the default allocation to reflect the individual’s true allocation to the project.
- For resources where the nature of the work is not known, the allocation should be set to 0% until the allocation percent is known.
- Clarity PPM allows for over-allocation of resources and will alert you when a resource is overallocated (>100%).
- If there is not a named resource for a project, add a role as a place holder with a default allocation %.
- The same role can be added more than once to a project.
- Once the named resource is identified, perform a “Replace” to change the allocation from the role to named resource.

Allocation vs ETC

Allocation is set at the project staff level and is calculated by Clarity PPM as determined by:

- Allocation of the resource on the project.
- Hours the resource works per day (availability) set on their resources profile or thru the Resource’s calendar.
- Resource Calendar (non-workdays) – no working days entered on their calendar.
- Start and End dates the resource is set to work on the project – by default it is set to the project start and finish dates.

ETC (Estimate to Complete) is set at the task level determined by:

- The resource assigned, the task Start and Finish dates and the allocation during those task dates.
- ETC’s may be manually entered/adjusted to denote the specific hours the resource is planning to spend working on the task.

Staffing

Add Resource(s) to Staff

The Oakland County templates may add Roles to Staff.

There are two (2) ways to add Resources/Roles to an investment:

Use **Add**

1. To add Resource(s)
 - Confirm the Staff – Classic View displays
 - Click **Add (+)**
 - In the Resource column, start typing the Role or Resource name

The screenshot shows the 'Staff' tab selected in the top navigation bar. Below the tabs, there is a 'Add Staff' button. A 'Group By' dropdown is set to 'Resource *'. A search bar in the 'Resource' column contains the text 'smi'. A dropdown menu is open, displaying a list of resources with their roles and managers. The list includes:

Resource *	Role	Resource Manager
Smith, Brian	SMIB	Project Manager
Smith, Stu	SMST	Project Manager
Smith, Tom	SMIO	Programmer

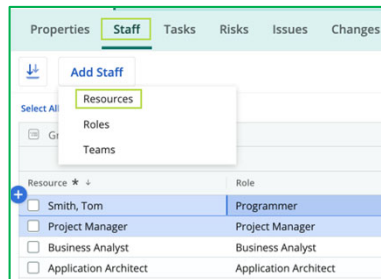
NOTE: If you type in a role name, the list will also display any resources aligned to that role.

Staffing

Add Resource(s) to Staff cont.

Use Add Staff

- To add Resource(s) to Staff
 - Confirm the Staff – Classic View displays
 - Click **Add Staff** and select Resources
 - Use **Search...** and/or **Filter** to find the Resource(s)
 - Click the checkbox next to each Resource
 - Click **Add**



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View

Standard View

▼

Select All

Deselect All

2 Items Selected

Add

Group By

Full Name ↑	Resource ID *	Primary Role	Manager	Person Type	Resource Type
<input type="checkbox"/> Aldred, Vickie	ALDV	Project Manager	Aldred, Vickie	Employee	Labor
<input type="checkbox"/> Aldred, Vickie	ALVI	Business Analyst	Jennings, Steve	Contractor	Labor
<input checked="" type="checkbox"/> Greenwalt, Daniel	GRED	Computer Syste...	Woods, Jerome	Contractor	Labor
<input checked="" type="checkbox"/> LakiReddy, Manjula	LAKM	Web System Ad...	Sager, Ed	Contractor	Labor
<input type="checkbox"/> Netapalli, Venkata Vikash Re	REDV	Business Analyst	Brinker, Janet	Contractor	Labor
<input type="checkbox"/> Reddy, Akhil	REDA	Programmer	Brinker, Janet	Contractor	Labor
<input type="checkbox"/> Vasireddy, Siddhartha	VASS	Programmer	Megge, Paul	Contractor	Labor
<input type="checkbox"/> zReddy, Niranjan	zREDN	Inactive IT	Administrator, Clarity	Employee	Labor

- Once the role/resource is added, update the allocation **Start Date**, **Finish Date**. If no Start/Finish date is defined, the system assumes it is the same Start/Finish Date as the investment.

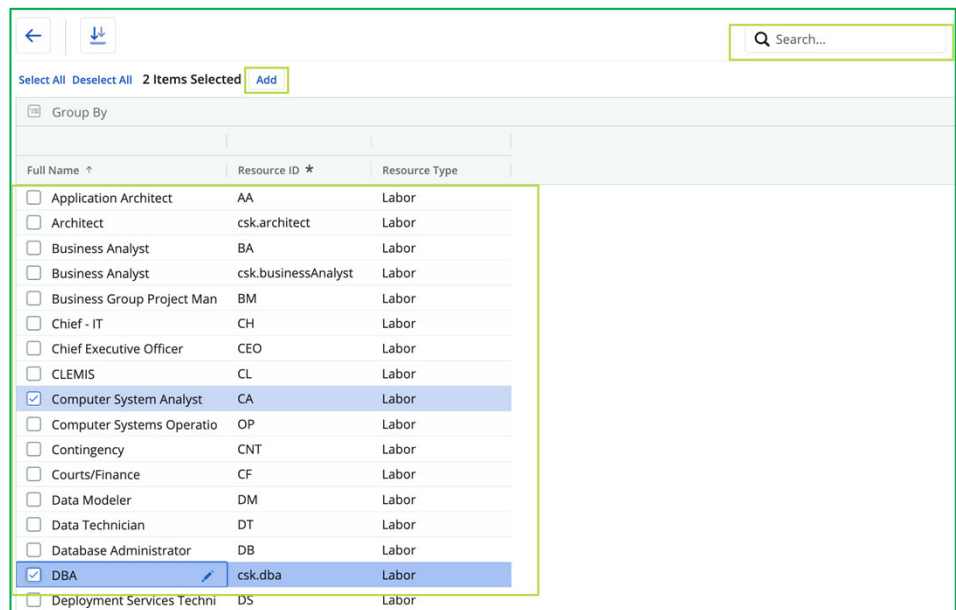
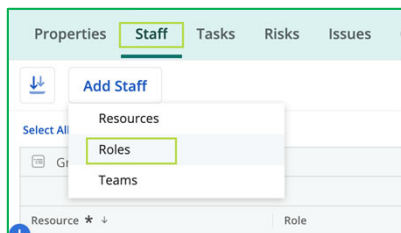
Group By							
Resource * ↓	Role	Resource Manager	Staff OBS Unit	Start	Finish	Default Allocation	Booking Stat
<input type="checkbox"/> Smith, Tom	Programmer	Brinker, Janet		Mar 1, 2024	Jul 1, 2024	50%	Soft
<input type="checkbox"/> Project Manager	Project Manager	Administrator, Clarity	IT Resource ... Resources			75%	Soft
<input type="checkbox"/> Lakireddy, Manjula	Web System Administrator	Sager, Ed			May 31, 20...	25%	Soft
<input type="checkbox"/> Greenwalt, Daniel	Computer Systems Operatio...	Woods, Jerome		Feb 1, 2024		30%	Soft
<input type="checkbox"/> Business Analyst	Business Analyst	Administrator, Clarity	IT Resource ... Resources			60%	Soft
<input type="checkbox"/> Application Architect	Application Architect	Administrator, Clarity	IT Resource ... Services			40%	Soft

Staffing

Add Role(s) to Staff cont.

Use Add Staff

- To add Resource(s) to Staff
 - Confirm the Staff – Classic View displays
 - Click **Add Staff** and select Roles
 - Use **Search...** and/or **Filter** to find the Resource(s)
 - Click the checkbox next to each Resource
 - Click **Add**



- Once the role is added, update the allocation **Start Date**, **Finish Date**. If no Start/Finish date is defined, the system assumes it is the same Start/Finish Date as the investment.

Group By							
Resource *	Role	Resource Manager	Staff OBS Unit	Start	Finish	Default Allocation	Booking Stat
<input type="checkbox"/> Smith, Tom	Programmer	Brinker, Janet		Mar 1, 2024	Jul 1, 2024	50%	Soft
<input type="checkbox"/> Project Manager	Project Manager	Administrator, Clarity	IT Resource ... Resources			75%	Soft
<input type="checkbox"/> Lakireddy, Manjula	Web System Administrator	Sager, Ed			May 31, 20...	25%	Soft
<input type="checkbox"/> Greenwalt, Daniel	Computer Systems Operatio...	Woods, Jerome		Feb 1, 2024		30%	Soft
<input type="checkbox"/> Business Analyst	Business Analyst	Administrator, Clarity	IT Resource ... Resources			60%	Soft
<input type="checkbox"/> Application Architect	Application Architect	Administrator, Clarity	IT Resource ... Services			40%	Soft

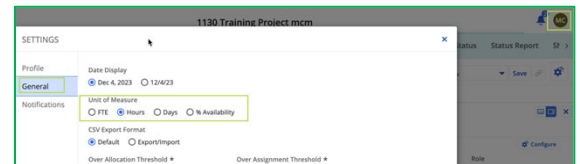
Staffing

Update Allocations

There are multiple ways to add Resources/Roles to an investment, however we will use Default Allocation % and the Details flyout:

Use **Default Allocation %**

- Allocation is a Flat percentage
 - Double-click the Default Allocation % for the resource
 - Type number (the number formats as percentage)
 - The percentage translates to either Days, Hours, % Availability or FTE depending on the Unit of Measure selected in Settings



Group By									
Resource *	Role	Resource Manager	ish	Default Allocation	Booking Status *	Op...	Baseline ...	Allocation	
<input checked="" type="checkbox"/> Smith, Tom	Programmer	Brinker, Janet	Jul 1, 2024	50	Soft	✓			
<input type="checkbox"/> Project Manager	Project Manager	Administrator, Clarity		75%	Soft	✓			1,
<input type="checkbox"/> Lakireddy, Manjula	Web System Administrator	Sager, Ed	ay 31, 20...	25%	Soft	✓			
<input type="checkbox"/> Greenwalt, Daniel	Computer Systems Operatio...	Woods, Jerome		30%	Soft	✓			
<input type="checkbox"/> Business Analyst	Business Analyst	Administrator, Clarity		60%	Soft	✓			
<input type="checkbox"/> Application Architect	Application Architect	Administrator, Clarity		40%	Soft	✓			6

2. Update Resource via Details fly-out

- Click in the Resource's row
- Click **Details**
- Update fields
- Click **Close**

Details

Conversations

Configure

Resource *

Smith, Tom

Role

Programmer

Resource Manager

Brinker, Janet

Staff OBS Unit

Start

Mar 1, 2024

Finish

Jul 1, 2024

Default Allocation

45

Booking Status *

Soft

Baseline Usage

Open for Time Entry

☒

Allocation

170.00

ETC

0.00

Actuals

0.00

Total Usage

0.00

Status *	Op...	Baseline ...	Allocation
✓			
✓			1,
✓			
✓			
✓			6