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Resources, Calendars, & Teams

Your Guides:
David Zywiec and Rajini Mamidi

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Introductions

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



Agenda

- Introduction
- Resources and Resource Administration
- Calendar Management
- Teams Investment

Resource Management: Introduction



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



The screenshot displays the Clarity software interface for resource management. The top navigation bar includes the 'clarity' logo and a 'Staffing' section with a 'Scenario' dropdown set to '-- Select --'. Below this, a tabbed interface shows 'Allocations By Resource' as the active view, with other tabs for 'Allocations By Investment', 'Assignments By Investment', 'Assignments By Resource', 'Staff', and 'Investments'. A sidebar on the left contains various icons, with the 'Staffing' icon highlighted. A 'Hide empty groups' toggle is visible. The main table lists resources with columns for Name, Role, Start, Finish, and Allocation, followed by a grid showing allocation values for the months of 2025 (January to April). The resources listed are Arpel, Ian; Awad, Rashid; Bajjuri, Naresh; and Baker, Isaac.

Name	Role	Start	Finish	Alloc	2025-01	2025-02	2025-03	2025-04
▶ Arpel, Ian		Jun 24, 2024	Dec 31, 2025		184	160	168	▲ 226
▶ Awad, Rashid		Aug 11, 2023	Dec 7, 2027		▲ 353	▲ 307	▲ 322	▲ 338
▶ Bajjuri, Naresh		Mar 1, 2025	Dec 31, 2026				96	▲ 272
▶ Baker, Isaac		Mar 8, 2024	Dec 31, 2027		▲ 648	▲ 480	▲ 516	▲ 352

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 OOTB 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 and Demand

How much work can we do in a month?

Resource Availability
Availability in Hours / Day

Capacity
Sum of Availability over Time

Demand
Hours needed for investments over time

Staffing

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

Match Filters: **AB** Any Add filter groups

Staff OBS Unit Select Investment Name Select Resource Manager Select Remaining Availability Select Add Filter Remove all

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

Select all Deselect all

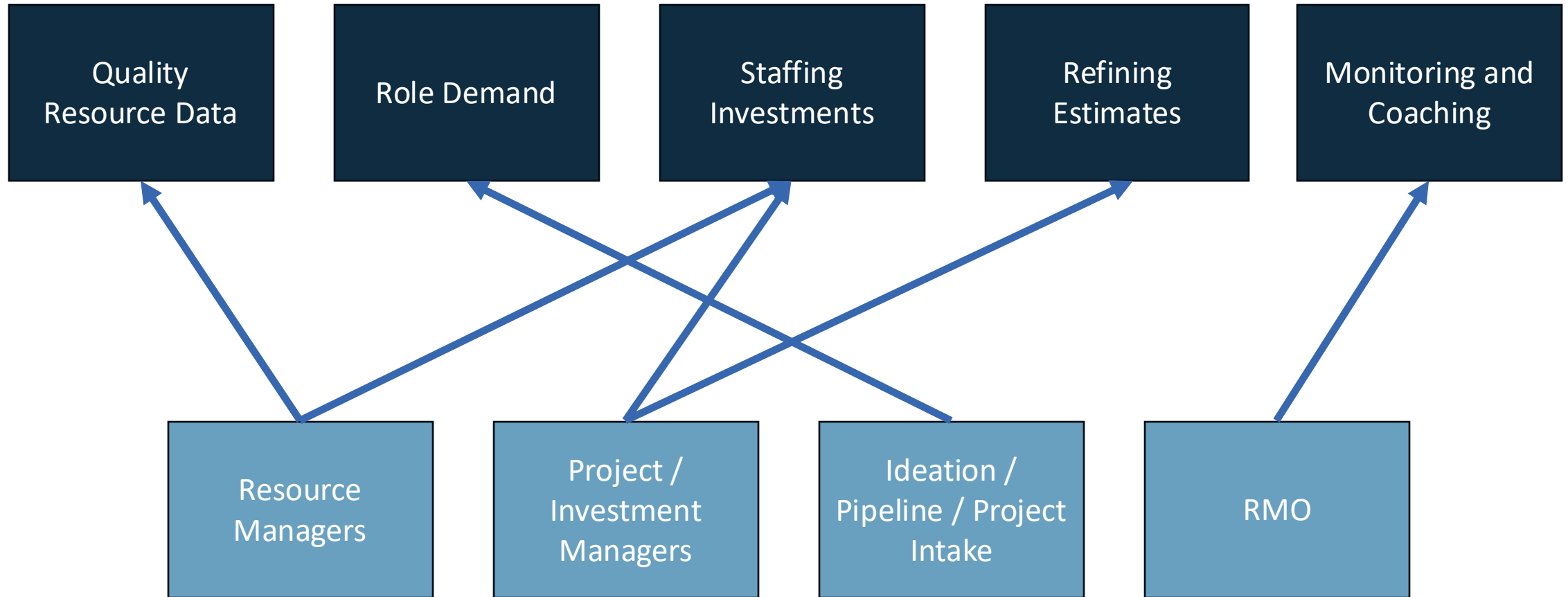
Resource Summary Mode

Group	Staffing	Staffing	Investment	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06
	Resource *	Role	Staff OBS Unit Name	Allocation Remaining Availability	Allocation Remaining Availability	Allocation Remaining Availability	Allocation Remaining Availability	Allocation Remaining Availability	Allocation Remaining Availability
> Avengers Team (9)				34.77 / 7.00 (249.45)	28.20 / 7.00 (190.35)	29.46 / 7.00 (201.65)	34.77 / 7.00 (249.45)	39.25 / 7.00 (253.80)	39.25 / 7.00 (253.80)
> BA, Bonnie (3)				1.00 / 1.00 0.00	1.00 / 1.00 0.00	1.00 / 1.00 0.00	1.00 / 1.00 0.00	2.00 / 1.00 (3.00)	3.00 / 1.00
> Baker, Gregory (1)				1.00 / 1.00 0.00	1.00 / 1.00 0.00	1.00 / 1.00 0.00	1.00 / 1.00 0.00	1.00 / 1.00 0.00	1.00 / 1.00 0.00
> Baker, Jesse (5)				4.00 / 1.00 (15.00)	4.00 / 1.00 (15.00)	4.00 / 1.00 (15.00)	4.00 / 1.00 (15.00)	4.00 / 1.00 (15.00)	4.00 / 1.00 (15.00)
> Baker, Stacey (7)				4.15 / 1.00 (22.05)	4.15 / 1.00 (22.05)	4.15 / 1.00 (22.05)	4.15 / 1.00 (22.05)	3.38 / 1.00 (16.64)	3.15 / 1.00 (15.05)
> Barnes, Howard (3)				2.00 / 1.00 (4.95)	2.00 / 1.00 (4.95)	1.00 / 1.00 (1.95)	1.00 / 1.00 (1.95)	1.00 / 1.00 (1.95)	1.00 / 1.00 (1.95)
> Bauer, Joyce (7)				4.00 / 1.00 (21.00)	4.00 / 1.00 (21.00)	4.00 / 1.00 (21.00)	4.00 / 1.00 (21.00)	4.00 / 1.00 (21.00)	4.00 / 1.00 (21.00)
> Beck, Jackson (6)				2.15 / 1.00 (6.90)	2.15 / 1.00 (6.90)	2.15 / 1.00 (6.90)	2.15 / 1.00 (6.90)	2.15 / 1.00 (6.90)	2.15 / 1.00 (6.90)
> Bennett, Aaron (7)				2.14 / 1.00 (7.95)	2.15 / 1.00 (8.04)	2.15 / 1.00 (8.04)	2.14 / 1.00 (7.99)	2.14 / 1.00 (7.95)	2.25 / 1.00 (7.95)
> Benning, Adam (5)				2.25 / 1.00 (6.25)	2.25 / 1.00 (6.25)	2.25 / 1.00 (6.25)	2.25 / 1.00 (6.25)	1.25 / 1.00 (6.25)	2.25 / 1.00 (6.25)
> Berg, Kathryn (6)				4.02 / 1.00 (18.13)	4.02 / 1.00 (18.14)	4.02 / 1.00 (18.14)	4.02 / 1.00 (18.14)	4.04 / 1.00 (18.23)	4.05 / 1.00 (18.23)
> Bergman, Alex (5)				3.00 / 1.00 (10.00)	3.00 / 1.00 (10.00)	3.00 / 1.00 (10.00)	3.00 / 1.00 (10.00)	3.00 / 1.00 (10.00)	3.00 / 1.00 (10.00)
> Berks, Paul (10)				4.00 / 1.00 (30.00)	4.00 / 1.00 (30.00)	3.00 / 1.00 (20.00)	3.00 / 1.00 (20.00)	3.30 / 1.00 (23.00)	3.30 / 1.00 (23.00)
> Berry, Jason (12)				5.00 / 1.00 (48.00)	5.00 / 1.00 (48.00)	5.00 / 1.00 (48.00)	5.00 / 1.00 (48.00)	5.30 / 1.00 (51.65)	5.25 / 1.00 (51.65)
> Bhatt, Rakesh (12)				2.10 / 1.00 (13.17)	2.99 / 1.00 (23.86)	3.75 / 1.00 (33.00)	3.75 / 1.00 (33.00)	3.75 / 1.00 (33.00)	3.30 / 1.00 (33.00)
> Black Belt (3)				2.00 / - (3.00)	2.00 / - (3.00)	2.00 / - (3.00)	2.00 / - (3.00)	1.04 / - (0.13)	1.75 / - (0.13)
> Bloggs, Joe (2)				0.00 / 1.00 2.00	0.00 / 1.00 2.00	0.00 / 1.00 2.00	0.00 / 1.00 2.00	1.00 / 1.00 0.00	1.00 / 1.00 0.00

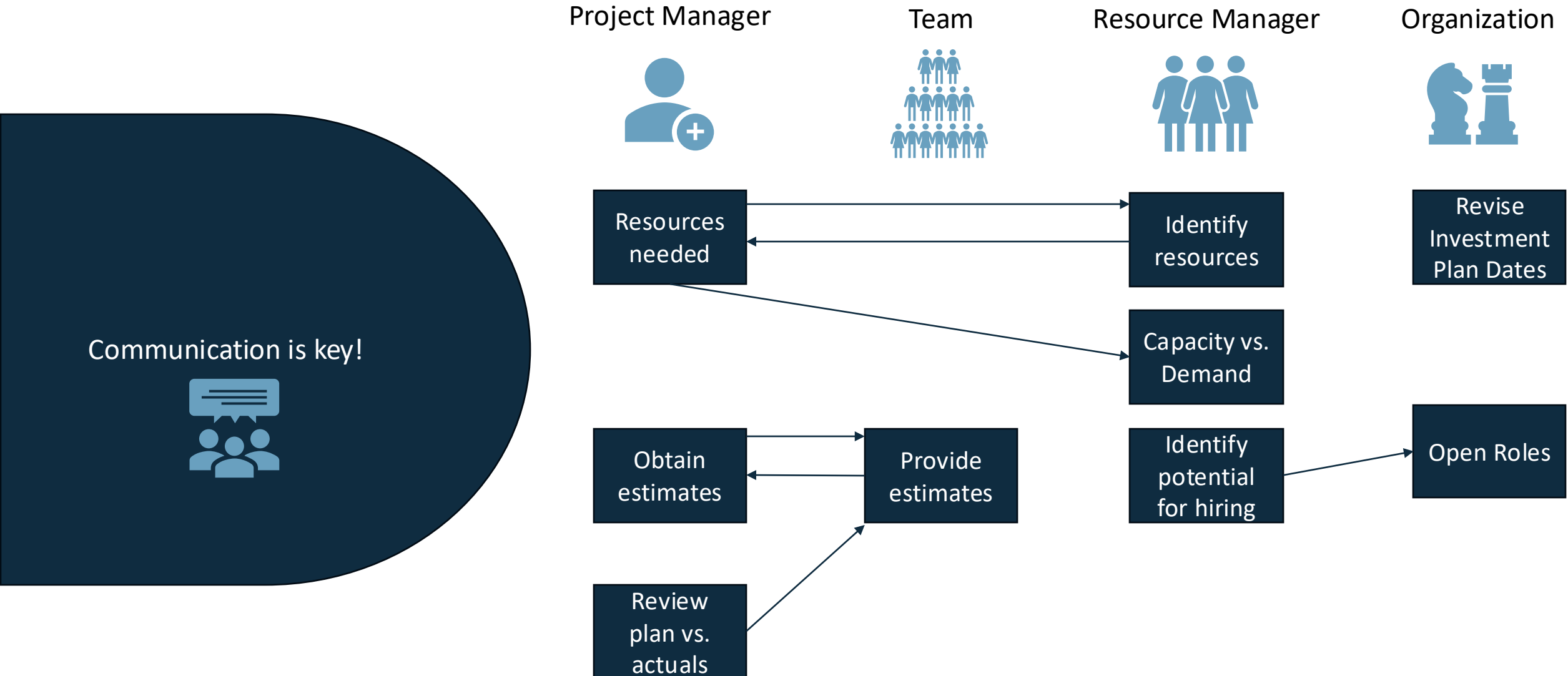
Investments can include Project, Ideas, and Custom Investments



Processes and Accountability



Communication is Key



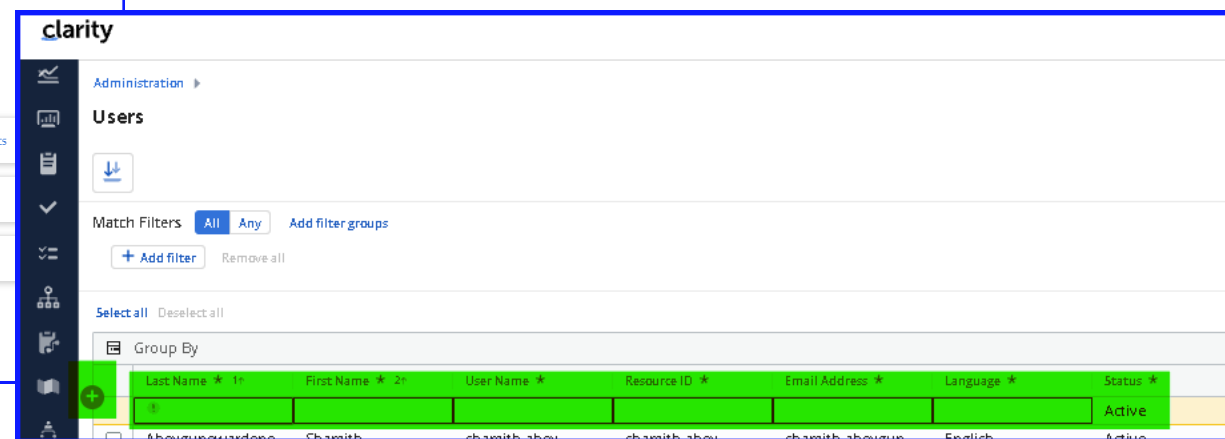
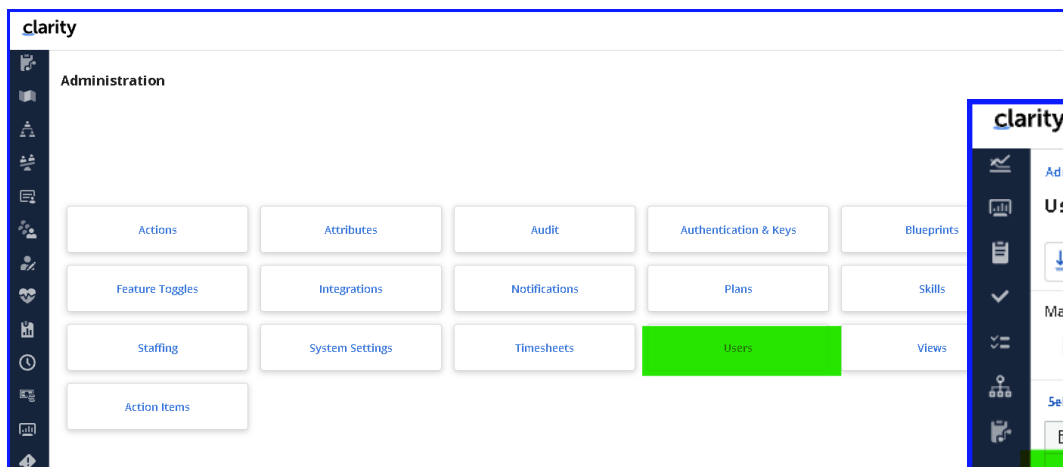
Resource Administration

- There are multiple ways of creating resources in Clarity
 - Integration with external sources
 - Active Directory, HR or ERP system (Workday, Peoplesoft) etc..
 - Manual User creation
 - Can be performed in Classic or Modern User Interface
 - When a user record is created in Clarity, a resource record is automatically created and vice-versa
 - Manual Resource creation
 - Can only be performed in Classic User Interface under the Application Menu - Resource Management - Resources.
 - The indirect way to create a resource record in MUX is to create a user record in MUX
 - When a user record is created in Clarity, a resource record is automatically created and vice-versa
 - Update the resource record in MUX
- We will primarily focus on setting up a **labor** resource in Modern UX in this session.

- A resource set up involves key data elements to manage their staffing (capacity / Availability)
 - Resource Identifiers
 - Availability Rate
 - Determines the Hours in a day that the resource is expected to be productive for the organization
 - Also known as “Availability” in Classic
 - Used to convert % allocation to hours and vice-versa
 - Date of Hire and Date of Termination (when known) to limit the availability of the resource within the timeframe
- Apart from the key data elements mentioned above, several Grouping Attributes are defined to slice and dice the staffing information
 - Examples include OBS, Primary Role, Employment Type, Manager & other key custom attributes for your organization

Setting Up a User

- In the MUX Navigation menu, Choose Administration and then Users
- Create a new row for the resource
 - Make sure all required fields are either entered or inheriting a default value.
 - Make sure the status is changed to “Lock”, so the user you created do not consume a license.
 - As we discussed earlier, when a user record is created in Clarity, a resource record is automatically created and vice-versa



Updating the Resource Attributes

- Now you can go to Resources in the Navigation Menu and edit the resource record to update the resource characteristics

The screenshot displays the Clarity application interface. On the left, a navigation menu shows the 'Resources' icon highlighted. The main content area is titled 'Resources' and includes tabs for 'Resources', 'Roles', and 'Teams'. A search bar contains the text 'arpel'. Below the search bar, there are options to 'Select all' or 'Deselect all'. A table lists resources with columns: Full Name, Resource ID, Primary Role, Manager, Person Type, and Resource Type. The first row, 'Arpel, Ian', is highlighted in green. To the right of the table, a 'Details' panel for 'Arpel, Ian' is shown, displaying fields for Full Name, Resource ID, Primary Role, Manager, Person Type, and Resource Type, all matching the values in the table. The 'Availability Rate' field is highlighted in green and shows a value of 8.00.

Full Name	Resource ID	Primary Role	Manager	Person Type	Resource Type
Arpel, Ian	admin	Business Analyst	Fowler, Ray	Employee	Labor

Arpel, Ian (admin)

Details Certifications

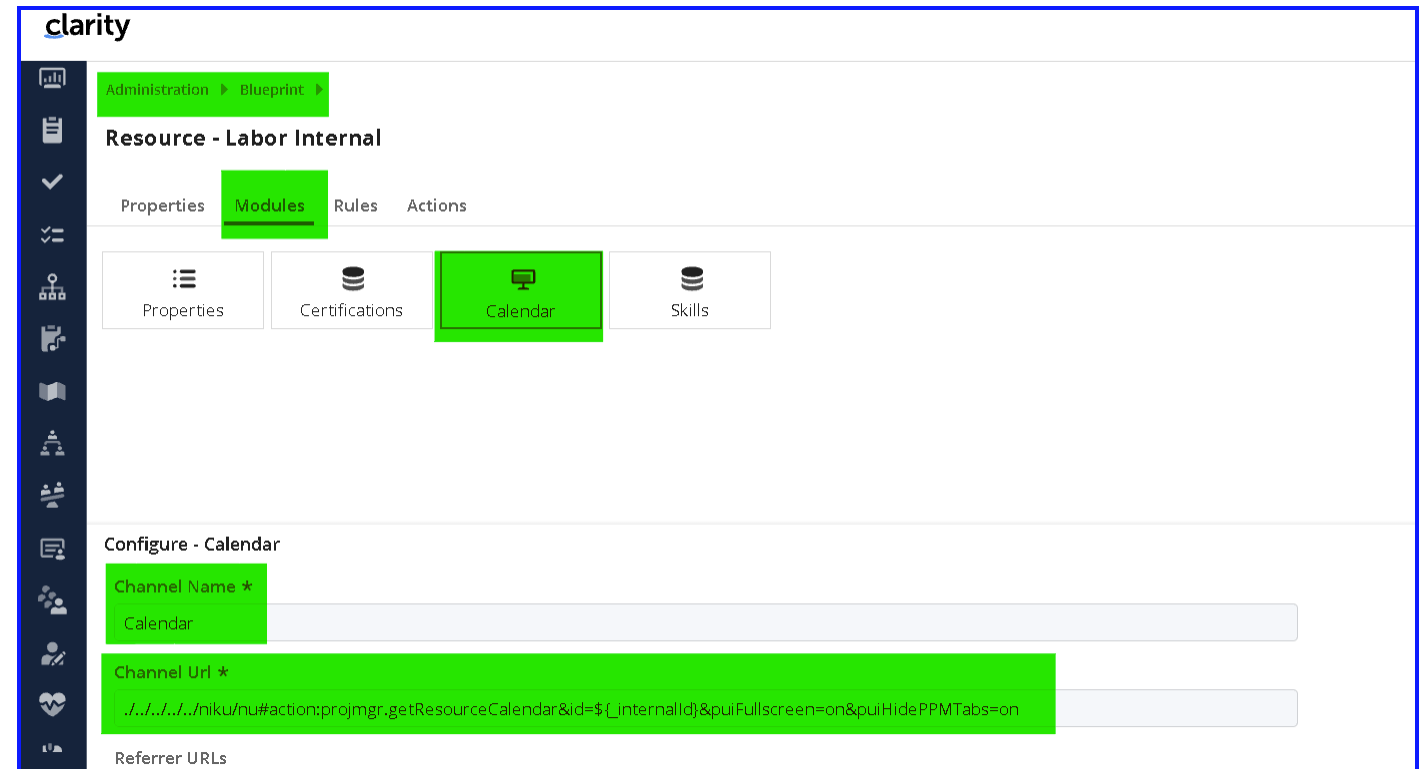
Full Name: Arpel, Ian
Resource ID: admin
Primary Role: Business Analyst
Manager: Fowler, Ray
Person Type: Employee
Resource Type: Labor
Availability Rate: 8.00

Remember – Availability Rate cannot be brought directly into the Grid view and can be accessed only through the Details section of the view.

Calendar Management

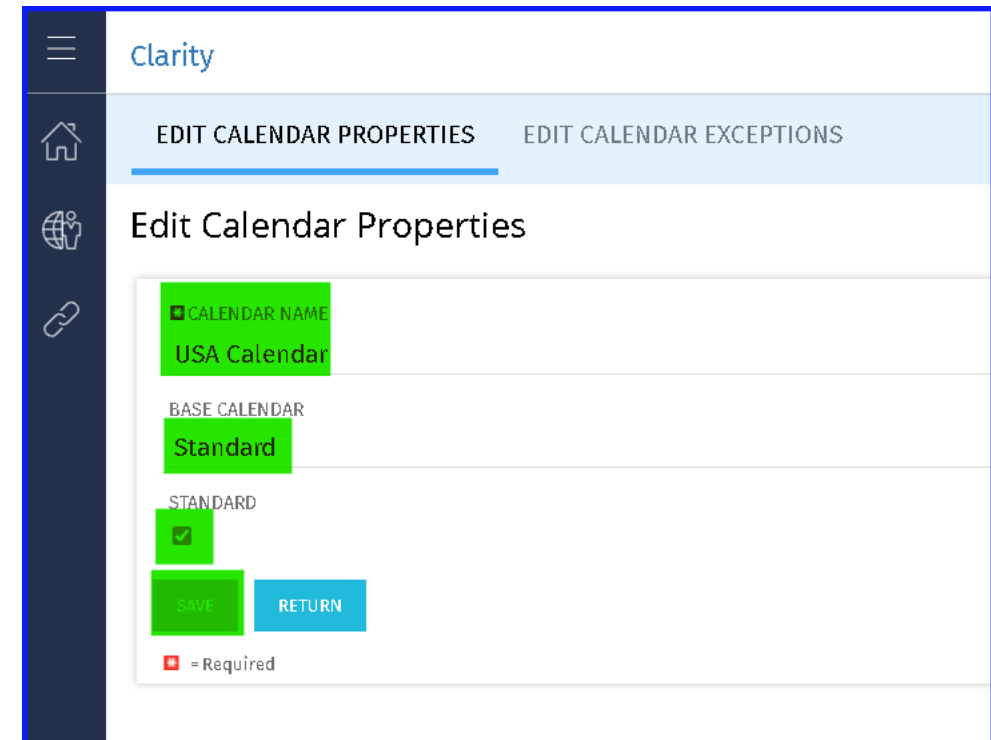
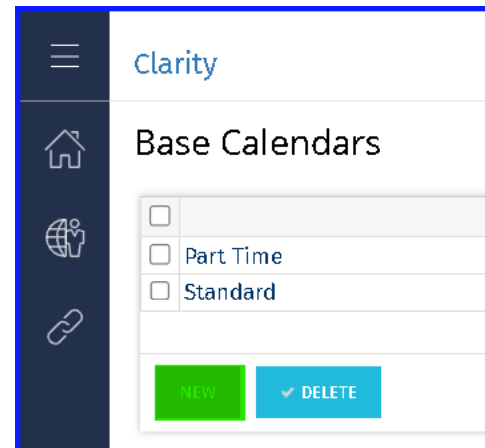
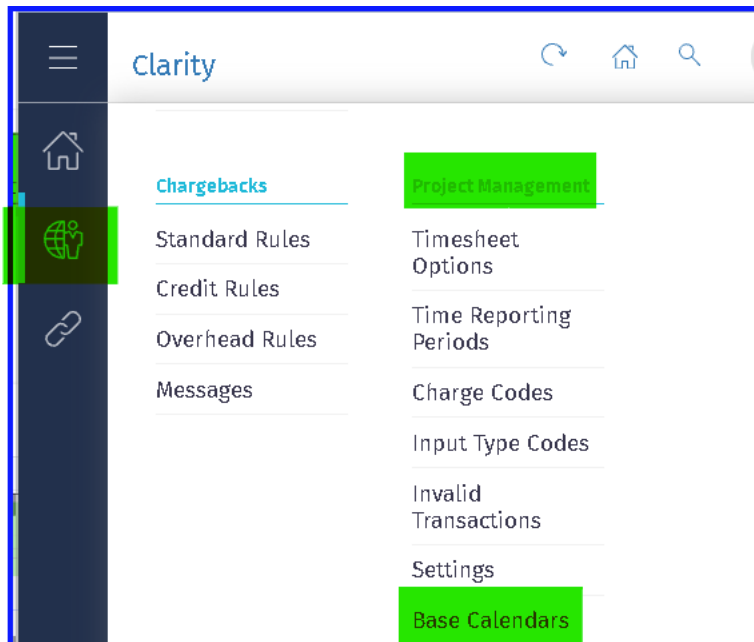
Calendars

- Calendars are not directly available in Modern UX.
- You can modify the resource blueprint in Modern UX to add a channel to Classic Calendars.
- Base Calendars are created to manage shifts and workdays.
- Separate calendars are created for different countries, as the holidays and work schedules typically differ.
- You can designate only one base calendar as the standard.
- Base calendars serve as templates for other calendars including specific resource calendars and role calendars.
- The selected base calendar for a resource or role determines their FTE when you allocate them to a project team.
- Resource calendars help calculate resource availability, capacity, demand, and allocation



Calendars

- Calendar creation and administration is done in Classic UX.



Resource Calendar Updates

- Vacation
- Training
- Other OOTO etc.
- Make Non-Workday
- Make Workday (Change Non-Workday to Workday)
- Set Shifts
- Reset Resource Calendar to Base Calendar

The screenshot shows the Clarity software interface for editing a resource's calendar. The user is logged in as 'admin' and is viewing the 'Calendar' tab for 'Arpel, Ian'. The interface includes a sidebar with various icons and a main content area. The main content area shows the 'Resource-Labor: Ian Arpel - Edit Resource Calendar' page. It features a 'Base Calendar' dropdown, a date selector for 'September 2025', and a calendar grid. The grid shows days of the week (Mon, Tue, Wed) and dates (1, 2, 3, 8, 9, 10, 15, 16, 17, 22, 23, 24). The day '3' is highlighted in green, indicating it is a workday. At the bottom, there are four buttons: 'MAKE WORKDAY', 'MAKE NON-WORKDAY' (highlighted in green), 'RESET TO BASE', and 'SET SHIFTS'.

Teams

Investment - Staff

- Resources are allocated to an investment to ensure the right skills are available at the right time to support successful delivery of planned work and outcomes.
- Allocate labor/non labor, roles or teams
- This enables resource managers and investment managers to plan and track staffing in terms of:
 - Availability:** Capacity of resource.
 - Allocation:** The portion of that time assigned to the investment.
 - Assignments:** Specific tasks or components where the resource is engaged.
 - Actuals:** Hours recorded by the resource against assigned tasks.

Acme Managed Services

PR2093

Needs Help

Properties

Staff

Checklists

Financials

Status

Issues

↓

Add Staff

<

Per-Period Metrics - 2 Periods

>

🔍

📄

Unfilled Roles

2

Role Mix

-

Allocation Hou...

30.38K

ETC Hours

29.37K

Select all

Deselect all

📅

Group By

Staffing			Grand Totals				2025		
Resource ★ 2↑	Role 1↑	Finish	Default Allocati...	Alloc...	Availability	Actuals	Alloc...	Availability	Actuals
<input type="checkbox"/> Architect	Architect	Dec 30, 2026	100%	3,814	374,480	0	1,734	2,088	0
<input type="checkbox"/> Ramos, Adriana	Architect	Dec 30, 2026	50%	2,952	163,680	45	1,044	2,088	0
<input type="checkbox"/> Engineer	Engineer	Dec 30, 2026	100%	5,904	374,480	0	2,088	2,088	0
<input type="checkbox"/> Ives, Blair	Engineer	Dec 30, 2026	100%	5,904	163,680	344	2,088	2,088	184
<input type="checkbox"/> Patel, Deepak	Engineer	Dec 30, 2026	100%	5,904	151,160	304	2,088	2,088	144
<input type="checkbox"/> Sutherland, Joy	Engineer	Dec 30, 2026	100%	5,904	163,680	160	2,088	2,088	0

Teams Investment– Introduction

- Strategic investment entities, aligning with modern, people-centric planning
- Enables organizations to fund teams directly
- Prioritize strategic outcomes over project-based structures..
- Teams can be allocated to investments
- Resources are allocated to teams (Typically 100%)
- This allocation affects availability regardless of whether the team is assigned to a project.
 - For example, if John is 40% allocated to “Team All Stars” and 25% to “Project Wonderful”, his remaining availability is **35%**, even if the team isn’t on a project.

Team Investment

[Actions](#) ▼

[New from Template](#)
[Select all](#) [Deselect all](#)

Group By			
	Name * ↑	Investment ID *	Manager
<input type="checkbox"/>	AI Team	TM00001	Arpel, Ian
<input type="checkbox"/>	Blackhawks Team	TM00005	Arpel, Ian
<input type="checkbox"/>	Business Digital Team	TM00025	Calderon, Mindy
<input type="checkbox"/>	cloud team	TM00019	Bajjuri, Naresh
<input type="checkbox"/>	Crushers Team	TM00006	Arpel, Ian
<input type="checkbox"/>	Digital Team	TM00002	Arpel, Ian
<input type="checkbox"/>	Global Delivery	TM00012	Arpel, Ian
<input type="checkbox"/>	Integration Team	TM00013	Arpel, Ian
<input type="checkbox"/>	Jaguars Team	TM00007	Arpel, Ian
<input type="checkbox"/>	Jira Team	TM00014	Arpel, Ian
<input type="checkbox"/>	Legal	TM00010	Arpel, Ian
<input type="checkbox"/>	M&A Team	TM00009	Arpel, Ian
<input type="checkbox"/>	Mobile Team	TM00003	Arpel, Ian
<input type="checkbox"/>	Nighthawks Team	TM00008	Arpel, Ian
<input type="checkbox"/>	Operations	TM00011	Arpel, Ian
<input type="checkbox"/>	Security Team	TM00004	Arpel, Ian

Creating Team Investments

- Teams are created as custom investments (similar to a project or idea) available in Modern UX, but they come under a special category called “Team Type Investment”
- When a custom investment is created as “Team Type Investment”, they show up under “Teams” Navigation menu/icon in Modern UX
- You can create several new custom “Team Investments” in Modern UX, but our session will focus primarily on utilizing a simple example of “Team Investment”, which comes out of the box

Object: Team Investment - *Properties*

COPY ENABLED
☐

EXPORT ENABLED
☐

VIEW ALL ENABLED
☐

TEMPLATE ENABLED
☒
{ Once the value is enabled, it cannot be disabled. }

INCLUDE IN ROADMAPS
☐

→ INCLUDE IN HIERARCHIES
☐
{ Once the value is enabled, it cannot be disabled }

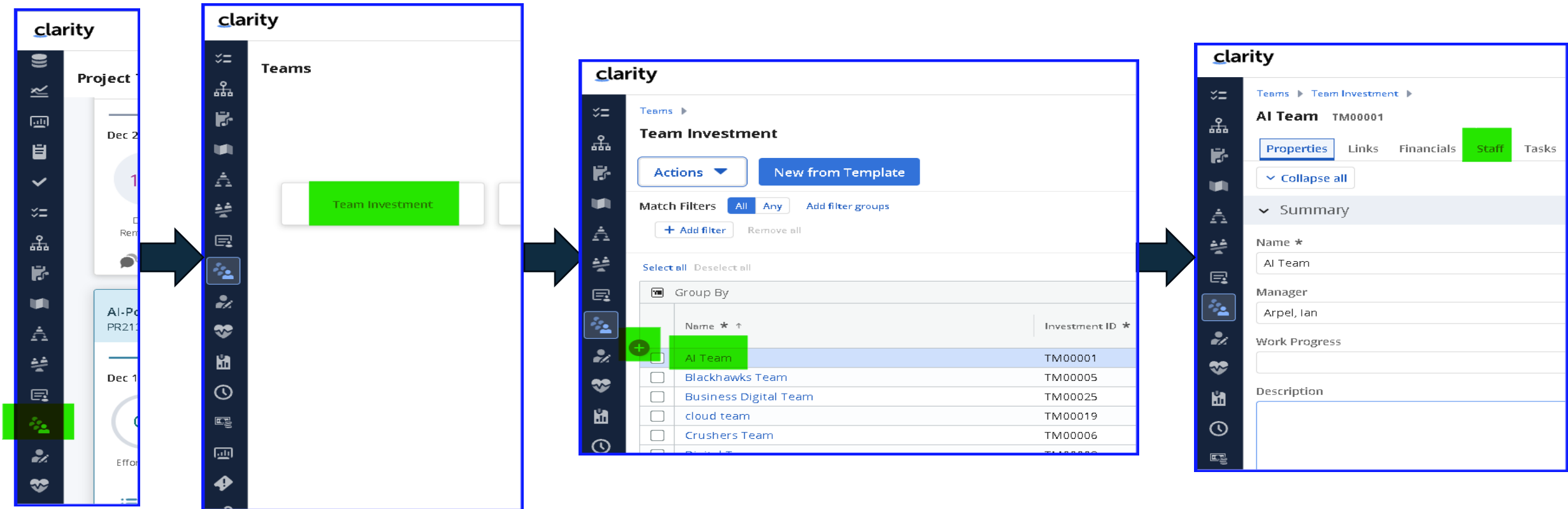
→ TEAM TYPE INVESTMENT
☒
{ If this object has investment records, this value is read-only }

OBJECT EXTENSION
Investment Extension

☒ = Required → = Enter Once

SAVE SAVE AND RETURN RETURN

Setting up a Team



You can create a new team by navigating to Teams -> Team Investment in Modern UX and clicking on the “+” sign and providing the team’s name. If the ID is auto-numbered, none of the other fields are mandatory, unless you have defined mandatory attributes for investments in your environment.

Adding Resources to a Team

- You can add Staff to the Team just like how you allocate resources to a project
 - start, finish, allocation (% , hours etc..)
- As this is an investment, you can configure the blueprint for “Team Investment” with modules like risks, issues etc..

Teams ▶ Team Investment ▶

AI Team TM00001

Properties Links Financials **Staff** Tasks Assignments Risks Issues

↓ Add Staff < Per-Period Metrics

Select all Deselect all

☒ Group By

Staffing			Staffing	Totals	2025-08	2025-09	2025-10
Resource *	Role	Finish	Default Allocati...	Allocation	Allocation	Allocation	Allocation
<input type="checkbox"/> Morris, Tom	Architect	Sep 30, 2025	75%	256	126	130	0
<input type="checkbox"/> Turner, Bruce	QA	Aug 31, 2025	50%	84	84	0	0
<input type="checkbox"/> Patel, Sid	Engineer	Oct 31, 2025	100%	526	168	176	182
<input type="checkbox"/> Fleming, Nicole	ML Engineer	Jan 16, 2026	100%	528	168	176	184
<input type="checkbox"/> Lewis, Paul	Product Owner	Dec 31, 2025	100%	528	168	176	184
<input type="checkbox"/> Hudson, Barb	Business Analyst	Jan 16, 2026	50%	264	84	88	92
<input type="checkbox"/> Miller, Veronica	Security Architect	Jan 16, 2026	15%	79	25	26	28

Access Rights

Ensure that the following access rights are enabled for Team Investments:

- Team - Navigate – gives the right to access Teams menu/icon in MUX
- [Team Investment Name] - Create
- [Team Investment Name] - Edit All
- [Team Investment Name] – Navigate – gives the right to access the “Team investment” button inside the Teams menu
- [Team Investment Name] - View All – gives the right to view the Team Investment instances.
- You can assign rights for each sub objects (like risk, issues **if they are relevant**)
- In our example, [Team Investment Name] is “Team Investment”
- Ignore the following legacy access rights
 - Team - Create
 - Team - Delete - All
 - Team - Edit - All
 - Team - View - All

Best Practices

- Resource
 - Define Availability Rate accurately
 - 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
 - Calendar
 - 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)
 - Teams
 - Leverage Team Investment to allocate resources to the teams to reflect reality
- Remember – managing resources does not consume a license per resource
 - Consider automation for Resource data

Questions?





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✓ **Eligibility:** Open to all Rego University attendees



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To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

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



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- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **Rego University**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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