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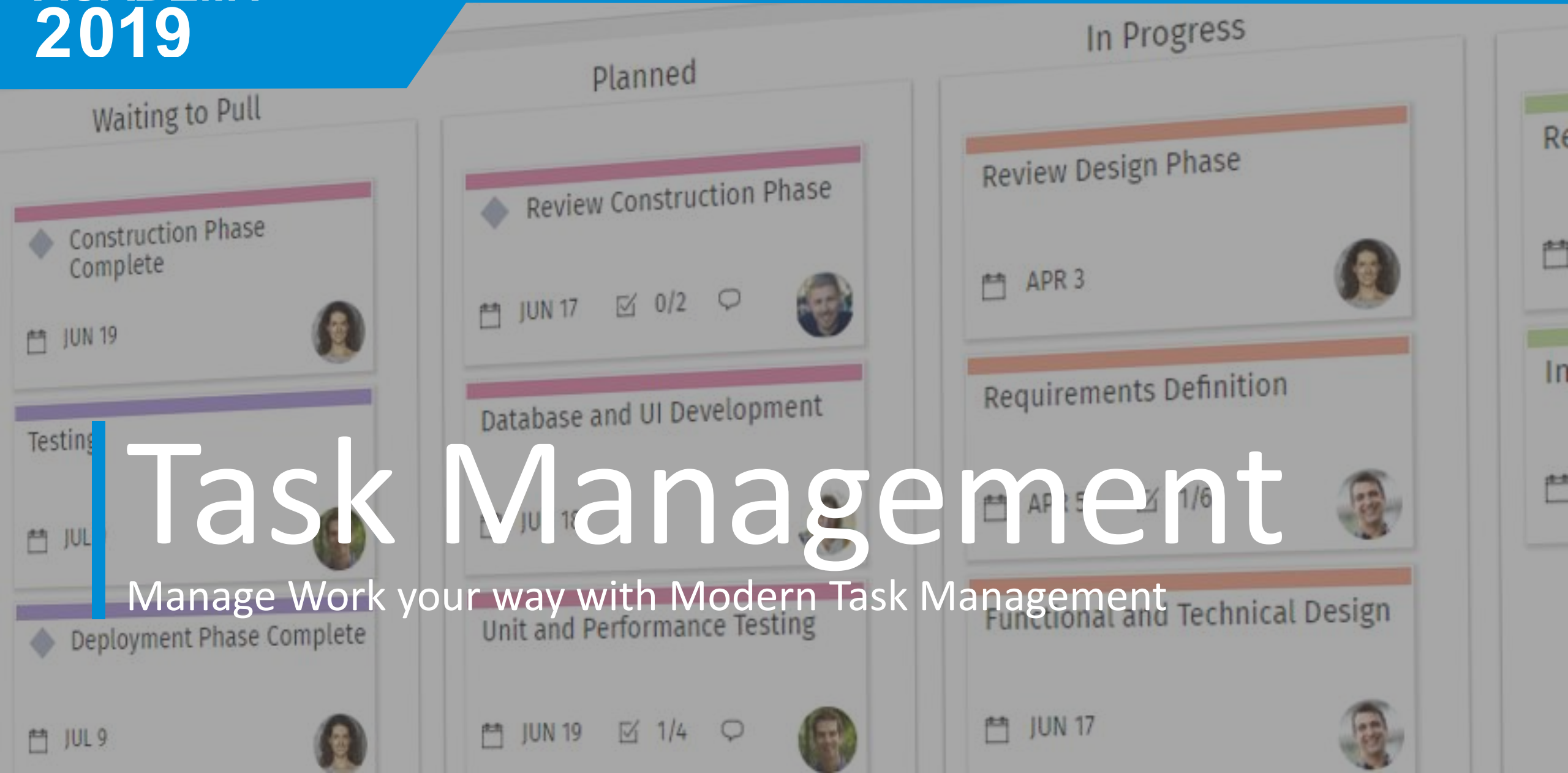


# Task Management

Manage Work your way with Modern Task Management

# Introductions

Clarity PPM Task Management

SENIOR FUNCTIONAL CONSULTANT

# STEPHEN DENNY

2011 - TODAY

## About Me

Birmingham born and bred
Worked for BT for 30 years before joining Pemari in 2011
CIMA qualified
Worked with Clarity/Niku since 2001
Club Secretary and Finance Director of Alvechurch F.C.
West Bromwich Albion season ticket holder

# Agenda

Clarity PPM Task Management

# Session Agenda

Clarity PPM Task Management

- The Tasks Page
- My Tasks
- Project Tasks - Views
- Tasks – Jaspersoft Reports

# The Tasks Page

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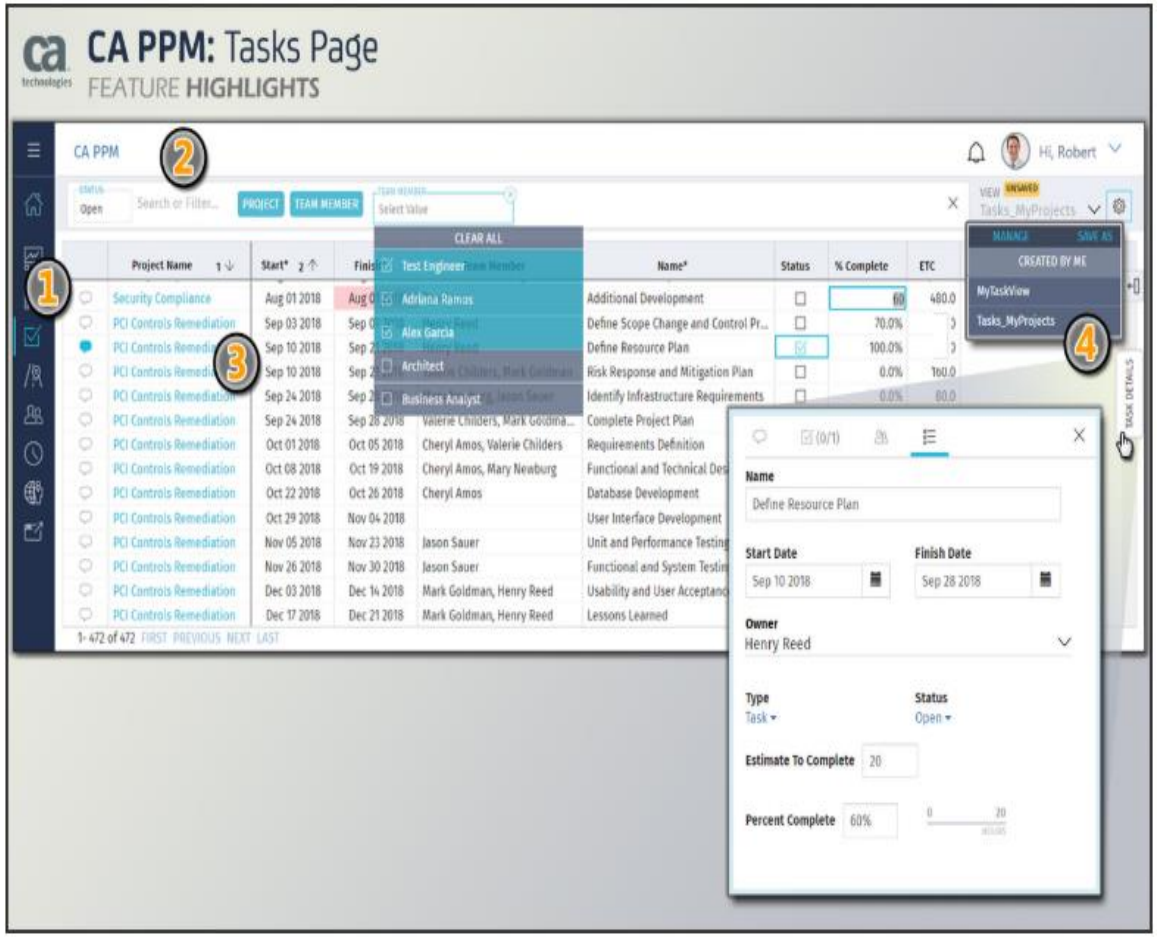
# The Tasks Page

The primary context for the Tasks page is to show PM's all the tasks for assigned team members on selected projects.

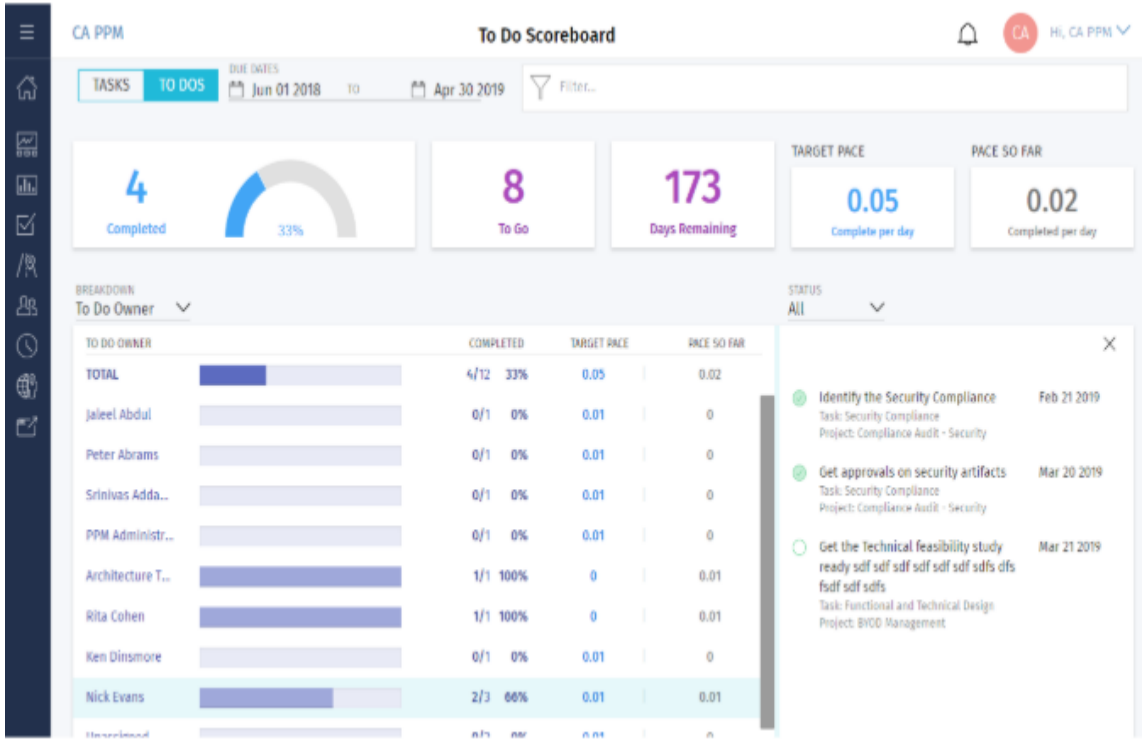
1. **Click Tasks** in the Main Menu
2. **Apply Filters** – Filter on project, task status and team member
3. **Update Tasks** - you can update tasks directly in the grid or in the details panel. The blue shaded conversation icon indicates where comments have been made.
4. **Personalize the Task Grid** - You can sort, pin columns, and filter your tasks. The Tasks page also provides the following additional features not available on the My Tasks page:
   - To show or hide task attributes as grid columns, click **Column Panel**.
   - You can also save and manage shared views that you and other users create.
   - To open the task details panel, click the **TASK DETAILS** button. Conversations, to-do items, and the Staff tab are also available.



# To Do Scoreboard

Track the progress of Task To-Do items for tasks broken down into to-do items.

1. In the main menu, click **Tasks**.
2. Filter by project, project status, or team member.
3. On the **TASKS | TO DOS** toggle button, click **TO DOS** (to-do items).
4. Specify a date range for to-do item due dates.
5. Apply filters by project, task owner, or to-do owner.
6. In the **BREAKDOWN** field, indicate how you want to arrange the detailed to-do item data.
7. Scan the available metrics to determine if any adjustments are necessary.
    - The metrics shift based on your filters and the date range you define for the start and end due dates.
    - To-do items with no due date inherit the finish date of their parent task.
    - You can sort the columns by clicking on the labels for **To Do Owner**, **Completed**, **Target Pace**, and **Pace So Far**.



# My Tasks

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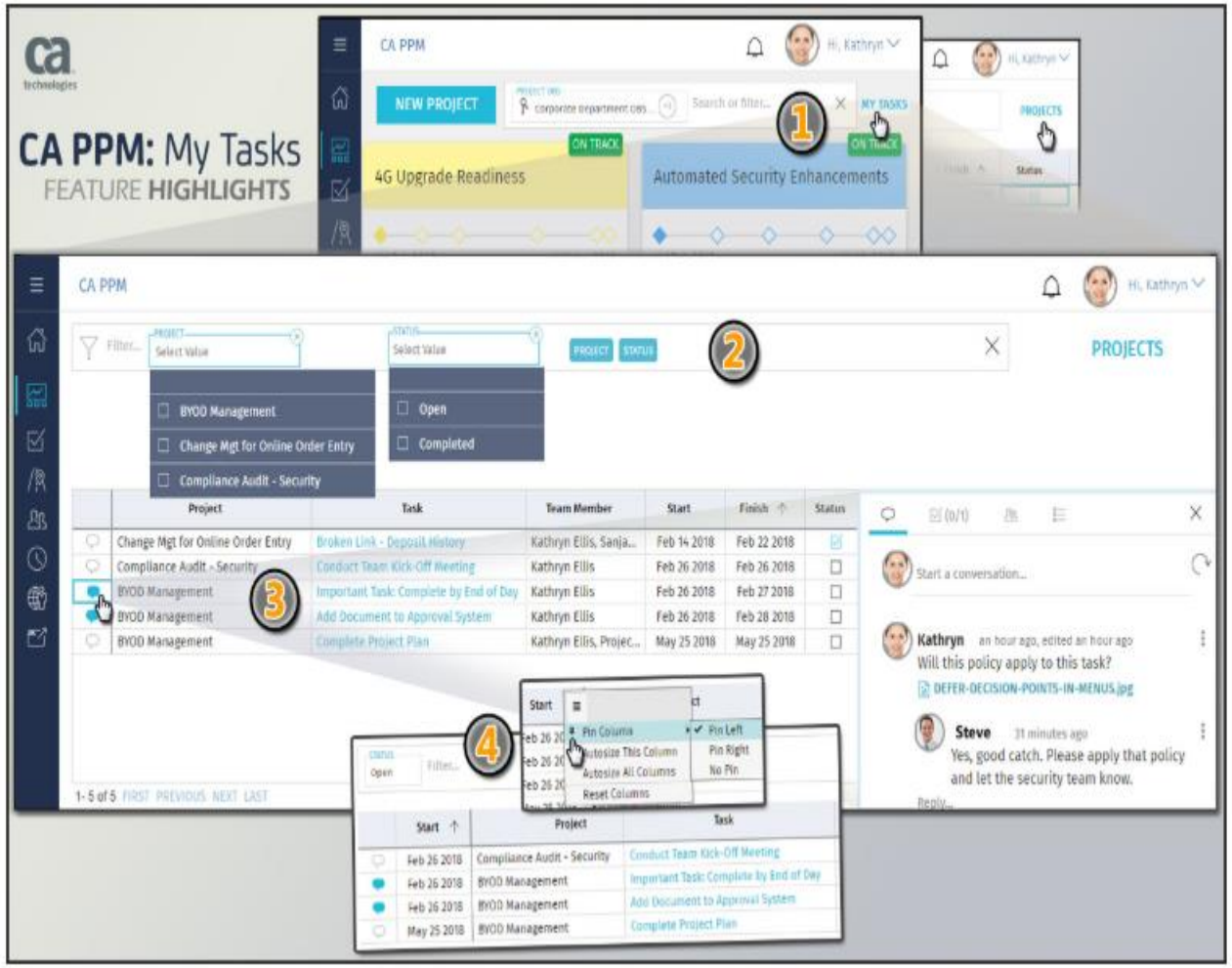
# My Tasks

The primary context for the My Tasks page is to show all the tasks for “you” as a team member on all your assigned projects

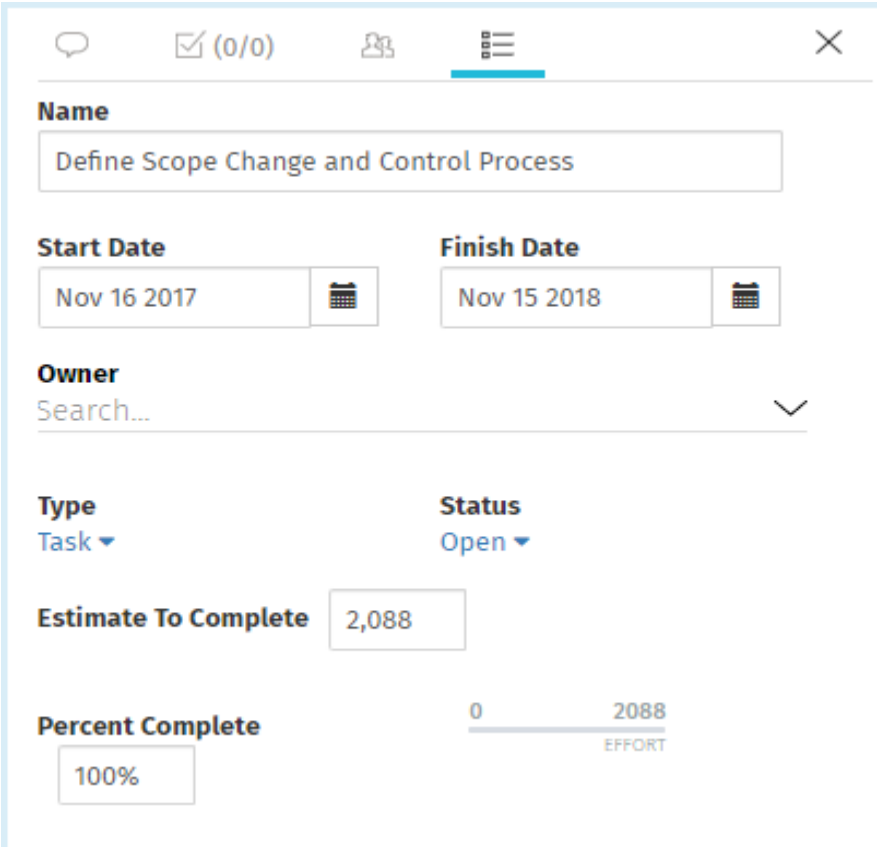
1. **Click My Tasks** on the Projects page
2. **Apply Filters** – the project filter only shows projects where you have at least one assigned task. The Status filter can be used to display open or completed tasks
3. **Update Tasks** – You can update tasks in the grid
   - The blue shaded conversation icon tells you other comments were already made. Click the conversation icon to start a new conversation or reply to the last comment. The to-do list, assigned staff, and task details tabs also appear.
   - When a task is finished, you can mark it complete directly in the **Status** column.
   - As a team member viewing your own tasks, when you click a task you see it inside its parent project on the project task list or task board.
   - As a project manager viewing the My Tasks page, when you click a task, the application opens the default tabbed page for the parent project.
4. **Personalize the My Tasks list** - You can sort on a single column, resize columns, drag-and-drop to reorder columns, and pin columns left or right.



# Personalize the My Tasks Page

1. As a team member, click **Projects** in the main menu and click **My Tasks**.
2. Click the Conversation icon to open the details pane:
   - **Conversations**: Start a conversation or comment on a task.
   - **To Do**: Update a to-do item for the task.
   - **Staff**: View, add, or contact staff members by email.
   - **Details**: Edit the task name, owner, status, or start and finish dates.
3. To hide or show columns in the task grid, click **Columns Panel**.
4. Apply one or more search filters at the top of the page.
5. Select a view from the **VIEW** menu at top right or click **SAVE AS** to save your current view including filters, columns, sort, and pinned or grouped attributes.
6. To open the parent project for the task, click the name of the task.
   The project Tasks board or list view appears.
7. Change the unit of measure as follows:
   - Click the drop-down menu next to your avatar and login and select **Settings**.
   - Click **General** to change the unit of measure from FTE to Hours.

Any actuals, ETC, and total effort values are updated on the grid.



# Project Tasks – Views

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# Project Tasks

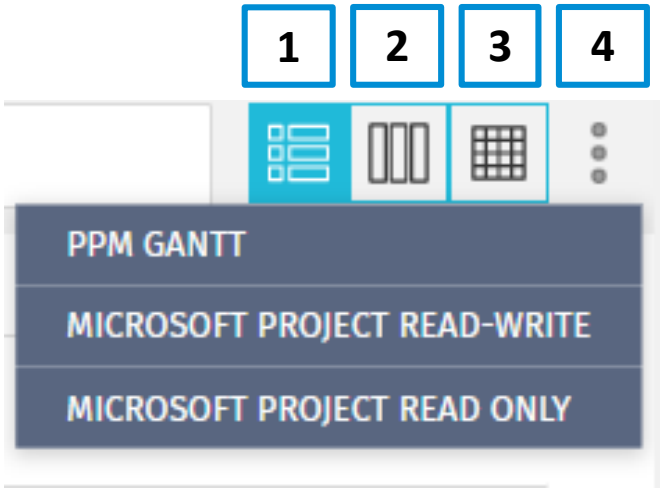
Project tasks identify the work that is required to complete a project.

- The Work Breakdown Structure (WBS) for a project includes phases, milestones, and tasks.
- You can also break down tasks into to-do items.
- A phase groups related tasks and milestones under it and displays the aggregated actuals and ETC for the tasks.
- Milestones help you track and measure progress.
- Tasks have a defined start date and end date, and a period in between when the work is performed.
- Project managers typically assign staff members to tasks and set milestones to measure their progress

# Project Tasks Views

There are various ways of viewing/managing tasks within projects

1. By default, the project tasks appear in a List View on the Tasks page.
2. Click Board View on the top right of the page to view the task board. In the Board View, the tasks appear as cards organized by columns
3. Click Grid View on the top right of the page to view the task grid. In the Grid View, the tasks appear as rows of data.
4. You can also open tasks in a Gantt view or optional integrated scheduler directly from this page (eg MSP).



# Tasks – List View

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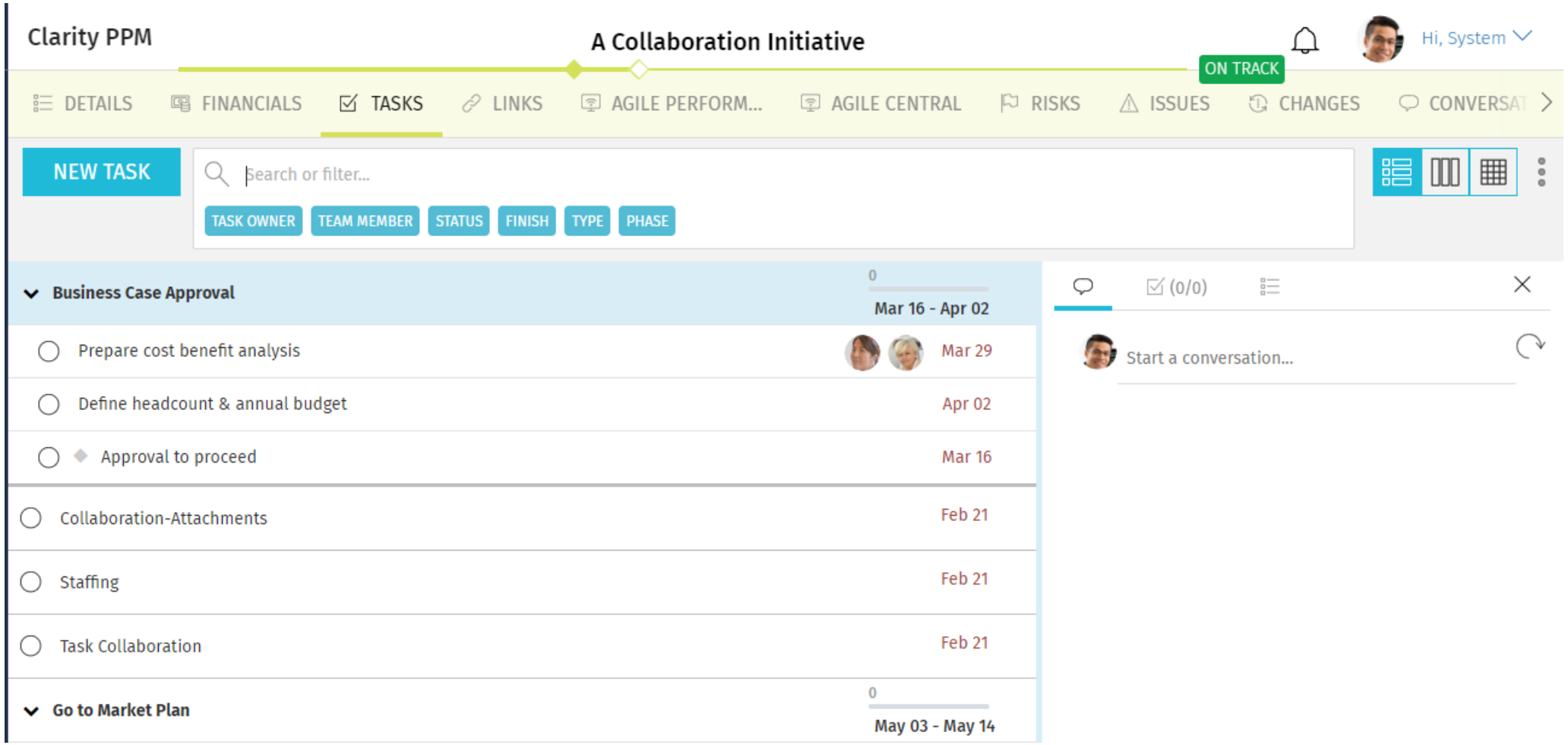
# Tasks List View



# Tasks – Board View

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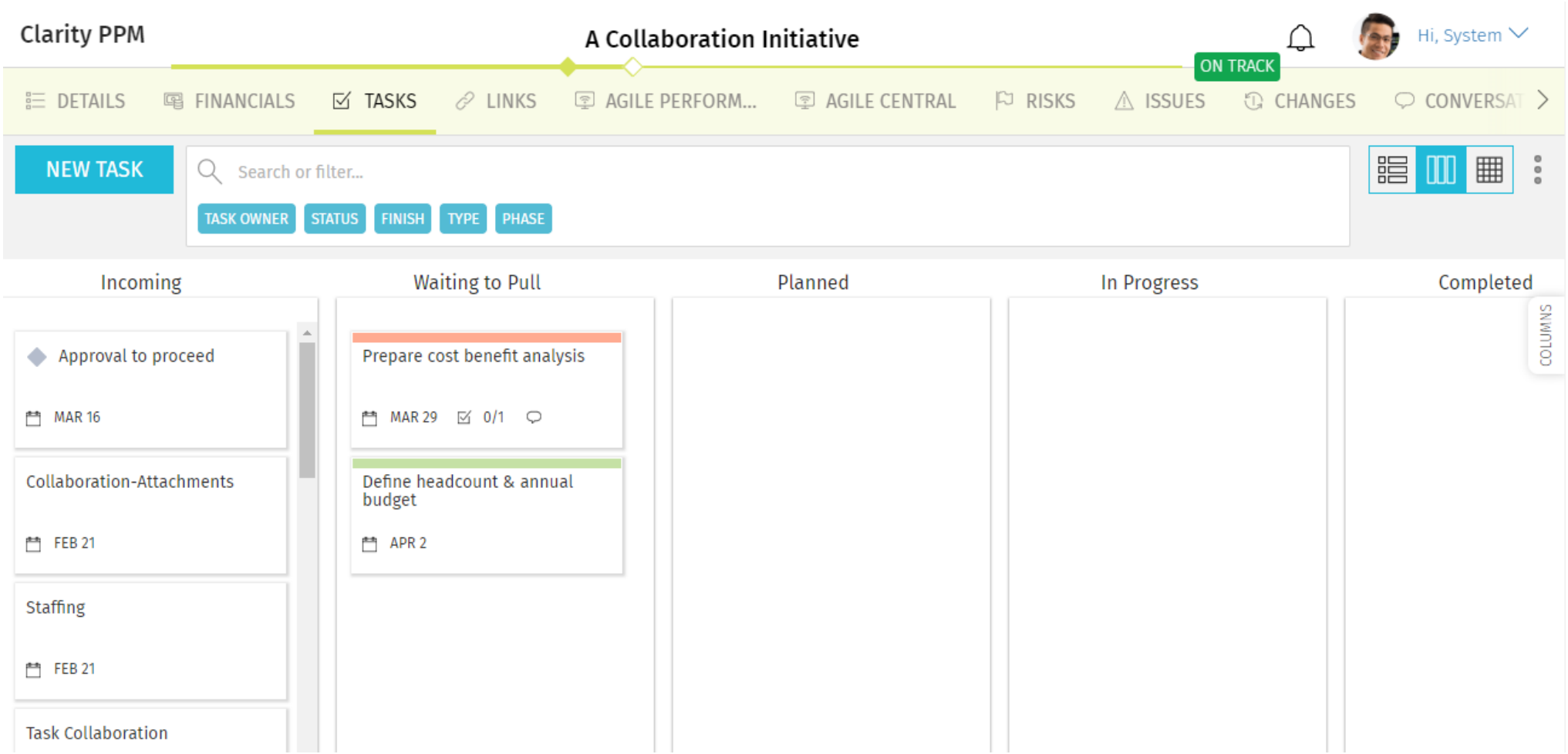
# Tasks Board View



# Tasks – Grid View

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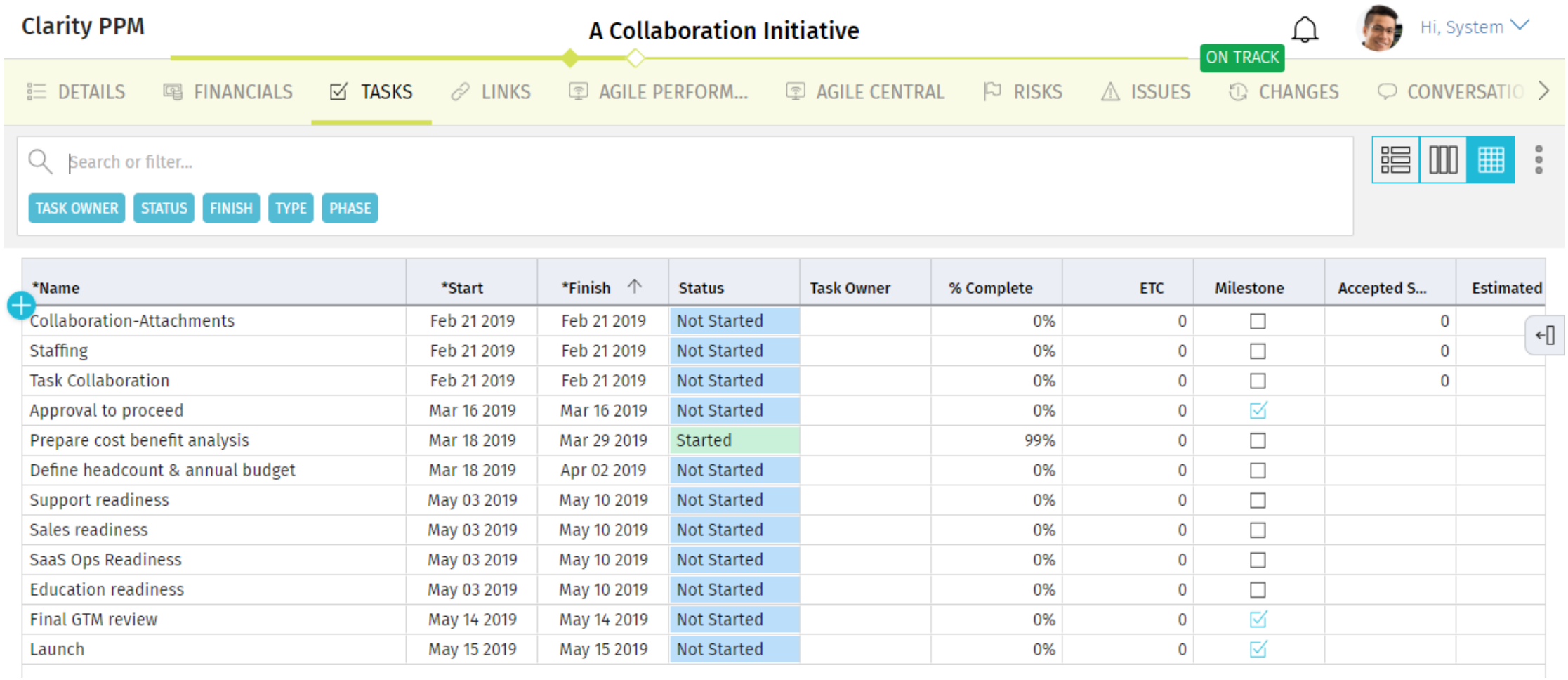
# Tasks Grid View




| *Name | *Start | *Finish | Status | Task Owner | % Complete | ETC | Milestone | Accepted S... | Estimated |
|---|---|---|---|---|---|---|---|---|---|
| Collaboration-Attachments | Feb 21 2019 | Feb 21 2019 | Not Started | | 0% | 0 | ☐ | 0 | |
| Staffing | Feb 21 2019 | Feb 21 2019 | Not Started | | 0% | 0 | ☐ | 0 | |
| Task Collaboration | Feb 21 2019 | Feb 21 2019 | Not Started | | 0% | 0 | ☐ | 0 | |
| Approval to proceed | Mar 16 2019 | Mar 16 2019 | Not Started | | 0% | 0 | ☑ | | |
| Prepare cost benefit analysis | Mar 18 2019 | Mar 29 2019 | Started | | 99% | 0 | ☐ | | |
| Define headcount & annual budget | Mar 18 2019 | Apr 02 2019 | Not Started | | 0% | 0 | ☐ | | |
| Support readiness | May 03 2019 | May 10 2019 | Not Started | | 0% | 0 | ☐ | | |
| Sales readiness | May 03 2019 | May 10 2019 | Not Started | | 0% | 0 | ☐ | | |
| SaaS Ops Readiness | May 03 2019 | May 10 2019 | Not Started | | 0% | 0 | ☐ | | |
| Education readiness | May 03 2019 | May 10 2019 | Not Started | | 0% | 0 | ☐ | | |
| Final GTM review | May 14 2019 | May 14 2019 | Not Started | | 0% | 0 | ☑ | | |
| Launch | May 15 2019 | May 15 2019 | Not Started | | 0% | 0 | ☑ | | |

# Tasks – Gantt View

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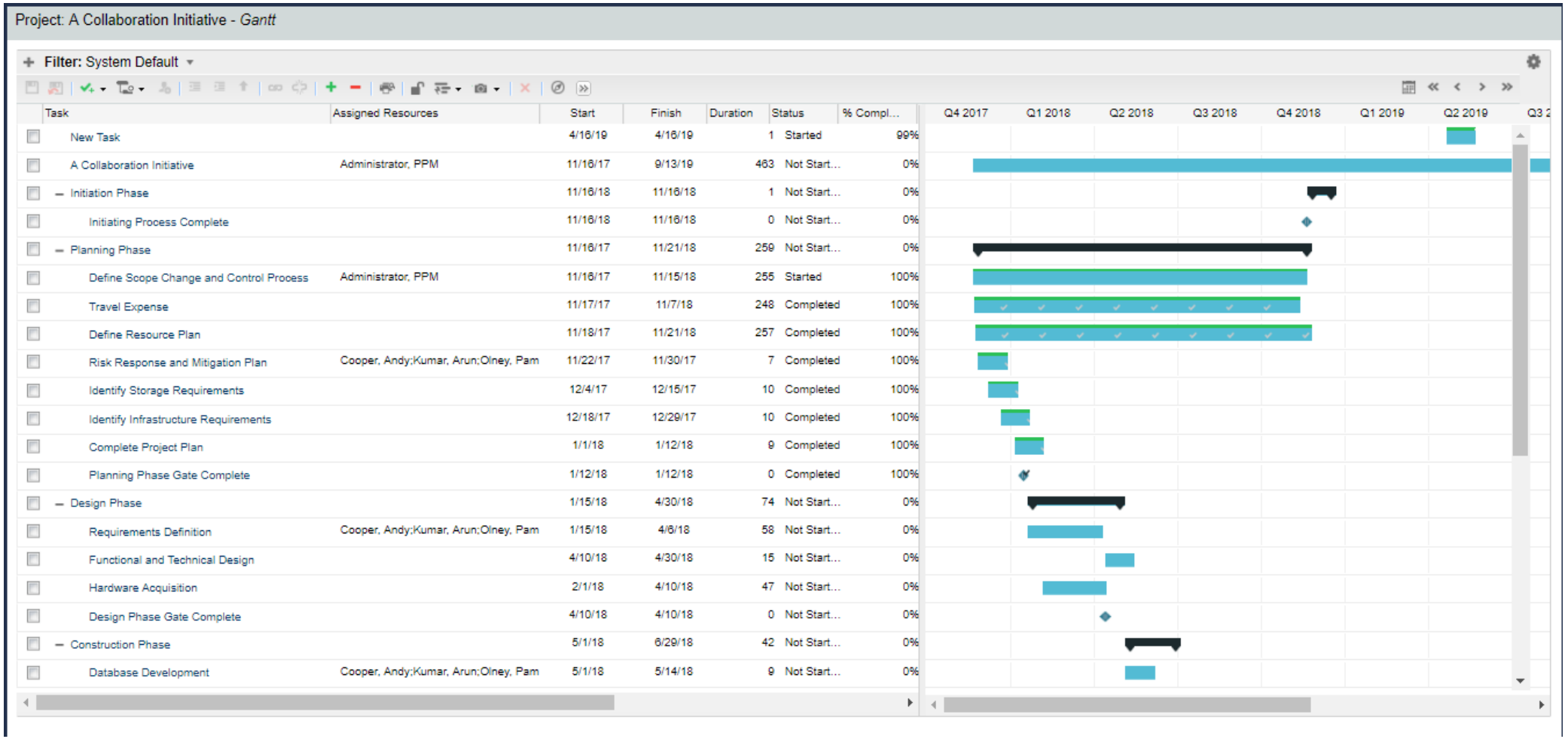
# Tasks Gantt View



# Tasks – Jaspersoft Reports

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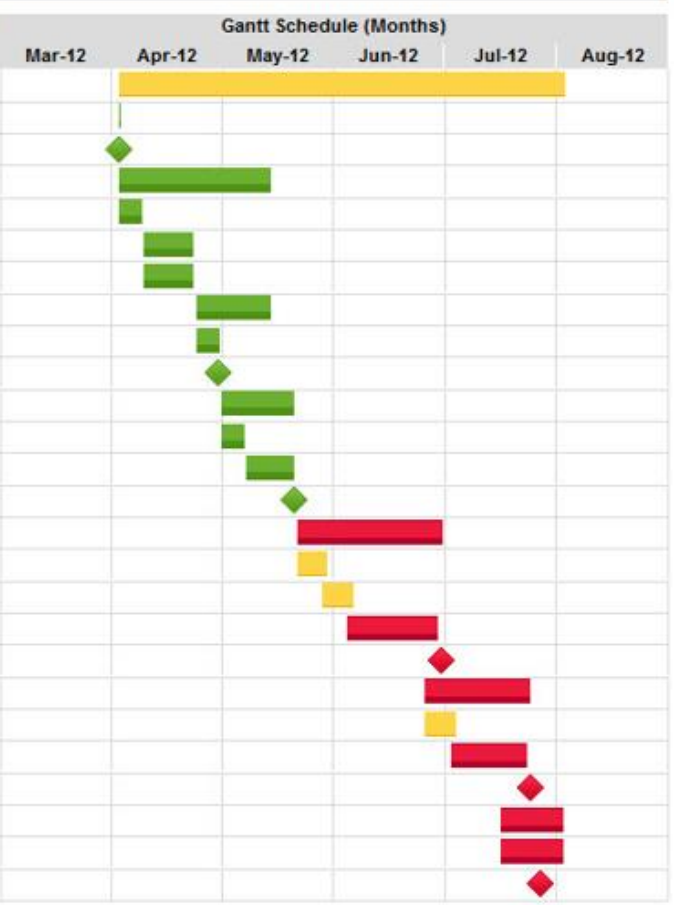
# Project Schedule

## Project Schedule

| Project/WBS/Resource | Start | Finish | Schedule % | Days Late |
|---|---|---|---|---|
| **Online Customer Release** | **4/3/2012** | **8/3/2012** | | **11** |
| Initiation Phase | 4/3/2012 | 4/3/2012 | | 0 |
| Initiating Process Complete | 4/3/2012 | 4/3/2012 | | 0 |
| Planning Phase | 4/3/2012 | 5/14/2012 | | 0 |
| Define Scope Change and Control Process | 4/3/2012 | 4/9/2012 | | 0 |
| Define Resource Plan | 4/10/2012 | 4/23/2012 | | 0 |
| Risk Response and Mitigation Plan | 4/10/2012 | 4/23/2012 | | 0 |
| Identify Infrastructure Requirements | 4/24/2012 | 5/14/2012 | | 0 |
| Complete Project Plan | 4/24/2012 | 4/30/2012 | | 0 |
| Planning Phase Gate Complete | 4/30/2012 | 4/30/2012 | | 0 |
| Design Phase | 5/1/2012 | 5/21/2012 | | 0 |
| Requirements Definition | 5/1/2012 | 5/7/2012 | | 0 |
| Functional and Technical Design | 5/8/2012 | 5/21/2012 | | 0 |
| Design Phase Gate Complete | 5/21/2012 | 5/21/2012 | | 0 |
| Construction Phase | 5/22/2012 | 6/30/2012 | | 5 |
| Database Development | 5/22/2012 | 5/30/2012 | | 2 |
| User Interface Development | 5/29/2012 | 6/6/2012 | | 2 |
| Unit and Performance Testing | 6/5/2012 | 6/29/2012 | | 4 |
| Construction Phase Gate Complete | 6/30/2012 | 6/30/2012 | | 5 |
| Deployment and Quality Phase | 6/26/2012 | 7/25/2012 | | 9 |
| Functional and System Testing | 6/26/2012 | 7/4/2012 | | 2 |
| Usability and User Acceptance Testing | 7/3/2012 | 7/24/2012 | | 8 |
| Deployment Phase Gate Complete | 7/25/2012 | 7/25/2012 | | 9 |
| Closing Phase | 7/17/2012 | 8/3/2012 | | 11 |
| Lessons Learned | 7/17/2012 | 8/3/2012 | | 11 |
| Closing Phase Gate Complete | 7/28/2012 | 7/28/2012 | | 5 |



# Project Cost and Effort

## Project Cost and Effort

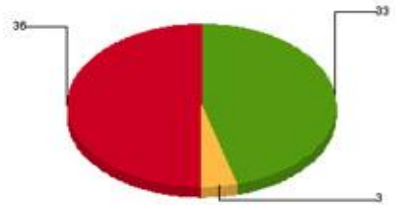
| Project/WBS/Resource | BAC Cost | Actual Cost | EAC Cost | Projected Cost Variance | Projected Cost Variance % | BAC | Actuals | EAC | Projected Effort Variance | Projected Effort Variance % |
|---|---|---|---|---|---|---|---|---|---|---|
| **eCommerce Portal** | **646,000.00** | **106,600.00** | **664,100.00** | **18,100.00** | | **3,992.00** | **664.00** | **4,112.00** | **120.00** | |
| Planning Phase | 77,200.00 | 77,200.00 | 77,200.00 | 0.00 | | 468.00 | 468.00 | 468.00 | 0.00 | |
| Define Scope Change Process | 1,600.00 | 1,600.00 | 1,600.00 | 0.00 | | 8.00 | 8.00 | 8.00 | 0.00 | |
| Travel Expense | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 | 0.00 | |
| Define Resource Plan | 16,000.00 | 16,000.00 | 16,000.00 | 0.00 | | 80.00 | 80.00 | 80.00 | 0.00 | |
| Risk Response and Mitigation Plan | 27,000.00 | 27,000.00 | 27,000.00 | 0.00 | | 180.00 | 180.00 | 180.00 | 0.00 | |
| Identify Storage Requirements | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 | 0.00 | |
| Identify Infrastructure Requirements | 6,600.00 | 6,600.00 | 6,600.00 | 0.00 | | 40.00 | 40.00 | 40.00 | 0.00 | |
| Complete Project Plan | 26,000.00 | 26,000.00 | 26,000.00 | 0.00 | | 160.00 | 160.00 | 160.00 | 0.00 | |
| Planning Phase Gate Complete | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 | 0.00 | |
| Design Phase | 362,500.00 | 29,400.00 | 374,300.00 | 11,800.00 | | 2,114.00 | 196.00 | 2,194.00 | 80.00 | |
| Requirements Definition | 286,000.00 | 29,400.00 | 297,800.00 | 11,800.00 | | 1,884.00 | 196.00 | 1,964.00 | 80.00 | |
| Functional and Technical Design | 36,500.00 | 0.00 | 36,500.00 | 0.00 | | 230.00 | 0.00 | 230.00 | 0.00 | |
| Hardware Acquisition | 40,000.00 | 0.00 | 40,000.00 | 0.00 | | 0.00 | 0.00 | 0.00 | 0.00 | |
| Design Phase Gate Complete | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 | 0.00 | |
| Construction Phase | 127,300.00 | 0.00 | 133,600.00 | 6,300.00 | | 910.00 | 0.00 | 950.00 | 40.00 | |
| Database Development | 12,000.00 | 0.00 | 12,000.00 | 0.00 | | 80.00 | 0.00 | 80.00 | 0.00 | |
| User Interface Development | 6,000.00 | 0.00 | 6,000.00 | 0.00 | | 40.00 | 0.00 | 40.00 | 0.00 | |
| Unit and Performance Testing | 109,300.00 | 0.00 | 115,600.00 | 6,300.00 | | 790.00 | 0.00 | 830.00 | 40.00 | |
| Construction Phase Gate Complete | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 | 0.00 | |
| Deployment and Quality Phase | 65,000.00 | 0.00 | 65,000.00 | 0.00 | | 420.00 | 0.00 | 420.00 | 0.00 | |
| Functional and System Testing | 17,000.00 | 0.00 | 17,000.00 | 0.00 | | 120.00 | 0.00 | 120.00 | 0.00 | |
| Usability and User Acceptance Testing | 14,000.00 | 0.00 | 14,000.00 | 0.00 | | 80.00 | 0.00 | 80.00 | 0.00 | |
| User Training Plan | 8,400.00 | 0.00 | 8,400.00 | 0.00 | | 60.00 | 0.00 | 60.00 | 0.00 | |
| Train the Trainer Classes | 13,600.00 | 0.00 | 13,600.00 | 0.00 | | 80.00 | 0.00 | 80.00 | 0.00 | |
| Trainer Certification and User Validation | 12,000.00 | 0.00 | 12,000.00 | 0.00 | | 80.00 | 0.00 | 80.00 | 0.00 | |
| Deployment Phase Gate Complete | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 | 0.00 | |
| Closing Phase | 14,000.00 | 0.00 | 14,000.00 | 0.00 | | 80.00 | 0.00 | 80.00 | 0.00 | |
| Lessons Learned | 14,000.00 | 0.00 | 14,000.00 | 0.00 | | 80.00 | 0.00 | 80.00 | 0.00 | |
| Closing Phase Gate Complete | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 | 0.00 | |

# Key Task and Milestone Status

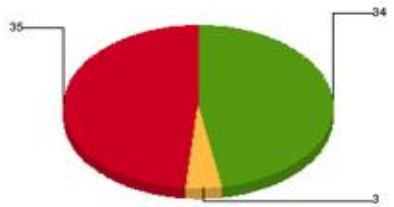
## Key Task and Milestone Status

**Martin, Paul**

Start Date Schedule




Finish Date Schedule




| Project / WBS | Type | Status | % Complete | Baselined? | Start | | | Finish | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | Date | Days Late | Schedule % | Date | Days Late | Schedule % |
| **HR Claims Processing Enhancement** | | | | | | | | | | |
| Change Review Process | Phase | Started | 90 | | 6/3/2013 | 0 | | 6/21/2013 | 18 | |
| Test | Phase | Started | 30 | | 6/24/2013 | 0 | | 7/5/2013 | 4 | |
| Deployment | Phase | Not Started | 0 | | 7/8/2013 | 1 | | 7/25/2013 | 0 | |
| **Mobile Security** | | | | | | | | | | |
| Plan Infrastructure Change | Phase | Not Started | 0 | ✓ | 8/5/2013 | 0 | | 8/16/2013 | 0 | |
| Asset Mapping & Configuration | Phase | Not Started | 0 | ✓ | 8/26/2013 | 0 | | 9/13/2013 | 0 | |
| Deployment | Phase | Not Started | 0 | ✓ | 9/16/2013 | 0 | | 9/20/2013 | 0 | |
| **Online Order Catalog** | | | | | | | | | | |
| Construction Phase Gate Complete | Milestone | Not Started | 0 | ✓ | 7/4/2013 | 5 | | 7/4/2013 | 5 | |
| Deployment and Quality Phase | Phase | Not Started | 0 | ✓ | 7/8/2013 | 3 | | 7/12/2013 | 1 | |
| Deployment Phase Gate Complete | Milestone | Not Started | 0 | ✓ | 7/12/2013 | 1 | | 7/12/2013 | 1 | |
| Closing Phase | Phase | Not Started | 0 | ✓ | 7/17/2013 | 5 | | 7/17/2013 | 5 | |
| Closing Phase Gate Complete | Milestone | Not Started | 0 | ✓ | 7/17/2013 | 5 | | 7/17/2013 | 5 | |
| **Social Networking Security Upgrade** | | | | | | | | | | |
| Initiation Phase | Phase | Not Started | 0 | ✓ | 8/1/2013 | 0 | | 8/1/2013 | 0 | |
| Initiating Process Complete | Milestone | Not Started | 0 | ✓ | 8/1/2013 | 0 | | 8/1/2013 | 0 | |
| Planning Phase | Phase | Not Started | 0 | ✓ | 8/1/2013 | 0 | | 8/20/2013 | 1 | |
| Planning Phase Gate Complete | Milestone | Not Started | 0 | ✓ | 8/20/2013 | 1 | | 8/20/2013 | 1 | |

# Project Task Dependencies

## Project Task Dependencies

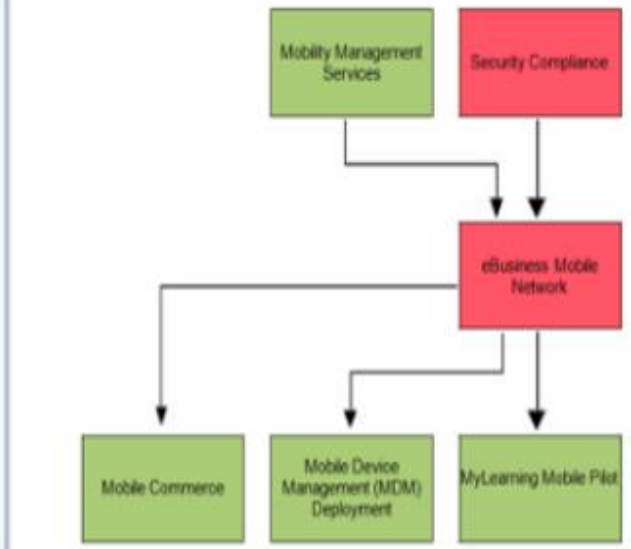
### Project Summary

| | |
|---|---|
| **Project Name** | eBusiness Mobile Network |
| **Project ID** | PR1011 |
| **Project Type** | Major Project |
| **Project Manager** | Paxton, Robyn |
| **Work Status** | Requested |
| **Start** | 11/3/14 |
| **Finish** | 2/4/16 |
| **Planned Cost** | 646,260.00 |

**Objective**

Expand the eBusiness Network to support all types of mobile devices and traffic volume related to increased usage. This supports the new mobile initiative to provide ease of access to key systems for employees as well as customers.

### Project Dependency Diagram




| Dependencies | | | | | | | | eBusiness Mobile Network | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Project Name** | **Project ID** | **Task Name** | **Dependency Schedule** | **Start** | **Finish** | **Type** | **Dependency Type** | **Task Name** | **Start** | **Finish** |
| Mobility Management Services | PR1032 | Risk Response and Mitigation Plan | | 4/15/15 | 4/24/15 | Predecessor | Finish-Start | Identify Infrastructure Requirements | 2/9/15 | 2/16/15 |
| Security Compliance | PR1031 | Construction Phase Gate Complete ✓ | | 3/31/15 | 3/31/15 | Predecessor | Finish-Start | Requirements Definition | 12/12/14 | 1/8/15 |
| Mobile Commerce | PR1041 | Functional and System Testing ✓ | | 7/24/15 | 7/30/15 | Successor | Start-Start | Functional and Technical Design ✓ | 1/9/15 | 2/16/15 |
| Mobile Device Management (MDM) Deployment | PR1030 | Define Resource Plan | | 7/29/15 | 8/7/15 | Successor | Finish-Start | User Interface Development ✓ | 3/10/15 | 4/10/15 |
| MyLearning Mobile Pilot | PR1044 | Database Development ✓ | | 6/29/15 | 7/13/15 | Successor | Finish-Start | Unit and Performance Testing ✓ | 4/13/15 | 7/7/15 |

# Questions?

Task Management

# Thank you for attending

Task Management


**Phone**
+44 (0)7710 012733

**Email**
steve.denny@pemari.com

**Website**
www.pemari.com

Let us know how we can improve!
Don’t forget to fill out the feedback forms!