

Managing Projects with Clarity PPM

Version 15.8.1

Your Guide: Christi Rice

- 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

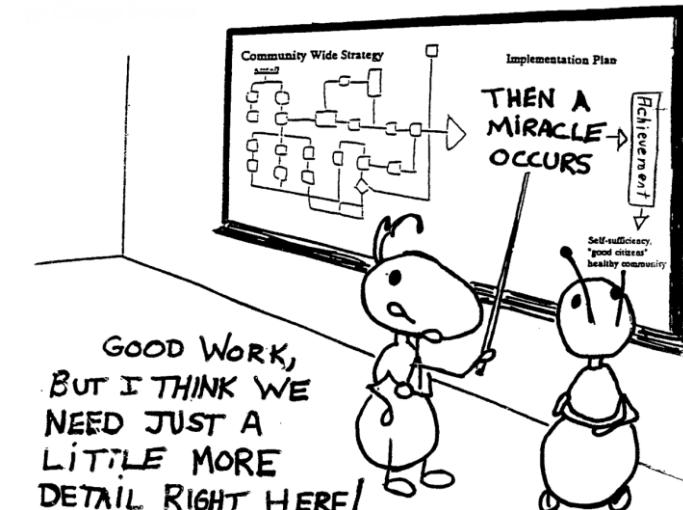
Agenda



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

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

The image contains two screenshots. The top screenshot shows a sign-in page for 'DISCOUNT TIRE' with a logo of two deer. It has fields for 'Username' (605386) and 'Password' (redacted), a 'Remember me' checkbox, and a 'Sign In' button. The bottom screenshot shows a 'User Home' page in a web browser with a red header. The header includes the 'DISCOUNT TIRE' logo and a 'Launch App' button. Below the header is a 'Work' section containing three app icons: 'Clarity PPM' (selected), 'Atlassian', and 'ManageEngine'. The browser's address bar shows 'discounttire.okta.com/app/UserHome' and the title bar shows the URL.

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



- Staffing



- Projects – Tiles



- Timesheets



- Projects – List



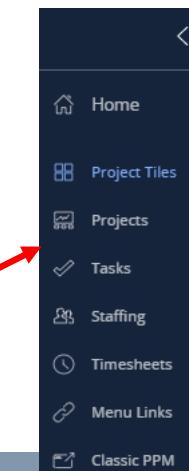
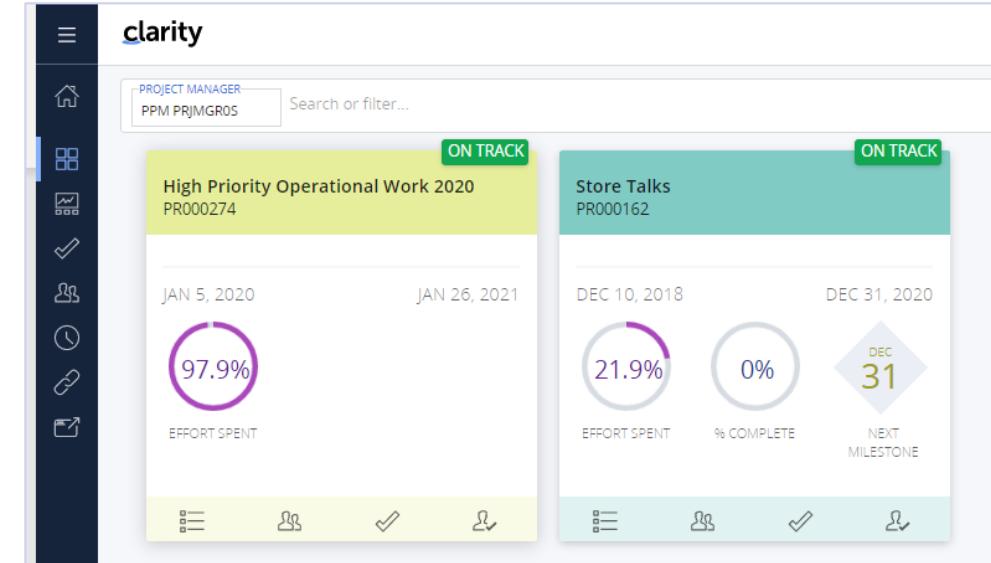
- Menu Links



- Tasks



- 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

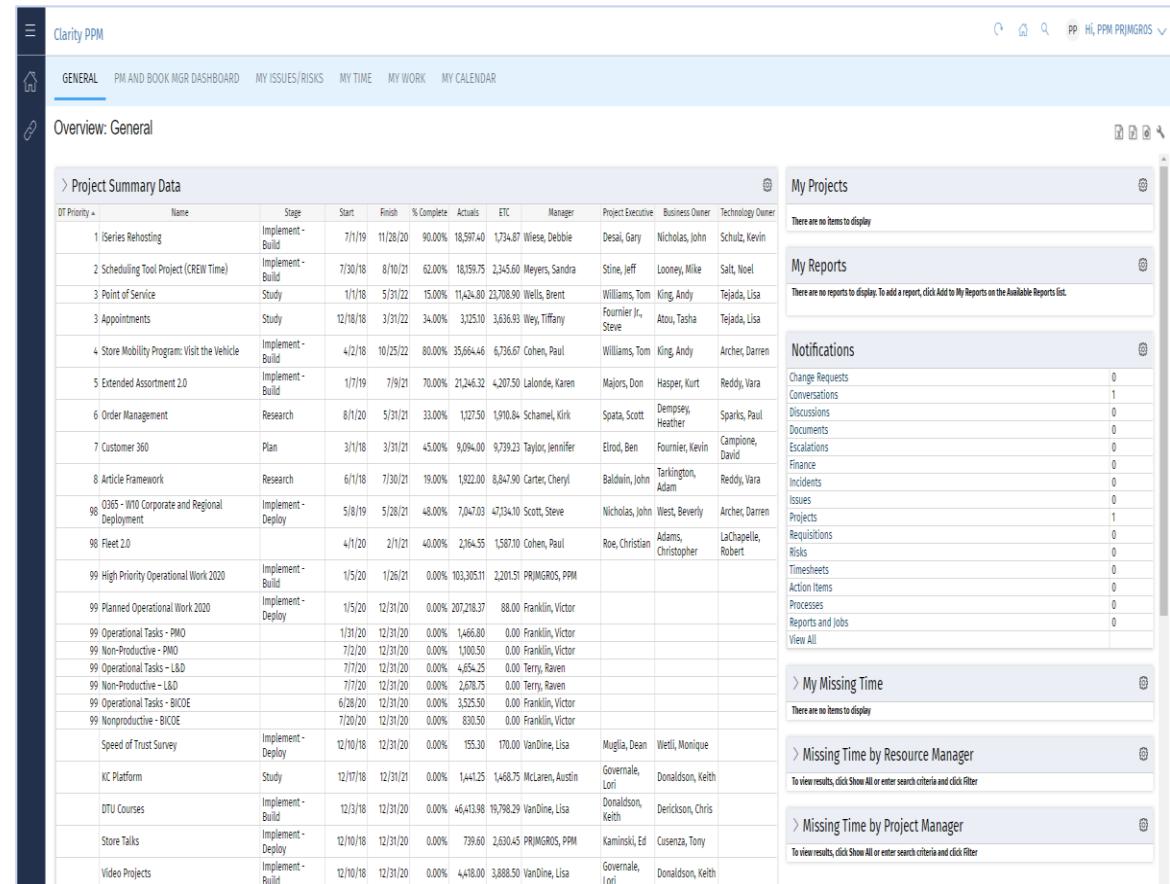
Differences - New UI vs Phoenix View

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 



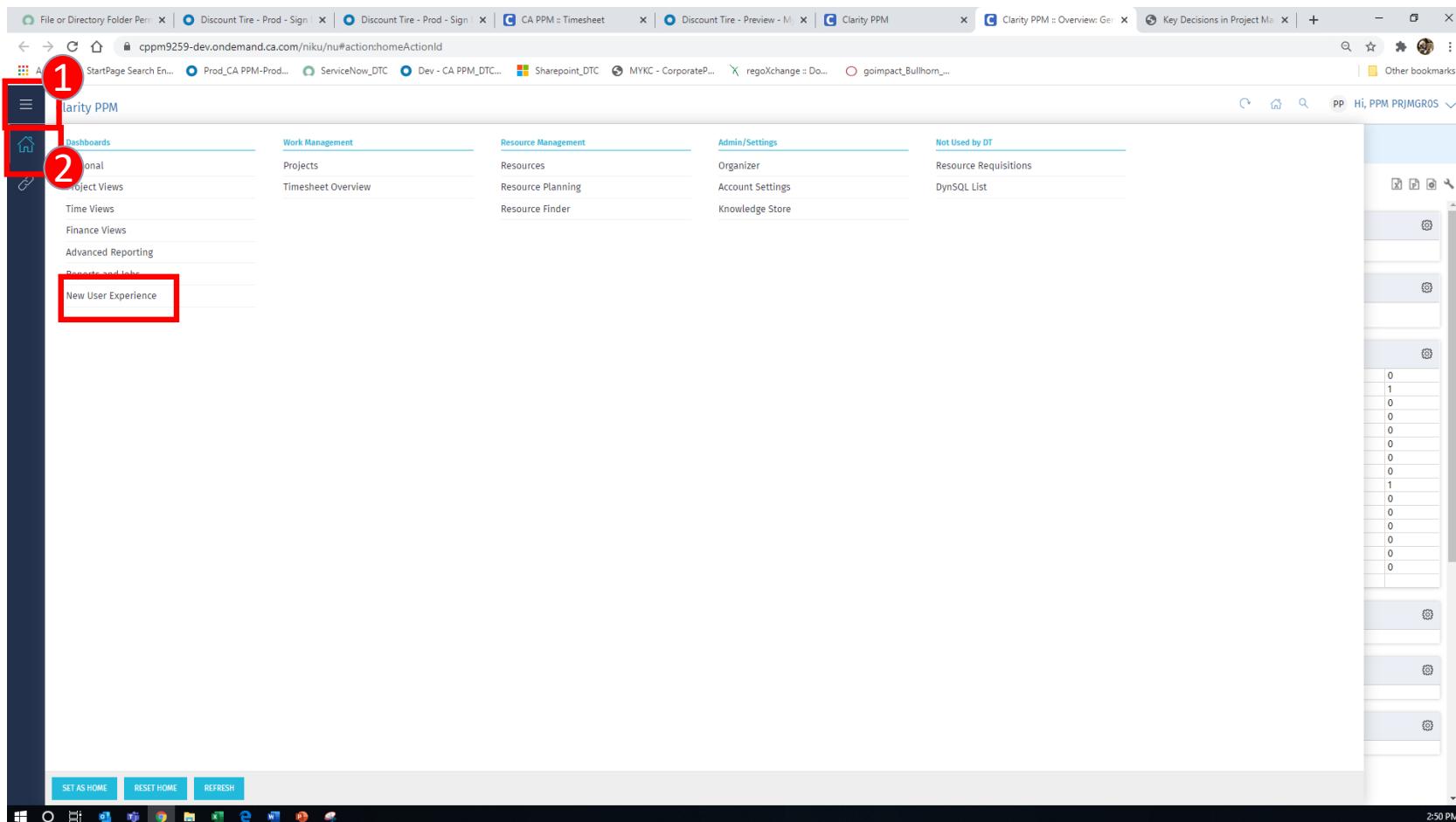
DT Priority	Name	Stage	Start	Finish	% Complete	Actuals	ETC	Manager	Project Executive	Business Owner	Technology Owner
1	iSeries Relo	Implement - Build	7/1/19	11/28/20	90.00%	18,597.40	1,734.87	Wiese, Debbie	Desai, Gary	Nicholas, John	Schulz, Kevin
2	Scheduling Tool (CREW Time)	Implement - Build	7/30/18	8/10/21	62.00%	18,595.75	2,345.60	Meyers, Sandra	Stine, Jeff	Looney, Mike	Salt, Noel
3	Point of Service	Study	1/1/18	5/31/22	15.00%	11,424.80	23,708.90	Wells, Brent	Williams, Tom	King, Andy	Tejada, Lisa
3	Appointments	Study	12/18/18	3/31/22	34.00%	3,125.10	3,636.93	Wey, Tiffany	Fournier Jr., Steve	Atou, Tasha	Tejada, Lisa
4	Store Mobility Program: Visit the Vehicle	Implement - Build	4/2/18	10/25/22	80.00%	35,664.46	6,736.67	Cohen, Paul	Williams, Tom	King, Andy	Archer, Darren
5	Extended Assortment 2.0	Implement - Build	1/7/19	7/9/21	70.00%	21,246.32	4,207.50	Lalonde, Karen	Majors, Don	Hasper, Kurt	Reddy, Vara
6	Order Management	Research	8/1/20	5/31/21	33.00%	1,127.50	1,910.84	Shamel, Kirk	Spata, Scott	Dempsey, Heather	Sparks, Paul
7	Customer 360	Plan	3/1/18	3/31/21	45.00%	9,094.00	9,739.23	Taylor, Jennifer	Elrod, Ben	Fournier, Kevin	Campione, David
8	Article Framework	Research	6/1/19	7/30/21	19.00%	1,622.00	8,847.90	Carter, Cheryl	Baldwin, John	Tarkington, Adam	Reddy, Vara
98	Q365 - WIO Corporate and Regional Deployment	Implement - Deploy	5/8/19	5/28/21	48.00%	7,047.03	4734.10	Scott, Steve	Nicholas, John	West, Beverly	Archer, Darren
98	Fleet 2.0	Plan	4/1/20	2/1/21	40.00%	2,164.55	1,587.10	Cohen, Paul	Roe, Christian	Adams, Christopher	LaChapelle, Robert
99	High Priority Operational Work 2020	Implement - Build	1/5/20	1/26/21	0.00%	103,305.11	1,201.51	PRJMGROS, PPM			
99	Planned Operational Work 2020	Implement - Deploy	1/5/20	12/31/20	0.00%	207,218.37	88.00	Franklin, Victor			
99	Operational Tasks - PMO	Plan	1/31/20	12/31/20	0.00%	1,466.00	0.00	Franklin, Victor			
99	Non-Productive - PMO	Plan	7/2/20	12/31/20	0.00%	1,100.50	0.00	Franklin, Victor			
99	Operational Tasks - L&D	Plan	7/7/20	12/31/20	0.00%	4,654.25	0.00	Terry, Raven			
99	Non-Productive - L&D	Plan	7/7/20	12/31/20	0.00%	2,678.75	0.00	Terry, Raven			
99	Operational Tasks - BICOE	Plan	6/28/20	12/31/20	0.00%	3,525.50	0.00	Franklin, Victor			
99	Nonproductive - BICOE	Plan	7/20/20	12/31/20	0.00%	830.50	0.00	Franklin, Victor			
	Speed of Trust Survey	Implement - Deploy	12/10/18	12/31/20	0.00%	155.30	170.00	VanDine, Lisa	Muglia, Dean	Wetli, Monique	
	KC Platform	Study	12/17/18	12/31/21	0.00%	1,441.25	1,468.75	McLaren, Austin	Governale, Lori	Donaldson, Keith	
	DTU Courses	Implement - Build	12/3/18	12/31/20	0.00%	46,413.98	19,798.29	VanDine, Lisa	Donaldson, Keith	Derickson, Chris	
	Store Talks	Implement - Deploy	12/10/18	12/31/20	0.00%	739.60	2,630.45	PRJMGROS, PPM	Kaminski, Ed	Cusenza, Tony	
	Video Projects	Implement - Build	12/10/18	12/31/20	0.00%	4,418.00	3,888.50	VanDine, Lisa	Governale, Lori	Donaldson, Keith	

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



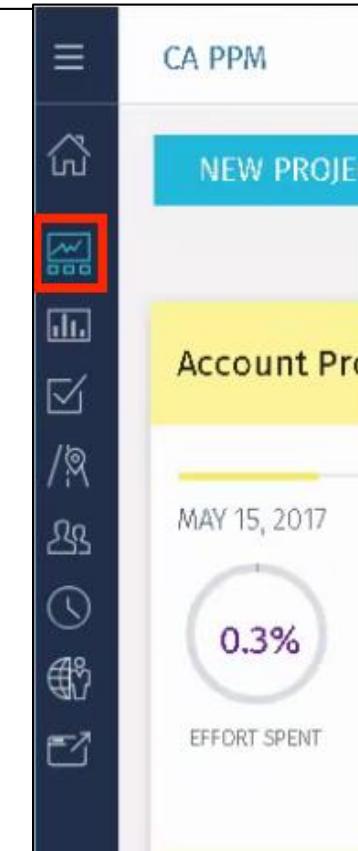


Part 3: Accessing Projects

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.



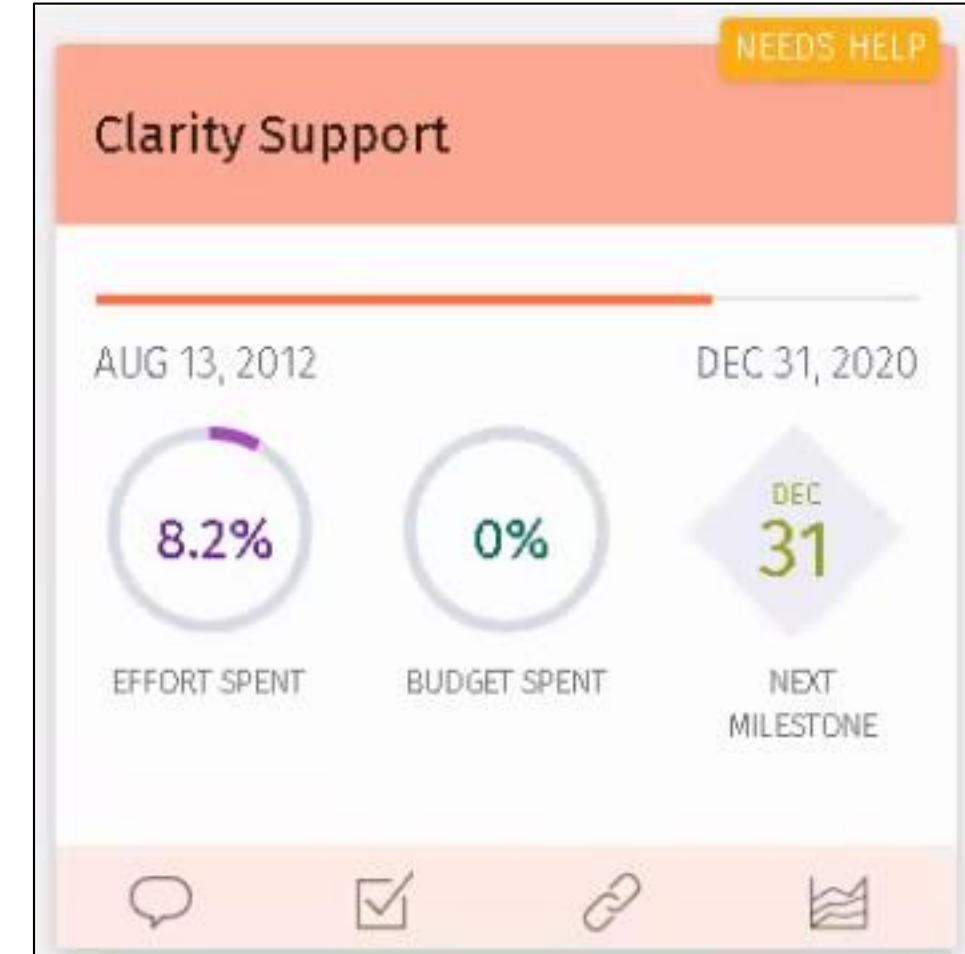
Projects View

- 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.



clarity

Projects

Search... VIEW UNSAVED CLR View

DT Priority	*Name	Manager	*Start	*Finish	Actuals ↓	Planned Cost	Planned Capital Cost	Planned Operating Cost
1	iSeries Rehosting	Wiese, Debbie	Jul 01 2019	Nov 28 2020	18,597	4,919,867	84,748	4,835,119
	Nexus Sales Tax Compliance	Wiese, Debbie	Aug 20 2018	Aug 06 2019	4,949			
	Sunbit Second-Tier Financing	Wiese, Debbie	Jul 29 2020	Nov 23 2020	490	404,656		404,656
	Nexus Sales Tax Compliance (Dec'18)	Wiese, Debbie	Dec 03 2018	Jan 01 2019	251			
	PM Methodology	Wiese, Debbie	Nov 26 2019	Apr 12 2022	178	36,795		36,795
	Nexus Tax Compliance	Wiese, Debbie	Aug 20 2018	Feb 18 2019	0			



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

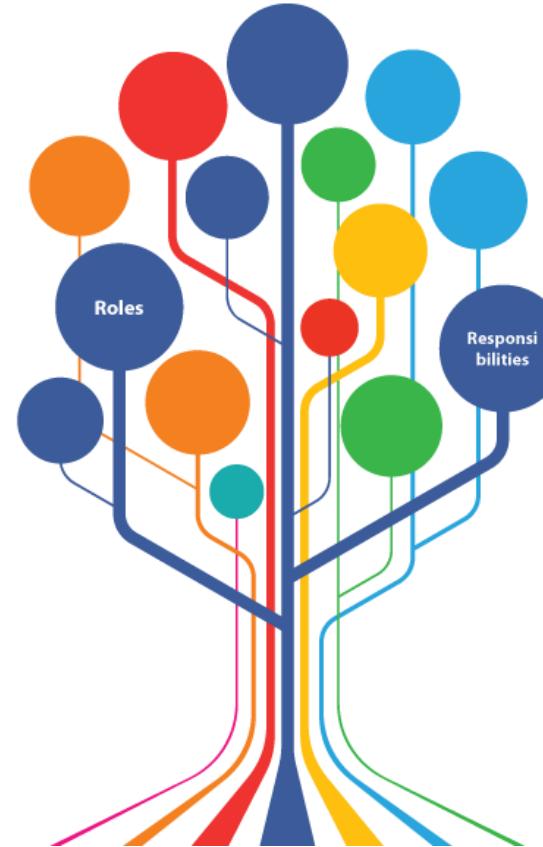
It is important to know the differences between Allocation and Estimate to Complete (ETC)

- 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:

Business Analyst
Business Analyst (2)

- 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.



CA PPM

Clarity Support

ON TRACK

Hi, Susan

CONVERSATIONS

LINKS

STATUS

FINANCIALS

RISKS

ISSUES

CHANGES

DOCUMENTS

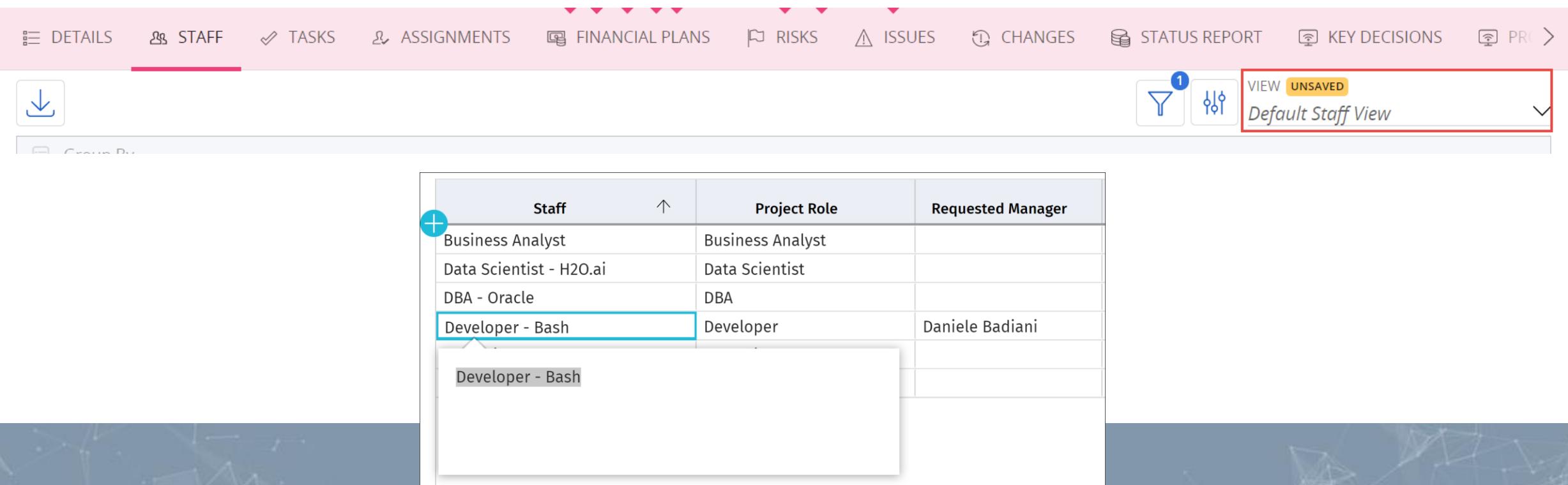
DETAILS

STAFF

Staff	Project Role	Booking St...	Open For Ti...	Start	Finish	Allocation	Actuals	ETC	Default Alloc...
+ Christina Accor...	Business Ana...	Soft	<input type="checkbox"/>	Aug 13 2012	Dec 31 2020	0.00	0.01	0.00	0
Sameen Afridi	Program Man...	Soft	<input checked="" type="checkbox"/>	Aug 13 2012	Dec 31 2020	0.00	0.00	0.07	100.00%
Jessica Apgar	Business Ana...	Soft	<input checked="" type="checkbox"/>	Aug 13 2012	Dec 31 2020	0.02	0.03	0.10	25.00%
Sabrina Ballen	Business Ana...	Soft	<input checked="" type="checkbox"/>	Aug 13 2012	Dec 31 2020	0.01	0.00	0.01	0.00%
Hariprasad Bi...	Developer	Soft	<input checked="" type="checkbox"/>	Aug 13 2012	Dec 31 2020	0.00	0.00	0.01	0.00%
Luann Bridges	Program Man...	Soft	<input type="checkbox"/>	Aug 13 2012	Dec 31 2020	0.00	0.01	0.10	1.00%
Jayhannie Br	Business Ana	Soft	<input checked="" type="checkbox"/>	May 04 2015	Jun 12 2015	1.00	0.45	0.55	100.00%

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



The screenshot shows a software interface with a top navigation bar containing tabs: DETAILS, STAFF, TASKS, ASSIGNMENTS, FINANCIAL PLANS, RISKS, ISSUES, CHANGES, STATUS REPORT, KEY DECISIONS, and PRO. The STAFF tab is selected, indicated by a pink underline. Below the navigation bar is a toolbar with a download icon, a filter icon with a '1' notification, a settings icon, and a dropdown menu labeled 'VIEW UNSAVED Default Staff View'. The main content area is a table with the following data:

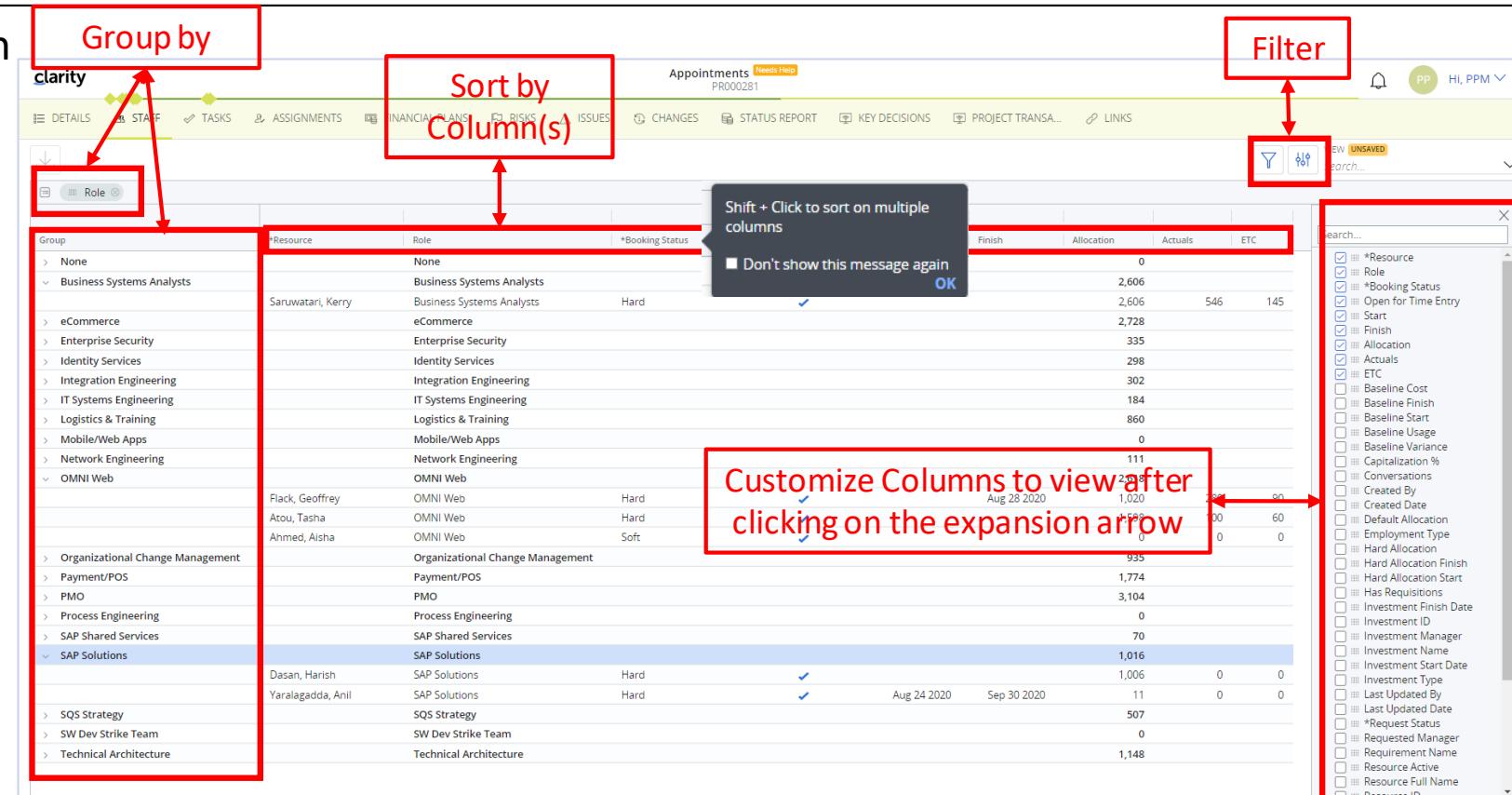
Staff	Project Role	Requested Manager
Business Analyst	Business Analyst	
Data Scientist - H2O.ai	Data Scientist	
DBA - Oracle	DBA	
Developer - Bash	Developer	Daniele Badiani

The row for 'Developer - Bash' is highlighted with a blue border. A tooltip 'Developer - Bash' is visible near the bottom of the table. The background of the interface features a network-like pattern.

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  and select the item you want to filter by
 - **Group Resources** by dragging and dropping a column title in the  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

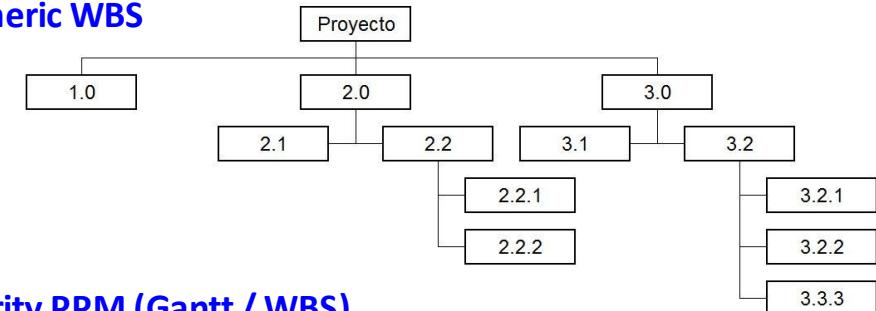


Part 5: Work Breakdown Structure (WBS) & Tasks

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)

The screenshot shows a Gantt chart for the 'iSeries Rehosting' project. The chart lists various tasks with their assigned resources, start and finish dates, duration, status, and completion percentages. The tasks are organized into phases, such as 'Research/Plan Stage' and 'Implement Stage', which correspond to the WBS structure shown above.

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 on



the right to view its properties.

WBS Sort	Name	Start	Finish	Cost Type
1	Talk Content Management	Dec 10 2018	Sep 14 2020	Operating
2	Talk QA, Review, Testing	Dec 12 2018	Sep 14 2020	Operating
3	Talk Video	Aug 21 2019	Aug 21 2019	Operating
4	Talk Reporting	Feb 04 2019	Sep 08 2020	Operating
5	Talk Page Maintenance and Support	Jan 07 2019	Sep 14 2020	Operating
6	Talk Learning Management Admin	Dec 13 2018	Sep 21 2020	Operating
7	Talk Page Development	Dec 20 2018	Apr 20 2020	Operating
8	Talk Meeting	Dec 11 2018	Sep 21 2020	Operating
9	Talk Communications	Dec 31 2018	Sep 14 2020	Operating
10	Talk Project Control	Jan 07 2019	Sep 14 2020	Operating
11	Talk Project Planning	Dec 10 2018	Sep 14 2020	Operating
12	test	Sep 15 2020	Dec 31 2020	Operating

Tasks Tab (2)

- Subsequent tabs allow for:
 - Task “To Do’s”
 - Task Assignments
 - Task properties updates

This screenshot shows the Tasks tab in a project management application. The main area displays a grid of tasks with columns for Name, Start Date, Finish Date, and Cost Type. A sidebar on the right shows task assignments for users Elisabeth and Matthew.

WBS Sort	Name	Start	Finish	Cost Type
1	Talk Content Management	Dec 10 2018	Sep 14 2020	Operating
2	Talk QA, Review, Testing	Dec 12 2018	Sep 14 2020	Operating
3	Talk Video	Aug 21 2019	Aug 21 2019	Operating
4	Talk Reporting	Feb 04 2019	Sep 08 2020	Operating
5	Talk Page Maintenance and Support	Jan 07 2019	Sep 14 2020	Operating
6	Talk Learning Management Admin	Dec 13 2018	Sep 21 2020	Operating
7	Talk Page Development	Dec 20 2018	Apr 20 2020	Operating
8	Talk Meeting	Dec 11 2018	Sep 21 2020	Operating
9	Talk Communications	Dec 31 2018	Sep 14 2020	Operating
10	Talk Project Control	Jan 07 2019	Sep 14 2020	Operating
11	Talk Project Planning	Dec 10 2018	Sep 14 2020	Operating
12	test	Sep 15 2020	Dec 31 2020	Operating

This screenshot shows the Tasks tab with a sidebar for task properties. The sidebar includes fields for WBS Sort, Name, Start Date, Finish Date, Cost Type, and other details like Status and Duration.

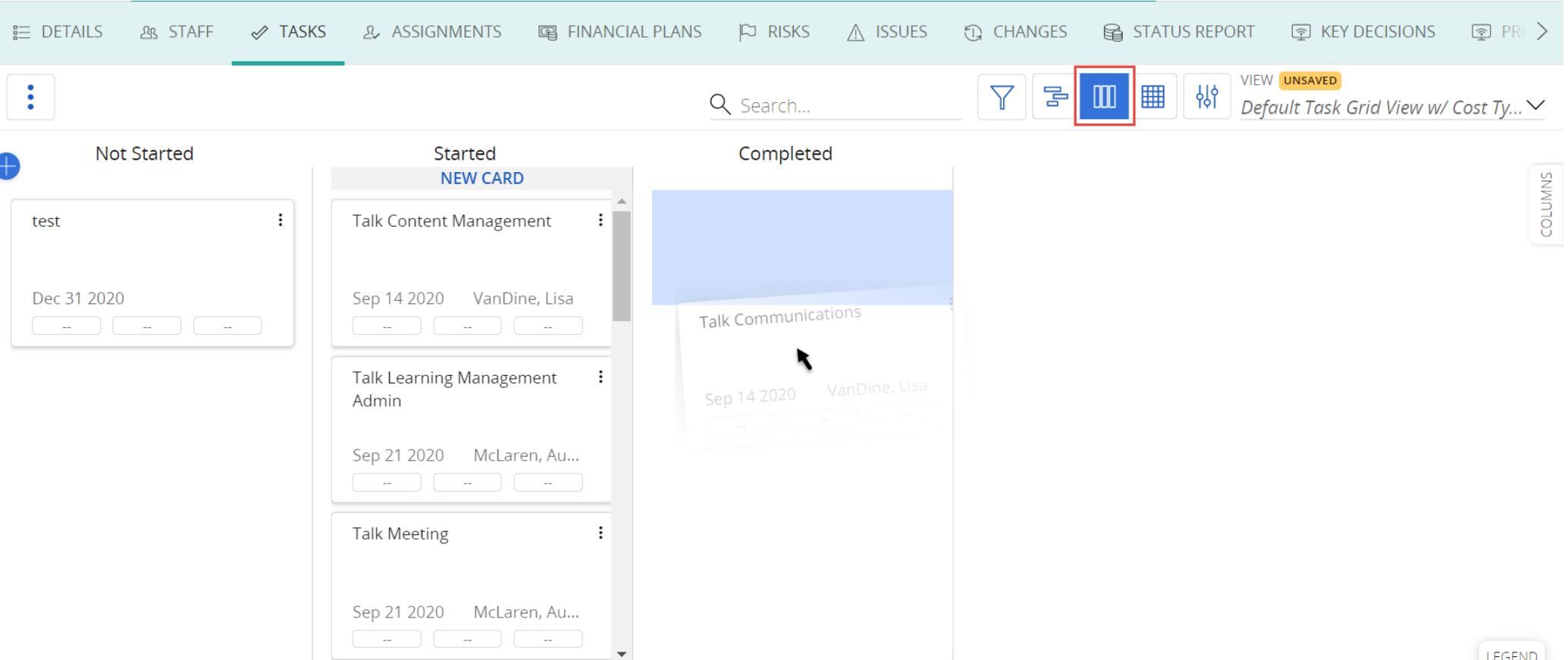
WBS Sort	Name	Start	Finish	Cost Type
1	Talk Content Management	Dec 10 2018	Sep 14 2020	Operating
2	Talk QA, Review, Testing	Dec 12 2018	Sep 14 2020	Operating
3	Talk Video	Aug 21 2019	Aug 21 2019	Operating
4	Talk Reporting	Feb 04 2019	Sep 08 2020	Operating
5	Talk Page Maintenance and Support	Jan 07 2019	Sep 14 2020	Operating
6	Talk Learning Management Admin	Dec 13 2018	Sep 21 2020	Operating
7	Talk Page Development	Dec 20 2018	Apr 20 2020	Operating
8	Talk Meeting	Dec 11 2018	Sep 21 2020	Operating
9	Talk Communications	Dec 31 2018	Sep 14 2020	Operating
10	Talk Project Control	Jan 07 2019	Sep 14 2020	Operating
11	Talk Project Planning	Dec 10 2018	Sep 14 2020	Operating
12	test	Sep 15 2020	Dec 31 2020	Operating

This screenshot shows the Tasks tab with a sidebar for task properties, including configuration options for WBS Sort, Start Date, Cost Type, and other details.

WBS Sort	Name	Start	Finish	Cost Type
1	Talk Content Management	Dec 10 2018	Sep 14 2020	Operating
2	Talk QA, Review, Testing	Dec 12 2018	Sep 14 2020	Operating
3	Talk Video	Aug 21 2019	Aug 21 2019	Operating
4	Talk Reporting	Feb 04 2019	Sep 08 2020	Operating
5	Talk Page Maintenance and Support	Jan 07 2019	Sep 14 2020	Operating
6	Talk Learning Management Admin	Dec 13 2018	Sep 21 2020	Operating
7	Talk Page Development	Dec 20 2018	Apr 20 2020	Operating
8	Talk Meeting	Dec 11 2018	Sep 21 2020	Operating
9	Talk Communications	Dec 31 2018	Sep 14 2020	Operating
10	Talk Project Control	Jan 07 2019	Sep 14 2020	Operating
11	Talk Project Planning	Dec 10 2018	Sep 14 2020	Operating
12	test	Sep 15 2020	Dec 31 2020	Operating

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

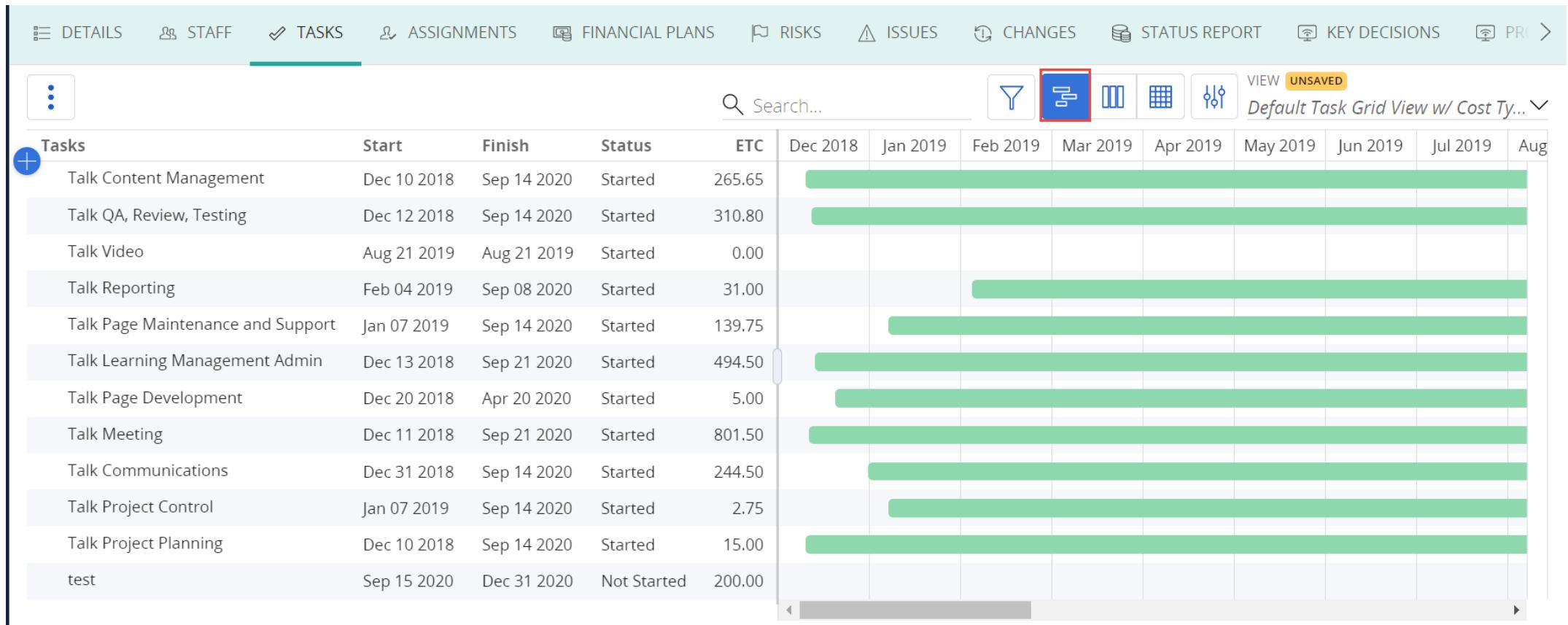


The screenshot shows a Kanban Task Board interface with the following details:

- Top Navigation:** DETAILS, STAFF, TASKS (highlighted in green), ASSIGNMENTS, FINANCIAL PLANS, RISKS, ISSUES, CHANGES, STATUS REPORT, KEY DECISIONS, and PROGRESS.
- Search and Filters:** A search bar with placeholder "Search..." and filter icons (magnifying glass, funnel, etc.).
- View Options:** VIEW UNSAVED and a dropdown menu for "Default Task Grid View w/ Cost Ty...".
- Columns:** The board is divided into three columns: Not Started, Started, and Completed.
- Not Started Column:** Contains one card: "test" (Dec 31 2020).
- Started Column:** Contains three cards: "Talk Content Management" (Sep 14 2020, VanDine, Lisa), "Talk Learning Management Admin" (Sep 21 2020, McLaren, Au...), and "Talk Meeting" (Sep 21 2020, McLaren, Au...). A new card is being added with the title "NEW CARD".
- Completed Column:** Contains one card: "Talk Communications" (Sep 14 2020, VanDine, Lisa).
- Toolbar:** Includes a "grid" view icon (highlighted with a red box), a "list" view icon, and a "kanban" view icon.
- Right Sidebar:** Includes buttons for "COLUMNS" and "LEGEND".

Task Timeline View

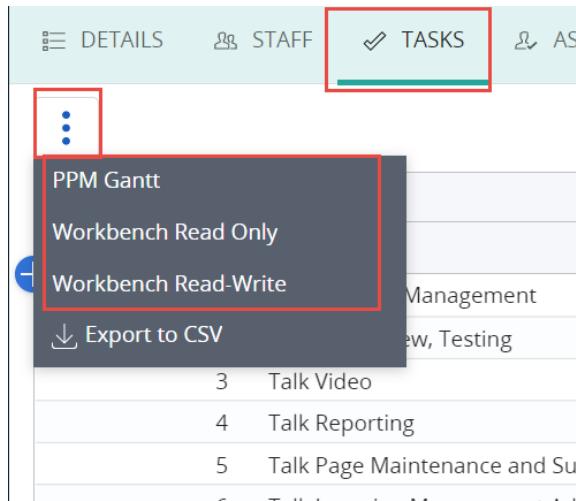
- Tasks can be viewed in a simple Grid and Timeline view
- Use the + icon to add Tasks



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

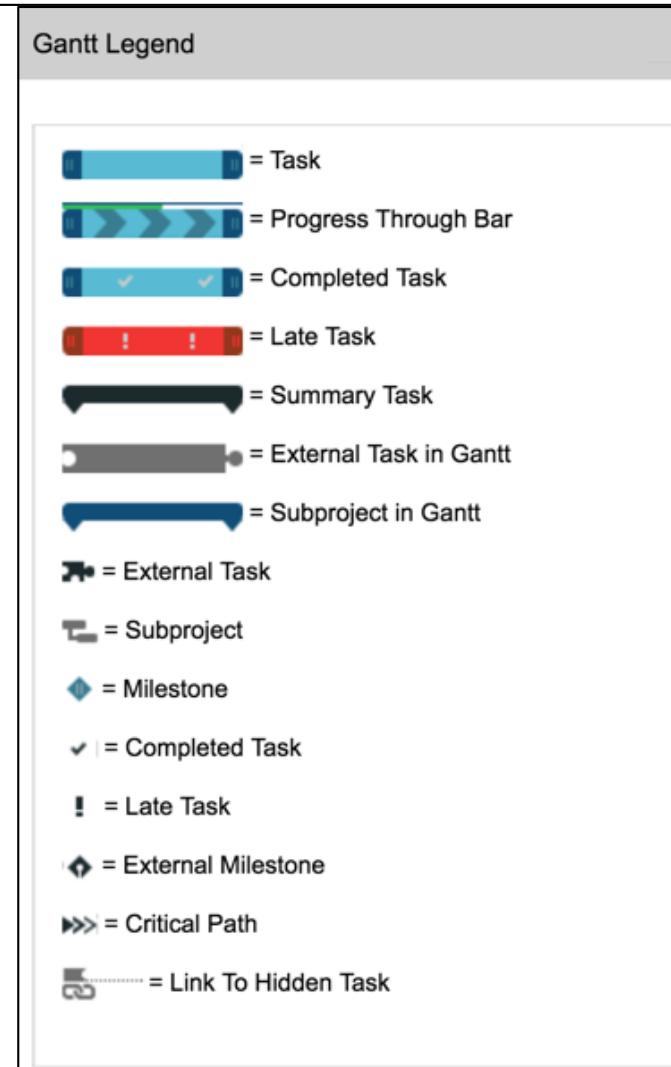
-  Save or discard changes
-  Create a new task
-  Indent, Outdent, and Move
-  Link or unlink tasks (create a dependency)
-  Expand or collapse task hierarchy
-  Delete Task



PPM Gantt
Workbench Read Only
Workbench Read-Write

Export to CSV

3	Talk Video
4	Talk Reporting
5	Talk Page Maintenance and Sup



Create a New Task – Gantt View

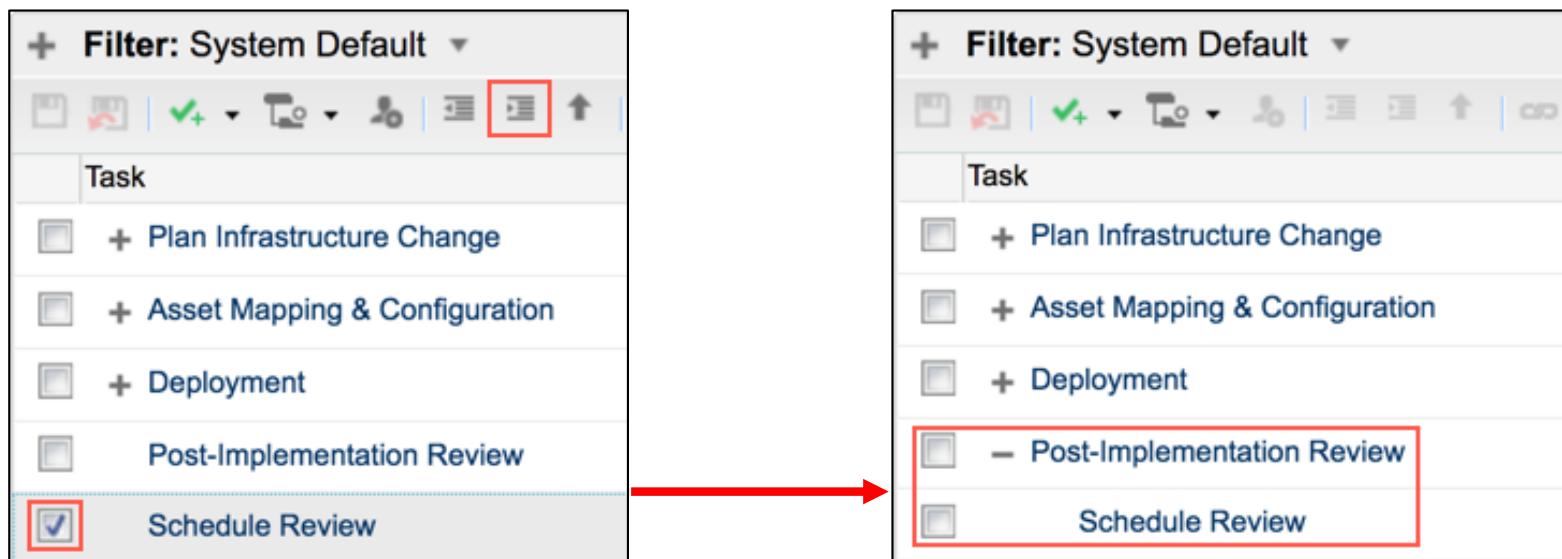
1. Check the box at the desired insertion point (this will place the new task below the selected location)
2. Click the Create Task Icon or press the Insert key
3. Populate the fields as desired (a red asterisk indicates a required field)
4. Check the Key Task, Milestone, and/or Fixed Duration boxes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

The screenshot shows the 'Business Template - Create Task' dialog box. The interface is divided into several sections: General, Schedule Dates, Schedule Constraints, and Guidelines. The General section contains fields for Name, ID, Status (set to 'Not Started'), % Complete (0.00%), % Expended, and various checkboxes for Key Task, Milestone, Open for Time Entry, Charge Code, Cost Type, and User Text 1. The Schedule Dates section shows Start and Finish dates both set to 11/20/2018. The Schedule Constraints section includes fields for Must Start On, Must Finish On, Late Start, Late Finish, Start No Earlier Than, Start No Later Than, Finish No Earlier Than, and Finish No Later Than. The Guidelines section has a text input field for Guidelines. At the bottom are four buttons: Save, Submit and Create New (highlighted with a red circle), Save And Return, and Return. Red circles numbered 1 through 5 point to specific elements: 1 points to the 'Select Team' checkbox in the list above the dialog; 2 points to the green plus sign icon in the toolbar; 3 points to the 'Name' field in the General section; 4 points to the 'Open for Time Entry' checkbox in the General section; and 5 points to the 'Submit and Create New' button at the bottom of the dialog.

Create a New Task – Gantt View (2)

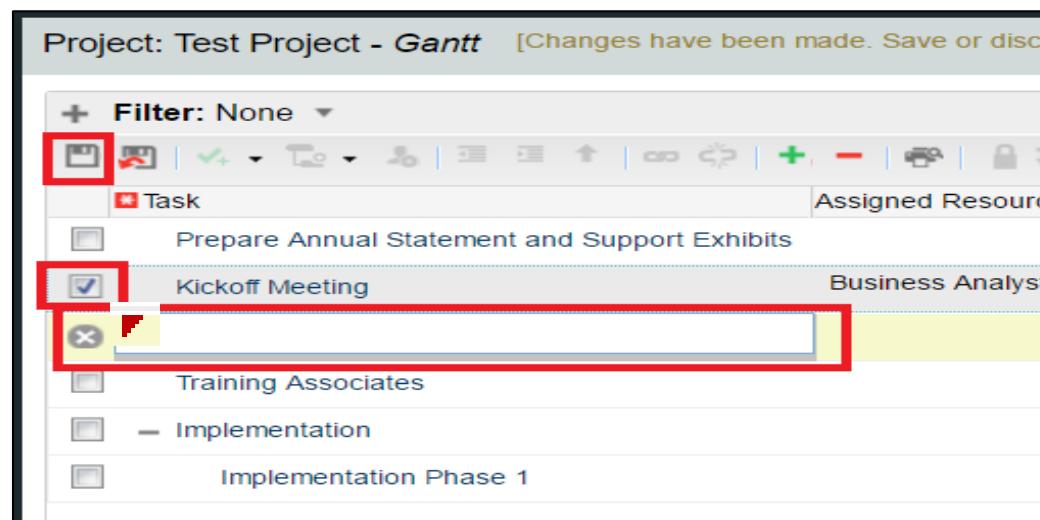
To establish a WBS hierarchy of indented tasks:

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

This screenshot shows the 'Tasks' tab in a project management application. The 'VIEW' dropdown is set to 'Default Task Grid View w/ Cost Type'. A red box highlights the 'TASKS' tab in the top navigation bar. A red box also highlights the 'Default Task Grid View w/ Cost Type' option in the 'VIEW' dropdown. A blue plus icon is visible in the top-left corner of the grid. A red box highlights the 'Test Task' row, which has been edited. The grid includes columns for *Name, *Start, *Finish, Cost Type, Key Task, Milestone, Status, and Open For Tim.

WBS Sort	*Name	*Start	*Finish	Cost Type	Key Task	Milestone	Status	Open For Tim
1	Test Task	Sep 23 2020	Sep 23 2020	Operating			Not Started	
2		Dec 10 2018	Sep 14 2020	Operating			Started	
3		Dec 12 2018	Sep 14 2020	Operating			Started	
4		Aug 21 2019	Aug 21 2019	Operating			Started	
5	Talk Page Maintenance and Support	Feb 04 2019	Sep 08 2020	Operating			Started	
		Jan 07 2019	Oct 30 2020	Operating			Started	

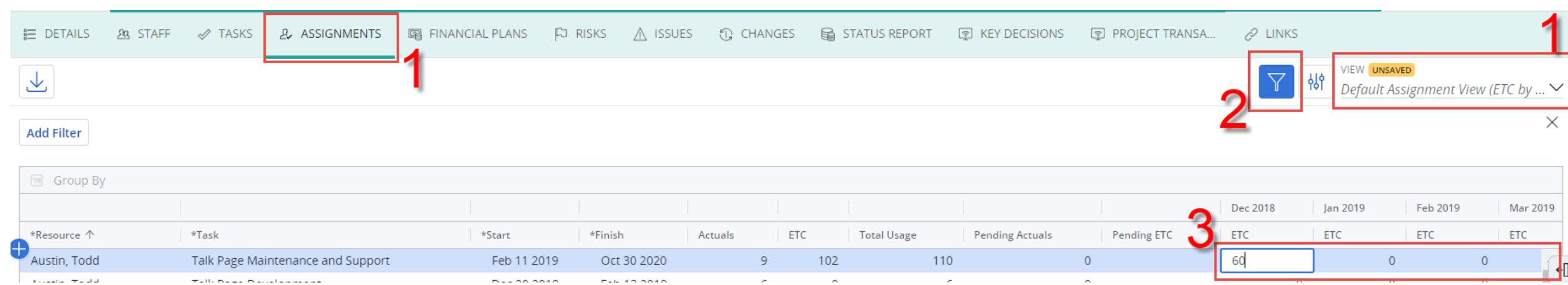
4. Once task is created, make sure the row is selected and press the Details pop out tab  on the right side
5. On the Assignments tab, you can add multiple people to one task

This screenshot shows the 'Tasks' tab with the 'Default Task Grid View w/ Cost Type' view. A red box highlights the 'Test Task' row. A red box highlights the 'ASSIGNMENTS' tab in the top navigation bar. A red box highlights the 'Search Resources, Roles, or Teams...' input field in the resource assignment pop-up. The pop-up lists several resources: Johann Abraham..., Barbara Adams (Identity...), Christopher Adams, Marianne Adams, Michael Adams, Staci Adams, clarity Administrator, Process Administrator, and XC Administrator.

WBS Sort	*Name	*Start	*Finish	Cost Type
13	Test Task	Sep 23 2020	Oct 09 2020	Operating
1	Talk Content Management	Dec 10 2018	Sep 14 2020	Operating
2	Talk QA, Review, Testing	Dec 12 2018	Sep 14 2020	Operating
3	Talk Video	Aug 21 2019	Aug 21 2019	Operating
4	Talk Reporting	Feb 04 2019	Sep 08 2020	Operating
5	Talk Page Maintenance and Support	Jan 07 2019	Oct 30 2020	Operating
6	Talk Learning Management Admin	Dec 13 2018	Sep 21 2020	Operating
7	Talk Page Development	Dec 20 2018	Apr 20 2020	Operating
8	Talk Meeting	Dec 11 2018	Sep 21 2020	Operating
9	Talk Communications	Dec 31 2018	Sep 14 2020	Operating
10	Talk Project Control	Jan 07 2019	Sep 14 2020	Operating
11	Talk Project Planning	Dec 10 2018	Sep 14 2020	Operating
12	test	Sep 15 2020	Dec 31 2020	Operating

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



1

2

3

Dec 2018	Jan 2019	Feb 2019	Mar 2019
ETC	ETC	ETC	ETC
60	0	0	0

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

Default Staff View										
Group By ▼										
Totals										
*Resource ↑	Role	Open For Time Entry	Start	Finish	Default Allocation	Actuals	ETC	Allocation	Allocations	Total
kerry2	Business Systems Analysts	✓			60%	0	0	2,515	2,515	0
Sarwatari, Kerry (558466)		✓			0%	0	260	0	0	0

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



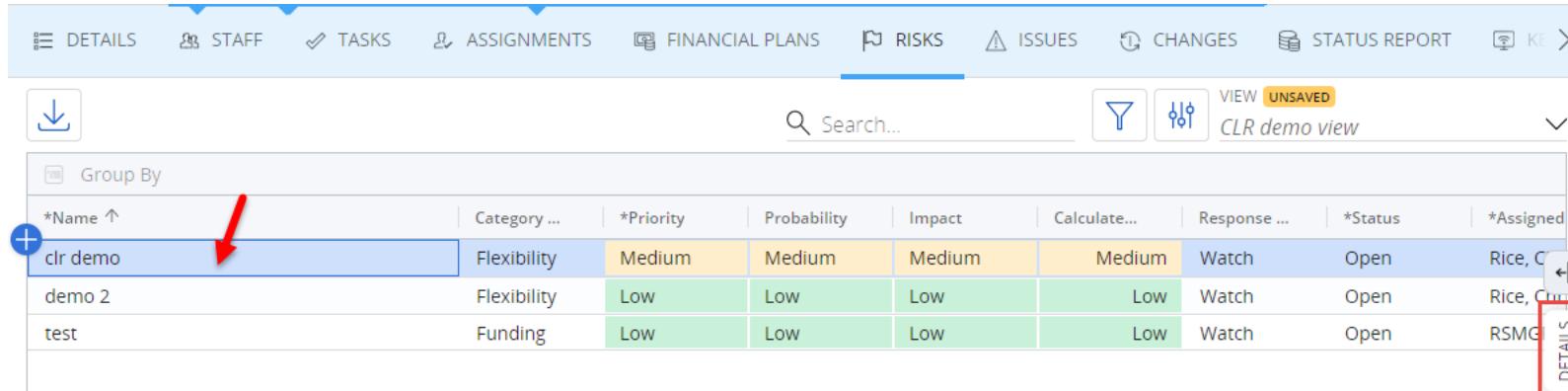
Risks, Issues, and Changes Tabs

- 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

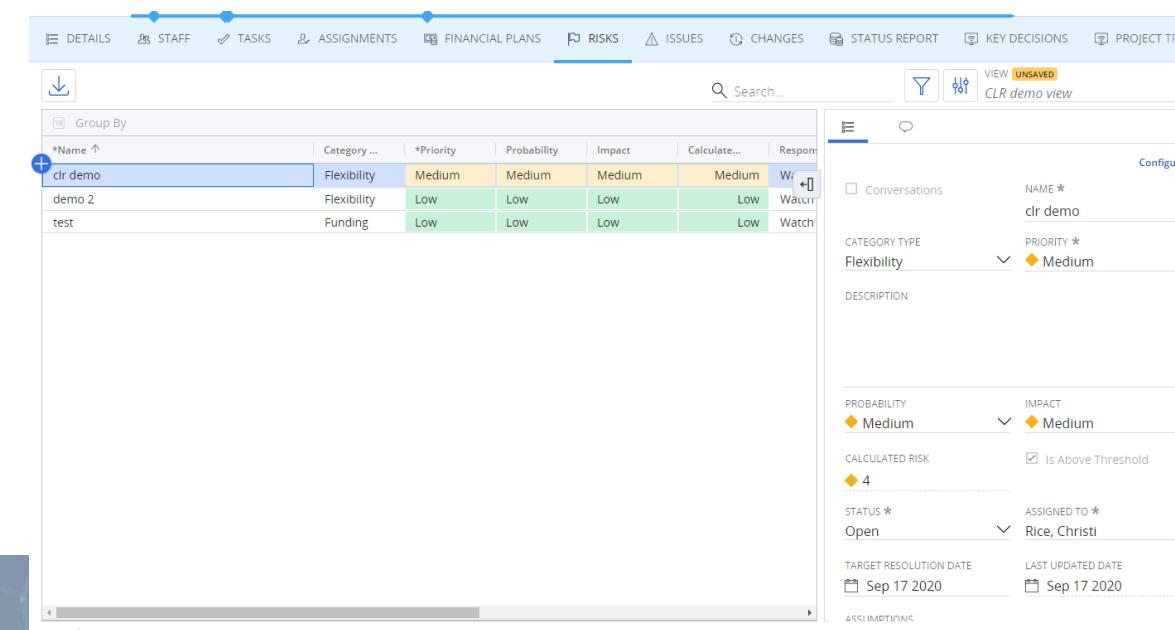
Risks, Issues, and Changes Tabs

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



The screenshot shows a software interface for managing risks, issues, and changes. The top navigation bar includes tabs for DETAILS, STAFF, TASKS, ASSIGNMENTS, FINANCIAL PLANS, RISKS, ISSUES, CHANGES, STATUS REPORT, and KEY DECISIONS. The RISKS tab is currently selected. Below the navigation bar is a search bar with the placeholder 'Search...' and a 'VIEW UNSAVED' button. The main area displays a table with columns: *Name, Category, *Priority, Probability, Impact, Calculate..., Response, *Status, and *Assigned. The table contains three rows: 'clr demo' (selected and highlighted with a blue background), 'demo 2', and 'test'. A red arrow points to the 'clr demo' row. A red box highlights the 'DETAILS' tab on the right edge of the ribbon.

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



The screenshot shows the same software interface as the previous one, but with a modal window titled 'Configure' open on the right side. The modal displays detailed information for the selected row ('clr demo'). The 'NAME' field is set to 'clr demo'. The 'CATEGORY TYPE' is 'Flexibility' and the 'PRIORITY' is 'Medium'. The 'DESCRIPTION' field is empty. Below these, there are dropdowns for 'PROBABILITY' (Medium) and 'IMPACT' (Medium). The 'CALCULATED RISK' is '4' and the 'Is Above Threshold' checkbox is checked. The 'STATUS' is 'Open' and the 'ASSIGNED TO' field contains 'Rice, Christi'. The 'TARGET RESOLUTION DATE' is 'Sep 17 2020' and the 'LAST UPDATED DATE' is 'Sep 17 2020'. The 'ASSUMPTIONS' section is empty. A red box highlights the 'DETAILS' tab on the right edge of the ribbon.

Exercise

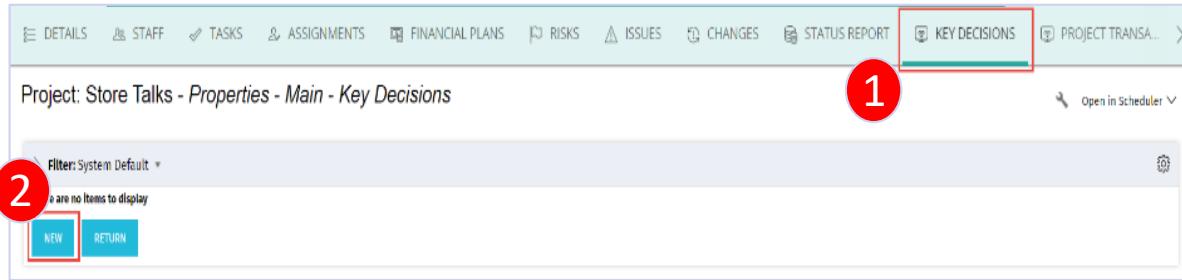


- Navigate to the Risks/Issues/Change Requests tabs of a project
- Create a New Risk
- Create a New Issue
- Create a New Change Request

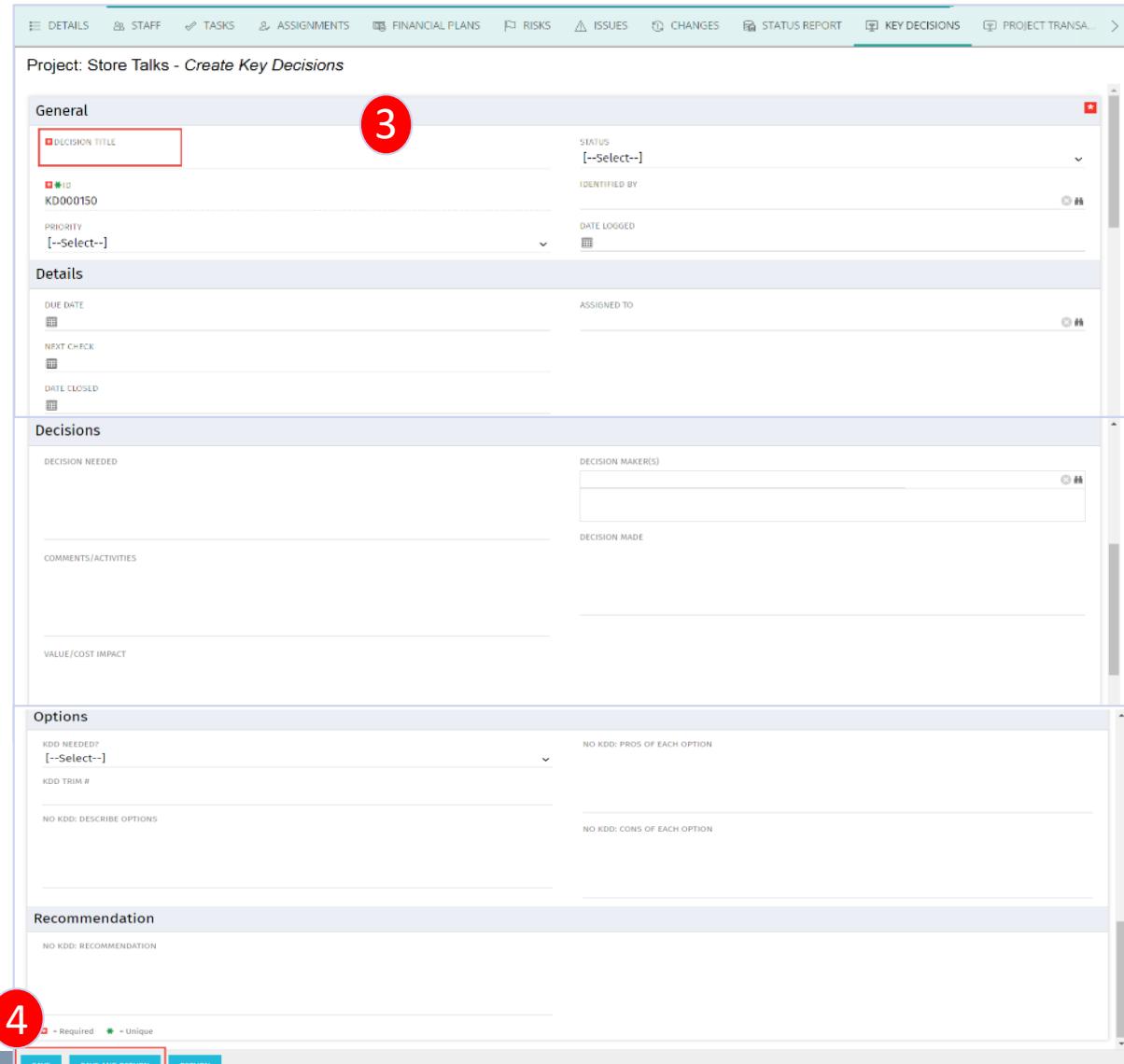
Time: 10 minutes

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



Project: Store Talks - Create Key Decisions

General

DECISION TITLE

ID
KD000150

PRIORITY
[-Select-]

STATUS
[-Select-]

IDENTIFIED BY

DATE LOGGED

Details

DUE DATE

ASSIGNED TO

NEXT CHECK

DATE CLOSED

Decisions

DECISION NEEDED

DECISION MAKER(S)

COMMENTS/ACTIVITIES

DECISION MADE

Options

KDD NEEDED
[-Select-]

KDD TRIM #

NO KDD: DESCRIBE OPTIONS

NO KDD: PROS OF EACH OPTION

NO KDD: CONS OF EACH OPTION

Recommendation

NO KDD: RECOMMENDATION

4 * = Required * = Unique

SAVE SAVE AND RETURN RETURN

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

The screenshots illustrate the process of editing a key decision. In the first screenshot, the 'KEY DECISIONS' tab is selected (1). A specific key decision, 'Test KD', is selected in the list (2). In the second screenshot, the details of 'Test KD' are displayed (3). The scroll bar on the right side (5) allows access to other fields. The bottom of the screen shows the standard save options: 'SAVE', 'SAVE AND RETURN', and 'RETURN' (6).



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



Term	Definition
Cost Plan	<p>The proposed cost for project-level efforts (Working Plan).</p> <ul style="list-style-type: none">• Aggregated Reporting of Financial Cost Attributes• Time Scaled Estimates• Available to Project Manager
Budget Plan	<p>A Cost Plan which has been submitted for approval to become a financial baseline (Approved Plan).</p> <ul style="list-style-type: none">• Financial Baseline
Plan of Record (POR)	<p>The cost plan that will feed into reports</p>

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?

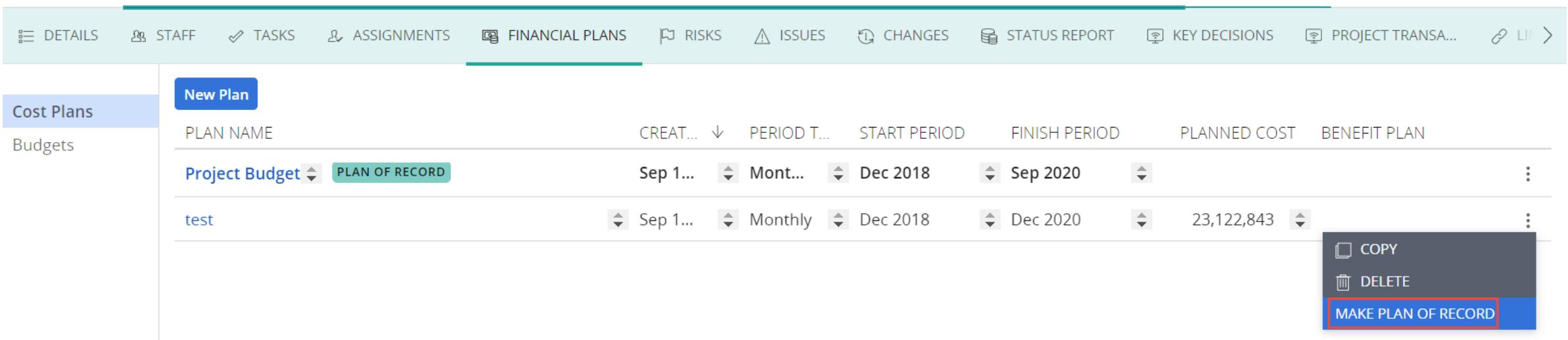
- In general, the first cost plan should be created AFTER these items have been completed:
 - Investment is fully staffed and allocations are set
 - Investment is financially-enabled

		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



The screenshot shows a software interface for managing financial plans. The top navigation bar includes links for DETAILS, STAFF, TASKS, ASSIGNMENTS, FINANCIAL PLANS (which is the active tab), RISKS, ISSUES, CHANGES, STATUS REPORT, KEY DECISIONS, PROJECT TRANSACTIONS, and a user profile. On the left, a sidebar shows 'Cost Plans' and 'Budgets'. The main table lists financial plans with columns for PLAN NAME, CREATE DATE, PERIOD TYPE, START PERIOD, FINISH PERIOD, PLANNED COST, and BENEFIT PLAN. Two rows are visible: 'Project Budget' (selected, indicated by a blue border around the PLAN NAME cell) and 'test'. A context menu is open over the 'test' row, with options COPY, DELETE, and MAKE PLAN OF RECORD, the latter of which is highlighted with a red border. The table also includes dropdown menus for PERIOD TYPE and FINISH PERIOD.

PLAN NAME	CREATE DATE	PERIOD TYPE	START PERIOD	FINISH PERIOD	PLANNED COST	BENEFIT PLAN
Project Budget	Sep 1...	Mont...	Dec 2018	Sep 2020		
test	Sep 1...	Monthly	Dec 2018	Dec 2020	23,122,843	

COPY
 DELETE
MAKE PLAN OF RECORD

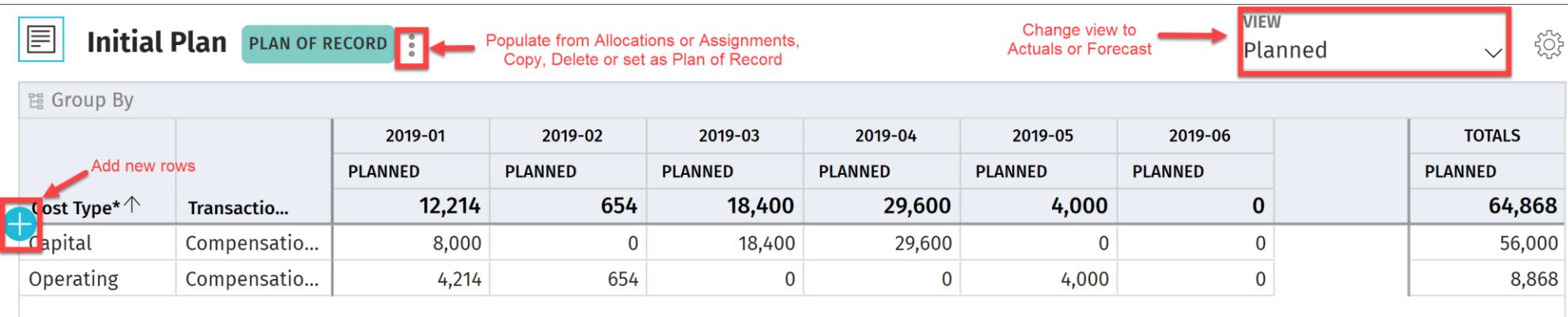
Financials Tab

- 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

The screenshot shows the Clarity Support software interface. At the top, there is a navigation bar with tabs: CONVERSATIONS, TASKS, LINKS, STATUS, FINANCIALS, RISKS, ISSUES, and CHARTS. The FINANCIALS tab is highlighted with a red box. Below the navigation bar, there is a 'NEW PLAN' button in a blue box, also highlighted with a red box. On the right side, a 'CREATE' dialog box is open. Inside the dialog box, the 'PLAN NAME *' field is filled with 'Feature rollout' and is also highlighted with a red box. The 'GROUPING ATTRIBUTES *' section on the right contains several checkboxes, with 'Cost Type' and 'Transaction Class' checked, both highlighted with red boxes. The 'CREATE' button at the bottom right of the dialog box is also highlighted with a red box.

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



Initial Plan PLAN OF RECORD

Populate from Allocations or Assignments, Copy, Delete or set as Plan of Record

Change view to Actuals or Forecast

VIEW
Planned

Add new rows

Cost Type* ↑

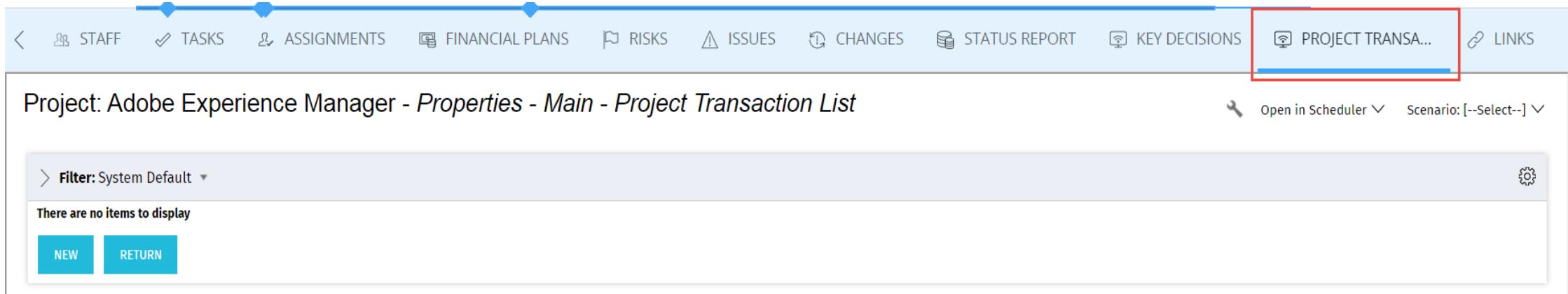
Group By		2019-01	2019-02	2019-03	2019-04	2019-05	2019-06	TOTALS
Cost Type*	Transaction Type	PLANNED						
		Capital	12,214	654	18,400	29,600	4,000	0
Operating	Compensatio...	8,000	0	18,400	29,600	0	56,000	
		4,214	654	0	0	4,000	8,868	

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



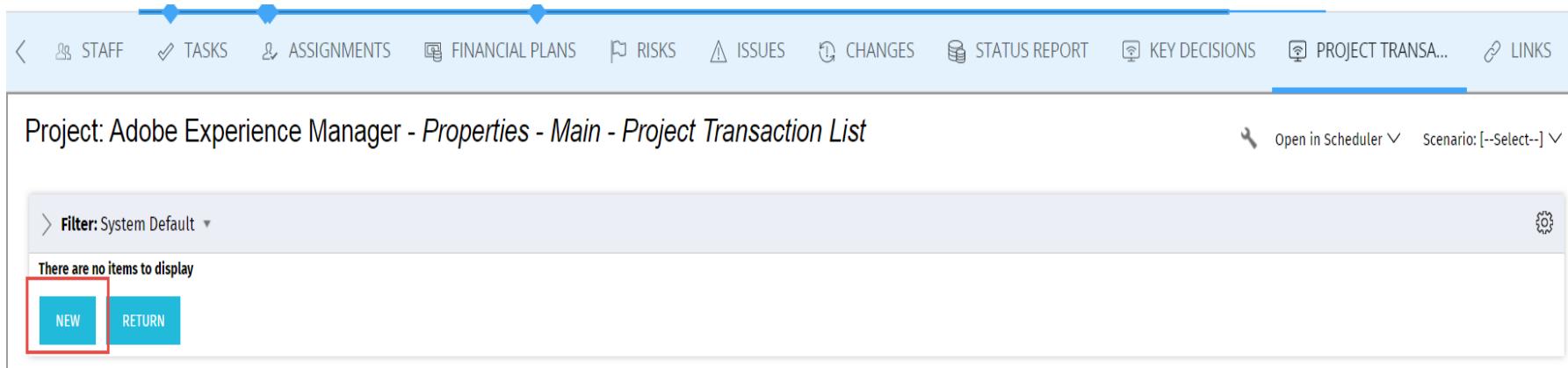
Project: Adobe Experience Manager - Properties - Main - Project Transaction List

Filter: System Default

There are no items to display

NEW RETURN

2. Click New



Project: Adobe Experience Manager - Properties - Main - Project Transaction List

Filter: System Default

There are no items to display

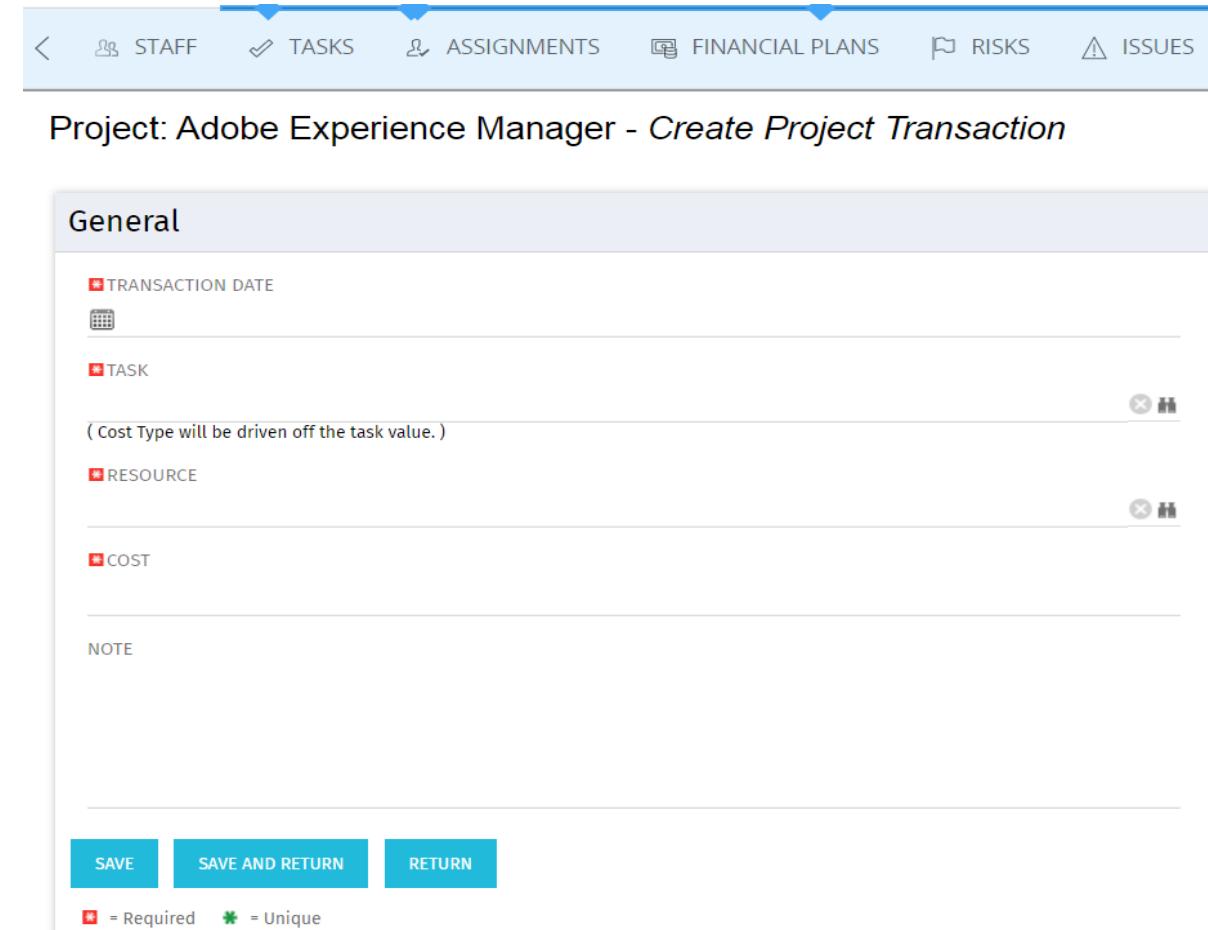
NEW RETURN

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



Project: Adobe Experience Manager - *Create Project Transaction*

General

*TRANSACTION DATE

*TASK

(Cost Type will be driven off the task value.)

*RESOURCE

*COST

NOTE

SAVE **SAVE AND RETURN** **RETURN**

* = Required * = Unique

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?



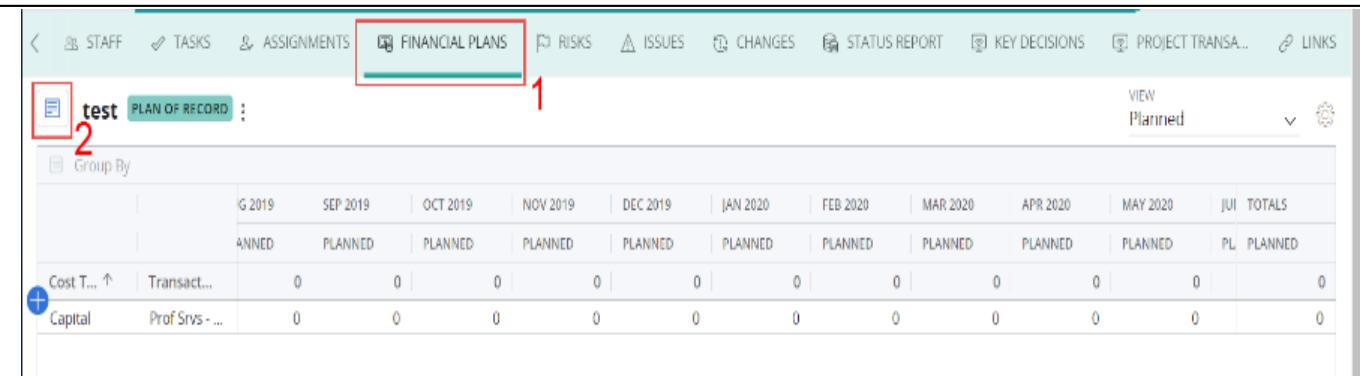
- Cost Plans are submitted for approval and once approved becomes the budget plan - The “baseline” for financials
- Budget Plans are mirror copies of the submitted cost plan view
- Approved budget plans are READ-ONLY ‘snapshots’ of the submitted cost plan
- Multiple budget plans can exist
- This functionality 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

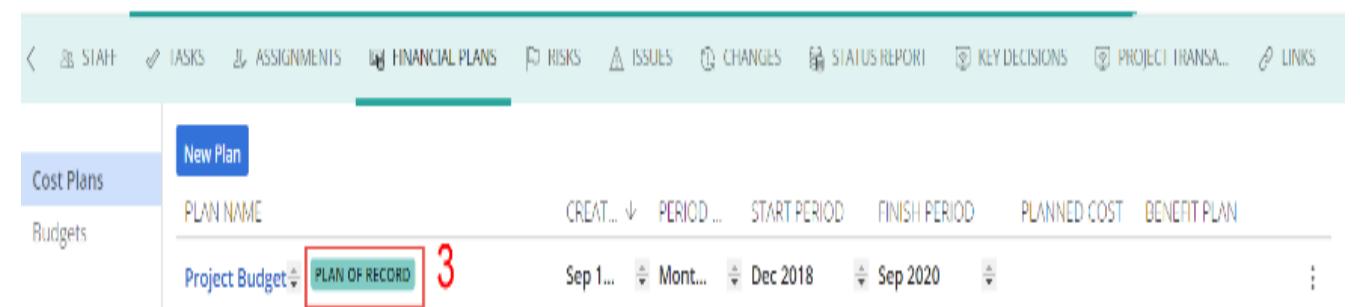
Create a Budget Plan

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



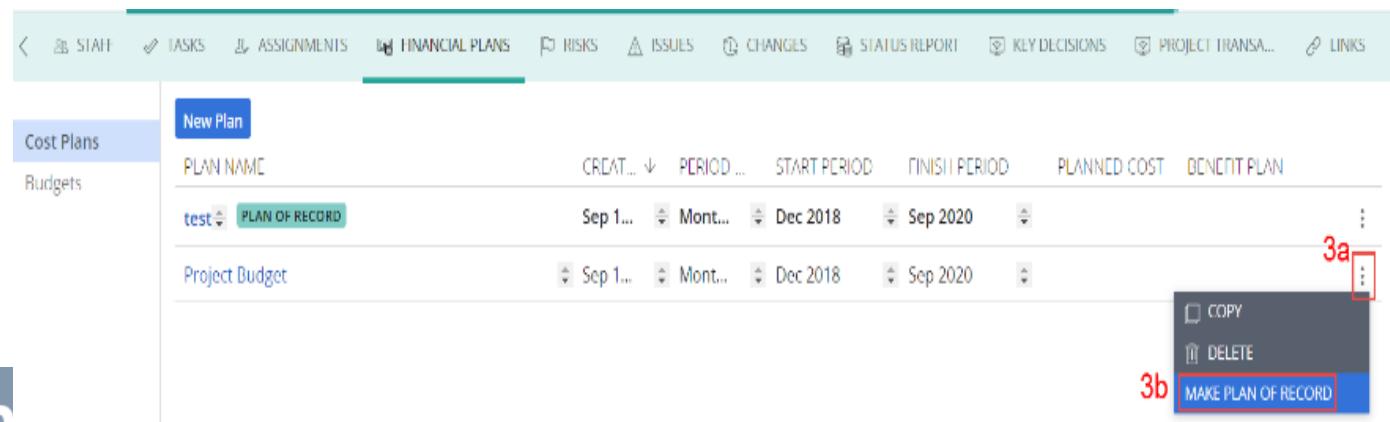
1

	G 2019	SEP 2019	OCT 2019	NOV 2019	DEC 2019	JAN 2020	FEB 2020	MAR 2020	APR 2020	MAY 2020	JUN 2020	TOTALS
	ANNED	PLANNED	0									
Cost T... ↑	Transact...	0	0	0	0	0	0	0	0	0	0	0
Capital	Prof Svcs - ...	0	0	0	0	0	0	0	0	0	0	0



3

PLAN NAME	CREATE...	PERIOD...	START PERIOD	FINISH PERIOD	PLANNED COST	BENEFIT PLAN
Project Budget	Sep 1...	Mont...	Dec 2018	Sep 2020		



3a

3b

PLAN NAME	CREATE...	PERIOD...	START PERIOD	FINISH PERIOD	PLANNED COST	BENEFIT PLAN
test	Sep 1...	Mont...	Dec 2018	Sep 2020		
Project Budget	Sep 1...	Mont...	Dec 2018	Sep 2020		

COPY
DELETE
MAKE PLAN OF RECORD

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

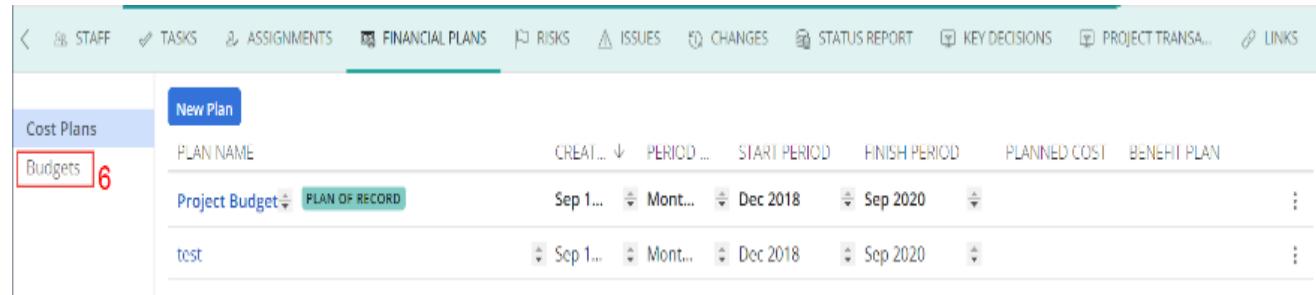
5. Confirm the details for your budget and press Submit

a. You will see the Success status message at the top of your window

 Success: Cost plan submitted for approval

Create a Budget Plan (3)

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



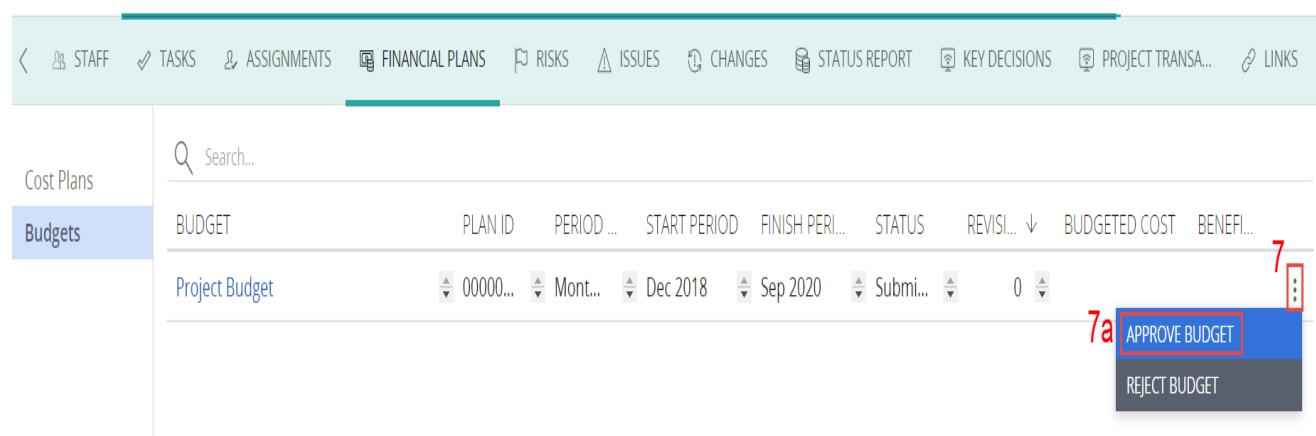
PLAN NAME	CREATE...	PERIOD...	START PERIOD	FINISH PERIOD	PLANNED COST	BENEFIT PLAN
Project Budget PLAN OF RECORD	Sep 1...	Mont...	Dec 2018	Sep 2020		
test	Sep 1...	Mont...	Dec 2018	Sep 2020		

7. Press the 3 dots on the right hand side of the appropriate budget row

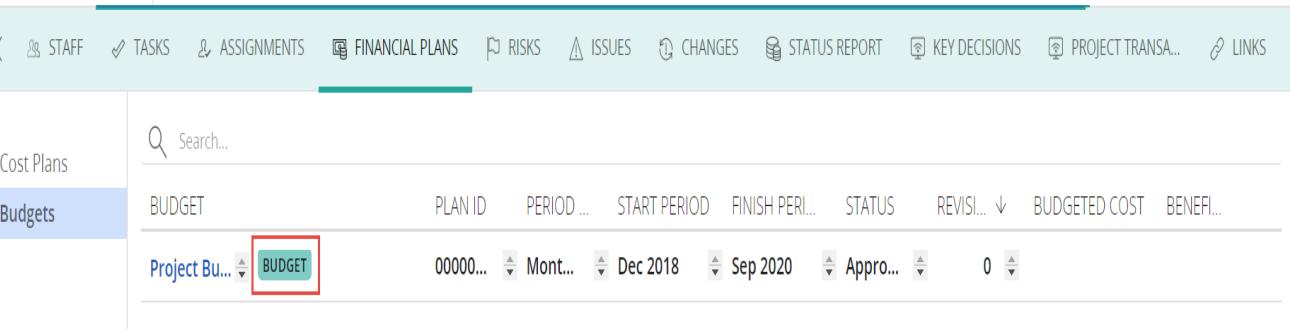
- Select Approve Budget
- You will see the Success status message at the top of your window

 Success: Budget is approved.

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



BUDGET	PLAN ID	PERIOD...	START PERIOD	FINISH PERI...	STATUS	REVISI...	BUDGETED COST	BENEFI...
Project Budget	00000...	Mont...	Dec 2018	Sep 2020	Submitted	0		



BUDGET	PLAN ID	PERIOD...	START PERIOD	FINISH PERI...	STATUS	REVISI...	BUDGETED COST	BENEFI...
Project Bu... BUDGET	00000...	Mont...	Dec 2018	Sep 2020	Approved	0		

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

clarity

Menu Links

GENERAL

- PM and BM Dashboard
- Resource List
- My Calendar

PROJECT MANAGEMENT

- Posted Transaction Review Portlet
- Finance Views
- Project Management Training Deck
- Time Views

- Reports and Jobs
- Project Views

PP Hi, 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. Change Resource ETCs to be 0.

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

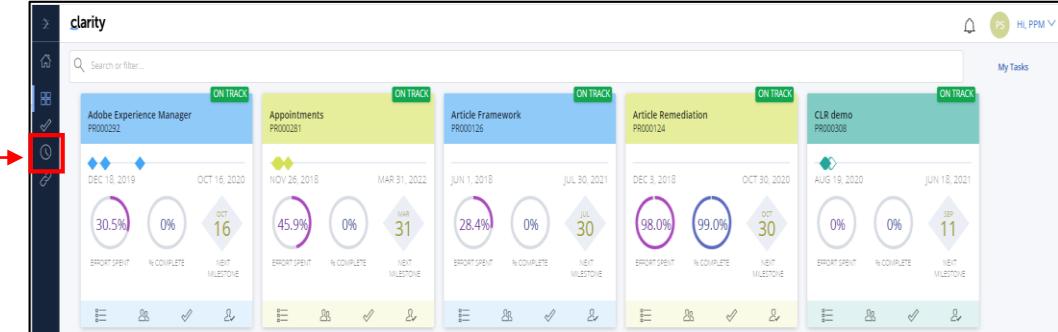




Appendix: Timesheets

How to Submit Timesheets

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

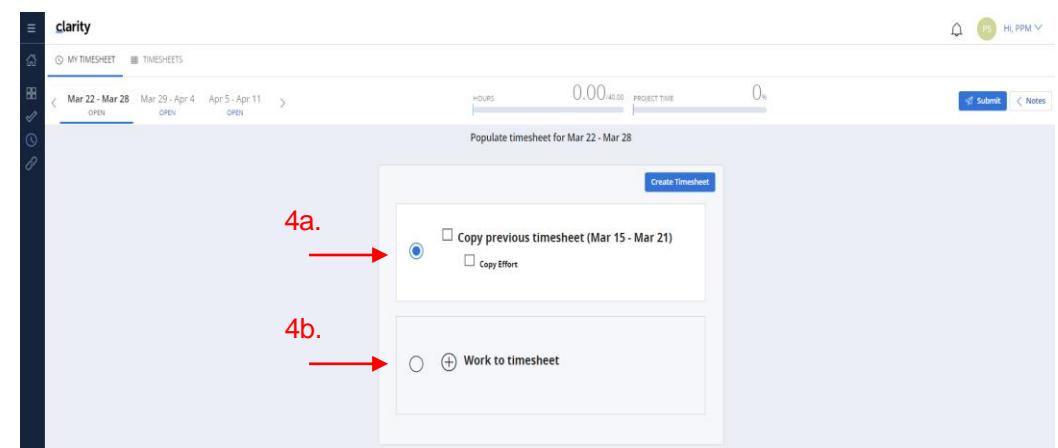


2. The Current Timesheet page will open.



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.

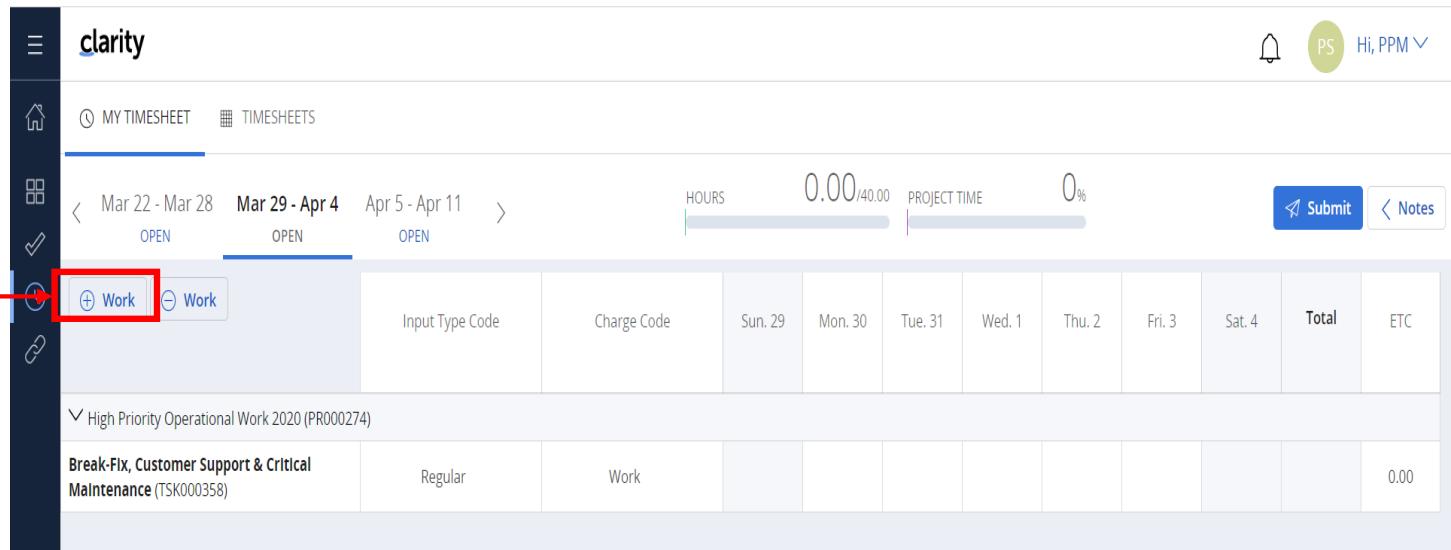
NOTE: If there are tasks missing from this list, reach out the PM to add you to the project/tasks.

WORK			
<input type="button" value="Add"/> <input type="button" value="Add And Close"/> <input type="button" value="Cancel"/>			
<input type="text" value="Manager"/> Manager <input type="button" value="TYPE: All"/> <input type="button" value="SHOWING: Assigned Tasks"/> <input type="button" value="Start Date"/>			
<input type="text" value="Work Name / ID"/> Work Name / ID <input type="text" value="Task Name / ID"/> Task Name / ID <input type="text" value="Phase"/> Phase <input type="button" value="Finish Date"/>			
TASK STATUS: All	OPEN FOR TIME ENTRY: Yes	Phase	Start - Finish Date
Work Name / ID	Task Name / ID	Phase	Start - Finish Date
<input type="checkbox"/> High Priority Operational Work 2020 / PR000274	Break-Fix, Customer Support ... Maintenance / TSK000358		Jan 05 2020 - Dec 31 2020

Add more Tasks Individually

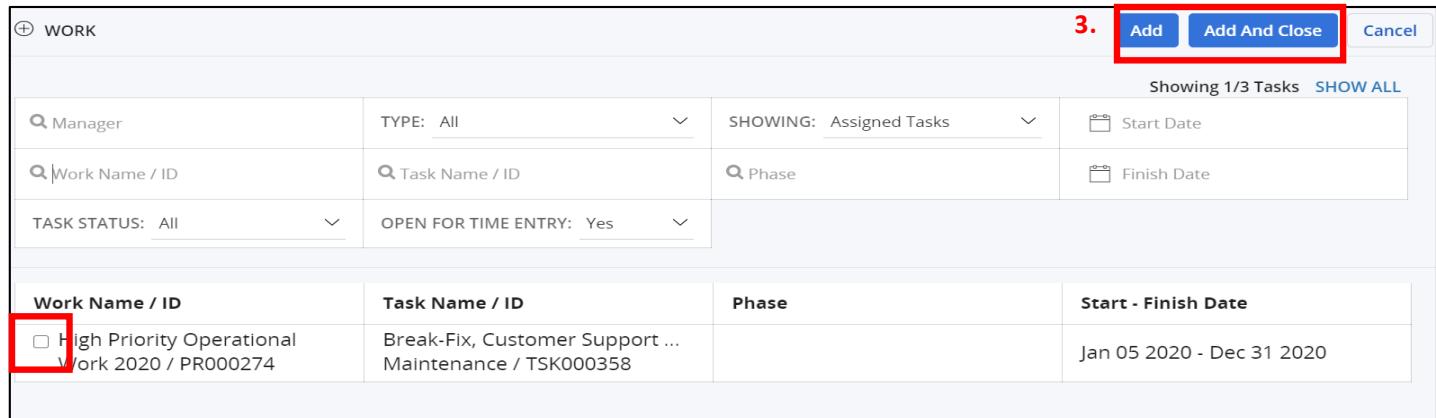
To add more tasks to the Timesheet, click **+ Work** to open the task/filter page (see slide 75: 4b. "Work in timesheet")

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



The screenshot shows the clarity Timesheets interface. At the top, there are navigation links for 'MY TIMESHEET' and 'TIMESHEETS'. Below that is a date range selector showing 'Mar 22 - Mar 28', 'Mar 29 - Apr 4', and 'Apr 5 - Apr 11', all marked as 'OPEN'. To the right are 'HOURS' (0.00/40.00), 'PROJECT TIME' (0%), and a 'Submit' button. The main area displays a list of tasks. The first task is 'High Priority Operational Work 2020 (PR000274)' with a sub-task 'Break-Fix, Customer Support & Critical Maintenance (TSK000358)'. The second task is 'Regular' and the third is 'Work'. A red box highlights the '+ Work' button in the top left corner of the task list.

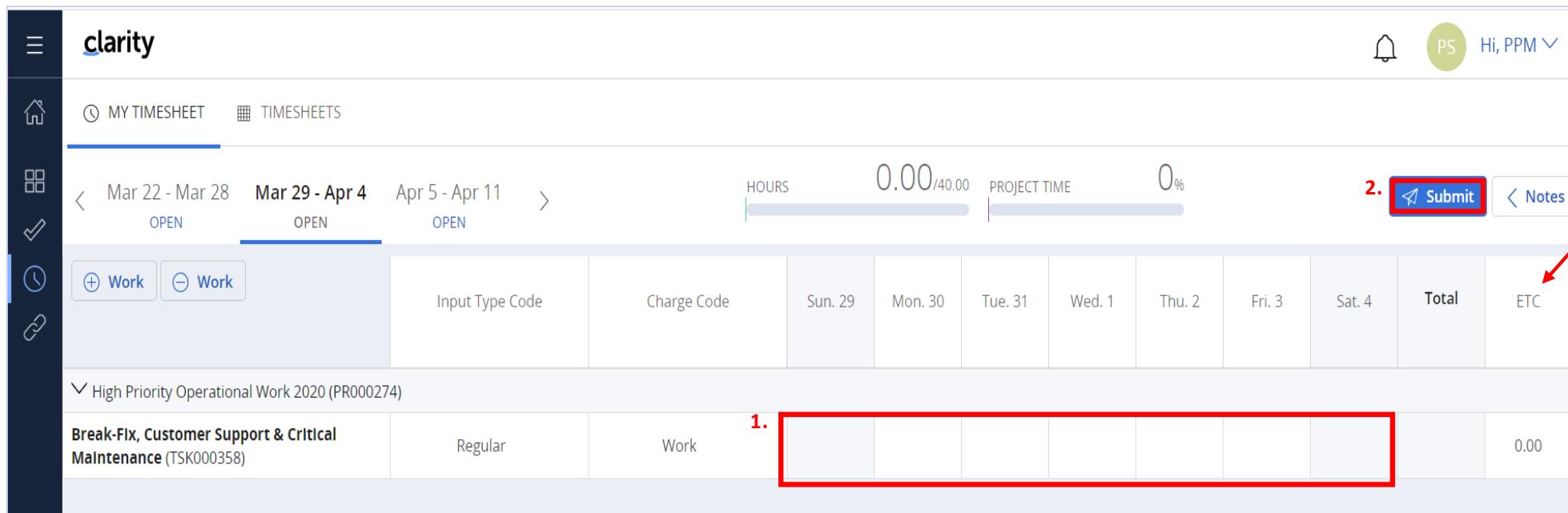
2. Click Add, or Add and Close if you have multiple pages.
3. The task is added to the Timesheet.



The screenshot shows the 'WORK' filter dialog. At the top, there are search fields for 'Manager', 'Work Name / ID', 'Task Name / ID', 'Phase', 'Start Date', and 'Finish Date'. Below are dropdowns for 'TASK STATUS' (All) and 'OPEN FOR TIME ENTRY' (Yes). The main area shows a table with columns: 'Work Name / ID', 'Task Name / ID', 'Phase', and 'Start - Finish Date'. The first row shows 'High Priority Operational Work 2020 / PR000274', 'Break-Fix, Customer Support ... Maintenance / TSK000358', 'Phase', and 'Jan 05 2020 - Dec 31 2020'. A red box highlights the checkbox in the 'Work Name / ID' column. At the bottom right, there are buttons for 'Add' and 'Add And Close', with a red box highlighting the 'Add And Close' button.

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.

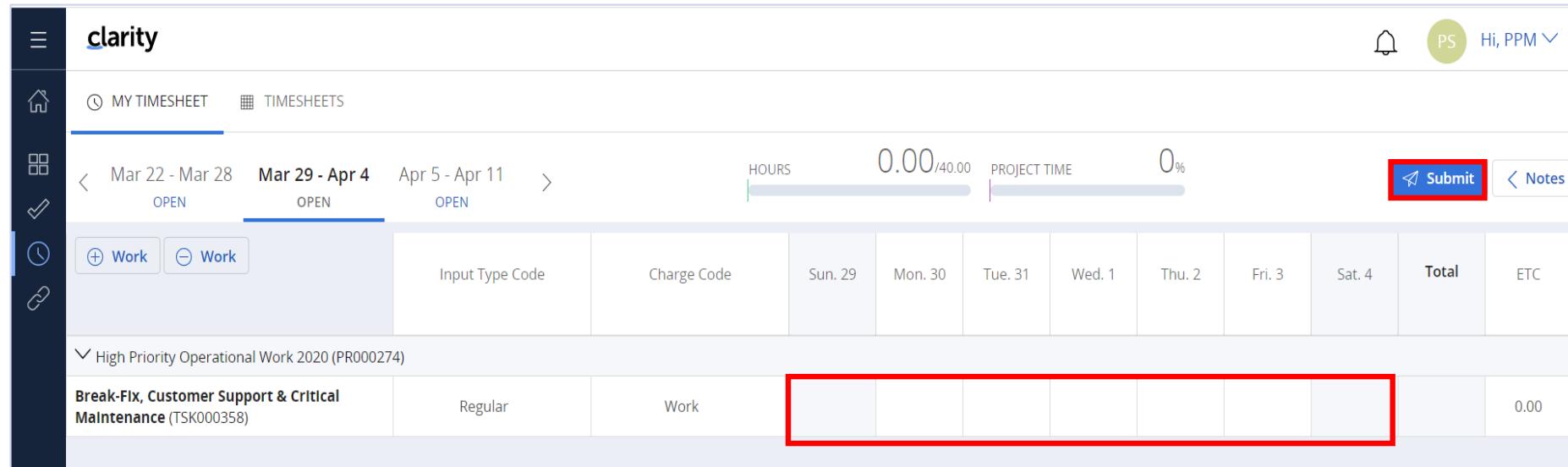


The screenshot shows the clarity software interface. The top navigation bar includes a bell icon, a user profile (PS Hi, PPM), and a sidebar with various icons. The main area displays a timesheet for the week of Mar 29 - Apr 4. The timesheet table has columns for Input Type Code, Charge Code, and dates from Sun. 29 to Sat. 4. A red box highlights the first column of the table, and a red arrow points to the 'Submit' button. The 'Submit' button is located in the top right corner of the timesheet area.

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.

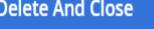


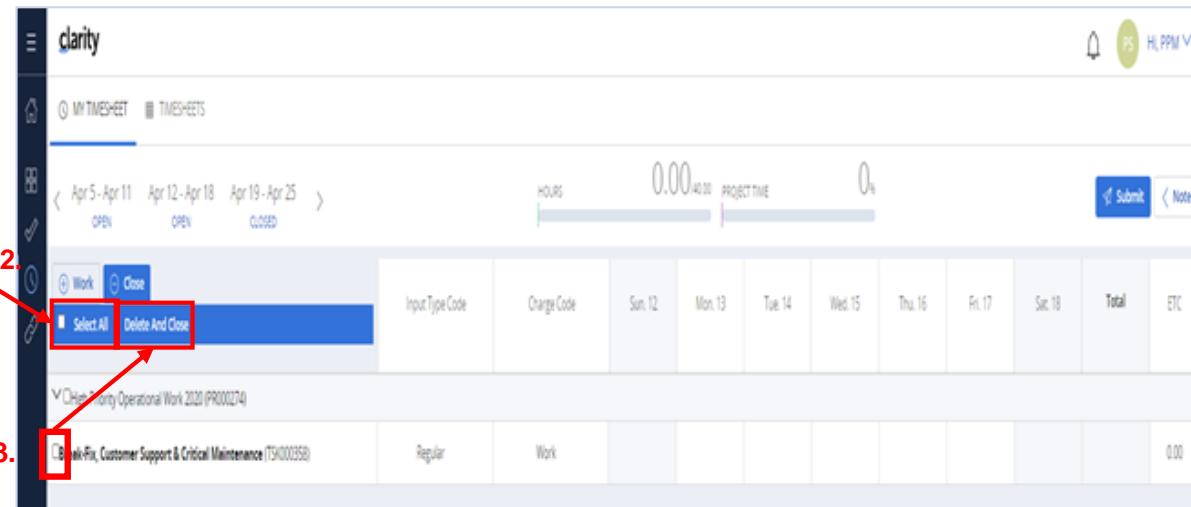
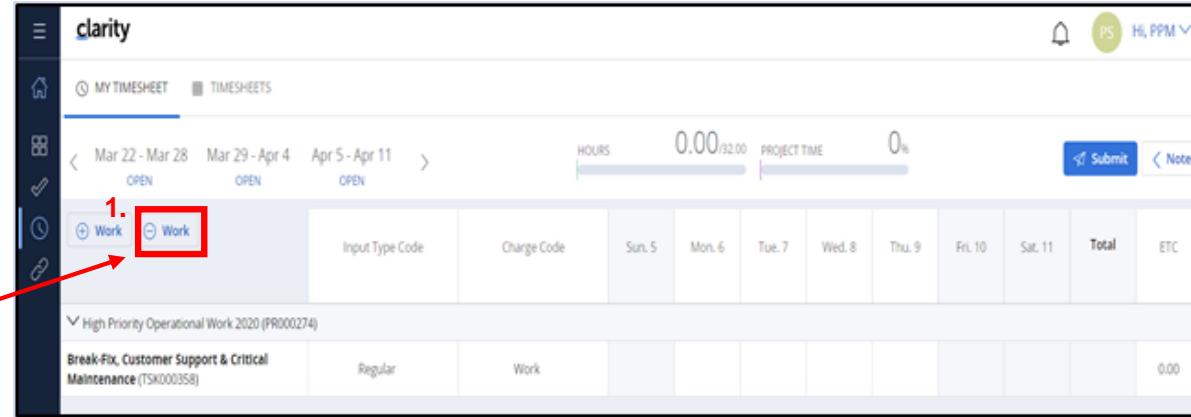
The screenshot shows a web-based timesheet application interface. At the top, there is a header with the brand name 'clarity' and navigation links for 'MY TIMESHEET' (which is highlighted with a blue underline) and 'TIMESHEETS'. Below the header, there are three date ranges: 'Mar 22 - Mar 28' (OPEN), 'Mar 29 - Apr 4' (OPEN, currently selected), and 'Apr 5 - Apr 11' (OPEN). The 'Mar 29 - Apr 4' range is highlighted with a blue bar. The interface includes a 'HOURS' input field showing '0.00 / 40.00' and a 'PROJECT TIME' progress bar at 0%. On the right, there is a red-bordered 'Submit' button and a 'Notes' link. The main content area shows a table with columns for 'Input Type Code', 'Charge Code', and dates from 'Sun. 29' to 'Sat. 4'. The 'ETC' column shows a value of '0.00'. A red box highlights the entire row for the task 'Break-Fix, Customer Support & Critical Maintenance (TSK000358)'. On the far left, there is a vertical sidebar with icons for Home, Grid, List, Clock, and Link.

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.

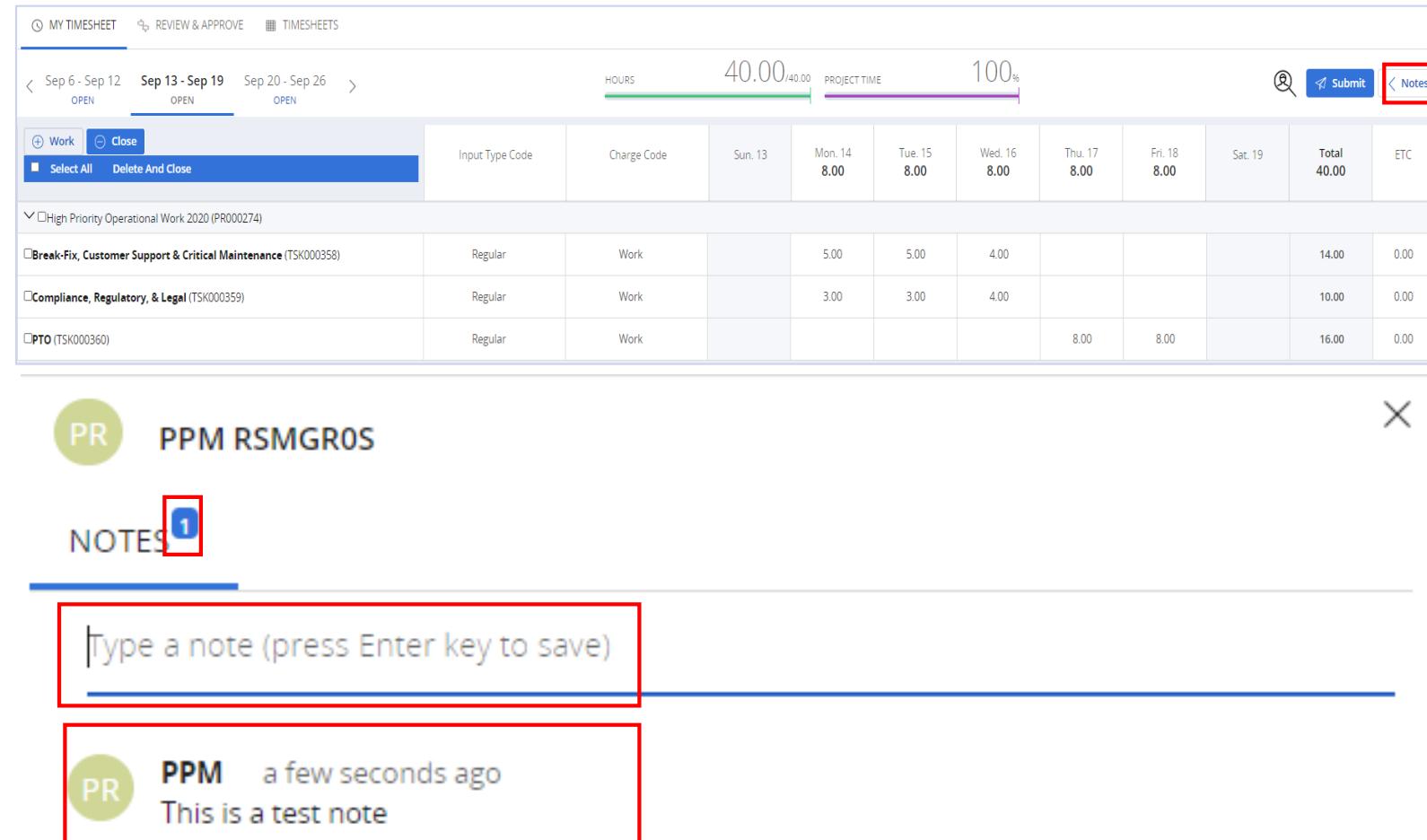
- To delete a task from the timesheet:

- Click on the “Delete work” icon. 
- Click on the Select All icon  to delete all tasks on the timesheet and close the “Delete work” box.
- Or you can click delete an individual task by clicking on the checkbox next to each task that you want to delete, then click  which will delete the selected tasks from the time sheet and close the “Delete work” box.



Using Timesheet Notes

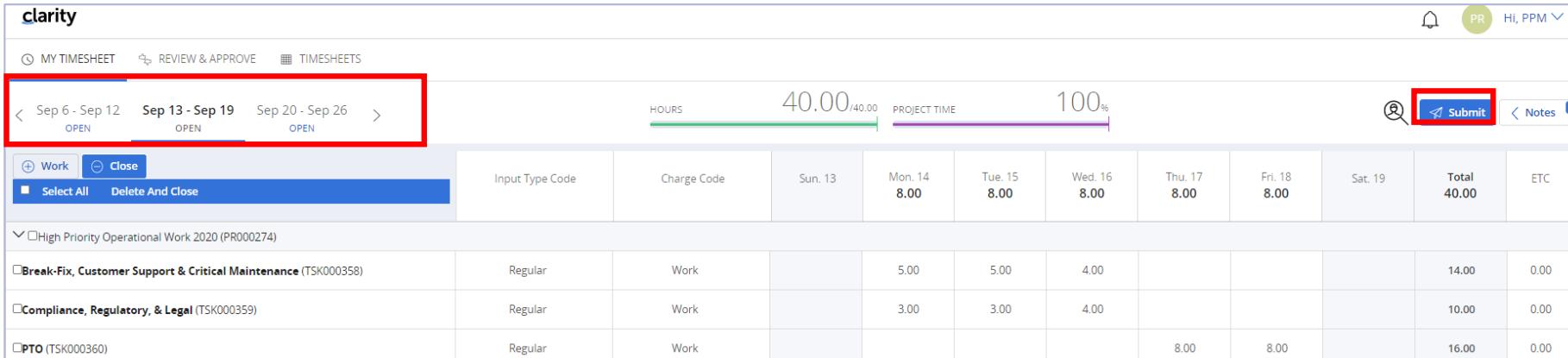
- *Timesheet Notes* are generated by clicking on the Notes icon in the top right corner of the timesheet.
- Enter the **text of the note** in the **Note** field.
- Clarity PPM will show the number of notes for the timesheet and show all notes below the freeform text box.
- Click  to close the notes box



The screenshot shows the Clarity PPM 'MY TIMESHEET' interface. At the top, there are three date ranges: 'Sep 6 - Sep 12 OPEN', 'Sep 13 - Sep 19 OPEN', and 'Sep 20 - Sep 26 OPEN'. Below this is a summary bar showing '40.00 /40.00' hours and '100%' project time. On the right, there are 'Submit' and 'Notes' buttons, with 'Notes' being highlighted with a red box. The main table lists work entries: 'High Priority Operational Work 2020 (PR000274)', 'Break-Fix, Customer Support & Critical Maintenance (TSK000358)', 'Compliance, Regulatory, & Legal (TSK000359)', and 'PTO (TSK000360)'. The 'High Priority Operational Work 2020' row has a blue selection bar with 'Select All' and 'Delete And Close' options. Below the table, a 'NOTES' section is shown. It has a green 'PR' icon, the text 'PPM RSMGR05', and a red box around the 'NOTES' label with a '1' in a red box. A red box also surrounds the text input field which says 'Type a note (press Enter key to save)'. Below this, another red box surrounds a note entry: a green 'PR' icon, the text 'PPM a few seconds ago', and the note 'This is a test note'.

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



The screenshot shows a software interface for managing timesheets. At the top, there are navigation links: 'MY TIMESHEET', 'REVIEW & APPROVE', and 'TIMESHEETS'. The title 'clarity' is displayed. The main area shows a weekly timesheet for the period from Sep 6 to Sep 12, with the period 'Sep 13 - Sep 19' selected and highlighted with a red box. The timesheet grid includes columns for 'Input Type', 'Code', 'Hours', and days of the week (Sun. 13, Mon. 14, Tue. 15, Wed. 16, Thu. 17, Fri. 18, Sat. 19). The total hours for the week are 40.00. The 'Submit' button is highlighted with a red box. At the bottom, there are sections for 'High Priority Operational Work 2020' and 'Break-Fix, Customer Support & Critical Maintenance'.

Input Type	Code	Sun. 13	Mon. 14	Tue. 15	Wed. 16	Thu. 17	Fri. 18	Sat. 19	Total	ETC
Work		8.00	8.00	8.00	8.00	8.00	8.00		40.00	
Break-Fix, Customer Support & Critical Maintenance (TSK000358)	Regular	Work	5.00	5.00	4.00				14.00	0.00
Compliance, Regulatory, & Legal (TSK000359)	Regular	Work	3.00	3.00	4.00				10.00	0.00
PTO (TSK000360)	Regular	Work				8.00	8.00		16.00	0.00

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.

1. Sep 6 - Sep 12 Sep 13 - Sep 19 Sep 20 - Sep 26

2. Return

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.

3. Sep 6 - Sep 12 Sep 13 - Sep 19 Sep 20 - Sep 26

5. Submit

6. Status will change back to Submitted.

6. Sep 6 - Sep 12 Sep 13 - Sep 19 Sep 20 - Sep 26