

Managing Resources with Clarity PPM

Version 15.8.1

Your Guide: Christi Rice

- Introduction
- Accessing the New User Experience
- Resource List
- Resource Profile & Properties
- Resource Calendar
- Resource & Team Allocation
- Team vs Resource
- Resource Management
- Time Tracking and Approval

A large, stylized graphic on the right side of the slide features a red-to-black gradient and a low-poly geometric pattern of triangles, resembling a stylized mountain or a digital landscape.

Agenda

Part I: Introduction



Resource Management Definition

- Resource Management is the efficient and effective use of organization resources when they are needed.
- Clarity PPM Resource Management is the practice of managing resources in order to have the right resources working on the right projects, at the right time based on real time project timelines as the project is further defined.
- Resource Management functionality in its totality includes forecasting capacity and demand, understanding over and under allocated resources and understanding how much time it has taken to deliver a specific project, or task. This functionality enables you to control and predict resource utilization throughout the Project lifecycle and across the organization.

Why is Resource Management Important?

- Reduces risk by enabling management to easily identify resourcing constraints.
- Enables alignment of resources to the highest priority projects.
- Reduces the amount of manual efforts required to develop and maintain resource plans.
- Improves ability to be more proactive and efficient in resourcing.
- Creates transparency of resource information.
- Provides consistent resource capacity vs. demand functionality and reporting at the resource, project, program and portfolio levels.

Keys to Success – Data Quality

- Resources are tracking all their worked hours in a timely manner as “accurately” as possible.
- Project Resource Allocations remain current based on the needs of the project.
 - Resource data within Clarity PPM is highly visible - If not maintained, incorrect business decisions will be made. For example:
 - Hiring additional contract resources when not necessary.
 - Delaying or starting a project based on incorrect resource availability.
 - Over / Under utilization of resources.
- Project timelines/schedules are kept current.
 - They represent the overall commitment of resources to the project – If the timeline changes, without an update within Clarity PPM, the resource's commitment is over/understated.
- Resources profiles are maintained (primary role, availability, calendars).

Resource Management Definitions

Term	Definition
Availability	The number of hours a resource is available to work on any given day. By default, resources in Clarity PPM are available 8 hours per day.
Allocation	The hours, or % of time, a resource is designated to perform work on a specific project.
Assignments	The amount of work designated for a resource on a specific task.
Capacity	Is the aggregated availability value of all resources that carry the same primary role.
Demand	Is the aggregated value of all allocations for a primary role.
ETC	Estimate to Complete. The number of hours it will take the resource to complete their work on the task. As actual time is tracked against the assignment, the ETC will decrement.
Actuals	Completed work (in hours) that the resource has booked on a specific task via timesheets.
Primary Function	Name of role the resource performs for the organization. This does not have to align to an HR title, but in some cases may.

Resource Management in Clarity PPM

Availability 1

- Complete Resource records
 - Team
 - Primary Function (Role)
 - Availability (if different than default)
 - Calendar

Allocations 2

- Establish Projects
- Allocate Team to projects to highlight unfilled demand
- Replace Team with specific resources
- Allocate resources to projects
- Confirm allocations

Utilization 3

- Track actual hours
- Develop detailed task level WBS
- Create task dependencies
- Create resource task assignments
- Define estimate to complete (ETCs) for each task assignment
- Schedule WBS to evaluate and optimize dependencies/assignments
- Re-schedule to ensure accurate forecasting of uncompleted work

Key Outputs to be Expected

What projects resources are allocated to?
What % of time they are supporting the projects?

How many resources do we have?
What function do the resources have?
When are they available for work?

What is the actual amount of time spent?
What is the forecasted amount of work effort remaining at a project level?

Resource Management Roles & Responsibilities

Resource Manager (RM)

- Approve timesheets
- Ensure timesheets are submitted on time
- Ensure resources are updating their Resource Calendar
- Monitor Resource Allocations as needed
- Communicate resource risks and issues to PMs & Leadership
- Work with Project Manager to resolve resource work conflicts

Project Manager (PM)

- Ensure Resource Allocations are sufficient to meet Project Demand
- Communicate resource issues to the Resource Manager & Leadership
- Add resource / team member to project and set agreed upon allocation

Team Member (TM)

- Enter timesheets weekly
- Update ETCs via timesheets as necessary
- Maintain non-working days in personal calendar

Part 2: Accessing the New User Experience



Differences - New UI vs Phoenix 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



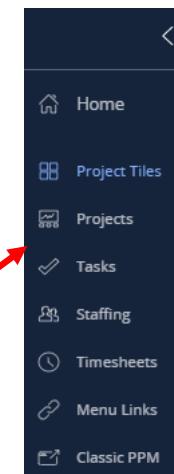
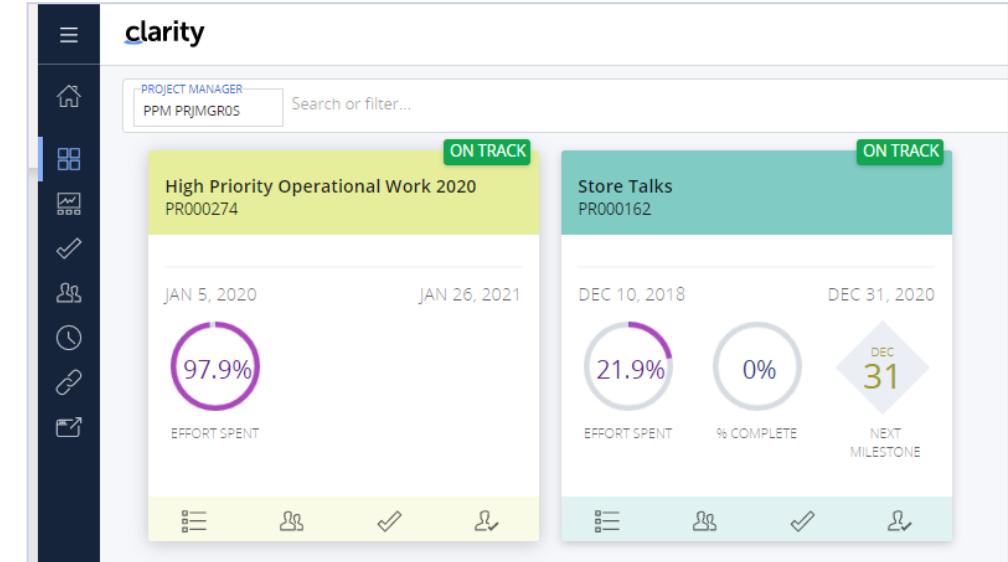
- Tasks



- Classic CA PPM (Phoenix View)



There is one additional icon on the top left corner of the page: When you click on this icon, it will expand the left navigation. It will 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
- Several icons will appear in the left navigation panel - Icons

- Expand navigation panel 

- Home 

- Menu Links 

- Still Access Portlets by hovering over Home 

- Using the Tabs at the top of the page to access:

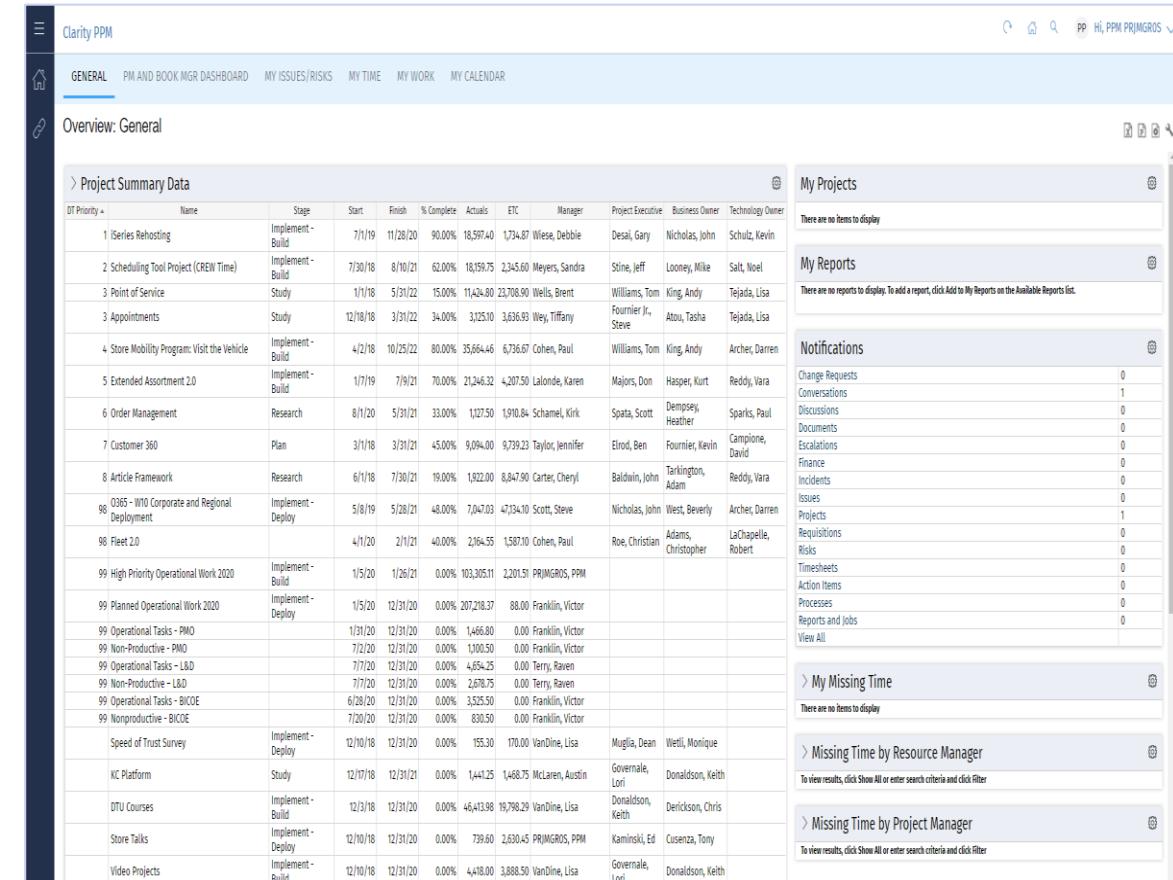
- Access the PM/BM Dashboard

- My Issues/Risks

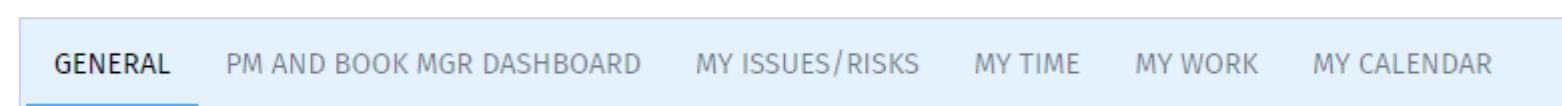
- My Time

- My Work

- My Calendar



DT Priority	Name	Stage	Start	Finish	% Completed	Actuals	ETC	Manager	Project Executive	Business Owner	Technology Owner
1	iSeries Rehosting	Implement - Build	7/1/19	11/28/20	90.00%	18,597.40	1,734.07	Wiese, Debbie	Desai, Gary	Nicholas, John	Schultz, Kevin
2	Scheduling Tool Project (CREW Time)	Implement - Build	7/30/18	8/10/21	62.00%	18,159.75	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%	312,510	3,636.93	Wey, Tiffany	Fournier Jr., Steve	Atos, 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%	1,327.50	1,910.84	Schamel, 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	Erod, Ben	Fournier, Kevin	Campione, David
8	Article Framework	Research	6/1/18	7/30/21	19.00%	1,922.00	8,847.90	Carter, Cheryl	Baldwin, John	Tarkington, Adam	Reddy, Vara
98	Q365 - W110 Corporate and Regional Deployment	Implement - Deploy	5/8/19	5/28/21	48.00%	7,047.03	47,134.10	Scott, Steve	Nicholas, John	West, Beverly	Archer, Darren
98	Fleet 2.0	Research	4/1/20	2/1/21	40.00%	2,154.55	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	2,201.51	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	Implement - Deploy	1/31/20	12/31/20	0.00%	1,466.80	0.00	Franklin, Victor			
99	Non-Productive - PMO	Implement - Deploy	7/2/20	12/31/20	0.00%	1,000.50	0.00	Franklin, Victor			
99	Operational Tasks - L&D	Implement - Deploy	7/7/20	12/31/20	0.00%	4,654.25	0.00	Terry, Raven			
99	Non-Productive - L&D	Implement - Deploy	7/7/20	12/31/20	0.00%	2,678.75	0.00	Terry, Raven			
99	Operational Tasks - BCOE	Implement - Deploy	6/28/20	12/31/20	0.00%	3,525.50	0.00	Franklin, Victor			
99	Nonproductive - BCOE	Implement - Deploy	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	1,488.75	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	

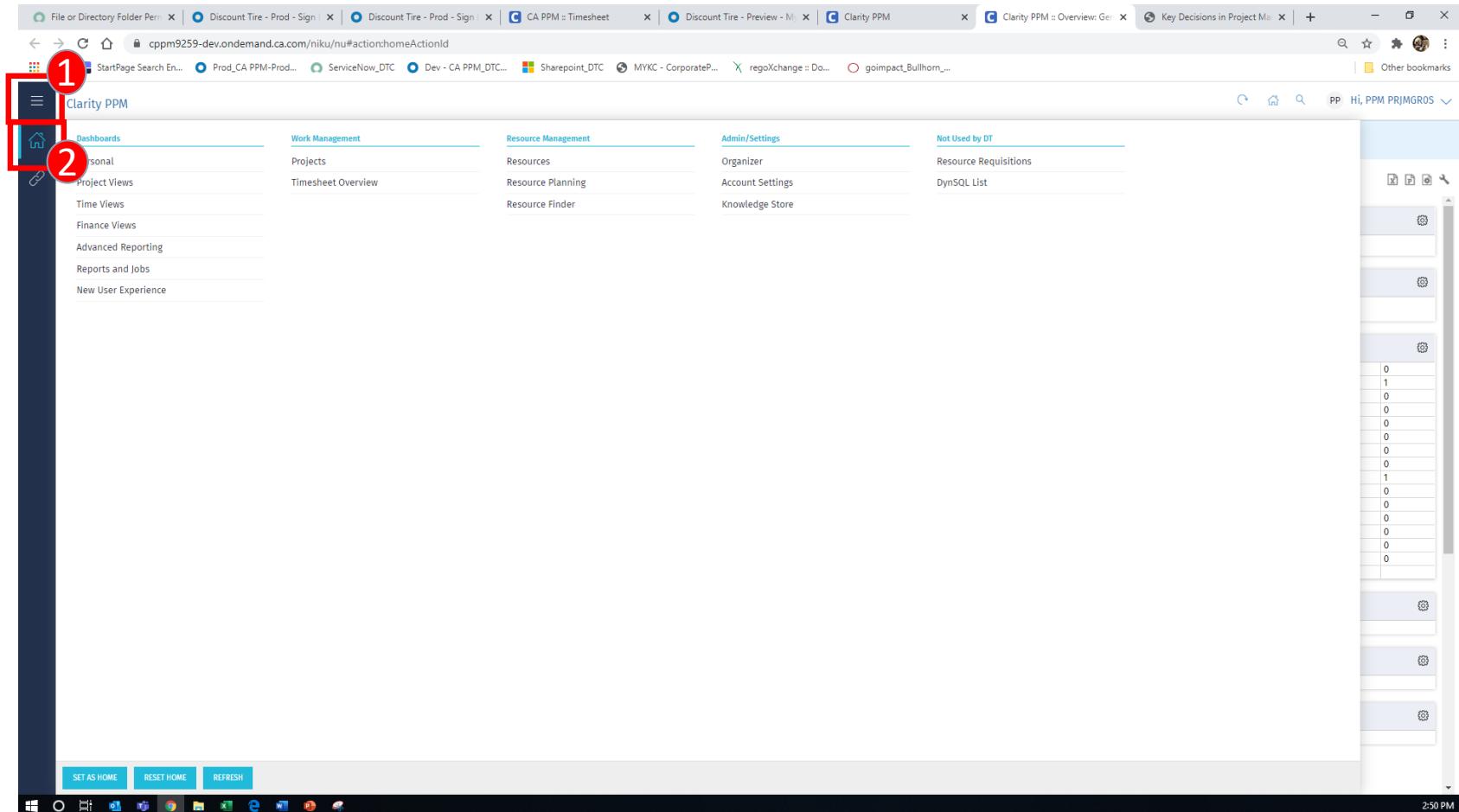


Differences - New UI vs Phoenix View

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 available portlets based on your security rights

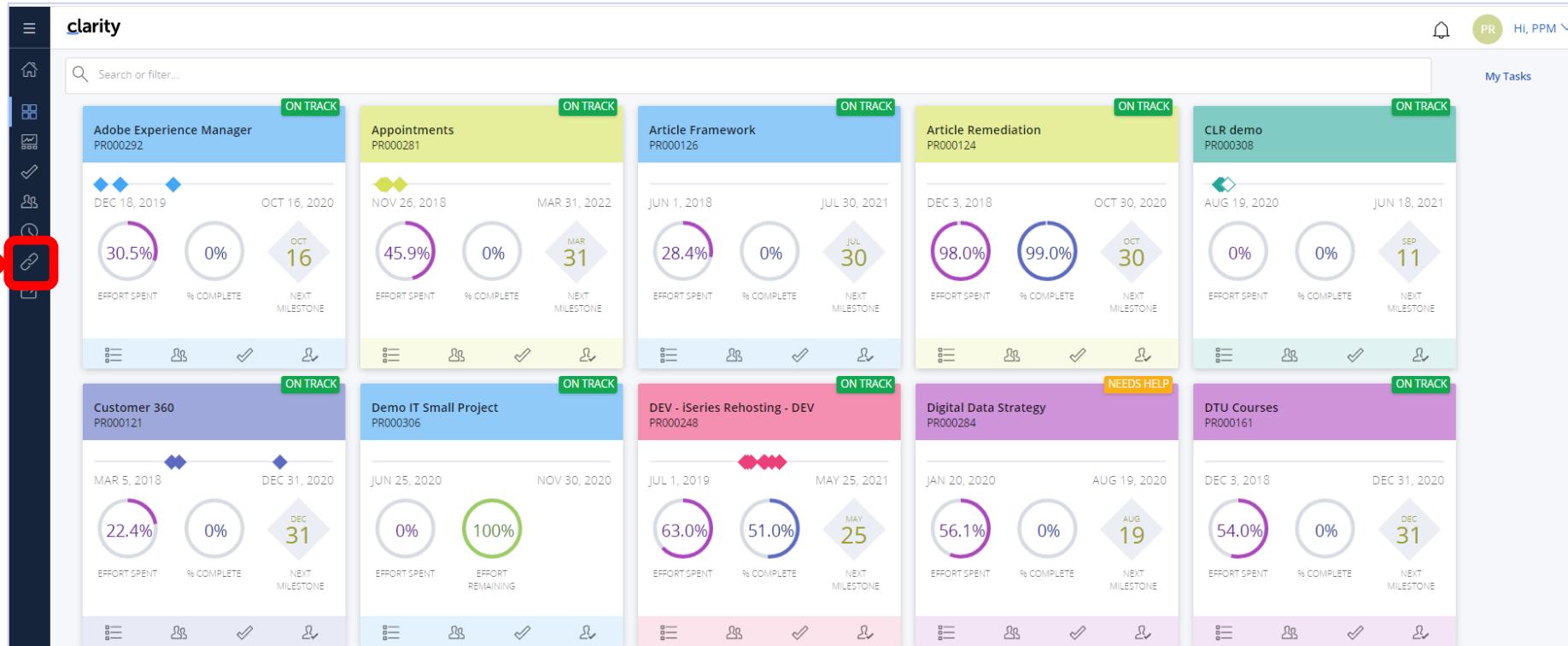


Part 3: Resource List



Accessing Resources

- The first step of resource management is validating resource properties.
- From the left navigation bar, select the Links icon. 

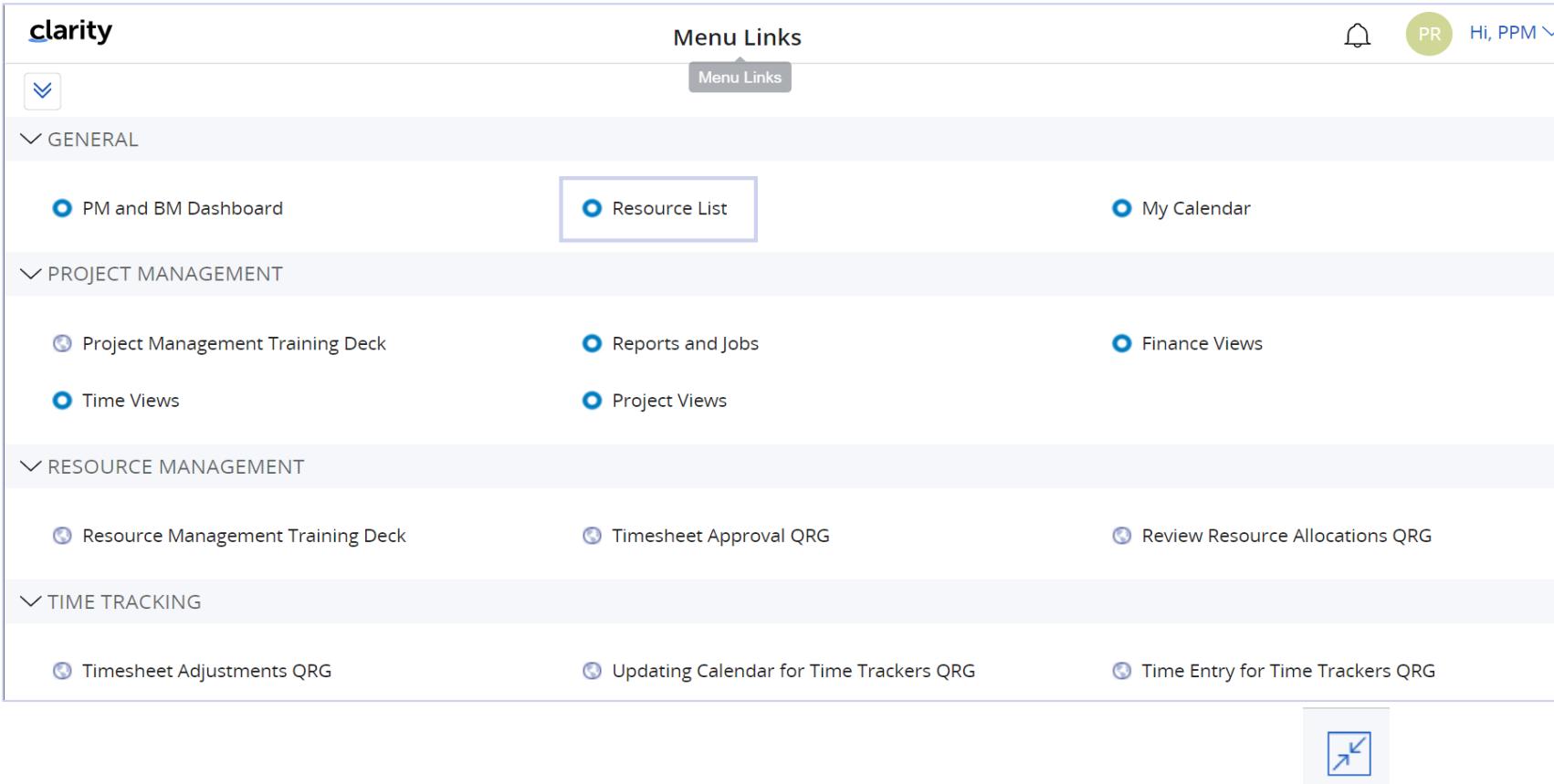


The screenshot shows the Clarity application interface. On the left, a vertical navigation bar features several icons, with the 'Links' icon (a blue square with a white chain symbol) highlighted by a red arrow. The main area displays a grid of project cards, each representing a different initiative. Each card includes the project name, ID, status (e.g., 'ON TRACK' or 'NEEDS HELP'), start and end dates, progress indicators (effort spent, % complete, next milestone), and a set of filter and sort icons below it.

Project	ID	Status	Start Date	End Date	Progress	Next Milestone
Adobe Experience Manager	PR000292	ON TRACK	DEC 18, 2019	OCT 16, 2020	30.5%	OCT 16
Appointments	PR000281	ON TRACK	NOV 26, 2018	MAR 31, 2022	45.9%	MAR 31
Article Framework	PR000126	ON TRACK	JUN 1, 2018	JUL 30, 2021	28.4%	JUL 30
Article Remediation	PR000124	ON TRACK	DEC 3, 2018	OCT 30, 2020	98.0%	OCT 30
CLR demo	PR000308	ON TRACK	AUG 19, 2020	JUN 18, 2021	0%	SEP 11
Customer 360	PR000121	ON TRACK	MAR 5, 2018	DEC 31, 2020	22.4%	DEC 31
Demo IT Small Project	PR000306	ON TRACK	JUN 25, 2020	NOV 30, 2020	0%	100%
DEV - iSeries Rehosting - DEV	PR000248	ON TRACK	JUL 1, 2019	MAY 25, 2021	63.0%	MAY 25
Digital Data Strategy	PR000284	NEEDS HELP	JAN 20, 2020	AUG 19, 2020	56.1%	AUG 19
DTU Courses	PR000161	ON TRACK	DEC 3, 2018	DEC 31, 2020	54.0%	DEC 31

Resource List

- Under the “General” drop-down arrow, click on **Resource List**. This will bring you into the Resource List in classic Clarity PPM.



The screenshot shows the Clarity PPM menu interface. At the top, there is a logo and a "Menu Links" button. On the right, there is a user profile with the initials "PR" and the greeting "Hi, PPM". The menu is organized into several sections: "GENERAL", "PROJECT MANAGEMENT", "RESOURCE MANAGEMENT", and "TIME TRACKING". Each section contains three items. The "GENERAL" section has "PM and BM Dashboard", "Resource List" (which is highlighted with a blue box), and "My Calendar". The "PROJECT MANAGEMENT" section has "Project Management Training Deck", "Reports and Jobs", and "Finance Views". The "RESOURCE MANAGEMENT" section has "Resource Management Training Deck", "Timesheet Approval QRG", and "Review Resource Allocations QRG". The "TIME TRACKING" section has "Timesheet Adjustments QRG", "Updating Calendar for Time Trackers QRG", and "Time Entry for Time Trackers QRG".

Resource List

- Click the Expand Filter button () to open the filter section of the page if it is collapsed.
- The top portion of the screen is a set of filters giving the ability to search for resources meeting specific criteria.
- The bottom portion of the screen is a list displaying the results of the filter criteria.

Resource List

 Filter: System Default 

RESOURCE/TEAM NAME	RESOURCE MANAGER
<input type="text"/>	<input type="text"/>

RESOURCE/ROLE ID	BOOKING MANAGER
<input type="text"/>	<input type="text"/>

OBS UNIT	PRIMARY FUNCTION
<input type="text"/> 	<input type="text"/> 

OBS UNIT - FILTER MODE	ACTIVE
Unit and descendants 	Yes 

EMPLOYMENT TYPE	OPEN FOR TIME ENTRY
All 	All 

TEAM	IS TEAM
<input type="text"/> 	All 

FILTER MODE	POWER FILTER
Selected only 	[Build Power Filter] 

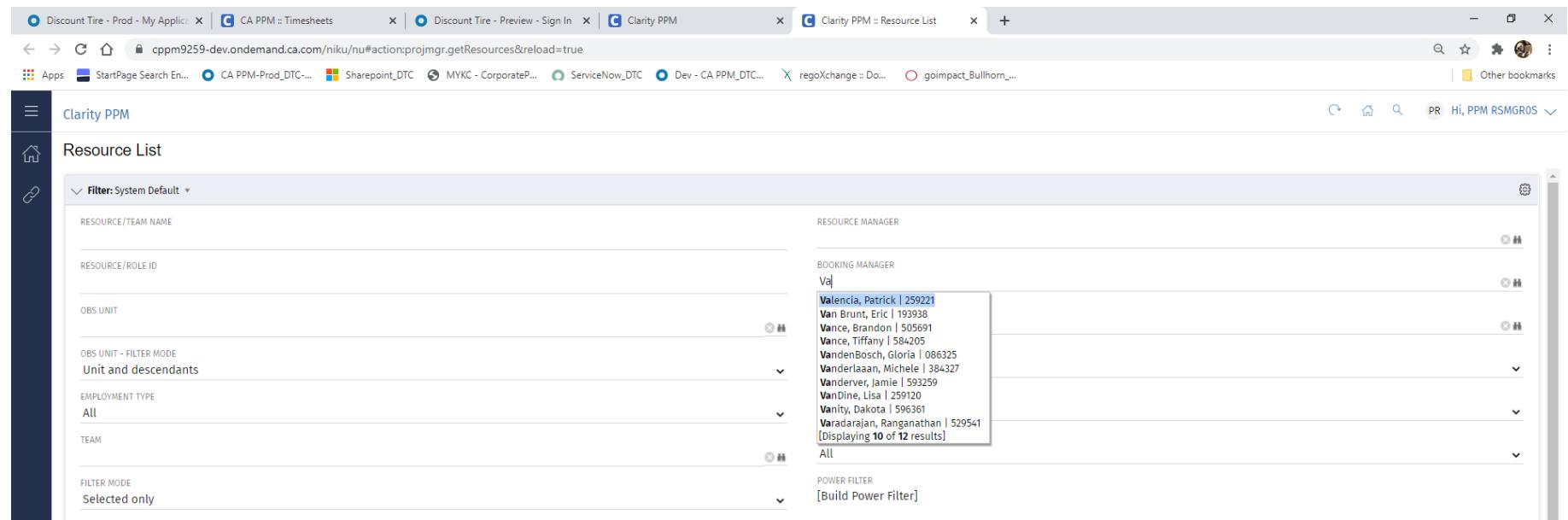
FILTER **SHOW ALL** **SAVE FILTER** **CLEAR**

Resource/Team	Resource/Role ID	Resource Manager	Booking Manager	Clarity Start Date	Clarity End Date	Employment Type	Team	Primary Function	Email Address
TEST, Resource Manager	16827534 					Employee			rmtest@email.com

Displaying 1-1 of 1 

Filters and How They Work

- Browse fields  have auto-suggest functionality.
 - In this example the text “Va” has been entered in the Booking Manager field. Matches are available in the list. Select the correct name and click Filter.
 - Use the  to remove an item from the selection.
- Use a filter or a combination of filters to find resources.
- Depending on your level of access you may see more or less resources when you access the resource list.



The screenshot shows a web browser window with multiple tabs open. The active tab is 'Clarity PPM :: Resource List'. The page displays a 'Resource List' with various filter options on the left, including 'Filter: System Default', 'RESOURCE/TEAM NAME', 'RESOURCE/ROLE ID', 'OBS UNIT', 'OBS UNIT - FILTER MODE (Unit and descendants)', 'EMPLOYMENT TYPE (All)', 'TEAM', and 'FILTER MODE (Selected only)'. On the right, there are sections for 'RESOURCE MANAGER' and 'BOOKING MANAGER'. In the 'BOOKING MANAGER' section, the text 'Va' is typed into a search input field, and a dropdown menu lists 10 results out of 12. The results are: Valencia, Patrick | 259221, Van Brunt, Eric | 193938, Vance, Brandon | 505691, Vance, Tiffany | 584205, VandenBosch, Gloria | 086325, Vanderlaan, Michele | 384327, Vanderver, Jamie | 593259, VanDine, Lisa | 259120, Vanity, Dakota | 596361, Varadarajan, Ranganathan | 529541. The text '[Displaying 10 of 12 results]' is also visible. At the bottom of the page, there is a 'POWER FILTER' section with the text '[Build Power Filter]'. The browser's address bar shows the URL 'cppm9259-dev.ondemand.ca.com/niku/nu#action:projmgr.getResources&reload=true'.

Saving a Filter

- To Save the filter for future use, click the Save Filter button.
- The Save Filter dialogue box appears.
- Name the filter. It is required and must be unique.
- If you would like this filter to be applied by default each time you visit this page, check Default.
- Click Save and Return.
- The filter is now available from the Filter drop-down.



Content: Resource Filter - Save Filter



Exercise - Review Resource Profile



- Navigate to Home → Menu Links → Resource List → Resources.
- Expand the filter (if needed).
- Enter your filter criteria.
 - Clear the filter (using the Clear button).
 - Search for yourself in the Resource Manager search field.
 - Click Filter.
- Click Save Filter.
 - Enter the Filter Name (e.g. My Resources).
 - Click Default.
 - Click Save and Return.
- Click a name to access a Resource Profile.

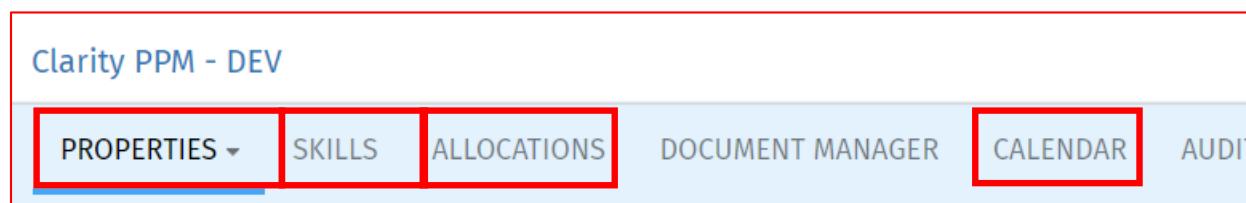
** Note – if there are no resources who report to you, filter for yourself, and view your own resource profile.

Part 4: Resource Profile & Properties



The Resource Profile

- In order for Resource Management to function appropriately, it is necessary for the fundamental resource data within Clarity PPM to be current and accurate at all times.
 - **Properties Tab** – Provides the detail that feeds into the overall functional capabilities of the resource (Primary Function & Team) and the amount of time the resource is able to work (Availability).
 - **Skills Tab** – Identifies the abilities of a resource to perform tasks within a project. (We are not using the list but you can use it if desired.)
 - **Allocations Tab** – The commitment of the resource to work a set amount of time on a project.
 - **Calendar Tab** – Aligned to the organization's holidays and planned days off. Determines days the resource is available to work on projects.



Resource Properties: Main – General

- Last Name – Resource Last Name
- First Name – Resource First Name
- Resource ID – Unique ID used for identifying the resource in Clarity PPM
- Email Address – Address to which Clarity PPM will send notifications
- Resource Manager – Can approve timesheets
- Booking Manager - Individual who is responsible for the resource's timesheet approval (if resource is on your team but has a different resource manager than you)
- Team – Name of Agile or Functional Team
- Primary Function - Classification for the type of work the resource performs on a project (e.g., Developer, Project Manager)
- Employment Type – Indicates whether the resource is an Employee or Contractor
- Availability – Number of hours that the resource is planned to work on a full business day

Clarity PPM - DEV

Properties Skills Allocations Document Manager Calendar Audit

Resource-Labor: Raven Terry - Main - General

General

LAST NAME Terry

FIRST NAME Raven

RESOURCE ID 558510

EMAIL ADDRESS raven.terry@discounttire.com

CLARITY START DATE 10/28/2018

CLARITY END DATE

Organizational Breakdown Structures

DEPARTMENT OBS /Discount Tire/Discount Tire/Strategic Business Services/PMO/McPherson, John

DT ORGANIZATIONAL OBS /Zwieback, Michael-259134/Muglia, Dean-101754/Ginsberg, David-529737/Elrod, Ben-558523/McPherson, John-422886

SAVE SAVE AND RETURN RETURN

Required Unique



Tip: Depending on your level of access – you may have Read-Only access to Resource information.

Resource Properties: Main – General

Organizational Breakdown Structure (OBS)

The OBS is a hierarchical structure that outlines the framework of the organization. Projects and Resources are 'attached' to levels within the OBS.

Discount Tire utilizes two OBS's for Projects and Resources:

- Department OBS – defaulted to “Discount Tire”
 - This then gets updated based off of the booking manager name.
- Organization OBS – Based on Manager/Direct reports

Clarity PPM - DEV

Properties Skills Allocations Document Manager Calendar Audit

RT Hi, Resource Manager TEST

Resource-Labor: Raven Terry - Main - General

General

LAST NAME Terry

FIRST NAME Raven

RESOURCE ID 558510

EMAIL ADDRESS raven.terry@discounttire.com

CLARITY START DATE 10/28/2018

CLARITY END DATE

RESOURCE MANAGER McPherson, John

BOOKING MANAGER McPherson, John

TEAM PMO

PRIMARY FUNCTION Administrator - Application

EMPLOYMENT TYPE Employee

AVAILABILITY 8.00

Organizational Breakdown Structures

DEPARTMENT OBS /Discount Tire/Discount Tire/Strategic Business Services/PMO/McPherson, John

DT ORGANIZATIONAL OBS /Zwieback, Michael-259134/Muglia, Dean-101754/Ginsberg, David-529737/Elrod, Ben-558523/McPherson, John-422886

SAVE SAVE AND RETURN RETURN

[Notes]

Required Unique

Resource Properties: Main – General

- **Clarity Start Date** – the first day the user is available for work in Clarity. This may not align to the first day you started at Discount Tire.
- **Clarity End Date** – the last day the resource is available for work in Clarity. This may not align to the last day you are at Discount Tire.

Clarity PPM - DEV

RT Hi, Resource Manager TEST ▾

PROPERTIES ▾ SKILLS ALLOCATIONS DOCUMENT MANAGER CALENDAR AUDIT

Resource-Labor: Raven Terry - Main - General

General

LAST NAME Terry	RESOURCE MANAGER McPherson, John
FIRST NAME Raven	BOOKING MANAGER McPherson, John
RESOURCE ID 558510	TEAM PMO
EMAIL ADDRESS raven.terry@discounttire.com	PRIMARY FUNCTION Administrator - Application
CLARITY START DATE 10/28/2018	EMPLOYMENT TYPE Employee
CLARITY END DATE 	AVAILABILITY 8.00

Organizational Breakdown Structures

DEPARTMENT OBS /Discount Tire/Discount Tire/Strategic Business Services/PMO/McPherson, John
DT ORGANIZATIONAL OBS /Zwieback, Michael-259134/Muglia, Dean-101754/Ginsberg, David-529737/Elrod, Ben-558523/McPherson, John-422886

SAVE SAVE AND RETURN RETURN [Notes]

□ = Required * = Unique

Part 5: Resource Calendar



Resource Calendar

- The Resource Calendar is used to determine the days the resource is available to perform project-related work. It takes into account:
 - Weekends
 - Corporate Holidays
 - Vacation and long-term leave
 - Non-Planned time off does not need to be retroactively entered
- Resources are associated with a “Base” calendar within the system. The base calendar typically identifies corporate holidays as non-working days for a particular location or department in an organization.
- The resource then maintains their personal calendar by adding additional personal non-working days, thereby presenting a total picture of the resource's individual availability.

Updating Resource Calendar

- To access your resources' calendars, you will search for them in the Resource List.
- Once they are populated, click the resource's name to open their properties.

Resource List

The screenshot shows the 'Resource List' interface with various filter options and a table of resources.

Filter Options:

- RESOURCES/TEAM NAME: RSMGROS, PPM (highlighted with a red box)
- RESOURCES/ROLE ID:
- OBS UNIT:
- OBS UNIT - FILTER MODE: Unit and descendants
- EMPLOYMENT TYPE: All
- RESOURCE TYPE: All
- BOOKING MANAGER:
- PRIMARY FUNCTION:
- ACTIVE: All
- OPEN FOR TIME ENTRY: All
- IS TEAM: All

Buttons:

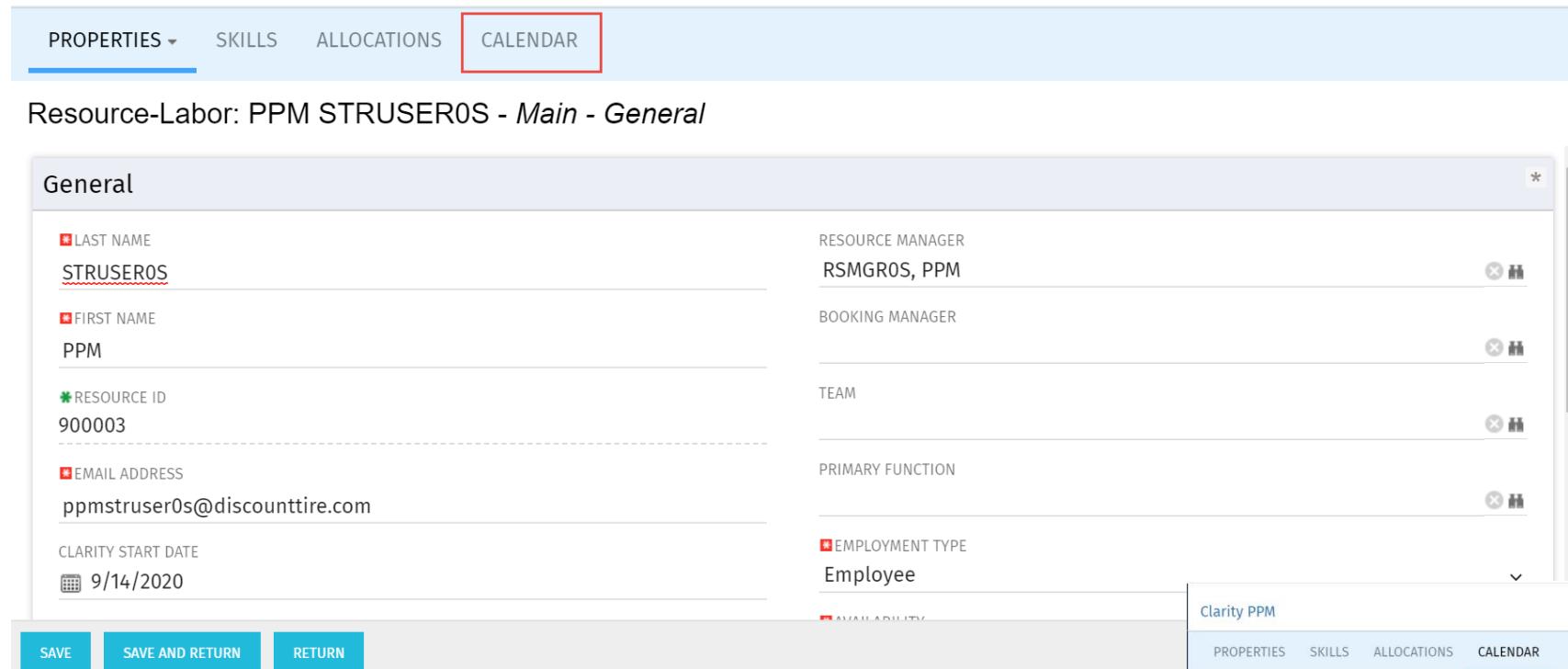
- FILTER (highlighted with a red box)
- SHOW ALL
- SAVE FILTER
- CLEAR

Table of Resources:

	Resource/Team	Resource/Role ID	Resource Manager	Booking Manager	Clarity Start Date	Clarity End Date	Employment Type	Team	Primary Function	Email Address
<input type="checkbox"/>	PRJMGROS, PPM	900002	RSMGROS, PPM		9/14/20		Employee			ppmprjmgr0s@discounttire.com
<input type="checkbox"/>	STRUSEROS, PPM	900003	RSMGROS, PPM		9/14/20		Employee			ppmstruser0s@discounttire.com

Updating Resource Calendar

- Select the Calendar tab



Resource-Labor: PPM STRUSER0S - *Main - General*

General

LAST NAME: STRUSEROS

FIRST NAME: PPM

RESOURCE ID: 900003

EMAIL ADDRESS: ppmstruser0s@discounttire.com

CLARITY START DATE: 9/14/2020

RESOURCE MANAGER: RSMGROS, PPM

BOOKING MANAGER:

TEAM:

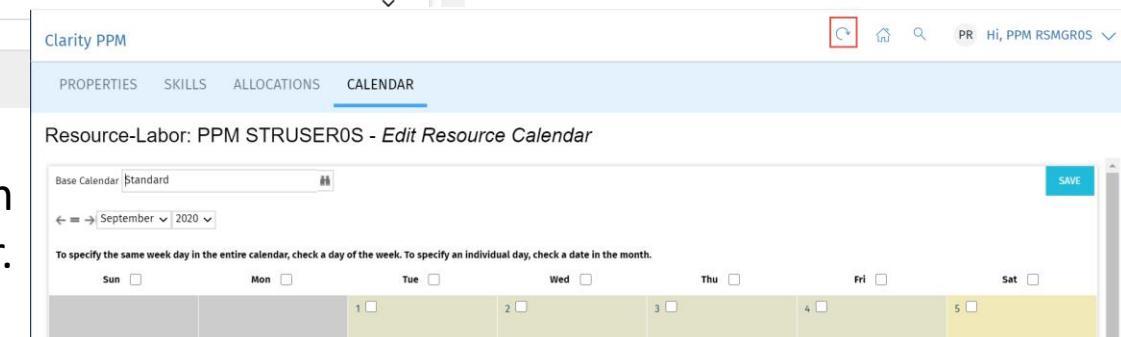
PRIMARY FUNCTION:

EMPLOYMENT TYPE: Employee

AVAILABILITY:

Buttons: SAVE, SAVE AND RETURN, RETURN

Note: If the calendar does not load, click on the Refresh button on the top right of the screen. This should load the calendar.



Clarity PPM

Properties Skills Allocations Calendar

Resource-Labor: PPM STRUSER0S - *Edit Resource Calendar*

Base Calendar: Standard

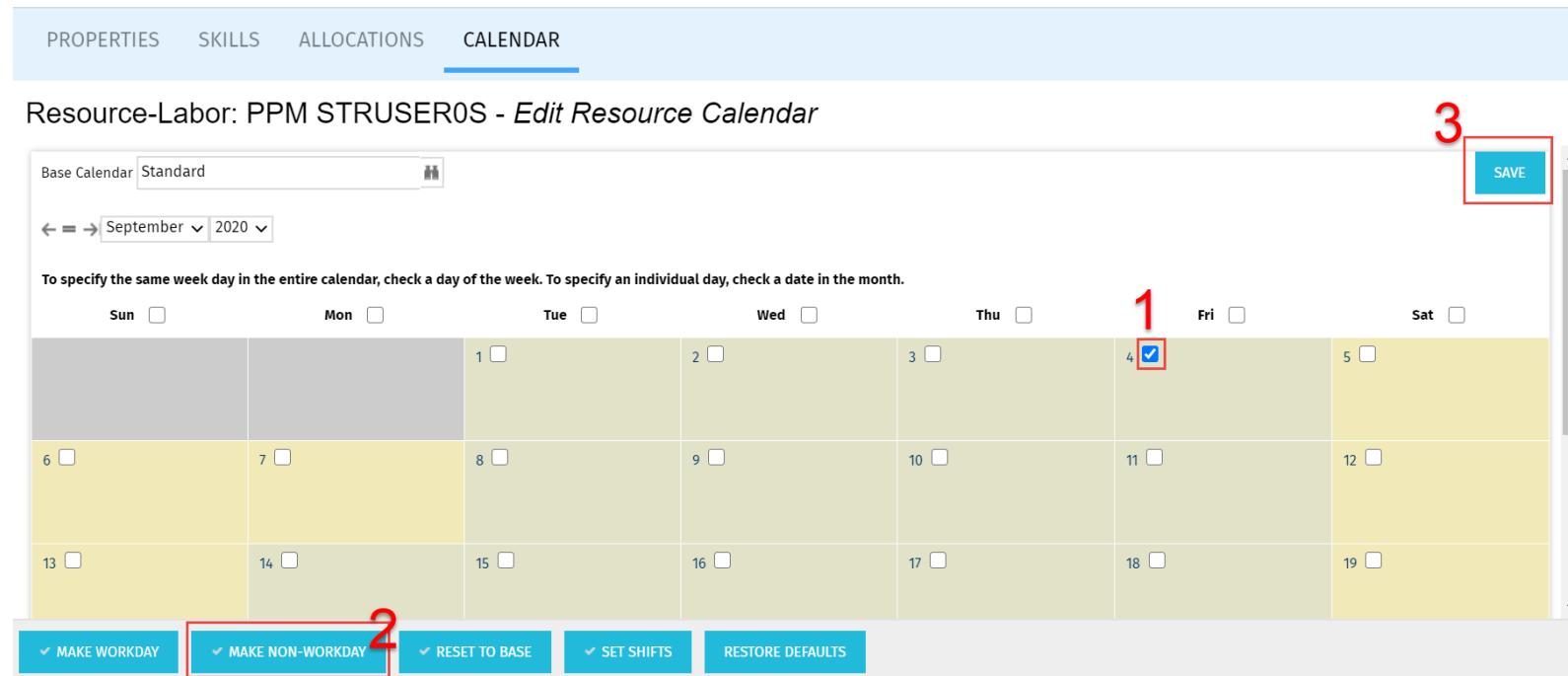
← → September 2020

To specify the same week day in the entire calendar, check a day of the week. To specify an individual day, check a date in the month.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5

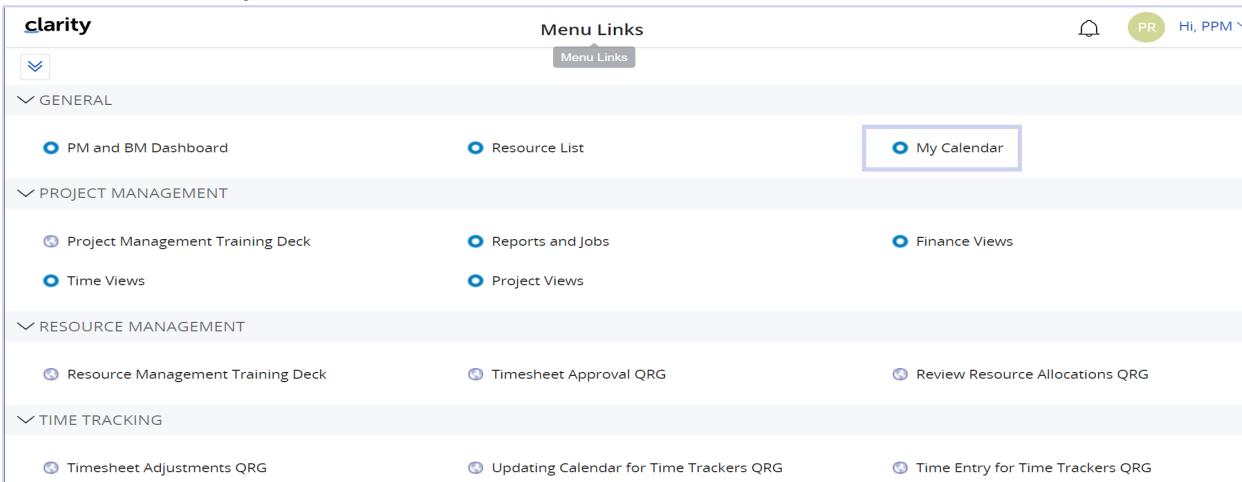
Updating Resource Calendar

- To navigate within the calendar, use the arrows or the month and year drop downs.
- (1)Click the checkbox(es) and click (2)Make Non-Workday to designate additional days as non-working day(s).
- Click on the (3)Save button once you have completed marking the resource's planned days off.

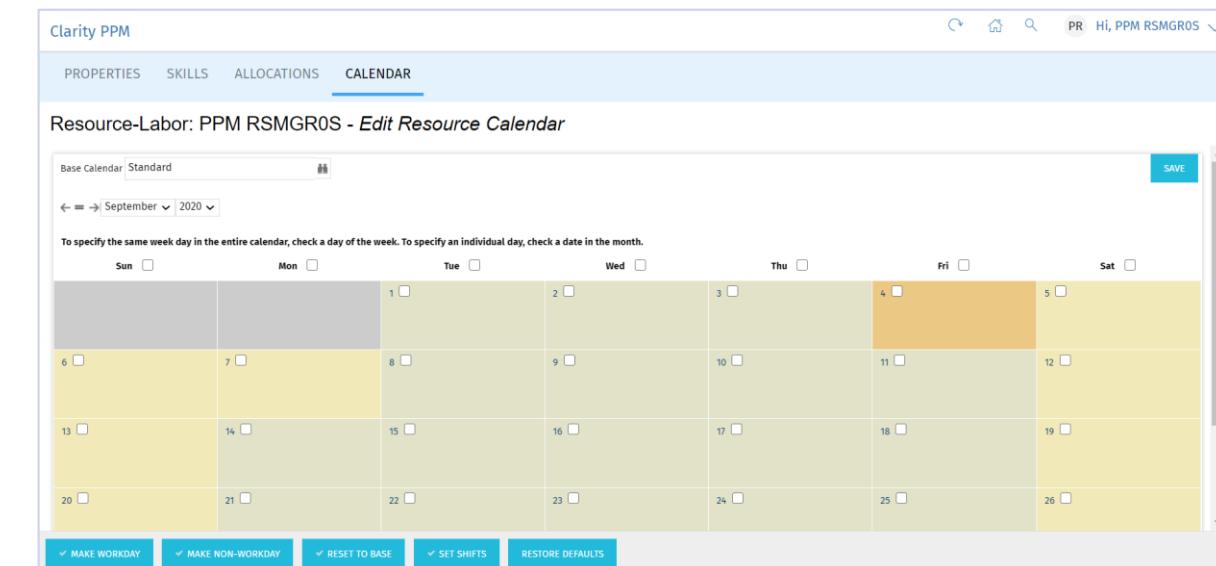


Personal Calendar Maintenance

- On the left-hand side navigation, select the Menu Links icon. 
- Under the “General” drop-down arrow, click on  **My Calendar**. This will bring you into your Calendar in classic Clarity PPM.

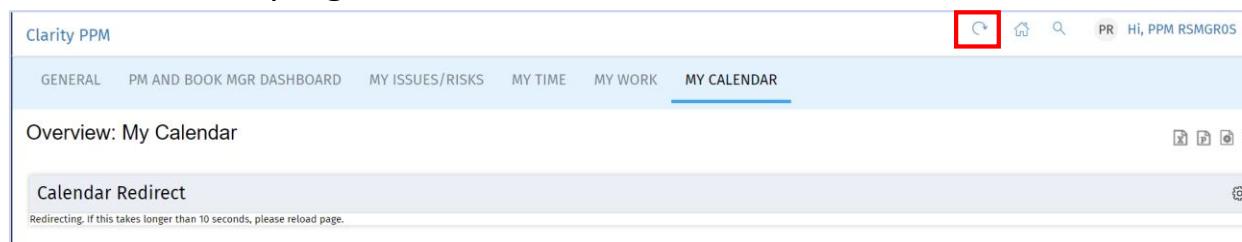


The screenshot shows the 'Menu Links' page in Clarity PPM. The left sidebar has sections for GENERAL, PROJECT MANAGEMENT, RESOURCE MANAGEMENT, and TIME TRACKING, each with various links. The 'My Calendar' link under the GENERAL section is highlighted with a blue box.



The screenshot shows the 'Edit Resource Calendar' page for 'Resource-Labor: PPM RSMGR0S'. The calendar grid for September 2020 is displayed, with specific days highlighted in different colors (grey, yellow, orange). The 'CALENDAR' tab is selected. At the bottom, there are buttons for 'MAKE WORKDAY', 'MAKE NON-WORKDAY', 'RESET TO BASE', 'SET SHIFTS', and 'RESTORE DEFAULTS'.

Note: If the calendar does not load, click on the Refresh button on the top right of the screen. This should load the calendar.



The screenshot shows the 'My Calendar' page in Clarity PPM. The 'MY CALENDAR' tab is selected. A red box highlights the refresh icon (a circular arrow) in the top right corner. The page displays an 'Overview: My Calendar' section with a 'Calendar Redirect' message: 'Redirecting. If this takes longer than 10 seconds, please reload page.'

Personal Calendar Maintenance

- To navigate within the calendar, use the arrows or the month and year drop downs.
- Corporate holidays and weekends have already been marked as non-working days in the base calendar.



Tip: Legend is located at the bottom of the calendar

Clarity PPM - DEV

PROPERTIES SKILLS ALLOCATIONS DOCUMENT MANAGER CALENDAR AUDIT

Resource-Labor: Raven Terry - *Edit Resource Calendar*

Base Calendar Standard

March 2020

To specify the same week day in the entire calendar, check a day of the week. To specify an individual day, check a date in the month.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

MAKE WORKDAY MAKE NON-WORKDAY RESET TO BASE SET SHIFTS RESTORE DEFAULTS

= Workday (Base Calendar) = Workday (Exception) = Non-Workday (Base Calendar) = Non-Workday (Exception)

Personal Calendar Maintenance

- Click the checkbox(es) and click Make Non-Workday to designate additional days as non-working day(s).
- Click on the Save button once you have completed marking your planned days off.



Tip: Non-working day(s) are also shaded on the resources timesheet

Resource Calendar Definitions

✓ MAKE WORKDAY

✓ MAKE NON-WORKDAY

✓ RESET TO BASE

✓ SET SHIFTS

RESTORE DEFAULTS

- **Make Workday** – Changes planned days off, weekends and corporate holidays to work days.
- **Make Non-Workday** – Used for identifying planned days off.
- **Reset to Base** – Updates selected items back to base calendar setup.
- **Set Shifts** – Adjust timeframes that the resource is available for project work.
- **Restore Defaults** – Sets entire calendar back to Base Calendar.

= Workday (Base Calendar)

= Workday (Exception)

= Non-Workday (Base Calendar)

= Non-Workday (Exception)

- **Workday (Base Calendar)** – Workday, as set by the base calendar.
- **Workday (Exception)** – Workday that was set by the user, overriding the base calendar holiday or weekend default setting.
- **Non-Workday (Base Calendar)** – Weekends and holidays designated by the base calendar.
- **Non-Workday (Exception)** – Planned time off entered by the user.

Exercise



- Go to My Calendar  in Menu Links. 
- Mark the first week of the next month as non-work days.

Part 6: Teams vs Resources



Clarity PPM Team

- Team, Primary Function & Resource.
 - **Team:** Placeholder representing the need for a team's participation on a project.
 - **Primary Function:** – Represents the specific skill or role a project needs for a project. For example: Developer - Back End.
 - **Resource:** Named resource placed on a project to perform a function. For example: Beth Smith is assigned as the Project Manager, Jeff Taylor as the Developer and Jim Adams as the QA.
- **Teams and Primary Function** are used for planning purposes when a named resource is not readily known or a soon to-be-hired resource has not been designated. Once the named resource is determined, the Team is replaced on the project.

Utilizing Team

- **Team** is used when:
 - A named resource is not known.
 - Primary Function is added so more detail is known.
- Clarity PPM views **Team** on the project team as demand .
 - The team, by definition, does not represent an actual person that will perform the activities on the project.
 - Clarity PPM designates this as Unfilled Demand

Allocation of the Resource

- Once the Resource has been added to the project team - allocation needs to be updated by the Project Manager based on discussion with the Resource Manager.
- **Allocation** of a resource occurs at the project level. Allocation represents the resource manager's overall level of commitment of the resource to the project.
- **Assignment** of a resource occurs at the task level. The project manager assigns resources to particular tasks on the project.
 - Assignments can only occur AFTER the resource has been added to the team tab.

Identifying a Resource to Replace the Team

- The team is allocated to the project as a generic placeholder on the project team.
 - The PM will replace the team, and each of its assignments, with the named resource.
 - The named resource inherits the Start-Finish dates and % Allocation that were associated with the role.
- The unfilled demand established by allocating the team will become 'filled ' by the commitment of the named resource to the project.
- If the named resource has a different primary function than the role that is being filled on the project, leave the resource's primary function that is assigned on the resource record.

Part 7: Resource and Team Allocation

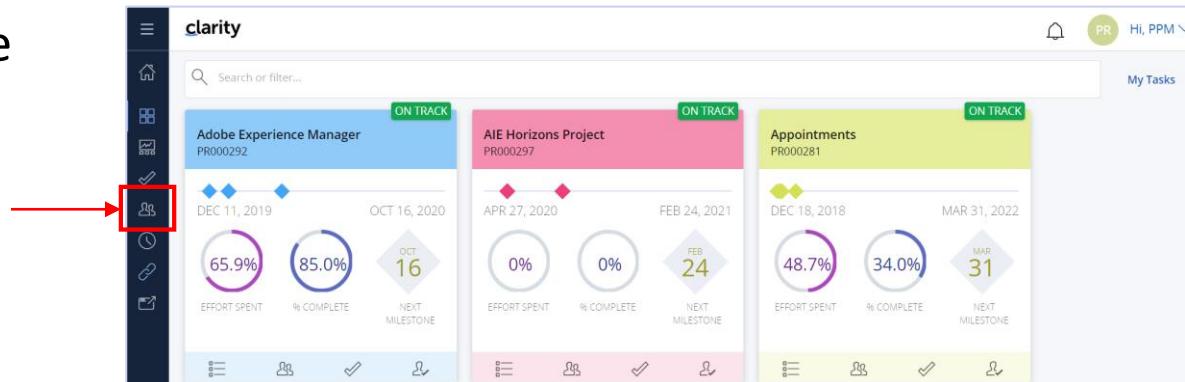


Allocating Resources to Projects

- Resources will be allocated to one or more projects on which they will perform work.
 1. Project Managers and Resource Managers will coordinate to identify the team member(s) that will work on that project and agree upon an allocation for the identified resource(s).
 2. Project Managers will then add the identified resource(s) to their project team in Clarity PPM and enter in the agreed upon allocation percent.
 3. The Resource Manager is responsible to enter operational allocations on the Staffing page.
 4. The below instructions will guide you to review your team's project allocations and set operational allocations as a Resource Manager.

Accessing Team Member Allocations

- Select the Staffing icon to access the list of resources' allocations.



- You will land on this screen.

The screenshot shows the Clarity Staffing screen with a grid of team members and their FTE allocations. The grid includes columns for Sep 2020, Oct 2020, Nov 2020, Dec 2020, Jan 2021, Feb 2021, Mar 2021, Apr 2021, and May 2021. The total FTE for all team members is 169.40. A red arrow points to the grid. The interface includes a search bar, a 'Resources' tab, and a 'Investments' tab.

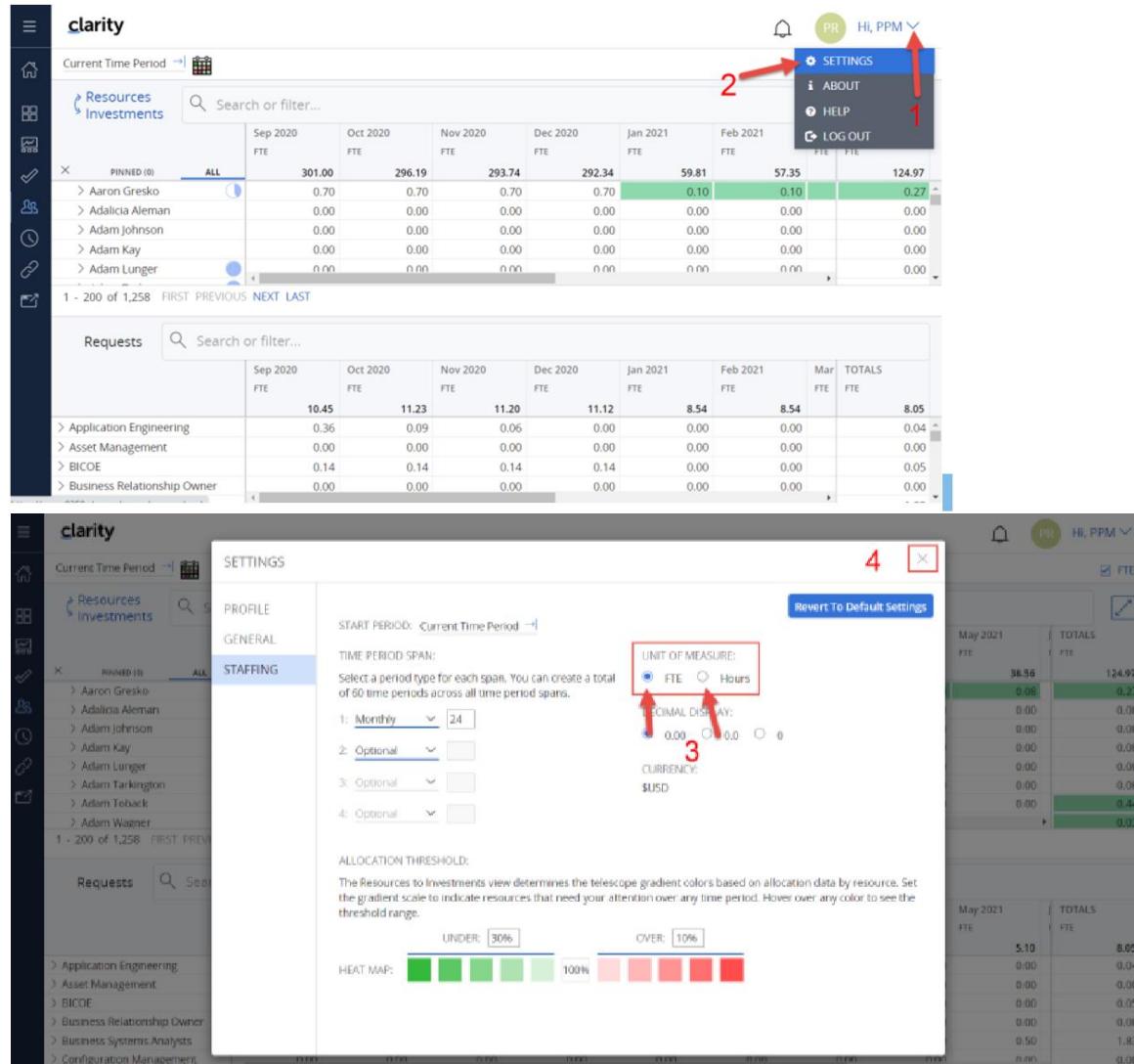
	Sep 2020 FTE	Oct 2020 FTE	Nov 2020 FTE	Dec 2020 FTE	Jan 2021 FTE	Feb 2021 FTE	Mar 2021 FTE	Apr 2021 FTE	May 2021 FTE	TOTALS FTE
Aaron Gresko	360.14	360.53	353.50	346.45	135.22	106.83	100.40	82.92	169.40	0.56
Abhay Joshi	1.12	1.12	1.04	1.02	0.42	0.42	0.42	0.40	0.00	0.00
Abraham Janne	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Adalicia Aleman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Adam Johnson	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

	Sep 2020 FTE	Oct 2020 FTE	Nov 2020 FTE	Dec 2020 FTE	Jan 2021 FTE	Feb 2021 FTE	Mar 2021 FTE	Apr 2021 FTE	May 2021 FTE	TOTALS FTE
Business Systems Analysts	0.25	1.50	2.08	2.65	3.37	3.45	3.45	3.45	2.45	0.32
Integration Engineering	0.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.83
Merch/PM&D	0.00	0.00	0.33	0.65	0.65	0.65	0.65	0.65	0.65	0.41
Organizational Change Manage...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Team Member Allocations

FTE or Hours View Settings:

1. If you would like to see allocations with the Full Time Equivalent or the Hours view, select the drop down arrow  next to your user name in the upper right hand corner.
2. Select Settings. 
3. In the Unit of Measure section, select the radio dial button for the measure you would like displayed in the Staffing view.
4. Press the  icon to close the window and return to the Staffing view



The screenshot shows the Clarity application interface. At the top right, a user dropdown menu is open, showing options: 'SETTINGS' (highlighted with a red box and arrow 2), 'ABOUT', 'HELP', and 'LOG OUT'. Below the user dropdown, a 'REQUESTS' section is visible. The main area shows two tables of data: 'Resources' and 'Investments'. The 'Resources' table has columns for Sep 2020, Oct 2020, Nov 2020, Dec 2020, Jan 2021, Feb 2021, Mar, and TOTALS. The 'Investments' table has similar columns. In the bottom right, a 'Staffing' view is shown with a table for May 2021. A 'SETTINGS' dialog box is overlaid on the main view. The 'STAFFING' tab is selected. It contains settings for 'UNIT OF MEASURE' (radio buttons for 'FTE' and 'Hours', with 'FTE' selected), 'DECIMAL DISPLAY' (radio buttons for '0.00', '0.0', and '0', with '0.00' selected), and 'CURRENCY' (radio buttons for '\$USD', 'Optional', and 'Optional', with '\$USD' selected). A red box and arrow 1 points to the user dropdown. A red box and arrow 2 points to the 'SETTINGS' button in the dialog. A red box and arrow 3 points to the 'UNIT OF MEASURE' radio buttons. A red box and arrow 4 points to the close button in the top right corner of the dialog.

Team Member Allocations

Filter for your Resources:

1. Click into the *Search or Filter...* field to show the different options to filter by.
2. Select the Resource Manager **RESOURCE MANAGER** option.
3. Start to type your last name until you see your full name appear.
4. Select the check box next to your name.

The screenshots illustrate the process of filtering team member allocations. In the top screenshot, a red arrow points to the 'SEARCH OR FILTER...' field, and another red arrow points to the 'RESOURCE MANAGER' option in the dropdown menu. In the bottom screenshot, a red box highlights the search field containing 'mcph', and a red arrow points to the checked checkbox next to 'John McPherson' in the list of results.

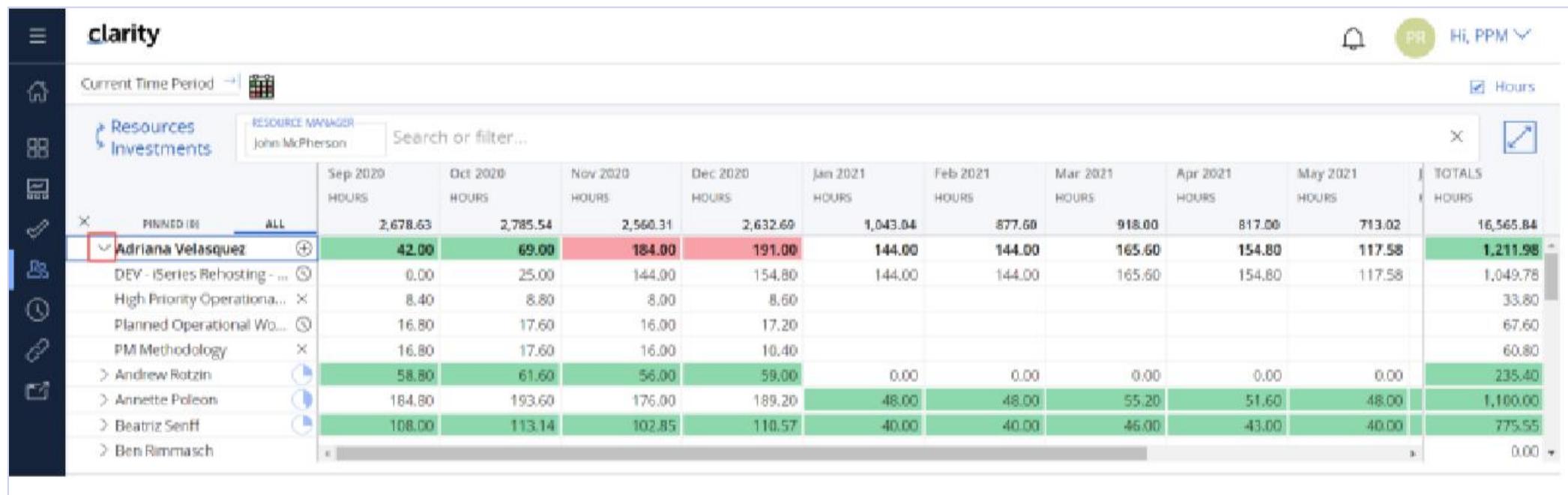
	Sep 2020 HOURS	Oct 2020 HOURS	Nov 2020 HOURS	Dec 2020 HOURS	Jan 2021 HOURS	Feb 2021 HOURS	Mar 2021 HOURS	Apr 2021 HOURS	May 2021 HOURS	TOTALS HOURS
> Application Engineering	1,755.12	1,975.64	1,792.40	1,912.64	1,367.07	1,367.07	1,443.37	1,307.20	816.00	16,429.30
> Asset Management	60.00	15.00	10.00	0.00	0.00	0.00	0.00	0.00	0.00	85.00
> BICOE	23.52	24.64	22.40	24.08	0.00	0.00	0.00	0.00	0.00	94.64
> Business Relationship Owner	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Business Systems Analysts	546.00	660.00	600.00	645.00	280.00	280.00	214.00	172.00	80.00	3,741.00
> Configuration Management	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

	Nov 2020 HOURS
> John McPherson	46,999.19
> Aaron Gresko	117.60
> Adalicia Aleman	0.00
> Adam Johnson	0.00
> Adam Kay	0.00

Team Member Project Allocations

Review your Team's Allocations:

1. Select the drop down arrow in the front of each person's name to view each resource's projects to which they are assigned and their allocations.
2. If you see any concerns or have any questions with allocations or missing projects for your team, please reach out to the project manager to remediate.



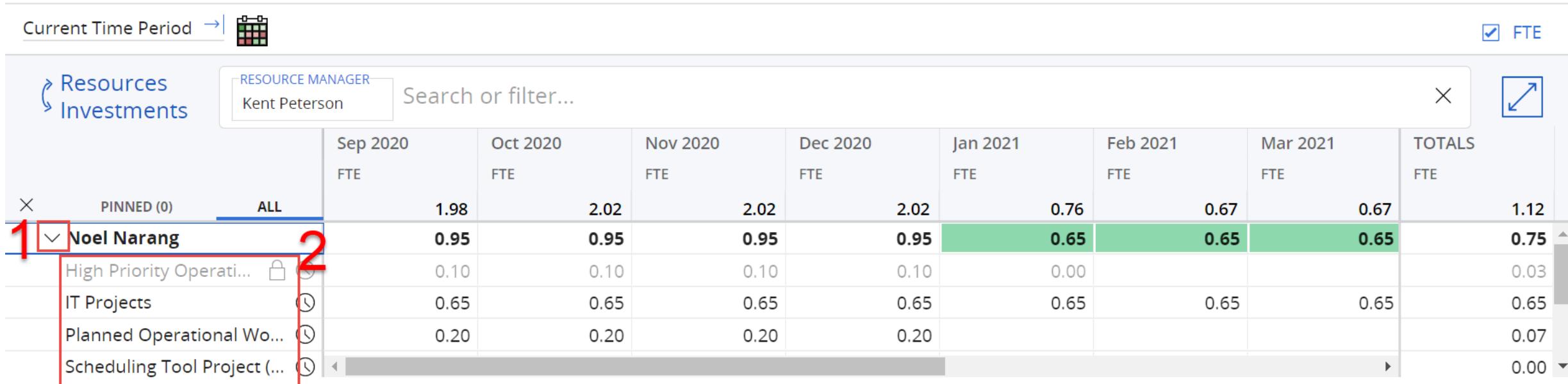
The screenshot shows the Clarity software interface for managing team member project allocations. The top navigation bar includes 'clarity', a bell icon, a green circular badge with 'PR', and 'Hi, PPM'. The left sidebar has icons for Home, Resources, Investments, and a list of team members. The main area displays a grid of hours worked by team members across various projects. The grid has columns for Sep 2020, Oct 2020, Nov 2020, Dec 2020, Jan 2021, Feb 2021, Mar 2021, Apr 2021, May 2021, and Totals. The rows list team members: Adriana Velasquez, Andrew Rotzin, Annette Poleon, Beatriz Seiff, and Ben Rimmash. Each row shows the total hours worked for each month and the total for the year. The 'Pinned in' dropdown is set to 'All' for Adriana Velasquez, showing her detailed project allocations.

	Sep 2020	Oct 2020	Nov 2020	Dec 2020	Jan 2021	Feb 2021	Mar 2021	Apr 2021	May 2021	TOTALS
	HOURS									
Adriana Velasquez	42.00	69.00	184.00	191.00	144.00	144.00	165.60	154.80	117.58	1,211.98
DEV - iSeries Rehosting - ...	0.00	25.00	144.00	154.80	144.00	144.00	165.60	154.80	117.58	1,049.78
High Priority Operations...	8.40	8.80	8.00	8.60						33.80
Planned Operational Wo...	16.80	17.60	16.00	17.20						67.60
PM Methodology	16.80	17.60	16.00	10.40						60.80
> Andrew Rotzin	58.80	61.60	56.00	59.00	0.00	0.00	0.00	0.00	0.00	235.40
> Annette Poleon	184.80	193.60	176.00	189.20	48.00	48.00	55.20	51.60	48.00	1,100.00
> Beatriz Seiff	108.00	113.14	102.85	110.57	40.00	40.00	46.00	43.00	40.00	775.55
> Ben Rimmash										0.00

Team Member Operational Allocations

As you are reviewing each resource's project allocations, you can set their operational allocations directly in the Staffing page.

1. Select the drop down arrow next to the resource name for whom you want to review projects.
2. A list of projects will display underneath that resource's name.

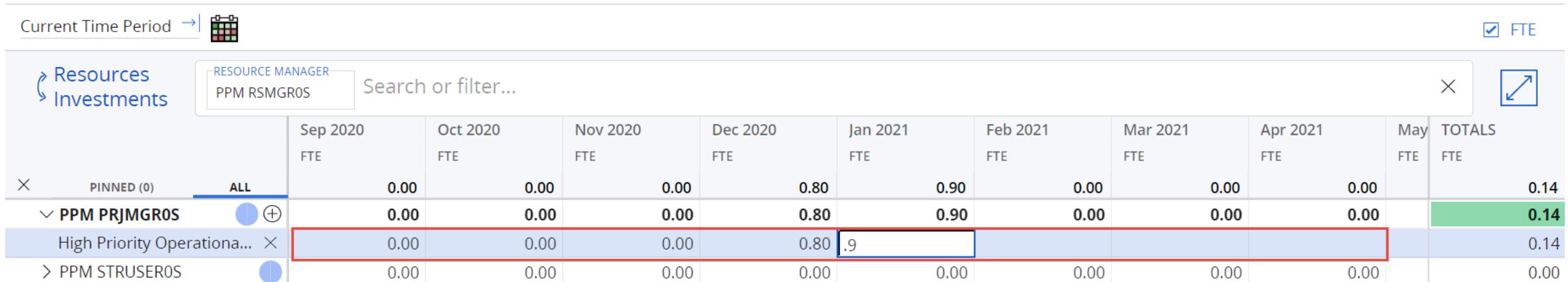


The screenshot shows the Microsoft Project Staffing page for a resource named Kent Peterson. The page includes a search bar, a calendar icon for the current time period, and a checkbox for FTE. The main table displays operational allocations for various resources over time. A specific row for Noel Narang is highlighted with a red box and a dropdown arrow, indicating where to click to view projects. The table shows data for Sep 2020 through Mar 2021, with a 'TOTALS' column at the end.

		Sep 2020	Oct 2020	Nov 2020	Dec 2020	Jan 2021	Feb 2021	Mar 2021	TOTALS	
		FTE	FTE							
X	PINNED (0)	ALL	1.98	2.02	2.02	2.02	0.76	0.67	0.67	1.12
1	Noel Narang	2	0.95	0.95	0.95	0.95	0.65	0.65	0.65	0.75
	High Priority Operati...	0.10	0.10	0.10	0.10	0.00			0.03	
	IT Projects	0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.65	
	Planned Operational Wo...	0.20	0.20	0.20	0.20				0.07	
	Scheduling Tool Project (...	0.00							0.00	

Team Member Operational Allocations

- Click on the field for the month you need to set the allocation and update using an in-line edit.
- Only edit operational projects for your team.
- For any project allocation updates, please reach out to the project manager.



Current Time Period →  FTE

Resources Investments   

X	PINNED (0)	ALL	Sep 2020	Oct 2020	Nov 2020	Dec 2020	Jan 2021	Feb 2021	Mar 2021	Apr 2021	May	TOTALS
			FTE	FTE	FTE							
✓	PPM PRJMGROS	 	0.00	0.00	0.00	0.80	0.90	0.00	0.00	0.00	0.00	0.14
✓	High Priority Operational...		0.00	0.00	0.00	0.80	0.90	0.00	0.00	0.00	0.00	0.14
➢	PPM STRUSEROS		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Part 8: Time Tracking and Approval



Timesheet Overview

- Clarity PPM's timesheet function is used to record actual hours spent on a task in a Project; as well as, non-project time (Other Work) such as operational, vacation, jury duty or medical leave.
- Time tracking provides data that drives project and portfolio reporting. It provides visibility into a project's progress and helps proactively identify risks.
- Timesheets are generated weekly, with the work week set for Sunday to Saturday.
- Once a time period is closed for time entry, it can only be reopened by the Clarity PPM Administrator.

Project vs. Non-Project Time

- **Report all project time** including hours worked in excess of your “regularly scheduled time” (typically 40 hours per week). Correctly reporting hours to the appropriate project tasks ensures that capital and expense are accurate on the company’s financial statements.
- **Report all non-project time:** Non-project hours include all ‘whirlwind’ non-project activities. Examples include time spent in non-project related department or staff meetings, Break-fix, PTO (Paid time-off) etc.

Time Entry Guidelines

- Create your timesheet at the beginning of each work week.
- Enter time each day to the correct project and task ensuring to also enter non-project time.
- Talk with the appropriate Project Manager(s) if tasks are not available on your timesheet. Also talk to your Manager regarding non-project work items.
- Key time in increments of 15 minutes (.25 hour). 30 minutes is entered as .5 hour.
- Save your time each day and submit for approval at the end of the work week.

Time Entry Guidelines

- Timesheets submissions are due on Friday at 5 PM.
- Timesheet approvals are due Monday at 4 PM.
- Timesheets must be in Approved status in order to post to the appropriate projects and Other Work categories in Clarity PPM.

Time Entry Guidelines

- Timesheets are posted on Monday evenings.
- Timesheets are closed two weeks following the initial posting.
- Closed timesheets cannot be changed or edited in any way.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					Time Trackers Submit Timesheets	
	RM Approve Timesheets					
	Time Period Closed					
		No Editing After Time Periods Close				

Time Entry Reminders

- Resource Reminders:
 - 5 PM Friday if the timesheet has not been submitted.
 - 9 AM Monday if the timesheet has not been submitted.
- Manager Reminders:
 - 9 AM Monday Summary of resources that have not submitted timesheets.
 - 4 PM Monday if timesheets have not been approved.
 - Optional: Every time one of your resources submits a timesheet.

Time Entry Reminders

Reminders for timesheets up to two weeks past due:

- **Resource Reminders:**

- 1 week past due
 - 1st Reminder – 9 AM Monday: Sent to Resource (copy Booking Manager and Portfolio Manager)
 - 2nd Reminder – 9 AM Wednesday: Sent to Resource (copy Booking Manager and Portfolio Manager)
 - 3rd Reminder – 9 AM Friday: Sent to Booking Manager (copy Booking Manager's Director, Portfolio Manager and Resource)
- 2 weeks past due
 - Final Reminder – 9 AM Monday: Sent to Booking Manager's Director (copy Booking Manager, Portfolio Manager)

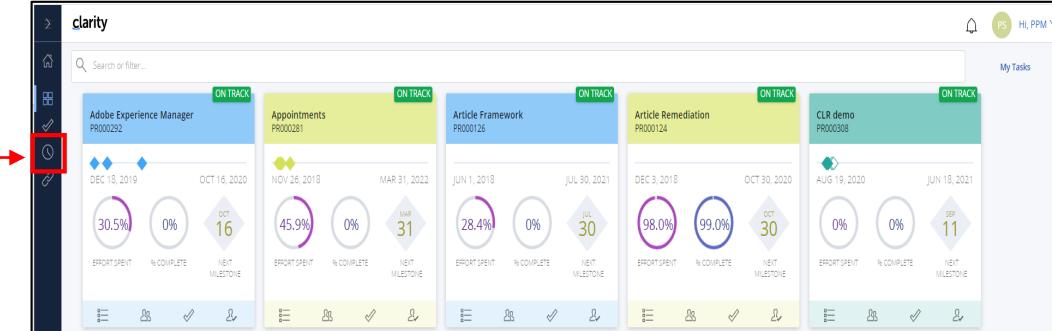
- **Manager Reminders:**

- 1 week past due
 - 1st Reminder – 9 AM Monday: Sent to Booking Manager (copy Portfolio Manager)
 - 2nd Reminder – 9 AM Wednesday: Sent to Booking Manager (copy Portfolio Manager)
 - 3rd Reminder – 9 AM Friday: Sent to Booking Manager (copy Booking Manager's Director, Portfolio Manager)
 - Optional: Every time one of your resources submits a timesheet.
- 2 weeks past due
 - Final Reminder – 9 AM Monday: Sent to Booking Manager's Director (Copy Booking Manager, Portfolio Manager)

Accessing and Creating Timesheets

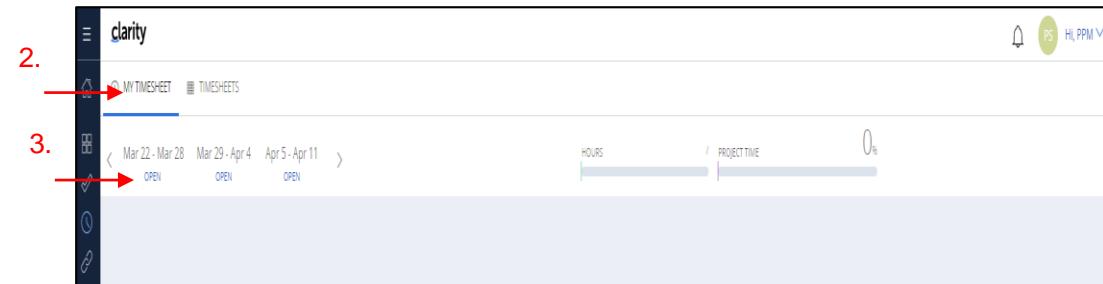
Creating Timesheets

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



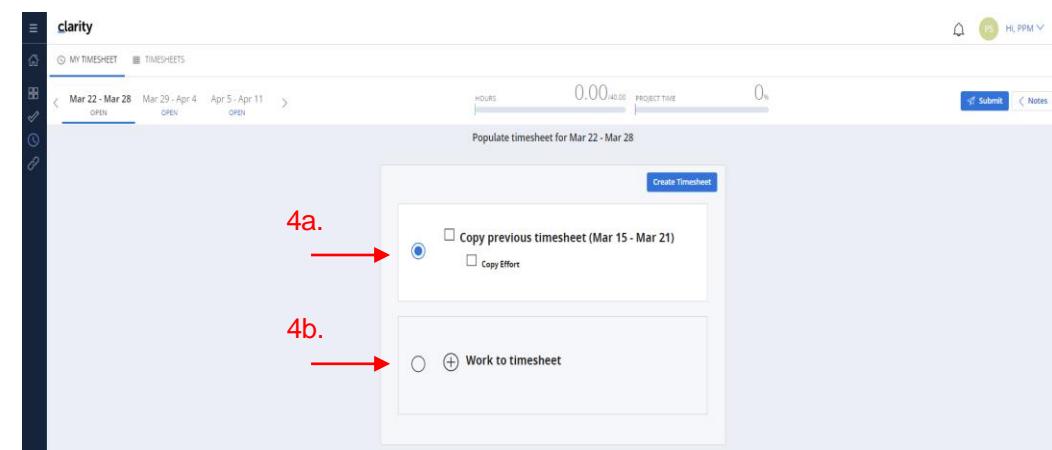
2. The Current Timesheet page will open.

3. Click on  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”.



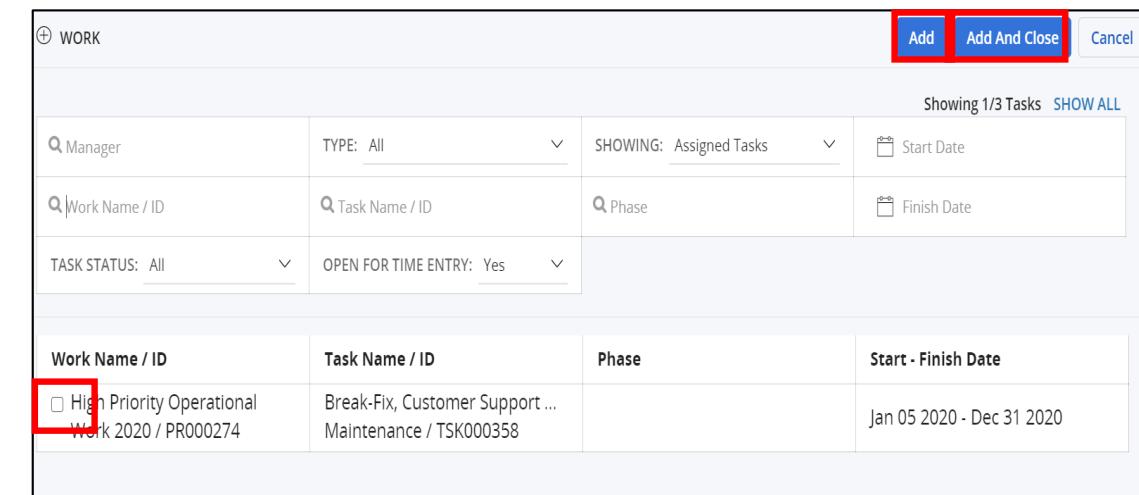
Adding Project Tasks to Timesheets

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.

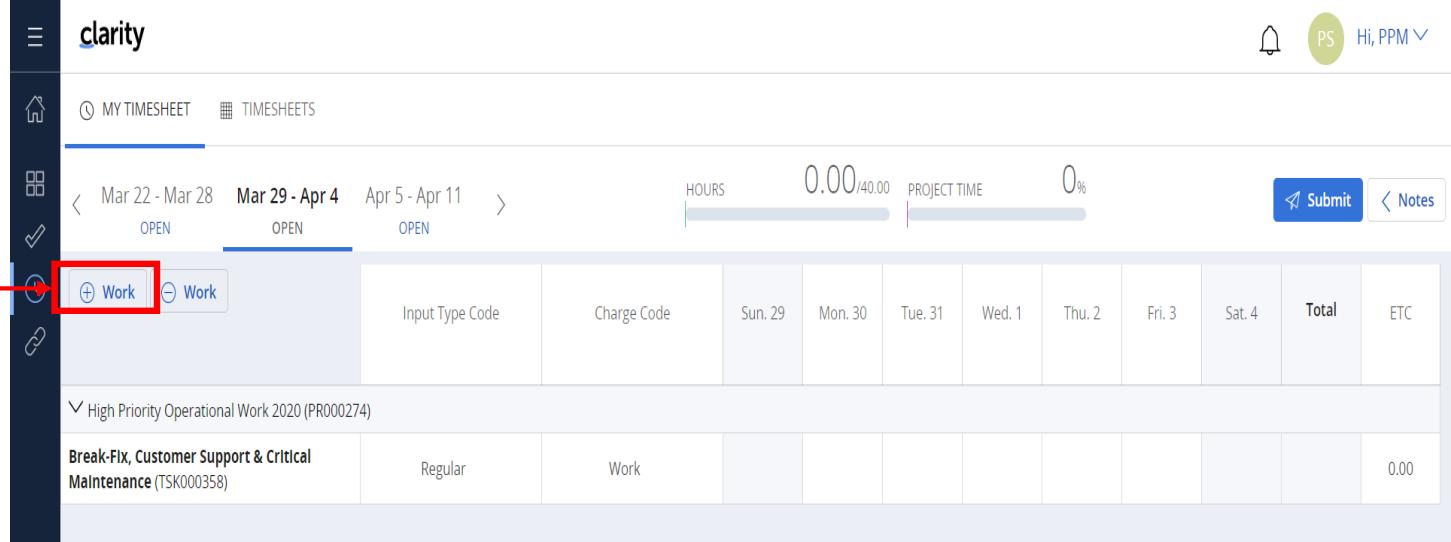


WORK			
Showing 1/3 Tasks SHOW ALL			
Manager	TYPE: All	SHOWING: Assigned Tasks	Start Date
Work Name / ID	Task Name / ID	Phase	Finish Date
TASK STATUS: All	OPEN FOR TIME ENTRY: Yes		
<input type="checkbox"/> High Priority Operational Work 2020 / PR000274	Break-Fix, Customer Support ... Maintenance / TSK000358		Jan 05 2020 - Dec 31 2020

Add more Tasks Individually

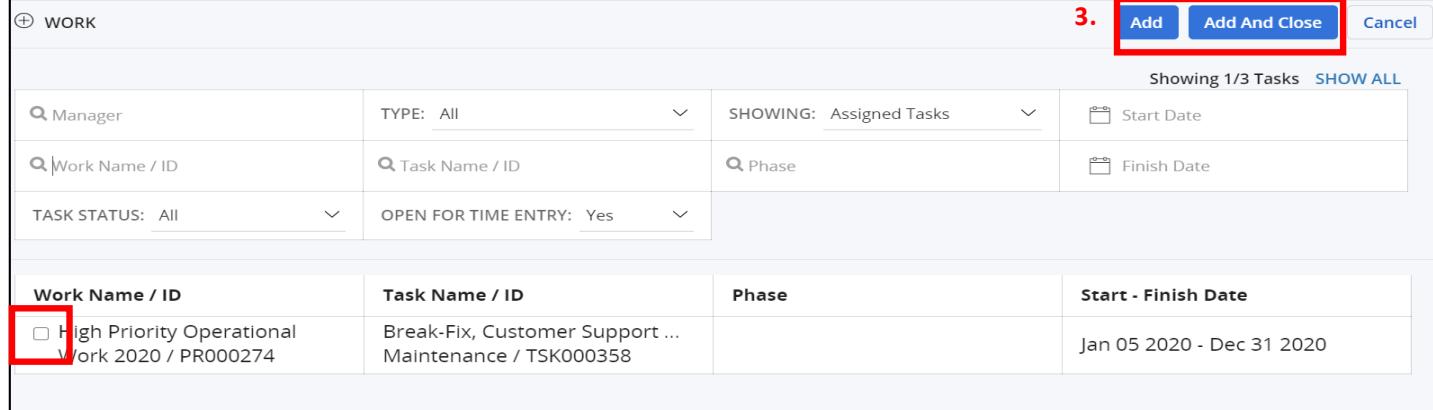
To add more tasks to the Timesheet, click **+ Work** to open the task/filter page (see slide 75: 4b. "Work in timesheet")

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



The screenshot shows the clarity software interface. The top navigation bar includes a bell icon, a user profile (PS), and a 'Hi, PPM' message. The main menu on the left has options like Home, Timesheets, and Work. The 'MY TIMESHEET' tab is selected. The main content area shows a date range from Mar 22 to Mar 28, with 'OPEN' status. A progress bar shows '0.00 / 40.00' hours and '0%' project time. A 'Submit' button is in the top right. A red box highlights the '+ Work' button in the top left of the main content area. Below it, a task list shows 'High Priority Operational Work 2020 (PR000274)' and 'Break-Fix, Customer Support & Critical Maintenance (TSK000358)'. The bottom part of the screenshot shows a detailed view of the task selection process.

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

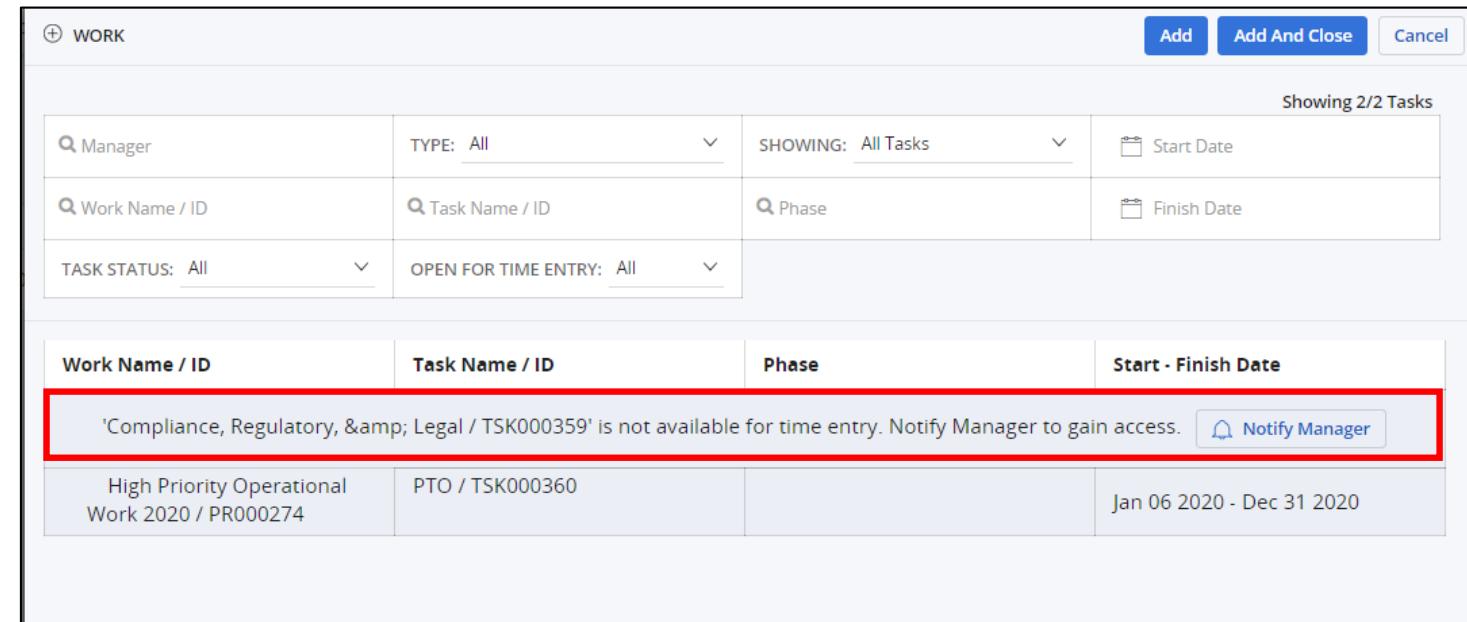


The screenshot shows a 'WORK' filter dialog box. The top right has buttons for 'Add', 'Add And Close', and 'Cancel'. It includes search fields for Manager, Work Name / ID, Task Name / ID, Phase, Start Date, and Finish Date. Filters for Task Status (All) and Open for Time Entry (Yes) are present. The results table shows a task: 'High Priority Operational Work 2020 / PR000274' with 'Break-Fix, Customer Support ... Maintenance / TSK000358'. A red box highlights the checkbox next to the task name in the results table.

Add more Tasks Individually

NOTE:

If a task has not been assigned to you, you can search for it, but may see a message with the Task name & task number followed by “is not available for time entry. Notify Manager to gain access.”. If you see this click on the provided button to request access.



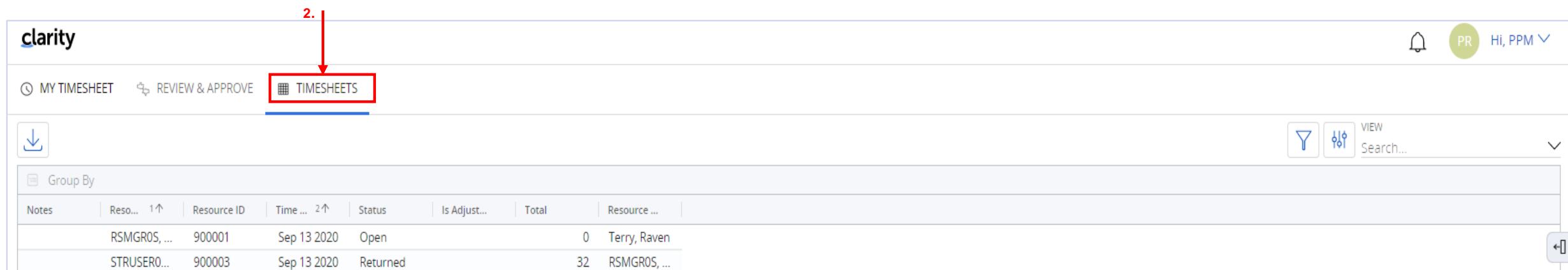
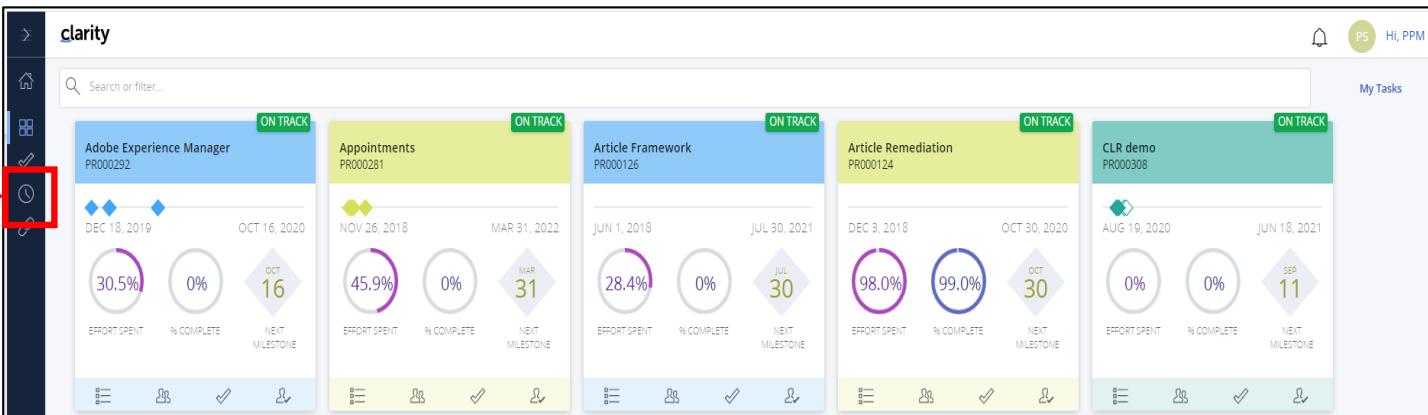
WORK

Showing 2/2 Tasks

Manager	Type: All	Showing: All Tasks	Start Date
Work Name / ID	Task Name / ID	Phase	Finish Date
Task Status: All	Open for Time Entry: All		
High Priority Operational Work 2020 / PR000274	PTO / TSK000360		Jan 06 2020 - Dec 31 2020
'Compliance, Regulatory, & Legal / TSK000359' is not available for time entry. Notify Manager to gain access. Notify Manager			

View All Available Timesheets

1. From the Home page, click the timesheet (clock) icon  on the left navigation panel.
2. Click the Timesheets tab at the top of the page to **view** timesheets from all open time periods.



Notes	Reso...	1↑	Resource ID	Time ...	2↑	Status	Is Adjust...	Total	Resource ...
RSMGROS, ...	900001		Sep 13 2020	Open		0	Terry, Raven		
STRUSERO...	900003		Sep 13 2020	Returned		32	RSMGROS, ...		

Timesheet Statuses

- **Open:** Timesheet has been created or entered but not yet submitted by the resource. *Open status also includes Returned timesheets.* Until the timesheet is approved, the time entry resource can edit the timesheet.
- **Submitted:** Timesheet submitted and ready for approval.
- **Approved:** Timesheet approved and ready to be posted.
- **Posted:** Timesheet posted via financial posting process and hours become actual effort on projects.
- **Returned:** Timesheet posted but rejected by approver and returned back to Resource for revisions (also considered to be “Open”).

Entering and Submitting Time

- ✓ Entering Time
- ✓ Deleting a Task
- ✓ Using Timesheet Notes
- ✓ Submit for Approval

Entering Time

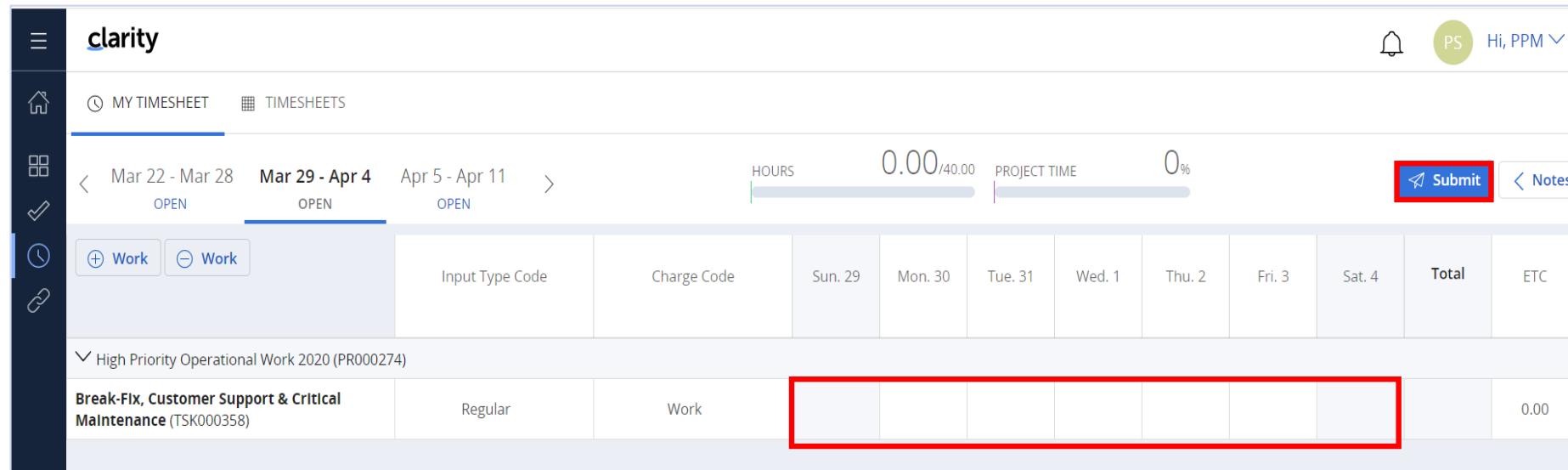
1. The timesheet has a cell for each task under each day of the week. **Enter hours under each day for all of the projects you worked on that day.**
2. Click **Submit** to record the hours to your timesheet.
3. Click **Cancel** to exit.

The screenshot shows the clarity software interface for managing timesheets. The top navigation bar includes 'clarity', a bell icon, and a greeting 'Hi, PPM'. The main menu bar has 'MY TIMESHEET' (selected) and 'TIMESHEETS'. Below this, a date range selector shows 'Mar 22 - Mar 28 OPEN', 'Mar 29 - Apr 4 OPEN' (selected), and 'Apr 5 - Apr 11 OPEN'. The main workspace displays a grid for entering time. The first row of the grid is highlighted with a red box and labeled '1.' in red. The grid columns include 'Input Type Code', 'Charge Code', and days from 'Sun. 29' to 'Sat. 4', followed by 'Total' and 'ETC'. At the bottom, a task list shows 'High Priority Operational Work 2020 (PR000274)' and 'Break-Fix, Customer Support & Critical Maintenance (TSK000358)'. The bottom navigation bar includes 'Regular' and 'Work' buttons.

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 auto-approval.



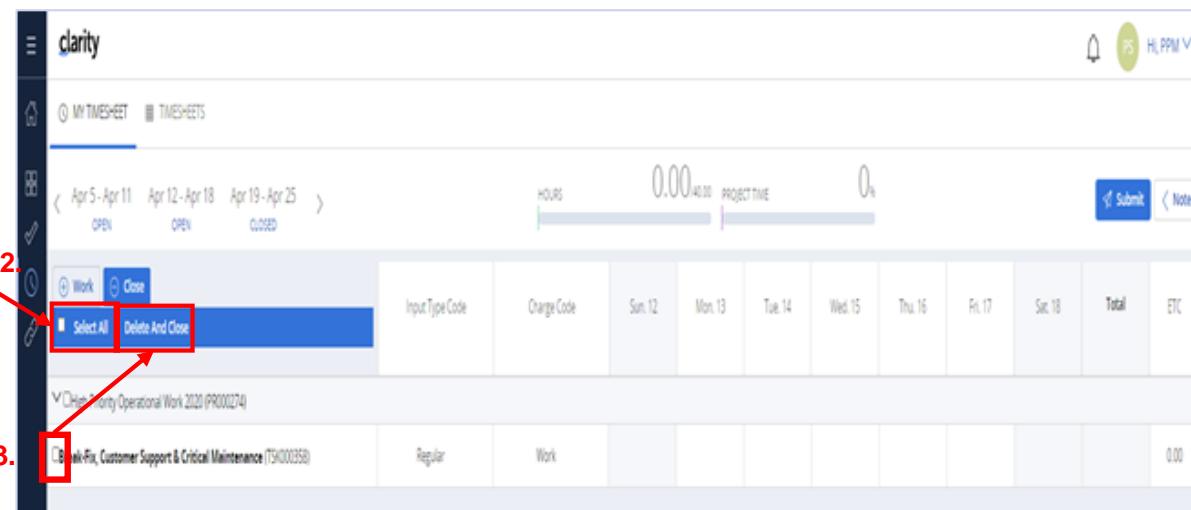
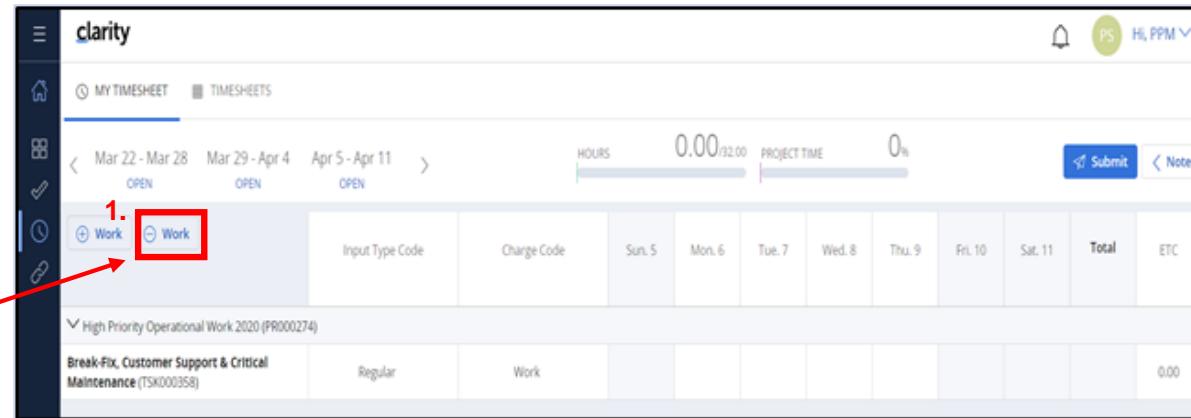
The screenshot shows a timesheet interface for the 'clarity' project. The top navigation bar includes 'MY TIMESHEET' (selected), 'TIMESHEETS', a user profile for 'PS', and a 'Submit' button. The main area displays three time periods: 'Mar 22 - Mar 28' (OPEN), 'Mar 29 - Apr 4' (selected), and 'Apr 5 - Apr 11' (OPEN). The 'Mar 29 - Apr 4' period is highlighted with a blue bar. Below this, a table shows a task: 'Break-Fix, Customer Support & Critical Maintenance (TSK000358)'. The table columns include 'Input Type Code', 'Charge Code', and dates from 'Sun. 29' to 'Sat. 4'. The 'Work' column for each day is empty, except for the last day which shows '0.00'. A red box highlights the 'Work' column for the days from Sunday to Saturday. The 'Total' column shows '0.00'.

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.

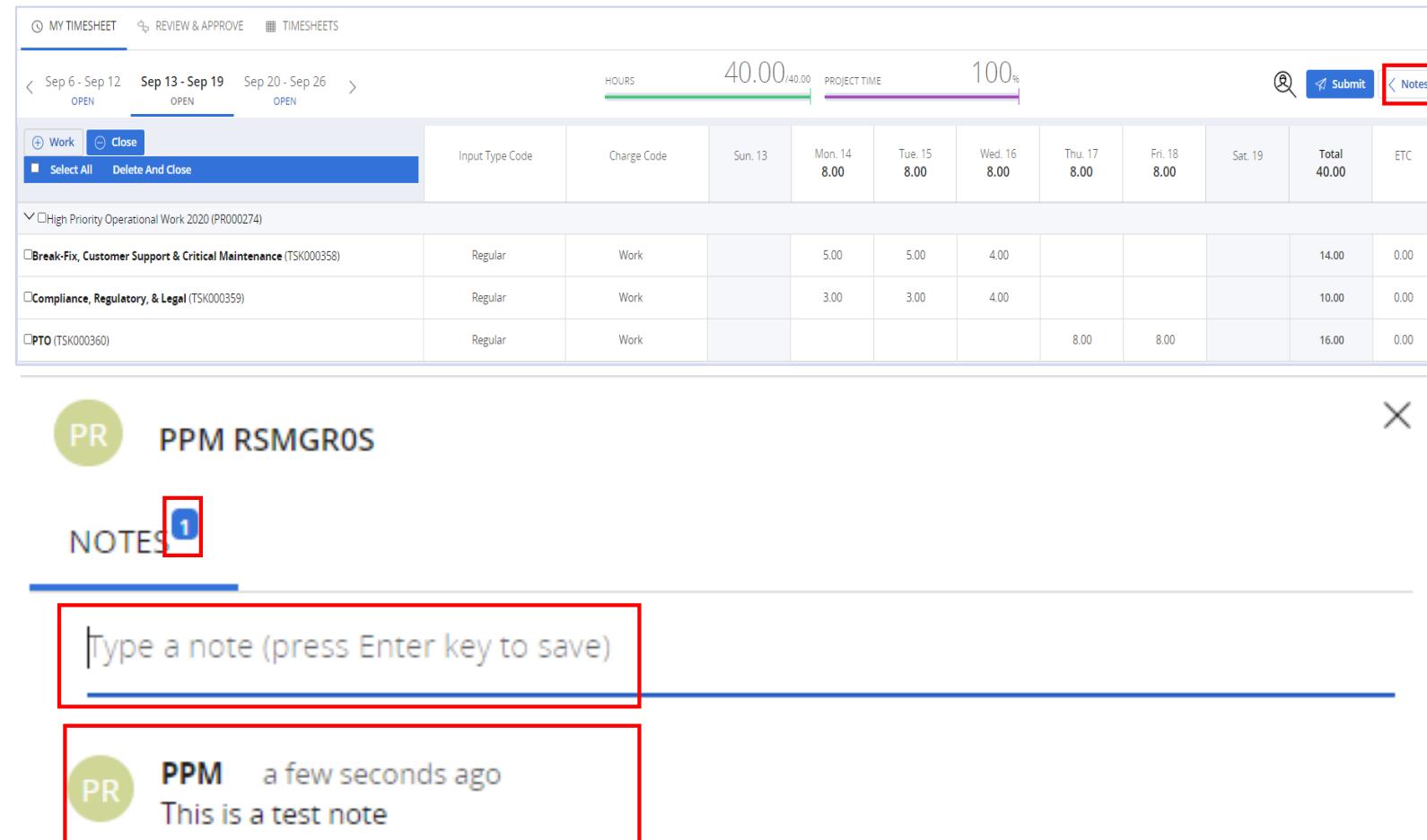
- To delete a task from the timesheet:

- Click on the “Delete work” icon.
- Click on the Select All icon Select All 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 **Delete And Close** which will delete the selected tasks from the time sheet and close the “Delete work” box.



Using Timesheet Notes

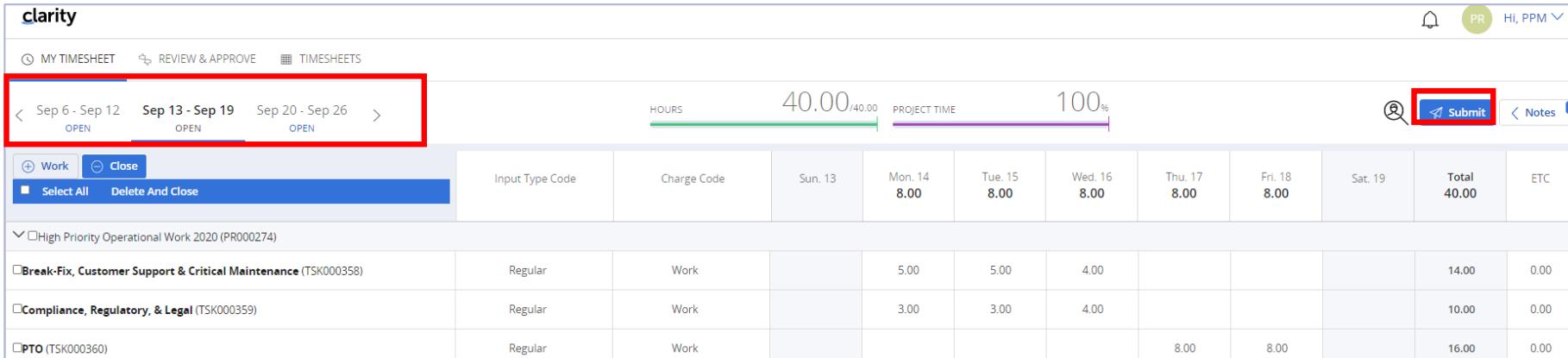
- *Timesheet Notes* are generated by clicking on the Notes icon in the top right corner of the timesheet.
- Enter the **text of the note** in the **Note field**.
- Clarity PPM will show the number of notes for the timesheet and show all notes below the freeform text box.
- Click  to close the notes box



The screenshot shows the Clarity PPM 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 the 'Notes' button 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' entry has a 'Select All' checkbox and a 'Delete And Close' button. The 'Break-Fix, Customer Support & Critical Maintenance' entry is expanded, showing details for each day of the week. Below the table, a 'NOTES' section is visible. It contains a green circular icon with 'PR' and a red box around the number '1' in a red-bordered box. A text input field says 'Type a note (press Enter key to save)'. Below it, a box contains a previous note: 'PPM a few seconds ago' followed by 'This is a test note'.

Submit for Approval

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



The screenshot shows the clarity software interface for managing timesheets. At the top, there are navigation links: 'MY TIMESHEET', 'REVIEW & APPROVE', and 'TIMESHEETS'. The current period is 'Sep 6 - Sep 12 OPEN', which is highlighted with a red box. Below this, there are buttons for 'Work' (with a plus sign) and 'Close' (with a minus sign), and a 'Select All' checkbox. A 'Delete And Close' button is also visible. To the right, there are sections for 'HOURS' (40.00/40.00), 'PROJECT TIME' (100%), and a 'Submit' button, which is also highlighted with a red box. Below these sections, there is a table with columns for 'Input Type Code', 'Charge Code', and dates from 'Sun. 13' to 'Sat. 19'. The table shows time entries for various projects: 'High Priority Operational Work 2020 (PR000274)', 'Break-Fix, Customer Support & Critical Maintenance (TSK000358)', 'Compliance, Regulatory, & Legal (TSK000359)', and 'PTO (TSK000360)'. The total for the week is 40.00 hours.

Input Type Code	Charge Code	Sun. 13	Mon. 14 8.00	Tue. 15 8.00	Wed. 16 8.00	Thu. 17 8.00	Fri. 18 8.00	Sat. 19	Total 40.00	ETC
High Priority Operational Work 2020 (PR000274)	Regular	Work	5.00	5.00	4.00				14.00	0.00
Break-Fix, Customer Support & Critical Maintenance (TSK000358)	Regular	Work	3.00	3.00	4.00				10.00	0.00
Compliance, Regulatory, & Legal (TSK000359)	Regular	Work				8.00	8.00		16.00	0.00
PTO (TSK000360)	Regular	Work								

Timesheet Adjustments

- ✓ Overview of Adjustments
- ✓ How to Adjust your Timesheet
- ✓ How to return your team's timesheets

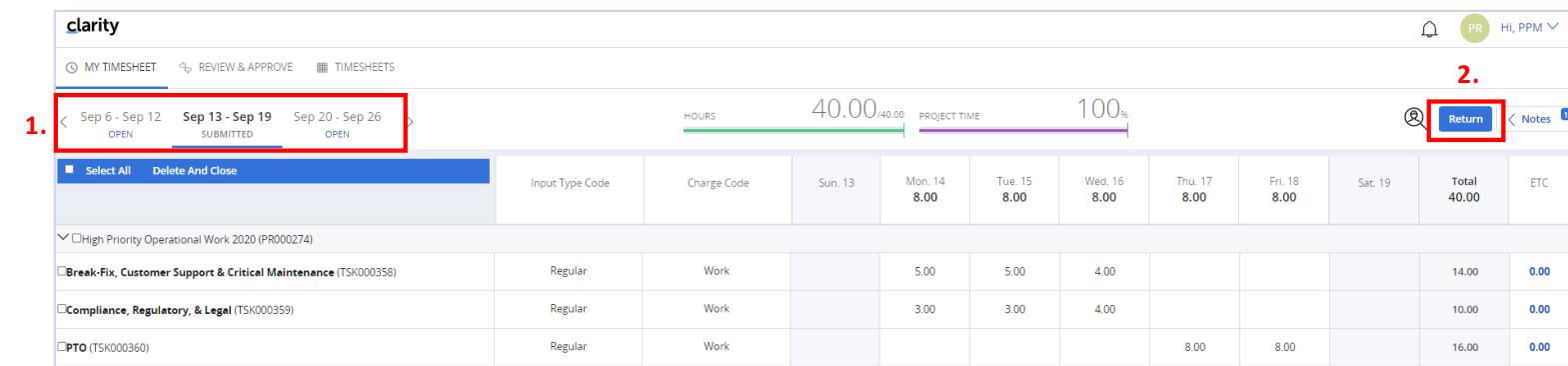
Timesheet Adjustment Overview

- 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:

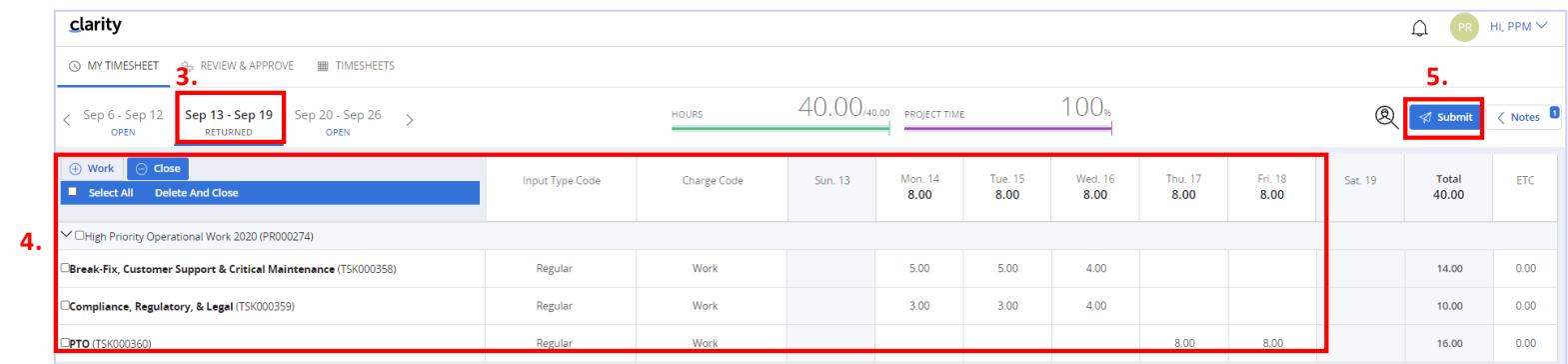
1. Click on the appropriate timesheet in the list to be Returned.
2. Click **Return** on the opened Timesheet.



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

2. Return

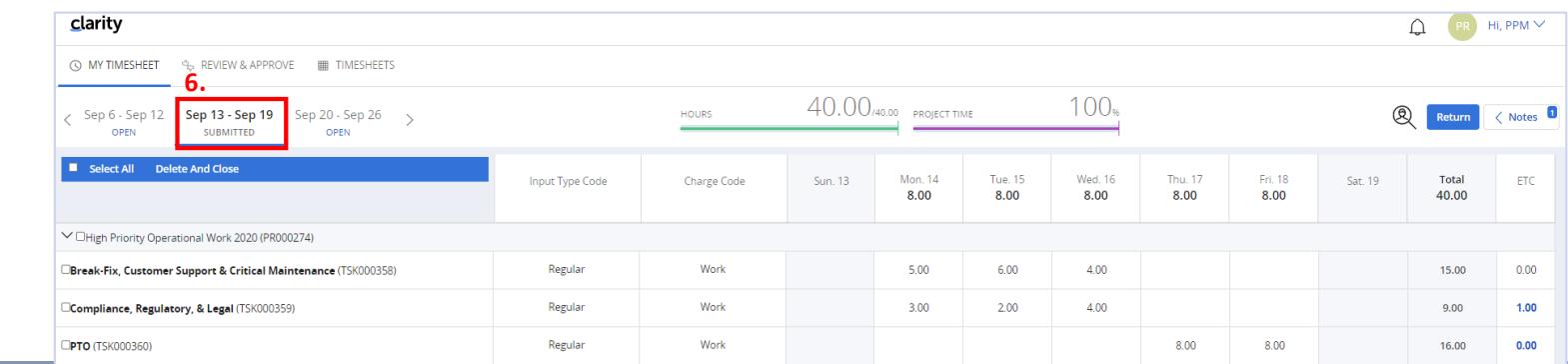
3. Status will change to **Returned**.
4. Make adjustments to hours/tasks as needed.
5. Click **Submit** for auto-approval.



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

5. Submit

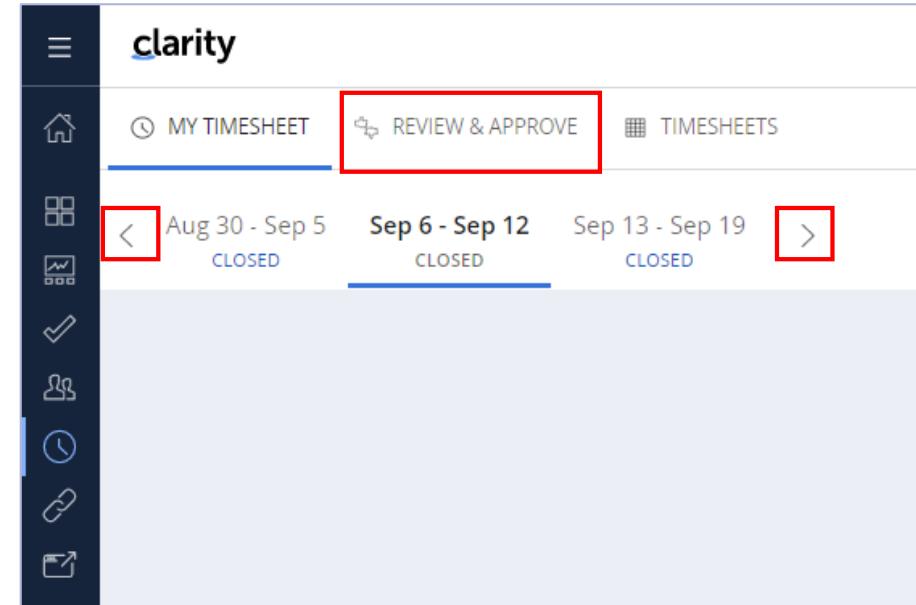
6. Status will change back to Submitted.



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

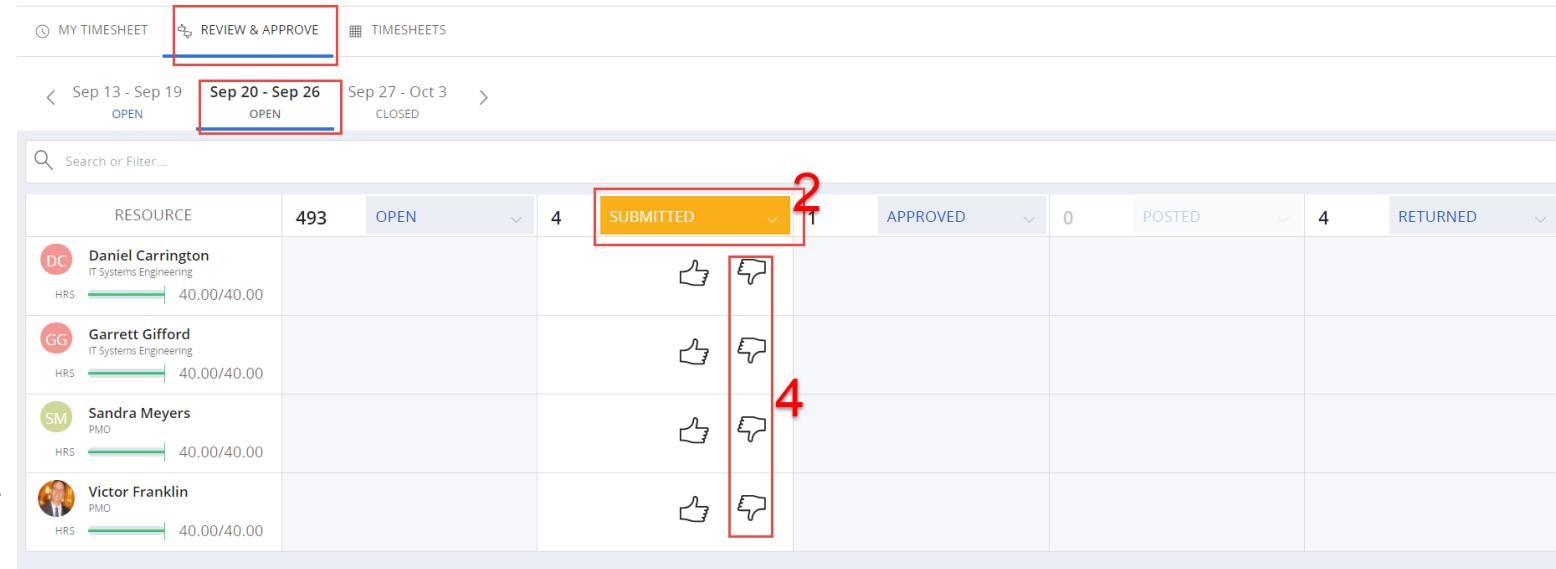
Returning a Timesheet to a Resource

1. Select the **Review & Approve tab** at the top of the page. Click on the **Time period** to be reviewed. NOTE: You may need to use the Left/Right arrows to scroll to the Time Period you want to review.



Returning a Timesheet to a Resource

2. To Review the Submitted timesheets, click on the Submitted column header



The screenshot shows a software interface for managing timesheets. At the top, there are navigation tabs: 'MY TIMESHEET', 'REVIEW & APPROVE' (which is highlighted with a red box and a red number '2' above it), and 'TIMESHEETS'. Below the tabs is a date range selector with three options: 'Sep 13 - Sep 19 OPEN', 'Sep 20 - Sep 26 OPEN' (which is highlighted with a red box and a red number '1' above it), and 'Sep 27 - Oct 3 CLOSED'. A search bar labeled 'Search or Filter...' is positioned below the date range. The main area is a table with columns: 'RESOURCE', '493', 'OPEN', '4', 'SUBMITTED' (which is highlighted with a red box and a red number '2' above it), 'APPROVED', '0', 'POSTED', '4', and 'RETURNED'. The 'SUBMITTED' column contains four entries, each with a 'Return' icon (a thumbs-down icon inside a red box) and a red number '4' to its right. The entries are: 1. Daniel Carrington (IT Systems Engineering) with 40.00/40.00 hours. 2. Garrett Gifford (IT Systems Engineering) with 40.00/40.00 hours. 3. Sandra Meyers (PMO) with 40.00/40.00 hours. 4. Victor Franklin (PMO) with 40.00/40.00 hours.

3. This will give you a list of Resources that have submitted their timesheets.



4. From here you can determine to “Return” an individual timesheet by clicking on the Thumbs-down (Return) icon for that resource.

Returning a Timesheet to a Resource

5. If you would like to add a Note, click the resource's name and a dialog window will appear on the right-hand side

6. Click on the Notes tab and enter in any comments or reasons as to why the timesheet has been returned and press the Enter key

The screenshot shows a software interface for managing timesheets. At the top, there are three tabs: 'MY TIMESHEET', 'REVIEW & APPROVE' (which is selected), and 'TIMESHEETS'. Below the tabs, there are three date ranges: 'Sep 13 - Sep 19' (OPEN), 'Sep 20 - Sep 26' (OPEN), and 'Sep 27 - Oct 3' (CLOSED). The 'Sep 20 - Sep 26' range is highlighted with a blue border.

The main area displays a table of timesheets. The columns are: RESOURCE, COUNT (493), STATUS (OPEN), SUBMITTED (3), APPROVED (1), and APPROVED BY. The first row shows a timesheet for 'Garrett Gifford' (IT Systems Engineering). A red arrow labeled '5' points to the 'Garrett Gifford' link. The row for 'Garrett Gifford' also includes a 'HRS' column showing '40.00/40.00'.

On the right side, a detailed view of Garrett Gifford's timesheet is shown. It includes a profile picture, name ('Garrett Gifford'), department ('IT Systems Engineering'), and a progress bar for 'HRS' showing '40.00/40.00'. Below this, there are tabs for 'TIMESHEET' (selected) and 'NOTES'. A red box labeled '6' highlights the 'NOTES' tab. A text input field with the placeholder 'Type a note (press Enter key to save)' is also visible.

Part 9: Summary



Resource Management Roles & Responsibilities

Resource Manager (RM)

- Approve timesheets
- Ensure timesheets are submitted on time
- Ensure resources are updating their Resource Calendar
- Monitor Resource Allocations as needed
- Communicate resource risks and issues to PMs & Leadership
- Work with Project Manager to resolve resource work conflicts

Project Manager (PM)

- Ensure Resource Allocations are sufficient to meet Project Demand
- Communicate resource issues to the Resource Manager & Leadership
- Add resource / team member to project and enter allocation

Team Member (TM)

- Enter timesheets weekly
- Update ETCs via timesheets as necessary
- Maintain non-working days in personal calendar