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SAN DIEGO • 2023

# Best Practice Use of Clarity for Resource Management

**Your Guides:**

Karen Lifsey and Michelle Merriam-Day

# Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



# Agenda

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- Overview
- Fundamentals
- Best Practices

# Overview

- What is Resource Management?

- Capturing data to understand WHO is or will be working on WHAT and WHEN
- Understanding capacity and demand gaps to take action
- Resource Management can also incorporate a business process to create and fulfill Staffing Requests

Capacity vs. Demand by Role		Allocation by Month (Hours)												
Role		Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Total
Architect	Capacity	1,512.00	1,584.00	1,584.00	1,512.00	1,656.00	1,512.00	1,512.00	1,584.00	1,656.00	1,440.00	1,656.00	1,584.00	18,792.00
	Demand	1,718.58	1,757.29	1,581.29	1,805.35	2,635.25	2,428.01	2,428.01	2,274.67	2,217.65	1,928.39	2,033.65	1,945.23	24,753.39
	Remaining Capacity	-206.58	-173.29	2.71	-293.35	-979.25	-916.01	-916.01	-690.67	-561.65	-488.39	-377.65	-361.23	-5,961.39
Business Analyst	Capacity	924.00	968.00	968.00	924.00	1,012.00	924.00	924.00	968.00	1,012.00	880.00	1,012.00	968.00	11,484.00
	Demand	1,554.00	1,552.00	1,496.00	1,428.00	1,368.00	1,176.00	1,000.00	639.60	552.00	480.00	552.00	528.00	12,325.60
	Remaining Capacity	-630.00	-584.00	-528.00	-504.00	-356.00	-252.00	-76.00	328.40	460.00	400.00	460.00	440.00	-841.60
Business Architect	Capacity	168.00	176.00	176.00	168.00	184.00	168.00	168.00	176.00	184.00	160.00	184.00	176.00	2,088.00
	Demand	436.80	281.60	281.60	193.20	211.60	193.20	193.20	202.40	211.60	184.00	155.60	26.40	2,571.20
	Remaining Capacity	-268.80	-105.60	-105.60	-25.20	-27.60	-25.20	-25.20	-26.40	-27.60	-24.00	28.40	149.60	-483.20
Champion	Capacity	168.00	176.00	176.00	168.00	184.00	168.00	168.00	176.00	184.00	160.00	184.00	176.00	2,088.00
	Demand	1,512.00	1,584.00	1,456.00	1,344.00	1,472.00	1,280.00	840.00	880.00	920.00	800.00	920.00	880.00	13,888.00
	Remaining Capacity	-1,344.00	-1,408.00	-1,280.00	-1,176.00	-1,288.00	-1,112.00	-672.00	-704.00	-736.00	-640.00	-736.00	-704.00	-11,800.00
DBA	Capacity	840.00	880.00	880.00	840.00	920.00	840.00	840.00	880.00	920.00	800.00	920.00	880.00	10,440.00
	Demand	420.00	264.00	264.00	252.00	184.00	168.00	168.00	176.00	184.00	160.00	184.00	176.00	2,600.00
	Remaining Capacity	420.00	616.00	616.00	588.00	736.00	672.00	672.00	704.00	736.00	640.00	736.00	704.00	7,840.00
Developer	Capacity	2,016.00	2,112.00	2,112.00	2,016.00	2,208.00	2,016.00	2,016.00	2,112.00	2,208.00	1,920.00	2,208.00	2,112.00	25,056.00
	Demand	2,097.60	1,830.40	1,830.40	1,747.20	1,809.60	1,579.20	1,447.20	1,390.40	1,453.60	1,264.00	1,453.60	1,390.40	19,293.60
	Remaining Capacity	-81.60	281.60	281.60	268.80	398.40	436.80	568.80	721.60	754.40	656.00	754.40	721.60	5,762.40

# Some Rego Thoughts...

## What is Success

- Effective business processes exist to use the data for decisions
  - Proper prioritization and pacing of new projects
  - Fewer schedule delays waiting for resources
  - Identify and escalate resource risks to delivery
  - Understand the impacts of change
- Data is Comprehensive, Reliable, Timely & Directionally Accurate

## Stumbling Blocks

- Finding the right level of granularity
- Enterprise decisions require comprehensive data
- Difficulty updating allocations
- Effective OCM
- Reporting goldilocks – nothing just right
- Effective communication between Resource, RM, PM
- Complexity, inconsistent process
- Management support

# Fundamentals



# Resource Management Building Blocks

## Understand Capacity

- Complete Resource Profile:
  - ✓ Primary Role
  - ✓ Availability
  - ✓ OBS
  - ✓ Calendar

## Track Demand

- Add Roles, Resources or Teams to Investments
- Replace Roles with named Resources on Investments
- Enter Allocations over time
- Optional: Manage Assignments and ETC

## Address Gaps

- Leverage OTB tools to understand and act on demand/capacity gaps over Time
- Balance Individual or Team workloads
- Address upcoming gaps through staffing or planning changes
- Assess ability to deliver when planning new work
- Assess impact of change

## Key Outputs

How many resources do we have?  
What is our capacity to do work?  
How are resources aligned within the organization?  
What is high level capacity by role?

When are people or groups available for work or overallocated?  
What percentage of time is planned for each investment type?

What is the most constrained Role?  
When will we have capacity to deliver new work?  
What needs to shift to address new priorities?

# Understanding Capacity

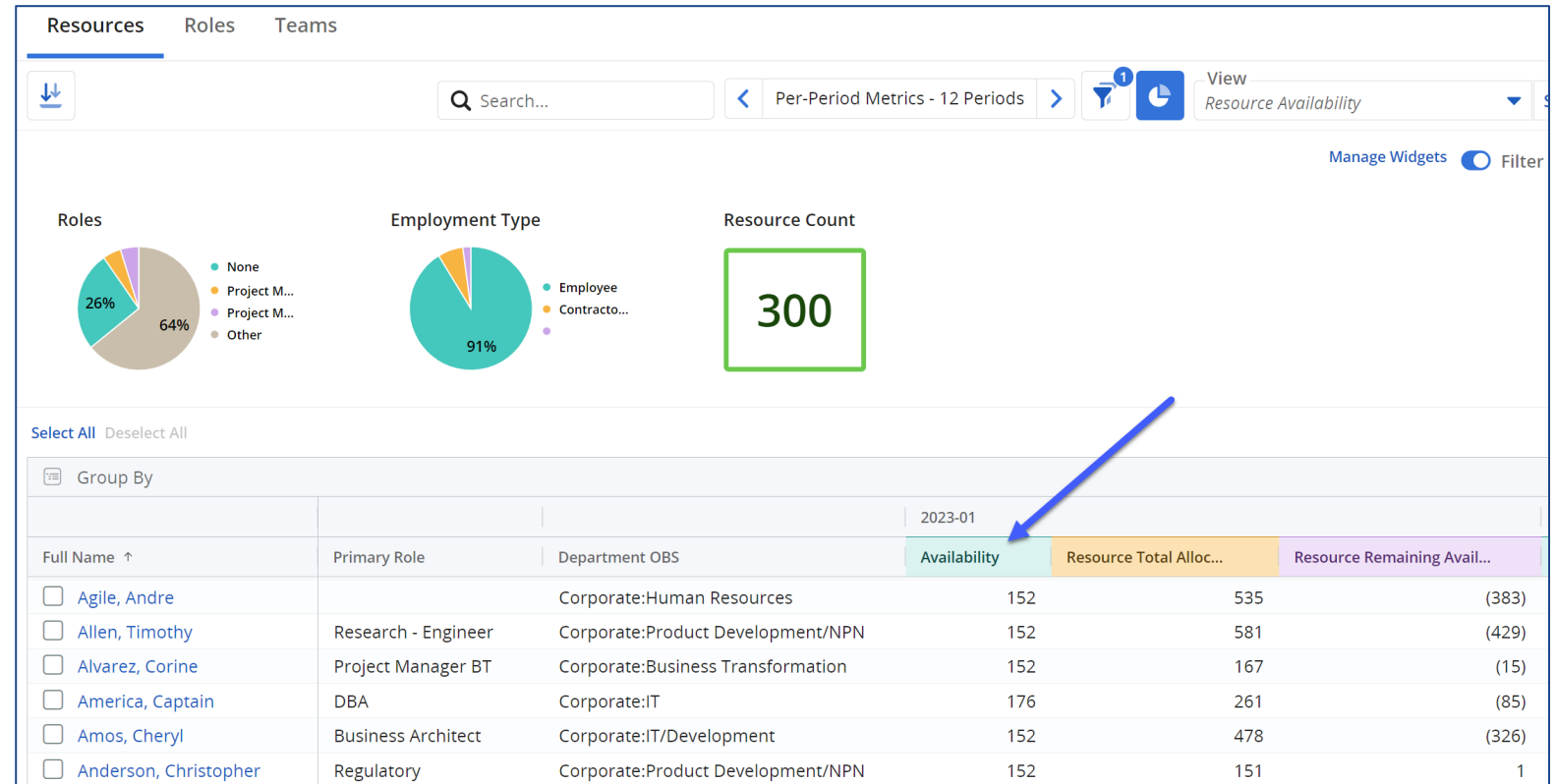
*How much work can we do in a month?*

## Resource Availability

*Availability in Hours / Day*

## Capacity

*Sum of Availability over Time*





# Understanding Demand

## Demand

*Hours needed for investments over time*

The screenshot shows a software interface for a project named 'AP Architecture Consolidation project' (PR1196), which is marked as 'On Track'. The interface includes a navigation bar with various tabs like Properties, Staff, Tasks, and Financials. Below the navigation bar, there is a table showing resource allocation over time. The table has columns for months from 2019-08 to 2019-11. The resources listed include 'AB Team' and various roles like Business Analyst, Network Engineer, Architect, Developer, Project Manager, Storage Architect, and Test Engineer. The 'AB Team' row shows a total allocation of 47,360 hours, with monthly allocations of 13,024, 12,432, 13,616, and 8,288 hours respectively. Individual roles also show their respective allocations and monthly breakdowns.

										2019-08	2019-09	2019-10	2019-11
*Resource ↑	Role	*Book...	Ope...	Start	Finish	Default Allo...	Allocation	Actuals	ETC	Allocation	Allocation	Allocation	Allocation
<input type="checkbox"/>	AB Team	Soft	✓			100%	47,360	0	6,400	13,024	12,432	13,616	8,288
<input type="checkbox"/>	Abbott, Karl	Business Analyst	Soft	✓		100%	640	0	640	176	168	184	112
<input type="checkbox"/>	Allen, Timothy	Network Engineer	Soft	✓		100%	640	0	240	176	168	184	112
<input type="checkbox"/>	Architect	Architect	Soft	✓		60%	384	0	160	106	101	110	67
<input type="checkbox"/>	Business Analyst	Business Analyst	Soft	✓		100%	640	0	280	176	168	184	112
<input type="checkbox"/>	Developer	Developer	Soft	✓		100%	640	0	640	176	168	184	112
<input type="checkbox"/>	Developer	Developer	Soft	✓		100%	640	0	320	176	168	184	112
<input type="checkbox"/>	Project Manager	Project Manager	Soft	✓		100%	640	0	280	176	168	184	112
<input type="checkbox"/>	Storage Architect	Storage Architect	Soft	✓		100%	640	0	160	176	168	184	112
<input type="checkbox"/>	Test Engineer	Test Engineer	Soft	✓		100%	640	0	160	176	168	184	112

Investments can include Project, Ideas, Custom Investments

# Putting it all together

## Clarity Staffing Page

*Align Demand and Capacity*

Staffing View (Copy) Architect Demand Save Manage Widgets Filter Widgets

Allocations Timeline Staff Grid

Allocations By Investment Columns

Match Filters All Any

- Is Role (Resource) = Yes Role Select Add Filter Remove All
- AND Active (Common Investment) = Yes Template (Common Investment) = No

Name	Staff/OPS Unit	Start	Finish	Allocation	Default All	2023-07	2023-08	2023-09	2023-10	2023-11	2023-12
A Template for Six Sigma Lean Projects			6/1/24	0.00							
▼ AARD Payments Modules 2023		4/15/19	5/26/25	44,888.67							
Business Analyst	Corporate Department ...	4/15/19	5/26/25	8,051.33		168.00	184.00	168.00	176.00	176.00	168.00
Business Analyst		4/15/19	5/26/25	12,731.33		0.00	0.00	0.00	0.00	0.00	0.00
Project Manager		4/15/19	5/26/25	8,023.33		168.00	184.00	168.00	176.00	176.00	168.00
Storage Architect		4/15/19	5/26/25	7,979.33		0.00	0.00	0.00	0.00	0.00	0.00

A project in need of a Business Analyst

Resources By Role Columns

Match Filters All Any

- Primary Role = Business Analyst Manager Select Add Filter Remove All

Full Name	Primary Role	Manager	Person Type	Date of Hire	Date o	2023-07	2023-08	2023-09	2023-10	2023-11	2023-12
Goldman, Mark	Business Analyst	Kumar, Arun	Contractor	1/1/01		168.00 / 168.00	184.00 / 184.00	168.00 / 168.00	176.00 / 176.00	176.00 / 176.00	168.00 / 168.00
Hayes, Todd	Business Analyst	Miller, Rosie	Employee	1/1/01		168.00 / 168.00	184.00 / 184.00	168.00 / 168.00	56.00 / 176.00	0.00 / 176.00	0.00 / 168.00
Kumar, Arun	Business Analyst	Kumar, Arun	Contractor	1/1/01		0.00 / 168.00	0.00 / 184.00	0.00 / 168.00	0.00 / 176.00	0.00 / 176.00	0.00 / 168.00
Olney, Pam	Business Analyst	Miller, Rosie	Employee	1/1/01		168.00 / 168.00	184.00 / 184.00	168.00 / 168.00	176.00 / 176.00	176.00 / 176.00	168.00 / 168.00

Looks like Arun has availability

# Understanding Capacity and Demand Gaps

Staffing

Allocations Timeline Staff Grid

Allocations By Resource Columns

Name	Role	Start	Finish	Allocation	Active	2023-08	2023-09	2023-10	2023-11	2023-12
Business Analyst						4,347.60	3,513.20	3,514.40	3,074.40	3,049.20
AARD Payments Modules 20...	Business ...	Apr 15, 2019	May 26, 2025	8,051.33	✓	0.00	0.00	0.00	0.00	0.00
AARD Payments Modules 20...	Business ...	Apr 15, 2019	May 26, 2025	12,731.33	✓	184.00	168.00	176.00	176.00	168.00
Apollo Product Launch	Business ...	May 10, 2019	Dec 31, 2023	3,379.60	✓	64.40	58.80	61.60	61.60	58.80
Application for Light Mgmt	Business ...	Apr 20, 2023	Sep 6, 2023	800.00	✓	184.00	32.00			
Aurora Project	Business ...	Nov 1, 2022	Feb 8, 2023	544.00	✓					
Automation & Robotics	Business ...	Jan 1, 2022	Mar 31, 2023	872.00	✓					

Resources By Role Columns

Full Name	Primary Role	Manager	Resource Remain...	2023-08	2023-09	2023-10	2023-11	2023-12	
Black Belt				0.00	920.00 / 920.00	1,008.00 / 840.00	1,144.00 / 880.00	880.00 / 880.00	840.00 / 840.00
Business Analyst				0.00	1,324.80 / 1,380.00	1,185.60 / 1,260.00	1,107.20 / 1,320.00	1,020.80 / 1,320.00	974.40 / 1,260.00
Evans, Nick	Business Analyst	Miller, Rosie	436.00	0.00 / 92.00	0.00 / 84.00	0.00 / 88.00	0.00 / 88.00	0.00 / 84.00	
Goldman, Mark	Business Analyst	Kumar, Arun	0.00	184.00 / 184.00	168.00 / 168.00	176.00 / 176.00	176.00 / 176.00	168.00 / 168.00	
Hayes, Todd	Business Analyst	Miller, Rosie	464.00	184.00 / 184.00	168.00 / 168.00	56.00 / 176.00	0.00 / 176.00	0.00 / 168.00	

## Planning and Monitoring

- Staffing Page
- Roadmap
- Hierarchy

Remaining Capacity by Month (Hours)													Total
	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	
	0.00	0.00	0.00	0.00	8.00	46.00	64.00	80.00	0.00	0.00	0.00	0.00	198.00
	0.00	0.00	0.00	20.00	8.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	148.00
	16.00	0.00	0.00	-45.31	-13.99	-28.00	0.00	0.00	0.00	0.00	0.00	0.00	-71.30
	0.00	0.00	0.00	-44.00	-68.00	-100.00	-40.00	-168.00	-76.00	-16.00	0.00	0.00	-512.00
	0.00	0.00	160.00	52.00	48.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	260.10
	0.00	0.00	0.00	-113.60	-56.80	-17.60	0.00	0.00	0.00	158.40	151.20	115.60	237.20
	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-40.00	0.00	0.00	0.00	0.00	-40.00
	0.00	0.00	0.00	0.00	0.00	0.00	0.00	140.00	125.00	27.00	28.00	16.00	336.00
	0.00	0.00	0.00	136.00	168.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	304.70
	0.00	0.00	0.00	0.00	0.00	-16.00	-18.00	-78.10	-176.00	-176.00	-168.00	-80.00	-712.10
	-8.00	-12.00	0.00	0.00	13.99	-21.00	-55.99	-2.10	22.00	8.00	113.99	104.00	162.89
	0.00	0.00	12.00	0.00	-168.00	-144.00	-196.00	-130.00	-176.00	0.00	0.00	0.00	-802.00
	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-17.00	-16.00	-80.60	-113.60
	0.00	0.00	-4.00	120.00	32.00	80.00	-102.00	-32.00	0.00	0.00	0.00	0.00	94.00
	0.00	0.00	-54.00	-100.00	-84.00	-56.00	-32.00	0.00	0.00	0.00	0.00	0.00	-326.00
	0.00	0.00	0.00	-76.00	-72.00	48.00	0.00	-22.00	0.00	0.00	0.00	0.00	-122.00
	0.00	0.00	0.00	0.00	0.00	0.00	-84.00	-168.00	-176.00	-100.88	-168.00	-80.00	-776.88
	0.00	0.00	0.00	108.91	72.40	27.00	65.01	2.10	22.00	0.00	43.99	0.00	341.41
	-4.00	-8.00	0.00	-140.00	-160.00	-120.00	-104.00	0.00	0.00	0.00	68.00	84.00	-384.00
	0.00	0.00	0.00	0.00	-152.00	-66.10	-18.00	0.00	0.00	0.00	0.00	0.00	-236.10
	0.00	0.00	0.00	0.00	-16.00	-34.00	-26.00	-168.00	-176.00	-17.60	-168.00	-84.00	-689.60
	0.00	0.00	0.00	36.00	-36.00	-88.00	-8.00	28.00	24.00	176.00	8.00	18.00	158.00
	17.60	-15.00	0.00	-10.60	-32.80	62.40	21.60	11.20	158.40	-158.40	-51.20	-65.60	-62.40
	0.00	0.00	0.00	130.00	144.00	28.00	120.00	36.00	24.00	176.00	168.00	184.00	1,010.00
	-8.00	0.00	0.00	-25.31	-13.99	-11.00	-57.00	0.00	0.00	0.00	-34.99	16.00	-134.29
	0.00	0.00	0.00	76.00	-52.00	-178.00	28.70	26.00	117.00	16.00	0.00	0.00	33.70
	12.00	24.00	0.00	0.00	-8.00	-12.00	-38.00	-40.00	-44.00	-77.00	-68.00	-84.00	-335.00
<b>Grand Total</b>	<b>25.60</b>	<b>-11.00</b>	<b>114.00</b>	<b>124.09</b>	<b>-438.39</b>	<b>-480.30</b>	<b>-479.68</b>	<b>-524.90</b>	<b>-331.60</b>	<b>-1.48</b>	<b>-93.01</b>	<b>63.40</b>	<b>-2,033.27</b>

## Additional Resources:

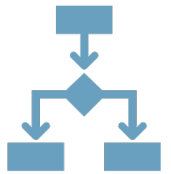
- Capacity vs. Demand by Resource Report
- Capacity vs. Demand by Role or OBS
- Over/ Under Allocation by Resource
- Capacity Overview Portlet
- Role Capacity Portlet

# Implementation Best Practices

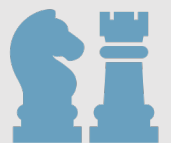
# Implementation Best Practices – Start Simple



- You don't need a high degree of precision to make effective resource management decisions
- The more precision you attempt to get, the more time and effort will be required
- There is a point of diminishing returns



- Staffing & Resource Management is about building effective business processes and takes a coordination and consistency across many groups and functions. Take a crawl, walk, run approach—start simple and then build it out further as needed
- OCM and Sponsorship are key for enterprise planning



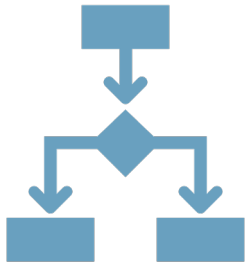
- Assume you have directionally accurate forecast data in the tool. What mechanisms, processes, roles and responsibilities are in place to act on that information? Clearly define the outputs and who is accountable for them

# Open Mic

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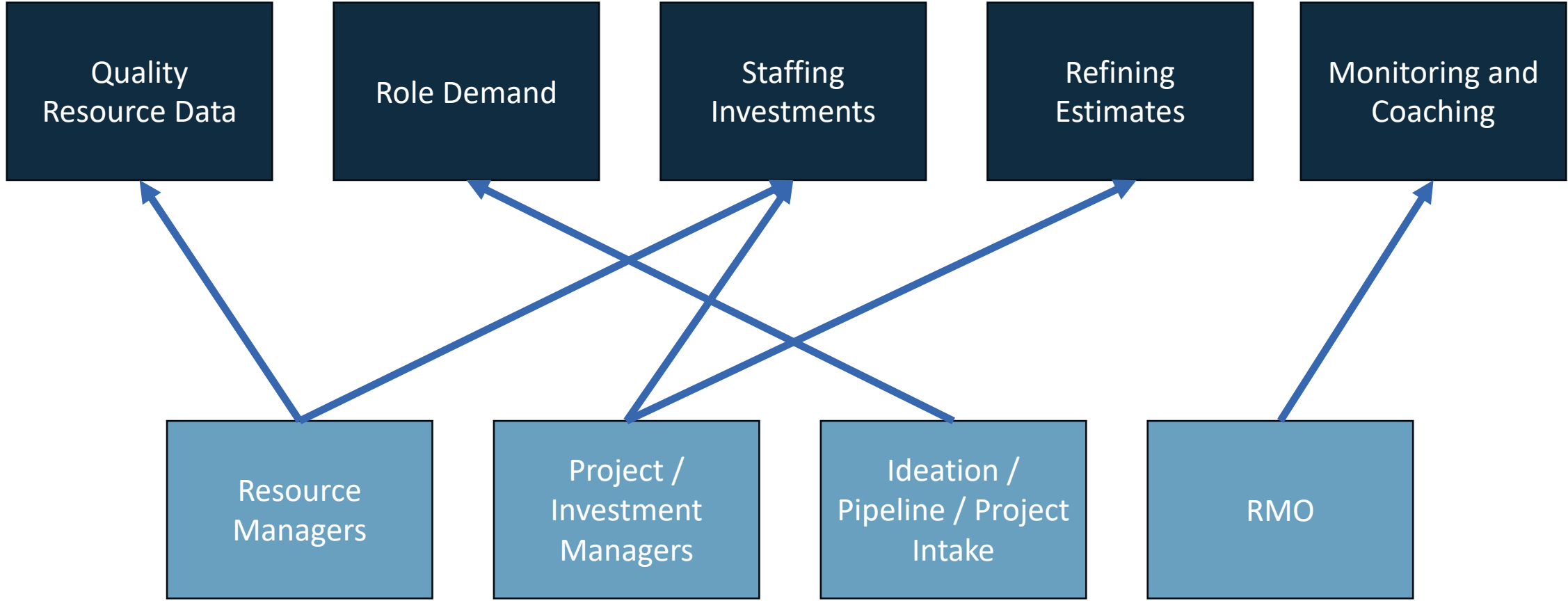
- For those that have a successful implementation of resource management
  - What are some of your best practices?
  - What are your lessons learned?

# Effective Business Processes



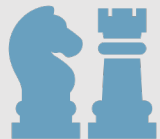
- Staffing & Resource Management is about building and implementing effective business processes
- Supporting business processes in an enterprise tool creates visibility and simplifies management, but is not a magic fix for poorly defined processes

# Processes and Accountability

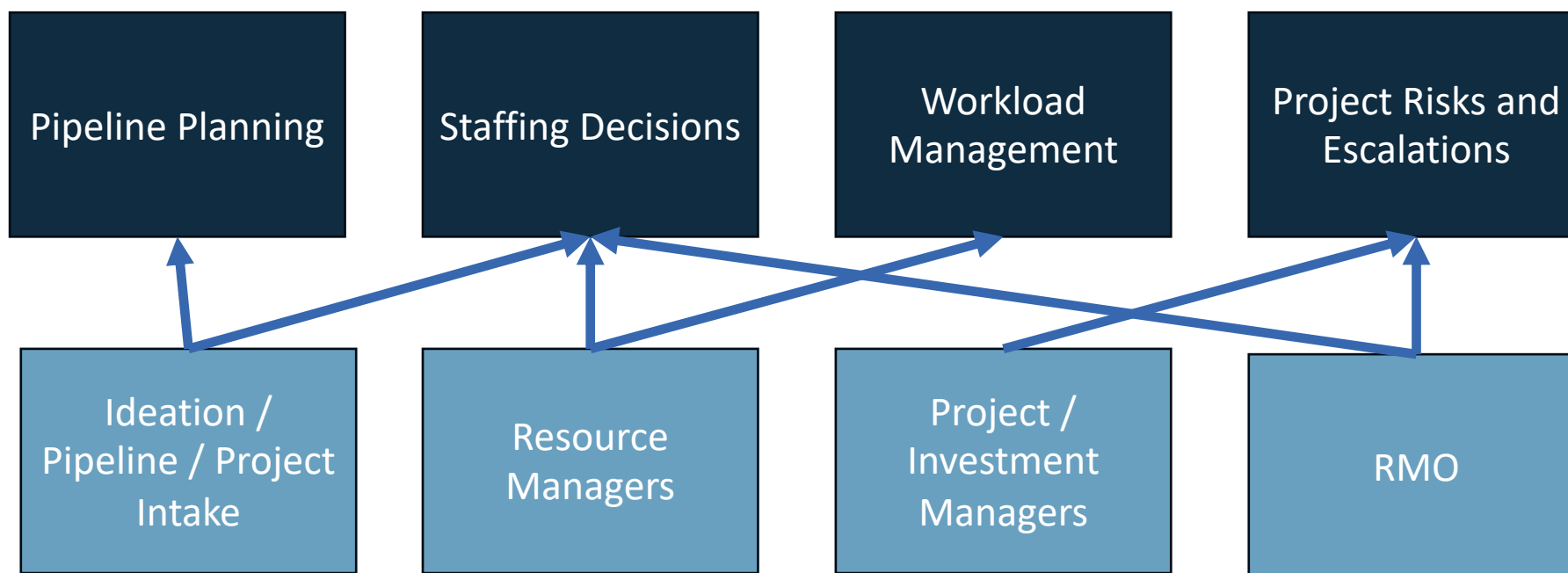




# Leveraging the Data



- Assume you have directionally accurate forecast data in the tool. What mechanisms, processes, roles and responsibilities are in place to act on that information? Clearly define the outputs and who is accountable for them



# Leveraging the Data

In this example, Program and Project Managers are overallocated through the end of the year.

Is this information used by the Intake team when planning Investment start dates? Is this used to planning staff levels?

Staffing 🔔

View  
(Copy) Staffing insights the basics Save

Allocations Timeline Staff Grid

Allocations By Investment Columns


Name	Role	Start	Finish	Allocation	Active	2023-08	2023-09	2023-10	2023-11	2023-12
▼ Chancellor's Concert Series		Feb 13, 2021	Dec 31, 2023		✓	184.00	168.00	176.00	176.00	
Project Manager	Project M...	Feb 13, 2021	Dec 31, 2023	5,968.00	✓	184.00	168.00	176.00	176.00	
Chat BOT AI for Smiths Website		Jul 1, 2023	Jul 1, 2023		✓					
▶ ChatBot Implementation		Jul 20, 2023	Jan 11, 2024		✓	1,472.00	1,344.00	1,408.00	1,408.00	1,408.00
▶ Chatbots for Insurance Compa...		Jul 1, 2019	Dec 31, 2024		✓	358.80	327.60	343.20	343.20	
▶ CL - Digitizing Paper Records w...		Jan 9, 2023	Feb 23, 2024		✓	644.00	588.00	616.00	616.00	

Resources By Role Columns

Full Name	Primary Role	Manager	Resource Remain...	2023-08	2023-09	2023-10	2023-11	2023-12
▶ Program Manager			0.00	1,361.60 / 920.00	1,243.20 / 840.00	1,302.40 / 880.00	1,302.40 / 880.00	1,243.20 / 840.00
▶ Programmer			0.00	184.00 / 368.00	168.00 / 336.00	176.00 / 352.00	176.00 / 352.00	168.00 / 336.00
▶ Project Coordinator			0.00	184.00 / 184.00	168.00 / 168.00	112.00 / 176.00	0.00 / 176.00	0.00 / 176.00
▶ Project Manager			0.00	3,689.20 / 2,944.00	3,368.40 / 2,688.00	3,520.80 / 2,816.00	3,352.80 / 2,816.00	3,200.40 / 2,688.00

# Communication is Key

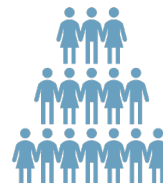
Communication is key!



Project Manager



Team



Resource Manager



Organization



Resources needed

Identify resources

Revise Investment Plan Dates

Capacity vs. Demand

Obtain estimates

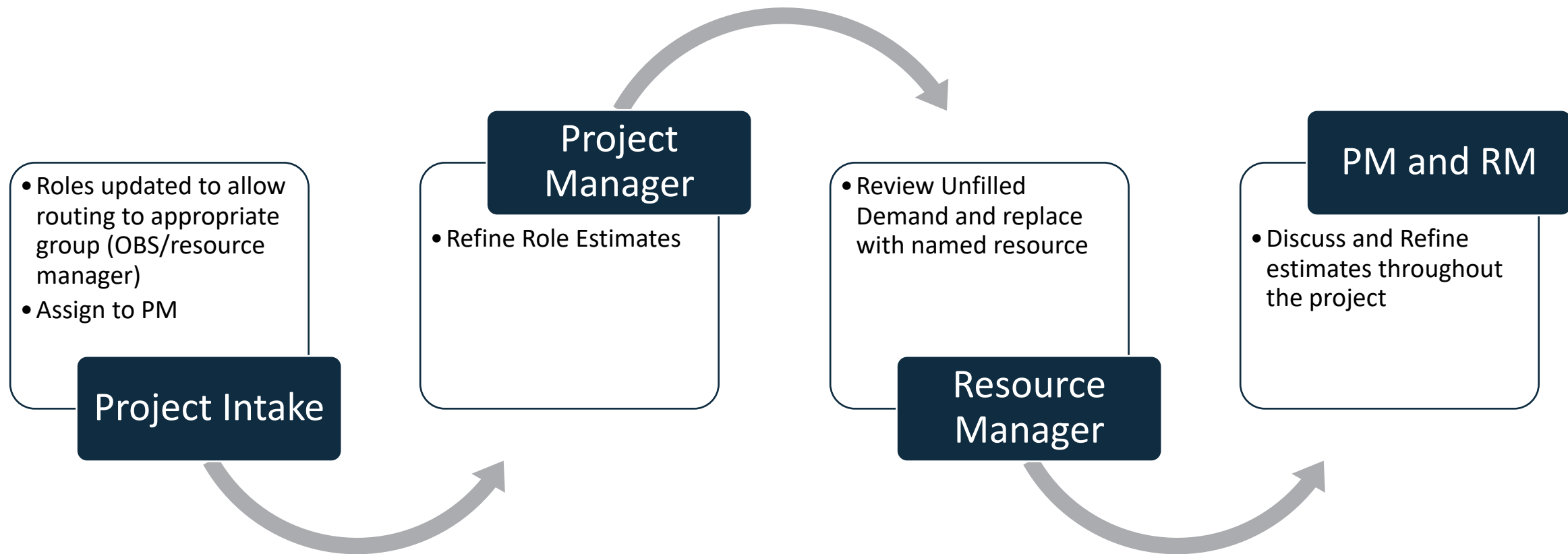
Provide estimates

Identify potential for hiring

Open Roles

Review plan vs. actuals

# Staffing Process Example



# Staffing Process in Clarity

clarity
Staffing
CA

Allocations Timeline   Staff Grid

View (Copy) Architect Demand
Save
Filter Widgets

Allocations By Investment
Columns

Match Filters
All
Any

Is Role (Resource) = Yes
Role Select
+ Add Filter
Remove All

AND
Active (Common Investment) = Yes
Template (Common Investment) = No

Name	Staff/OPS Unit	Start	Finish	Allocation	Default All	2023-07	2023-08	2023-09	2023-10	2023-11	2023-12
A Template for Six Sigma Lean Projects			6/1/24	0.00							
▼ AARD Payments Modules 2023		4/15/19	5/26/25	44,888.67		168.00	184.00	168.00	176.00	176.00	168.00
Business Analyst	Corporate Department ...	4/15/19	5/26/25	8,051.33		0.00	0.00	0.00	0.00	0.00	0.00
Business Analyst		4/15/19	5/26/25	12,731.33		168.00	184.00	168.00	176.00	176.00	168.00
Project Manager		4/15/19	5/26/25	8,023.33		0.00	0.00	0.00	0.00	0.00	0.00
Storage Architect		4/15/19	5/26/25	7,979.33		0.00	0.00	0.00	0.00	0.00	0.00

Resources By Role
Columns

Match Filters
All
Any

Primary Role = Business Analyst
Manager Select
+ Add Filter
Remove All

Full Name	Primary Role	Manager	Person Type	Date of Hire	Date o	2023-07	2023-10	2023-11	2023-12
Goldman, Mark	Business Analyst	Kumar, Arun	Contractor	1/1/01		168.00 / 168.00	184.00 / 184.00	176.00 / 176.00	168.00 / 168.00
Hayes, Todd	Business Analyst	Miller, Rosie	Employee	1/1/01		168.00 / 168.00	184.00 / 184.00	168.00 / 168.00	56.00 / 176.00
Kumar, Arun	Business Analyst	Kumar, Arun	Contractor	1/1/01		0.00 / 168.00	0.00 / 184.00	0.00 / 176.00	0.00 / 176.00
Olney, Pam	Business Analyst	Miller, Rosie	Employee	1/1/01		168.00 / 168.00	184.00 / 184.00	168.00 / 168.00	176.00 / 176.00

# Organizational Change Management

## Why change?

- WIFM (What's In it For Me?)
- Greater Good
- Inevitability

## What do I do?

- Clearly document  
WHO does WHAT and WHEN

## How do I do that?

- Training
- Reference

# Open Mic

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- Is your data more granular than it needs to be?
- Are leaders acting on the available data?
- What OCM practices were effective for your organization?

# Clarity Setup Best Practices



# Availability Best Practices

- Avoid high degrees of precision
  - We need the minimal amount of information to make an informed decisions
- Add corporate holidays to the base calendar
  - In multi-national organizations, it is best to use multiple calendars to represent various holidays and work times (8hr day vs. 7hr day)
- Maintain Date of Hire and Date of Termination
- For contractors, consider maintenance of a Contract End Date
- Ensure Resource Capacity is aligned with Primary Role, Employment Type, and Resource OBS
  - Remember – these are ways to group information. Keep those elements to a manageable set of values / complexity
- Remember – managing resources does not consume a license per resource
- Consider automation for Resource data

# Allocation Best Practices

- Manage allocations by the month
- Adjust expectations of accuracy and granularity according to the time horizon
- Use color-coding or filters to highlight exceptions
- If availability varies, use hours or % Availability as the Work Effort Unit of Measurement
- Encourage users making allocation updates to compare Allocation and prior two months of Actuals to inform estimation

# Assignment Best Practices

- Choose allocations or assignments – not both. Allocations are simpler and easier to manage for initial rollout.
- If using ETC – then run job to sync allocations to assignments.
- Adhere to the “8-80” rule. Tasks and assignments should not be less than 8 hours or more than 80.
- Add ETC to the project team detail view
  - Allows the PM to see where ETC may be piling up (slower burn on the tasks)
  - Allows the PM to see where the allocation may be greater than ETC (faster burn on tasks)
- When using ETC, be aware of start dates and tasks open for time. Delayed starts, without and adjustment of Task Start Date will push ETC forward.

# Reporting Best Practices

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- Start by leveraging OTB views – Staffing Page, Hierarchies, Role Capacity, Resource Workloads, OBS Aggregation
- Additional reporting can assist to ensure the data is:
  - Personalized for the user and use case
  - Summarized to see issues immediately
  - Drillable to allow quick view and update of issues

# Notification Best Practices

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- Use notifications for specific actions needed, you do not want to over communicate
- Emails will provide direct links into Clarity for an action
- Some popular notifications
  - Allocations to individual resources – if this incorrect talk to a manager
  - Exceptions (over/under allocation) to booking manager
  - Schedule key reports (e.g., Over/Under Allocation by Resource) to be delivered via email to RMs and division managers

# Questions?



# Surveys

Please take a few moments to fill out the class survey.  
Your feedback is extremely important for future events.



# Thank You For Attending regoUniversity

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- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
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- Training classes = **Technical**
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Let us know how we can improve!  
Don't forget to fill out the class survey.



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