Managing Projects with Clarity PPM

Version 15.8.1

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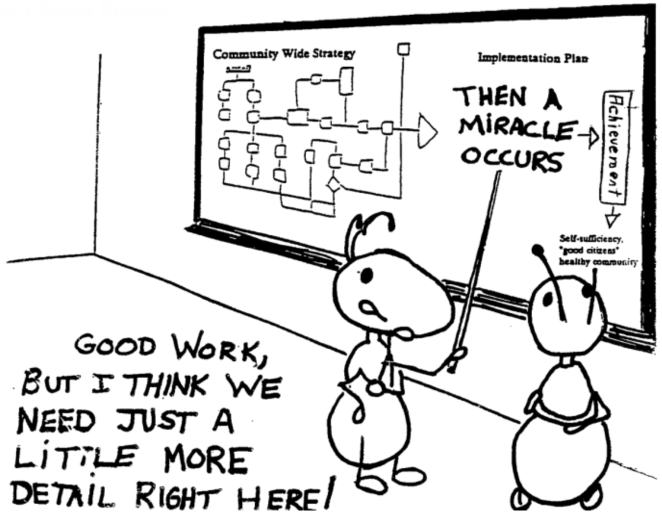
Agenda

- Project Management Overview
- Accessing Clarity PPM
- Accessing Projects
- Staff the Team
- Work Breakdown Structure (WBS) & Tasks
- Resource Assignments to Tasks
- Controlling a Project
- Risks, Issues, Change Requests, and Key Decisions
- Financial Management
- Portlets and Reports
- Closing a Project

Part 1: Project Management Overview

Clarity PPM Project Management

- Projects are temporary endeavors undertaken to create a unique product, service or result
  - Key elements are tasks and staff
    - Tasks define project work
    - Staff are the resources who perform tasks
    - Document and manage Risks, Issues and Change Requests
- Top Project Constraints are time, budget, and resources
  - Clarity PPM lets you manage each constraint
    - Determine project schedule
    - Determine cost based on resource estimated planned work and actual hours (Timesheets)



- Clarity PPM has the flexibility to manage your project throughout the project life cycle, adapting to changes, risks and issues proactively to minimize the impact to the project constraints
- To manage detailed project schedules on a daily basis.
  - Use Clarity PPM Gantt or MS Project (MSP)

Project Management Terms and Definitions

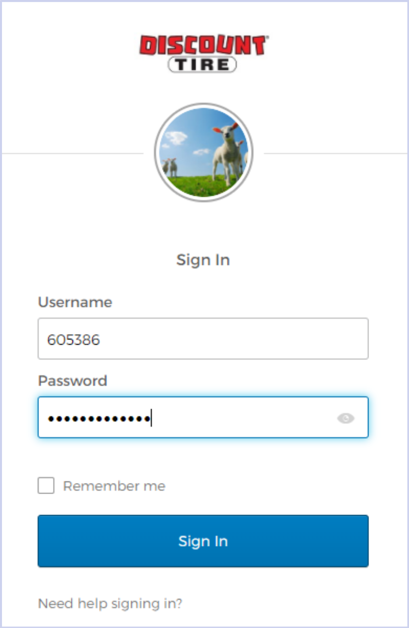
TERMS OF USE

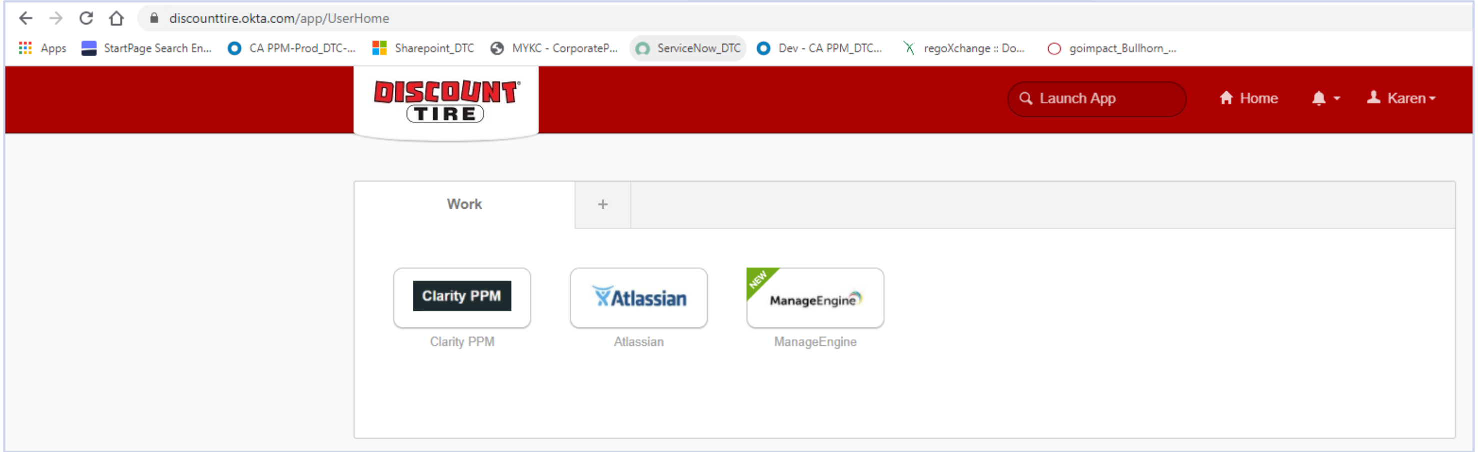
Term	Definition
NPIO – Non Project Investment Object	Enables an organization to expand beyond the standard projects to capture all items that require effort and that must be tracked. These NPIO's are applications, assets, products, other work, ideas and services.
Investment	Generic term for projects, programs, applications, assets, products, ideas, services and other work in Clarity PPM
Organizational Breakdown Structures (OBS)	Defines hierarchical roll-ups to enable the grouping of projects by data such as; Divisions, Department, etc. All investments and resources in Clarity PPM are tied to an OBS.
Resources	Labor (persons) and/or non-labor (expenses, equipment or materials)
Team (Role)	A generic placeholder (for example: business analyst) used until a named resource can be located to replace the role.
Work Breakdown Structure	A hierarchical decomposition of the work necessary to complete the objective. Normally broken down into levels that include sets of activities, tasks and milestones.
Estimate to Complete (ETC)	Hours or work required for a resource to complete a task. Each resource on a task may have a different ETC. The task ETC is the total hours for all resources to complete their work on the task.
Scheduling	The refining of a project's Work Breakdown Structure based on dependencies, resources , task ETC's or task constraints. Clarity PPM Gantt or Microsoft Project (MSP).

Part 2: Accessing Clarity PPM

Accessing Clarity PPM

1. Navigate to Clarity PPM via SSO (Okta)
2. Enter your employee ID as your user name and Windows password
3. Click Sign in
4. Then on Apps page, click on Clarity PPM icon

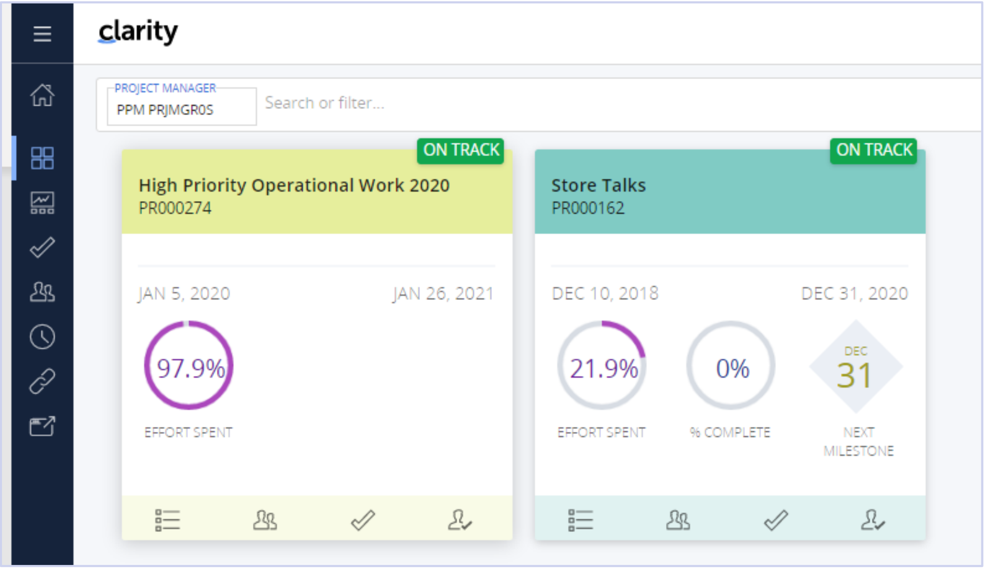




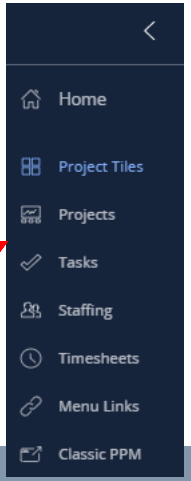
Differences - New UI vs Phoenix (Classic) View

Some key differences between the New UI vs. Phoenix view

- **New UI**
  - Home screen automatically opens to the Project Tiles view
  - Several icons will appear in the left navigation panel - Icons
    - Home
    - Projects – Tiles
    - Projects – List
    - Tasks
    - Staffing
    - Timesheets
    - Menu Links
    - Classic Clarity PPM (Phoenix View)



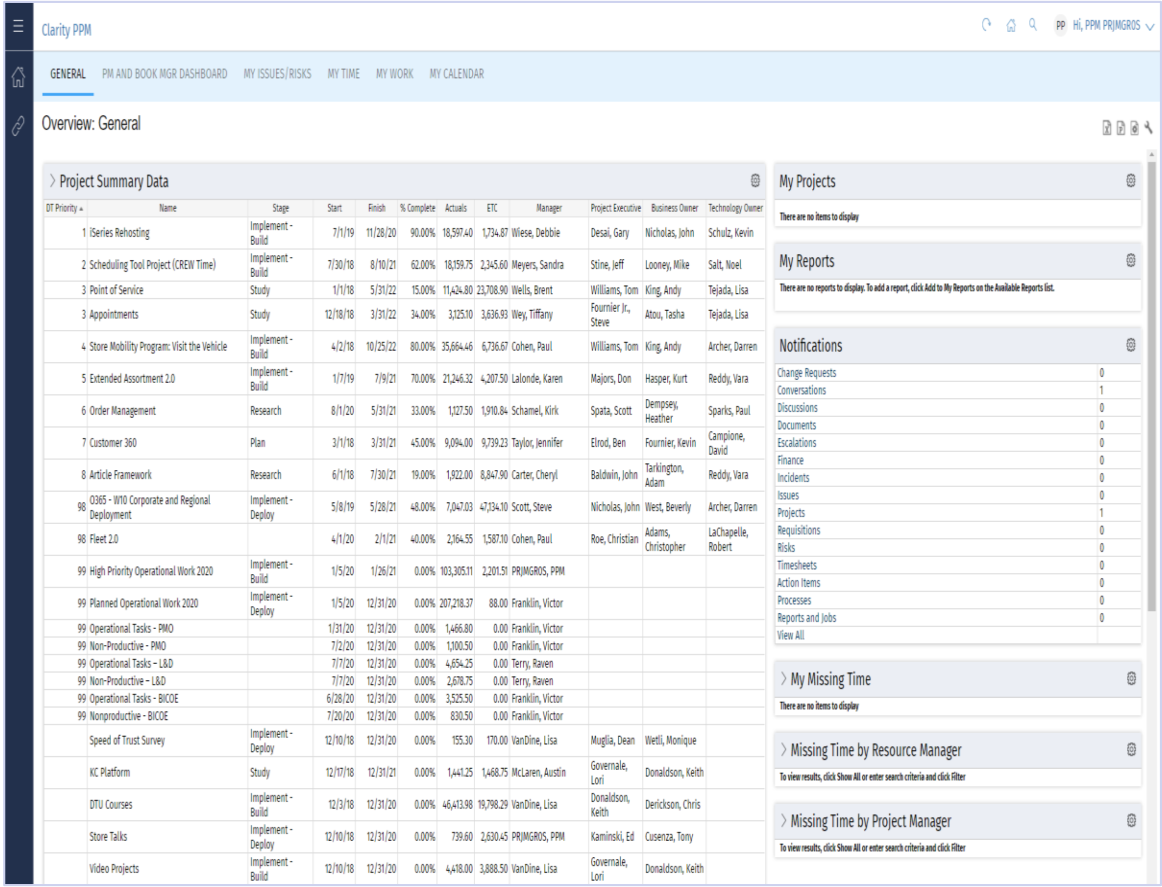
There is one additional icon on the top left of the page: When you click on this icon, it will expand the left navigation and show the icon plus a word description of the corresponding icon



Differences - New UI vs Phoenix View

Some key differences between the New UI vs. Phoenix view

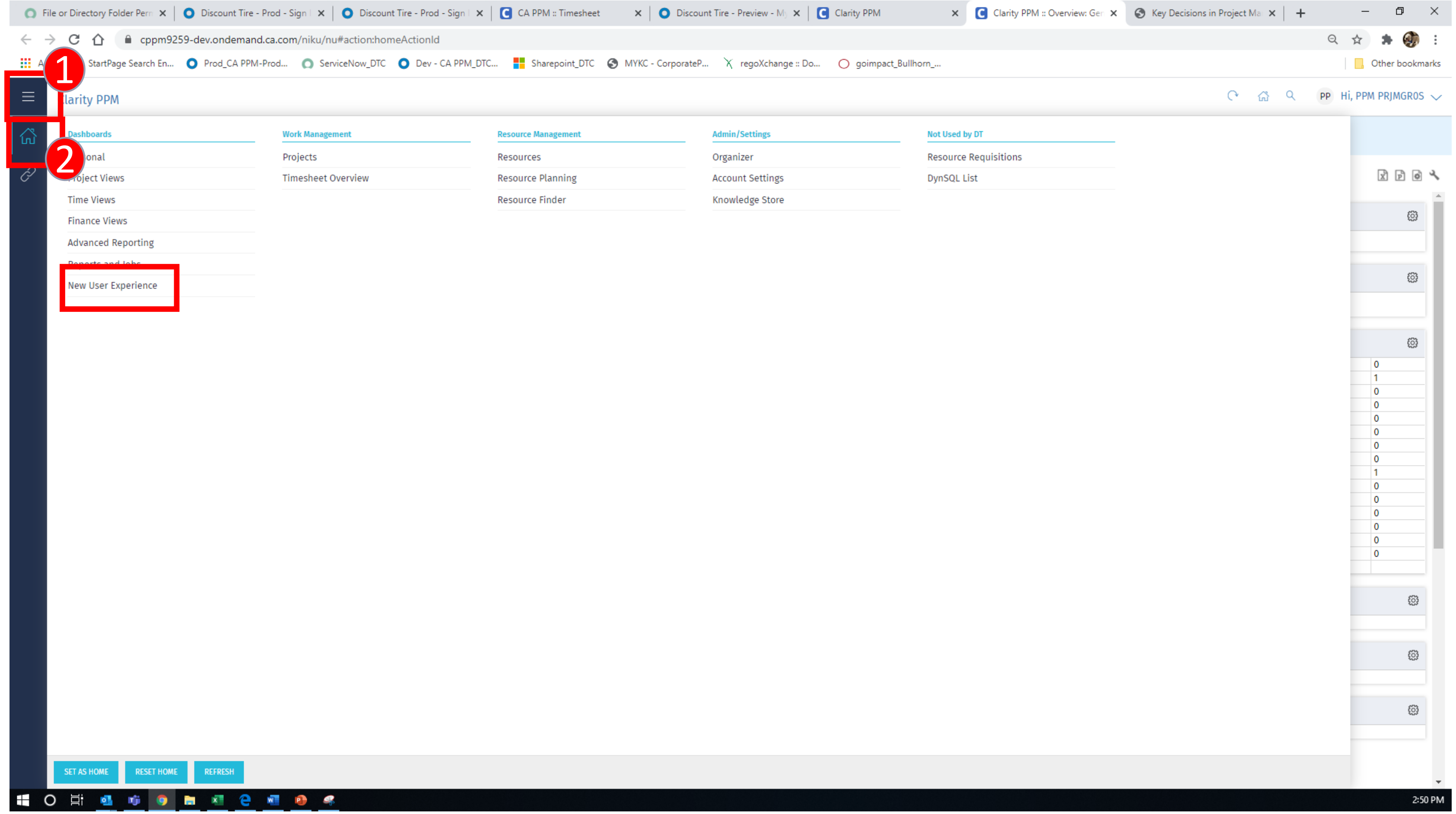
- **Phoenix view**
  - Looks much like the Classic view as currently used
  - Only 3 icons on the left navigation panel
  - Icons will appear in the left navigation panel
    - Expand navigation panel 
    - Home 
    - Menu Links 



Differences - New UI vs Phoenix View

Some key differences between the New UI vs. Phoenix view

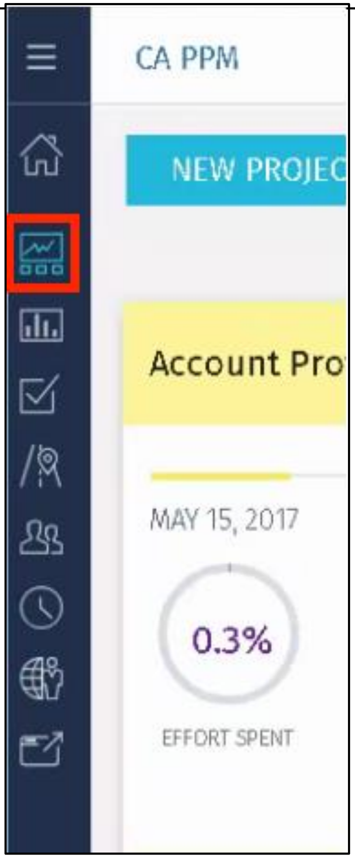
- **Phoenix view**
    1. Expand the left navigation panel with the top icon, same as in the New UI
    2. Hover over the home icon and it will show you the New User Experience link under Dashboards to go back to the New UI



Part 3:
Accessing Projects

Accessing Projects

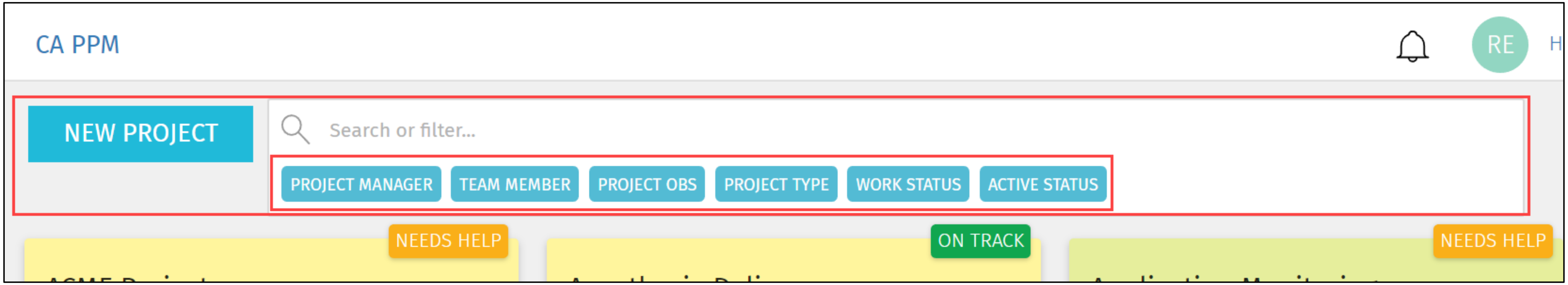
1. Access Projects in the New UX.
   - Click the Projects link.



Note: The links you see in the Left Navigation Menu may differ from what is shown in the screenshot.

Projects View

- By default, all projects to which you have access will display in the list. Use the filter to narrow down the list of projects.
- You may wish to filter for the projects for which you are the Project Manager.
- Typing directly in the search bar will filter the projects by Project Name.

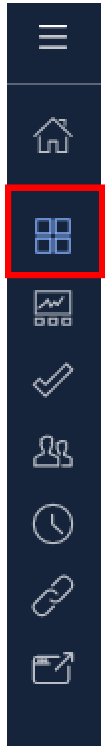


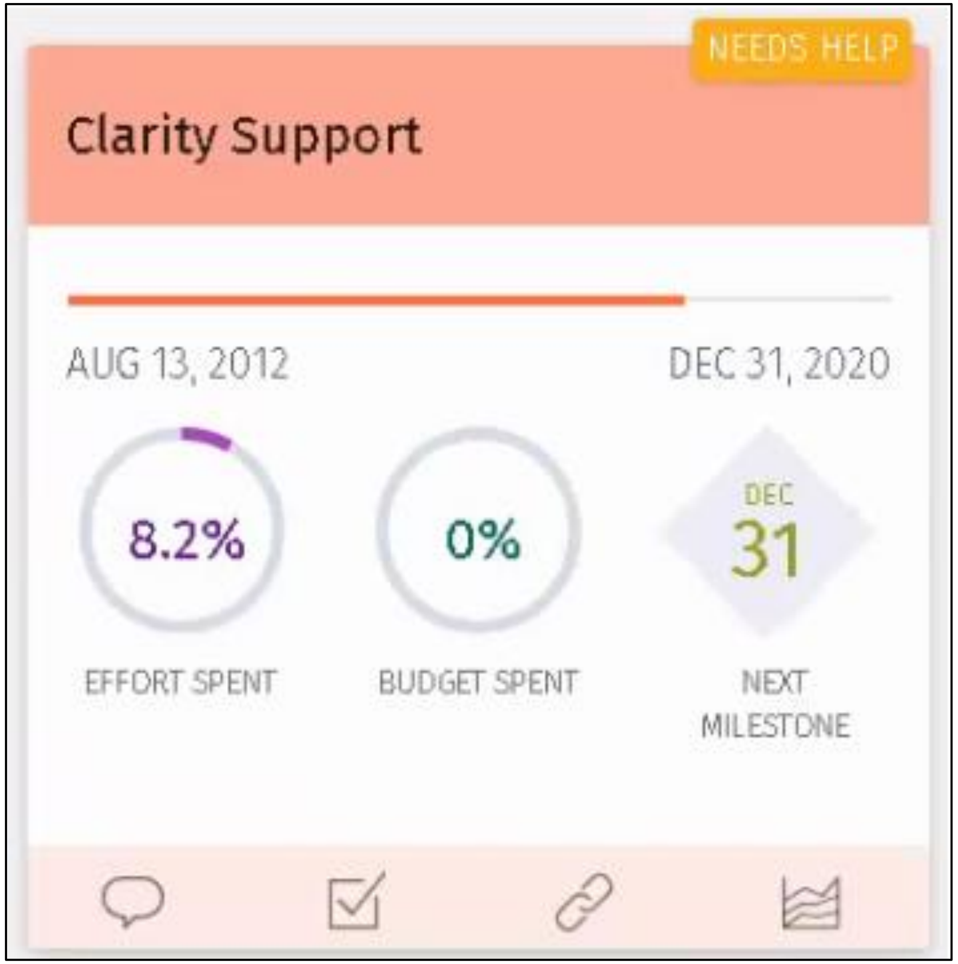
The Project Tile

- Information displayed on the project tile is driven by project information.

- Tile View is the Default and can be accessed using the Tile Icon on the left navigation panel

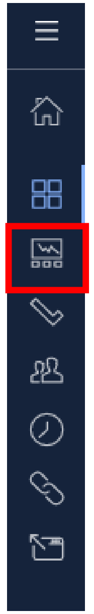
- Click the Tile to access the project.
  - Use the icons at the bottom to jump directly to a specific tab

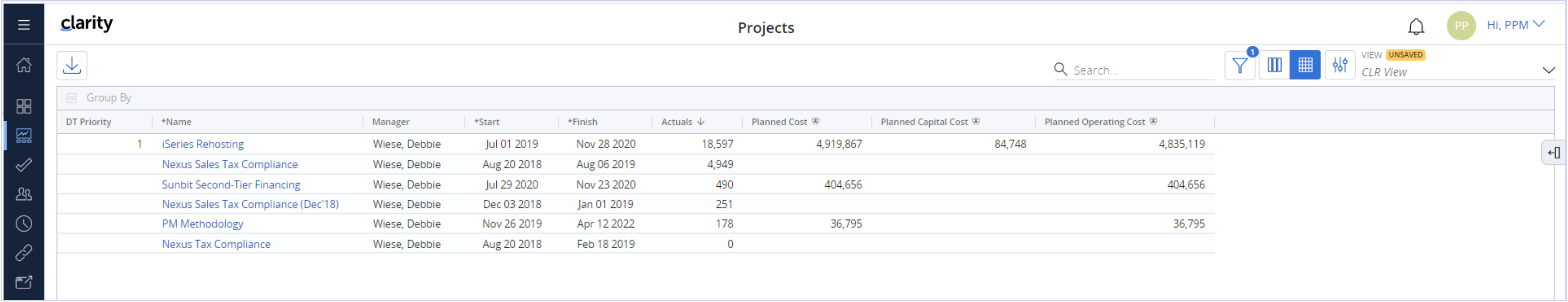




The Project List

- You may also view Projects in List View
- Click the Project Name to access the project.





Part 4:
Staff the Team

Four (4) “A”s of Resource Management

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

Resource Allocation

- By default, Clarity PPM sets the allocation to 100% which indicates that the resource is working “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 roles where the nature of the work is not known the allocation should be set to 0% until the allocation percent is known

- Clarity PPM does allow for over-allocation of resources and will alert you if a resource is overallocated (> than 100%)

- RMs and PMs must carefully monitor individuals’ resource allocations and task assignments to make sure resources are not assigned to more work than they can handle

Resource Allocation vs. ETC

It is important to know the differences between Allocation and Estimate to Complete (ETC)

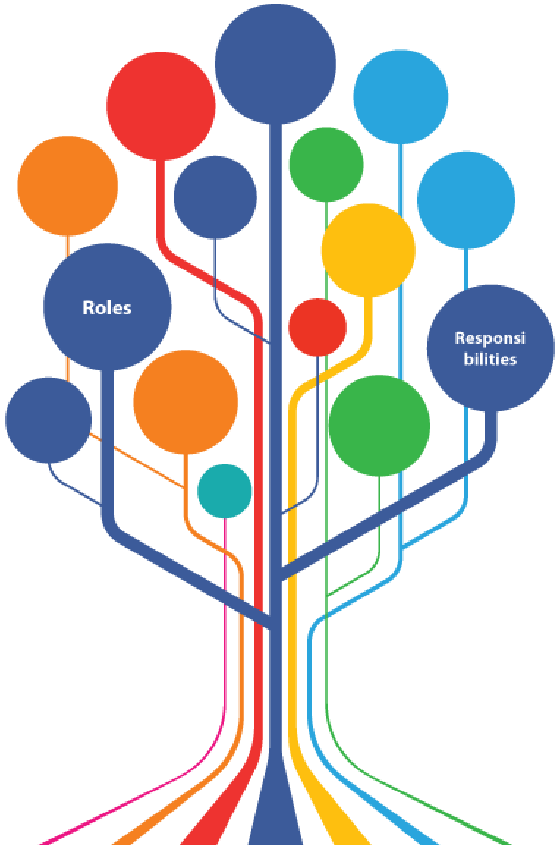
- Allocation is set at the project team level and is calculated by Clarity PPM as determined by:
  - Percent Allocation the resource is set on the project
  - Hours the resource works per day (availability) set on their resource profile
  - Resource Calendar (non-work days) – days the resource has entered on their calendar
  - Start and End date the resource is set to work on the project – by default is the project start and finish dates

- ETC is set at the task level determined by:
  - Initially by a portion of the allocation based on Start and Finish dates of the task
  - Manually entered value to denote the specific hours the resource will work on the task

Typical Allocation Roles and Responsibilities

Project Manager (PM)

- Identify resource needs to support project work demand
- Ensure the Resource Manager approves needed resource time amount
- Provide a rolling forecast of resource needs
- Perform timely reviews of resource needs versus allocations
- Communicate resource changes/issues/risks with Resource and/or Booking Manager

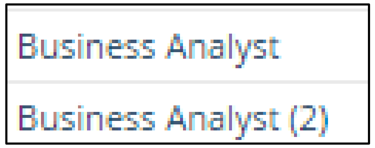


Resource and/or Booking Manager (RM)

- Monitor resources' project allocations and manage non-project allocations
- Perform regular reviews of resource allocation
- Approve Timesheets
- Communicate resource changes/issues/risks with PMs

Adding Roles (Team)

- If you do not have a named resource for a project, you can add a role as a place holder
- You can add the same role more than once to a project (for example, if the project requires two Business Analysts they will display as follows:



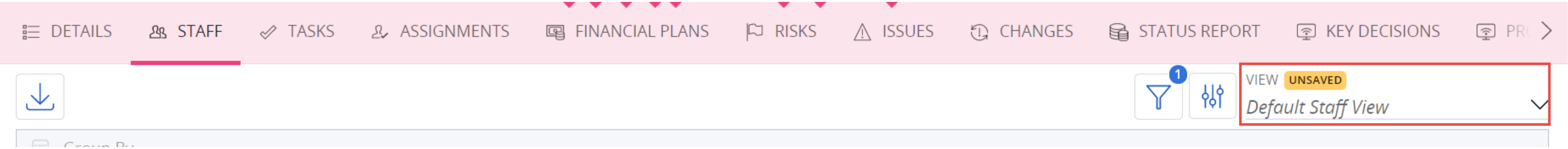
- You can assign roles to tasks just like resources
- Once you identify the named resource, perform a *Replace* to change the assignment from role to named resource

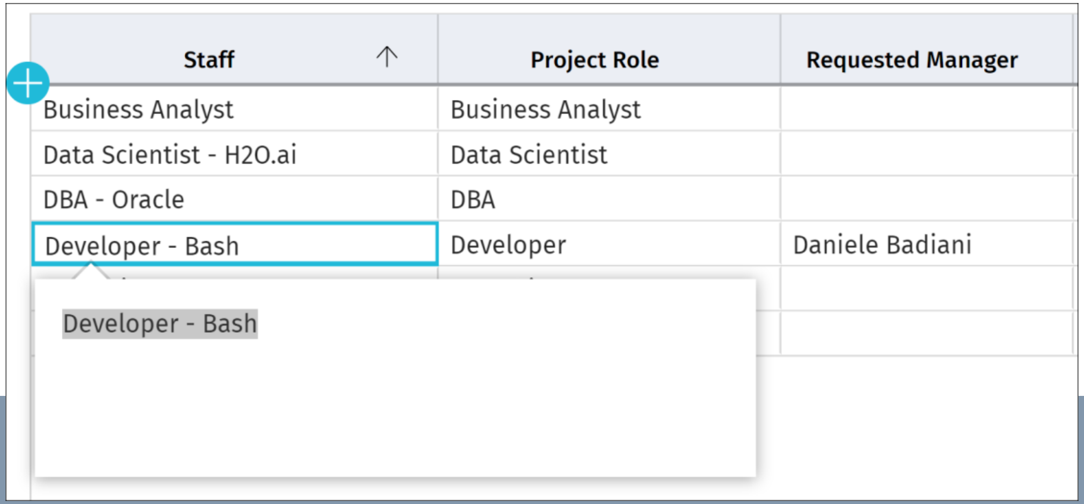
Staff Tab

- Use the *Staff* tab to add team members and update their default allocation.
- Use the column chooser at right to determine which fields to display, then add/update data inline as necessary.
- You must add *Default Allocation* into view if you wish to update the allocation % for the resource.
- Roles may also be added here.

Adding Roles

- Use the *Staff* tab to add Roles and update their default allocation. Ensure the *Default Staff View* is selected in the upper righthand corner
- Roles may also be added here using the + Icon
- Add detail about the Role by clicking into the Staff name
- Add the Requested Manager to the Staff Tab and enter the Manager name who should staff the Role

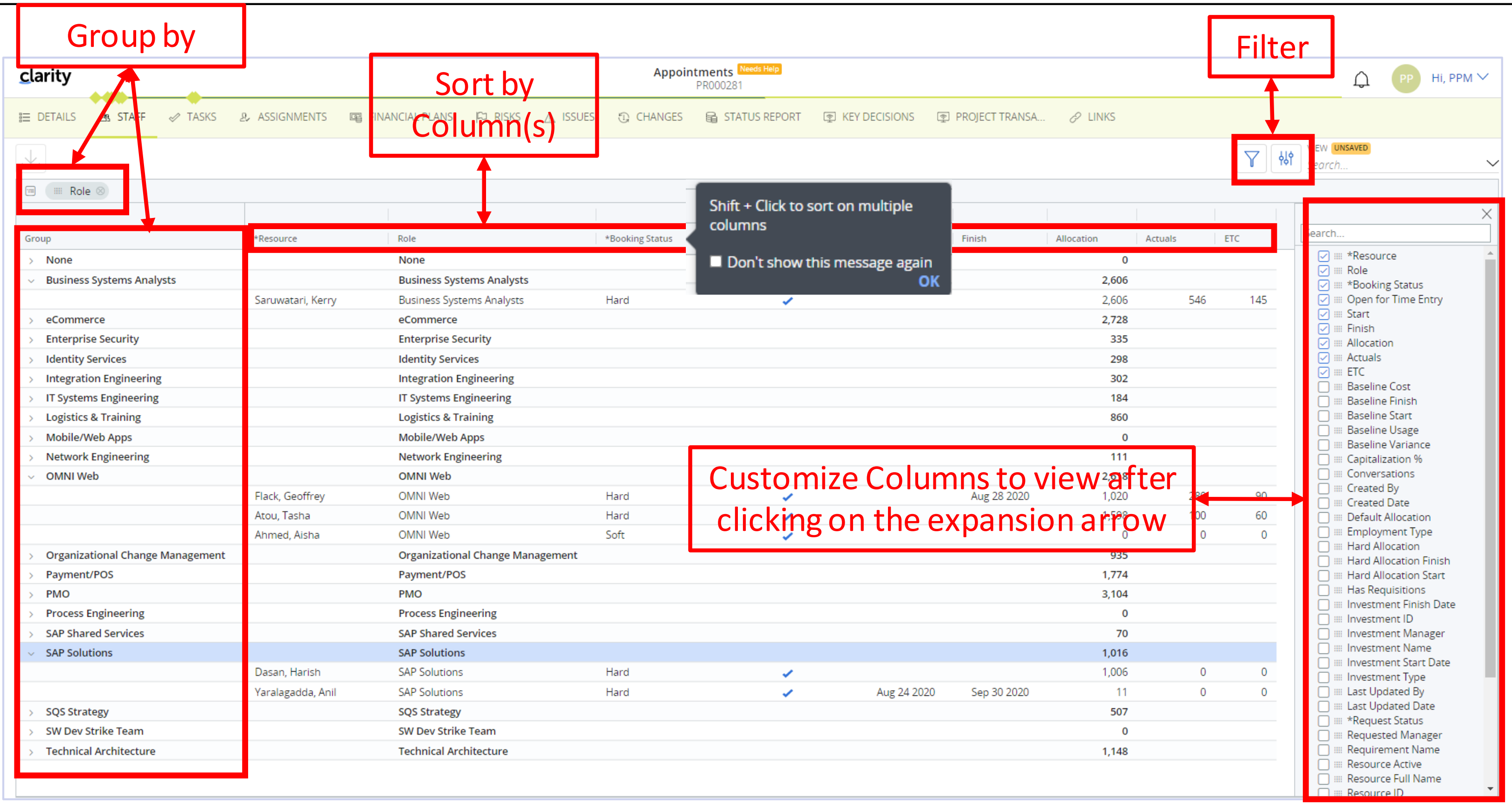




STAFFING TAB OVERVIEW

- The STAFF tab has a *Configure* expansion arrow on the right side of the screen to enable the Project Manager (PM) to add/remove columns to the Staff tab to provide details the PM wants to view
- Use the STAFF tab to View the project staff (project team) with named and unnamed resources (Roles, Teams)
- You can:
  - **Sort by Columns** (click once for ascending; twice for descending)
  - **Sort by Multiple columns** by holding down Shift+Click on the columns to sort
  - **Filter** results by various items by clicking on the Filter Icon, then click on Add Filter and select the item you want to filter by
  - **Group Resources** by dragging and dropping a column title in the Group By bar at the top of the page

    (NOTE: Ensure you sort prior to this step if you want the list sorted as once in Grouped view, you cannot sort)



Things to Remember…

- For most organizations:
  - PMs may add both roles and resources to their project team
  - PMs and RMs must communicate on a weekly basis in order to keep allocations updated – Clarity PPM is where decisions are documented
  - Clarity PPM defaults to 100% allocation when adding a resource to a project, so PMs should update this percentage as soon as feasible
  - Clarity PPM allows over-allocation of resources

Exercise

- Navigate to the Staff tab of a project
- Add at least one new role
- Add one named resource
- Adjust the default allocation %
- Update some of the properties for the new resource and role using in-line editing (for example, update the Start and Finish dates

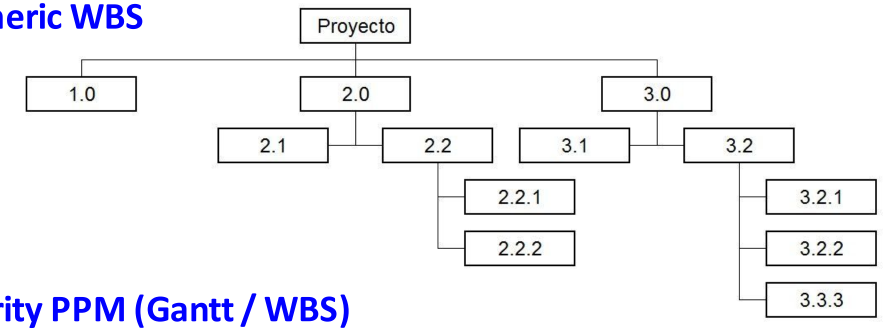
Time: 10 minutes

Part 5:
Work Breakdown Structure (WBS) & Tasks

Work Breakdown Structure (WBS)

- WBS is a task hierarchy that typically consists of phases and tasks
  - Phases are the major steps required to achieve a project goal
  - Tasks are established to complete the phase objectives
  - Tasks can be split into To-Dos
  - Milestones have no duration and no work effort (ETC)
  - Resource Assignments are done at the lowest level of the WBS – Tasks (not To-Dos)

Example Generic WBS



Example Clarity PPM (Gantt / WBS)

CA PPM

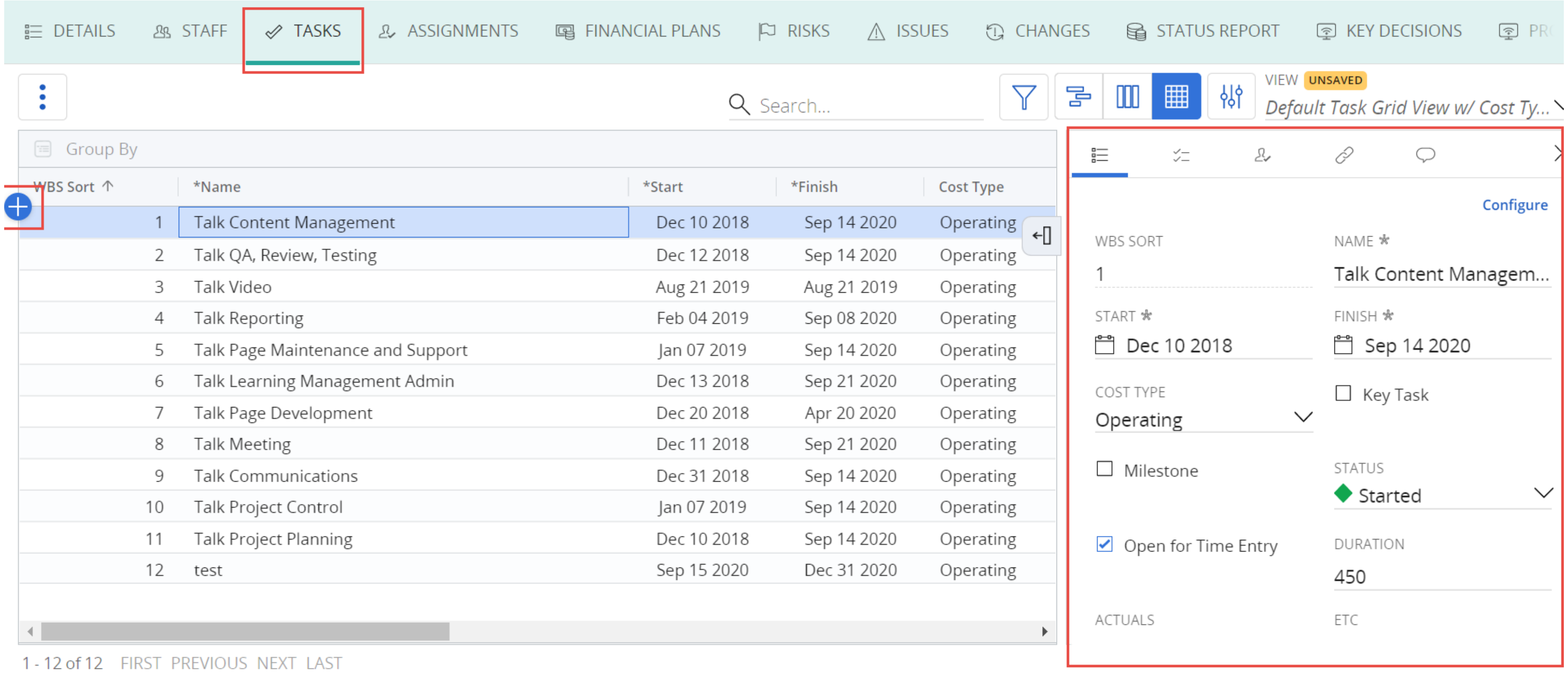
Project: iSeries Rehosting - *Gantt*

Filter: System Default

Task	Assigned Resources	Start	Finish	Duration	Status	O...	% Compl...	Actuals	ETC	EAC
Project Spending		7/15/19	11/6/20	338	Started		99%	0.00	0.00	0.00
iSeries Rehosting		7/1/19	11/6/20	347	Started	✔	90%	18,874.15	1,603.07	20,477.22
Research/Plan Stage		7/1/19	1/10/20	135	Completed		100%	5,385.00	0.00	5,385.00
Solution Requirements / Design		7/8/19	11/26/19	101	Completed		100%	377.00	0.00	377.00
PrjMgmt During Research/Plan		7/1/19	1/10/20	135	Completed		100%	4,175.75	0.00	4,175.75
Vendor Management		7/15/19	10/1/19	56	Completed		100%	4.00	0.00	4.00
Testing Design		7/25/19	12/11/19	98	Completed		100%	828.25	0.00	828.25
Planning sessions		9/16/19	9/20/19	5	Completed		100%	0.00	0.00	0.00
Research/Plan Stage Complete		12/19/19	12/19/19	1	Completed		100%	0.00	0.00	0.00
Implement Stage		8/20/19	10/28/20	305	Started	✔	86%	11,062.20	1,340.06	12,402.26
Project Management		12/3/19	11/6/20	239	Started	✔	90%	2,426.95	263.01	2,689.96
Project Control		12/3/19	10/12/20	220	Started	✔	92%	2,426.95	70.79	2,497.74
OCM Execution	Mang, Nathan;Wiese, Debbie	1/8/20	10/11/20	195	Started	✔	91%	16.00	8.07	24.07
DT Events		12/3/19	4/3/20	87	Completed		100%	0.00	0.00	0.00
Freezes		12/3/19	1/3/20	22	Completed		100%	0.00	0.00	0.00
Release Planning		12/6/19	4/3/20	84	Completed		100%	0.00	0.00	0.00
Status & Financial Report		1/10/20	9/23/20	181	Started	✔	88%	49.60	1.60	51.20
Status & Financial Report 14	Velasquez, Adriana;Wiese, Debbie	1/25/20	1/25/20	0	Completed		100%	2.00	0.00	2.00
Status & Financial Report 15	Velasquez, Adriana;Wiese, Debbie	1/10/20	1/13/20	2	Completed		100%	2.50	0.00	2.50
Status & Financial Report 16	Velasquez, Adriana;Wiese, Debbie	1/25/20	1/27/20	1	Completed		100%	0.25	0.00	0.25
Status & Financial Report 17	Velasquez, Adriana;Wiese, Debbie	2/10/20	2/10/20	1	Completed		100%	2.00	0.00	2.00
Status & Financial Report 18 (2/24)	Velasquez, Adriana;Wiese, Debbie	2/21/20	2/24/20	2	Completed		100%	2.00	0.00	2.00

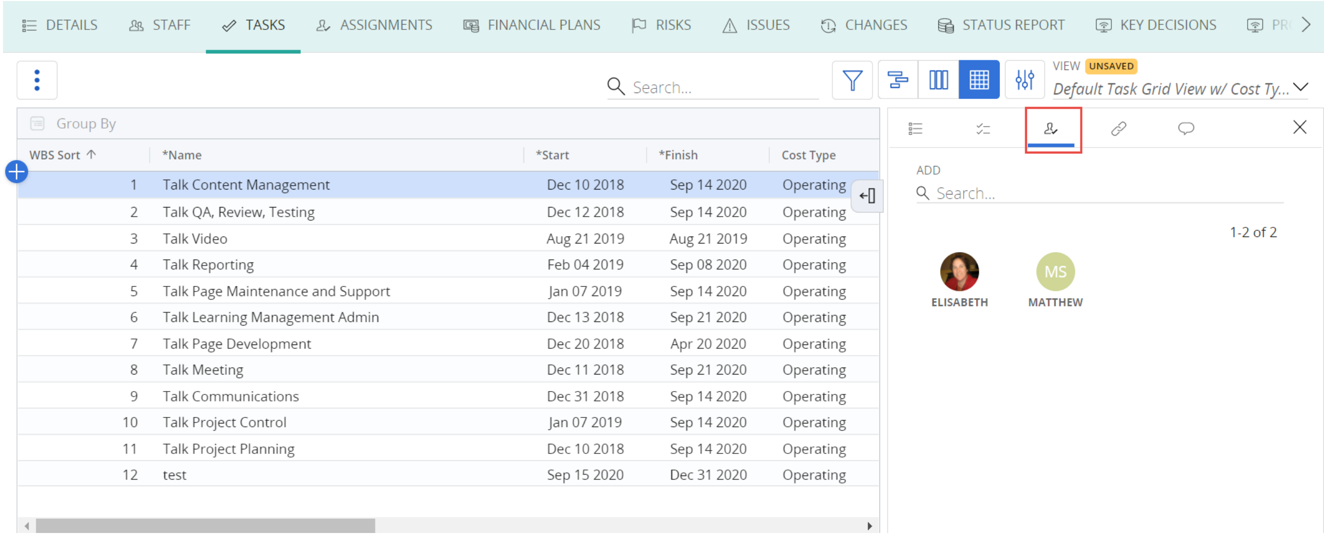
Tasks Tab (1)

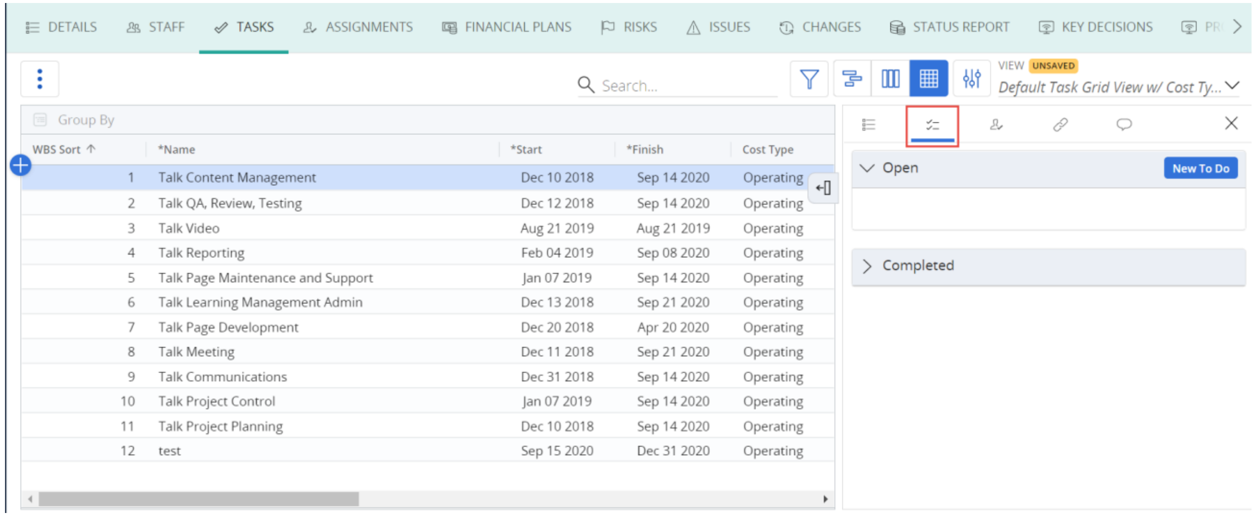
- The default, displays tasks created from the Project Template. PMs may add additional tasks.
- To-Dos may be created on each task
- Only two levels of the WBS are viewable in the new UX. If WBS exceeds two levels in Classic, an error will display in the new UX.
- Click a task and then the Details tab DETAILS on the right to view its properties.

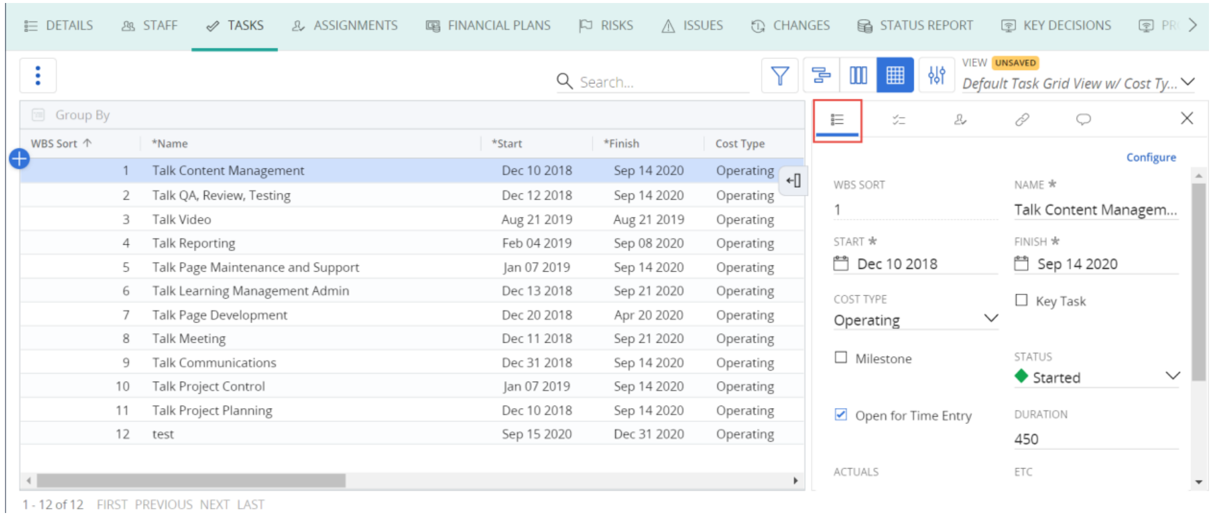


Tasks Tab (2)

- Subsequent tabs allow for:
  - Task "To Do's"
  - Task Assignments
  - Task properties updates

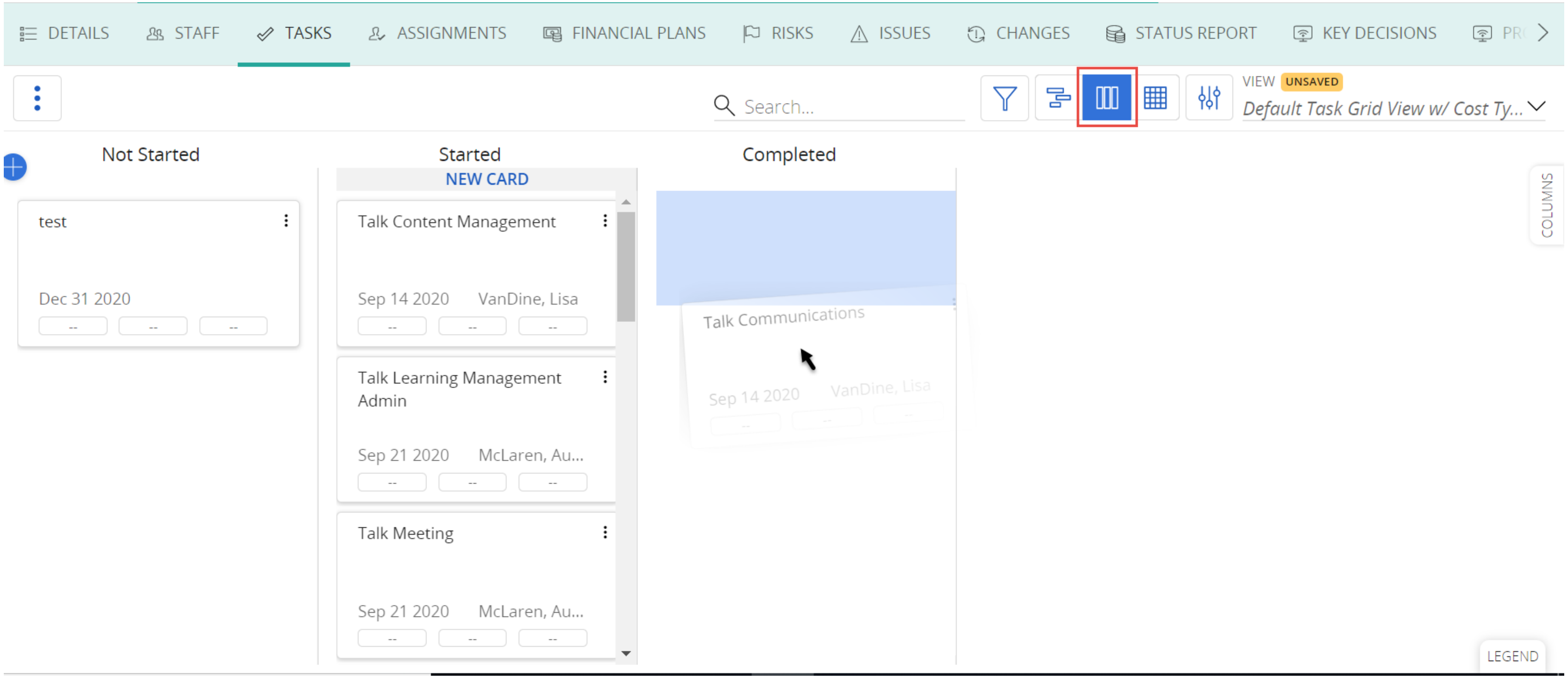






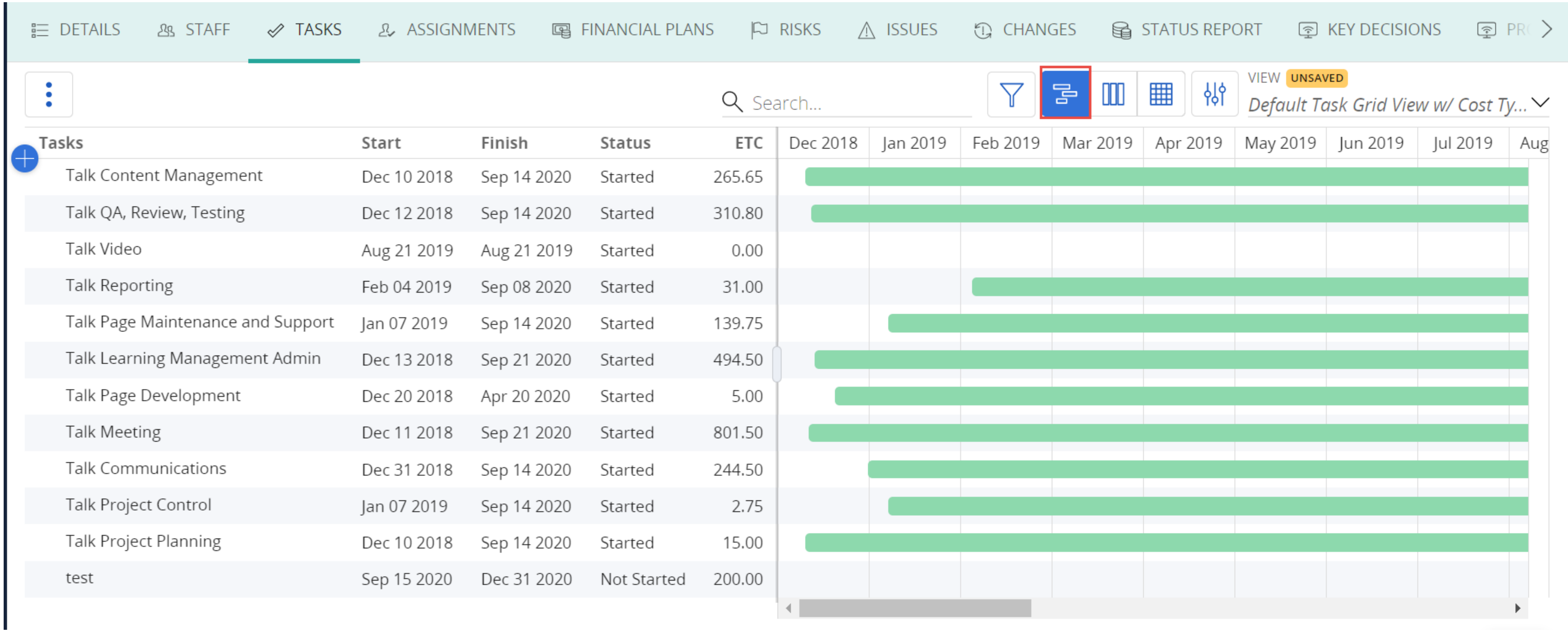
Kanban Task Board

- A Kanban style task board may also be utilized in place of the traditional Gantt Chart.
- Edit column names and add/remove columns as necessary, then drag and drop tasks among columns



Task Timeline View

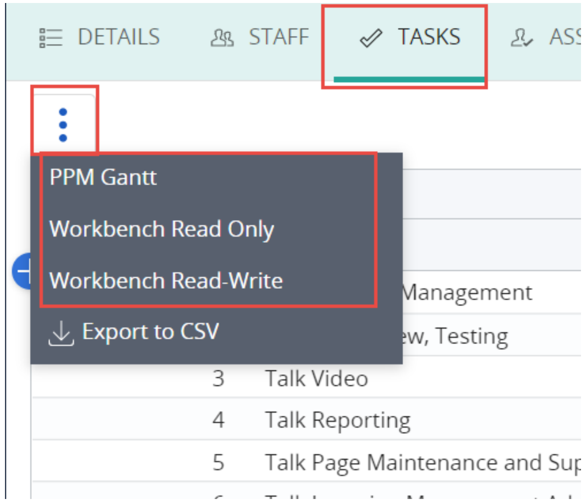
- Tasks can be viewed in a simple Grid and Timeline view
- Use the + icon to add Tasks



Tasks	Start	Finish	Status	ETC
Talk Content Management	Dec 10 2018	Sep 14 2020	Started	265.65
Talk QA, Review, Testing	Dec 12 2018	Sep 14 2020	Started	310.80
Talk Video	Aug 21 2019	Aug 21 2019	Started	0.00
Talk Reporting	Feb 04 2019	Sep 08 2020	Started	31.00
Talk Page Maintenance and Support	Jan 07 2019	Sep 14 2020	Started	139.75
Talk Learning Management Admin	Dec 13 2018	Sep 21 2020	Started	494.50
Talk Page Development	Dec 20 2018	Apr 20 2020	Started	5.00
Talk Meeting	Dec 11 2018	Sep 21 2020	Started	801.50
Talk Communications	Dec 31 2018	Sep 14 2020	Started	244.50
Talk Project Control	Jan 07 2019	Sep 14 2020	Started	2.75
Talk Project Planning	Dec 10 2018	Sep 14 2020	Started	15.00
test	Sep 15 2020	Dec 31 2020	Not Started	200.00

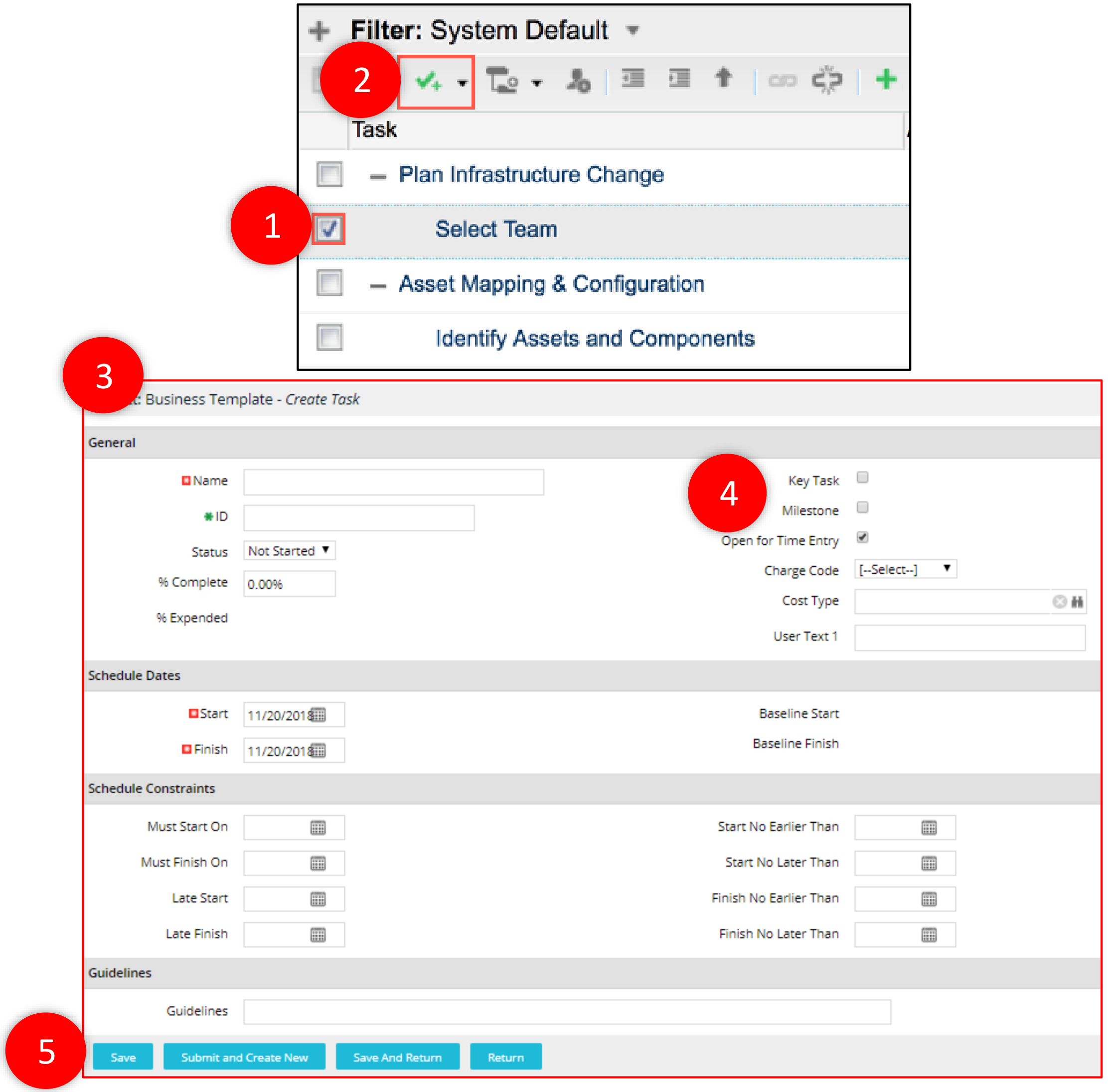
The Gantt Scheduler

- In the Tasks tab, press the 3 blue dots to select PPM Gantt or Microsoft Project (refer to the Clarity PPM MS Project QRG to manage projects in MSP)
- Gantt chart opens in a new window
- Displayed fields are very similar to the Task List with the addition of the Gantt chart time framed section
- You can drag column headers to change column width
- Frequently Used *Gantt* menu icons
  - Save or discard changes
  - Create a new task
  - Indent, Outdent, and Move
  - Link or unlink tasks (create a dependency)
  - Expand or collapse task hierarchy
  - Delete Task



Create a New Task – Gantt View

1. Check the box at the desired insertion point (this will place the new task below the selected location)
2. Click the Create Task Icon or press the Insert key
3. Populate the fields as desired (a red asterisk indicates a required field)
4. Check the Key Task, Milestone, and/or Fixed Duration boxes as appropriate
5. Click Submit and Create New or Save and Return



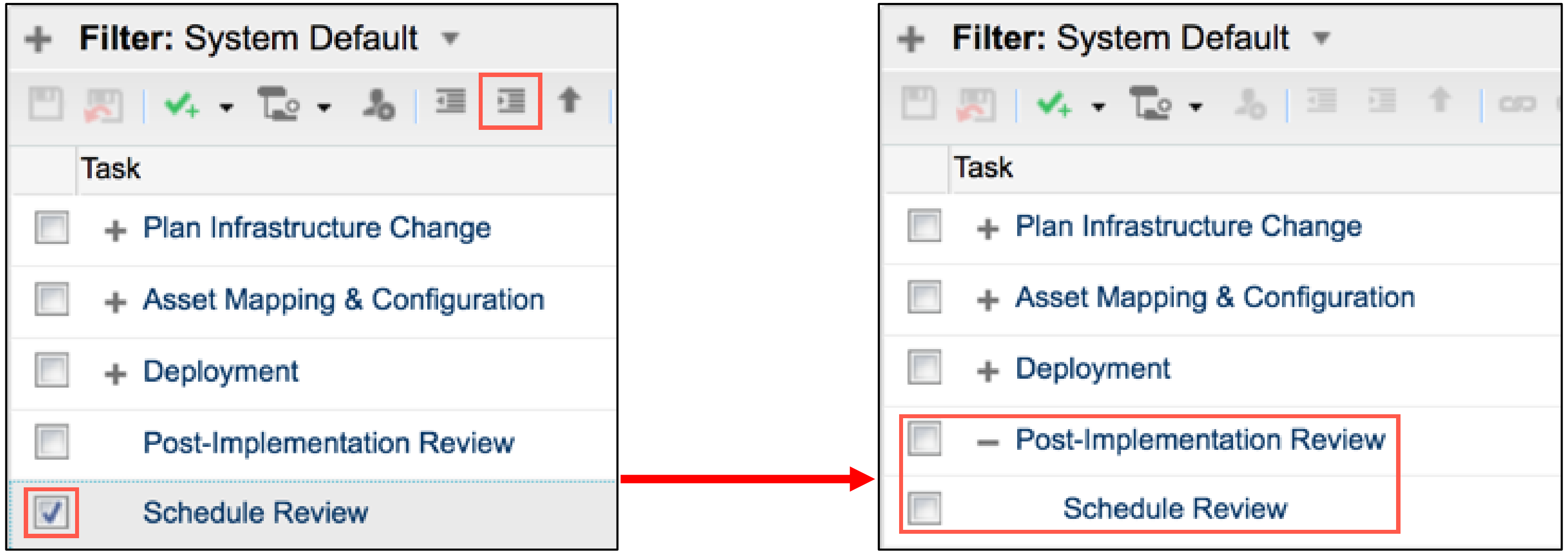
Create a New Task – Gantt View (2)

To establish a WBS hierarchy of indented tasks:

6. Select the Task(s)

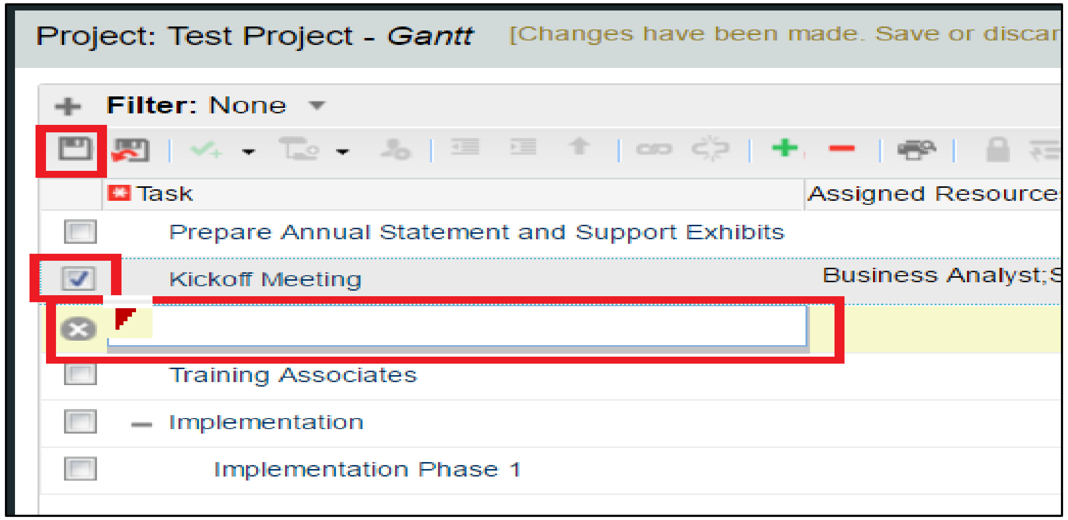
7. Click the Indent icon (Clarity PPM places a + button next to the insertion you picked in step one)

8. Click the + button to expand and see the task(s) you created



Create a New Task – Gantt View (3)

1. Select the desired insertion point and press the Insert key (on your keyboard) as many times as desired
2. Click and type directly into the Name field for each entry (changes will be denoted with a red triangle in the upper left corner of the new task)
3. Click the Save icon in the toolbar



Exercise

- Open the PPM Gantt for a project
- Create a new task using the Menu Structure
- Indent the New Task
- Create a New Task from the body of the Gantt Chart
- Save

Time: 10 minutes

Part 6: Resource Assignments to Task(s)

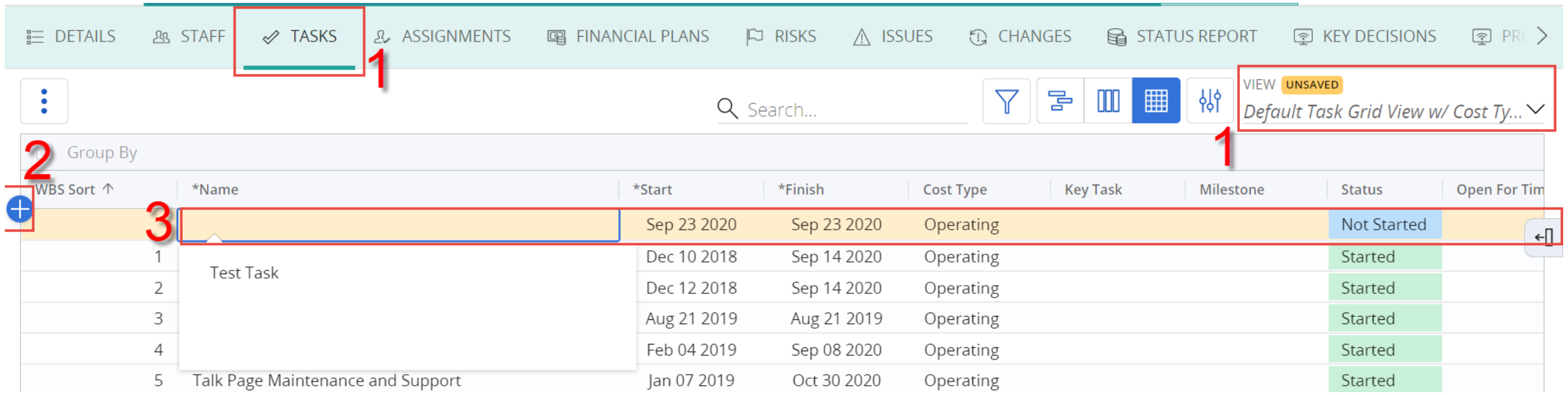
What is Estimate to Complete (ETC)?

- ETC is the number of hours it is estimated it will take the resource to complete their work on the task
- ETC decrements as actual time is tracked against the assignment
- Clarity PPM uses ETC’s to more accurately determine task duration when using Autoschedule
- There are two ETCs in Clarity PPM:
  - The resource(s) ETC on the Team Tab that shows the resources total ETC for the project
  - The Task ETC which aggregates all resource(s) ETCs into one number.
- It may be faster to assign resources to tasks and enter ETC’s in MS Project than in Clarity PPM
  - Pick the method that is best for you and use it extensively

Note: Never open the same Clarity PPM project schedule in MSP and then into OWB

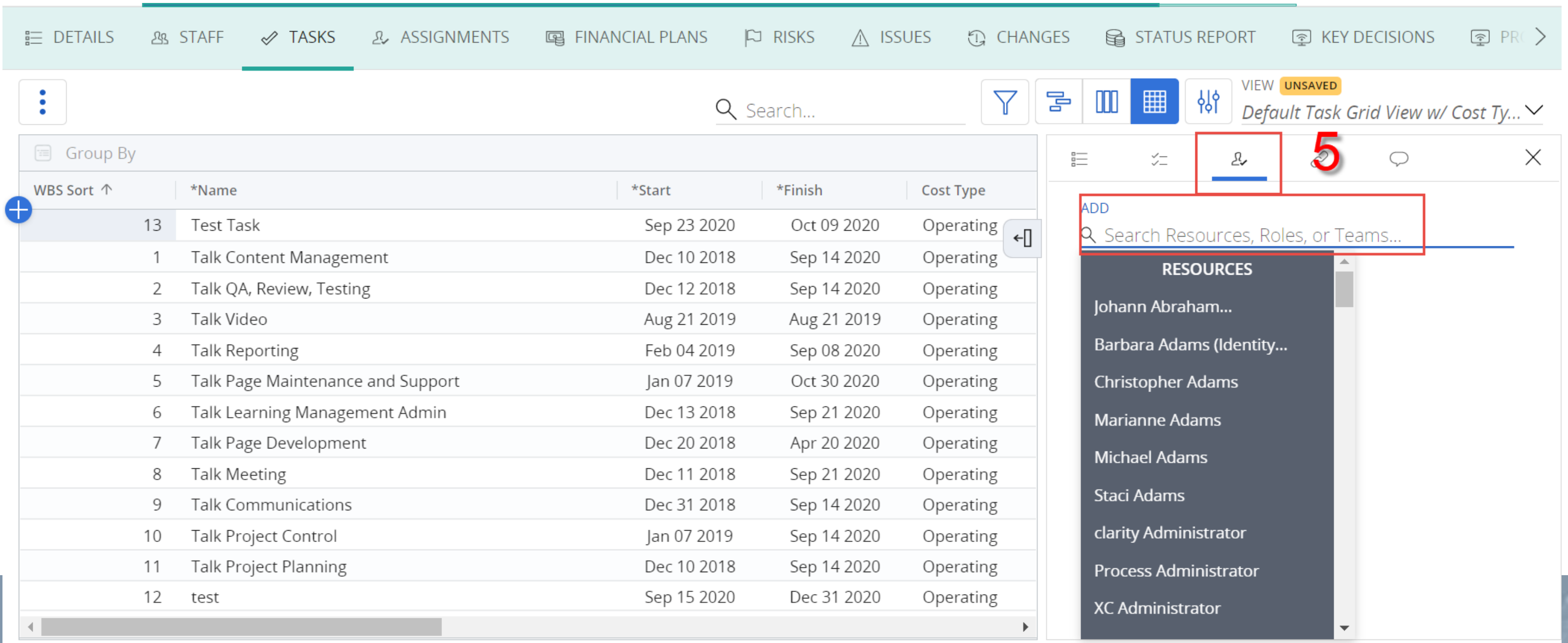
Assigning Resources to Tasks

1. On the Tasks tab, make sure the View is set to *Default Task Grid View w/ Cost Type*
2. You can use the add icon to create a new task
3. Type in the task name and edit other fields in-line



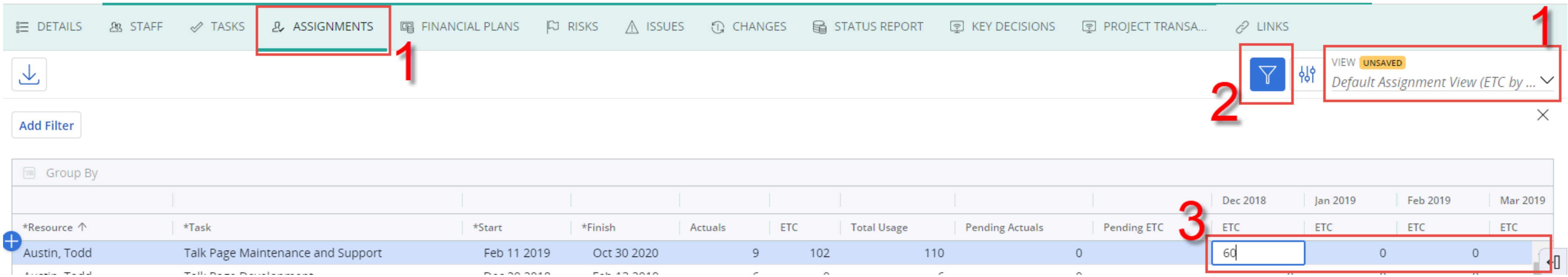
4. Once task is created, make sure the row is selected and press the Details pop out tab  on the right side

5. On the Assignments tab, you can add multiple people to one task



Adding ETCs

1. On the Assignments tab in the View dropdown in the upper right hand corner, make sure the *Default Assignment View (ETC by Period)* is selected
2. Select the person and the task you would like to add ETCs to using the Filter icon
3. You can add ETCs in-line by period for each resources' tasks



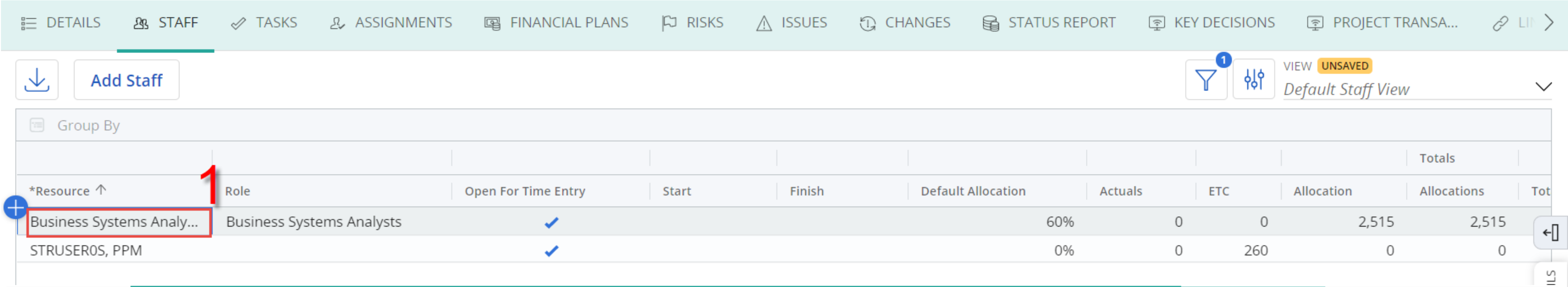
Replacing a Role / Resource

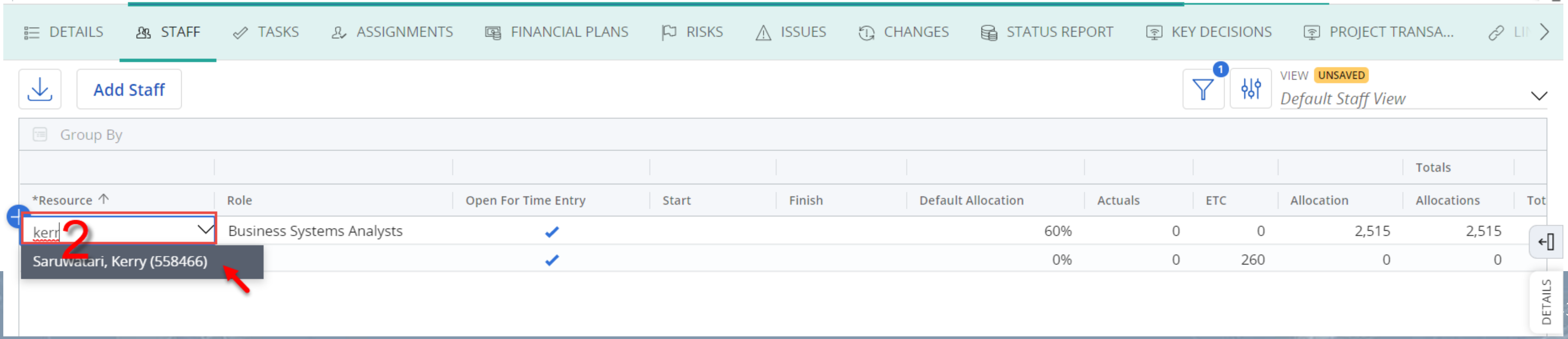
- If a named resource has been identified to replace a role, or if a resource is no longer available to work on a project, you can replace the named resource
- Task actuals remain with the original resource and you cannot remove a resource with charged actuals from the project team
- Only remaining Allocations and ETCs transfer to the new resource
- You may replace a role with a resource, a resource with another resource, or a resource with a role
- It is necessary to contact an individual's RM before adding him or her to your team as a replacement resource

Replacing a Role / Resource

1. To Replace a Role from the Project Staff tab, click into the Resource field for the role that you want to replace

2. Start to type the name of the resource that you are replacing the role with. When the name populates, you can select the resource name





Exercise

- Navigate to the Tasks tab of a project
- View the Task Properties page by selecting it and pressing the Details tab on the right hand side
- Assign a resource and a role
- Edit the ETCs
- Replace the resource or role with another resource or role

Time: 10 minutes

Part 7: Controlling a Project

Tracking Progress

- As Clarity PPM Timesheets are posted project plan actuals and ETC's are updated automatically
- As time goes on, PM's may need to adjust allocations and ETC's due to project dynamics
- Always open your Plan after time posting to view actuals and pending ETC's
- PMs should keep the project plan tasks ETC's current
- PMs should keep Task status current
- To mark a task complete all ETCs must be 0
- Review the plan for:
  - Tasks which were scheduled to start but did not
  - Tasks, which were scheduled to be completed but did not
  - Unplanned tasks and assignments (scope changes)

Pending Actuals and Pending ETC’s

- Actuals are in Pending status until they are posted to the plan. These “pending actuals” can be viewed in the plan by the Project Manager.
- Pending or Proposed ETC’s are revisions coming in from a team members timesheet
- These ETC’s must be accepted or rejected as they are valid estimates to Clarity PPM
- Prior to posting PM’s can review:
  - Work effort entered on timesheets is captured as “pending” and can be reviewed by the project manager
  - Time incorrectly applied can be corrected by Team members via timesheet adjustments

Updating Task Status

- When the project is ready to close, PM's should update task information
  - Update Task Status
    - The task status will automatically switch to Started once time has been tracked
    - To mark a task Complete, all remaining ETC's must be 0
    - The status must also be manually changed to Complete
  - Turn time entry option on/off
    - Open for Time Entry needs to be turned off - Resources can still track time to a task that has no ETC and has a status of Complete. The option to remove ability to track time to a task is located on the task properties.
    - Open for Time Entry turned on – Tasks, INCLUDING the Phase and Activity levels above must be checked ON

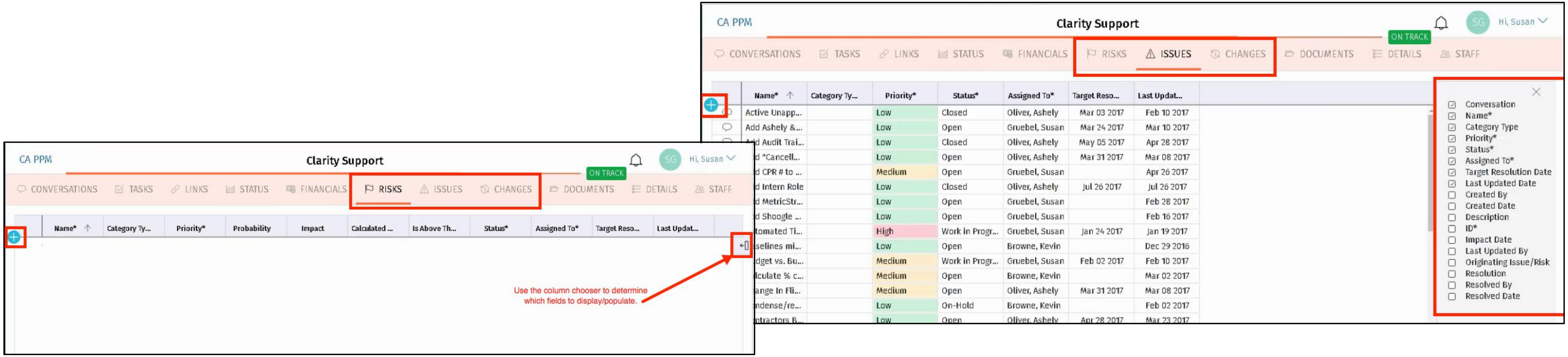
Part 8:
Risks, Issues, Change Requests, and Key Decisions

Risks and Issues

- Risks and Issues can be identified at any time during a project's lifecycle
- A Risk can escalate to an Issue, and an Issue can downgrade to a Risk
- Both Risks and Issues can create Change Requests
- Change Requests are logged when there is a material change to the project scope, schedule or budget

Risks, Issues, and Changes Tabs

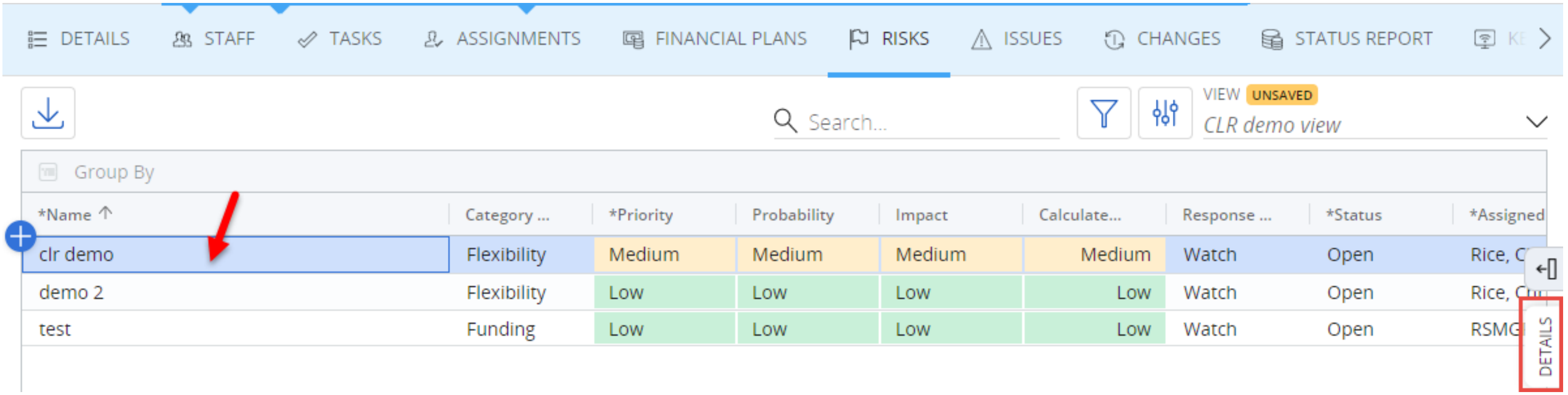
- Use these 3 tabs to create Risks, Issues, or Changes for Projects.
- R/I/C may only be created inline, by clicking the "+" button.
- Use the column chooser at the right to determine which R/I/C fields are in view and may be edited.



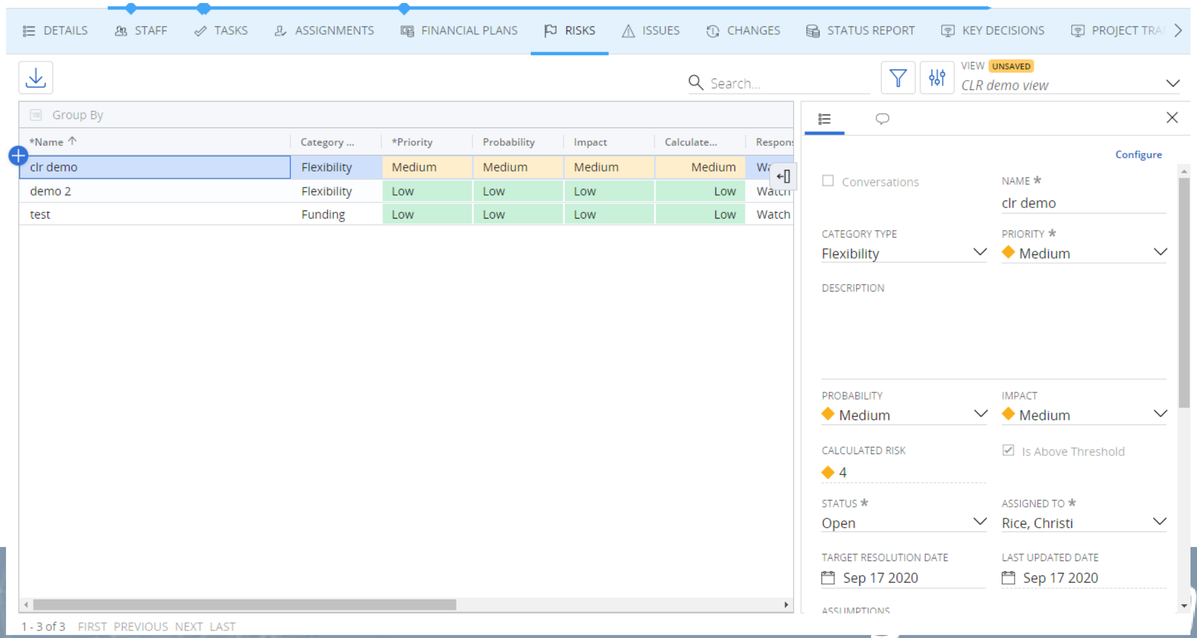
- If editing Risk Target Resolution, also include the Impact Date. Resolution date cannot be after the Impact Date

Risks, Issues, and Changes Tabs

- To view the edit screen, click on the R/I/C row and select the Details tab on the right edge of the screen



- You will be able to see and edit the details of the R/I/C



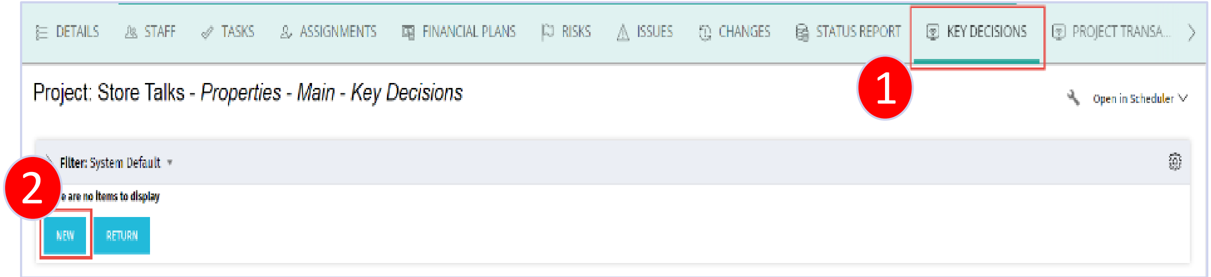
Exercise

- Navigate to the Risks/Issues/Change Requests tabs of a project
- Create a New Risk
- Create a New Issue
- Create a New Change Request

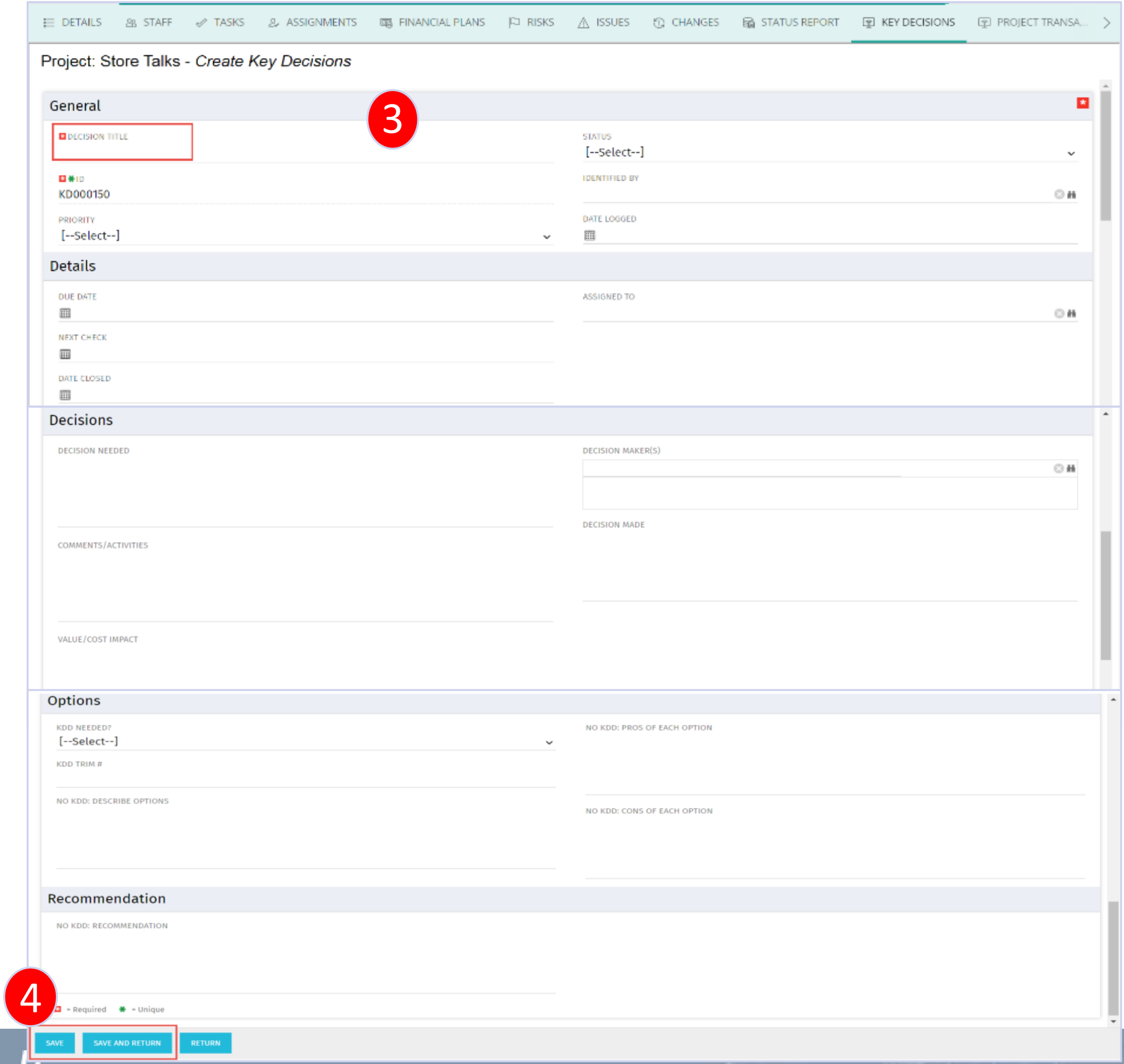
Time: 10 minutes

Key Decisions

1. Use the Key Decision tab to create and edit key decisions for Projects
2. Press the New button to create a new Key Decision



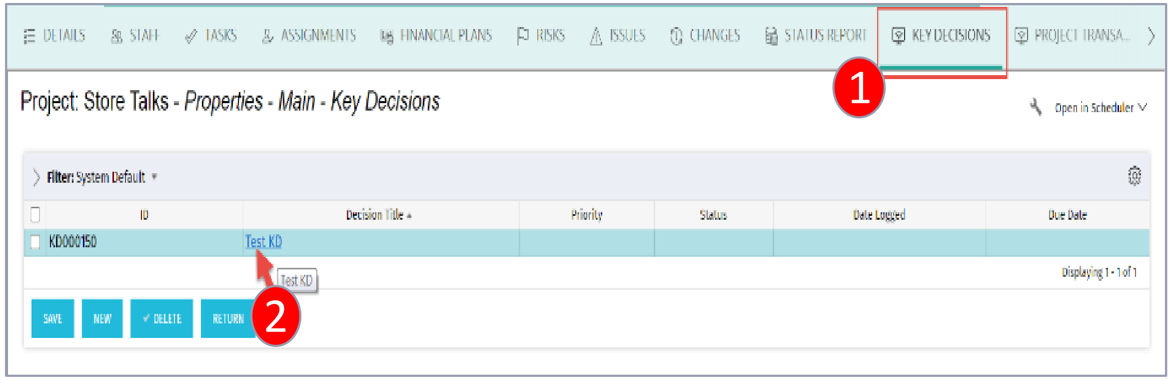
3. Enter in the required fields and any supporting fields as needed
4. After fields have been entered, press **Save** or **Save and Return** to return to the list of Key Decisions page

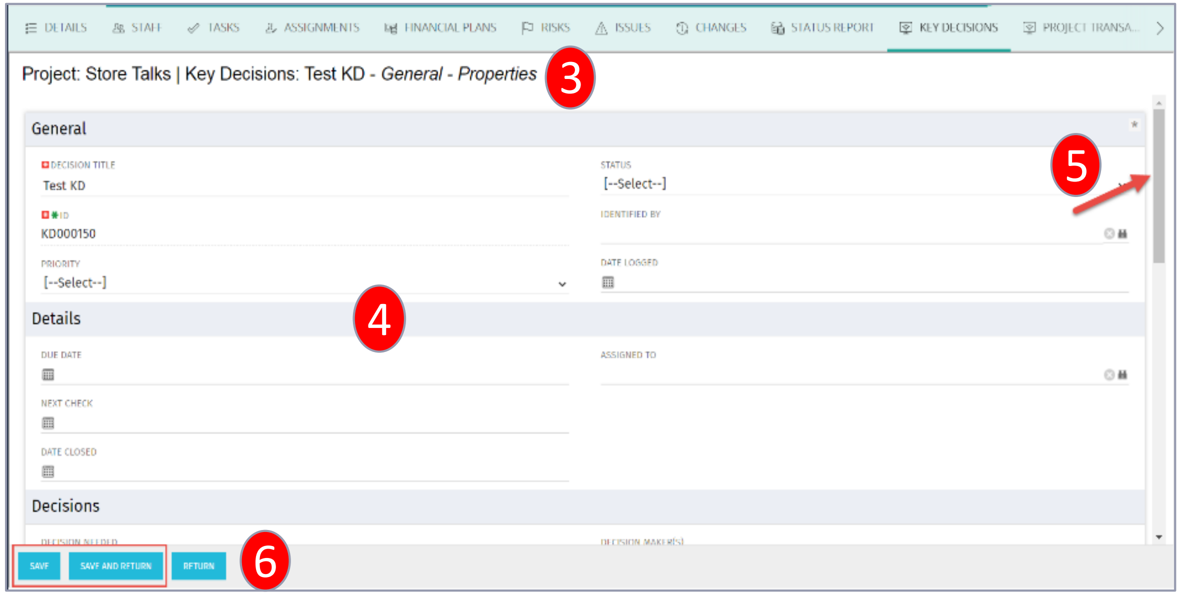


Key Decisions

Edit Existing Key Decision

1. Use the Key Decision tab to create and edit key decisions for Projects
2. To edit an existing key decision, press the Decision Title
3. This will open up the details of that key decision
4. Enter in any details as needed.
5. You can reach the rest of the fields using the scroll bar on the right hand side.
6. Press Save or Save and Return to return to the list of key decisions page





Part 9: Financial Management

(for more detailed cost plan instructions, please refer to the Cost Plan QRG)

What is Financial Management

- Project Financial Management is a process that combines all the money-related parts of governing a project and is involved at every point of a project that includes cost planning and cost spending.
- It is a method by which costs (or expenses) are planned and incurred on the project.
- It operates on the premise of having a good project plan, good cost control measures and effective reporting for appropriate decisions to be made.
- Project Financial Management is not accounting; as accounting is concerned with the monetary bottom line while project financial management looks at how successful the project met its cost, time and schedule parameters.

What is Detailed Clarity PPM Financial Planning?

Detailed financial planning allows for the estimation of costs and/or funding of investments (projects) using cost plans. These plans can then be submitted and approved for funding using budget plans.

- Detailed Financial Plans also help to:
  - Model, in detail, where costs for an investment occur
  - Compare estimates to actuals in time-sliced views, such as monthly or quarterly
  - Breakdown costs by different grouping attributes or criteria for reporting purposes
  - Create the budget most suitable for the investment or business needs

Financial Plans

TERMS OF USE

Term	Definition
Cost Plan	The proposed cost for project-level efforts (Working Plan). • Aggregated Reporting of Financial Cost Attributes • Time Scaled Estimates • Available to Project Manager
Budget Plan	A Cost Plan which has been submitted for approval to become a financial baseline (Approved Plan). • Financial Baseline
Plan of Record (POR)	The cost plan that will feed into reports

What is a Cost Plan?

- Cost plans are the first step in utilizing Clarity PPM financial plans, and they can span multiple fiscal time periods
- PLANNED and ACTUAL cost and effort can be tracked along with the variances over the lifetime of an investment
- In addition, data can be sorted by different grouping attributes or criteria
- Cost Plans can be created manually or populated based on resource assignments or allocations
- Multiple cost plans can be created, but only one can be designated as the cost plan of record
- This is the detail behind the "Planned" amounts within the investment

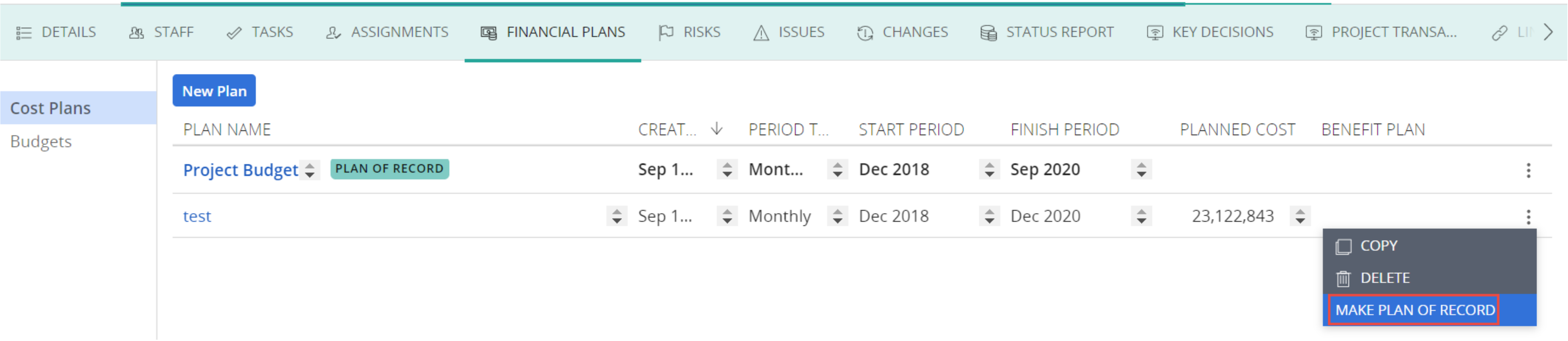
When to create Cost Plans?

- In general, the first cost plan should be created AFTER these items have been completed:
    - Investment is fully staffed and allocations are set
    - Investment is financially-enabled

		DEC 2018				JAN 2019				TOTALS			
		PLANNED	ACTUAL	REMAINING	% SPENT	PLANNED	ACTUAL	REMAINING	% SPENT	PLANNED	ACTUAL	REMAINING	% SPENT
Cost T... ↑	Transact...	146,450	3,432	143,018	2%	839,169	4,123	835,046		23,122,...	52,700	23,070,...	0%
Capital	Employee	50,854	0	50,854	0%	45,376	0	45,376		15,175,987	0	15,175,987	0%
Capital	Contractor	7,520	0	7,520	0%	750,275	0	750,275		7,558,742	0	7,558,742	0%
Operating	Employee	3,327	3,432	(105)	103%	3,518	4,123	(605)		193,744	52,623	141,120	27%
Operating	Contractor	84,749	0	84,749	0%	40,000	0	40,000		194,370	77	194,294	0%

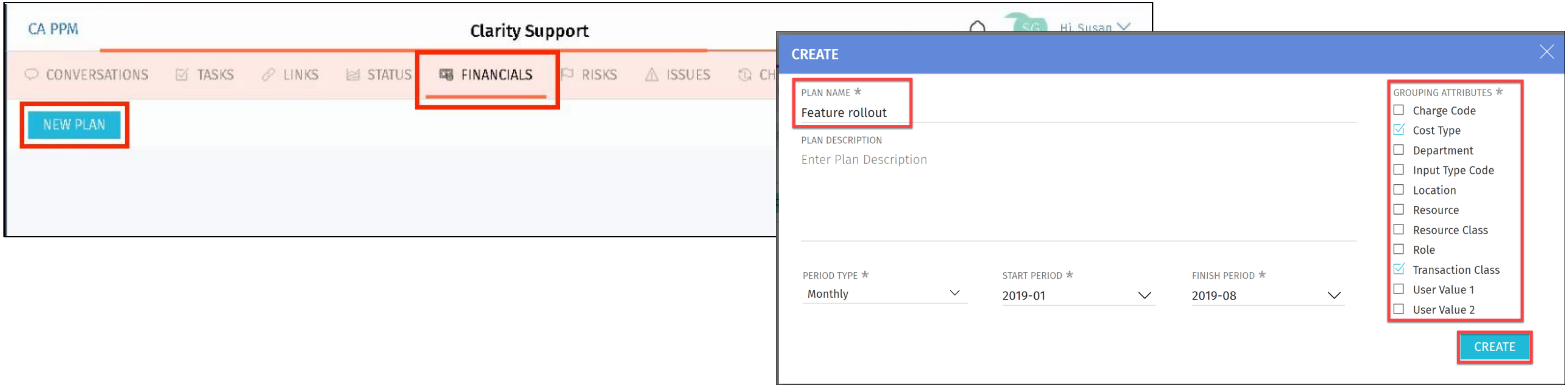
Plan of Record (POR) PLAN OF RECORD

- The POR is the cost plan that you intend to use for reporting
- The first cost plan created for an investment becomes the POR by default. POR status can be reassigned to any additional plans as they are created.
- The Cost Plan of Record is the plan that will populate the financial summary fields in any portfolio the investment is associated to



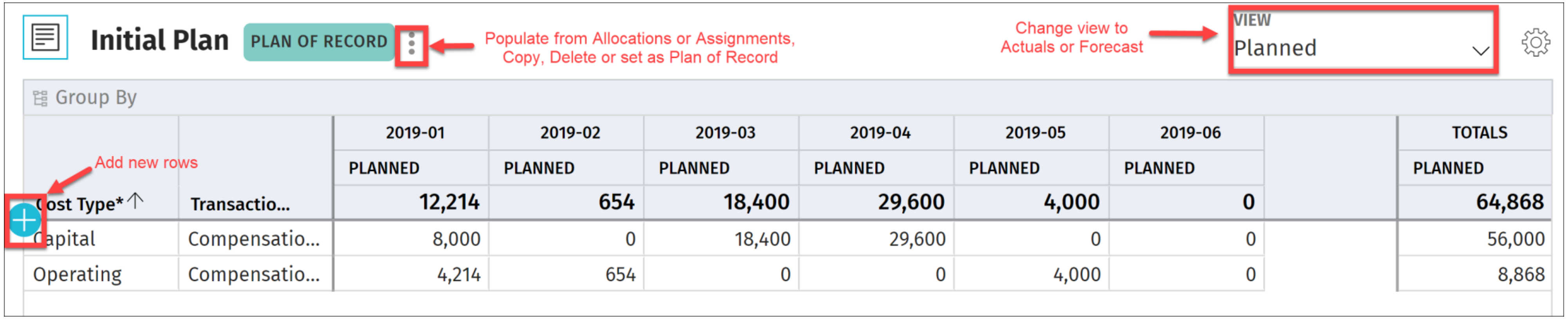
Financials Tab

- Use this tab to create and update Cost Plans for the Project
- Click New Plan
- Complete the form including Plan Name and Grouping Attributes and click Create
  - Always select Cost Type and Transaction Class



Financials Tab

- Populate from Allocations or Assignments
- Change View to Actuals or Forecast
  - “Forecast” view shows past actuals and future planned cost
- Use the + icon to add new rows
- You can manually enter in forecast costs in-line after you add your non-labor rows month by month



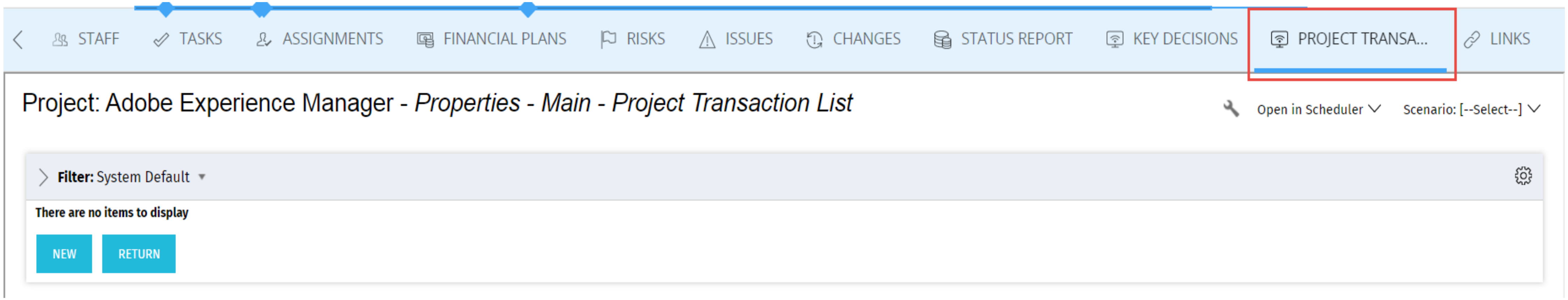
Cost Type*	Transactio...	2019-01 PLANNED	2019-02 PLANNED	2019-03 PLANNED	2019-04 PLANNED	2019-05 PLANNED	2019-06 PLANNED	TOTALS PLANNED
		12,214	654	18,400	29,600	4,000	0	64,868
Capital	Compensatio...	8,000	0	18,400	29,600	0	0	56,000
Operating	Compensatio...	4,214	654	0	0	4,000	0	8,868

Actuals On A Cost Plan

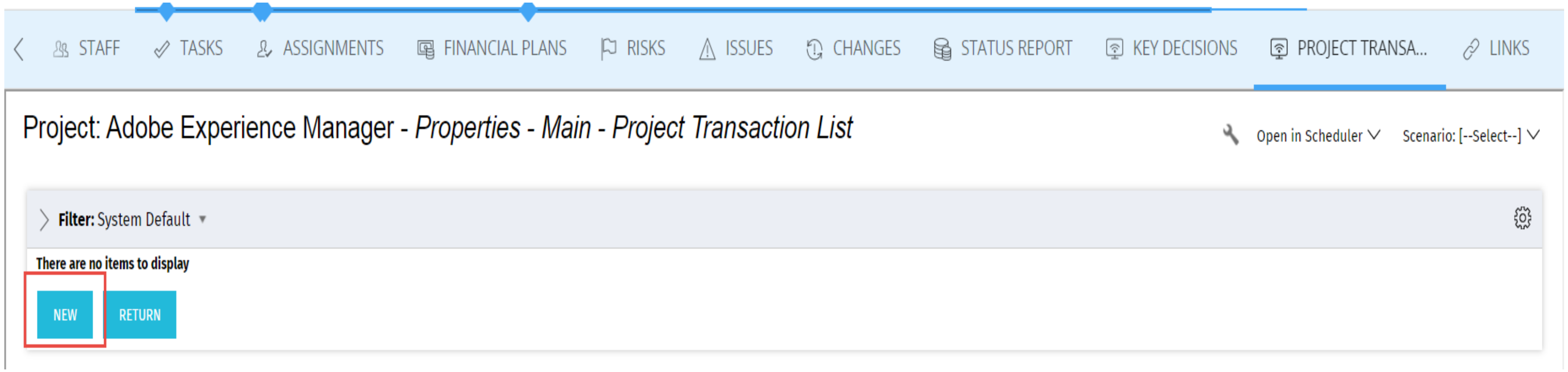
- Actual spend gets into Clarity in two ways:
  1. For those tracking time (Employee, Contractor), the actuals are automatically calculated/populated.
  2. Everything else, the "non-labor" costs, must be manually entered.
- Actuals are calculated for/applied to the Cost Plan of record by a batch job that runs twice daily: noon and midnight.
- Actuals are to be applied at least monthly.

Entering Non-Labor Actuals

1. After navigating to the Project Transaction Entry tab



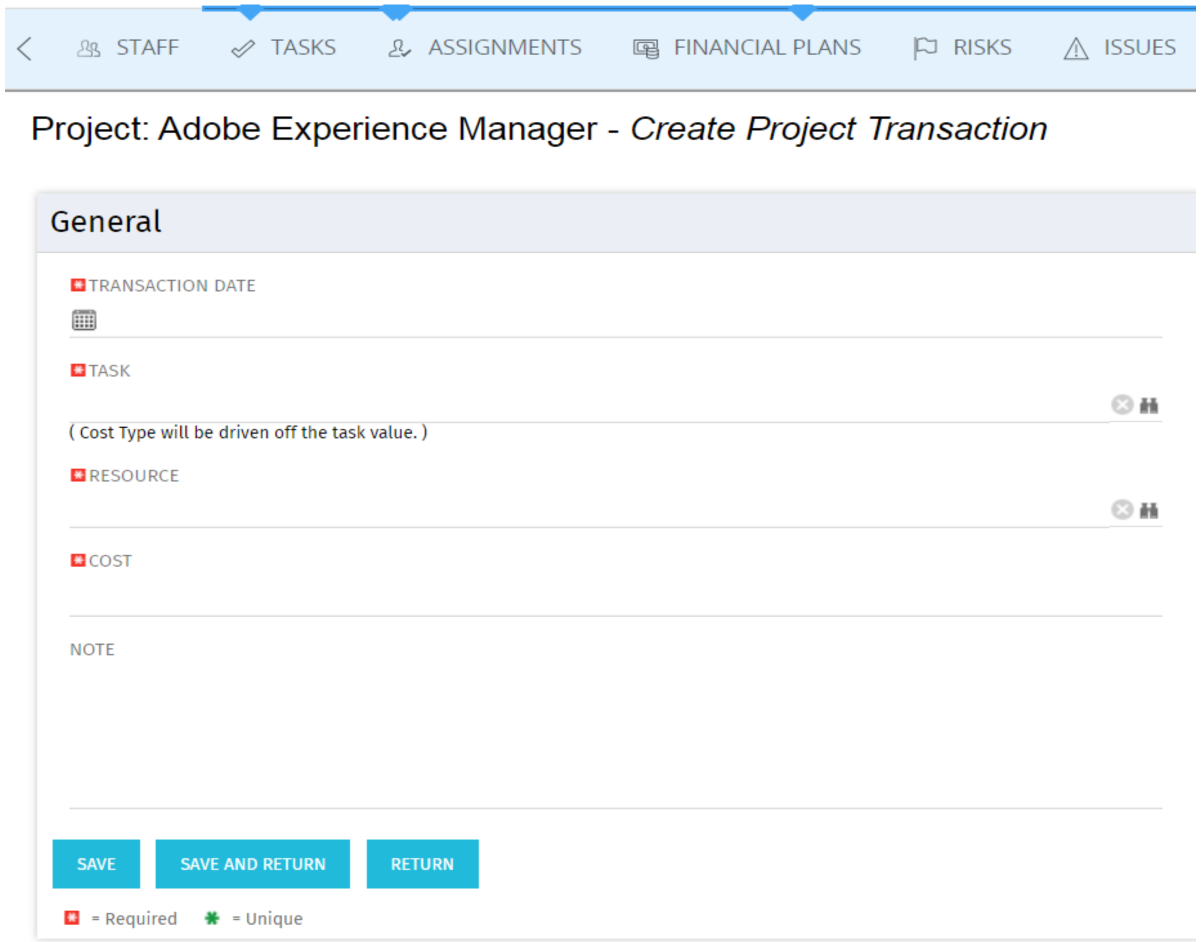
2. Click New



Entering Non-Labor Actuals (2)

3. Enter the required data for each transaction:
    a. Transaction Date – the date the item was paid
    b. Task – select the appropriate spend task
    c. Resource – options are filtered based upon the selected Task; it cannot be filled prior to the Task being selected
    d. Cost – amount to be applied
    e. Note – use this field to add details of the transaction, such as the invoice number or vendor name; very helpful when researching

4. If you have additional entries to make, click Save or, if you're done, click Save And Return



Exercise

Create a cost plan using one of the following ways:

1. Manually entered values
2. Populated from Allocations to the project (must have staff added to the Team tab)
3. Populated from Assignments to tasks (must have resources or roles assigned to tasks)

Time: 15 minutes

What is a Budget Plan?

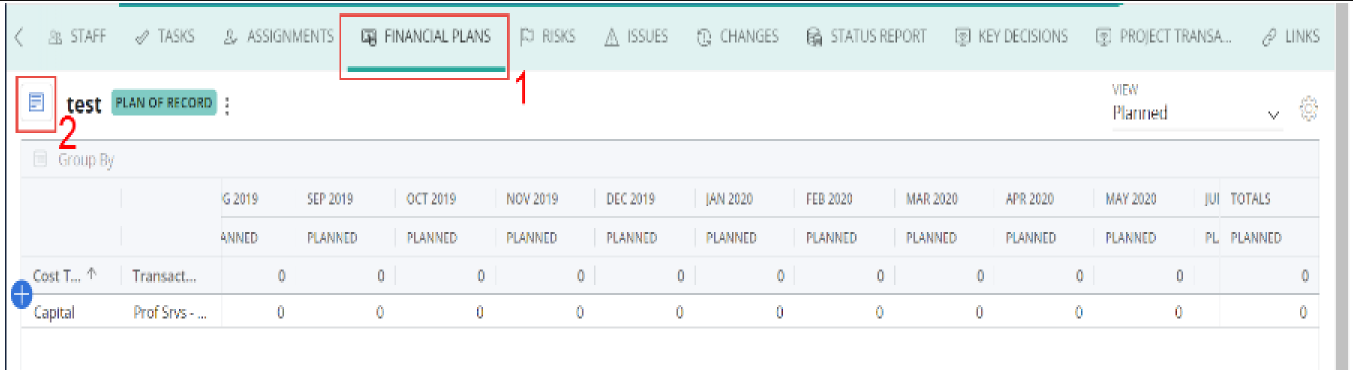
- Cost Plans are submitted for approval and once approved becomes the budget plan - The “baseline” for financials
- Budget Plans are mirror copies of the submitted cost plan view
- Approved budget plans are READ-ONLY ‘snapshots’ of the submitted cost plan
- Multiple budget plans can exist
- This functionality should be used to get investment estimates approved as a budget
  - Because a budget plan is not-editable, it provides a baseline snapshot of the original project effort and cost estimates for historical reference

Submitting a Cost Plan to become a Budget Plan

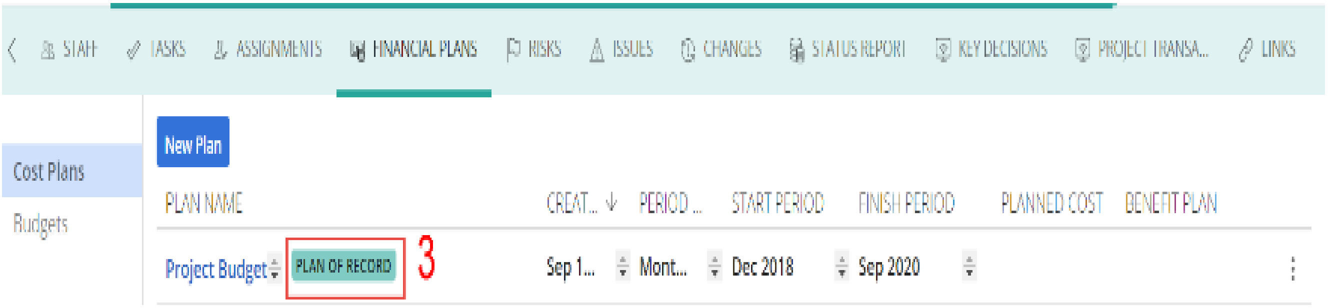
- Cost Plans should be submitted for approval as a Budget Plan based on what's in the Financial Justification Worksheet (FJW).
    - Changes to Cost Plan estimates are expected throughout the lifecycle of any project. BUT, initial estimates should be completed to the point where a viable budget estimate is created before your first submittal.
- Subsequent submittals – As change requests to the estimates take place throughout the duration of the project, new Cost Plan budgets may need to be created. The NEW Cost Plan budget, once complete and made the Plan of Record (POR), it should be submitted for approval. Once approved, it would then become the new budget plan.
- A Cost Plan budget must be designated as the POR before you can submit it for approval
- Only one cost plan can be submitted for budget plan approval at a time.
- After budget is approved then you can change your POR to your working cost plan for reporting purposes

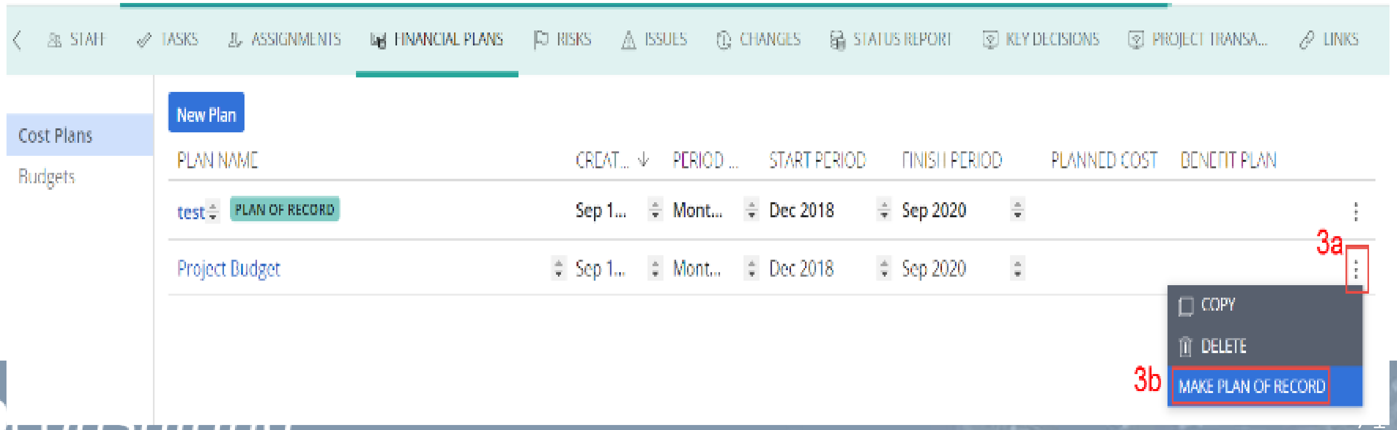
Create a Budget Plan

1. On the Financial Plans tab within your project
2. To get to the list of Cost Plans page, press the Plan List icon



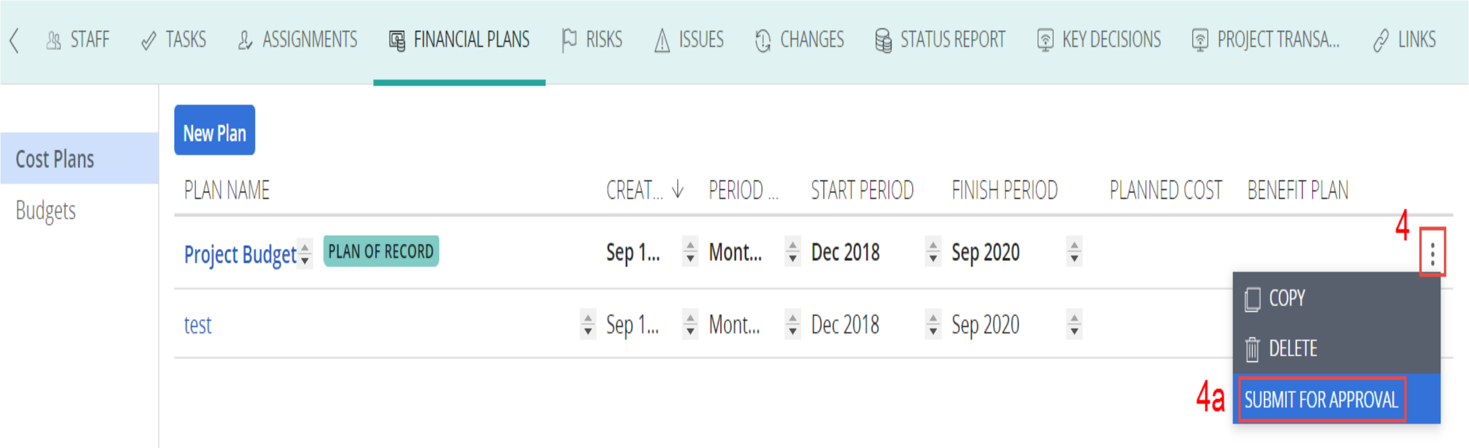
3. Confirm the appropriate Cost Plan is set as the Plan of Record
   a. If the Plan of Record indicator is missing from your cost plan, press the 3 dots on the right hand side of the FJW cost plan row
   b. Select Make Plan of Record from the drop down menu



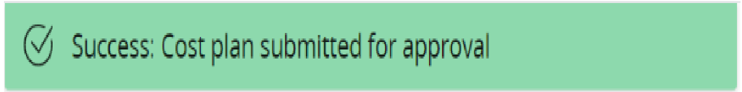


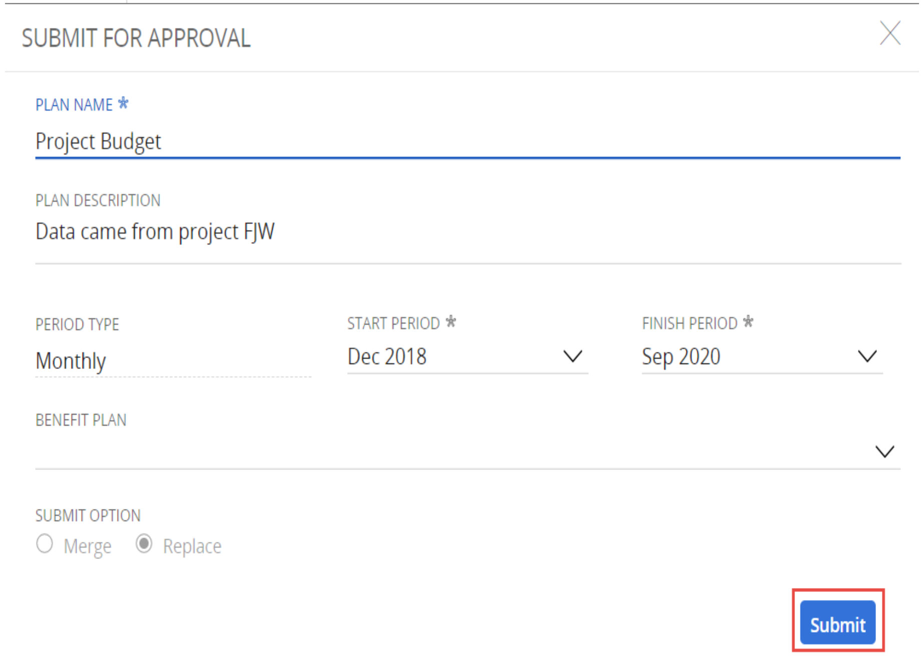
Create a Budget Plan (2)

4. Press the 3 dots again on the right hand side of the Cost Plan of Record row
    a. Select Submit for Approval from the drop down menu



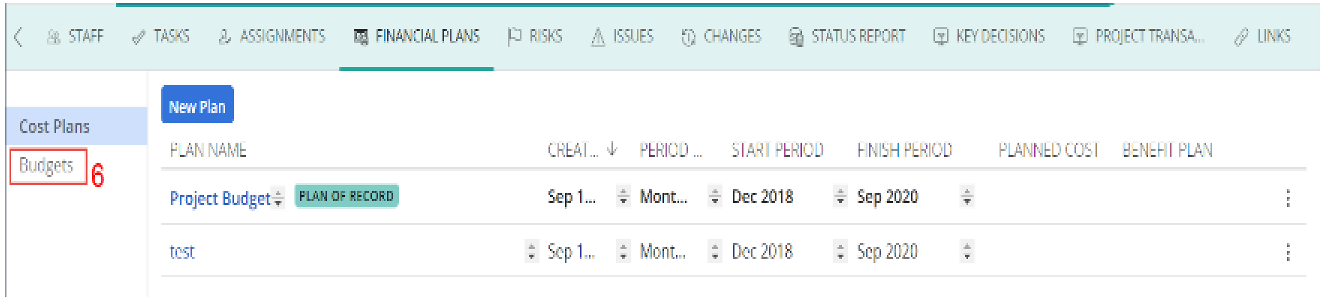
5. Confirm the details for your budget and press Submit
    a. You will see the Success status message at the top of your window



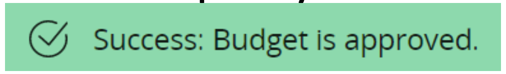


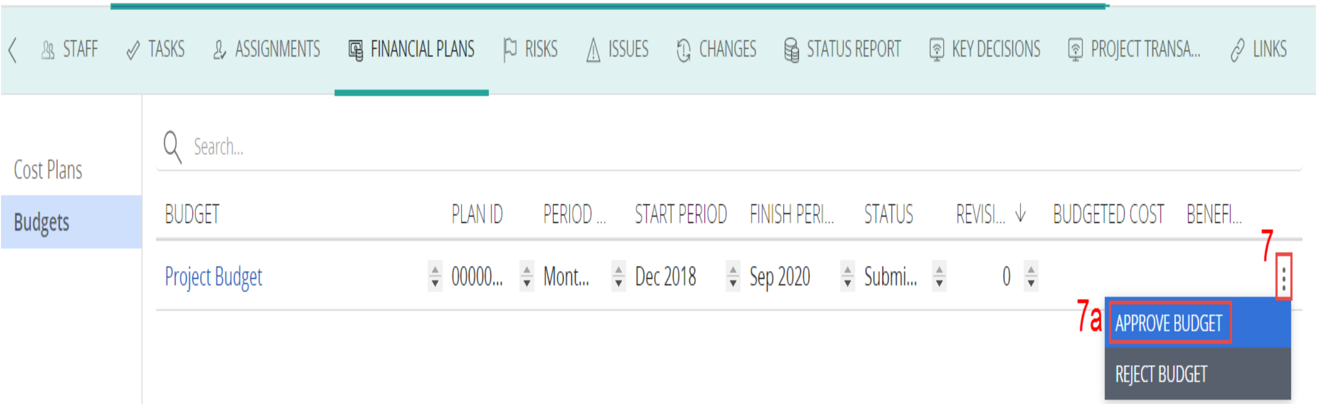
Create a Budget Plan (3)

6. On the cost plans list page, select Budgets on the left hand side

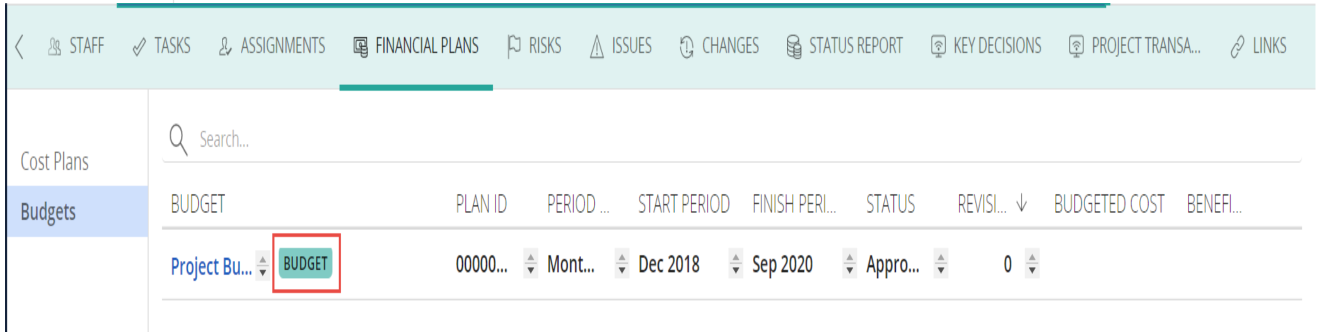


7. Press the 3 dots on the right hand side of the appropriate budget row
   a. Select Approve Budget
   b. You will see the Success status message at the top of your window





8. You will now see the Budget icon next to your finalized budget in the Budgets section of your Financial Plans tab



Exercise

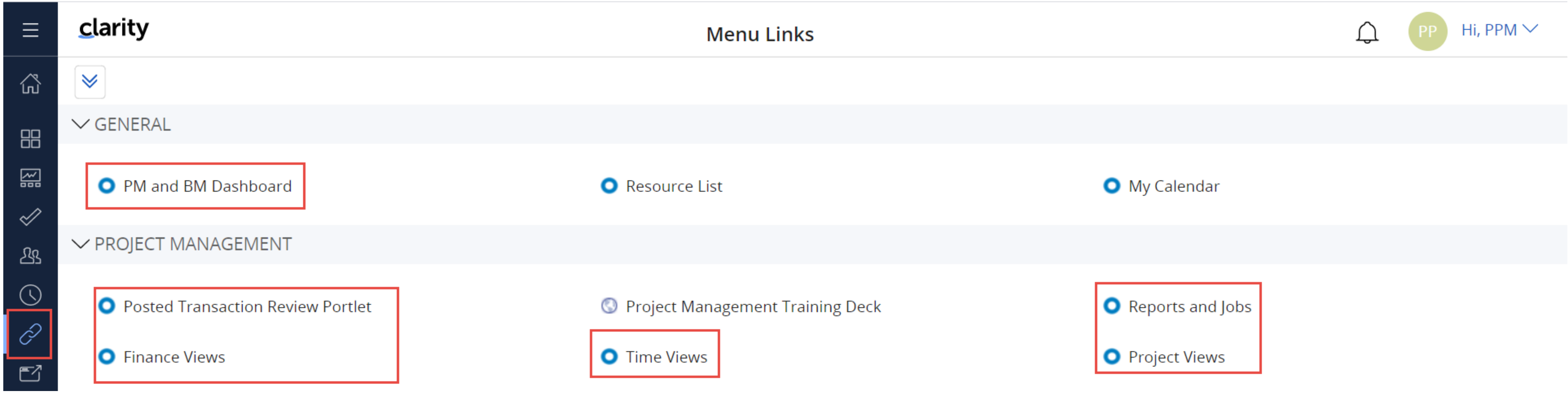
- Submit a cost plan of Record for approval
- Navigate to Budget Plans
- Approve the submitted cost plan
- Review the details of the approved budget plan

- Time: 10 minutes

Part 10: Portlets and Reports

Portlets and Reports

- On the left hand navigation press the Menu Links icon
- This will take you to reports and portlets in Classic Clarity PPM



Part 11: Closing a Project

Closing the Project

1. Ensure all Risks, Issues and Change Requests are set to Closed

Notify the Portfolio Management team when it is time to close your project in PPM. They will run a process to perform the following:

2. On the Staff tab, change any future allocation Finish dates to the current date or earlier

3. On the Tasks tab, update all task statuses to Completed. Also, update the Finish Date on any unfinished or future tasks and assignments to the current date. Chane Resource ETCs to be 0.

4. Ensure the Project End Date is set to current date on the Project Summary page

Appendix: Timesheets

How to Submit Timesheets

1. Click the timesheet icon on the left navigation panel.

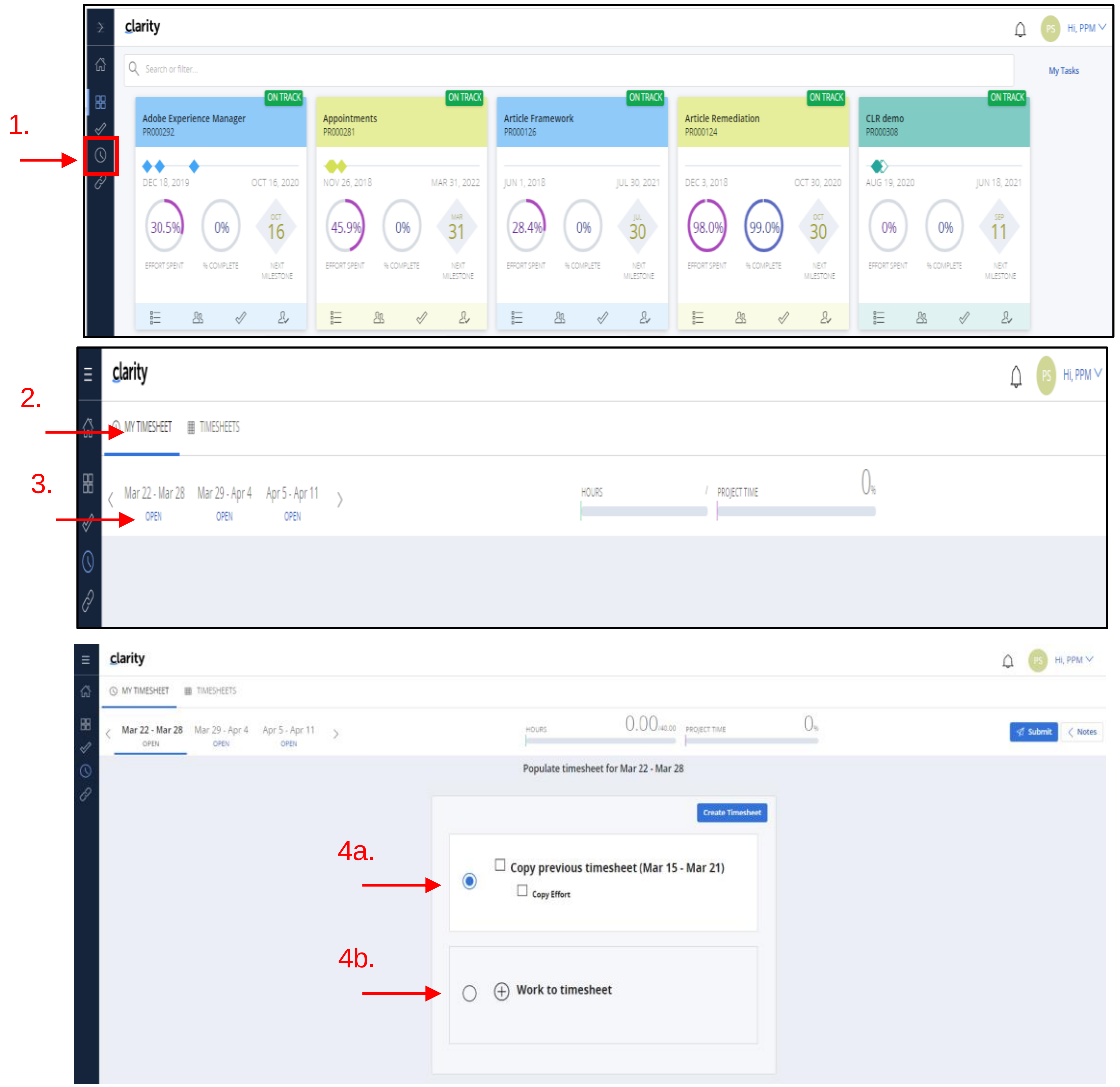
2. The Current Timesheet page will open.

3. Click on OPEN under the week of the timesheet you want to create/update.

4. You will be given an option:

   a. Click on the radio button to "Copy Previous timesheet (mmm dd – mmm dd)" then click on the check boxes, then click on "Create Timesheet".

   b. Click the radio button "Work in timesheet" then click on "Create Timesheet".



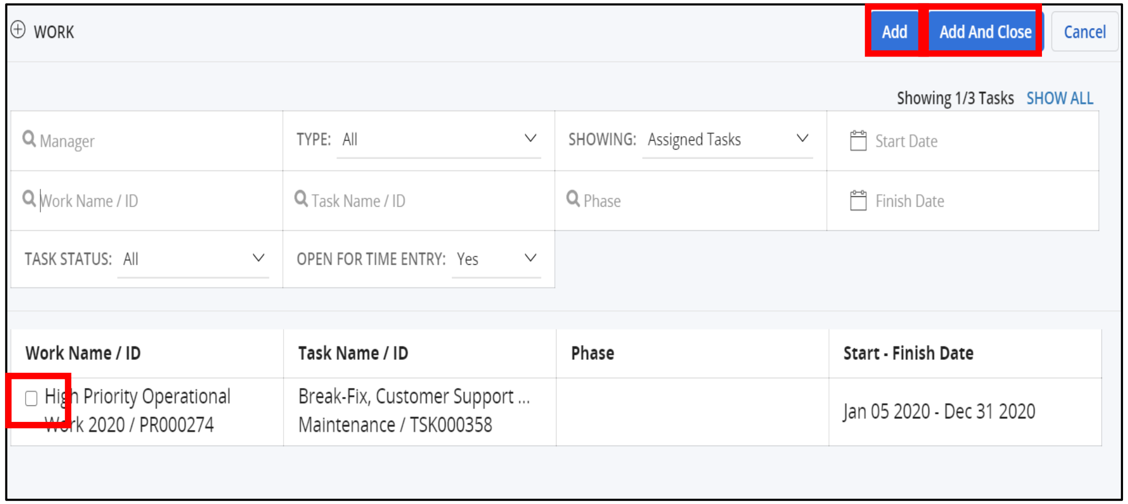
Adding Project Tasks to Timesheets

4a. Copy Previous timesheet – This will copy the previous week's timesheet with the same tasks that were entered last week and you can adjust as needed.

4b. Work in timesheet – This will create a new timesheet. The top section are filters you can use to find your assigned tasks. Click on the check box for the task(s) you want to add to the timesheet.

- Click on the checkbox next to the task that you want to add to the timesheet.
- Click on Add to add the task to your new timesheet and allow you to add more or search for additional tasks. OR
- Click on Add And Close to add the task(s) to your new timesheet and close the window.

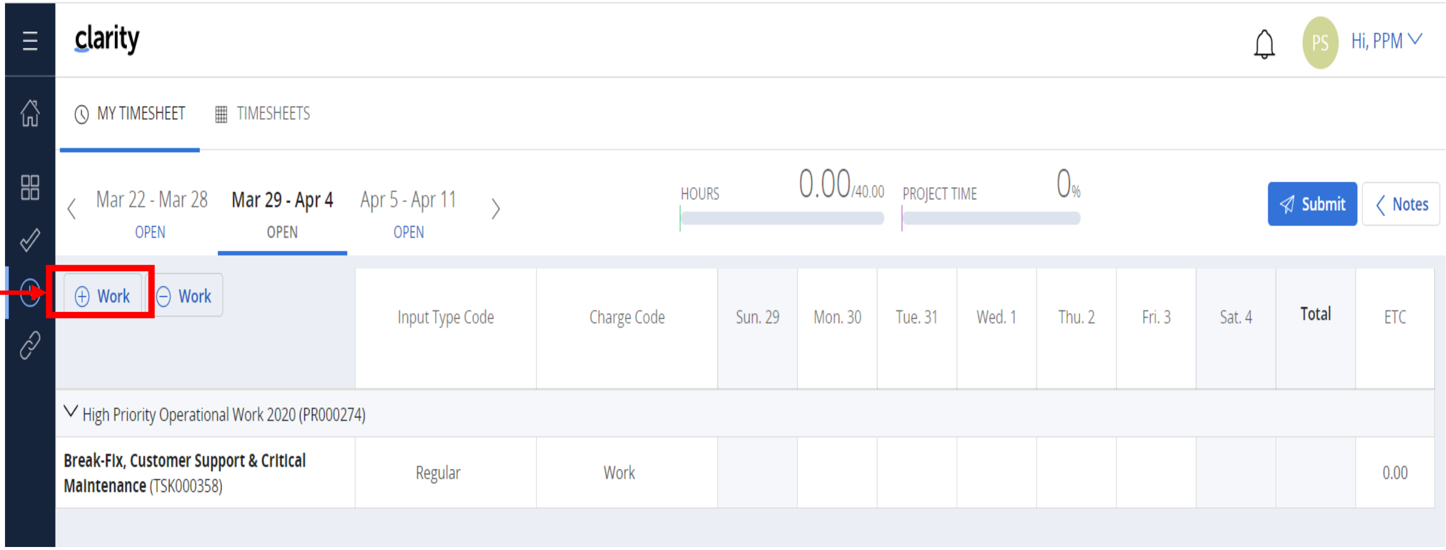
NOTE: If there are tasks missing from this list, reach out the PM to add you to the project/tasks.



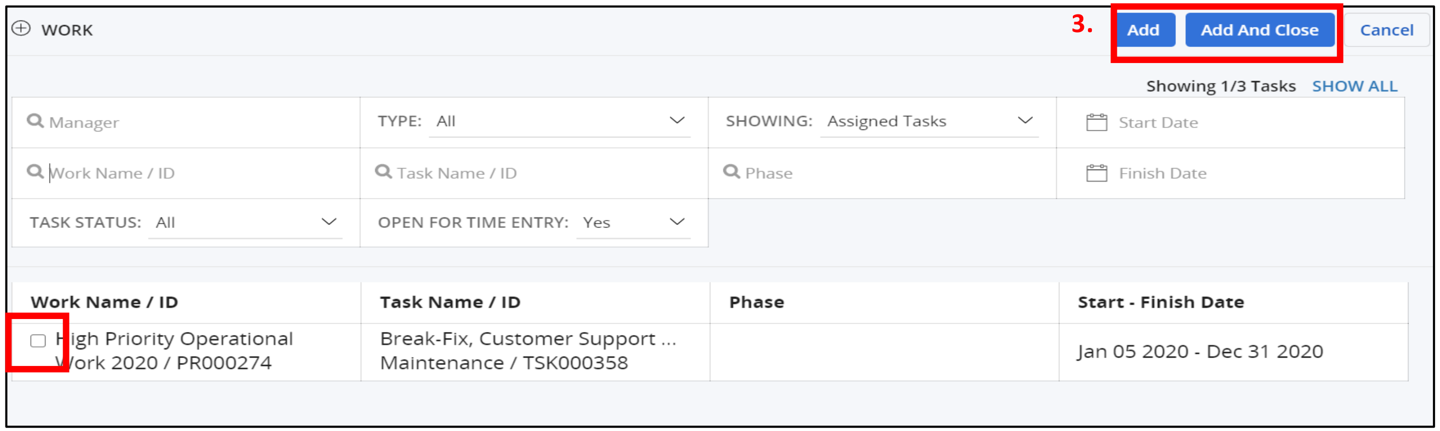
Add more Tasks Individually

To add more tasks to the Timesheet, click ⊕ Work to open the task/filter page
(see slide 75: 4b. “Work in timesheet”)

1. Select the task by clicking in the box next to the task.

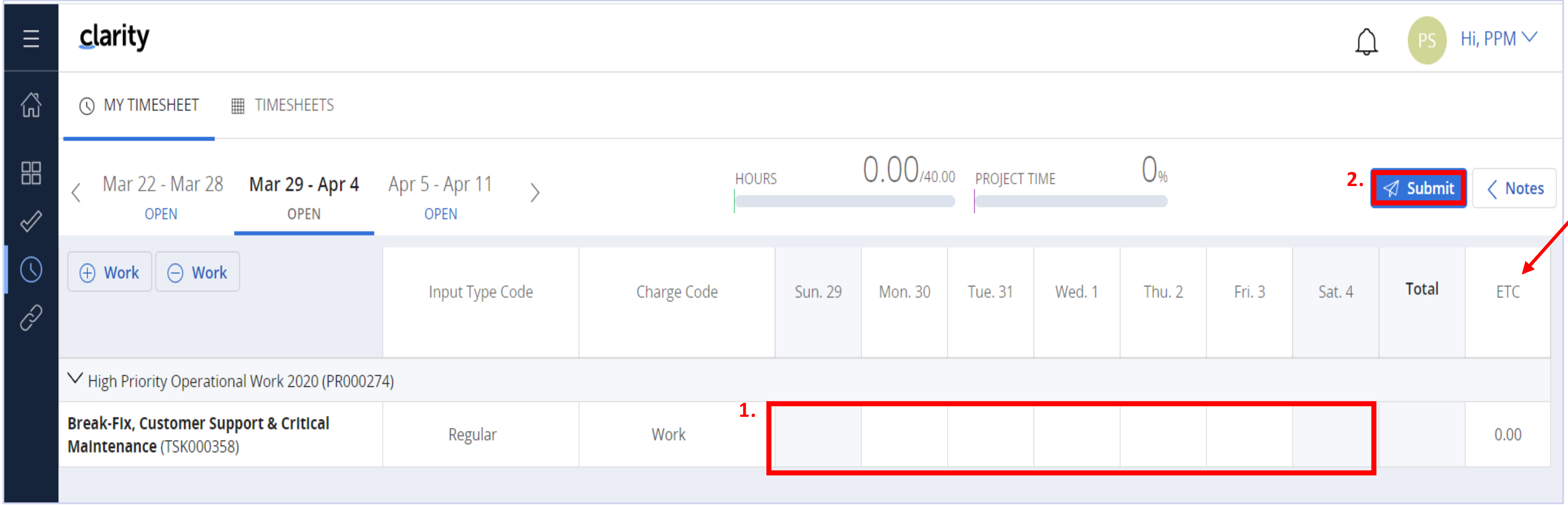


2. Click Add, or Add and Close if you have multiple pages.
3. The task is added to the Timesheet.



Entering Time

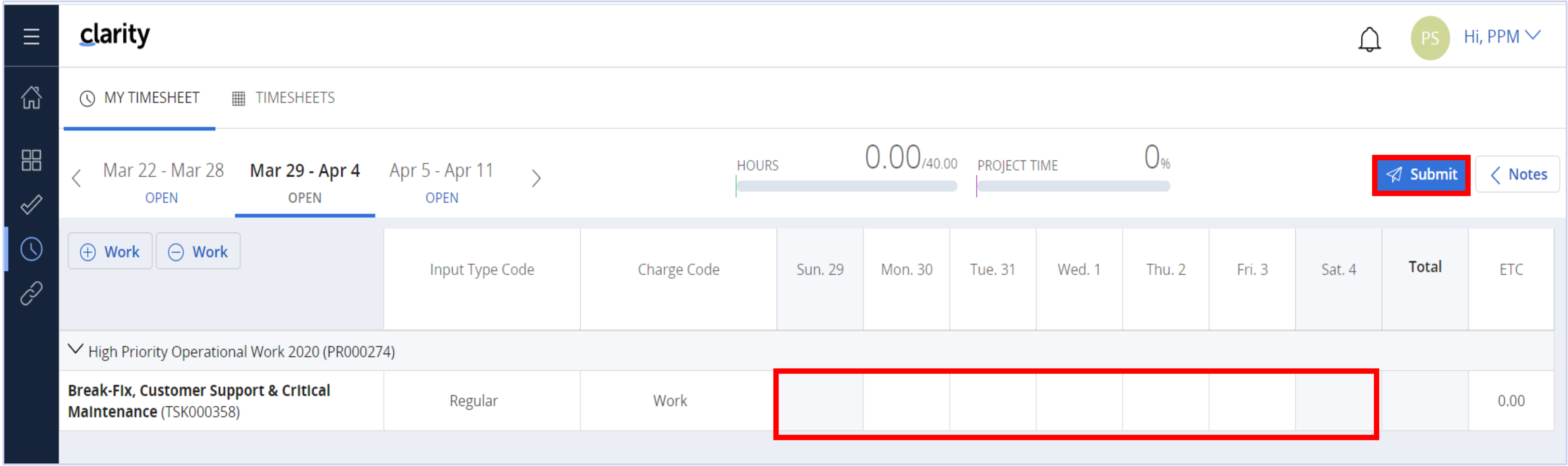
1. The timesheet has a cell for each task under each day of the week. **Enter hours under each day** for all of the projects you worked on that day.
2. Click **Submit** to record the hours to your timesheet.
3. Click **Cancel** to exit.



Tip: You can update the **Estimate to Complete (ETC)** field if needed.

Add Hours to Tasks

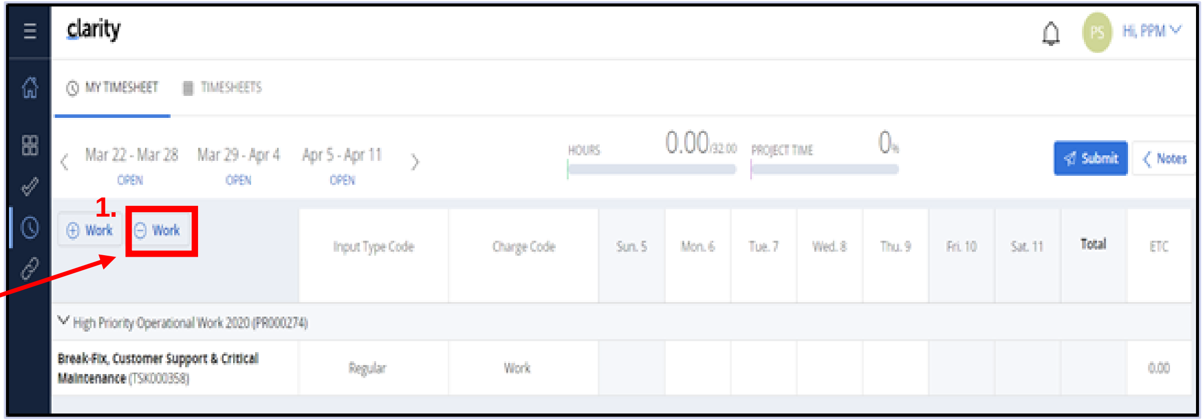
1. When the new timesheet is opened, it will include all the tasks that you added to the timesheet in 4b above.
2. From here add the hours worked on each task for each day.
3. When you have added all your hours, click on Submit to submit the timesheet for approval.

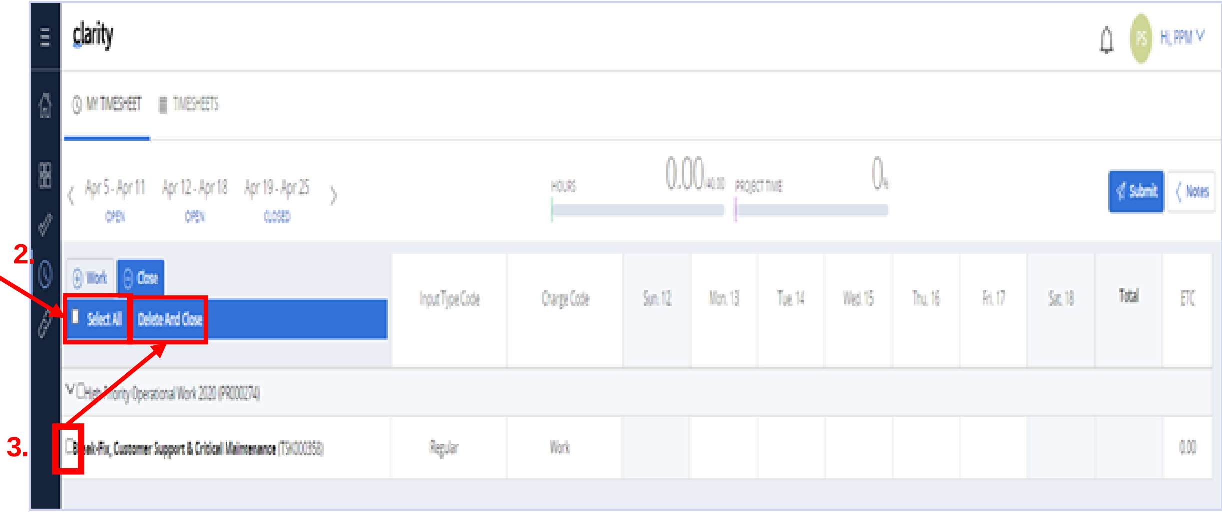


Deleting a Task

- When you delete a task from your timesheet, you are not deleting it from the project, you are simply removing it from your timesheet.

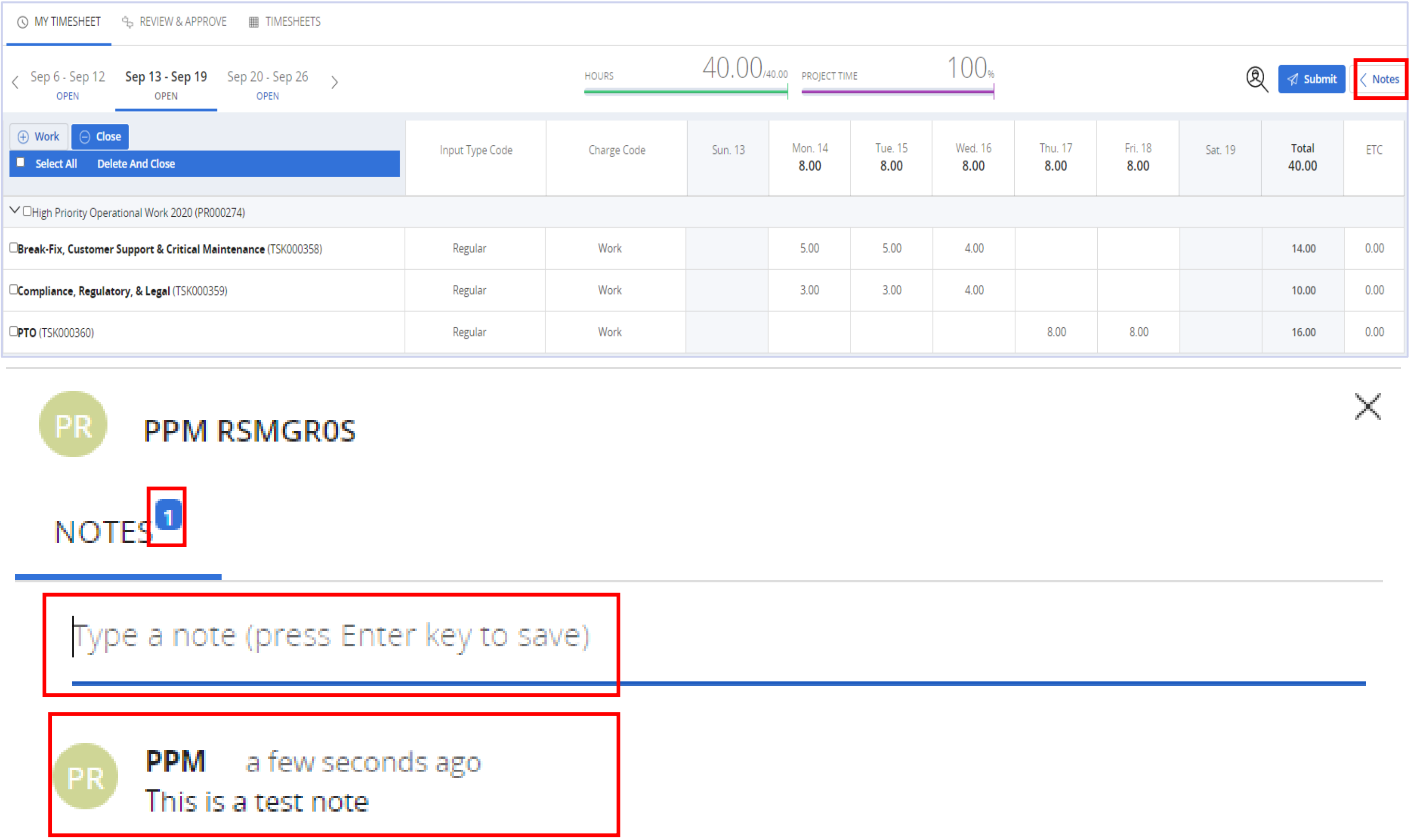
- To delete a task from the timesheet:
  1. Click on the "Delete work" icon. ⊖ Work
  2. Click on the Select All icon ■ Select All to delete all tasks on the timesheet and close the "Delete work" box.
  3. Or you can click delete an individual task by clicking on the checkbox next to each task that you want to delete, then click Delete And Close which will delete the selected tasks from the time sheet and close the "Delete work" box.





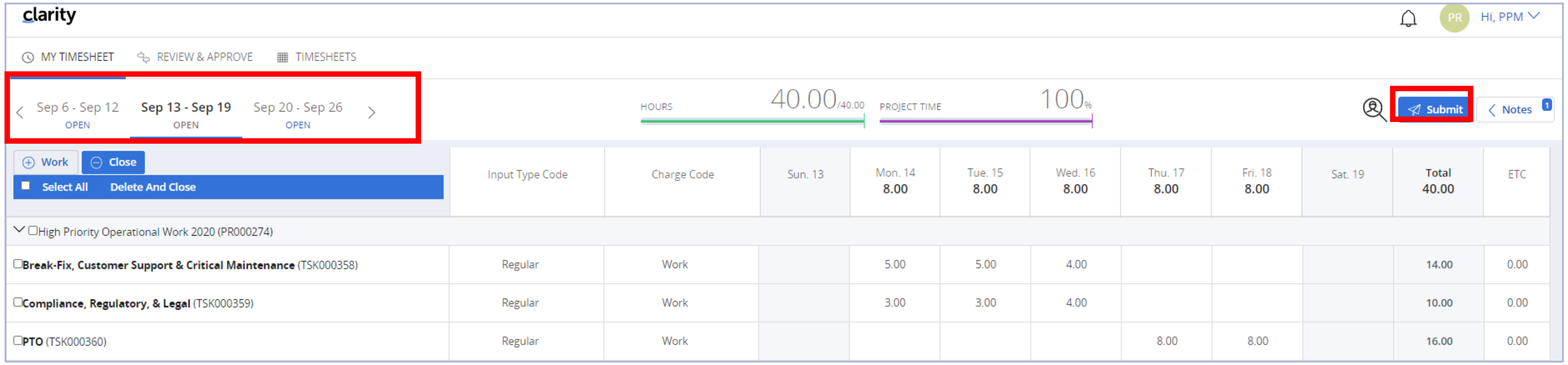
Using Timesheet Notes

- *Timesheet Notes* are generated by clicking on the Notes icon in the top right corner of the timesheet.
- Enter the **text of the note** in the **Note field**.
- Clarity PPM will show the number of notes for the timesheet and show all notes below the freeform text box.
- Click to close the notes box



Submit for Approval

- Once you have entered time for the week, it is necessary to submit it to your manager for approval.
- If you would like to view your submitted timesheet, go to that week’s period

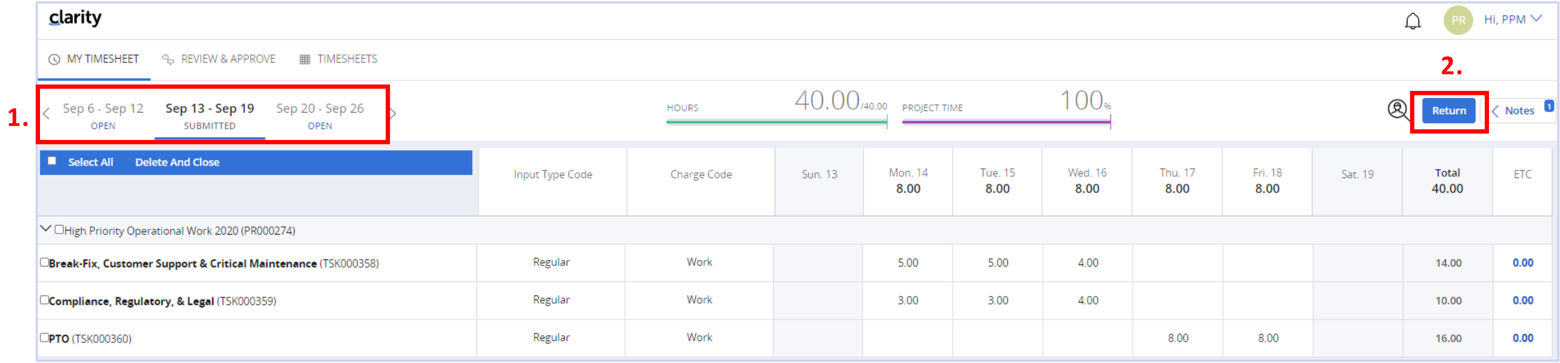


Timesheet Adjustment Overview

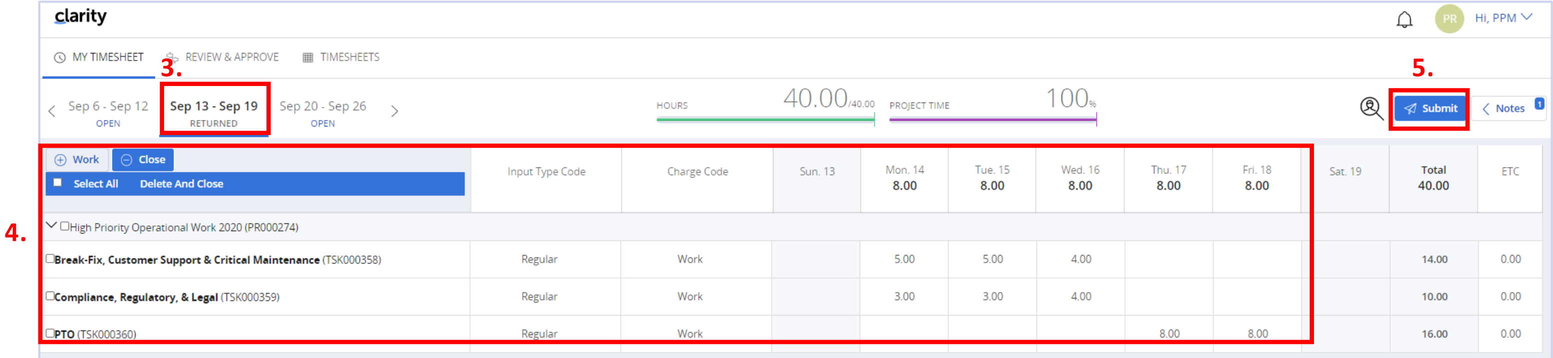
- Once the timesheet is posted, a timesheet adjustment must occur in order to update the timesheet.
- NO adjustments can be made after the time period is closed, which is two weeks after initial submission.
- By creating an adjustment timesheet, you are creating a copy of the original timesheet. Two versions of the timesheet will then exist: the original timesheet (Adjusted) and the new, modified timesheet (Adjustment).
- Adjustments are approved like regular timesheets for open time periods.
- Adjustment timesheets must be submitted in order to be reviewed and approved.
- Users can perform their own adjustments, or their Timesheet Approver can make the adjustment.

Returning a Timesheet for Yourself

- If you made a mistake on your timesheet and would like to return it to yourself:
  1. Click on the appropriate timesheet in the list to be Returned.
  2. Click **Return** on the opened Timesheet.



  3. Status will change to **Returned**.
  4. Make adjustments to hours/tasks as needed.
  5. Click **Submit** for to submit it to your manager for approval.



6. Status will change back to Submitted.