

		Mar 17, 2019		Mar 24, 2019			
FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST
							21.29
			0	17.35		0	
9.61	0	16.55	0	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
1.00	0.00	1.00	0.00	1.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
1.00	0.00	1.00	0.00	1.00	0.00	0.00	1.44
1.00	0.00	1.00	0.00	1.00	0.00	0.00	1.00
0.20	0.00	1.00	0.00	1.00	0.00	0.00	2.00
0.60	0.00	1.00	0.00	1.00	0.00	0.00	2.00
0.40	0.00	2.00	0.00	2.00	0.00	0.00	1.00
0.30	0.00	1.00	0.00	1.00	0.00	0.00	1.00
0.10	0.00	0.50	0.00	0.50	0.00	0.00	1.00
1.00	0.00	1.00	0.00	1.00	0.00	0.00	1.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Staffing

Pros and Cons of Staffing in the Modern UX

Introductions

Clarity PPM Staffing

SENIOR FUNCTIONAL CONSULTANT

STEPHEN DENNY

2011 - TODAY

About Me

Birmingham born and bred

Worked for BT for 30 years before joining Pemari in 2011

CIMA qualified

Worked with Clarity/Niku since 2001

Club Secretary and Finance Director of Alvechurch F.C.

West Bromwich Albion season ticket holder



Agenda

Staffing in the Modern UX

Session Agenda

Staffing in the Modern UX



Staffing Settings & Telescope Calendar

Manage Allocations by Resources

Manage Allocations by Investments

How to fulfil Staffing Requests

Staffing Settings & Telescope Calendar

Staffing in the Modern UX

Staffing Settings

As a resource manager or other user with access, you can personalize some of the following default settings

- The Start Period defines the first fiscal time period available to the telescope calendar and the resource management views. As a default, the start period is set to the current period.
- The Time Period Span Defines the time period spans available to the telescope calendar and the resource management views. You can select up to four different time spans with a combination of period types (weekly, monthly, quarterly, annual) for a total of 60 periods to display in the telescope window
- Unit of Measure defines the unit for measuring resource capacity and allocation (Hours or FTE) displayed on the resource management views.
- Decimal Display defines how many decimal units you want to display in the views view (none, 1 or 2).
- Currency defines the currency used for forecasting hourly rates displayed on the resource management views. You cannot change the default currency.
- The allocation thresholds defines the under and over allocation thresholds. The thresholds only apply to the Resources-to-Investments view.
 - Under-allocated (30 percent under 100 percent): The resource allocation is 30 percent less than available capacity. Under-allocated resources have positive remaining capacity.
 - Over-allocated (10 percent over 100 percent): The resource allocation exceeds available capacity by 10 percent. Over-allocated resources have negative remaining capacity.
- The heat map gradients appear in increments of 20 percent for remaining allocation amount or capacity (over or under). Over-allocated resources by a percentage greater than the over-allocated threshold percentage parameter appear red on the page. Under-allocated resources by a percentage greater than the under-allocated threshold percentage parameter appear green on the page.
 - Anything above the over-allocation threshold starts out as a pale red and the gradient gets darker the higher the number is over the threshold.
 - Anything below the under-allocation threshold starts out as a pale green and the gradient gets darker the lower the number is under the threshold.

SETTINGS [X]

PROFILE

GENERAL

STAFFING

REVERT TO DEFAULT SETTINGS

START PERIOD: Current Time Period →

TIME PERIOD SPAN:
Select a period type for each span. You can create a total of 60 time periods across all time period spans.

1: Monthly [24]

2: Optional []

3: Optional []

4: Optional []

UNIT OF MEASURE:
 FTE Hours

DECIMAL DISPLAY:
 0.00 0.0 0

CURRENCY:
EGBP

ALLOCATION THRESHOLD:
The Resources to Investments view determines the telescope gradient colors based on allocation data by resource. Set the gradient scale to indicate resources that need your attention over any time period. Hover over any color to see the threshold range.

HEAT MAP:
UNDER: [30%] OVER: [10%]
[Green gradient] [100%] [Red gradient]

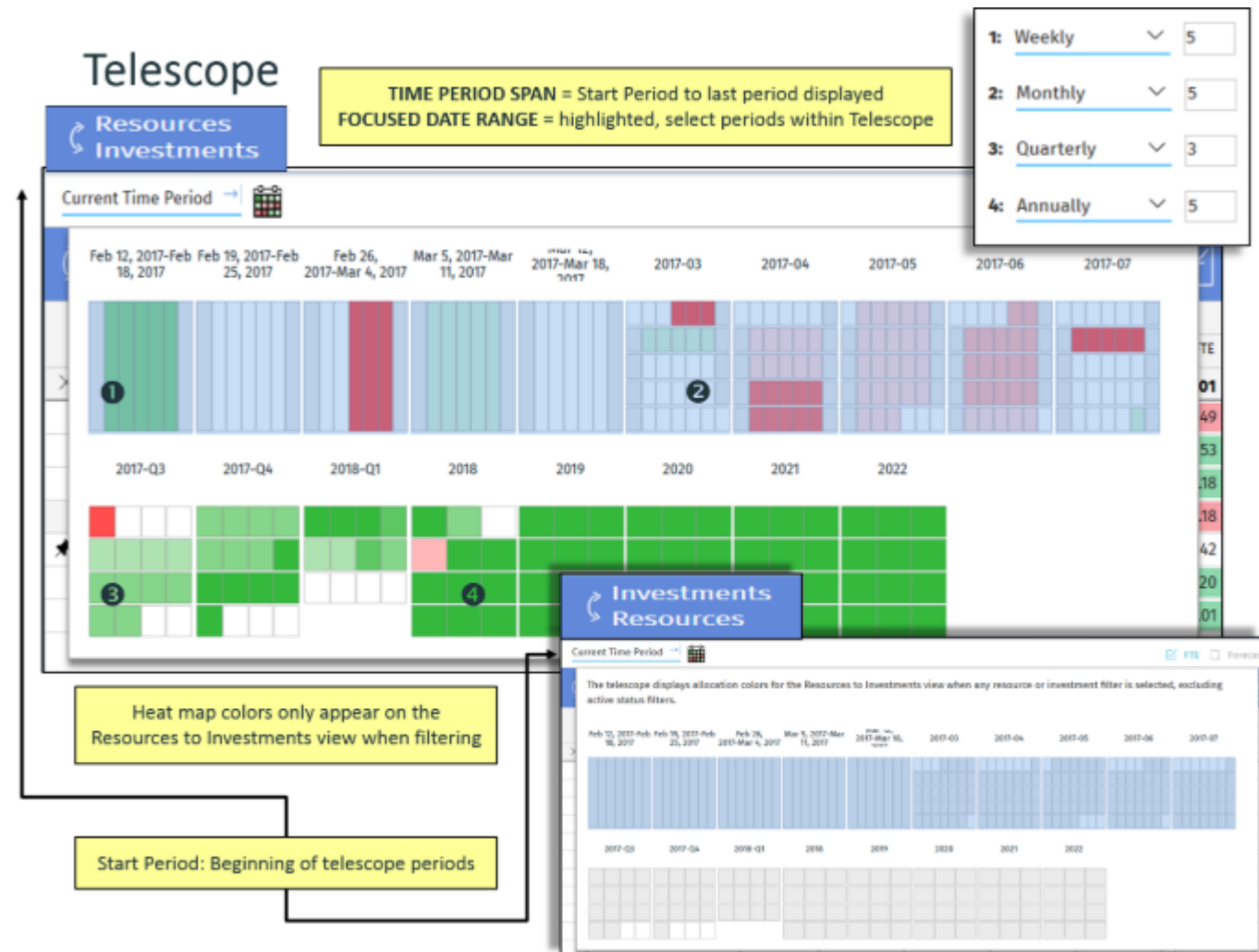
Staffing Telescope Calendar

Use the telescopic resource staffing calendar to get complete visibility into all investments for which the active team members are allocated

The resource staffing telescope calendar constitutes the following:

- **Telescope Window:** The total set of fiscal periods that appear in the telescope calendar. The telescope window is based on the Start Period and the Time Period Span (number and types of fiscal periods) that you select in the Resource Management settings. By default, the calendar displays 24 monthly fiscal periods.
- **Telescope Focus:** The fiscal periods in the telescope window that the resource manager has selected by highlighting the periods. Select a subset of fiscal periods in the telescope window to filter the periods that appear in the resource management views.

The attached image shows a sample telescope window that covers four different time period types. The calendar covers the first weekly start period through the last annual period. The telescope focus, indicated by the highlighted periods in the calendar, covers only February through September of 2017:



Manage Allocations by Resources

Staffing in the Modern UX

Resources-to-Investments

Lists resources at the parent level with their investment allocations at the child level


A primary responsibility of the resource manager is to balance the team capacity with incoming staffing requests.


The Resource-to-Investments view allows you to do the following tasks:

- See active investment allocations for resources that report to you.
- Set or edit default allocation % for resources. This new field is available on Resources to Investment View, Investment to Resources View and the Role Request view.
- View FTE (full-time equivalent) as a total based on all the allocations for each team member in the time periods grid. Forecast amounts and totals are also displayed for each team member next to the FTE values. The type and range of time periods on the view is displayed based on your selection in the telescope calendar.

Balance Resource Workload

Use the Resources-to-Investments view to manage resource allocations and balance out the workload.

Current Time Period → 

Resources Investments  Select Filters

	2017-03	2017-04	2017-05	2017-06
	FTE	FTE	FTE	FTE
✕ PINNED (2) ALL	2.00	2.00	2.00	2.00
★ ▼ Beth Roberts ⊕	2.00	2.00	2.00	2.00
ACME Phone Package 7.0 ✕	2.00	2.00	2.00	2.00
★ > Tony Trevino	0	0	0	0

Current Time Period → 

Resources Investments  Select Filters

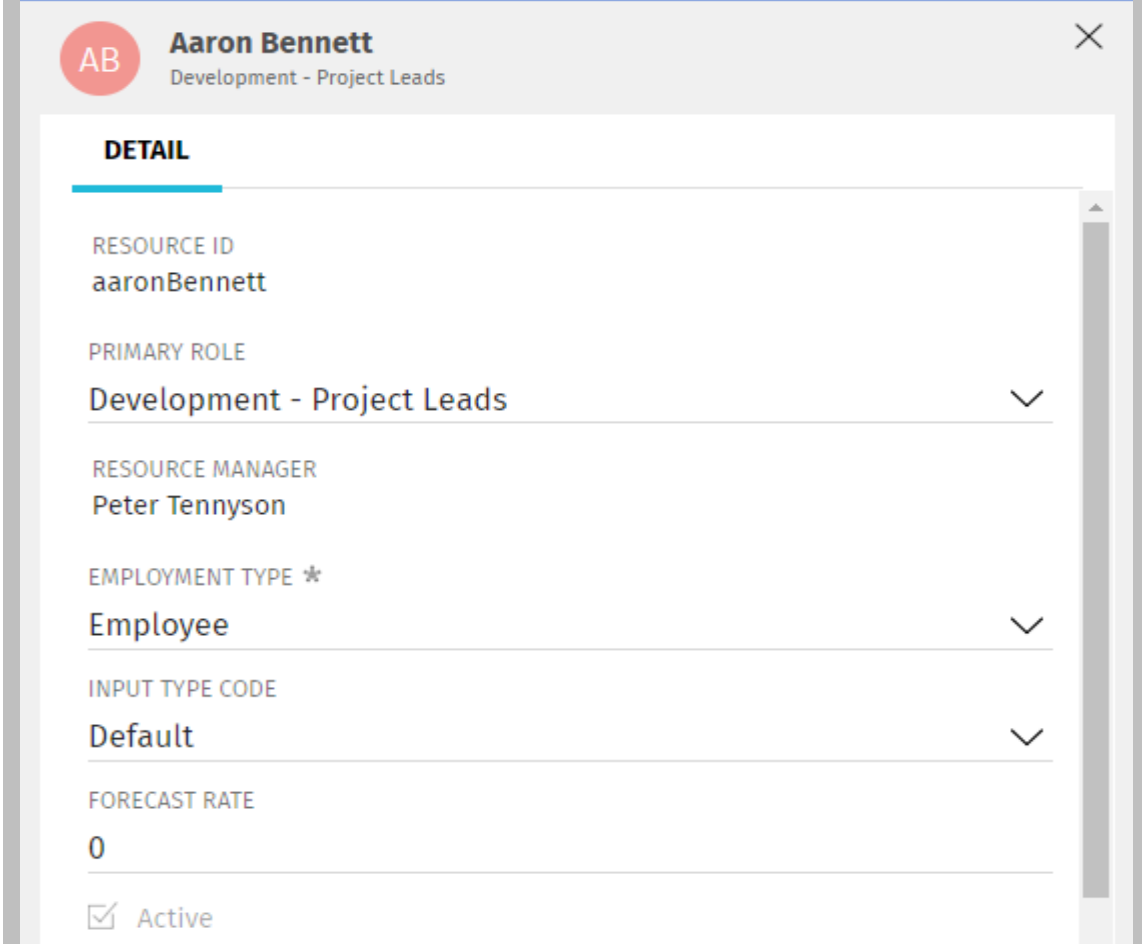
	2017-03	2017-04	2017-05	2017-06
	FTE	FTE	FTE	FTE
✕ PINNED (2) ALL	2.00	2.00	2.00	2.00
★ ▼ Beth Roberts ⊕	1.00	1.00	1.00	1.00
ACME Phone Package 7.0 ✕	1.00	1.00	1.00	1.00
★ ▼ Tony Trevino ⊕	1.00	1.00	1.00	1.00
ACME Phone Package 7.0 ✕	1.00	1.00	1.00	1.00

Edit Resource General Properties

You can view or edit the general properties for resources for which you have either view or edit rights.

On the Resources to Investments view, click a team member name to view the following details. If you have edit rights on the resource, you can edit some of the details. Some fields such as Resource ID, Resource Manager, and Active are read-only.

- **Primary Role**
Defines the primary role for the team member used for finding specific role-based resources.
- **Employment Type**
Categorizes the type of employment.
- **Input Type Code**
Categorizes the team member (billable or non-billable) so you can determine how to calculate the resource cost.
- **Forecast Rate**
Defines the hourly rate (forecast rate * allocated hours for the displayed time period) to calculate allocation forecast costs based on system currency. When adding an investment, the allocation forecast rate is populated with the resource forecast rate. You can override this rate at the investment level to apply a different rate for the specific allocation. If an existing allocation does not have a value, the value from the resource general properties is used.



The screenshot shows a modal window titled "Aaron Bennett" with a close button (X) in the top right corner. The window displays the following details for the resource:

- DETAIL** (Section Header)
- RESOURCE ID**: aaronBennett
- PRIMARY ROLE**: Development - Project Leads (with a dropdown arrow)
- RESOURCE MANAGER**: Peter Tennyson
- EMPLOYMENT TYPE ***: Employee (with a dropdown arrow)
- INPUT TYPE CODE**: Default (with a dropdown arrow)
- FORECAST RATE**: 0
- Active

Edit Resource Investment Allocation Properties

You can view or edit team allocation properties for investments for which you either have view or edit rights.

1. On the Resources to Investments view, expand a team member name.
2. Click an allocation name for the team member to display or update the following details. Some fields such as Investment and Investment Manager are read-only.
 - **Allocation Dates**
Defines the start and finish dates for the resource allocation for the investment. You can extend the allocation dates beyond the scheduled investment dates provided you have edit rights to the investment. If you only have view rights to the investment, then you can update the allocation dates only within the boundaries of the scheduled investment dates.
 - **Investment Role**
Defines the role for the allocation. The role is associated with the work for the investment allocation and can be different from the resource primary role.
 - **Forecast Rate**
Defines the hourly forecast rate for the specific allocation. Editing this field updates the forecast rate only for the specific allocation, not any other allocations. This value overrides the hourly forecast rate in the resource general properties.
 - **Booking Status.**
Defines the current booking status for the allocation. You must have hard booking rights for the resource to edit the allocation booking status.
3. Click Conversations to view, add, or respond to comments on the investment allocation.

AB **Aaron Bennett**
Anesthesia Delivery (PN1011)

DETAIL CONVERSATIONS

INVESTMENT
Anesthesia Delivery (PN1011)

INVESTMENT MANAGER
Peter Tennyson

ALLOCATION DATES

START DATE **FINISH DATE**
Aug 08 2017 May 08 2020

ALLOCATION %
100

INVESTMENT ROLE
Development - Project Leads

BOOKING STATUS *
Soft

FORECAST RATE

Open for Time Entry

Filter Resources-to-Investments View

Filter the view by resources, investments, or managers to view aggregated under or over allocations in the telescope calendar for this view

On the grid, the allocation data reflects the aggregated team totals with over and under allocation indicators for the new set of filtered resources.

We recommend that you filter the view on your initial login.

The changes are auto-saved and persist across all login sessions until you change them again.

Tip: You can search for a resource, by directly typing the resource name or id in the filter pane. You can type in a partial name or partial ID value to locate the desired lookup value.

The following filtering options are available on the Resources to Investments view:

The screenshot shows the 'Resources Investments' view interface. At the top left, there is a search bar with the placeholder text 'Search or filter...'. Below the search bar, there are several filter buttons: RESOURCE MANAGER, RESOURCE OBS, PRIMARY ROLE, EMPLOYMENT TYPE, RESOURCE, RESOURCE ACTIVE STATUS, INVESTMENT MANAGER, INVESTMENT OBS, and INVESTMENT TYPE. Below these, there are two more filter buttons: INVESTMENT and INVESTMENT ACTIVE STATUS. The main area displays a table with columns for resource names and various numerical values. The table has a 'PINNED (3)' header and a total value of 59.17. The rows are: Aaron Bennett (1.00, 1.00, 1.09, 2.00, 1.00, 1.00, 1.00, 1.14), Adam Benning (1.29, 1.29, 1.29, 1.29, 1.29, 1.29, 1.29, 1.29), and Adam Gray (0.00, 0.00, 0.09, 1.00, 1.00, 1.00, 1.00, 0.63). The table uses color coding: red for over-allocation and green for under-allocation.

Resources Investments		Search or filter...										59.17
PINNED (3)												
>	Aaron Bennett	1.00	1.00	1.09	2.00	1.00	1.00	1.00	1.00	1.00	1.14	
>	Adam Benning	1.29	1.29	1.29	1.29	1.29	1.29	1.29	1.29	1.29	1.29	
>	Adam Gray	0.00	0.00	0.09	1.00	1.00	1.00	1.00	1.00	1.00	0.63	

Pin Resources for Focused Workload Balancing

On the Resources to Investments views, you can pin resources to balance the work between two or more resources at a time

You can continue to filter and search for other resources without affecting the pinned resources.

The pinned resources remain and you can come back to them even after navigating away to other resource pages.

To pin a resource, click the push-pin icon next to a resource name on the All tab.

Click the Pinned tab to view your pinned resources.

To remove a resource from the Pinned tab, click the push-pin icon again.

You can pin up to a maximum of 200 parent records in the Resources to Investments and the Investments to Resources view.

Tip: When you are in the Pinned view, the Resource and Resource Manager filter options are not available. Your filters are auto-saved and persisted across all login sessions until you change them again. The results and the telescope in the Pinned tab are independent of the results and telescope in the All tab in the Resources to Investments view. Filtering within the Pinned tab allows you to view aggregated under and over allocations within the telescope calendar specific to the results on the tab within the view.

Change the Planning Horizon

To focus on a problem area, use the telescope calendar to select a different set of time periods

The allocation data on the Resources to Investments view changes to match the newly selected time periods in the calendar.

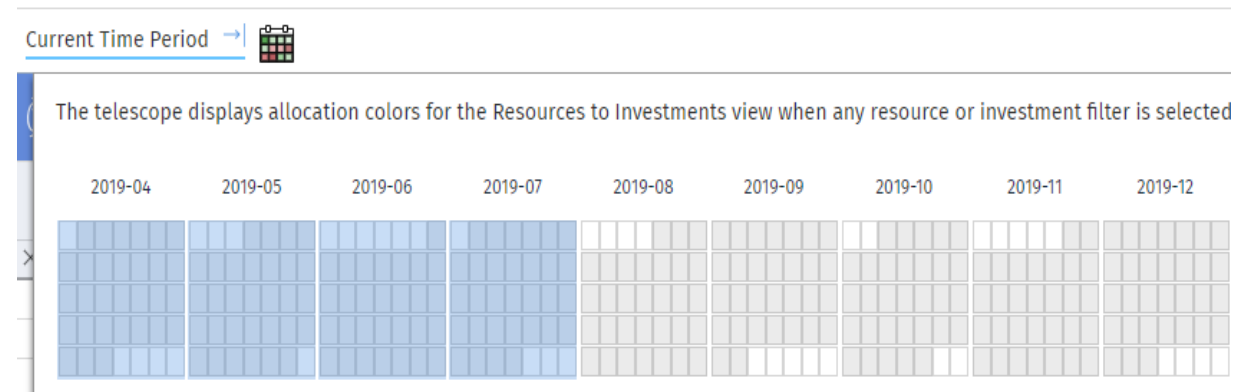
You can now balance the workload for the problem area.

For example, remove an allocation from an over allocated resource and reassign to a matching resource who is under-allocated.

Follow these steps:

- Click the telescope calendar (grid) icon at the top to open the calendar and select a different set of time periods.
- Click the date that appears before the grid icon to select a different start period for the telescope calendar.

By default, the start period for the telescope calendar is set to Current Time Period.



Manage Allocations by Investments

Staffing in the Modern UX

Investments-to-Resources View

Switch the Resources to Investments view to see allocation data that is grouped by investments

On this view, expand a parent investment to see the child resources and roles that are allocated to the investment.

Some of the allocation is soft-booked and is waiting for commitment.

The total allocation from the child resources and roles is summed up at the parent investment level.

Red coloring in the cells depict over allocation per resource or role that is allocated to the investment.

Investments-to-Resources View

From the Investments to Resources view, you can manage your allocations as follows:

- Edit existing resource or role allocation data on the fiscal time periods grid.
- Edit resource properties in the Details window. Click the resource name to view the details
- Remove allocations for a team member by expanding the parent investment and clicking the X next to the resource name.
- Edit an existing role allocation requested manager in the Details window. Click the role name to view the details
- Replace a role request with a named resource in the Details window. After you select a named resource, click Replace Allocation.
- Add role requests to investments. Expand the investment and search for the requested role.
- View, edit, or add conversations at the child row level. Click the resource or role name to open the Details window and click Conversations.

Clarity PPM

Current Time Period →



Investments
Resources

Search or filter...

			2019-04		2019-05		2019-06	
			FTE	FORECAST	FTE	FORECAST	FTE	FORECAST
×	PINNED (0)	ALL	287.68	149,600	225.38	156,400	200.00	136,000
√	A Collaboration Initiative ⊕		12.10	91,520	12.05	95,680	11.00	83,200
	Andy Cooper	×	1.10	28,160	1.10	29,440	1.00	25,600
	Arun Kumar	×	1.10	0.00	1.10	0.00	1.00	0.00
	Derrick Joseph	×	1.10	0.00	1.10	0.00	1.00	0.00
	Diane Durand	×	1.10	0.00	1.10	0.00	1.00	0.00
	Drew Davis	×						

Fulfil Staffing Requests

Staffing in the Modern UX

Requests View

Use the Requests view to fulfill or negotiate role staffing requests that your project coordinator submits

The Requests view displays a hierarchical list of incoming allocation requests grouped by the type of role for which you have soft or hard booking rights.

When you expand a role name, you see a list of investment allocations requested for that role.

You might see multiple instances of the same investment grouped within a role name as roles can be allocated to an investment multiple times.

Investments that are soft-booked show a blue shading versus investments that are hard booked show no shading.

Requests	Select Filters					
	2017-02	2017-03	2017-04	2017-05	2017-06	TOTALS
	FTE	FTE	FTE	FTE	FTE	FTE
	139.13	112.20	104.78	93.80	79.93	77.70
> Architect	14.50	13.57	13.63	10.46	7.98	9.09
> Business Analyst	26.53	22.53	22.25	20.66	16.52	15.07
▼ DBA	4.20	4.20	4.20	3.68	0.20	1.47
Fixed Assets	0.20	0.20	0.20	0.20	0.20	0.20
SAP HR Application 1	1.00	1.00	1.00	0.87		0.32
SAP HR Application 1	3.00	3.00	3.00	2.61		0.95
> Developer						7.90

Annotations:

- multiple instances of the DBA role on the same investment (points to the two SAP HR Application 1 rows under DBA)
- allocations aggregated at the parent role level (points to the DBA row)

Replace Roles with Named Resources

Use the Requests view to fulfill or negotiate role staffing requests that your project coordinator submits

To replace a role, verify that the following conditions apply:

- You have investment view rights combined with hard booking rights on the roles. Or, you have investment edit rights combined with soft or hard booking rights on the roles.
- You have soft or hard booking rights on the named resources that you can select from to replace the roles.
- The selected named resource is not already assigned to the investment.
- You cannot change the allocation amounts (FTE or Hours) for roles on the Requests view. Use the Investments to Resources view to edit role allocation amounts.

Note! The role replacement is a one-for-one replacement.

Request Allocation Properties

Edit any details as required

The following fields require an explanation:

- **Allocation Dates**
Defines the allocation start and finish dates for the investment. You can extend the allocation dates beyond the scheduled investment dates provided you have edit rights to the investment. If you only have view rights to the investment and you have hard booking rights on the role, then you can update the allocation dates only within the boundaries of the scheduled investment dates.
- **Allocation %**
Defines the default allocation for the role/resource allocated to an investment. You can change the allocation for a particular time period grid by editing it inline or setting a value manually from the Detail pane of the role allocated to the investment.
- **Forecast Rate**
Defines the hourly forecast rate for the investment allocation. Editing this field only updates the forecast rate on the specific allocation, not on any other allocations. This amount is used as a requested rate and is not carried over with the role replacement.
- **Role Request**
Defines a free-form field that you can update to describe the request(s). You can differentiate multiple instances of the same role requested on a single investment. For example, add DBA three times to one investment. You can update each one to be Sr. DBA, DBA, Jr., or DBA - Intern.
- **Resource Manager**
Defines the requested resource manager name. To reassign this staffing request, search for and select a different resource manager.
- **Allocate To**
Defines the named resource that is allocated to the investment to replace the requested role. You can select from a list of suggested resources for who you have soft or hard booking rights. If a primary role is defined for a resource, then you can also see the primary role next to the resource name.

Click the drop-down list next to the requested role and select a named resource to replace the role. You can enter the role name to find resources with a matching primary role.

Click Replace Allocation to confirm the selected resource as the role replacement.

Development - Engineers
Centricity (PN1005)

DETAIL CONVERSATIONS

INVESTMENT
Centricity (PN1005)

INVESTMENT MANAGER
Peter Tennyson

ALLOCATION DATES

START DATE	FINISH DATE
Jul 12 2017	Mar 04 2020

ALLOCATION %
100

FORECAST RATE

ROLE REQUEST
Development - Engineers

RESOURCE MANAGER
Search...

ALLOCATE TO
Development - Engineers

CONFIRM ALLOCATION

Filter Requests

As a default, all active role requests for which you have booking rights appear in the view

To use specific filters available on the Requests View, follow these steps:

- **Resource Manager**
Select one or more resource manager(s) that has been requested to fulfill role requests. All requests assigned to the selected resource manager(s) appear in the view. This lookup is dynamically populated with a list of requested resource managers on requested roles for which you have booking rights. If the lookup is empty or does not display your name, you do not have any outstanding role requests.
- **Role**
Select one or more role name(s). The selected role appears in the view. This is the type of role requested. The actual name of a Role Request might be different than the role name.
- **Role Active Status**
Select the activity status for roles for which you have booking rights. All role requests for the selected activity status (for example, Inactive) appears in the view. By default only active roles appear in the view. To view inactive role requests, use this filter option. This is single select filter.
- **Investment Manager**
Select one or multiple investment manager for the investments allocated to the roles requests. All requests for the allocations for the selected investment manager appear in the view.
- **Investment Type**
Select one or more values to filter role requests based on investment type.
- **Investment**
Select investment(s) for which allocations are requested. All role requests for the selected investments appear in the view.
- **Investment Active Status**
Select the activity status for investments for which allocations are requested. All role requests for the selected investment status (for example, Inactive) investments associated with the requested roles appears in the view. By default, both active and inactive investment allocations appear in the view.

The screenshot shows the 'Requests' view interface. At the top, there is a 'Requests' header and a search bar with the text 'Development - Engineers' and a placeholder 'Search or filter...'. Below the search bar are several filter buttons: 'RESOURCE MANAGER', 'ROLE ACTIVE STATUS', 'INVESTMENT MANAGER', 'INVESTMENT TYPE', 'INVESTMENT', and 'INVESTMENT ACTIVE STATUS'. The main area displays a table with columns for various metrics. The table has a header row with values 6.00, 0, 6.00, 0, 6.00. The first data row is expanded to show 'Development - Engineers' with a total of 6.00. Below this are rows for 'Centricity', 'Critical Care Vent - home versi...', and 'Defibrillator Improvements', each with a value of 1.00.

	6.00	0	6.00	0	6.00
Development - Engineers	6.00	0.00	6.00	0.00	6.00
Centricity	1.00	0.00	1.00	0.00	1.00
Critical Care Vent - home versi...	1.00	0.00	1.00	0.00	1.00
Defibrillator Improvements	1.00	0.00	1.00	0.00	1.00

Staffing Pros & Cons

Staffing in the Modern UX

Staffing in the New UX

Pros

- Staffing data all on one screen – simplifies RM process
- Ease of use, modern look and feel
- Telescope adds great value
- Time Period span and multiple types facilitates short/medium/long term planning
- Conversations are a good way of communicating with Resource Managers
- Able to add 'Teams'
- No Requisitions (Got to be a Pro?)
- No Mixed Bookings (Pro or Con?)

Cons

- Resource data sorted by First name, not Surname
- No Days option for Units of Measure in Settings
- Unable to save multiple filters
- Difficult to see 'availability' and 'remaining allocation'
- No notifications sent for requests
- Unable to maximise 'Requests' view
- No 'Request Status' to search 'open' requests
- No Staff OBS for Requests
- Allocate To should default to resources with requested role as primary role
- No similar view of Resource Planning portlets
 - Capacity
 - Organizational Demand (OBS)
- No Capacity Overview

Questions?

Staffing in the Modern UX

Thank you for attending

Staffing in the Modern UX



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Let us know how we can
improve!
Don't forget to fill out the
feedback forms!