

ETC in Clarity and OWB

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Introduction

The purpose of this document is to illustrate how Clarity apply ETC differently when resources are assigned to tasks

Glossary

Availability = The length of working day as defined by the length of the shifts of the working day in the calendar. Availability is time varying and under certain prerequisites displayed as availability ratio in resource properties.

Allocation = The association of a resource to the project team. The time varying value of allocation is by default from project start to project finish by default at 100 % of the availability. A user with booking rights to the resource and project can override the defaults and the default allocation percent can be set different from 100 %

Assignment = The association of a resource a project task. The assignment is by default from task start to task finish and can be overridden by the user under certain prerequisites. Assignment as such has no value.

ETC = Estimate to complete is the work effort to complete a resource assignment and assignment level ETC's are summarize to task ETC's. Conceptually ETC is not dependent on anything else or derived from anything, but in Clarity and OWB there are certain automation and certain restrictions which the examples will illustrate.

The Example project

For the examples a test project is created with project start November 26 and project end November 27. Two resources are added to the project team and eventually there is a single task to which both resources are assigned.

Project: ETC_Alloc - Team - Staff Scenario: [--Select--] Actions

Filter: System Default

	Resource	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation	Actuals	ETC	Actuals
<input type="checkbox"/>	Martin, Paul	CSK Project Manager	✓	Soft	New	26.11.2012	30.11.2012	100,0%	40,00	0,00	40,00	
<input type="checkbox"/>	Ueberoth, Ed		✓	Soft	New	26.11.2012	30.11.2012	100,0%	40,00	0,00	40,00	

Fig. Project team of the example project.

Examples

Both resources are allocated at default rate to the full length of the project. The default 100 % allocation equal to the availability (5 * 8 = 40 hrs). There is also ETC of 40 hrs for both resource. That is because, the project management options are set to allow creation of Effort task.

Project: ETC_Alloc - Tasks - Task List Open in Scheduler Scenario: [--Select--] Actions

Filter: None

Task	ID	Start	Finish	% Complete	ETC
ETC_Alloc	~rmw	26.11.2012	30.11.2012	0,00%	80,00

Displaying 1 - 1 of 1

Fig. The effort task.

when the project team is created the effort task is automatically created and all resources added to the project team are automatically assigned to the effort task and ETC's are set at the default allocation. At task level the ETC is 40 + 40 = 80 hrs. The name of the effort task is the same as the name of the project and the id is always ~rmw.

Project: ETC_Alloc - Team - Detail Scenario: [--Select--] Actions

Filter: System Default

Resource	Role		Allocation/ETC					
			26.11.2012	27.11.2012	28.11.2012	29.11.2012	30.11.2012	1.12.2012
Martin, Paul	CSK Project Manager	Allocation	8	8	8	8	8	
		ETC	8	8	8	8	8	
Ueberoth, Ed		Allocation	8	8	8	8	8	
		ETC	8	8	8	8	8	

Fig. The Team Detail at daily level

This customized Team detail view illustrate the result of the Clarity automation which sets the daily ETC equal to the daily allocation.

ID	Name	Name	ETC	Loading Pat	Start	Finish	November 2012					December 2012								
							Task	Task	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed		
									Assign	Assign	26	27	28	29	30	01	02	03	04	05
~rmw	ETC_Alloc		80.00		11/26/20	11/30/201														
		Ueberoth, Ed	40.00	Front	11/26/20	11/30/201	8.00	8.00	8.00	8.00	8.00									
		Martin, Paul	40.00	Front	11/26/20	11/30/201	8.00	8.00	8.00	8.00	8.00									
paulMartin	Martin, Paul				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00				
enduser	Ueberoth, Ed				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00				
					Alloc &	Avail														

Fig. Tabulated resource assignment view in OWB.

This customized Resource assignment tabulated OWB view displays the task and assignment dates and ETC. The resource daily allocation is displayed for the project duration and the same field displays the availability outside the project duration.

Project: ETC_Alloc - Team - Staff												Scenario: [--Select--]		Actions
Filter: System Default														
	Resource	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation	Actuals	ETC	Act		
<input type="checkbox"/>	Martin, Paul	CSK Project Manager	✓	Soft	New	26.11.2012	30.11.2012	100,0%	40,00	0,00	0,00			
<input type="checkbox"/>	Ueberoth, Ed		✓	Soft	New	26.11.2012	30.11.2012	100,0%	40,00	0,00	0,00			

Fig. The Team Staff page when the Effort task is removed.

If the effort task is not created there is no automatic ETC when the project team is created.

Project: ETC_Alloc - Team - Detail												Scenario: [--Select--]		Actions
Filter: System Default														
	Resource	Role	Allocation/ETC											
			26.11.2012	27.11.2012	28.11.2012	29.11.2012	30.11.2012	1.12.2012						
<input type="checkbox"/>	Martin, Paul	CSK Project Manager	Allocation ETC	8	8	8	8	8						
<input type="checkbox"/>	Ueberoth, Ed		Allocation ETC	8	8	8	8	8						

Fig. The Team Detail page when the Effort task is removed.

Only the allocation is there

ID	Name	Name	ETC	Loading Pat	Start	Finish	November 2012					December 2012								
							Task	Task	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed		
									Assign	Assign	26	27	28	29	30	01	02	03	04	05
paulMartin	Martin, Paul				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00				
enduser	Ueberoth, Ed				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00				
					Alloc &	Avail														

Fig. The OWB Resource view when the Effort task is removed.

The same is displayed in OWB.

Project: ETC_Alloc | Task: Task1 - Task Properties

General

Name: Task1 Status: Not Started

ID: T1 % Complete: 0%

Start: 26.11.2012 Baseline Start:

Finish: 30.11.2012 Baseline Finish:

Key Task: Priority: 10

Milestone: Exclude from Autoscheduling:

Fixed Duration:

Save Save And Return Return

Assignments

Resource	Resource ID	Role	Start	Finish	Actuals	ETC	Actuals Thru
Martin, Paul	paulMartin	CSK Project Manager	26.11.2012	30.11.2012	0,00	40,00	
Ueberoth, Ed	enduser		26.11.2012	30.11.2012	0,00	40,00	

Fig. The Resources assigned to a task.

When tasks exist in the project and resources are assigned to the task ETC is automatically created in the same manner as with an effort tasks

ID	Name	Name	ETC	Loading Pat	Start	Finish	November 2012					December 2012				
							Task	Task	Task	Task	Task	Task	Task	Task	Task	Task
		Assign			Assign	Assign	Mon 26	Tue 27	Wed 28	Thu 29	Fri 30	Sat 01	Sun 02	Mon 03	Tue 04	Wed 05
T1	Task1		80.00		11/26/20	11/30/201	16.00	16.00	16.00	16.00	16.00					
		Ueberoth, Ed	40.00	Front	11/26/20	11/30/201	8.00	8.00	8.00	8.00	8.00					
		Martin, Paul	40.00	Front	11/26/20	11/30/201	8.00	8.00	8.00	8.00	8.00					
paulMartin	Martin, Paul				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00
enduser	Ueberoth, Ed				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00
					Alloc &	Avail										

Fig. The Team Staff page when the resources are assigned to a task in Clarity.

OWB displays the same as well.

Project: ETC_Alloc | Task: Task1 - Task Properties

General

Name: Task1 Status: Not Started

ID: T1 % Complete: 0%

Start: 26.11.2012 Baseline Start:

Finish: 30.11.2012 Baseline Finish:

Key Task: Priority: 10

Milestone: Exclude from Autoscheduling:

Fixed Duration:

Save Save And Return Return

Assignments

Resource	Resource ID	Role	Start	Finish	Actuals	ETC
Martin, Paul	paulMartin	CSK Project Manager	26.11.2012	30.11.2012	0,00	40,00
Ueberoth, Ed	enduser		26.11.2012	30.11.2012	0,00	40,00

Fig. Trying to remove the automatically created ETC.

The automatic creation of ETC in Clarity goes to the extend that the ETC cannot be removed. If a value removed save restores it.

ID	Name	Name	ETC	Loading Pat	Start	Finish	November 2012					December 2012				
							Task	Task	Task	Task	Task	Task	Task	Task	Task	Task
			Assign		Assign	Assign	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
T1	Task1				11/26/20	11/30/201	26	27	28	29	30	01	02	03	04	05
		Ueberoth, Ed		Front			0.00	0.00	0.00	0.00	0.00					
		Martin, Paul		Front												
paulMartin	Martin, Paul				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00
enduser	Ueberoth, Ed				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00
					Alloc &	Avail										

Fig. The ETC removed in OWB.

In OWB there is no such automation and the ETC can be removed.

To remove or edit the assignment ETC go to the assignment properties.

Project: ETC_Alloc | Task: Task1 - Assignment Properties

General

Resource: Martin, Paul Status: Not Started

Role: CSK Project Manager

Loading Pattern: Front

Start: 26.11.2012

Baseline Start:

Finish: 28.11.2012

Baseline Finish:

ETC: 25,00

Pending ETC:

Actuals: 0,00

Pending Actuals:

EAC: 25,00

Actuals Thru:

ETC Detail

<input type="checkbox"/>	Start	Finish	Value
<input type="checkbox"/>	26.11.2012 <input type="button" value="calendar"/>	28.11.2012 <input type="button" value="calendar"/>	30 <input type="text"/>
<input type="checkbox"/>	<input type="button" value="calendar"/>	<input type="button" value="calendar"/>	<input type="text"/>

Fig. Assignment properties in Clarity.

Clarity v13 provides enhancement to the assignment properties: The ETC is in segments and can be set at daily level. This is not possible in eralier version where only the total assignment ETC can be set and edited.

Project: ETC_Alloc | Task: Task1 - Assignment Properties

General

Resource: Martin, Paul Status: Not Started

Role: CSK Project Manager Loading Pattern: Front

Start: 26.11.2012 Baseline Start:

Finish: 28.11.2012 Baseline Finish:

ETC: 27,00 Pending ETC:

Actuals: 0,00 Pending Actuals:

EAC: 27,00 Actuals Thru:

ETC Detail

<input type="checkbox"/>	Start	Finish	Value
<input type="checkbox"/>	26.11.2012	26.11.2012	8
<input type="checkbox"/>	27.11.2012	27.11.2012	9
<input type="checkbox"/>	28.11.2012	28.11.2012	10
<input type="checkbox"/>			

Fig. Assignment ETC set at daily level in Clarity v.13.

Different from Clarity all versions of OWB support working at daily level of ETC.

ID	Name	Name	ETC	Loading Pat	Start	Finish	November 2012					December 2012				
							Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
			Assign		Assign	Assign	26	27	28	29	30	01	02	03	04	05
T1	Task1				11/26/20	11/30/201	0.00	0.00	0.00	0.00	0.00					
		Ueberoth, Ed		Contour												
		Martin, Paul		Contour												
paulMartin	Martin, Paul				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00
enduser	Ueberoth, Ed				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00

Fig. Resource assignments created in OWB.

If the resources are assigned to the task in OWB not automatic ETC is created. In the example above the task was created in OWB where the default loading pattern is different from the default in Clarity.

ID	Name	Name	ETC	Loading Pat	Start	Finish	November 2012					December 2012				
							Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
			Assign		Assign	Assign	26	27	28	29	30	01	02	03	04	05
T1	Task1		48.00		11/26/20	11/30/201	8.00	8.00	16.00	8.00	8.00					
		Ueberoth, Ed	24.00	Front	11/28/20	11/30/201			8.00	8.00	8.00					
		Martin, Paul	24.00	Front	11/26/20	11/28/201	8.00	8.00	8.00							
paulMartin	Martin, Paul				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00
enduser	Ueberoth, Ed				Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00

Fig. Resource assignment ETC's created in OWB.

When the assignments are made in OWB the ETC can be set at daily level and the assignment starts and finish can be different from the task start and finish. That is as long as the task start equals the start of the first assignment and the task finish equals the finish of the last task.

Project: ETC_Alloc | Task: Task1 - Task Properties

General

Name: Task1 Status: Not Started

ID: T1 % Complete: 0%

Start: 26.11.2012 Baseline Start:

Finish: 30.11.2012 Baseline Finish:

Key Task: Priority: 10

Milestone: Exclude from Autoscheduling:

Fixed Duration:

Buttons: Save, Save And Return, Return

Assignments

	Resource	Resource ID	Role	Start	Finish	Actuals	ETC	Actuals Thru
<input type="checkbox"/>	Martin, Paul	paulMartin	CSK Project Manager	26.11.2012	28.11.2012	0,00	24,00	
<input type="checkbox"/>	Ueberoth, Ed	enduser		28.11.2012	30.11.2012	0,00	24,00	

Fig. The assignment ETC's after saving the project back to Clarity.

When the project is saved to Clarity the dates and ETC of assignment remain unchanged.

Project: ETC_Alloc - Team - Detail Scenario: [--Select--] Actions

Filter: System Default

	Resource	Role		Allocation/ETC					
				26.11.2012	27.11.2012	28.11.2012	29.11.2012	30.11.2012	1.12.2012
<input type="checkbox"/>	Martin, Paul	CSK Project Manager	Allocation	8	8	8	8	8	
			ETC	8	8	8			
<input type="checkbox"/>	Ueberoth, Ed		Allocation	8	8	8	8	8	
			ETC			8	8	8	

Fig. The ETC's in Team Detail view.

That can be seen at daily level in the Team Detail view

Project: ETC_Alloc - Team - Staff Scenario: [--Select--] Actions

Filter: System Default

	Resource	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation	Actuals	ETC	Actu
<input type="checkbox"/>	Martin, Paul	CSK Project Manager	✓	Soft	New	26.11.2012	30.11.2012	100,0%	40,00	0,00	24,00	
<input type="checkbox"/>	Ueberoth, Ed		✓	Soft	New	26.11.2012	30.11.2012	100,0%	40,00	0,00	24,00	

Fig. The ETC's in Team Staff view.

and summarized in the Team Staff view.

Investment: ETC_Alloc | Resource: Paul Martin - Staff Member Properties

General

Requirement Name: Martin, Paul Resource/Role: Martin, Paul

Start Date: Investment Start Date: 26.11.2012

Finish Date: Investment Finish Date: 30.11.2012

Default Allocation %: 100,00%

Investment Role: CSK Project Manager

Staff OBS Unit:

Booking Status: Soft

Request Status: New (Read-only if any pending Requisitions)

Open for Time Entry:

Resource Search

Resource Employment Type: [--Select--]

Planned Allocation			Hard Allocation				
<input type="checkbox"/>	Start	Finish	% Allocation	<input type="checkbox"/>	Start	Finish	% Allocation
<input type="checkbox"/>	26.11.2012	30.11.2012	100,00%	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Fig. The default allocation.

This far the allocation have not been touched. That is the allocation is at 100 % of the availability for the full duration of the project. Now the actual allocations are changed to 0 % (which is different form default) and the resources are hard booked. In Clarity, because of the automation, this would prevent creation of any ETC.

General

Requirement Name: Martin, Paul Resource/Role: Martin, Paul

Start Date: Investment Start Date: 26.11.2012

Finish Date: Investment Finish Date: 30.11.2012

Default Allocation %: 100,00% Investment Role: CSK Project Manager

Booking Status: Hard Staff OBS Unit:

Request Status: Booked (Read-only if any pending Requisitions) Open for Time Entry:

Resource Search

Resource Employment Type: [--Select--]

Planned Allocation			Hard Allocation				
<input type="checkbox"/>	<input checked="" type="checkbox"/> Start	<input checked="" type="checkbox"/> Finish	<input type="checkbox"/>	<input checked="" type="checkbox"/> Start	<input checked="" type="checkbox"/> Finish	<input type="checkbox"/>	<input checked="" type="checkbox"/> % Allocation
<input type="checkbox"/>	26.11.2012	30.11.2012	<input type="checkbox"/>	26.11.2012	30.11.2012	<input type="checkbox"/>	0,00%
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

Fig. The 0,00 allocation hard booked.

ID	Name	Name	ETC	Loading Pat	Start	Finish	marraskuu 2012					joulukuu 2012				
							ma	ti	ke	to	pe	la	su	ma	ti	ke
			Assign		Assign	Assign	26	27	28	29	30	01	02	03	04	05
T1	Task1		48,00		26.11.20	30.11.201	8,00	8,00	16,00	8,00	8,00					
		Ueberoth, Ed	24,00	Front	28.11.20	30.11.201			8,00	8,00	8,00					
		Martin, Paul	24,00	Front	26.11.20	28.11.201	8,00	8,00	8,00							
paulMartin	Martin, Paul				Alloc &	Avail	0,00	0,00	0,00	0,00	0,00	0,00	0,00	8,00	8,00	8,00
enduser	Ueberoth, Ed				Alloc &	Avail	0,00	0,00	0,00	0,00	0,00	0,00	0,00	8,00	8,00	8,00

Fig. The OWB view after 0,00 allocation is hard booked.

OWB displays the hard booked 0,00 allocation for the project duration, but outside that the default availability is displayed. Because the ETC assigned is higher than the availability/allocation OWB turns on the yellow highlight. That is just for the information of the project manager. As in the view the project manager can set the ETC the be higher than the availability. The ETC in the screenshot was set before the 0,00 allocation was hard booked.

ID	Name	Name	ETC	Loading Pat	Start	Finish	marraskuu 2012					joulukuu 2012				
							ma	ti	ke	to	pe	la	su	ma	ti	ke
			Assign		Assign	Assign	26	27	28	29	30	01	02	03	04	05
T1	Task1		66,00		26.11.20	30.11.201	10,00	10,00	22,00	12,00	12,00					
		Ueberoth, Ed	36,00	Front	28.11.20	30.11.201			12,00	12,00	12,00					
		Martin, Paul	30,00	Front	26.11.20	28.11.201	10,00	10,00	10,00							
paulMartin	Martin, Paul				Alloc &	Avail	0,00	0,00	0,00	0,00	0,00	0,00	0,00	8,00	8,00	8,00
enduser	Ueberoth, Ed				Alloc &	Avail	0,00	0,00	0,00	0,00	0,00	0,00	0,00	8,00	8,00	8,00

Fig. Resources overallocated in OWB.

But even the the project manager can set ETC's higher than the availability and they are also saved to Clarity and can be see at the assignment summary level in the Team Staff view.

Project: ETC_Alloc - Team - Staff Scenario: [--Select--] Actions

Filter: System Default

	Resource	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation	Actuals	ETC	Actuals
<input type="checkbox"/>	Martin, Paul	CSK Project Manager	✓	Hard	Booked	26.11.2012	30.11.2012	100,0%	0,00	0,00	30,00	
<input type="checkbox"/>	Ueberoth, Ed		✓	Hard	Booked	26.11.2012	30.11.2012	100,0%	0,00	0,00	36,00	

Fig. The project saved back to Clarity with overallocations.

and at daily level in the Team Detail view, but there is no highlight to warn the project manager.

Project: ETC_Alloc - Team - Detail Scenario: [--Select--]

Locked by: pmo tester Unlock

Filter: System Default

	Resource	Role	Allocation/ETC	Allocation/ETC						
				26.11.2012	27.11.2012	28.11.2012	29.11.2012	30.11.2012	1.12.2012	
<input type="checkbox"/>	Martin, Paul	CSK Project Manager	Allocation ETC	10	10	10				
<input type="checkbox"/>	Ueberoth, Ed		Allocation ETC			12	12	12		

Fig. The daily level overallocation of resources in Team Detail.

Displaying ETC on timesheets

Going back to the question which originated all this: How to display ETC on timesheets now we know when the assignments start and ends and how much ETC is on each day.

Timesheet

Time Period: 26.11.2012 - 2.12.2012

Resource Name: Ed Ueberoth Modified by: Martti AD Kinnunen

Timesheet Status: Open Last Modified: 27.11.2012 23:34

Investment	Description	Input Type Code	Charge Code	Mon 26.11	Tue 27.11	Wed 28.11	Thu 29.11	Fri 30.11	Sat 1.12	Sun 2.12
ETC_Alloc	Task1									0,00
	Total			Mon, 26.11, ETC_Alloc, Task1, ETC: 0,00				0,00	0,00	0,00

Fig. The ETC displayed outside the assignment time range on the timesheet.

When the assignment starts on November 28th howevering the cursor over November the 26th displays 0,00 ETC while nothing is displayed in Clarity or OWB for that day as ETC for that resource assignment.

Timesheet

Time Period: 26.11.2012 - 2.12.2012

Resource Name: Ed Ueberoth Modified by: Martti AD Kinnunen

Timesheet Status: Open Last Modified: 27.11.2012 23:34

Investment	Description	Input Type Code	Charge Code	Mon 26.11	Tue 27.11	Wed 28.11	Thu 29.11	Fri 30.11	Sat 1.12	Sun 2.12
Tasks										
<input type="checkbox"/>	ETC_Alloc	Task1								
		Total		0,00	0,00	0,00	8,00	0,00	0,00	0,00
							Thu, 29.11, ETC_Alloc, Task1, ETC: 8,00			

Fig. The ETC displayed in the assignment time range on the timesheet.

For November 29th 8,00 hrs of ETC is displayed (as was set before the over allocation) as expected.

Conclusion

When a resource is assigned to a task in Clarity ETC is automatically created at the default allocation rate for the whole duration of the task.

In OWB the project manager can set the assignment freely and the assignment start and finish can be different from the task start and finish if there are more than one resource assigned to the task.

Hovering the cursor of the the timesheet dell will display the ETC set for the day or 0,00 if the day is not the assignment time range or the ETC is set to zero.

REVISIONS

v.02 November 29 2012

Added assignment edit

The content of these pages is presented as personal views only and not as any sort of advice or instruction.