

# 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 summarized 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	Actual
<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 Effor task.

Project: ETC\_Alloc - Tasks - Task List

 Open in Scheduler

Scenario: [--Select--]

Actions

Filter: None

	Task ▲	ID	Start	Finish	% Complete	ETC
<input type="checkbox"/>	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

					Allocation/ETC						
Resource		Role			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	8	8			
<input type="checkbox"/>	  Ueberoth, Ed	 	Allocation	8	8	8	8	8			
			ETC	8	8	8	8	8			

Fig. The Tem 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		ETC		Start	Finish	November 2012					December 2012				
		Name	Task	Loading Pat	Task	Task	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
			Assign		Assign	Assign	26	27	28	29	30	01	02	03	04	05
~rmw	ETC_Alloc		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. 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		ETC		Start	Finish	November 2012					December 2012				
		Name	Task	Loading Pat	Task	Task	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
			Assign		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:

Priority: 10

Key Task: ☐

Milestone: ☐

Fixed Duration: ☐

Exclude from Autoscheduling: ☐

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	30.11.2012	0,00	40,00	
<input type="checkbox"/>	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	ETC	Start	Finish	November 2012					December 2012				
	Name	Task	Loading Pat	Task	Task	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue
		Assign		Assign	Assign	26	27	28	29	30	01	02	03	04
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
enduser	Ueberoth, Ed			Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	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  
 ★ ID: T1  
 ★ Start: 26.11.2012  
 ★ Finish: 30.11.2012  
 Key Task: ☐  
 Milestone: ☐  
 Fixed Duration: ☐

Status: Not Started  
 % Complete: 0%  
 Baseline Start:  
 Baseline Finish:  
 Priority: 10  
 Exclude from Autoscheduling: ☐

Save Save And Return Return

**Assignments**

	Resource	Resource ID	Role	Start	Finish	Actuals	ETC	A
<input type="checkbox"/>	Martin, Paul	paulMartin	CSK Project Manager	26.11.2012	30.11.2012	0,00	40,00	
<input type="checkbox"/>	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	ETC	Start	Finish	November 2012					December 2012				
	Name	Task	Loading Pat	Task	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
		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	Front											
		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
enduser	Ueberoth, Ed			Alloc &	Avail	8.00	8.00	8.00	8.00	8.00	0.00	0.00	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 	28.11.2012 	30 
<input type="checkbox"/>			

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**

	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		ETC	Loading Pat	Start		November 2012					December 2012				
		Name			Task	Task	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		ETC	Loading Pat	Start		November 2012					December 2012				
		Name			Task	Task	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:

Priority: 10

Key Task: ☐

Milestone: ☐

Fixed Duration: ☐

Exclude from Autoscheduling: ☐

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	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	<input type="text"/>	Investment Start Date	26.11.2012
Finish Date	<input type="text"/>	Investment Finish Date	30.11.2012
Default Allocation %	100,00%	Investment Role	CSK Project Manager
Booking Status	Soft	Staff OBS Unit	
Request Status	New	Open for Time Entry	<input checked="" type="checkbox"/>

(Read-only if any pending Requisitions)

**Resource Search**

Resource Employment Type: [--Select--]

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

Fig. The 0,00 allocation hard booked.

ID	Name	Name	ETC		Start	Finish	marraskuu 2012					joulukuu 2012				
			Task	Loading Pat	Task	Task	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		Start	Finish	marraskuu 2012					joulukuu 2012				
			Task	Loading Pat	Task	Task	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 

					Allocation/ETC					
	Resource		Role		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 Deatail.

## 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
<input type="checkbox"/>	ETC_Alloc Task1									0,00
	Total							0,00	0,00	0,00

Mon, 26.11, ETC\_Alloc, Task1, ETC: 0,00

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

When the assignment starts on November 28<sup>th</sup> howevring the cursor over November the 26<sup>th</sup> 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 29<sup>th</sup> 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.

Howering the cursor of the the timesheet dell will display the ETC set for the day or 0,00 if the day is not the assigment 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.