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A Day in the Life - Resource Manager

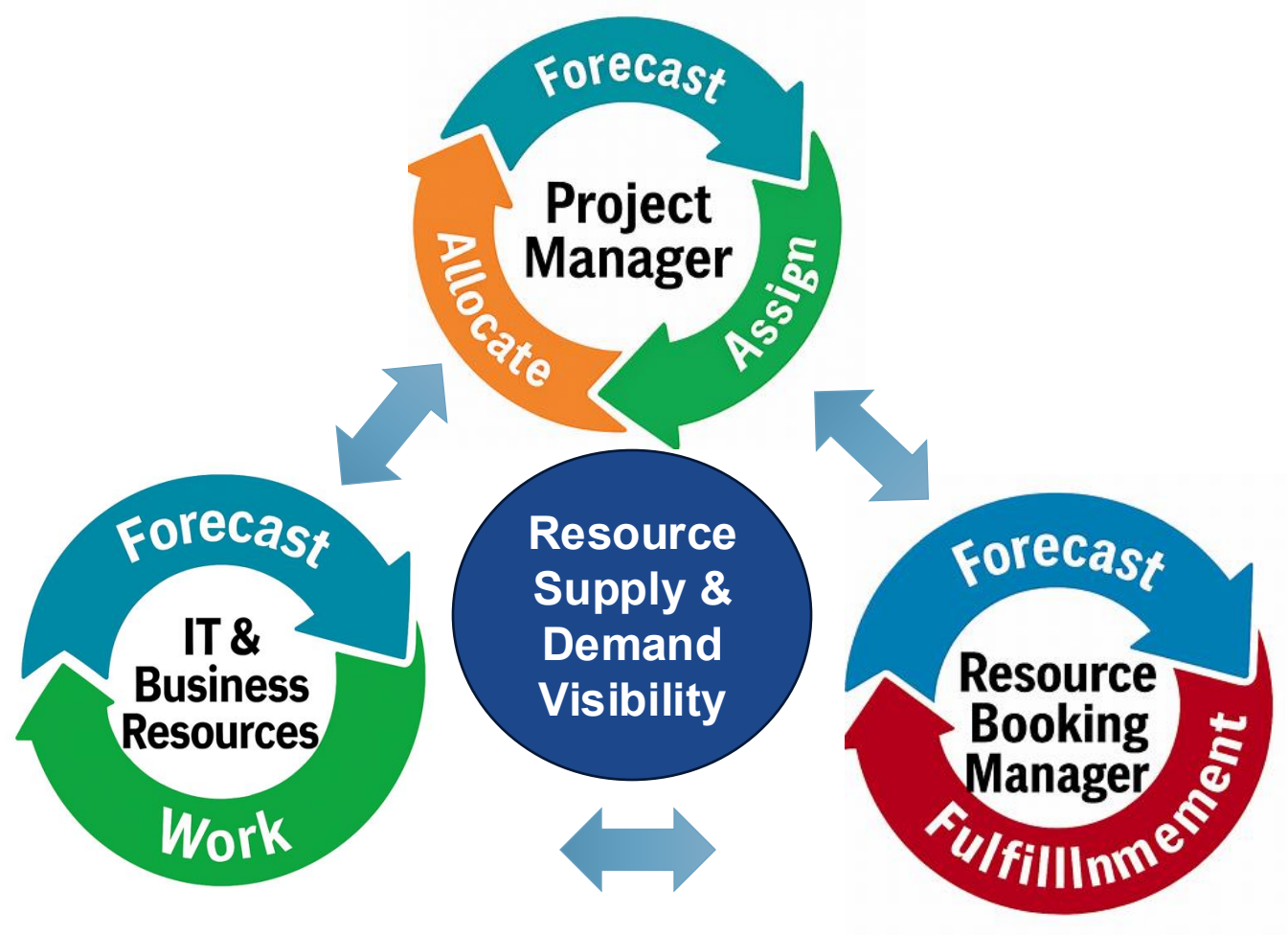
Your Guides:
Michelle Merriam-Day and Hayley Surmann



Agenda

- “Best Practice” RM Process and Weekly Checklist
- Tips and Tricks
- Appendix: Resource Management Reporting Examples

Resources Supply and Demand Visibility



Some Rego Thoughts ... The Big Picture

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 and 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

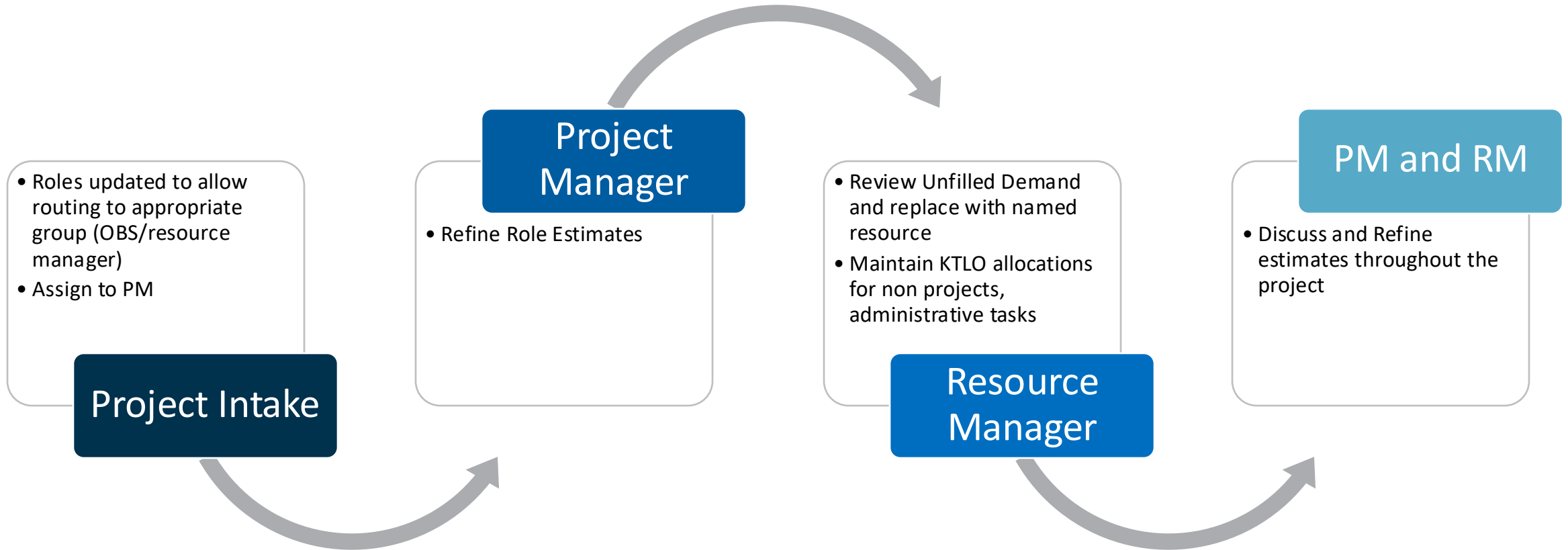
Part II: “Best Practice” Resource

Open Discussion #1

- ? What is your weekly resource management routine?
- ? What steps in the process seem "broken"?



Staffing Process Example



Weekly Checklist for Resource Managers

Weekly Task	Why?
Review and approve timesheets	To ensure accuracy and compliance
Review Unfilled Allocations for your team/department	Replace requested roles with named resources
Review your Resources to ensure appropriate utilization	To ensure resource is appropriately utilized. Inaccurate forecast can impact organizational staffing
Review resource allocations (project level assignments) for accuracy	To ensure resource forecast for each project is accurate Inaccurate forecast can impact organizational staffing
Review 'All Assignments' to ensure resources are completing assignments on time and within appropriate amount of effort	To ensure resource is completing tasks on time and within appropriate effort
Distribute Task Assignment Information to your Team	For people that may not have a Clarity license, send out Task updates by extracting the portlet

New Hire/Transfer Employee Task	Why?
Review resource properties for accuracy	Ensure all attributes are correct (Primary Role, Primary Skill, general details) Attributes are used for capacity / demand planning

Open Discussion #2

- ❓ How much time do you spend managing resource data?
- ❓ What best practices, tips, or tricks have you discovered?
- ❓ Do you use Skills in your organization?



Tips and Tricks – Time Management

Display Effort Gauge & Project Time Gauge. this will show the number of hours entered on the timesheet vs their availability for the timesheet period.

Additional columns can be displayed on the timesheet such as ETC. This configuration can be completed by a Clarity Admin in Classic.

Modern UX Options (applies to Modern UX Timesheet only)

ALLOW ENTRY OF LINE ITEM TOTALS
☒

DISPLAY TIME ATTESTATION MESSAGE ON SUBMIT
☐
(Time attestation message text can be edited in 'Timesheet Attestation Message' Lookup.)

DISPLAY TIME ERRORS AS A TOAST MESSAGE ON SUBMIT
☒
(If using Timesheet Rules, uncheck this option because the rules provide an enhanced error messages panel)

ALLOW END USER COLUMN CONFIGURATION
☒

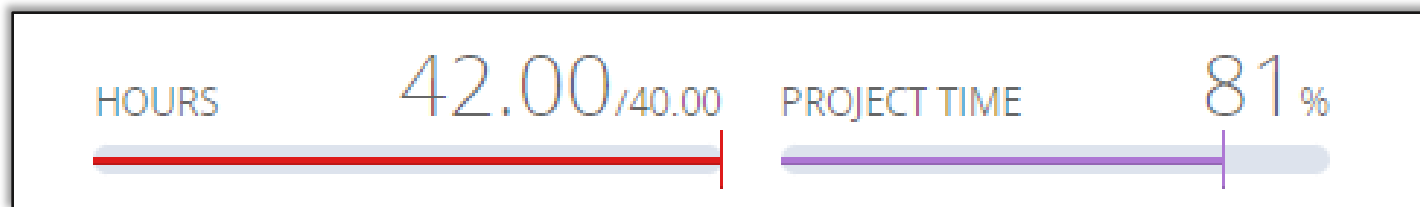
DISPLAY EFFORT GAUGE
☒

DISPLAY PROJECT TIME GAUGE
☒

TIME ENTRY INCREMENT
Any
(Used when entering actuals into time entry fields. Example: If .25 is selected, then .0, .25, .5, .75 are valid.)

☒ = Required

APPLY TO ALL RESOURCES RESTORE DEFAULTS SAVE



Tips and Tricks – Time Management

Approve Multiple Timesheets

- To approve all submitted timesheets at once from the grid view, click the link in the column header
- Click on the box to the left of the Submitted Timesheet to be approved
- Click the Approve or Return button

My Timesheet Review & Approve **Timesheets**

[↓](#)

Select All Deselect All

Group By

Notes	Status ↓	Time Period Start Date	Total
<input type="checkbox"/>	Submitted	May 9, 2022	40
<input type="checkbox"/> ✓	Submitted	May 16, 2022	63
<input type="checkbox"/>	Submitted	Jun 27, 2022	40

My Timesheet Review & Approve **Timesheets**

[↓](#)

Select All Deselect All **3 Items Selected** [Approve](#) [Return](#)

Group By

Notes	Status ↓	Time Period Start Date	Total
<input checked="" type="checkbox"/>	Submitted	May 9, 2022	40
<input checked="" type="checkbox"/> ✓	Submitted	May 16, 2022	63
<input checked="" type="checkbox"/>	Submitted	Jun 27, 2022	40

Tips and Tricks – Resource Management

Staffing

Allocations by Investment Allocations by Resource Assignments by Investment Assignments by Resource **Staff**

Per-Period Metrics - 5 Periods View Staff Grid - Default Save

Manage widgets Filter Widgets

Count of Projects by...

129 Martin, Paul

Allocations by Strat

19% 78%

Projects by Stage

38 /IT/Building
35 /IT/Initiation
21 /New Product Devel...

Widgets

Select All Deselect All

Investment Name

Totals

Monthly Info

Staffing			Totals			2023-06			2023
Group	Investment Name *	Resource Full Name	Actuals	Allocation	Remainin...	Allocation	Actuals	Remainin...	Alloc
▼ Airport Ac (14)			0.00	11,976.00	11,976.00	1,628.00	0.00	1,628.00	
<input type="checkbox"/>	Airport Access Security	Abbott, Karl	0.00	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	Airport Access Security	Agile, Andre	0.00	304.00	304.00	44.00	0.00	44.00	
<input type="checkbox"/>	Airport Access Security	Berks, Paul	0.00	1,216.00	1,216.00	176.00	0.00	176.00	
<input type="checkbox"/>	Airport Access Security	Carmen, Ed	0.00	1,216.00	1,216.00	176.00	0.00	176.00	
<input type="checkbox"/>	Airport Access Security	Developer	0.00	1,216.00	1,216.00	176.00	0.00	176.00	
<input type="checkbox"/>	Airport Access Security	Evans, Nick	0.00	1,092.80	1,092.80	52.80	0.00	52.80	
<input type="checkbox"/>	Airport Access Security	Gupta, Rakesh	0.00	608.00	608.00	88.00	0.00	88.00	
<input type="checkbox"/>	Airport Access Security	iOS Team	0.00	243.20	243.20	35.20	0.00	35.20	

Tips and Tricks – Resource Management

- Copy and paste functionality in cells (similar to Excel)
- Ability to view allocation by investment or resource

Allocations By Investment

Allocations By Resource

Assignments By Investment

Assignments By Resource

Staff

Investments

View

(Copy) Project Staffing Overview

Save

2

Hide empty groups

1-100 of 117

Columns

Name	Role	Start	Finish	Allocation	Default Allocation	2025-01	2025-02	2025-03	2025-04	2025-05	2025-06	2025-07	2025-08	2025-09	2025-10	2025-11	2025-12
▶ Abeygunewardene, Shamith		8/11/23	12/31/27	3,713		▲ 202	176	▲ 185	▲ 210	▲ 370	▲ 353	▲ 386	▲ 353	▲ 370	▲ 386	▲ 336	▲ 386
▶ ABM Marketing		8/3/24	3/28/25	504		184	160	160									
▶ AI Team		3/1/23	12/31/27	0		0	0	0	0	0	0	0	0	0	0	0	0

Details

WARNING: Copy & Paste will override default allocations

Tips and Tricks – Unfilled Allocations

- Do you have a high turnover of resources within a project? Do you struggle with, “How do I move the demand from a named resource to a role until a new resource is found?”
 - Under Allocations by Investment or Allocations by Resource, include the Is Role attribute in your filter and set to Yes. Then simply move your cursor.

Resources by Role				1-21 of 21											
Resource Availability	Primary Role	Manager	Person Type	2025-01	2025-02	2025-03	2025-04	2025-05	2025-06	2025-07	2025-08	2025-09	2025-10	2025-11	2025-12
Corporate Marketing	Corporate Marke...			10,480 / 1,...	8,976 / 1,1...	9,464 / 1,1...	10,200 / 1,...	10,248 / 1,...	10,096 / 1,...	8,096 / 1,2...	7,264 / 1,1...	7,392 / 1,2...	7,728 / 1,2...	6,720 / 1,1...	7,712 / 1,2...
Engineer	Engineer			184 / 184	160 / 160	224 / 168	352 / 176	352 / 176	336 / 168	368 / 184	336 / 168	352 / 176	368 / 184	320 / 160	184 / 184
Amos, Cheryl	Engineer	Fowler, Ray	Employee	21,359 / 8,...	18,218 / 7,...	20,410 / 7,...	22,359 / 7,...	22,906 / 7,...	18,876 / 7,...	15,636 / 8,...	14,246 / 7,...	14,706 / 7,...	13,719 / 8,...	11,929 / 7,...	13,719 / 8,...
Andersson, Peter	Engineer	Miller, Rosie	Employee	368 / 184	320 / 160	413 / 168	570 / 176	570 / 176	544 / 168	411 / 184	376 / 168	394 / 176	411 / 184	358 / 160	411 / 184
Awad, Rashid	Engineer	Miller, Rosie	Employee	0 / 184	0 / 160	166 / 168	108 / 176	123 / 176	168 / 168	182 / 184	249 / 168	261 / 176	273 / 184	237 / 160	273 / 184
Berry, Jason	Engineer	Fowler, Ray	Employee	338 / 184	294 / 160	309 / 168	324 / 176	324 / 176	309 / 168	338 / 184	309 / 168	324 / 176	338 / 184	294 / 160	338 / 184
Bhatt, Rakesh	Engineer	Fowler, Ray	Employee	0 / 184	0 / 160	128 / 168	176 / 176	176 / 176	168 / 168	184 / 184	168 / 168	176 / 176	184 / 184	160 / 160	184 / 184

Tips and Tricks – Assignments

- Assignments by Resource: View Team/Resource → Assignments
- Assignments by Investment: View Assignments → Team/Resource
- In each section: Reallocate, Edit Assignments, Replace Resource

The image displays three screenshots of the Rego staffing interface, illustrating different views and actions available for assignments.

Left Screenshot: Shows the 'Staffing' interface with the 'Assignments By Resource' view selected. The table displays assignments for 'Amos, Cheryl' (Engineer) across various months (2025-01 to 2025-12). A context menu is open over the 'Amos, Cheryl' row, showing options: Open Details, Collapse all, Reallocate, Edit Assignments, Replace, and Delete.

Middle Screenshot: Shows the 'Staffing' interface with the 'Assignments By Investment' view selected. The table displays assignments for 'Amos, Cheryl' (ML Engineer) across various months (2025-07 to 2025-09). A context menu is open over the 'Amos, Cheryl' row, showing options: Open Details, Collapse all, Reallocate, Edit Assignments, Replace, and Delete.

Right Screenshot: Shows the 'Staffing' interface with the 'Assignments By Investment' view selected. The table displays assignments for 'Amos, Cheryl' (ML Engineer) across various months (2025-02 to 2025-05). A context menu is open over the 'Amos, Cheryl' row, showing options: Open Details, Collapse all, Reallocate, Edit Assignments, Replace, and Delete.

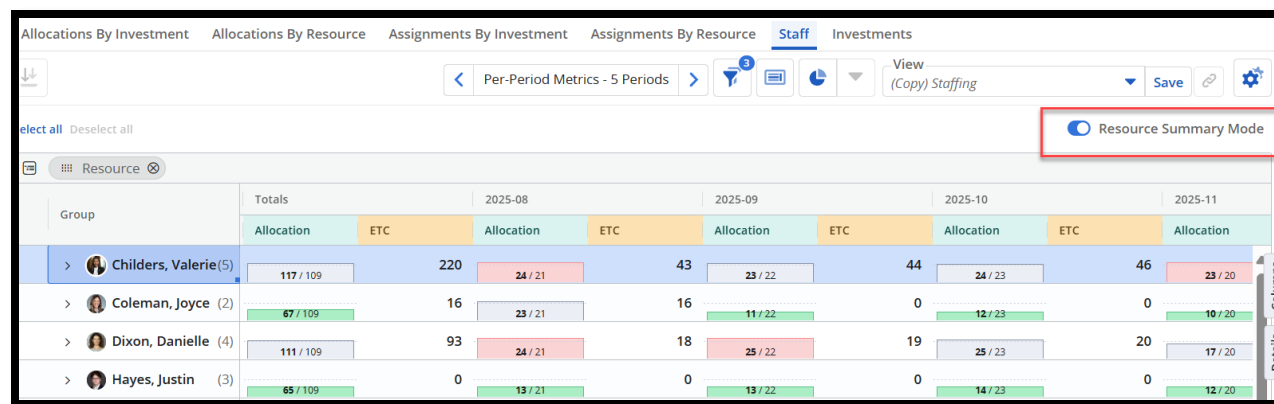
Open Discussion #3

- ❓ How do you know if your data is good?
- ❓ Which reports/portlets do you use to report capacity, demand and other resource management information?



Tips and Tricks – Resource Utilization

- Enable Resource Summary Mode in the Staff grid to display staff data with a histogram to visualize resource availability
- This mode enables quick identification of staffing levels across different skillsets and departments, helping managers make informed decisions on resource allocation
- Change timescales to monthly to facilitate easier population of allocated hours by month



- Use the department OBS in combination with primary role to help eliminate the need for redundant roles (ex. Team X developer, Team Y developer)
- Leverage adoption metrics to monitor and improve adherence

Tips and Tricks – New Hire/Transfer

- Don't forget basic housekeeping!
 - Review Resource Information – do they have the right role/obs/general details?
 - Group of Resources – Configured view; make mass updates
 - Individual Resource – Resource properties; make individual updates

The screenshot displays the 'Resources' interface. The top section includes tabs for 'Resources', 'Roles', and 'Teams'. Below these are search and filter options, including a search bar and a 'View' dropdown set to 'Active Resources'. A 'Match Filters' section allows for filtering by 'All' or 'Any' criteria. A table lists resources with columns for 'Full Name', 'Resource ID', 'Primary Role', 'Manager', and 'Email Address'. The table includes checkboxes for selection and a 'Group By' dropdown. An inset window shows the 'Properties' tab for a specific resource, 'Morris, Tom', with fields for 'Last Name', 'First Name', 'Resource ID', 'Email Address', 'Primary Role', 'Manager', 'Booking Manager', 'Resource Type', 'Availability Rate', 'Person Type', and 'OBS'.

	Full Name ↓	Resource ID ★	Primary Role	Manager	Email Address
<input type="checkbox"/>	z_xog, xog	DO NOT CHANGE ...			alyson.poston@regoconsulting.com
<input type="checkbox"/>	Werner, Robbie	robbie	Architect	Werner, Bob	bob.werner@regoconsulting.com
<input type="checkbox"/>	Werner, Bob	bobw	Business Analyst	Arpel, Ian	bob.werner@regoconsulting.com
<input type="checkbox"/>	Walker, Terry	terryWalker	QA	Miller, Rosie	brian.toplicar@regoconsulting.com
<input type="checkbox"/>	Turner, Bruce	bruceTurner	QA	Fowler, Ray	brian.toplicar@regoconsulting.com
<input type="checkbox"/>	Travel	travel	Travel Expenses	Arpel, Ian	

Resource # Morris, Tom tomMorris

Properties Certifications Calendar

▼ Collapse all

Summary

Last Name: Morris
First Name: Tom
Resource ID: tomMorris
Email Address: brian.toplicar@regoconsulting.com

Resource Management

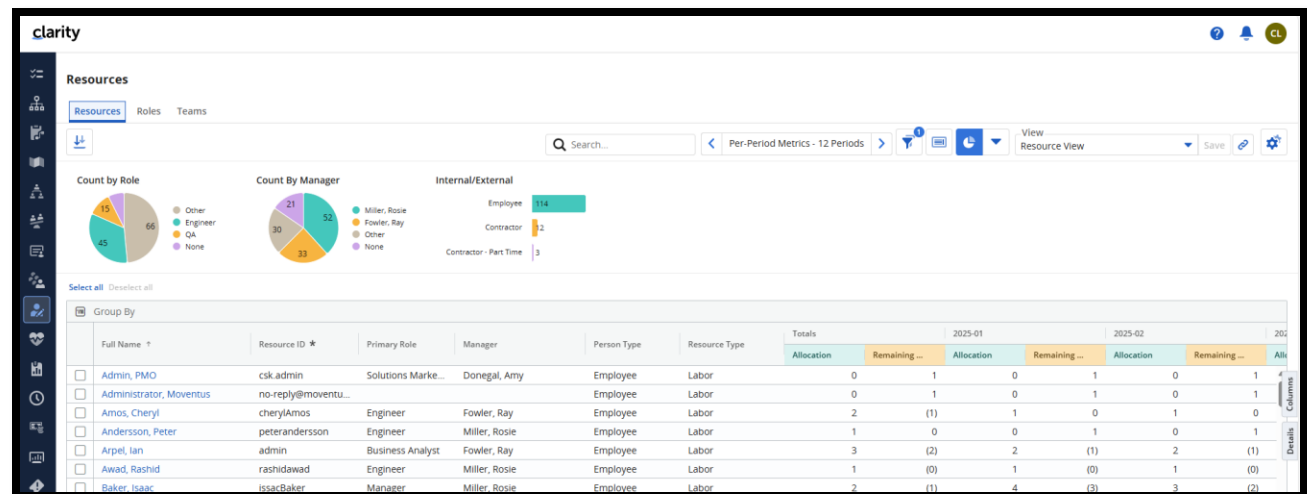
Primary Role: Architect
Manager: Fowler, Ray
Booking Manager: Fowler, Ray
Resource Type: Labor
Availability Rate: 8.00
Person Type: Employee

OBS

Resource Pool: People/BU Staff

Tips and Tricks – Task Awareness

- Teams and Roles may now be assigned to tasks
- In previous versions, only named resources could be assigned to tasks



EXAMPLES

The screenshot shows the 'Assignments' page for the 'Complete Project Plan' (LM.001.050). It includes a table with columns for Resource, Role, Start, Finish, and Actuals.

Resource	Role	Start	Finish	Actuals
Granger, Paula	Project Manager	Jan 8, 2024	Feb 9, 2024	0
Hill, Wayne	Business Analyst	Jan 8, 2024	Jan 12, 2024	1
Morris, Tom	Architect	Jan 8, 2024	Jan 12, 2024	1

The screenshot shows the 'Assignments' page for the 'Blackhawks Team' (TM00005). It includes a table with columns for Name, Start, Finish, Status, Task Owner, ETC, Has Assignments, and Key Task.

Name	Start	Finish	Status	Task Owner	ETC	Has Assignments	Key Task
Blackhawks Team	Aug 11, 2023	Aug 28, 2026	Not Started		5	✓	

Tips and Tricks – Task Awareness

- Use notifications to prompt user action or increase awareness
 - Resource added to the system; Key changes to a resource record; Resource Over/Under Allocated; New Demand; Unfilled Demand Aging

The screenshot shows the Clarity software interface. On the left, there's a sidebar with a 'clarity' logo and a 'Notifications' section. The 'Notifications' section has a 'New Notification' button and a list of notifications. The notification 'Notify booking manager when blackhawks team is added' is selected. A dialog box titled 'Update Notification - Step 1 of 3' is open. The dialog has two main sections: 'Description' and 'Content'. In the 'Description' section, the 'Name' field is filled with 'Notify booking manager when blackhawks team is added' and the 'Target Object' dropdown is set to 'Staff'. In the 'Content' section, the 'Subject' field is filled with 'Blackhawks added to investment \${team.prprojectid}' and the 'Priority' dropdown is set to a default value. The 'Message' field contains the text 'Hello, The Blackhawks team has been added to \${team.prprojectid} with a default allocation of \${team.prallocdefault}.' There are 'Add attribute' buttons and 'Cancel'/'Next' buttons at the bottom of the dialog.

Create a **Simple or Complex Notification**. For a **Simple Notification**, both the Target and Resource Attribute (Recipient) are the same. For a **Complex Notification**, you can create multiple conditions for the notification. Click **Save**.

Tips and Tricks – Task Awareness

- Create Task Notifications in Clarity

clarity

Administration ▸

Notifications

↓ New Notification

Select all Deselect all

Group By

Name *

- ☐ Notify when Project is placed On Hold
- ☐ Notify Owner they have a To Do
- ☒ Notify Assignees they have been assigned to a Task
- ☐ Notify Originating Requestor (Idea) on Submission
- ☐ Agreement Status Alert
- ☐ Notify booking manager when blackhawks team is added
- ☐ Status Change in Change Request

Update Notification - Step 1 of 2

Description
Identify and map the notification.

Name *
Notify Assignees they have been assigned to a Task

Target Object *
Task

Description
Notify Assignees they have been assigned to a Task

Content
Configure the message to recipients.

Subject *
You have been assigned to this task: \${task.pname}

Priority
Medium

+ Add attribute

Message
Better get to work. Time's a-wasting...

+ Add attribute

Cancel Next

Questions?





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Surveys

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



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Appendix: Resource Management Portlet Examples



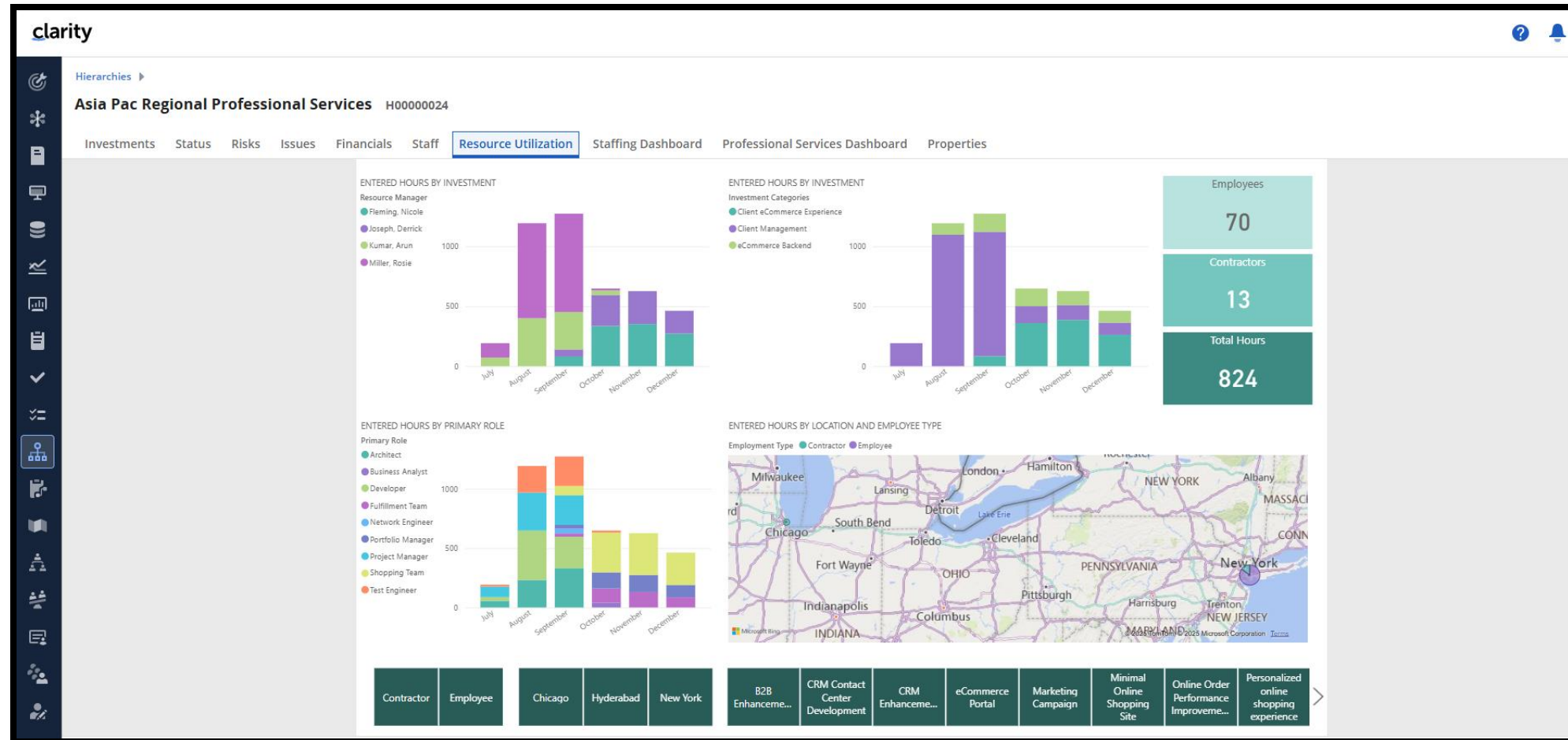
Reporting - Staffing

Staffing – Staff

<div> Allocations By Investment Allocations By Resource Assignments By Investment Assignments By Resource Staff Investments </div>										
<div> <div> Per-Period Metrics - 5 Periods </div> <div> 3 </div> <div> View (Copy) Staffing </div> <div> Save </div> <div> </div> </div>										
<div> elect all Deselect all </div>										
<div> Resource </div>										
Group	Totals	2025-08		2025-09		2025-10		2025-11		
	Allocation	ETC	Allocation	ETC	Allocation	ETC	Allocation	ETC	Allocation	
> Childers, Valerie(5)	117 / 109	220	24 / 21	43	23 / 22	44	24 / 23	46	23 / 20	
> Coleman, Joyce (2)	67 / 109	16	23 / 21	16	11 / 22	0	12 / 23	0	10 / 20	
> Dixon, Danielle (4)	111 / 109	93	24 / 21	18	25 / 22	19	25 / 23	20	17 / 20	
> Hayes, Justin (3)	65 / 109	0	13 / 21	0	13 / 22	0	14 / 23	0	12 / 20	

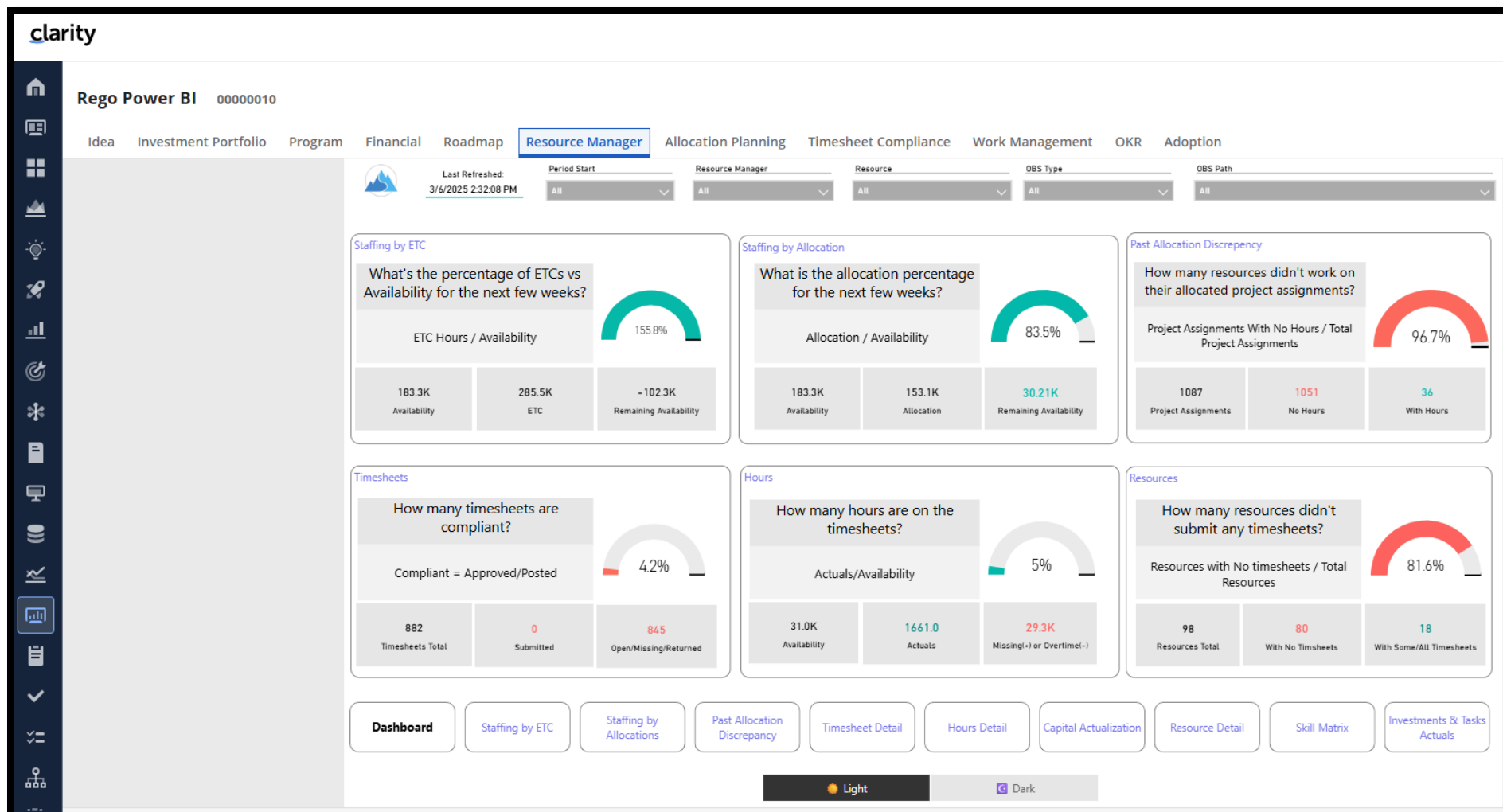
Reporting - Hierarchies

Hierarchies – Resource Utilization



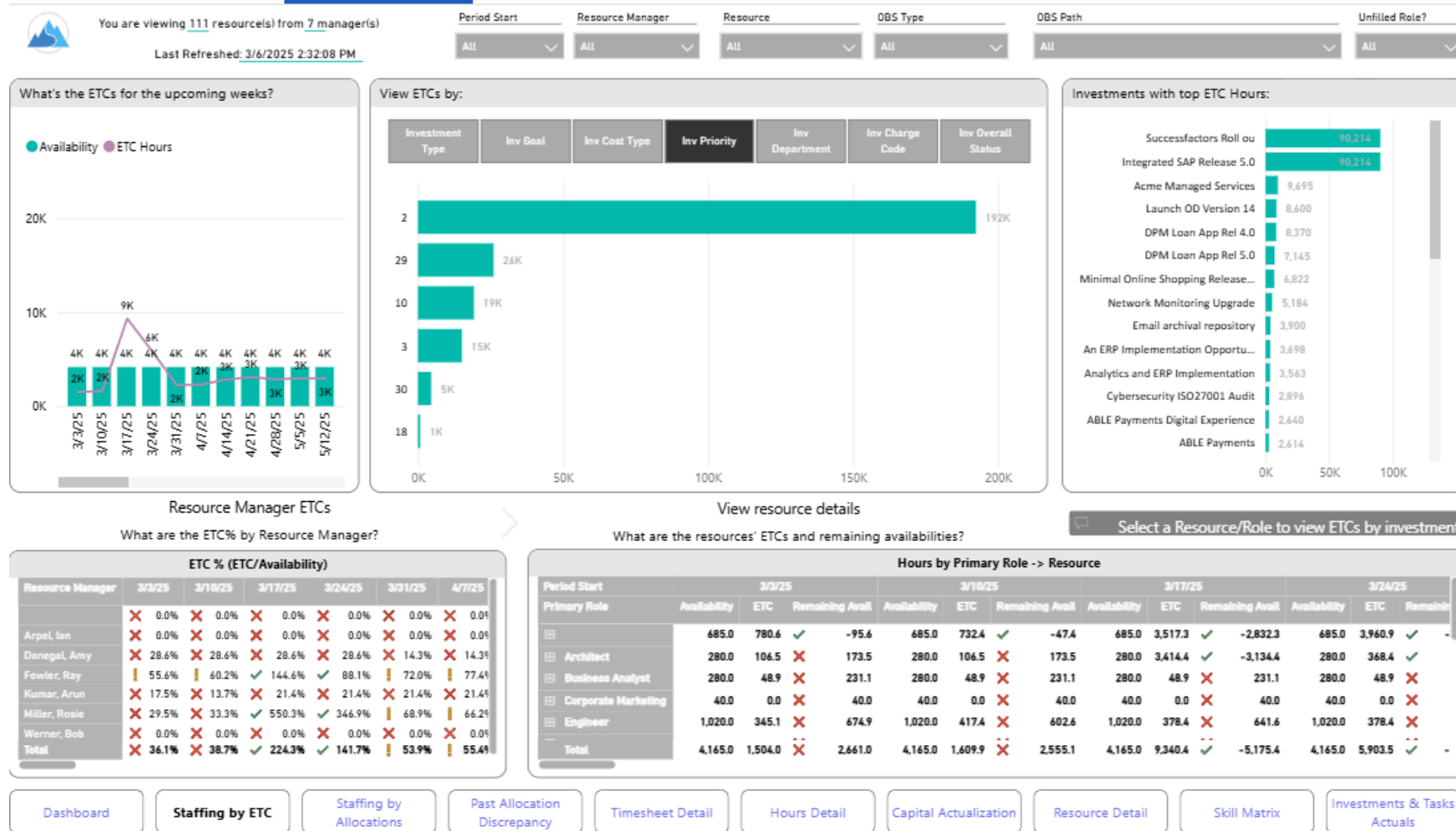
Reporting - Resource Power BI

Rego Power BI – Resource Manager



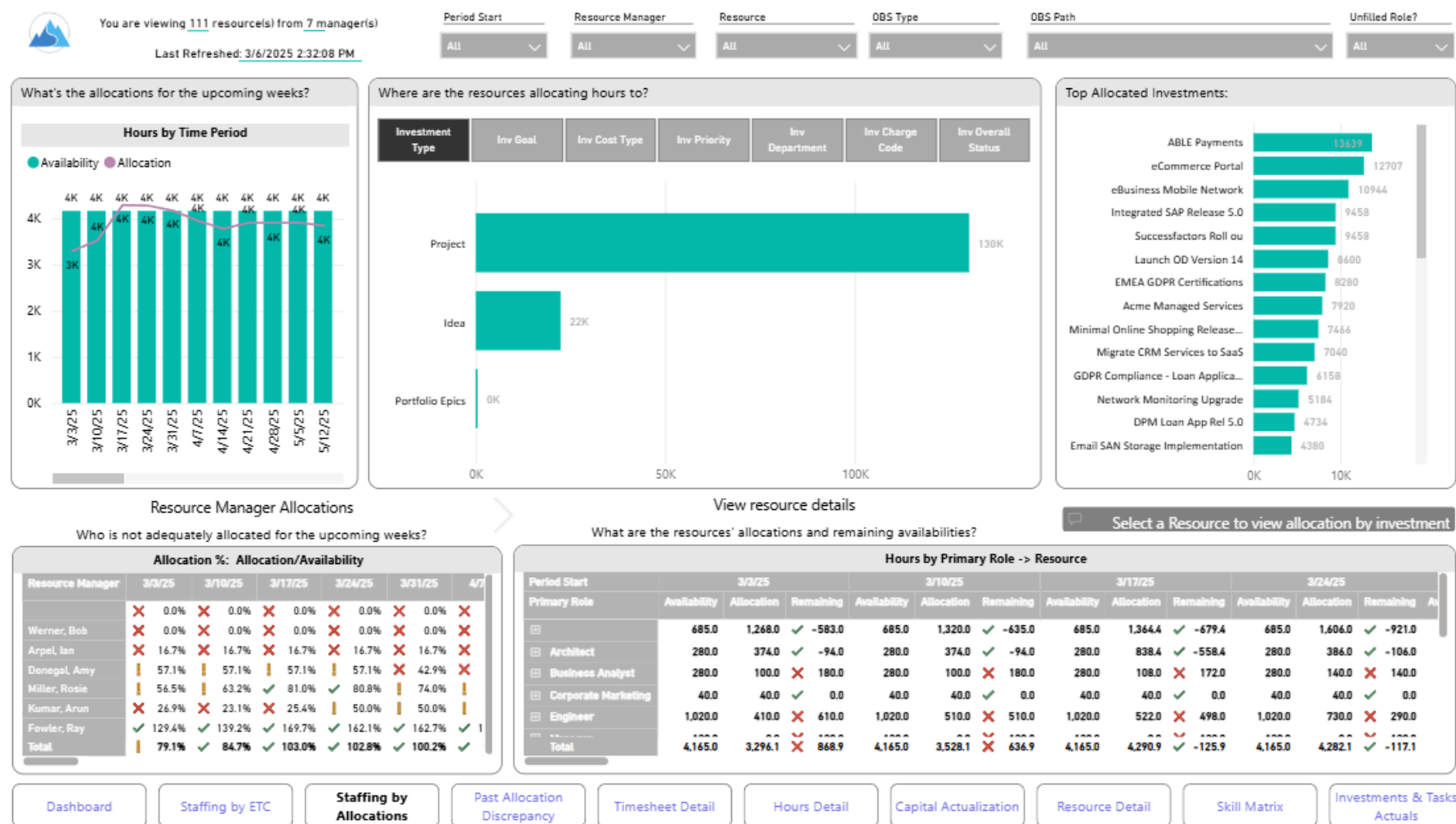
Reporting - Resource Power BI

Rego Power BI – Resource Manager



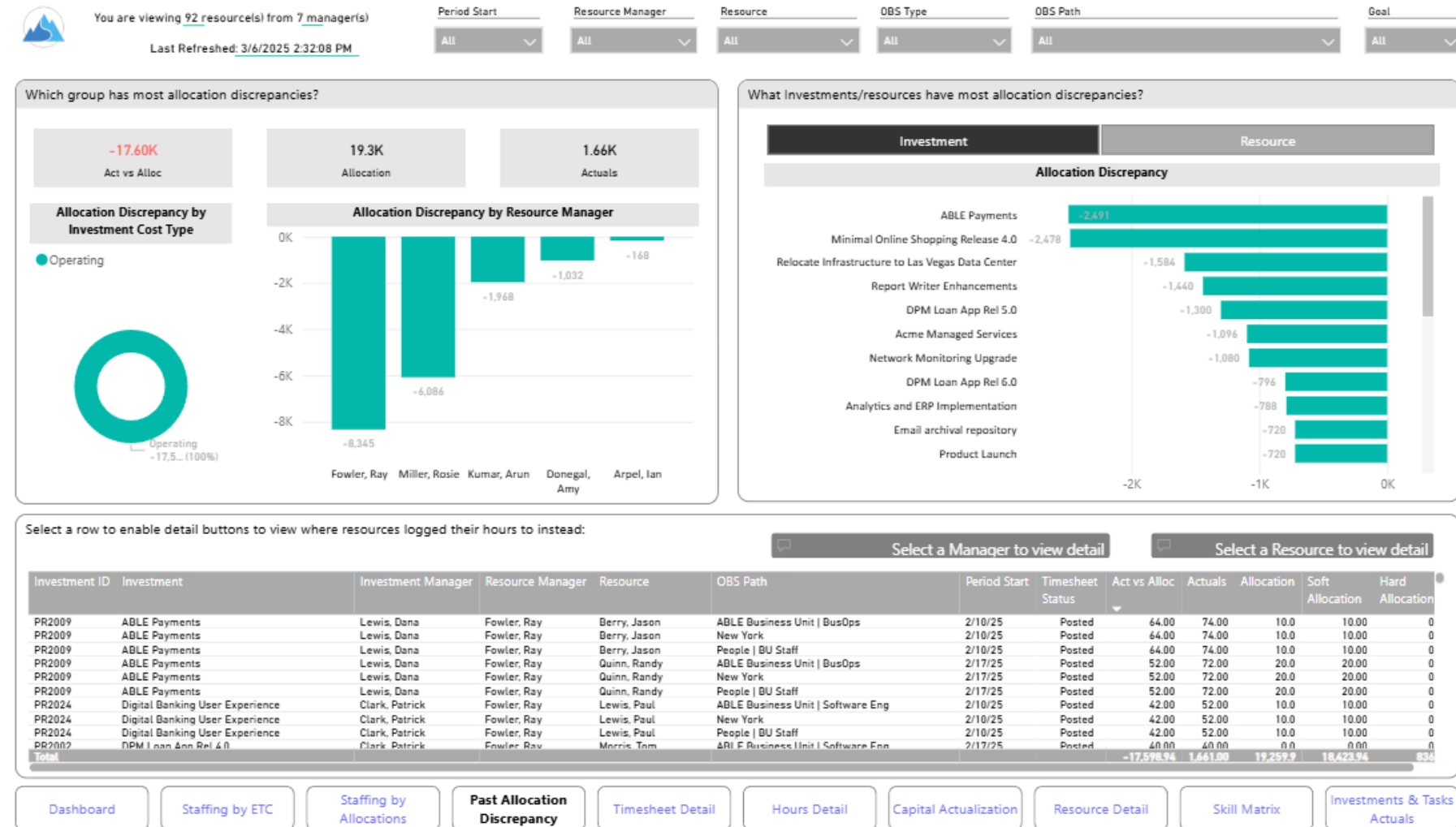
Reporting - Resource Power BI

Rego Power BI – Resource Manager



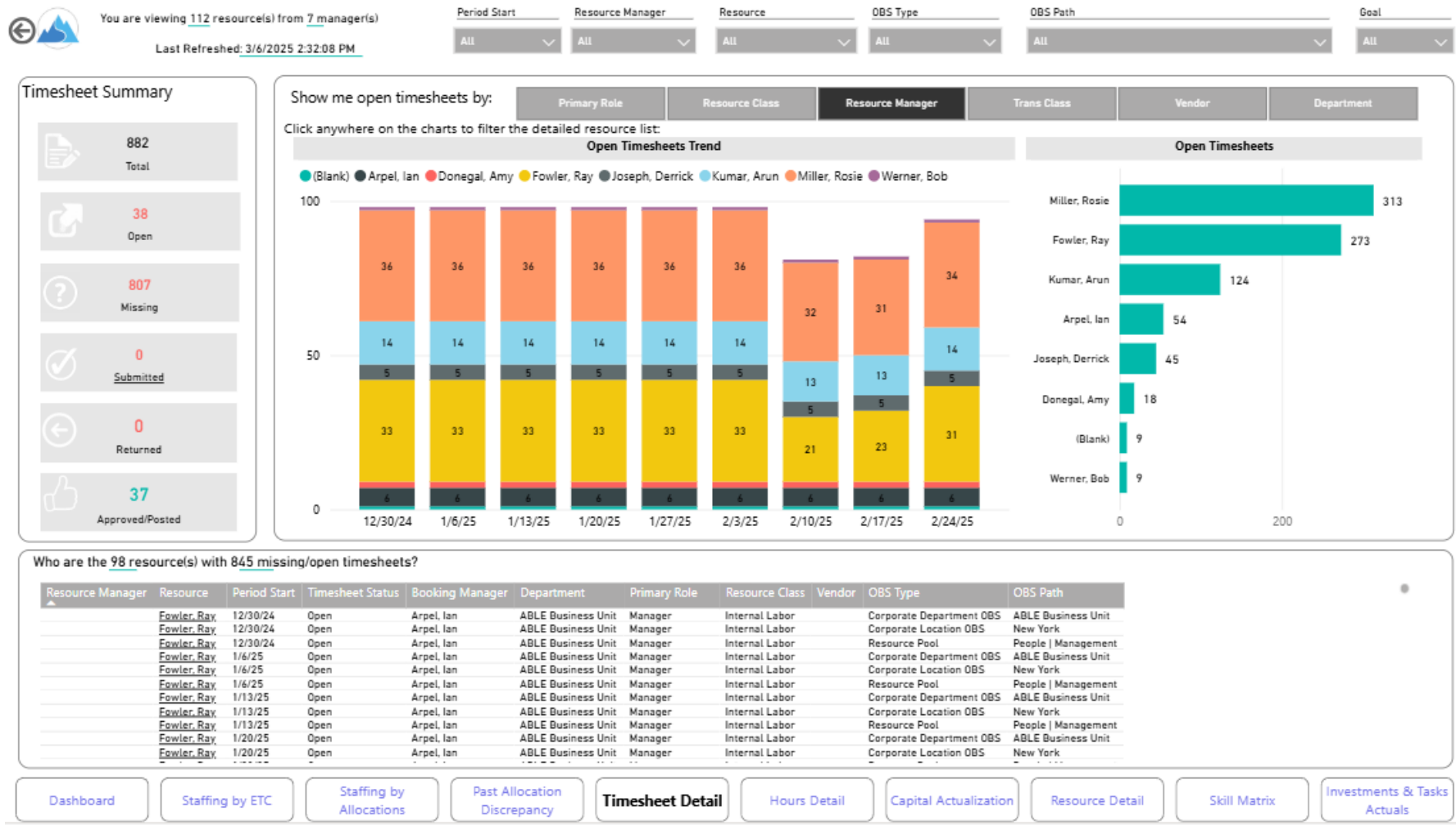
Reporting - Resource Power BI

Rego Power BI – Resource Manager



Reporting - Resource Power BI

Rego Power BI – Resource Manager



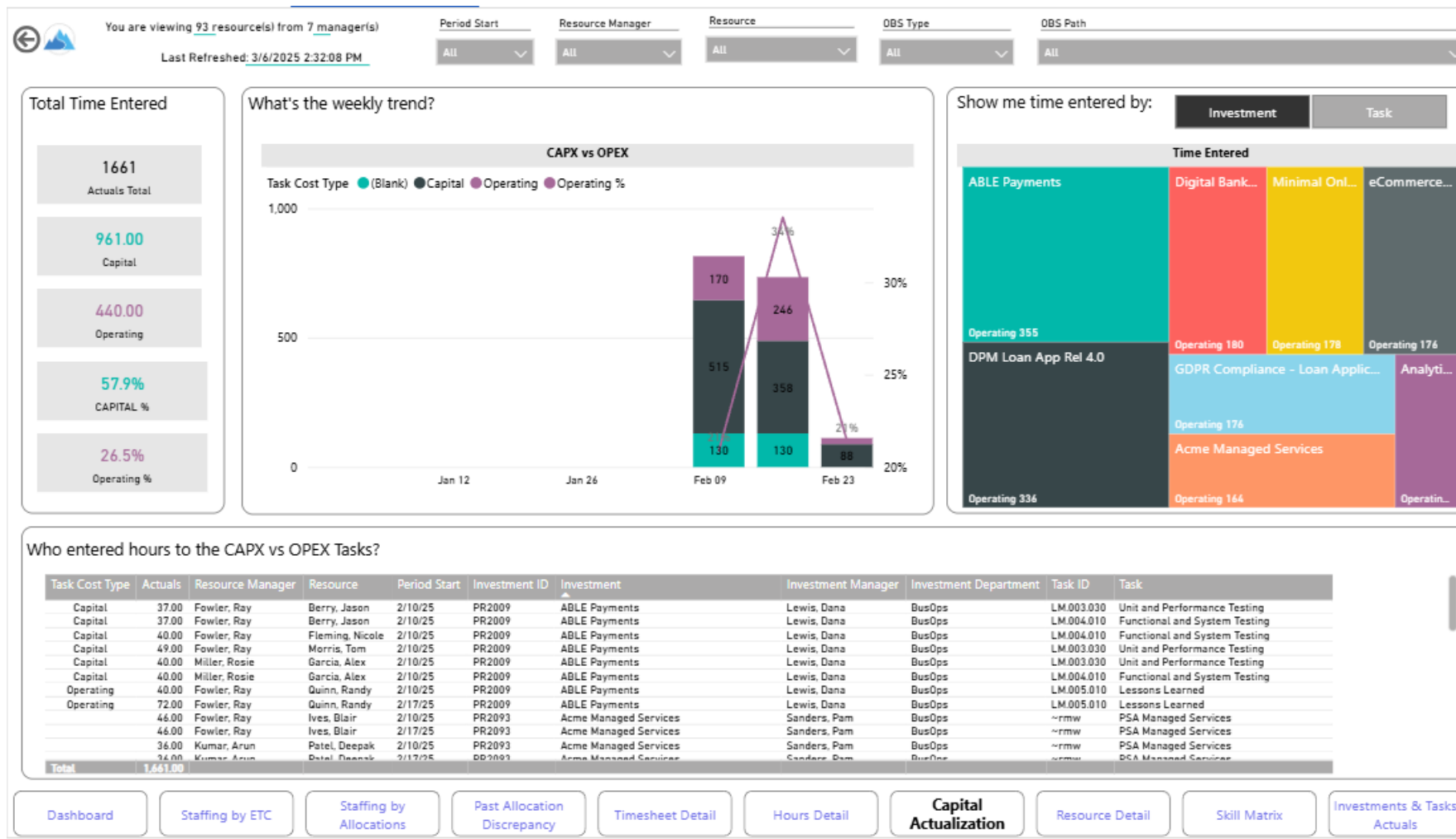
Reporting - Resource Power BI

Rego Power BI – Resource Manager



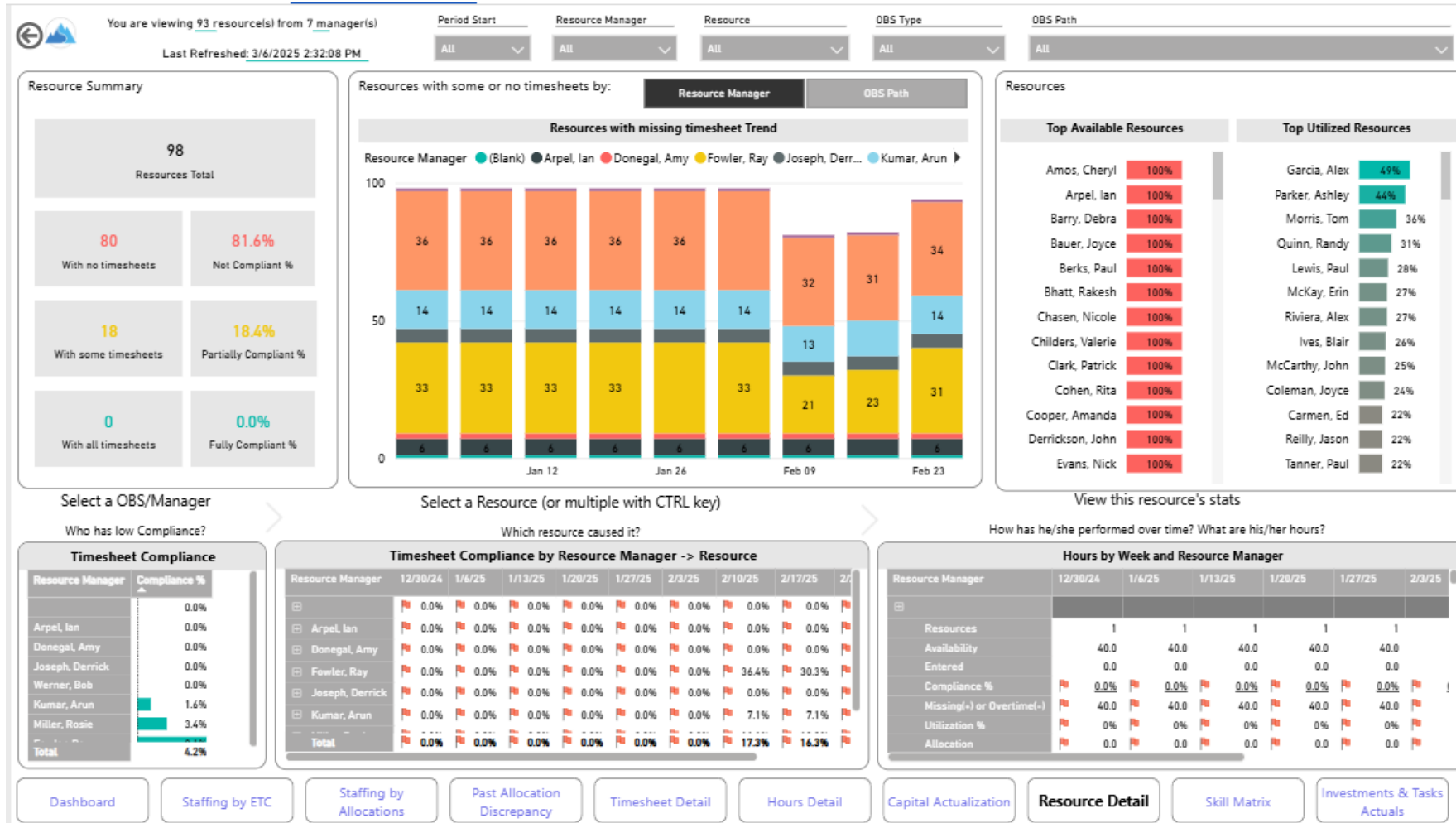
Reporting - Resource Power BI

Rego Power BI – Resource Manager



Reporting - Resource Power BI

Rego Power BI – Resource Manager



Reporting - Resource Power BI

Rego Power BI – Resource Manager



Reporting - Resource Power BI

Rego Power BI – Resource Manager



Task Assignments!

- All Task Assignments and Status in one page:

