



# Annual Planning Workshop Login Procedures

- Login to PC as yourself:
  - Username = IAM login
  - Password = enter your password
- Run the Default Registry (Clarity Open Workbench)
  - K:\InfoTech\Internal Services\PMO\PM\Clarity\Claritydefaults-win7.reg
- Login into Clarity Production
  - ppm.oakgov.com

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## **Annual Planning Workshop Agenda**

- Supervisor Planning Packets
- Review New Project Plan Files
- PMO Handbook – Section 11 Master Planning
- Reports and Portlets
- Annual Planning Time Line
- Updates
- Opportunity to Work on Plan Files



# Annual Planning Workshop

## Reengineered Plan Files

- 2018-19 Plans Reengineered
  - Non-Project
  - Team Management
  - Customer Support
  - System Maintenance

Note: Total Usage (ETC + Actuals) through 04/26/19

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# Annual Planning Workshop

## Supervisor Planning Packets

- Current Plans
  - Online Packets Prepared
    - Clarity Project – DH1010QC Quarterly Mgmt Review Collaboration
    - Collaboration Folder – Annual Supervisor Planning Packets/2019
- Clarity Open Workbench Views
  - Actuals/Estimates to prep New Plans
  - Tasks, ETC and Actuals through 04/26/19
  - Approximately 7 months through plan year

## **Annual Planning Workshop Review New Project Plan Files**

- 2019-20 Team and Non-Project Plans
  - Populated with tasks from 2018-19 Team and Non-Project plans
  - ETC = Current Year Total Usage (ETC + Actuals) through 04/26/19
  - Importance of Estimating the Annual Work Effort
  - Only remove inactive resources from the project once the ETC = 0
  - Only add Roles for vacant positions approved to fill
    - Exception for Planned Maintenance & Upgrades
    - Be accurate with the Roles you assign
    - Assign Team OBS for Roles

## Annual Planning Workshop Allocations

- ***Default Allocation Percent*** will be identical to last year's plan. Adjust so that ***Allocation Hours*** are approximately equal to ***Total Usage***.
  - FTE - Total Usage / 1743 hours (249 business days \* 7 hours/day) = DA%
  - Contractor - Total Usage / 1992 (249 business days \* 8 hours/day) = DA%
- Remove all Resources with 0 ETC.
- ***Allocation Segments*** can be set for cyclical work.
- Resources from your team will be hard-booked on 8/01/19.

# Annual Planning Workshop PMO Handbook

- Section 11 – Master Planning
  - Annual Team and Non-Project Planning
  - Team Plans
  - Loading Pattern – Uniform vs. Fixed
  - Average Trends Across Department
  - Implementation Schedule
- Section 2 – Project Planning
  - Project Time Calculation – Page 2.22 (validate every 2 years; may change)
- Appendix G – Definitions

## **Annual Planning Workshop Annual Planning Time Line**

- May 3                      Packets Distributed
- June 28                    Plans Completed
- July 15 & 16              Management Review
- July 26                    Final Changes to Plans
- August 1                   Plans Baselined
- September 26            Plans Re-Baselined
- October 1                Time Tracking Begins

## Annual Planning Workshop Portlets

- Role Capacity vs Demand
  - Resource Management/Resource Planning/Role Demand & Role Demand by Project
  - Defaults to Master Plan Dates, all approved IT Projects (Project OBS = IT, Stage Identifier = Analyze)
  - Filter on Resource OBS to see your own team
  - Shows all work assigned to both actual Resources and generic Roles
  - Compare ETC (Demand) to Availability (Capacity)
  - Availability is calculated as-of today's date. Includes all actual Resources in-house. Does not include Resources to-be-hired.
  - Includes hours assigned to Scope and Contingency
  - Includes hours assigned to EBs and other budgets
  - Hours in the Roles without Team OBS portlet are not included

# Annual Planning Workshop Portlets

- Weekly Detail
  - Resource Management/Resource Planning /Weekly Detail
  - Filter on Resource OBS to see your Team
  - Filter on Resource to see a specific Resource
  - Timescale = 2 weeks in the past, Current Week and 7 Future Weeks
  - Compare Baseline Usage (planned work) to Total Usage (Actual Work)

# Annual Planning Workshop

## Updates

- Supervisor Planning Packets
- Team Group Plans
- Clarity Timesheets
  - Performance
  - Filters
  - Functionality
  - Training / Education
  - Roll Back to Previous Version or Dual Timesheet Option

# Annual Planning Workshop Questions

Time Tracking for this Workshop

- FTE – Training Task
- Contractors – Tracking & Control in Team Mgt Plan

Additional Questions

Time allowed to work on your plan files

