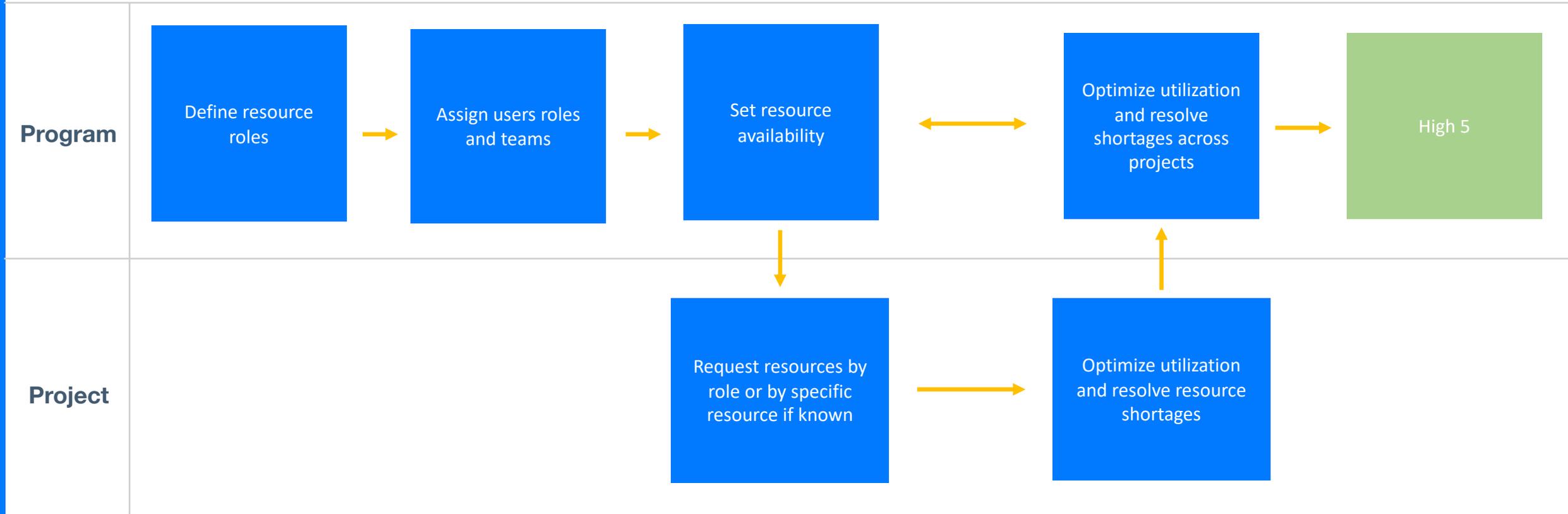




# **PROGRAM RESOURCE MANAGEMENT**



# PROGRAM RESOURCE MANAGEMENT PROCESS





# PROGRAM

Resource role, teams and availability



# RESOURCE ROLES

- Resource role is derived from the Amplify permissions and role-based access system
- Roles are defined by Program and can be shared between programs

The screenshot shows the Amplify web application interface. The top navigation bar includes the Amplify logo, a home icon, 'Home' with a dropdown arrow, 'Enterprise' with a dropdown arrow, a search bar, and a user profile icon labeled 'AS'. Below the navigation bar, the breadcrumb trail shows 'Home' and 'Program One'. The main content area is titled 'Roles & Permissions' and includes a 'New Role' button. A table lists various roles with their member counts and update times. On the left, a sidebar menu shows 'Teams & Roles' with sub-items 'Teams', 'Roles & Permissions' (highlighted), and 'Audit'.

Name	Member Count	Updated	
Project Manager	0	13 Aug 16:46	
Project Sponsor	0	13 Aug 16:46	
Dependency Manager	1	13 Aug 16:46	
Organisational Change Manager	0	13 Aug 16:46	
Transformation Officer	0	14 Aug 01:37	
Benefits Sponsor	0	14 Aug 01:37	
Change Owner	0	14 Aug 01:37	



# RESOURCE TEAMS

- Users are organized into teams on the Program
- Users can hold multiple roles/skills
- Users can belong to multiple teams and hold a variety of skills in each
- Teams can be shared between Programs

## Teams & Roles

Teams

Roles & Permissions

Audit

## Teams

New Team

Project

Delivery Squad

Role

Sort By: Name

SM

Phil Edwards  
phil@amplify-now.com

Project Officer

SM

Tommy Kalsbeek  
tommy@amplify-now.com

Project Officer, Integration

SM

Tobyn Dockeril  
tobyn@amplify-now.com

Project Officer

Add Team Member

Select

Deliver

Enter

Me

Autom

Infrastr

Region

USA

Saving

Region

All



# RESOURCE AVAILABILITY

- Available from the Resources tab on a Program
- Availability is defined as a percentage of a full-time employee
- If a resource is required on multiple programs, this must be reflected in the resource availability on each program. Eg – A resource is split 70/30 between two programs - Program A would enter 70% and Program B would enter 30%
- Availability can also be managed via integration with an external system

The screenshot shows the AMPLIFY software interface. The top navigation bar includes the AMPLIFY logo, a home button, and the user 'Acme Inc.'. The breadcrumb trail is 'Acme Inc. > Business Transformation Program > Cost Reduction Initiatives > Domestic'. The main header displays the program name 'Scale ICT end user support for new organisation size' and the 'Resources' tab is selected. Below the header, there are filters for 'Delivery Resources', 'Save as', and a date range selector set to 'July 2019' to 'August 2021'. The main table displays resource availability data for September, October, and November 2020. The table has columns for Resource Name, Role, Availability, and Remaining for each month. The 'Remaining' column uses color coding: green for positive values and red for negative values.

Resource Name	Role	September, 2020		October, 2020		November, 2020	
		Availability	Remaining	Availability	Remaining	Availability	Remaining
Philip Edwards	Project Manager	100%	100%	100%	100%	100%	100%
Tobyn Dockeril	Project Manager	50%	50%	100%	100%	100%	100%
Luke Picciau	Project Manager	100%	20%	100%	100%	100%	100%
Ben Weightman	Project Manager	80%	100%	100%	100%	100%	100%
Anthony Truong	Project Support Officer	75%	-50%	100%	100%	100%	100%
Harish Girishankar	Project Support Officer	50%	100%	100%	100%	100%	100%
Nisha Koshy	Project Support Officer	100%	50%	100%	100%	100%	100%
Jack Harkness	Project Support Officer	100%	100%	100%	100%	100%	100%
Lucy Romano	Finance	50%	100%	100%	100%	100%	100%
Jessica Temple	Finance	25%	0%	100%	100%	100%	100%
Zoe Hamilton	Marketing	100%	0%	100%	100%	100%	100%
Elio Rillo	Marketing	50%	100%	100%	100%	100%	100%
Matt Williams	Governance	50%	50%	100%	100%	100%	100%
Lian Wang	Governance	50%	25%	100%	100%	100%	100%
Wei Yang	Governance	50%	100%	100%	100%	100%	100%
Kristy Clifford	Data	100%	100%	100%	100%	100%	100%



# PROJECT

Assigning teams, creating resource requests and viewing utilization



# ADDING TEAMS TO A PROJECT

- Teams can be automatically added to a project via their reporting groups
- Or manually added by a project manager with the team management permission
- The teams define the resource pool for a Project

The screenshot displays the 'Teams & Roles' interface. On the left, a sidebar contains 'Teams & Roles' with sub-items 'Teams', 'Roles & Permissions', and 'Audit'. The main area is titled 'Teams' and features a 'New Team' button. Below this are filters for 'Project', 'Role', and 'Sort By: Name'. A dropdown menu is open, listing reporting groups: 'Analytics/Data/InfoSys', 'Audit', 'Delivery Squad', 'Finance', 'Human Resources', 'Sales & Marketing', and 'Telemetry'. The 'Delivery Squad' option is highlighted. Below the dropdown, three team cards are visible, each with a profile picture, name, email, and role. The first card is for Phil Edwards (Project Officer), the second for Y Kalsbeek (Project Officer, Integration), and the third for Tobyn Dockeril (Project Officer). On the right side, a sidebar shows 'Selected Team: Delivery Squad', 'Enter a description', 'Members: 3', 'Automatic Assignments', and 'Infrastructure' details including Region (USA) and Division (Environment).



# RESOURCE REQUESTS

- Resource requests are created on Project schedules
- A specific resource can be requested by Name if the Project teams have been established
- Or a request can be made of a Role if the specific resources have not yet been assigned to the project
- Utilization is assigned as a percentage of a full-time employee

The screenshot displays a project schedule interface with a task list and a resource assignment dialog. The task list includes:

- Launch SaaS Product
- Setup web server
  - Install Apache (Celia 100%)
  - Configure firewall (Celia 100%, Gloria 100%)
  - Setup load balancer (Dan 100%, Dave 100%, G...)
  - Configure ports
  - Run tests
- Website Design
  - Contact designers (Gloria 100%, Rob 100%)
  - Create shortlist of three des (George 100%)
  - Select & review final design

The 'Information' dialog box is open, showing the 'Resources' tab. It contains a table with the following data:

Resource	Units
Celia	100%
Gloria	100%

Buttons for '+', '-', 'Save', 'Delete', and 'Cancel' are visible in the dialog.





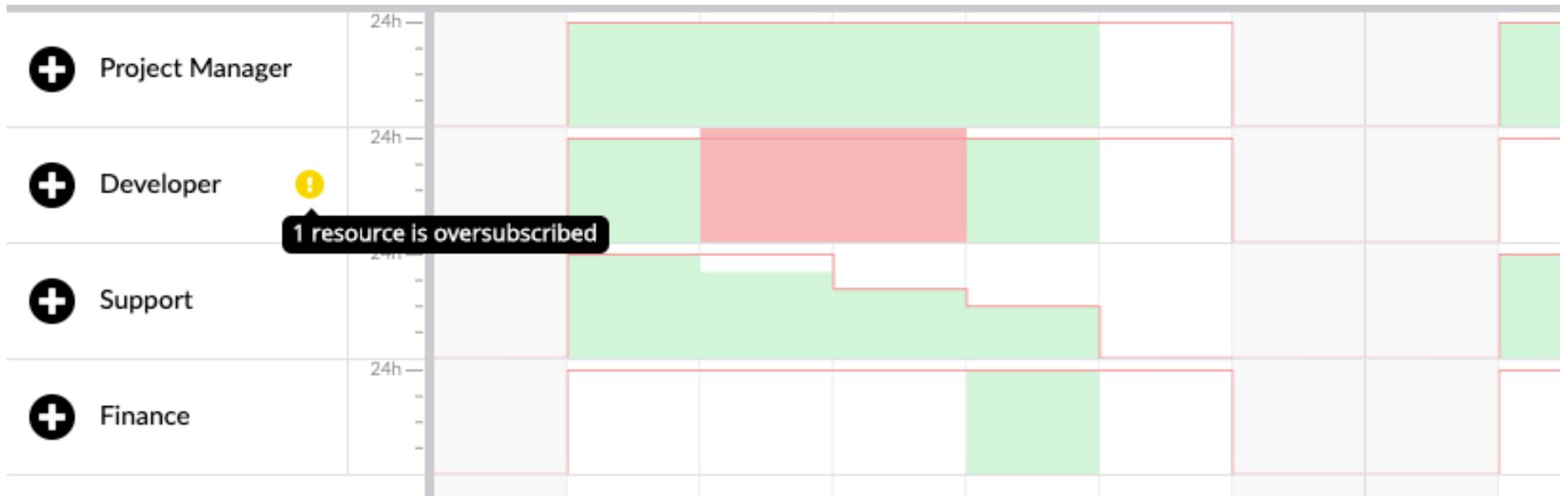
# PROGRAM RESOURCE MANAGEMENT

Viewing resource requests, identifying availability issues



# RESOURCE AVAILABILITY VS REQUESTS

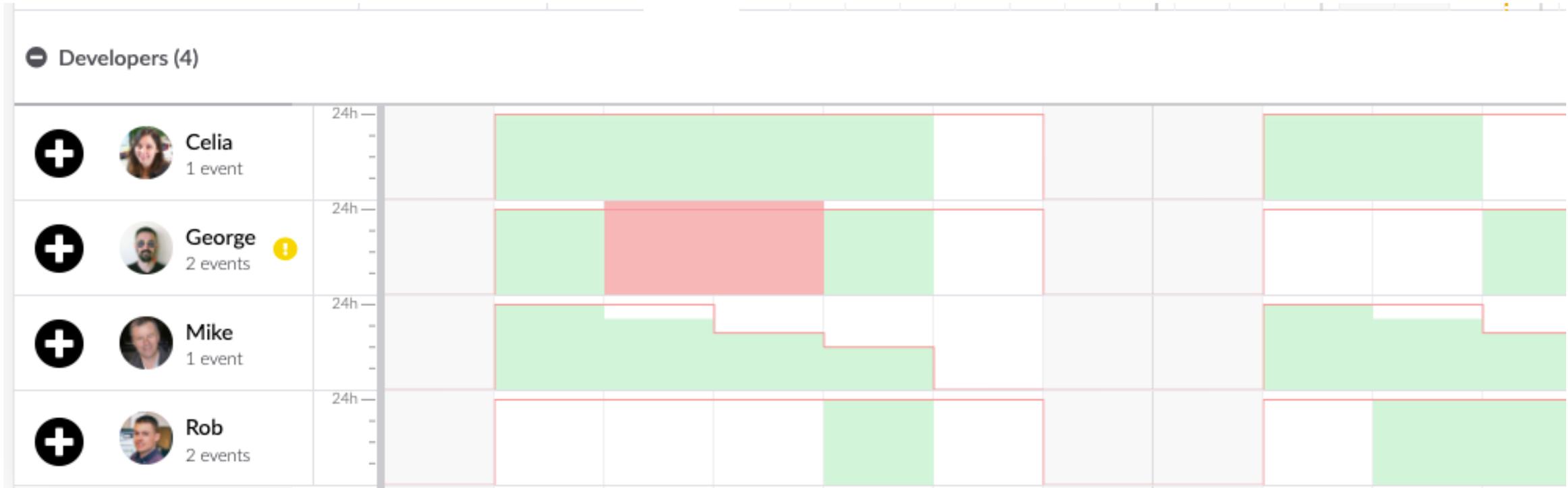
- The default view is a histogram by role where the role has at least one resource request
- Here we can see that for the developer role, the resource requests have exceeded availability
- The insights system is highlighting the roles that require attention





# RESOURCE AVAILABILITY VS REQUESTS

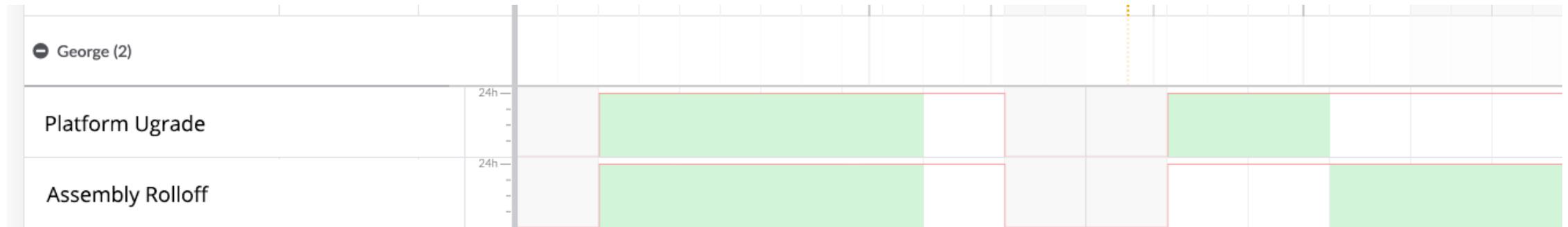
- Expanding the developer group we can see the individual developer resources
- In this example we can see that George is over subscribed with two events





# RESOURCE AVAILABILITY VS REQUESTS

- Expanding Georges allocation we can now see the projects he is assigned to
- We can see that two projects have requested 100% of Georges time
- The resource manager can now resolve the issue between projects





# INSIGHTS

## Program Insights

- **Resource Capacity Warning** - surfacing the number of roles, and the number of specific resources within that role that are over subscribed.
- **Role Balancing Required** – for a role with multiple resources, 1 resource can be overcommitted, and another can be under committed in such a way that balances the over all availability. Insights will highlight these issues.
- **Projects with resource issues** – surface projects that require attention

## Project Insights

- Resource oversubscribed



# WORK WEEK ENABLED SCHEDULES

- A work week will be configured in Amplify admin and will apply system wide
- Admin is required to select the first and last days of the work week
- All schedules will be updated to reflect the work week. Tasks will automatically be extended if they span the weekend
- Schedule and resource views will now show weekends

- Overview
- Manage Users
- Site Settings
- Mapping Techniques
- Classifications
- Measurement Units
- Custom Fields
- Notifications
- SSRS Reports
- Power BI Reports
- Teams & Roles
- Status Thresholds
- Ratings
- Amplify License
- Workflows
- Stage Gate Process Editor
- Cost Groups & Categories

## Site Settings

Enterprise Name <sup>\*requires restart</sup>

The name of the root initiative, from which all others stem

Locale <sup>\*requires restart</sup>

Set the Default Language. Users have the option of setting their own preferred language.

Sub Locale <sup>\*requires restart</sup>

Sub Locale - used to override the region's currency and date formats

### Work Week Configuration

**!** Saturday and Sunday will be treated as non work days when scheduling and managing resources

### Allowed Document Formats

A space-separated list of document formats allowed to be uploaded to Amplify (lowercase)



# ASSUMPTIONS

- Resource availability will be managed Monthly
- Resource availability will be entered a percentage of the organizations standard work hours for the period, this is conventionalized and not configured in Amplify
- Amplify will not support non labor resources