

# \_\_\_\_\_Clarity Recommendations



**rego**consulting

- Rego Consulting Information
- Recommendations
- Examples Screenshots
- Effort Estimates

- **CA Clarity/PPM Configuration and Implementation Projects**

- Types of Projects:
  - Installations
  - Upgrades
  - Functional Expansions
  - Business Process Re-engineering – PPM Process Rework
  - Structured Training or PM Mentoring (one-on-one)
- Types of Configuration Work
  - Develop objects and fields to support client data collection and management needs
  - Create meaningful portlets
  - Develop workflow processes to automate and enforce PPM processes
  - Build reports for distribution of information to users outside of CA Clarity.
  - Train internal support staff to ensure the effort can be supported after the project is complete

- **Project Management Mentoring/Support**

- Project managers are a key user group in a successful deployment, and often companies do not dedicate the resources required to help PMs. We provide project management experts who understand the principles and skills needed to effectively manage projects with CA Clarity. Our resources have years of experience managing large complex programs and projects; they can relate to and motivate internal project management resources to see the importance of an automated solution. We will help improve the effectiveness of scheduling projects who use:
  - CA Clarity and MSP
  - CA Clarity and Open Workbench
  - CA Clarity – scheduling in the browser

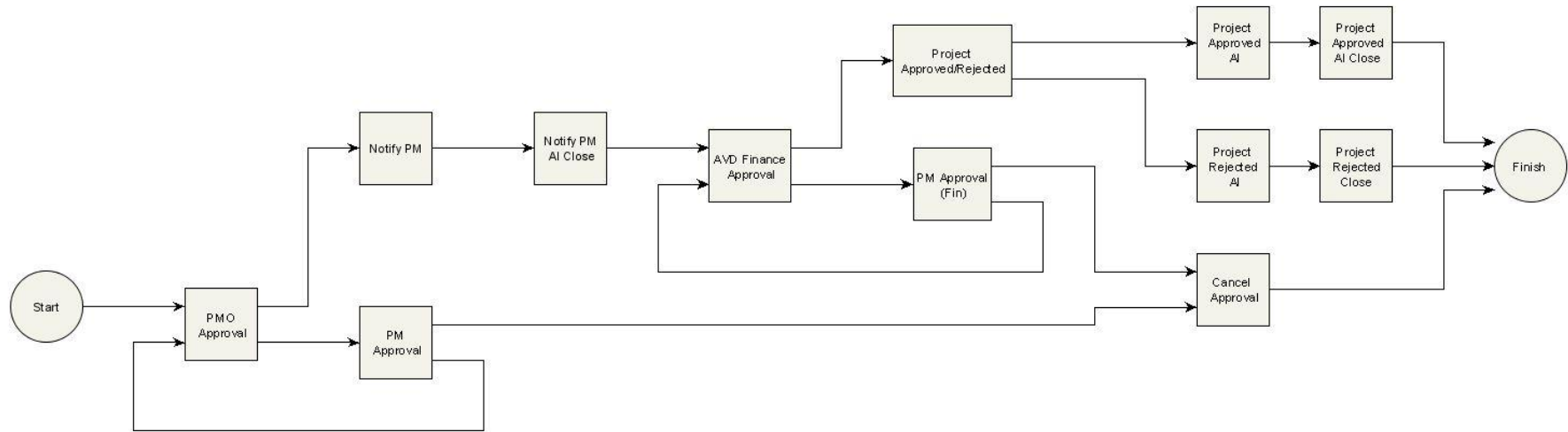
- **CA Clarity Support Services**

- Some companies cannot afford to staff CA Clarity experts internally or they just need help at peak time for CA Clarity support. In those cases, we provide remote ongoing maintenance and support of your Clarity installation at a price that is cost effective. Outsourcing some of the “normal” tasks for Clarity support gives firms the flexibility to deploy internal resources on higher value-add tasks while still reducing the overall cost of maintaining the application. By outsourcing the support services to Rego Consulting, firms will receive the benefit of highly skilled Clarity configuration resources who have expertise in configuration as well as Clarity usage. Our Clarity support services include:
  - CA Case management
  - User questions and issue diagnostics
  - Small enhancements
  - User administration
  - Upgrade installation and testing

- **Our Resources:** Our resources have both consulting and practical experience. They have managed large resource teams, tracking planned and unplanned work for their groups. They have analyzed estimates and time related to their resources to perform resource planning. They have also managed both small and large projects using various automation tools. They know what features and functions will work and be accepted by organization leaders. They have led successful change efforts.
- **Our Focus:** We have a strong engagement focus on 3 things:
  1. Lasting Change - A strong emphasis on lasting change management instead of just technical implementation
  2. Usability – With our background as PM/RS users, all views/screens and processes focus on what will really work once deployed.
  3. Self Reliance - Mentoring and training within the user support and the technical support team to ensure stability and success.
- **Our Size:** We are a small boutique firm focusing on targeted engagements. This enables us to keep overhead very low and price our engagements at 30-50% lower than large CA Partnered solution providers who have fixed rate agreements with CA. We also are able to re-use many of the portlets and processes we have already built, allowing us to produce these things in less time than other providers.

- LDS Church – Complete deployment for 600 users of project management, resource management, product management. Addition of 20+ custom objects, addition of 50+ queries, addition of 60+ portlets, addition of 30+ processes.
- LL Bean - Complete deployment for 150 users of time, project management, resource management, applications. Addition of 3 custom objects, addition of 10+ queries, addition of 30+ portlets, addition of 3 processes.
- JD Irving – Complete deployment for 250 users of time, project management, resource management, help desk, assets, applications. Addition of 5 custom objects, addition of 20+ queries, addition of 40+ portlets, addition of 20+ processes.

Target Area	Description	Timing	Examples Attached
User Training	<p>Develop a set of web based training material that can be used globally for your instance of Clarity. From the time we spent, I know of three types of training needed:</p> <ul style="list-style-type: none"> <li>• General user training – Clarity overview and navigation, managing filters, configuration of portlets</li> <li>• Executive training – Clarity overview and navigation, managing filters, looking at specific views and what they mean</li> <li>• Project manager training – Clarity and MSP interaction, managing tasks, process, and using the new portlets</li> </ul>	Soon	Yes – Separate File
Project Approval Workflow	<p>Create a workflow process to receive project approval, lock an “approved ship to trade” date, create a field to track the difference between the current ship to trade and the approved ship to trade with a R/Y/G icon associated. This new process will then require a portlet for tracking process action items by the end user and training material related to responding to an action item.</p>	Soon	Yes
Tips and Tricks for Users	<p>Create a new object to allow the group to manage a list of tips and tricks, including a name, active/not active, description, and attached file. This new object could have a submit action that sent emails to all, or the group could send out a manual email with the attachment.</p>	Soon	Yes
PMO Portlet views	<p>Develop a set of portlets to assist the central group in understanding: 1) where projects are within the overall lifecycle ; and 2) Are the project managers keeping their project information current. Some specific portlets we suggest include:</p> <ul style="list-style-type: none"> <li>• Workload View showing the number of projects by PM or by Product</li> <li>• A validation view by project manager showing one line per project manager with # of projects, # R/Y/G, # with old tasks (open tasks where the finish date is over xx days in the past), # where shift to trade is later by xx days then approved, etc</li> <li>• A progress view listing one line per project with the major milestones as columns – showing how far that project has progressed overall (vs. just the stage set at the project level)</li> <li>• A project dashboard view within a project to see project information, risks, status, milestones, financials, etc.</li> </ul>	Soon	Yes
PM Portlet Views	<p>Develop a set of portlets to assist the project managers and resource managers to manage their tasks and assignments more efficiently. Some specific portlets we suggest include:</p> <ul style="list-style-type: none"> <li>• A view of all tasks the project mangers have access to across all projects – allowing them to filter on the manager, the date range the task was supposed to finish, and the task status. This can be used by the PMs to put the portlet in edit mode and close tasks across all projects each week within one portlet vs. opening up each of the 30+ project plans individually and editing the status of the tasks.</li> <li>• A view just like the one above, except we would pre-filter to show just those tasks that are “old” as defined by tasks where the finish date is in the past and the task status is not closed. This shows that the PMs need to either close those tasks because they are complete or reschedule the plan to move the dates into the future.</li> <li>• A view similar to the task view for project managers, but this view would be for Assignments to allow the PMs to manage all assignments across all projects.</li> <li>• A view for the resource managers to allow them to see all assignments for their staff that are supposed to finish within a given time frame or those assignments that have a finish date in the past.</li> </ul>	Soon	Yes
Administration Training	<p>In order to become more self-sufficient in the future, train the GIT clarity administrators on how to create portlets, create queries, create workflows, and create jobs. We recommend some training of these individuals so they can continue to maintain and enhance your instance.</p>	Soon	
Complexity Matrix in Clarity	<p>Convert the currently developed spreadsheet for calculating a project’s overall complexity into Clarity fields/objects. You would add fields to the project object using custom lookups, then put those new fields on a new project object subpage. Once the fields are filled in, you would need a calculated attribute that produced the overall complexity and put that H/M/L value on the project.</p>	Later	Yes
Project Status Reports	<p>Currently, PMs will change an overall project indicator to show R/Y/G for the project. At some point, you may want the PMs to submit a more detailed status report with R/Y/G indicators and descriptions for different areas within the project – scope, schedule, budget, and overall. Then they could retain and track the history of the status of the project.</p>	Later	Yes
Resource Management	<p>Implement Utilize the out-of-the box views of resource management to track overall capacity, hard and soft bookings, and actual/forecasted utilization. In addition, create one portlets to track overall allocation (do RMs have their resources allocated at least 70%)</p>	Later	Yes

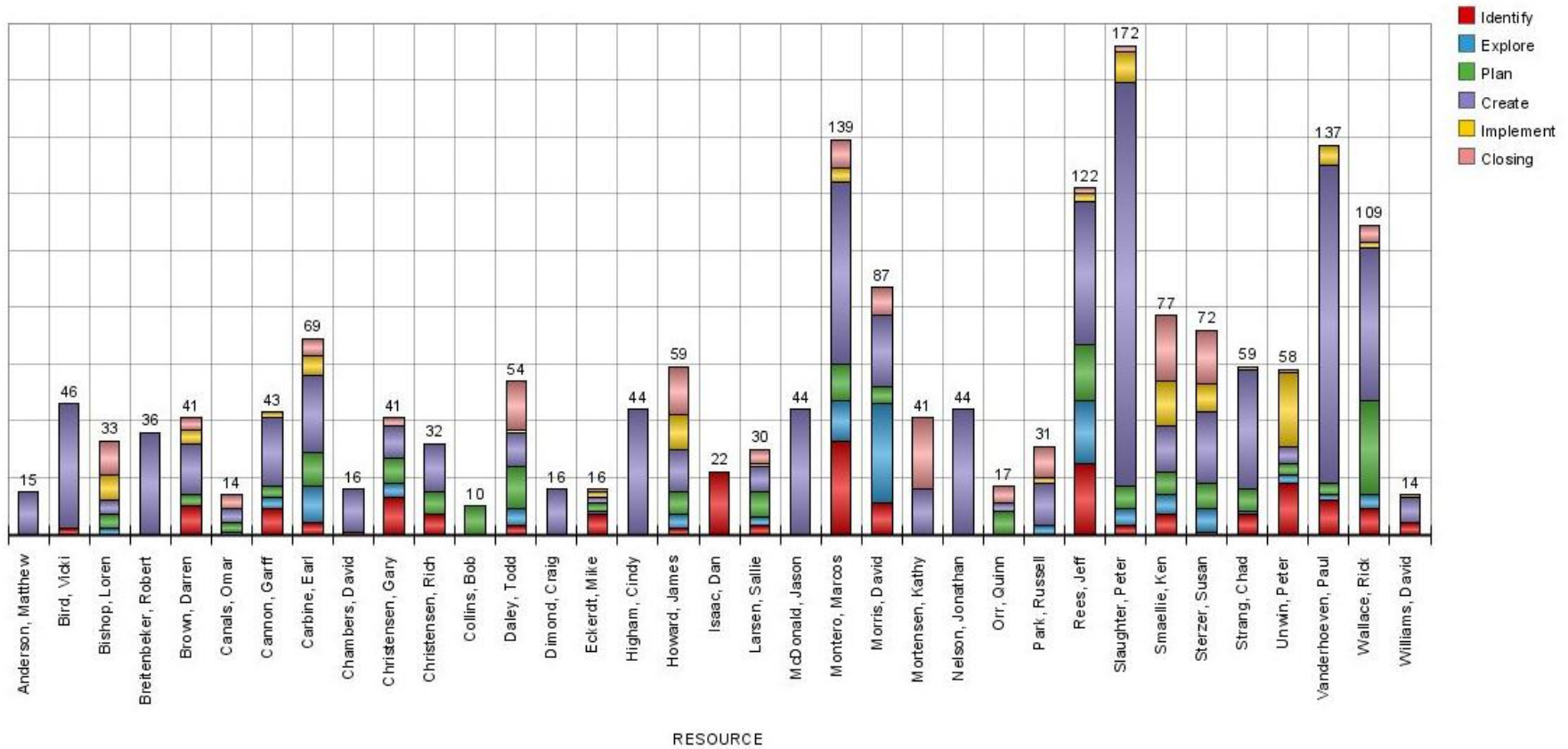


- Create a workflow process to manage the project approval process – getting electronic approvals to move forward and locking key dates.

News				
Filter [--Select--]				[--Actions--]
OBS Unit		News Category All		
OBS Unit Filter Mode Unit only		Active All		
Name				
Filter Show All Save Filter Clear				
New Delete				
Active	Created Date	News Category	Description	
<input type="checkbox"/>	4/6/09	Time	Printing Timesheets: A Clarity timesheet can be printed directly from the browser. To Print a Timesheet - 1. With the timesheet displayed in the browser, click Printable Version (upper or lower right corner of the timesheet). 2. In the new window that opens, use the standard browser Print button (or File -> Print) to print the read-only version of the timesheet. Note - the printed version will contain no Notes, Mail To links, commands, or check-boxes.	
<input type="checkbox"/>	4/6/09	Time	To Delete a Timesheet Task: 1. From within the timesheet, check the box on the appropriate Task Line. 2. Click the Delete Button. Note: Tasks deleted from the current week's timesheet will not appear on next week's timesheet unless work is scheduled for that task during that week. Also, deleting a Task does not affect resource assignment to the task in the project plan; it is only for the sake of working with the timesheets	
<input type="checkbox"/>	4/6/09	Project	Changing Task Dates: Task start and finish dates are driven by resource assignment dates. The earliest assignment date on a task becomes the task start date. The latest assignment end date becomes the task finish date. In order to change a task start or finish, assignment dates must be changed. Note: Once an assignment has time posted to it, the start date for that assignment is locked and cannot be changed unless the timesheet is adjusted.	
<input type="checkbox"/>	4/6/09	Personal	Required Fields: In Clarity, required fields are marked by a red square icon next to the attribute name. Fields that must be unique are indicated by a blue square icon. Fields that are entered only once (such as record id numbers) are indicated by a green square icon. If a required field is missed prior to the saving of a record, an error message will appear indicating that a required field is missing. The field will be highlighted with a yellow triangle.	
<input type="checkbox"/>	4/6/09	Project	Locked Projects: When project managers have their plans checked out from Clarity into Microsoft Project, the project in Clarity becomes "Locked" from change for all other users. A "Locked" icon will appear at the top of the project indicating who has the project locked. If it is necessary to access the project immediately, contact the resource who has locked the project. Otherwise, wait until the project becomes unlocked. If the project was locked in error, the project manager or Clarity administrator can manually unlock the project by clicking the "Unlock" icon.	
<input type="checkbox"/>	4/5/09	Project	Adding Links to Projects: Project managers and project team members can add project related links to their Clarity projects by accessing the project links function. To add a project link - 1. Access the project properties screen. 2. Click on the actions drop down in the upper right corner of the project properties page. 3. Select Links. The project Links screen appears. 4. Click New. 5. Enter a Link Name and Link URL. 6. Click Submit.	
<input type="checkbox"/>	4/5/09	Project	Adding Notes to Projects: Project managers and project team members can add project related notes to their Clarity projects by accessing the project notes function. To add a project note - 1. Access the project properties screen. 2. Click on the actions drop down in the upper right corner of the project properties page. 3. Select Notes. The project Notes screen appears. 4. Click New. 5. Enter a Note Category (not required) and Note Text (required). 6. Click Submit.	
<input type="checkbox"/>	4/5/09	Personal	Toggle Navigation Visibility: The main (left) menu in Clarity can be hidden in order to provide more information on the user's workspace. To toggle the left menu on/off - 1. Access the toggle icon from the Global Tools menu in the upper right corner of Clarity. 2. Click this icon to hide or show the side navigation bar as desired.	
<input type="checkbox"/>	4/4/09	Personal	Viewing Audit Records: To view an audit record for any object - 1. Navigate to the object. For example, to view the audit data for a specific project, select Projects from the Project menu and open the project from the list. 2. Click the Audit tab. Changes to any audited attributes (fields) are displayed by name, operation, who made the change, the field's old and new values and when the change was made. 3. Filter or browse to narrow your selections.	
<input type="checkbox"/>	4/4/09	Personal	Clarity User Interface: The main menu of Clarity is on the left side of the application. It is organized into menu sections (such as Personal, Training, etc.) and each menu section has one or more menu links. Each of the menu links are made up of one or more pages. Pages in Clarity contain data sections known as portlets. A page can contain one or more portlet and can display portlets differently based on admin or user configuration.	
<input checked="" type="checkbox"/>	4/3/09	Personal	Viewing Action Item List and Details: From the main menu, under Personal, select Organizer. The Organizer: Action Items page appears. Each of the action items assigned will be displayed in due date order. The type of action item, who assigned it and its status will display as well. A check mark in the Is Proxy column indicates if the person assigned to the item was assigned by proxy. A check mark in the Is Escalated column means that the action item has been escalated from someone else. The colored icons in the last column indicate whether the action item is on time. Red = overdue, and Green = on schedule.	

Active News	
Filter System Default	
[Expand Filter]	
Name	Description
Clarity Tip of the Day	Viewing Action Item List and Details: From the main menu, under Personal, select Organizer. The Organizer: Action Items page appears. Each of the action items assigned will be displayed in due date order. The type of action item, who assigned it and its status will display as well. A check mark in the Is Proxy column indicates if the person assigned to the item was assigned by proxy. A check mark in the Is Escalated column means that the action item has been escalated from someone else. The colored icons in the last column indicate whether the action item is on time. Red = overdue, and Green = on schedule.
Total Results: 1	

- Note: The object would allow you to show all historical tips and tricks or just show the one for this month/week. You can add description, name, date, and attach a file for training on that tip.



- Note: You can create a view all # of projects by manager or product.

Project Manager^	Total Projects	Missing Prod/Serv Entries	Missing Task Entries	Missing Corr. Appr (Eng. in Plan)	Missing Corr. Appr After Plan	Proj Prod w/o Corr Lang Prod	Missing Appr Dates
Anderson, John	2	0	0	0	0	0	0
Anderson, Matthew	10	0	0	0	0	0	0
Ashcraft, Loren	3	0	0	0	0	0	0
Benites, Belisario	3	0	0	0	0	0	0
Bishop, Loren	12	1	11	6	3	0	0
Brown, Darren	3	0	0	0	4	0	1
Canals, Omar	14	2	2	0	0	1	0
Cannon, Garff	31	4	2	0	0	6	0
Carbine, Earl	21	2	2	2	3	9	0
Chambers, David	15	0	0	0	0	0	0
Christensen, Gary	39	20	25	0	0	14	0
Christensen, Rich	5	0	0	1	0	0	0
Collins, Bob	6	0	0	0	0	0	0
Daley, Todd	47	0	0	1	3	3	0
Eckerdt, Mike	19	0	0	0	0	0	0
Elder, Denny	2	0	0	0	0	0	0
Greer, Dan	1	0	0	0	0	0	0
Hill, Robbin	3	0	0	0	0	0	0
Howard, James	49	14	48	18	2	34	0
Isom, Jeff	1	0	0	0	0	0	0
Larsen, Sallie	23	2	19	3	1	9	0
Lindsay, Brad	1	0	0	0	0	0	0
Loewer, Aaron	1	0	0	0	0	0	0
Luker, William	1	0	0	0	0	0	0
Mataoa, Remi	8	0	0	0	0	0	0
Mitarai, Hiroko	4	0	0	0	0	0	0
Montero, Marcos	76	0	18	5	1	0	0
Morris, David	73	4	10	0	0	0	1
Mortensen, Kathy	42	1	2	0	0	0	0
Naylor, Pete	0	0	0	1	0	0	0
Orr, Quinn	16	0	0	0	0	0	0
Park, Russell	30	0	0	0	0	0	0
Rees, Jeff	39	0	15	0	0	4	0
Slaughter, Peter	88	5	11	2	1	31	1

- Note: These are examples of validation items that this client wanted to track by project manager. Your view would have different validation columns you would want to track.

Project ID	Product Name	Product ID	Item#/SKU	Language	Enter Prod.	Trans.	Proofing Cycles	Exit Prod.	Print	Dist.
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Albanian (101)	🟢	🔴	🔴	🔴	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Armenian (201)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Bislama (852)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Bulgarian (112)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Cambodian (258)	🟢	🟢	🟢	🟢	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Cebuano (853)	🟢	🟢	🟢	🔴	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Chuukese (901)	🟢	🔴	🔴	🔴	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Croatian (119)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Czech (121)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Danish (110)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Dutch (120)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	English (000)	🟢	🟢	🟢	🟢	🟢	🟢
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Estonian (124)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Fijian (858)	🟢	🟢	🟢	🟢	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Finnish (130)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	French (140)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	German (150)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Greek (133)	🟢	🔴	🔴	🔴	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Haitian (036)	🟢	🔴	🟢	🔴	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Hmong (295)	🟢	🟢	🟢	🟢	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Hungarian (135)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Icelandic (190)	🟢	🟢	🟢	🟢	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Indonesian (299)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Italian (160)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Kiribati (859)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Kosraean (868)	🟢	🔴	🔴	🔴	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Laotian (331)	🟢	🟢	🟢	🟢	🔴	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Latvian (153)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Lithuanian (156)	🟢	🟢	🟢	🟢	🟢	🔴
38837	Outline for Sharing Time and the Children's Sacrament Meeting 2009, Guide	PD00008742	02396	Marshallese (874)	🟢	🔴	🔴	🔴	🔴	🔴

- Note: You can look at each project and see the progress on the major milestones, allowing you to see much more detail on where the project is within the overall lifecycle.

**Project Dashboard**

**Project Information** [--Actions--]

Data	
Project Name	Implement Project & Resource Management Solution - Clarity
Project ID	PJ00000320
JDI Business	ITD PMO
As Of Date	May 8, 2009
Project Sponsor	MacAskill, Doug
Business Lead	Publicover, Rick
Project Manager	Dickson, Don
Stage	Build
Start Date	January 2, 2009
Production Date	June 6, 2009
Baseline Finish Date	November 9, 2009
Schedule Finish Date	November 9, 2009
Project Website	http://wss/sites/itd/projects/992966/default.aspx

Total Results: 13

**Cost Summary** [--Actions--]

Cost Type	Baseline	Planned	Actual	ETC	EAC
ITD Labour	0	0	0	0	0
Contractor Labor	0	0	0	0	0
Hardware Expense	0	0	0	0	0
Software Expense	152,505	149,049	147,505	0	147,505
Trav-Train Expense	33,000	29,571	22,071	7,500	29,571
Other Expense	550,280	544,373	310,945	233,428	544,373
<b>Totals</b>	<b>735,785</b>	<b>722,993</b>	<b>480,521</b>	<b>240,928</b>	<b>721,449</b>

**Open Milestones Filter** [--Actions--]

Status	Milestone Name	Baseline Date	Due Date
❌	Training	5/15/09	6/4/09
⬆️	User Documentation - Service Desk	6/4/09	6/4/09
⬆️	Stage 2 Documentation Complete	6/4/09	6/4/09
⬆️	Stage Gate 3	6/5/09	6/5/09
⬆️	Go Live - Service Desk and Time Entry	6/5/09	6/5/09
⬆️	RM Pilot Started	6/22/09	6/22/09
⬆️	User Documentation - Resource Management	7/17/09	7/17/09
⬆️	User Documentation - Time Entry and Billing	7/17/09	7/17/09

**Health Indicators** [--Actions--]

Status	Scope	Schedule	Gantt	Cost	Resource	Business	Overall
⬆️	⬆️	⬆️	📅	⬆️	⬆️	⬆️	⬆️

Total Results: 1

**Project Status** [--Actions--]

We have finished testing the upgrade. 2 of four issues remain open. Testing of Time Entry and Billing is ongoing.

Total Results: 1

**Next Steps** [--Actions--]

Continue testing the Work Management and Time Entry Processes.

Total Results: 1

**Project Issues** [--Actions--]

ID	Name	Target	Days Open	Assigned To
⬆️ IS000178	Project At a Glance	5/8/09	5	Dickson, Don
⬆️ IS000170	Billable Unbillable Details	5/11/09	6	Eisner, Brett
⬆️ IS000150	Upgrade - Reports not Printing	5/6/09	8	Dickson, Don
⬆️ IS000090	Connection Stability	4/21/09	22	Publicover, Rick
⬆️ IS000049	SR - HLE Process	5/1/09	28	Kunkulol, Atul

Total Results: 5

**Project Risks** [--Actions--]

ID	Name	Target	Days Open	Assigned To
⬆️ RS000036	Internet Speed / Availability	4/7/09	36	Dickson, Don
⬆️ RS000117	System Upgrade	5/1/09	12	Dickson, Don
⬆️ RS000037	System Availability	4/7/09	36	Dickson, Don

Total Results: 3

- Note: The dashboard can have multiple portlets showing financial information, milestones, issues, basic information, etc. Each of these portlets can then link to other portlets for more detail.

All Active Tasks							[--Actions--]	
Filter [--Select--]							[Collapse Filter]	
Project Name			Start					
Project Manager: Dickson, Don (ITD)			Finish		8/1/2009 to 9/30/2009			
Status: Not Started			Days Old					
			Power Filter		[Build Power Filter]			
Filter	Show All	Save Filter	Clear					
Project Name	Task	Start	Finish	Status	% Complete	Days Old		
Build a Std Model for Project Manager & Project Leader Development	High Level Design Document Development	7/31/09	8/14/09	Not Started	0%	-7		
Build a Std Model for Project Manager & Project Leader Development	Stage Gate 2	8/17/09	8/17/09	Not Started	0%	-10		
Build a Std Model for Project Manager & Project Leader Development	Schedule Development	8/17/09	8/21/09	Not Started	0%	-14		
Build a Std Model for Project Manager & Project Leader Development	Budget Development	8/17/09	8/21/09	Not Started	0%	-14		
Build a Std Model for Project Manager & Project Leader Development	Project Management Plan Completion	8/24/09	8/28/09	Not Started	0%	-21		
Build a Std Model for Project Manager & Project Leader Development	Functional Design Development	8/18/09	8/31/09	Not Started	0%	-24		
Build a Std Model for Project Manager & Project Leader Development	Technical Design Development	9/1/09	9/1/09	Not Started	0%	-25		
Build a Std Model for Project Manager & Project Leader Development	Design Phase	7/31/09	9/4/09	Not Started	0%	-28		
Build a Std Model for Project Manager & Project Leader Development	Project Management Plan Approval	8/31/09	9/4/09	Not Started	0%	-28		
Build a Std Model for Project Manager & Project Leader Development	Kick Off Meeting	9/8/09	9/8/09	Not Started	0%	-32		
Build a Std Model for Project Manager & Project Leader Development	Test Scenarios	9/9/09	9/15/09	Not Started	0%	-39		
Implement Project & Resource Management Solution - Clarity	Stage 2 Service Desk and Time Entry	6/19/09	8/2/09	Started	0%	5		
Implement Project & Resource Management Solution - Clarity	Support- Phase 2	6/7/09	8/2/09	Started	100%	5		
Implement Project & Resource Management Solution - Clarity	User Documentation - Resource Management	7/13/09	8/4/09	Started	0%	3		
Implement Project & Resource Management Solution - Clarity	Revisions - Phase 3	7/6/09	8/4/09	Started	0%	3		
Implement Project & Resource Management Solution - Clarity	Package OWB for deployment	7/13/09	8/4/09	Started	0%	3		
Implement Project & Resource Management Solution - Clarity	Stage 3 Resource Management	6/8/09	8/5/09	Started	0%	2		
Implement Project & Resource Management Solution - Clarity	Pilot - Phase 3	6/8/09	8/5/09	Started	0%	2		
Implement Project & Resource Management Solution - Clarity	Support - Phase 3	6/8/09	8/5/09	Started	0%	2		
Implement Project & Resource Management Solution - Clarity	Stage Gate 3	7/20/09	8/5/09	Not Started	0%	2		
Implement Project & Resource Management Solution - Clarity	Test Processes - Phase 3	6/15/09	8/5/09	Started	0%	2		
Implement Project & Resource Management Solution - Clarity	Pilot - Phase 4	8/11/09	8/11/09	Not Started	0%	-4		
Implement Project & Resource Management Solution - Clarity	Test Processes - Phase 4	8/11/09	8/24/09	Not Started	0%	-17		
Implement Project & Resource Management Solution - Clarity	Revisions - Phase 4	8/25/09	8/31/09	Not Started	0%	-24		
Implement Project & Resource Management Solution - Clarity	Stage 4 Documentation Complete	9/4/09	9/4/09	Not Started	0%	-28		
Implement Project & Resource Management Solution - Clarity	Go Live - Application/Asset/Change Management	9/4/09	9/4/09	Not Started	0%	-28		
Implement Project & Resource Management Solution - Clarity	Change Management	9/1/09	9/8/09	Not Started	0%	-32		
Implement Project & Resource Management Solution - Clarity	Training - Phase 4	9/1/09	9/8/09	Not Started	0%	-32		
Implement Project & Resource Management Solution - Clarity	Asset Management	9/1/09	9/8/09	Not Started	0%	-32		
Implement Project & Resource Management Solution - Clarity	Stage Gate 3	6/8/09	9/9/09	Started	0%	-33		
Implement Project & Resource Management Solution - Clarity	User Documentation - Application Management	9/8/09	9/14/09	Not Started	0%	-38		
Implement Project & Resource Management Solution - Clarity	Stage 4 Application/Asset/Change Management	6/8/09	9/22/09	Started	0%	-46		
Implement Project & Resource Management Solution - Clarity	Support - Phase 4	6/8/09	9/22/09	Started	0%	-46		
JDI DMAIC Template - For the Business	Charter Development	8/5/09	8/5/09	Not Started	0%	2		
JDI DMAIC Template - For the Business	Requirements Document Development	8/5/09	8/5/09	Not Started	0%	2		

- Note: Allow a PM to update the complete tasks each week across all of his/her project without opening each individually

Project Name	Task Name	Product Title	Product ID	Item#/SKU	Language	Start	Finish	Status	Pred Count	Days Late
A Brand New Year 2010	Coordinate Assets	Health Fair Puppet Show DVD	PD10000267	06783	Multilingual (090)	5/7/09	5/13/09	Not Started	1	86
A Brand New Year 2010	Edit Wireframes	A Brand New Year 2010 DVD	PD50018985		English (000)	7/28/09	7/29/09	Not Started	1	9
A Brand New Year 2010	AV packaging master to vendor	A Brand New Year 2010 DVD	PD50018985		English (000)	3/30/09	3/30/09	Not Started	0	130
A Brand New Year 2010	Final Delivery	A Brand New Year 2010 DVD	PD50018985		English (000)	5/12/09	5/12/09	Not Started	0	87
A Brand New Year 2010	Deliver Final Product Samples to Internal Areas	A Brand New Year 2010 DVD	PD50018985		English (000)	5/5/09	5/12/09	Not Started	1	87
A Brand New Year 2010	Design direction (Menu/Packaging)	A Brand New Year 2010 DVD	PD50018985		English (000)	7/31/09	8/3/09	Not Started	1	4
A Brand New Year 2010	Prepare Fixed Bid documentation	A Brand New Year 2010 DVD	PD50018985		English (000)	6/26/09	7/2/09	Not Started	0	36
A Brand New Year 2010	Create Wireframes	A Brand New Year 2010 DVD	PD50018985		English (000)	8/6/09	8/6/09	Not Started	0	1
A Brand New Year 2010	AV master to vendor	A Brand New Year 2010 DVD	PD50018985		English (000)	3/30/09	4/6/09	Not Started	0	123
A Brand New Year 2010	Define Requirements (Sponsor)	A Brand New Year 2010 DVD	PD50018985		English (000)	6/22/09	6/25/09	Completed	0	43
A Brand New Year 2010	AV packaging master to vendor	A Brand New Year 2010 DVD	PD50018985		English (000)	3/30/09	3/30/09	Not Started	0	130
A Brand New Year 2010	Local Archiving of DVD Product	A Brand New Year 2010 DVD	PD50018985		English (000)	3/30/09	3/30/09	Not Started	0	130
A Brand New Year 2010	Create Wireframes	A Brand New Year 2010 DVD	PD50018985		English (000)	7/17/09	7/23/09	Not Started	2	15
A Brand New Year 2010	Asset Archiving	A Brand New Year 2010 DVD	PD50018985		English (000)	6/4/09	6/24/09	Not Started	2	44
A Brand New Year 2010	Distribution Item Setup/SL Order	A Brand New Year 2010 DVD	PD50018985		English (000)	3/31/09	3/31/09	Not Started	1	129
A Brand New Year 2010	Order Samples	A Brand New Year 2010 DVD	PD50018985		English (000)	4/1/09	4/1/09	Not Started	1	128
A Brand New Year 2010	Duplication/Replication	A Brand New Year 2010 DVD	PD50018985		English (000)				2	95
A Brand New Year 2010	Distribution Item Setup/SL Order	A Brand New Year 2010 DVD	PD50018985		English (000)				1	129
A Brand New Year 2010	Order Samples	A Brand New Year 2010 DVD	PD50018985		English (000)				1	128
A Brand New Year 2010	Fixed Bid process	A Brand New Year 2010 DVD	PD50018985		English (000)				1	31

Schedule Finish	Days Late (Schedule)	Baseline Finish	Days Late (Baseline)
12/28/07	287		
10/6/08	4	8/15/08	56
9/11/08	29	9/11/08	29
4/10/08	183		
7/14/08	88		
8/12/08	59		
9/29/08	11	9/29/08	11
10/9/08	1		
7/11/08	91	7/11/08	91
9/30/08	10	8/11/08	60
3/14/08	210		
3/31/08	193		
5/5/08	158		
6/25/08	107	6/25/08	107
7/7/08	95	7/7/08	95
9/10/08	30	9/10/08	30
9/17/08	23	9/17/08	23
9/30/08	10		
9/30/08	10	9/30/08	10
10/3/08	8	10/3/08	8

Total Results: 259497      Total Pages: 12975

- Note: This is a view of all tasks that are “old” within the system by project, manager, or product. Next, you can layer in a R/Y/G status based on how “old” it is. If made by a query, you can also show if that task has open predecessors.

All Active Assignments [--Actions--]

Filter [--Select--] [Collapse Filter]

Project Name

Task Name

Resource Dupere, Yvon (ITD)  
Smith, Angela (ITD)  
Thibeau, Ritchie (ITD)

Project Manager

Status Completed  
Not Started  
Started

Power Filter [Build Power Filter]

Filter Show All Save Filter Clear

Project Name▲	Task Name	Resource	Status	Start	Finish	ETC
Advanced Supply Chain Planning system selection	Negotiate with preferred supplier	Smith, Angela (ITD)	Not Started	6/30/09	6/30/09	0
Advanced Supply Chain Planning system selection	Negotiate with preferred supplier	Dupere, Yvon (ITD)	Not Started	6/30/09	6/30/09	0
Advanced Supply Chain Planning system selection	Project Evaluation	Smith, Angela (ITD)	Not Started	7/6/09	7/6/09	8
AIM - PM & Infrastructure - ITD	Approve Architecture - Business	Thibeau, Ritchie (ITD)	Started	7/20/09	8/20/09	1
AIM - PM & Infrastructure - ITD	Attend BNI ERP Upgrade kick-off meeting	Smith, Angela (ITD)	Not Started	8/10/09	8/10/09	1
AIM - PM & Infrastructure - ITD	Attend BNI ERP Upgrade kick-off meeting	Thibeau, Ritchie (ITD)	Not Started	8/9/09	8/10/09	0
AIM - PM & Infrastructure - ITD	Book kick-off meeting	Smith, Angela (ITD)	Started	6/30/09	8/10/09	2
AIM - PM & Infrastructure - ITD	Communicate project activities to key stakeholders	Thibeau, Ritchie (ITD)	Not Started	6/8/09	6/8/09	0
AIM - PM & Infrastructure - ITD	Develop PM Plan	Thibeau, Ritchie (ITD)	Not Started	8/9/09	8/24/09	0
AIM - PM & Infrastructure - ITD	Develop Project Charter	Smith, Angela (ITD)	Started	6/18/09	8/10/09	3
AIM - PM & Infrastructure - ITD	Develop project name and logo/ slogan	Smith, Angela (ITD)	Not Started	8/10/09	8/10/09	2
AIM - PM & Infrastructure - ITD	Get RTO and RPO from business	Smith, Angela (ITD)	Not Started	8/10/09	8/10/09	12
AIM - PM & Infrastructure - ITD	ITD Labour Estimate	Smith, Angela (ITD)	Not Started	8/10/09	9/23/10	11,147
AIM - PM & Infrastructure - ITD	Plan kick-off agenda	Smith, Angela (ITD)	Started	6/30/09	8/10/09	0
AIM - PM & Infrastructure - ITD	Prepare presentation materials	Smith, Angela (ITD)	Not Started	8/10/09	8/10/09	8
AIM - PM & Infrastructure - ITD	Record vacations and other time constraints	Smith, Angela (ITD)	Not Started	8/10/09	8/10/09	2
AIM - PM & Infrastructure - ITD	Review and design Advertising workflow	Smith, Angela (ITD)	Started	7/21/09	8/10/09	21
AIM - PM & Infrastructure - ITD	Review and design content publisher (editorial)	Smith, Angela (ITD)	Started	7/20/09	8/10/09	52
AIM - PM & Infrastructure - ITD	Review materials with key presenters	Thibeau, Ritchie (ITD)	Not Started	8/10/09	8/10/09	2
AIM - PM & Infrastructure - ITD	Review proposed project schedule from DTI	Smith, Angela (ITD)	Started	6/17/09	8/10/09	2

- Note: Show all active assignments across all projects to allow a PM or an functional manager to see the open assignments for certain people.

**Question 3**

Question 3 1.1 Does your country support the strategy of the Global Data Privacy Program as it is written in Chapter 2 of the Global Data Privacy Document v2.1 or v2.2 or in 1.1 of the Global Data Privacy Policy and Requirements v2.2 document?

Q3 Priority High

Question 3 Answer Yes

Question 3 Comment

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**Question 4**

Q4 Priority High

Question 4 1.2.1 Does your country have a designated Data Privacy Owner (DPO) to manage the data privacy program and a designated team of individuals named by your country manager to assist the DPO?

Question 4 Answer Yes

Question 4 Comment

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**Question 5**

Q5 Priority High

Question 5 1.2.1a Are the roles and responsibilities of these team members documented and do the team members know what they are accountable for?

Question 5 Answer No

Question 5 Comment We do not have the roles and responsibilities of the teammates documented

**Survey Health**

0.0 Information Data Flow	◆ (Green)
1.0 Management & Organization	◆ (Green)
2.0 Regulatory Authority	◆ (Yellow)
3.0 Notices & Awareness	◆ (Green)

<input type="checkbox"/>	Name ^	0.0	1.0	2.0	3.0	4.0
<input type="checkbox"/>	testing	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP AM SA Brazil	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP Columbia	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP Denmark	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP EM CE Germany	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP Italy	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP Korea	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP Mexico	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP Signapore	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP Slovakia	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP Spain	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP Thailand	◆	◆	◆	◆	◆
<input type="checkbox"/>	2007 MP US	◆	◆	◆	◆	◆

- Note: Develop you set of questions and responses with scores. See the H/M/L by question as well as the overall complexity score. Then see the complexity across all projects.

**Properties**

- ▶ General
- ▶ Lifecycle Details
- ▶ **Status Reports**
- ▶ Admin
- Estimating
- Contract
- Access to this Project

**Project Status Report**

Filter: System Default

New Delete Exit

Current Status	Name	Report Date	Created By	Overall	Scope	Sched	Budget
<input type="checkbox"/>	Test	8/6/09	Dickson, Don (ITD)	◆	◆	◆	◆
<input type="checkbox"/>	Weekly Status Report	7/24/09	Dickson, Don (ITD)	◆	◆	◆	◆
<input type="checkbox"/>	Weekly Status Report	7/14/09	Dickson, Don (ITD)	◆	◆	◆	◆
<input type="checkbox"/>	Weekly Status Report	6/7/09	Dickson, Don (ITD)	◆	◆	◆	◆
<input type="checkbox"/>	Status	5/29/09	Dickson, Don (ITD)	◆	◆	◆	◆
<input type="checkbox"/>	Status Report	5/22/09	Dickson, Don (ITD)	◆	◆	◆	◆
<input type="checkbox"/>	Report	5/14/09	Dickson, Don (ITD)	◆	◆	◆	◆
<input type="checkbox"/>	Status Report	5/1/09	Dickson, Don (ITD)	◆	◆	◆	◆
<input type="checkbox"/>	Update	4/24/09	Dickson, Don (ITD)	◆	◆	◆	◆
<input type="checkbox"/>	Status 4/11/09	4/11/09	Dickson, Don (ITD)	◆	◆	◆	◆
<input type="checkbox"/>	Status Report	4/7/09	Eisner, Brett (ITD)	◆	◆	◆	◆

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**Project Information**

Project Name: Implement Project & Resource Management Solution - Clarity  
Project ID: PJ00000320

Project Manager: Dickson, Don (ITD)  
Project Stage: IT/Build

**General**

ID: 001739  
Overall Health: Green

Name: Weekly Status Report  
Report Date: 7/24/2009

Submit and Publish:

**Comment**

Project Status: The team is focusing on three areas. Preparation for the next billing cycle by addressing issues and concerns from the last round. Supporting the Resource Planning Pilot rollout. Rolling out additional processes and functionality within the processes that we have already rolled out.

Next Steps: Continue to the above. Initiate focus on the next phase of Asset/Application and Change Management.

Management Attention:

**Health Areas**

Scope/Quality Health: Yellow  
Scope/Quality Comment: Difficult to keep to the original scope. To this point we have not initiated impact documents but will start doing so.

Schedule Health: Yellow  
Schedule Comment: An Impact document is required to document the change in project milestones for the requested change to Resource Management rollout.

Budget Health: Green  
Budget Comment:

Resource Health: Green  
Resource Comment: Concern that support for NBSR, APS, TMS and E1 may take away from the deliverables in this project.

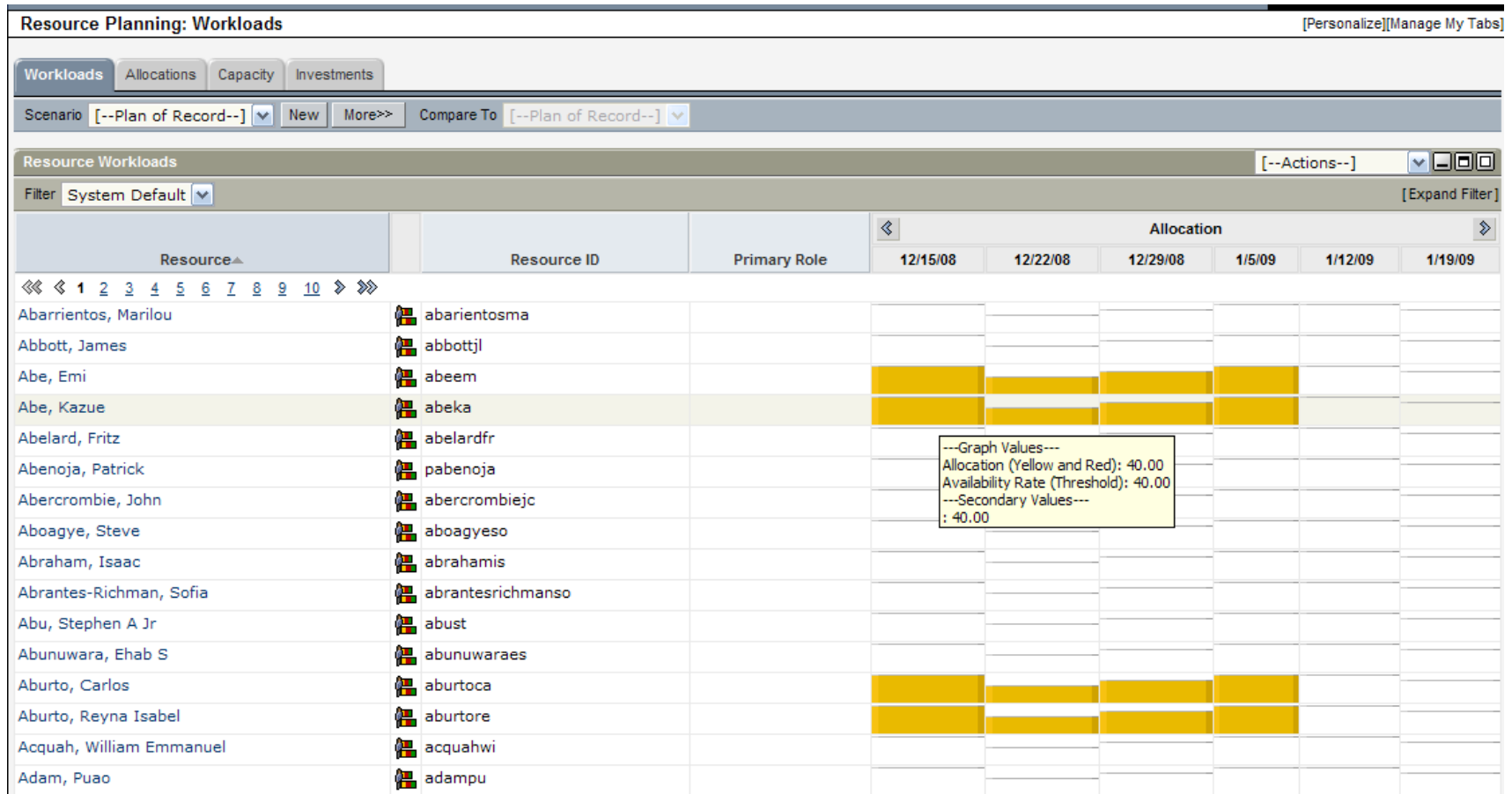
Business Sat. Health: Green  
Business Sat. Comment:

Save Submit Cancel

Required

- Note: Enter detailed status information each week, then track the status reports submitted over time to see the trends.

- Resource Planning -



- Scenario Planning - Create scenarios to change overall allocations, then compare scenarios to plan of record and replace plan of record

Resource Planning: Allocations [Personalize][Manage My Tabs]

Workloads **Allocations** Capacity Investments

Scenario: Current Scenario   Compare To: [--Plan of Record--]

Weekly: Current Scenario   Test Scenario 1   [--Actions--]

Filter: System Default   [Expand Filter]

Resource	Investment Role	Investment	Allocation	Allocation (Compare To)	Allocation					
					12/15/08	12/22/08	12/29/08	1/5/09	1/12/09	1/19/09
Abe, Emi		Next Gen. LDS.org R1	2,544.00	2,544.00	█	█	█	█		
Abe, Kazue		Next Gen. LDS.org R1	2,544.00	2,544.00	█	█	█	█		
Aburto, Carlos		Next Gen. LDS.org R1	1,336.00	1,336.00	█	█	█	█		
Aburto, Reyna Isabel		Next Gen. LDS.org R1	2,544.00	2,544.00	█	█	█	█		
Adamson, Dal		BYU Executive MBA Program	2,032.00	2,032.00	█	█	█	█	█	█
Adamson, Dal		BYU-Legacy Hall, Phase 2	952.00	952.00						
Adamson, Dal		The Messiah	3,336.00	3,336.00	█	█	█	█	█	█
Adamson, Kevin		Global Funding Service (GFS) Rewrite	1,864.00	1,864.00	█	█	█	█	█	█
Admin, TRL		Letter 8 Dec 08: Financing Missionary Service - Canada	72.00	72.00	█	█				
Admin, TRL		P&M - 2008 Supp Prod: CUR Mag. & Scrip. recording "The Tender Mercies"	368.00	368.00	█	█	█	█	█	█
Admin, TRL		Elder Joseph B. Wirthlin Funeral	64.00	64.00						
Admin, TRL		Letter 8 Dec 08: Financing Missionary Service - Denmark	56.00	56.00	█	█				
Admin, TRL		Letter 8 Dec 08: Financing Missionary Service - Netherlands	72.00	72.00	█	█				
Admin, TRL		2008 Supp Prod: LDP - Ecuador Food Production 2008	720.00	720.00	█	█	█	█	█	█
Admin, TRL		Stock Music Library	408.00	408.00	█	█	█	█	█	█
Admin, TRL		Letter 8 Dec 08: Financing Missionary Service - Ireland	56.00	56.00	█	█				
Admin, TRL		Letter 26 Nov 08: Construction of a Temple in Trujillo, Peru	120.00	120.00	█	█				
Admin, TRL		Trials Revision: Letter day Saint Women Part B, The	1,206.00	1,206.00	█	█	█	█	█	█

- Capacity – Look at the total resources needed (based on current allocations) vs. resources of the same role

Resource Planning: Capacity [Personalize][Manage My Tabs]

Workloads Allocations **Capacity** Investments

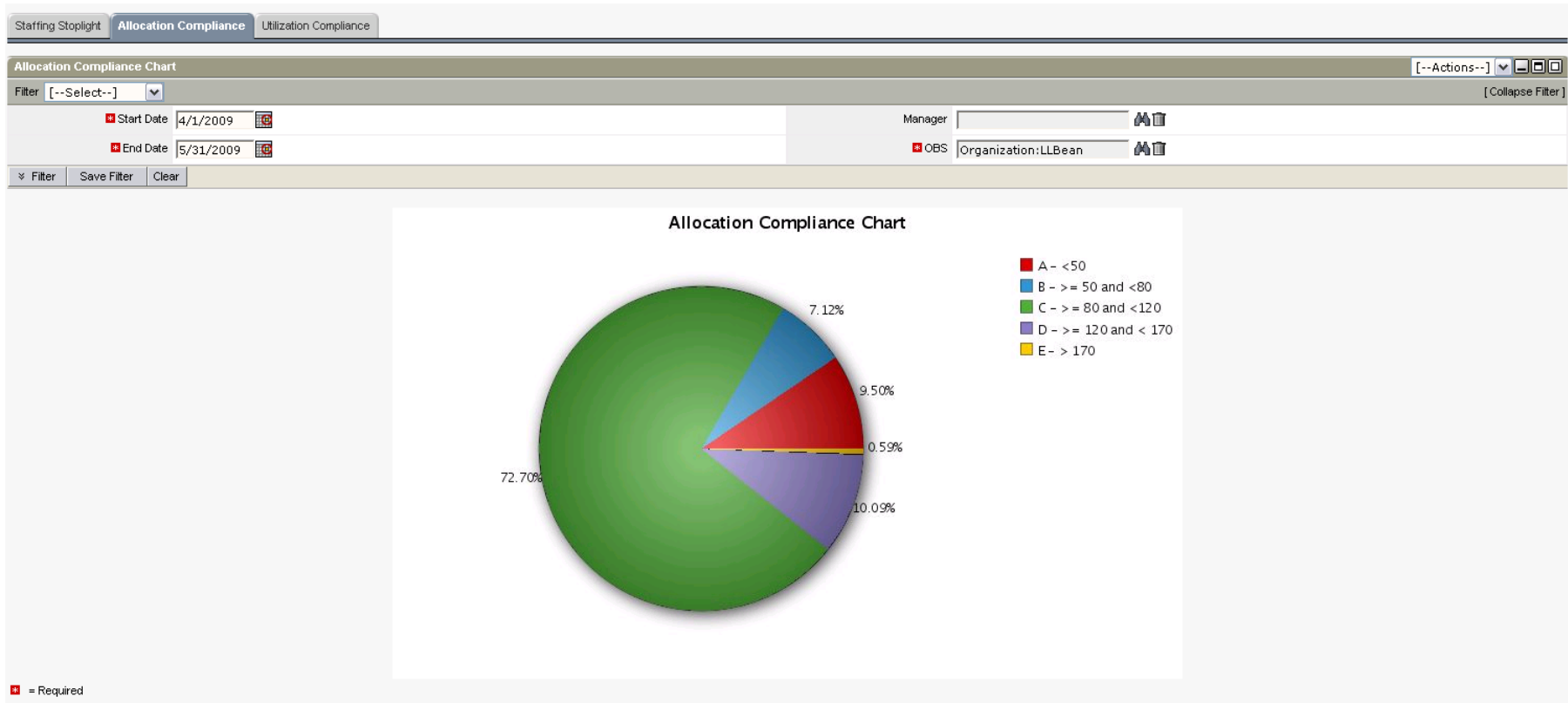
Scenario Current Scenario   Compare To [--Plan of Record--]

Role Capacity Time-scaled Value

Filter [--Select--] [Expand Filter]

Role		Demand/Capacity						
		Q4 2008	Q1 2009			Q2 2009		
		Dec 08	Jan 09	Feb 09	Mar 09	Apr 09	May 09	
OM-Sr. Instr Designer	Demand Capacity	1.00 1.00	1.00 1.00	0.84 1.00	1.00	1.00	1.00	1.00
OM-Production Coordinator	Demand Capacity	0.62 2.00	2.00	2.00	2.00	2.00	2.00	2.00
OM-Production Assistant	Demand Capacity	2.00	2.00	2.00	2.00	2.00	2.00	2.00
OM-Production Artist	Demand Capacity							
OM-Mobile Prod Coordinator	Demand Capacity	6.57 1.00	4.85 1.00	4.00 1.00	4.00 1.00	3.41 1.00	2.45 1.00	
OM-Manager	Demand Capacity	1.00 1.00	1.00 1.00	1.00 1.00	1.00 1.00	1.00 1.00	1.00 1.00	1.00 1.00
OM-IP Assistant	Demand Capacity							
OM-Instructional Designer	Demand Capacity	5.24 5.00	4.45 5.00	3.58 5.00	3.00 5.00	3.00 5.00	3.00 5.00	3.00 5.00
OM-Information Architect	Demand Capacity	19.29 2.00	19.05 2.00	15.42 2.00	14.36 2.00	9.64 2.00	7.75 2.00	2.00
OM-Elearning Scriptwriter	Demand Capacity							
<b>Total Demand</b>		<b>33.71</b>	<b>30.35</b>	<b>24.84</b>	<b>22.36</b>	<b>17.05</b>	<b>14.20</b>	
<b>Total Capacity</b>		<b>14.00</b>	<b>14.00</b>	<b>14.00</b>	<b>14.00</b>	<b>14.00</b>	<b>14.00</b>	<b>14.00</b>
<b>Variance</b>		<b>-19.71</b>	<b>-16.35</b>	<b>-10.84</b>	<b>-8.36</b>	<b>-3.05</b>	<b>-0.20</b>	

Total Results: 10  
Work Effort=FTE



- Note: This allows you to see for a certain organization or all organizations the allocation compliance over a period of time. This tells you if RMs are keeping their allocations current – most people should be between 80 and 120% allocated.

- Business Analysis – Gathering the detailed requirements prior to the configuration of Clarity
- Configuration – Creating/updating objects and object views, development of portlets, reports, and processes
- Revisions– Improvement of views, portlets, reports after demonstration with key stakeholders and/or pilot groups.
- Documentation – Development of training and support documentation
- Training/Deployment – Training end users both in group and individual settings
- Migrate – Loading data from existing sources manually or through an automated XOG

Target Area	Bus. Analysis	Config.	Revisions	Doc.	Training	Migrate	Details
User Training	10 hours	0	0	5 hours / training file made	0	0	<ul style="list-style-type: none"> <li>• Create electronic how-to file that can be downloaded and reviewed by individuals</li> <li>• Create a quick reference guide per training file created</li> </ul>
Project Approval Workflow	4 hours	4 hours	2 hours	2 hours	2 – 10 hours	1 hour	<ul style="list-style-type: none"> <li>• 1 Workflow process</li> <li>• Portlet for tracking open process action items</li> </ul>
Tips and Tricks for Users	2 hours	4 hours	0	1 hour	0	1 hour	<ul style="list-style-type: none"> <li>• 1 Object</li> <li>• 1 Portlet for users to see active tips and tricks</li> <li>• 1 Process to notify users of new tip</li> </ul>
PMO Portlet views	5 hours	15 hours	5 hours	1 hour	2 hours	2 hours	<ul style="list-style-type: none"> <li>• 4 portlets</li> <li>• 1 new portlet page / menu link to house the portlets</li> </ul>
PM Portlet Views	3 hours	10 hours	2 hours	1 hour	2 – 10 hours	2 hours	<ul style="list-style-type: none"> <li>• 4 portlets</li> <li>• 1 new portlet page / menu link to house the portlets</li> </ul>
GIT Administration Training	0	0	0	0	5 – 40 hours	0	<ul style="list-style-type: none"> <li>• This can vary widely based on the type of training and the strength of the people being trained</li> </ul>
Complexity Matrix in Clarity	1 hour	3 hours	1 hour	1 hour	1 – 5 hours	1 hour	<ul style="list-style-type: none"> <li>• New fields on project object</li> <li>• H/M/L on project calculation</li> </ul>
Project Status Reports	5 hours	8 hours	2 hours	2 hours	2 – 10 hours	2 hours	<ul style="list-style-type: none"> <li>• 1 new object for status</li> <li>• 1 process for status submission</li> <li>• 1 new portlet within project dashboard</li> </ul>
Resource Management	10 hours	2 hours	0	4 hours	20 – 40 hours	1 hour	<ul style="list-style-type: none"> <li>• 1 portlet for allocation compliance</li> <li>• The requirements take some time in order to ensure all understand the Clarity res. mgmt. process</li> </ul>

Note: We could “fixed bid” for the configuration portion of the estimate, but the other areas depend on your involvement and requirements process. Many of the areas you could do alone including: business analysis, content, training, and even migration. The business analysis and the revisions columns will depend on the strength of the requirements process – better requirements mean less changes once the configuration is complete.

Note: Excludes costs for travel if necessary