CA Clarity™ PPM

Resource Management User Guide
v13.0.00

Contact CA Technologies

Contact CA Support

For your convenience, CA Technologies provides one site where you can access the information you need for your Home Office, Small Business, and Enterprise CA Technologies products. At http://ca.com/support, you can access the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- CA Support policies and guidelines
- Other helpful resources appropriate for your product

Providing Feedback About Product Documentation

If you have comments or questions about CA Technologies product documentation, you can send a message to techpubs@ca.com.

If you would like to provide feedback about CA Technologies product documentation, complete our short customer survey, which is available on the CA Support website at http://ca.com/docs.

Contents

Chapter 4: Resource Planning 51

Chapter 5: Capacity Planning Scenarios 67

Chapter 6: Finding Resources   83

Appendix A: Portlets   87

Appendix B: Access Rights   97

Chapter 1: Resource Management Overview

This section contains the following topics:

About Resource Management

Deploying skilled professionals to the right project teams is the key to effective resource management. Resource Management provides a flexible framework in which you can perform and monitor the following resource management activities:

- Create and edit resource profiles that identify various characteristics including primary role, skills, experience, employee type and more.

- View, edit, and track resource project allocations and workloads.

- Compare resource capacity with resource demand.

- Locate resources with specific characteristics, by availability, and more.

The audience for Resource Management is resource managers. A resource manager is anyone who manages the time of an employee or other resource type. A resource manager can be a temporary project lead or a full-time department head. Project managers use Resource Management features, such as creating requisitions and finding resources.

Resource Management Components

You can access the following Resource Management components from the Resource Management menu:

Resources

Use Resources to create and edit resource profiles, and skills. You can also use this component to find specific resources, or to find resources with specific qualifications for specific projects.

Resource Planning

Use Resource Planning to view and change resource workload allocations across all the projects to which resources are assigned, or on individual projects. Use Resource Planning to view and track unfilled role allocations.

Resource Finder

Use Resource Finder to locate resources. The Resource Finder lets you specify resources by name or by other criteria such as skills, employment type, and availability.

To use Resource Management feature, you must have resource access rights.

See the appendix for a list of resource management access rights.

Resource Management Jobs

The Time Slicing job can affect data or the performance of the resource management. When the Time Slicing job fails to run, time-sliced data shown on resource planning pages cannot display properly.

When the existing or edited data fails to display in the expected ways on a page or in a report, contact your administrator. The failure of jobs to run could cause failure in display.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Chapter 2: Managing Resources

This section contains the following topics:

Resources and Roles

Use Resource Planning to create resource and role profiles and associate them with skills. You can assign resources and roles to investments and monitor and edit their allocations.

A *resource* is a person or object, such as equipment that is used to fill a role or perform a task. A role is a generic description of a function or an object, such that the developer role represents any resource whose function is writing code.

Use Resource Planning to create and edit resources and roles and assign them to projects. A role can help define the tasks and scope for a project. Later, you can replace the role with a resource that performs the actual work.

You can create the following types of resources or roles:

Resource or Role Type	Description	Can be Allocated	Has Skills
Labor	Any person or role that works or completes tasks.	Yes	Yes
Equipment	Any type of machinery used to perform a job, such as delivery trucks, printers, and computers.	Yes	No
Material	Any type of material used to perform a job, such as training guides, chemicals, or fuel.	Yes	No
Expense	Any costs associated with a resource or a role, such as the cost of traveling to a customer site.	Yes	No

How to Create Resources and Roles

Create a resource and role by doing the following:

1. Create the resource or role profile (see page 12).

   For a resource, a profile defines basic information including name, email address, primary role, and the number of hours the resource is available to work each business day. For a role, a profile defines the name of the role and the number of hours the role, when replaced by a resource, must be available for work.

2. Define the profile associations (see page 21).

   An association refers to the tasks and skills information either assigned to or associated with a resource or role.

Create a Labor Resource

Once resource profiles are created, you can start assigning work to them. Your CA Clarity PPM administrator must enable new resource profiles to allow them to log in to CA Clarity PPM. Your CA Clarity PPM administrator must do the following:

- Activate their status

- Create a password

See the *Administration Guide* for more information.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.

   The list page appears.

2. Click New.

   The select resource type page appears.

3. Accept the default resource and resource type and click Next.

   The create page appears.

4. Complete the following fields in the General section.

   Last Name

   Defines the last name for the resource.

   Required: Yes

   First Name

   Defines the first name for the resource.

   Required: Yes

Resource ID

Defines the unique identifier for the resource. Resource ID is a display only field.

Required: Yes

Unique: Yes

Email Address

Defines the address to which notifications and other CA Clarity PPM communications are sent.

Note: The address must be accurate and up-to-date.

Primary Role

Indicates the primary role for the resource. Roles can change from investment to investment. A primary role lets other CA Clarity PPM resources see at a glance the primary area of expertise of a resource.

Category

Defines the category that is used to identify the area of expertise for the resource.

Example: "Software Development" or "Product Marketing"

Employment Type

Specifies the employment type for the resource.

Values: Employee or Contractor

Default: Employee

Required: Yes

External

Specifies whether the resource works for an outside company.

Default: Cleared

Date of Hire

Specifies the hire date for the resource.

Date of Termination

Specifies the termination date (if applicable) for the resource.

Availability

Defines the number of hours in a business day that the resource is expected to work. The availability number is automatically multiplied by 5, the number of days in a standard workweek.

Required: Yes

Default: 8

Example: If you enter 7, the resource is assumed able to work 7 hours a day, 5 days a week, for a total of 35 hours per week. If you use the default of 8, the resource is assumed available to work 8 hours a day for a total of 40 hours per week.

Input Type Code

Specifies an Input Type Code for the resource. This code is used for billing purposes.

Track Mode

Indicates the tracking method used to enter time for this resource.

Values:

- Clarity. Staff members enter time against their assigned tasks using timesheets.

- None. Non-labor resources, such as expenses, materials, and equipment track actuals through transaction vouchers, or through a desktop scheduler, such as Open Workbench and Microsoft Project.

- Other. Indicates that actuals are imported from a third-party program.

Default: Clarity

Open for Time Entry

Specifies if the resource can track time spent on task assignments using timesheets. When cleared, the resource cannot log time on any project.

Default: Selected

Include in Datamart

Specifies the resource for inclusion in datamart. When cleared, the resource is not added in datamart.

Default: Cleared

Resource Manager

Identifies the name of the person creating the resource.

Default: The name of the resource logged in to CA Clarity PPM

Booking Manager

Indicates the default booking manager for this labor resource or role.

Active

Specifies whether the resource is active. Activate the resource to allow the resource to record time spent on the project in timesheets.

Default: Selected

5. In the Organizational Breakdown Structures section, define the OBS you want to associate with the resource for security, organizational, or reporting purposes.

See the *CA Clarity Basics User Guide* for more information.

Department

Defines the financial department and entity associated with the resource. The department belongs to the same entity as the location.

Location

Defines the location used to match the investment with debit and credit rules for transaction processing of chargebacks. If system or entity defaults indicate that the source location is taken from the investment, use location to match the investment with rate and cost matrices.

See the *Administration Guide* for more information.

6. Click Save.

Create a Non-Labor Resource

Once resource profiles are created, you can start assigning investments to them. However, your CA Clarity PPM administrator must enable new resource profiles to allow them to log in to CA Clarity PPM. Your CA Clarity PPM administrator must do the following:

- Activate their status

- Create a password

See the *Administration Guide* for more information.

The following procedure explains how to create a non-labor resource (material, equipment, expense). Though some of the fields vary depending on the resource type you select, the overall steps for creating each type of resource are the same.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.

   The list page appears.

2. Click New.

   The select resource type page appears.

3. Complete the following fields:

   Resource or Role

   Specifies whether the resource is a resource or role.

   Values: Resource or Role

   Default: Resource

   Resource Type

   Specifies the type of resource or role you want to create. In lists and in portlets, displays the resource type.

   Values: Labor, Equipment, Material, Expense

   Default: Labor

4. Click Next.

   The create page appears.

5. Complete the following fields in the General section. In the Organizational Breakdown Structure section, specify the OBS you want to associate with the resource for security, organizational, or reporting purposes.

   Name

   Defines the name of the non-labor resource.

Resource ID

Defines the unique identifier for the resource. Resource ID is a display only field.

Required: Yes

Unique: Yes

Email Address

Defines the address to which notifications and other CA Clarity PPM communications are sent.

Note: The address must be accurate and up-to-date.

Primary Role

Indicates the primary role for the resource. Roles can change from investment to investment. A primary role lets other CA Clarity PPM resources see at a glance the primary area of expertise of a resource.

Category

Defines the category that is used to identify the area of expertise for the resource.

Example: "Software Development" or "Product Marketing"

Employment Type

Indicates if the resource is a contractor or a full-time employee.

External

Specifies whether the resource works for an outside company.

Default: Cleared

Date of Hire

Specifies the hire date for the resource.

Date of Termination

Specifies the termination date (if applicable) for the resource.

Availability

Defines the number of hours in a business day that the resource is expected to work. The availability number is automatically multiplied by 5, the number of days in a standard workweek.

Required: Yes

Default: 8

Example: If you enter 7, the resource is assumed able to work 7 hours a day, 5 days a week, for a total of 35 hours per week. If you use the default of 8, the resource is assumed available to work 8 hours a day for a total of 40 hours per week.

Input Type Code

Specifies an Input Type Code for the resource. This code is used for billing purposes.

Track Mode

Indicates the tracking method used to enter time for this resource.

Values:

■ Clarity. Staff members enter time against their assigned tasks using timesheets.

■ None. Non-labor resources, such as expenses, materials, and equipment track actuals through transaction vouchers, or through a desktop scheduler, such as Open Workbench and Microsoft Project.

■ Other. Indicates that actuals are imported from a third-party program.

Default: Clarity

Open for Time Entry

Specifies if the resource can track time spent on task assignments using timesheets. When cleared, the resource cannot log time on any project.

Default: Selected

Include in Datamart

Specifies the resource for inclusion in datamart. When cleared, the resource is not added in datamart.

Default: Cleared

Resource Manager

Identifies the name of the person creating the resource.

Default: The name of the resource logged in to CA Clarity PPM

Booking Manager

Indicates the default booking manager for this labor resource or role.

6. In the Organizational Breakdown Structures section, define the OBS you want to associate with the resource for security, organizational, or reporting purposes.

   See the *CA Clarity Basics User Guide* for more information.

   Department

   Defines the financial department and entity associated with the resource. The department belongs to the same entity as the location.

   Location

   Defines the location used to match the investment with debit and credit rules for transaction processing of chargebacks. If system or entity defaults indicate that the source location is taken from the investment, use location to match the investment with rate and cost matrices.

   See the *Administration Guide* for more information.

7. Click Save.

Create a Role

You can create role profiles.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.

   The list page appears.

2. Click New.

   The select resource type page appears.

3. Select Role in the Resource or Role section.

4. For Resource Type, select the type of resource you want to create. Labor is the default resource type.

5. Click Next.

   The create page appears.

6. In the General sections, complete the following fields:

   Name

   Defines the name of the role.

   Role ID

   Defines a unique identifier for the role.

Parent Role

Specifies the parent role for this role.

Example: The Application Developer role is a parent to the Web Developer role.

Category

Defines the category used to identify its area of work for the role.

Example: Software Development or Product Marketing.

Availability

Defines the number of hours in a business day that the role (or the resource replacing the role) is available for work or is expected to work. The availability number is automatically multiplied by 5, which is the number of days in a standard workweek.

Default: 8

Example: If you enter 7, the resource is assumed able to work 7 hours a day, 5 days a week, for a total of 35 hours per week. If you use the default of 8, the resource is assumed available to work 8 hours a day for a total of 40 hours per week.

Booking Manager

Indicates the default booking manager for this labor resource or role.

7. In the Organizational Breakdown Structure section, specify the OBS you want to associate with the role for security, organizational, or reporting purposes.

Department

Defines the department used during transaction processing of chargebacks to charge or credit departments for costs. The department can also be used to match the investment with rate and cost matrices. If a department is selected on the general properties page, this field is auto-populated. Required for chargebacks.

Location

Defines the location used to match the investment with debit and credit rules for transaction processing of chargebacks. If system or entity defaults indicate that the source location is taken from the investment, use location to match the investment with rate and cost matrices.

See the *Administration Guide* for more information.

8. Click Save.

Manage General Resource Properties

Associations are defined from main resource and role properties pages.

Use the following to define resource and role associations:

Properties

Profile information about the resource or role. You can edit these fields, and define additional resource, group, and OBS access to the resource or role.

Skills

Use this page to view a list of skills associated with a labor resource, and to add or edit skill information. Associating skills with labor resources can be helpful for those trying to match labor resources to roles and projects.

Allocations

This page lists all the projects to which the resource or role has been added. Use this page to add and remove projects to and from the workload for the resource, and to edit the amount of time the resource or role has been allocated to a project.

Calendar

This page displays the calendar by month for the resource. Use this page to view scheduling exceptions, such as special non-workdays or shift information, if you have identified such information. You can change calendar information for a resource to which you have the *Resource - Edit* access right.

Financially Enable Resources

Financially enable any labor resource involved with financial transactions for posting transactions and for chargebacks.

Follow these steps:

1. With the resource profile open, click Properties, and go to Financial.

    The properties page appears.

2. Complete the following fields:

    Financially Active

    Indicates whether the resource is financially active. Select the check box to enable the resource to record financial transactions against an investment.

    Financial Location

    Specifies the financial location associated with the resource.

    Financial Department

    Specifies the financial department associated with the resource.

Transaction Class

Identifies the transaction class for the resource. Used with financial transactions to apply cost.

Resource Class

Identifies the resource class for the resource. Used with financial processing.

Vendor

Defines the company or resource providing the product or service.

Target Billing Rate

Defines the target billing rate for the resource, if applicable.

Target Billing Rate Currency

Defines the currency for the target billing rate.

Target % Billing

Defines the percentage of the targeted billing rate that is billable.

Expense Reimbursement Currency

Defines the currency in which the expenses must be reimbursed for this resource.

Employee Country Code

Defines the country code for the resource, if applicable.

3. Click Save.

Add Contact Information

Provide the telephone and address information for the resource. Contact information is available to anyone who has access to the resource.

Follow these steps:

1. With the resource open, click Properties and go to Contact Information.

    The contact information for the resource page appears.

2. Complete the following fields:

    Job Title

    Specifies the job title for the resource.

    Street 1, 2, 3

    Defines business address for the resource including suite, building, P.O. Box, or apartment numbers.

City, State, Postal Code

Defines the business city, state, and postal code for the resource.

Country

Identifies the country location for the resource.

Home, Work, Mobile Phone Numbers

Defines home, work, and mobile numbers for the resource.

Fax

Defines a business fax number for the resource.

Pager

Defines a pager number for the resource.

URL

Defines a website address for the resource.

3. Click Save.

Skills for Labor Resources

You can use skills to describe the talent a resource or role is required to complete tasks, or to display the talent already processed. The level of interest and proficiency in each skill for a resource or role can also be indicated.

Associate Skills with Labor Resources

You can associate a skill with any labor resources to which you have access. Assign proficiency and interest levels as desired. You can only associate skills to labor resources.

Follow these steps:

1. With the resource open, click Skills.

The skills page appears.

2. Click Add.

The select skills page appears.

3. Select the skill, and click Add.

The selected skill is added to the associated skills list for the resource.

View a List of Skills Associated to Labor Resource

The skills page displays a list of all the skills that are associated with the labor resource. The skills are listed in ascending order by skill name.

Use this page to filter the skill association list by skill name, parent skill, skill ID, and description.

Follow this step:

1. Open the resource and click Skills.

   The skills page appears.

You can remove any skill associated with the labor resource in the Skills page. To delete a skill, select the skill you want to remove and click Remove.

Assign Skill Proficiency and Interest Levels to a Labor Resource

The proficiency level for a labor resource lets you rate the skill of the resource. You can change skill proficiency and interest level settings at any time.

The following are the basic proficiency levels:

- Beginner at the bottom of the scale

- Expert at the top

- Advanced in the middle.

You can further refine the rating by identifying sublevels within the level. For example, a resource with a proficiency level of 3 - Beginner has more expertise than one with a level of 1 - Beginner.

Interest rating works the same way: CA Clarity PPM provides basic interest levels, with Low at the bottom, High at the top, and Medium in the middle. At each level, you can select a sublevel. For example, a resource with an interest level of 7 - Medium has a greater interest in performing a skill compared to one with an interest level of 4 - Medium.

Follow these steps:

1. With the resource open, click Skills.

   The skills page appears.

2. Select a proficiency level, interest, and weighting value for each skill.

3. Click Save.

Resource and Role Allocations

Use the resource/role allocations page to view and edit information about the investments to which a resource or role is assigned. You can change booking status, and edit allocations by date or percentage. In addition, you can add and remove investments from both pages.

When you change allocations from resource management pages, you only change investment-level information, specifically, the resource or role allocations to the investment. These dates can differ from the ones to which the resource or role has been assigned to project tasks.

Best Practice: Do not change the investment allocations for a resource or role from resource management pages. Only, the manager of the investment to which the resource or role has been assigned can modify. If you are the manager of the investment, change allocations from the team staff page of the investment. As a resource manager, if you edit allocations for a resource from the resource planning pages, communicate the changes to the manager of the investment.

The changes you make from the resource/ role allocation pages appear on the team staff page for the investment. It is a good idea to let the manager know directly. The manager can then adjust task assignments and the schedule for the investment, if necessary.

See the *Project Management User Guide* for more information.

Edit a Resource or Role Allocation

You can create or edit allocation segments to edit a resource or role allocations. You can make the following allocation changes:

- Change the start and finish dates for the investment allocation.

- Change the percentage of time the resource or role is allocated to the investment.

    - Resources and roles are booked to each project for 100 percent of their time. Use the % Allocations field to reduce the amount of time a resource spends on each project.

- Shift investment allocation periods.

Follow these steps:

1. Open the resource or role allocation.

    The allocations page appears.

2. Edit the fields.

3. Click Save.

Shift a Resource Allocation

Use the Shift Allocation option to shift or scale all or a portion of the resource allocations in one project. This option is useful when you want to extend project allocations beyond the allowable time-scaled view, which extends only for six months by default. You can move resource allocations both back and forward in time.

For example, suppose that an allocation period starts on May 1, continues at its default rate of 100 percent through the end of May, and then goes through June at the reduced allocation of 50 percent. If you shift the allocation to start on June 1, it will go from June 1 through July 2 (for 31 calendar days) at 100 percent, and then through August 2 at 50 percent. You can also shift allocations for time spans that contain no segments.

You cannot change the project schedule dates. Use these dates as guidelines on how far you can shift work back or forward. You cannot shift work previous to the start date, and you cannot shift work past the finish date.

Follow these steps:

1. With the resource open, click Allocations.

   The allocations page appears.

2. Select the investment whose allocations you want to shift, and click Shift Allocation.

   The shift allocation page appears.

3. Change the following fields as applicable. Data shifts according to the information you enter in these fields.

   Start and Finish Dates

   Defines the start and finish dates of the project unless they have been changed. These dates create the period that can shift.

   Shift to Date

   Defines the beginning date for the data being shifted.

   Note: If you leave the field blank, no shifts occur.

   Shift Cut-off Date

   Defines the last date for shifting allocations. Allocations cannot shift beyond the last date.

   Scale Allocation % By

   Defines the percentage change in the allocation required for the shift.

   Note: If you leave the field empty, no scaling occurs.

   Required: No

4. Click Save.

Change Default Allocation

You can create planned and hard allocation curves for the time a resource works on an investment. These curves indicate any deviations from the Default % Allocation field. While the Planned Allocation curve represents the default or total allocation amount requested by the investment manager, the Hard Allocation curve represents the allocation amount that the resource manager committed.

When editing the default allocation for a resource, gaps can appear between allocation segments. The gaps are automatically filled by creating new allocation segments.

See the *Project Management User Guide* for more information.

Follow these steps:

1. With the resource open, click Allocations.

   The allocations page appears.

2. Click Properties.

   The properties page appears.

3. In the General section, complete the following field:

   Default % Allocation

   Defines the percentage of time you want to allocate the resource to this project (you can enter 0 percent). This amount is reflected in the Allocation and Allocation % columns on the project team staff page.

   Default: 100 percent

   Required: No

4. In the Planned Allocation and Hard Allocation sections, create one row for each deviation from the default allocation.

   Example:

   To use the short example preceding these steps, create two rows:

   ■ First row. To cover the period where the resource actually works at 50 percent (compared to the 100 percent default or planned allocation); and

   ■ Second row. For the period where the resource actually works at 0 percent (compared to the 100 percent default or planned allocation).

5. To create a planned or hard allocation curve, complete the following fields:

   Start

   Defines the start date for the curve.

   Finish

   Defines the finish date for the curve.

% Allocation

Defines the expected percentage of time for the resources to work (as tentative or committed) on the investment. You can enter zero as the allocation percentage.

6. Click Save.

By Example: Create Two Allocation Curves

You have a resource with default allocation set at 100 percent. You booked this resource to work on your project from 8/10/12 through 11/10/12. But the resource is also scheduled to work on another project 50 percent of the time through 9/1. In addition, the resource plans to be on vacation from 9/15 through 9/22. In this case, you create two allocation curves for the resource: one that indicates a deviation to 50 percent from 8/01/12 through 9/01/12, and another that indicates a deviation to 0 percent from 9/15/12 to 9/22/12.

Edit Investment Allocations

The allocations detail page displays resource or role allocations by investment and week in a histogram format. Use this page to edit weekly allocations for a resource by investment.

By default, if an investment is locked, you cannot edit allocations for existing team staff members. The project manager can change the *Allow Edit of Allocations when Investment is Locked* default project management setting to allow you to make changes to the team while the project is locked.

See the *Project Management User Guide* for more information.

Investments display by row and allocations display by week in columns. In the Aggregation section at the bottom of the page, the red bar indicates which months in which the role is overbooked. The yellow bar indicates that no over allocations appear in that period.

Follow these steps:

1. With the resource open, click Allocations, Detail.

   The allocations detail page appears.

2. Click in the field containing the data and edit the data.

3. Change the weekly allocations, and click Save.

Add Investments to Resource Workloads

By default, the resources are allocated to work on the new project 100 percent of the time for the duration of the project. Sometimes, the default allocation overbooks the resource. When overbooked, reallocate the time for the resource or replace the resource with another resource.

If a project is locked and in tentative mode, you cannot edit allocations for existing team members.

You can add investments to the workload for a resource from both of the resource or role allocations pages.

Note: Only resources identified as staff members can perform a task for a project and record time spent on tasks. Project participants can use the collaboration tools of a project but are not always identified as staff members.

See the *Project Management User Guide* for more information.

Follow these steps:

1. With the resource open, click Allocations.

    The allocations page appears.

2. Click Add.

    The investments page appears.

3. Select the investment for the resource and click Add.

    The investment is added to the workload for the resource.

Remove Investments from Resource Workloads

You can use the resource/role allocations page to remove projects and investments from the workload of a resource at any time. If a project is locked, you cannot remove that project from the workload of the resource.

When you staff a resource as a project participant, go to the team participants page to remove the resource from participant status.

See the *Project Management User Guide* for more information.

Follow these steps:

1. With the resource open, click Allocations.

    The allocations page appears.

2. Select the investment you want to remove, and click Remove.

    The confirmation page appears.

3. Click Yes to remove the investment from the list of investments for the resource.

Replace Resources on Investments

Replacing a resource on a project generates a list of resources sharing the same role and is available during the time for the investment. Use the find resources page to replace a resource or role. You can access this page from the allocations summary and detail page.

If a project is locked, you cannot replace existing team members resulting in deleting a team member and transferring assignments. The Replace button appears disabled in this case. Additionally, you can be allowed to replace a resource role only (without replacing task assignment) based on the role replacement settings. For more information about this setting, contact your administrator.

The Availability field identifies the project period and the number of hours the resource you are replacing was allocated to the project. Both the dates and the hours allocated are transferred to the new replacement.

The Availability Match column displays a weighted average that factors in the work period and the availability of each resource. If you do not add any skill specifications to your search criteria, the Total Match column duplicates the Availability Match number. The Skill Match column remains blank. Searching by skills and availability criteria, displays an average of the two in the Total Match column.

The following message appears at the top of the page:

Match scores can be inaccurate if availability dates do not fall into the following range: ddmmyy - ddmmyy

The message indicates a discrepancy between the date range in the message and the dates in the Availability field. That is, the Availability Match score can be inaccurate. For example, say, the dates in the Availability field are 9/1/12 - 2/7/13 and the date range in the message is 9/7/12 - 9/7/13. CA Clarity PPM cannot find a one-to-one comparison for any resource, which lowers the overall availability match scores.

See the *Project Management User Guide* for more information.

Staff Member Replacements Guidelines

Consider the following before making a staff member replacement:

- Replacing a resource does not transfer the actuals, pending actuals, and baseline of the original to the new staff member. Only the remaining ETC is transferred to the new staff member.

- The original staff member must complete any outstanding time entries so that the actual data is posted before the replacement occurs.

- The project role of the original staff member is transferred to the new staff member (unless you are replacing a role with a different role).

See the *Project Management User Guide* for more information.

Follow these steps:

1. With the resource open, click Allocations.

   The allocations page appears.

2. Click the Resource Finder icon next to the investment to replace the resource.

   The find resources page appears.

3. Enter filter values to narrow the resource list, or click Show All to view all resources.

4. Select the check box next to one or more resources to replace the previous resource, and click Replace.

   The confirmation page appears.

5. Confirm the selection by clicking Yes.

   The allocations page appears. As a result of replacing the resource, the investment no longer appears in the list of investments for the resource.

Book Overallocated Resources

If the available hours for a resource are less than the total number of hours, the remaining availability (not the booking) confirmation page appears.

If you add resources to the project or investment, the remaining availability confirmation page indicates overbooking of the resource. If you book at 100 percent (default) availability of the resource, the 100 percent Resource Allocation column lists the number of hours utilized. The Remaining Availability column indicates the actual number of work hours available for the resource to work on the project. When this page appears, you can do the following:

- Overallocate. Click Overallocate to over-allocate the resource.

- Remaining Only. Click Remaining Only to book the resource for the amount listed in the Remaining Availability column.

Calendar Associations

The edit resource calendar page displays the resource availability for various assignments.

You can use the calendar to view or add working days, non-working days, and shifts to the calendar for the resource.

To access the calendar for a resource, open the resource or role whose calendar you want to view, and then select Calendar.

See the *Administration Guide* for more information.

Edit Resource and Role Properties and Associations

You can edit any of the fields available on the property and association pages for the resource or role. While you cannot delete a resource or role profile, you can deactivate their profile.

Edit Resource and Role Properties

Follow these steps:

1. Open the resource.

2. Change any of the fields that display on the page, or the other resource pages accessible from the page.

3. Click Save.

Deactivate a Resource or Role Profile

Follow these steps:

Deactivate a resource or role profile when the resource or role is no longer needed. You cannot assign deactivated profiles to tasks. But the profiles continue to display in the resource list unless you filter them out.

1. Open the resource or role.

2. Clear the Active check box, and click Save.

Chapter 3: Requisitions

Use resource requisitioning to respond to requisitions, exchange messages with the project manager, and manage requisition-related processes. CA Clarity PPM resource requisitioning allows you to create simple or detailed requisitions that request resources for multiple time periods.

This section contains the following topics:

Resource Requisition Overview

A requisition is a request to staff a specific project with labor resources. The chief benefit of requisitions is planning. If you bypass a requisition and assign a resource directly to a project, could jeopardize your own project. This is because you are assigning without knowing about the other projects the resource can be working on. Hence, you can overburden the resource or assign the wrong resource. Requisition recipients tend to be resource managers who are knowledgeable about the workloads and skills of their resources. Thus, when you submit a requisition, the resource managers assign the most appropriate resources to the projects.

You can use resource requisitioning to do the following:

- Create tailored resource requisitions that suit the needs of specific projects

- Perform an on-the-spot search for resources that fit requisition requirements

- Discuss a requisition with its recipients

Requisitions are project-specific, which means that you cannot create a requisition that staffs multiple projects at the same time. Each requisition contains a request for only one staffing requirement and can serve only one project.

See the *Project Management User Guide* for more information.

Set a Default Booking Manager for Resources

As a manager in charge of resources, you can define a default booking manager for each resource and role in the system. Hence, requisitions are routed automatically to the appropriate resource manager without any intervention from the project manager.

Defining the booking manager is optional. If defined, the Booking Manager field of a requisition defaults to this resource manager and appears on the resource properties page. If you do not define this field, the project manager can define it at the requisition level or leave it blank. If the field is left blank, the access rights of the available resource manager decide the allocation to this requisition.

For roles, a mapping between roles and an OBS structure can be used to define the default booking manager.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.

   The list page appears.

2. Click a resource name to open the resource properties.

   The general page appears.

3. In the General section, specify the booking manager for the resource.

4. Click Save.

Requisition Routing and Notification

When a requisition is created, it is routed to the appropriate booking manager based on the following:

- If a default booking manager is defined for the resource or role. If no default booking manager is defined, then staffing requirement OBS is combined with staffing requirement role to determine the booking manager.

- If a booking manager mapping does not exist for a specific role and OBS, then look up the role chain. If not found, look up the OBS chain until found. Role chain refers to roles that have parent roles. For example, an Automation Engineer can have QA Engineer as a parent role.

- If no role can be associated with an OBS all the way up the role and OBS chains, the requisition does not get routed.

Both the project manager (requisition creator) and booking manager (resource manager) are notified of status changes in requisitions. If no booking manager is selected, no notification is sent. But everyone with appropriate access rights sees the requisition in their list. For example, by filtering on unassigned requisitions. The Booking Manager field can be changed at any time to reflect another resource manager. The facility to change allows resource managers to route the requisitions again.

The Requested By field value on the Requisition Properties page defaults to the requisition creator. If you are different from the current Requested By user, change the Requested By field value to equal yourself. If your company has a routing chain that goes through multiple people, the facility to change is useful.

Only users in the Requested By and Booking Manager fields get notified about open requisitions. Requested and booked resources are not notified. Resource notification happens when the resource is added to the project as a staff participant. The notification can be set to occur automatically when the resource is hard-booked. For details, contact your administrator.

Types of Requisition Status

The following describes the different requisition status types and describes a typical use for that status:

New

All requisitions begin as "New." They retain their "New" status until the owner submits the requisition or manually changes the status. When you are ready for a booking manager to fill the request, change the status to "Open."

See the *Project Management User Guide* for more information.

Open

This status indicates that the requisition is active and requires to be filled. The requestor who creates the requisition is the one who changes the status to "Open." The booking manager is notified. From "Open," the status can be set to "New," "Proposed," or "Closed."

Note: The status "Proposed" is available if you have the *Project – Attach Requisition Entry Resources* access right. Also, the Requisition Approval Required setting is required to be selected for the project.

Proposed

The booking manager proposes bookings to fulfill the requisition. The requestor is notified. The requestor reviews the proposed resources. If the requestor rejects the resources that the booking manager has identified, the requisition status changes to "Open."

Booked

This status indicates that a project manager or resource manager has accepted (booked) the resource on the requisition. The requisition status automatically changes to "Booked" and the resource is notified. "Booked" status is available:

- ■ If you have the *Project – Edit* access right and requisition, approval is required.

- ■ If you have the *Project – Attach Requisition Resources* access right and requisition, approval is not required.

Closed

This status indicates that no more work is required to happen on a requisition. Only the requestor can close a requisition. If the booking manager declines an open requisition, the requisition status automatically changes to Closed.

Note: The Status field of a requisition is located on the Requisition Properties page. The requisition owner (also named a requestor) is the only person who can change its initial status from "New" to something else (typically "Open"). Recipients can change the status from "Open" to "Proposed," "Booked," or "Closed."

The following table shows the parties notified when the requisition status changes:

Requisition Status Changes	Requested By	Booking Manager
Created		
From New to Open		Notified
From Open to New		Notified
From Open to Propose	Notified	
From Proposed to Booked		Notified
From Open to Book (if requisition, approval is not required)	Notified	
Booking Manager changes	Notified	New and old booking managers are notified.
Requested By changes		
Closed		
Deleted		

You can determine your requisition notification format (that is, the message layout and delivery method) from your Account Settings: Notifications page.

See the *CA Clarity Basics User Guide* for more information.

You can set up an automated process to identify the different stages in the lifecycle of a requisition and automatically issue notifications at every stage.

Access Resource Requisitions

As resource manager, you receive notification for each requisition assigned to you. You can access these open requisitions in the following ways:

■ The email notification that contains a link that you can follow directly to the Requisition Properties page.

■ The notification on your home page that contains a link that you can follow directly to the Requisition Properties page.

■ The Project Requisitions page – the project page that shows its requisitions.

■ The Resource Requisitions page – the resource management page that shows requisitions across projects. From the Resource Management main menu, click Resource Requisitions to access this page.

The Resource Requisitions page lists all assigned requisitions and unassigned requisitions that you have rights to view. From this page, you can propose and book requisitions.

Filter the Requisitions List

Use the Requisition Filter section at the top of the Resource Requisitions page to locate one or more requisitions using various search criteria. You can search by requisition name, ID, associated project, status, or priority.

Follow these steps:

1. Enter or select the search criteria in the Filter portion of the page.

2. Click Filter.

   The search results display in the bottom portion of the page.

See the *CA Clarity Basics User Guide* for more information.

Manage Resource Requisitions

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.

   The list page appears.

2. Click the requisition link to open the requisition and edit.

   The properties page appears. The page contains the following tabs:

Properties

This page provides the details that the requisition requestor enters.

Resources

Use this page to find and add resources to your requisitions.

Discussions

Use this page to initiate and participate in the requisition discussions.

Processes

Use this page to create, run, and track requisition processes.

Audit Trail

Use this page to track changes on the requisition object (if requisition fields are enabled for auditing). For details, contact your administrator.

3. Depending on your access rights, you can change any of the fields available on any of the tabs.

4. When you are finished, click Save and Return to save your changes and return to the Resource Requisitions page.

Fulfill Requested Staffing Needs

From the Resource Requisitions page, you can access and fulfill all requisitions assigned to you. You can respond to the requested staffing needs as follows:

- Open a requisition to access more information about the staffing need and work on it individually.

- Select multiple requisitions from the list and click Propose to recommend resources to the project manager.

Named Resource Requisitions

Requests for named resources include a proposed resource making it easier for you to respond. To address requests for named resources, open a requisition and address it individually. Or, select multiple requisitions and propose them back to the project manager.

Use the Requisition Resources page to address named resource requisitions. This page displays a histogram presenting more information about the resource. You see exactly how much the project manager requests on a weekly basis. The yellow part of the histogram represents the amount the resource is needed on this particular project. The green part represents amounts needed on other projects. The red shows where the resource is over-allocated.

Open and Address a Single Requisition

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.

   The list page appears.

2. Click the Person with List icon next to a requisition to access that requisition.

   The resources page appears.

3. To propose the resource back to the project manager for the requested time and allocation amount, click Propose.

   The Resource Requisitions page appears and refreshes the status of the requisition to "Proposed".

Reduce Resource Allocation

After you open a requisition, if you decide that a resource is over-allocated, you can reduce the allocation.

You can also click the Properties icon to the left of the resource name, edit existing allocation segments and optionally add new allocation segments. When you are done, click Save and Return.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.

   The Resource Requisitions page appears.

2. Edit the fields on the page.

3. Reduce the allocation of the resource to avoid overallocation.

4. Save the new allocation amount.

   The yellow now represents the new booking amount to the project and the green represents the bookings to other projects. No red displays to indicate over-allocation.

Propose a Resource Allocation

After opening a requisition and editing the allocation amount for the named resource, you can propose the allocation back to the project manager. Click Propose. The Resource Requisitions page appears and refreshes the status of the requisition to "Proposed".

If...	Then...
The Requisition Approval Required option for the project is turned off (no project manager approval required).	The Book button displays on the page instead of the Propose button. Click Book to hard-book the resource onto the project automatically without the project manager approval.
The Requisition Approval Required option is turned off, but you do not have the Project – Edit access right.	The Propose button displays on the page instead of the Book button. Click Propose to submit the booking for approval, rather than directly booking to the project. Later, when your project manager views the Project Team: Requisitions page, the Book and Reject buttons displays on the page.

If you propose the same resource with the same allocation to the project manager, the proposal gets approved automatically. The project manager does not approve the proposal. Automatic acceptance sends a notification to the project manager.

Propose Multiple Named Requests

Follow these steps:

■ Select the list of named resources and click Propose to propose the allocations to the project manager.

■ Edit the allocation amounts for the requested named resources directly in the grid. Then, select the named resources and click Propose.

Unbook a Requisition

On the Resource Requisitions page, if a requisition contains a request to unbook a specific resource, a checkmark appears in the Unbook column.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.

   The list page appears.

2. Click the link for that requisition.

   The properties page appears.

3. Click Unbook.

   On the Resource Requisitions page, note how the hard-booked allocation amount changes in the Average Rate column. If a resource is unbooked fully, the value displays as 0.00 percent.

   Note: A requisition to unbook and replace a resource, selects both the Unbook and Replace check boxes on the Requisition Properties page. Also, the Resources menu displays. Click Resources to set appropriate filtering criteria. Then select and add a new resource to match the availability of the replaced resource. If you have the required access rights, the Replace button displays on the page. Click Replace to replace the unbooked resource with the new resource. If not, the project manager can review the proposed replacement and then book that resource.

   See the *Project Management User Guide* for more information.

Address Role Requests Using Requisitions

On receipt of a role requisition, find and propose at least one resource that fits the role described in the staffing requirement. If you propose multiple resources, allocate the resources appropriately so the requisition amount gets divided among the multiple resources. For example, if the PM asks for one resource for a week, you can propose two resources as follows: one from Monday to Wednesday; and the other from Thursday to Friday.

Find Resources

To find resources that match the staffing needs, open the requisition or click the Person with List icon next to the requisition. The information that displays on the Find Resources page is based on the requirements specified in the staffing request. You can modify the search criteria to find more eligible resources.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.

   The list page appears.

2. Click the name of the resource requisition.

   The properties page appears.

3. Click Resources. Or, click the Person with List icon next to the requisition to access the option directly from the Resource Requisitions page.

4. Click Add.

   The find page appears.

5. Optionally, specify additional search criteria and click Filter. Search results appear at the bottom of the page.

6. Optionally, modify the filtering criteria, and search for additional candidates.

7. Select a resource and click Add to place them on the list of proposed resources.

Propose a Single Resource

If a requisition has a single resource, the resource gets selected. The resource is the proposed candidate in the shortlist.

Follow these steps:

1. Select the desired candidate and click Add.

   The Requisition Resources page appears with the Resources page active.

2. Click Propose.

   The Resource Requisitions page appears and refreshes the status of the requisition to "Proposed".

Propose Multiple Resources

If multiple resources are added to the requisition, figure out how much to allocate each resource.

Follow these steps:

1. Drill into each resource to edit the allocation amount.

   The Resource Requisitions page appears.

2. On the Resources page, click Propose.

   The Resource Requisitions page appears and refreshes the status of the requisition to "Proposed".

Modify and Resubmit Proposals

As resource manager, you can modify a proposal and resubmit. Edit only when you receive a notification that the project manager has rejected the resources on a requisition.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.

   The list page appears.

2. Click the requisition link.

   The properties page appears.

3. Click Discussions to see the reason behind the rejection.

4. Select and propose the resource that best matches the request. Delete the other resources.

   The Resource Requisitions page appears and refreshes the status of the requisition to "Proposed".

Decline an Open Resource Requisition

You can decline a requisition for several reasons: Differ with the selection or unavailability of the resource to fill the requisition with. If you decline a requisition, you can post a note on the Discussions page explaining the reason for declining a requisition.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.

   The list page appears.

2. Click the link for that requisition.

   The properties page appears.

3. Set the status to "Closed", and click Save and Return.

   The Resource Requisitions page appears and shows the requisition as closed.

Requisition Discussions

Use the requisition discussions from within a requisition to exchange messages and other information with recipients. Only requisition recipients and others with access to the requisition can participate in discussions that are launched from within a requisition.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.

   The list page appears.

2. Open the requisition to create or participate in a discussion.

   The properties page appears.

3. Click Discussions.

Start and Reply to Discussions

If you can access the requisition, start new discussions and reply to existing messages. To create new messages of any kind either to start a new discussion or reply to an existing message, use the Discussion Message: Properties page.

Follow these steps:

1. Open the requisition for which you want to create or participate in a discussion.

    The properties page appears.

2. Click Discussions.

    The messages page appears.

3. Do one of the following:

    ■ To start a discussion, click New.

    ■ To reply to an existing message, click the subject line of the message.

    Both actions take you to the Discussion Message: Properties page, to create your message.

4. Complete the following fields:

    Subject

    Defines the subject of the message.

    Message Text

    Defines the text of the message.

    Attachments

    Click the Browse icon to attach a document.

    Notify Participants

    Specifies if you want the discussion recipients to receive an email notification when a new message arrives for their review.

    Default: Selected

    You can specify your notification settings, such as email, from your Account Settings: Notifications page.

    See the *CA Clarity Basics User Guide* for more information.

5. Click Save and Return to send the message.

    After you submit the message, you will see it listed in the Messages section of the Requisition Discussion: Messages page.

View the Discussion Thread

A discussion thread begins with the first reply under the original message. Subsequent messages display in descending order. Use the Requisition Discussion: Messages Replies page to view the discussion thread, view messages, or reply to a message.

Once you have expanded the discussion thread, click New to reply, thus further expanding the thread. Click Discussion to collapse all open threads. Click New to create a discussion about the requisition.

Follow these steps:

1. On the Requisition Discussions: Message page, click in the subject line of the discussion for viewing.

    The message page appears.

2. To expand the message and read its contents, do one of the following:

    ■ Click Expand.

    ■ Click the Message icon.

    The expanded message appears.

Manage Automated Requisition Processes

In the out-of-the-box notification system for requisitions, notification generation depends on manually changing the Status setting of the requisition. If the setting is not changed, a notification cannot be sent. If the status of new requisitions is not changed to "Open," the recipients cannot know about the new requisition to fill.

You can avoid notification uncertainty by setting up an automated notification process that identifies different stages in a requisition lifecycle. An automated process can issue a notification whenever a new stage is reached. Use the Requisition: Processes page to issue a notification.

When you create a process from within a requisition, it is available only for that requisition. When your administrator creates a global requisition process in the Administration Tool, the process is available for use by all requisitions. Global access rights are required to create a global process.

The Requisition: Processes page contains two links:

■   Available. The default Requisition: Processes page. This page lists any processes that have already been created either for this requisition or for global use by any requisition. If a number of processes are available, you can use the filter section of the page to locate ones with certain parameters.

■   Initiated. The Initiated page lists processes already started. Use this page to track the progress of processes that are scheduled to run or running.

Follow these steps:

1.   Open Home, and from Resource Management, click Resource Requisitions.

     The list page appears.

2.   Click the requisition to create, run, or view a requisition process.

     The properties page appears.

3.   Click Processes.

     The initiated process log appears.

Create Processes for Resource Requisitions

Create an automated notification process to identify the different stages in a requisition lifecycle and avoid the uncertainty of manual notifications. An automated process issues a notification on reaching a new stage.

The new process appears in the list of available requisition processes. If the process is manual, to initiate the process, select the process and then click Start. The object for the process is required to be set for requisitions.

See the *Administration Guide* for more information.

Follow these steps:

1. Open the requisition.

   The properties page appears.

2. Click Processes.

   The initiated process log appears.

3. Click Available from the toolbar.

4. Click New.

   The properties page appears.

Track the Progress of Processes

Use the *Requisition: Processes* page to track the progress of already started processes. To access this page, open a requisition and click Processes.

While the process is in progress, the status displays as "Running" in the Status field on the Requisition: Processes Initiated page. Click Return to stop the process instance.

See the *Administration Guide* for more information.

Delete Processes

You can delete a process from both the Requisition: Processes Available and Requisition: Processes Initiated pages.

Follow these steps:

1. Select the check box next to the process.

2. Click Delete.

   The confirmation page appears.

3. Click Yes to confirm the deletion.

   The deletion opens the updated processes page.

View Audit Fields for Requisitions

The Requisition Audit Trail page allows you to see when certain issue fields were changed, and by whom. In this way, you can track changes by resource and date.

Your CA Clarity PPM administrator selects the requisition fields that are available to you on the page using Studio.

Follow these steps:

1. Open the requisition whose audit trail to review.

   The properties page appears.

2. Click Audit.

   The audit trail page appears.

3. Filter the list.

   The audit fields for the requisition display.

Chapter 4: Resource Planning

This section contains the following topics:

Overview

Use Resource Planning to view and edit. Resource Planning also helps to compare resource allocation and availability across all investments and roles, or at the individual investment level and roles.

Resource planning provides a flexible, scalable framework in which to manage and compare resource and role allocations with resource and role availability. Allocation refers to time booked to any investment capable of staffing, and availability to time available for booking.

Use resource planning to view and edit resource and role allocations in the following ways:

- By investment by week

- By investment start and finish dates

- For a single investment or across multiple investments

- In a graphic histogram format that contrasts availability and allocation

- In a table format that is allocation information by investment, resource, or role

When you change allocations from resource management pages, you only change investment-level information, specifically, the allocations of a resource or role to the investment. These dates can differ from the ones to which the resource or role has been assigned to project tasks, and investments.

Best Practice: Only the manager of the investment can change the investment allocations for the assigned resource or role from resource management pages. Recommended that the investment manager change allocations from within the investment, from the team staff page of the investment. A resource manager editing allocations for a resource from the resource planning pages, requires to communicate the changes to the investment manager.

The changes you make on the resource planning pages appear on the team staff page for the investment. You can let the manager know about the change directly. The manager can then adjust task assignments and the schedule for the investment, if necessary.

Resource Planning Components

The resource planning pages consist of the following pages. Most of the portlets on the pages display data in a histogram format. A histogram is a chart that indicates different conditions in different color.

Workloads

The default page that displays when you select Resource Planning from the Resource Management menu. The page displays the combined allocations of each assigned resource for all the investments.

Allocations

The page provides several options to view and edit resource and role allocations on individual investments. The page displays the intersection between resource and investment at the team level.

Capacity

The page displays filled and unfilled role information for individual investments.

Investments

The page lists and aggregates demand for all investments by OBS. Assuming that you have organized your data by OBS, you can drill down and view allocation data at different levels within the selected OBS unit.

Resource Availability

Availability refers to time available for work. Initially, the daily availability for a resource is based on the number entered in the Availability field in their profile. By default, that number is 8. This number is multiplied by 5, which is the number of business days in a standard workweek. For example, if the value is 8 in the Availability field. The resource can work 8 hours a day, 5 days a week, for a total of 40 hours per week.

Whenever you book a resource to an investment as a staff member, allocated time is tracked against available time. You can over-allocate the resource availability to keep staffing flexible and dynamic. However, an over-allocated resource cannot perform work efficiently or complete work by the established end date. Thus, it is important to keep abreast of how your resources are being allocated to investments. Use Resource Planning to monitor resource allocations and to compare resource allocation to availability. Use this tool to change allocations.

Resource Workloads

The workloads page uses a graphical format to display the combined allocations across all the investments for the assigned resource. Use this page to compare the availability with the number of hours allocated for the resource to the investment.

By default, allocations are displayed in color by week. You can use the Time-scaled Value icon on the Options toolbar to change the time period to bi-weekly, monthly, quarterly, or something else.

View Resource Workloads

You can view your resources from the workloads page. To view this page, open Home, and from Resource Management, click Resource Planning.

By default, the chart uses the following colors to allocation information:

- Yellow. Indicates that the resource is allocated at or under availability for that time period.

- Red. Indicates that the resource is over-allocated for that time period.

- Green. Indicates the actuals recorded by the resource for that time period. Only posted actuals appear in the chart. If no actuals have been posted, no actuals appear in the chart.

When you scroll over the histogram for each week, a note summarizing the allocation for a resource and availability for that period appears. Use the note to compare the availability for a resource (for example, 40 hours) to the actual allocation for that period (say, 60 hours). When a resource is overbooked, edit the resource allocations to reduce the amount of time the resource is scheduled to work on an investment.

Edit Resource Workloads

Though you cannot edit resource allocations directly from the workloads page, you can drill down through the histogram to pages to edit. Use the resource/role allocations page to edit resource workloads. To view this page, select Resource Planning from the Resource Management menu. Then, click in one of the time period cells of the histogram for the resource whose allocations you want to edit.

You can also access the resource/role allocations page from the workloads page by clicking the Resource Allocation icon next to the name of the resource.

Edit Resource Allocations

Use the resource/role allocation to edit resource allocation information. You can edit resource allocations from several portlets. Individual investments and resources release information about this page.

To view this page, select Resource Planning from the Resource Management menu, and click Allocations.

The following portlets are displayed:

Weekly Detail

Provides a histogram view of each resource allocation by investment and week.

Unfilled Requirements

Displays a table of each unfilled role and the investments it is assigned to.

Booking Status

Displays a list of all investments that each resource is assigned to. The portlet also displays booking status, and lets you change the booked status of the resource.

Allocation Discrepancy

Displays a list of team records whose intended allocations deviate from the actuals tracked against the investment. Changing the Deviation Threshold percentage in the filter section of the portlet, the resource manager can specify the records to display. You can view only team members to which you have access that are within the specified time frame defined in the portlet.

Weekly Details Portlet

Use the Weekly Details portlet to view and edit allocations by resource and investment by time period. As with the Resource Workloads portlet chart on the workloads page, the Weekly Detail histogram uses the following colors to allocation information:

- Yellow. Indicates that the resource is allocated at or under availability for that time period.

- Red. Indicates that the resource is over-allocated for that time period.

- Green. Indicates actuals recorded by the resource for that time period. Only posted actuals appear in the chart. If no actuals have been posted, no actuals appear in the chart.

When you scroll over the histogram for each week, a note summarizing the allocation and availability of a resource for that period appears. Use the note to compare the availability of a resource with actual allocation for that period. When a resource is overbooked, edit allocations to reduce the amount of time the resource is scheduled to work on an investment.

Edit Resource Allocations by Week

Use the Weekly Detail portlet of the resource planning allocations page to change the allocated hours for a resource assigned to each investment.

Alternatively, click a histogram cell to change the allocation information. The resource/role allocations page appears.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Planning.

   The workloads page appears.

2. Click Allocations.

   The allocations page appears.

3. In the Allocation section of the Weekly Detail portlet, click in the field containing the data and edit the data.

4. Click Save.

How to Work with the Booking Status Portlet

Use the Booking Status portlet to view and edit resource booking status and other allocation information by investment. You can do the following from this portlet:

■ Change the booking status for a resource on an investment (see page 55).

■ Change the dates a resource has been allocated to an investment (see page 56).

■ Change the role on an investment for a resource (see page 56).

■ Change the percentage of time a resource has been allocated to an investment (see page 57).

■ Send an email to a resource (see page 57).

■ Replace a resource on an investment (see page 57).

■ Create or edit allocation curves (see page 58).

Change Resource Booking Status

You can change booking status on an investment for a resource.

Follow these steps:

1. With the resource/role allocations open, click in the field containing the data and edit the data.

Booking Status

Defines the booking status for the resource.

Values:

- Soft. The resource is tentatively scheduled to work on the investment.

- Hard. The resource is committed to work on the investment.

- Mixed. The resource is both soft and hard allocated to the investment or the soft allocation for the resource does not match the hard allocation.

Default: Soft

Required: Yes

2. Click Save.

Edit Resource Investment Allocation Dates

Follow these steps:

1. With the resource/role allocations open, in the Booking Status portlet, click in the field containing the data and edit the data.

2. Click Save.

Edit Resource Role Assignments

Follow these steps:

1. With the resource/role allocations open, in the Booking Status portlet, click in the field containing the data and edit the data.

2. Add or change the investment role for the resource.

   The select role window opens.

3. Select the role check box for the resource.

4. Click Add.

   The Booking Status portlet appears where you can view your selection in the Investment Role field for that resource.

5. Click Save.

Change Resource Allocation Percentages

Instead of changing allocation dates for the resource, change the percentage of time the resource is allocated to the investment.

You can perform the same steps by clicking the highlighted number in the Allocation column for a resource. The allocation page for the resource appears.

Follow these steps:

1. With the resource/role allocations open, in the Booking Status portlet, click in the field containing the data and edit the data.

2. Click the Resource Allocation icon for the resource.

   The allocations page appears.

3. Click in the field containing data and edit the data.

4. Change the number in the Allocation % field.

5. Click Save.

Send Emails to Resources

Many of the resource planning pages contain a mail option that allows you to send an email to the resource you are viewing.

Follow these steps:

1. With the resource/role allocations open, in the Booking Status portlet, click the Email icon to send an email.

   An email window in your default email application opens. The email To: field the email address of the resource.

2. Complete the email and click Send.

   No record of the email sent displays on the Booking Status portlet. But a copy exists in the Sent folder, provided the application is configured to keep copies. Most desktop email applications are configured to keep copies.

Replace Resources

Follow these steps:

1. Click the Resource Finder icon for the resource.

2. Select the new resource to replace the current resource.

3. Click Replace.

Create or Edit Allocation Curves

Allocation curves can be used to allocate time in small periods and to reflect deviations from the default allocation for a resource.

Follow these steps:

1. Click the Properties icon for the resource.

2. Complete the fields.

3. Click Save.

Allocation Discrepancy Portlet

The Allocation Discrepancy portlet displays a list of team members. The intended allocations deviate from the actuals, tracked against the investment, by a certain percentage amount. Only the team members to which you have access rights and that are within a specified time frame display in the list. You can specify the records for display by altering the Deviation Threshold percentage value in the filter section of the portlet. By default, 20 percent is the deviation threshold. To view the filter fields for the portlet, click the Expand Filter icon from the toolbar.

To access this portlet, go to the resource planning allocations page and scroll down to this portlet.

OBS Investment Aggregation Portlet

The OBS Investment Aggregation portlet is the only portlet on the resource planning investments page. To access this page, from any resource planning page, click Investments. The portlet on this page shows aggregated demand for investments by OBS units. Demand is calculated as follows:

■ Hard-booked demand is calculated using the Team Hard Allocation on the staff member properties general page.

■ Total demand (hard and soft) is calculated using the Team Planned Allocation on the staff member properties general page.

To see data on this portlet, expand the filter, filter by an OBS unit type, and click Filter.

Best Practice: Define and save a default filter for this portlet to display appropriate data.

Resource Capacity

Use the capacity page to view available and allocated work by role across all the investments the role is assigned. The capacity page displays workload information for both filled and unfilled roles. By default, this page displays information by month for a six month period starting with the current month. When a role has been overbooked, you can edit their allocations. Such editing helps to reduce the amount of time the role is scheduled to work on an investment.

To access the capacity page, from the workloads page, click Capacity.

This page includes the following portlets:

■   Role Capacity Portlet (see page 59). This portlet shows overall demand vis-a-vis the capacity for resources across all investments aggregated by role. The data is organized for each month and grouped under quarters. You can also see how total demand varies from total capacity for each role.

■   OBS Resource Aggregation Portlet (see page 64). This portlet shows overall demand vis-a-vis the capacity for resources across all investments aggregated by OBS units. You can drill down through the OBS hierarchy into an individual OBS. You can then view the list of investments showing aggregated demand in a time sliced view.

Role Capacity Portlet

The Role Capacity portlet shows overall demand as against the capacity for resources across all investments aggregated by role. A capacity planning portlet, the data therein is organized for each month and grouped under quarters. You can also see how total demand varies from total capacity for each role.

When evaluating role capacity, you can consider planned but yet-to-be hired resources. If they do not actually get hired, you can exclude these resources to view the difference they cause in role capacity. To include or exclude to-be-hired resources, click the Expand Filter icon from the toolbar and indicate the desired option for the Include To-be-hired Resources field.

Use the role capacity capabilities to view the ability of your organization to take on additional work by:

■   Setting the required filtering criteria to see the exact capacity available against a specific demand.

■   Reviewing allocation and availability for each role across all assigned investments.

■   Editing filled role allocations as needed.

Filter by Role, Capacity, Demand, and Investment

The Role Capacity portlet allows filtering by role name and ID, Capacity OBS, Demand OBS, and Investment OBS.

The following describes how filtering works for the different OBS filter fields:

Capacity OBS

This filter field drives the capacity aggregations based on your named resources and your Resource OBS structures, such as team OBS or Location OBS. The Capacity OBS filter calculates the capacity of named resources that belong to the selected Resource OBS. You associate a resource with an OBS from the properties page of the resource.

Demand OBS

This filter field calculates demand for the listed roles based on the following team staff member settings:

- Team staff members with a Team Staffing OBS Unit equal to the selected Demand OBS Unit.

- If a team staff member is not a member of the Staffing OBS unit, verify the resource properties for the Resource OBS type. The properties require to match with the selected Demand OBS unit.

  Note: If the Demand OBS filter field is left blank, the portlet displays all demands per other specified filtering criteria. Use the Include Named Resources drop-down with the Demand OBS to calculate demand for roles only or to include named resources.

To use Capacity and Demand OBS filtering effectively, select a single Resource OBS Type for use in modeling capacity and demand. When assigning a Resource OBS Type, use the same OBS Type for the Default Project Staffing OBS and the Staff Team Member Staffing OBS. You can use different branches of the OBS to represent capacity and demand for different areas of the company. The goal for using a Resource OBS for staffing is to be consistent when using the Resource OBS to filter both capacity and demand. Using the Staffing OBS settings at the project level and the team level allow you to see results that accurately reflect capacity and demand.

Investment OBS

This filter field restricts the capacity and demand results to those investments assigned to the selected OBS. Only team staff members for the selected investments are reflected in the resultant table.

Hide Empty Rows

This filter field allows you to filter out all roles with either capacity or demand numbers that do not match the filtering criteria. If you select this option, empty rows are hidden and only roles that have either capacity or demand that match the filter criteria are displayed.

A role is not required to belong to a specific Resource OBS of demand metrics displaying on the Capacity Planning portlets. When adding the role to a team, set the Staffing OBS on the Properties page to qualify the demand request for the role.

Filtering Examples

Refer to the following examples of how you can use the Role Capacity filtering fields. For all these examples, it is assumed that a Resource OBS Type has been defined for capacity planning purposes. Accordingly, the named resources and the team member Staffing OBS all belong to the same Resource OBS Type structure. The results rendered in the portlet reflect all capacity and demand. The result is based on the logged-in access rights of the user to investments, roles, and named resources.

By Example: Filter the Capacity and Demand for an Entire Organization

Goal. The resource, project, or portfolio manager requires to see the entire organization capacity and demand not filtered by a specific OBS structure.

Required Action. Filter without selecting either a Capacity OBS or a Demand OBS and set the Include Named Resources option to Yes. The idea is not to restrict the capacity and demand results to any OBS structure.

Outcome. The capacity reflects all named resources assigned to the role. Demand reflects all team staffing requirements for the role that is, named resources and unfilled roles.

By Example: Filter the Capacity and Demand for a specific Capacity OBS for an Organization

Goal. The resource, project, or portfolio manager must see the entire organization capacity and demand filtered by a specific Capacity OBS structure.

Required Action: Filter using only a Capacity OBS, but no Demand OBS. Also, set the Include Named Resources option to Yes.

Outcome. Capacity results (named resources) are restricted to those resources who are assigned to the selected Capacity OBS. Demand results (staffing requirements) are not restricted to any OBS structure and include demand for named resources and unfilled roles. Changing the Include Named Resources option to No and re-applying the filter criteria, results limit to the staffing requirements (demand) for unfilled roles.

By Example: Filter the Capacity and Demand for a Specific Investment, Capacity OBS, and Demand OBS for an Organization

Goal. The resource, project, or portfolio manager requires to see the entire organization capacity and demand filtered by a specific investment, capacity, and demand OBS structures.

Required Action. Filter using a Capacity OBS, a Demand OBS, and an Investment OBS. Also, set the Include Named Resources option to Yes.

This example considers the following dependencies:

■ Roles are defined without being assigned to a specific OBS Structure. Roles are then assigned to an Investment team with a team Staffing OBS Unit to reflect the branch (unit) of the Resource OBS structure.

■ Named Resources are assigned roles.

■ Named resources are assigned to a Resource OBS structure.

■ Investments are assigned to an Investment OBS structure.

Outcome. The results rendered in the portlet reflect capacity of named resources assigned to the selected Capacity OBS. The demand reflects the staffing requirements that meet the selected Demand OBS criteria. The demand is restricted to the investments assigned to the selected Investment OBS.

View Available and Allocated Time by Role and Investment

The Role Capacity portlet aggregates role information, allocation and availability for each role for all the investments the role is assigned to. However, you can drill down through the list to view the individual investments to which each role is assigned.

The demand values reflect all your approved investment allocations in FTE hours (assuming eight hours of full effort in a day). The capacity values reflect the list of resources in the system that have the demanded role in question.

Follow these steps:

1. From the Role Capacity portlet, click a role link.

   The properties page appears.

2. Click Allocations.

   The allocations page appears.

3. Click Capacity.

   The capacity page appears.

The role investments capacity page displays each of the investments to which the role is allocated for the current six-month period. The Aggregation section at the bottom of the page illustrates, in red, which months the role is overbooked for (if any). The cursor at the intersection of month and investment, displays a note about the number of the role allocated to the investment for the month.

Edit allocations from either the first-level capacity page or the second-level Capacity page. But drill down to edit the Allocations pages.

Edit Filled Role Allocations by Investment

Edit role allocations from the resource/role allocations summary or detail page. Use the resource/role allocations summary page to change allocation and booking information by investment. The resource/role allocations detail page helps change the number of hours allocated to an investment by week.

Edit Role Allocations by Investment

Use the resource/role allocations summary page to edit role allocations by investment.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Planning.

   The workloads page appears.

2. Click Capacity.

   The capacity page appears.

3. Click the name of the role to edit allocation information.

   The properties page appears.

4. Click Allocations.

   The summary page for the allocation appears.

5. Click in the field containing the data and edit the data.

6. Click Save.

Edit Role Allocations from the Detail Page

Follow these steps:

1. Open Home, and from Resource Management, click Resource Planning.

   The workloads page appears.

2. Click Capacity.

   The capacity page appears.

3. Click the name of the role to edit allocation information.

   The properties page appears.

4. Click Allocations and go to Detail.

   The detail page for the allocation appears.

5. Click in the field containing the data and edit the data.

6. Click Save.

Configure the Role Capacity Portlet

To review resource utilization in terms of allocation or assignment, you can configure the Role Capacity portlet to show variance attributes in individual rows. For example, you can add the following variances for each role and the Compare To variances to compare two capacity planning scenarios:

- Allocation - Assignment

- Capacity - Allocation

- Capacity - Assignment

OBS Resource Aggregation Portlet

The OBS Resource Aggregation portlet, a capacity planning portlet, displays the overall demand vis-a-vis capacity for resources across all investments aggregated by OBS units.

Drill through the OBS hierarchy into an individual OBS to see the list of investments showing aggregated demand in a time sliced view. The portlet allows you to view resource allocation aggregated by the OBS unit. From here, you can link to a detailed list of resources or prior filtered roles to a specific OBS unit.

Follow these steps:

1. Click the Expand Filter icon from the toolbar.

2. Specify an OBS type value.

3. Click Filter.

Best Practice: Define and save a default filter for this portlet to make the data easily accessible.

The following describes how filtering works for the different OBS filter fields:

Resource OBS

Filters all resources and roles by the Resource OBS that matches the filter. For role or OBS-based aggregation, include only roles or OBS units that contain at least one resource who matches the filter. Capacity is limited to the resources with a resource OBS that matches the filter. Demand is limited to the team records linked to a resource with a resource OBS that matches the filter.

Staffing OBS

Filters all team records (including roles) by the Staffing OBS that matches the filter. For role or OBS-based aggregation, include only roles or OBS units that contain at least one team record which matches the filter. Within those roles or OBS units, capacity is not limited. Demand is limited to the team records with a Staffing OBS that matches the filter.

Investment OBS

Filters all investments by the investment OBS that matches the filter. The filter does not limit resources, roles, or OBS units in the list. Capacity is not limited. Demand is limited to the team records on investments with an investment OBS that matches the filter.

View Resource Allocation by OBS

Follow these steps:

1. Open Home, and from Resource Management, click Resource Planning.

   The workloads page appears.

2. Click Capacity.

   The capacity page appears.

3. In the OBS Resource Aggregation portlet, click the Resources icon next to the OBS unit. For example, for Location Resource OBS Type-based aggregated view, see the resource allocation for either France or Germany. The OBS resources page appears to show the monthly allocation of resources for that OBS unit. Allocation or work effort for each resource appears in terms of full-time equivalent (FTE). Note the following:

   ■ 1.00 FTE= Full-time allocation (100 percent)

   ■ 1.50 FTE= Over allocation (150 percent)

   ■ 0.50 FTE= half-time allocation (50 percent)

4. Click a resource link to access the resource properties page and edit the resource availability. Click the Resource Allocation icon for the resource to access the resource/role allocations page. The action also helps you to view the list of investments for the resource.

View Role Allocation by OBS

On the capacity page, you can click a role link to access the role properties page and edit the role availability. Also click the Resource Allocation icon to access the role investments capacity page. The action also helps you to view the role and the associated resources across investments.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Planning.

   The workloads page appears.

2. Click Capacity.

   The capacity page appears.

3. In the OBS Resource Aggregation portlet, click the Roles icon next to the OBS unit. For example, for the Department OBS unit-based view aggregation, see the role allocation for Development, Marketing, or Sales. The OBS roles page appears to show the monthly allocation of roles for that department. For example, the following figure shows the role allocations for the INR department OBS. You can see that the Analyst role is over-allocated at 1.50 FTE.

Chapter 5: Capacity Planning Scenarios

This section contains the following topics:

Capacity Planning Scenarios Overview

Capacity planning scenarios allow you to make informed decisions about resource demands and staffing. Using a capacity planning scenario, you can modify team allocations. You can create a scenario to make temporary changes to your data affecting your overall capacity plan. These temporary changes are never saved or applied to your actual data. Use the capacity planning scenario for analysis before making actual changes.

Based on the criteria you enter and update, the capacity planning scenario changes the demand data that is displayed. Filters offer you the ability to exclude or include to-be-hired resources and soft bookings. The list of investments consisting of resources for inclusion in the capacity planning activities, helps build capacity planning scenarios to study and anticipate utilization.

Capacity planning scenarios are investment aware. The demand from staffing for all investments is counted and displayed when viewing data in a scenario.

You can use capacity planning scenarios with any investment; you do not have to add those investments to the scenario manually. You only require to specify the investments to which you want to make tentative changes.

If you modify an investment while in a scenario, the investment is automatically added to the investments list for the scenario. You can hide an investment from a scenario to display the original or plan-of-record value for the investment. You can also exclude an investment from a scenario to remove it from consideration completely.

Capacity Planning Scenario Behavior

The following lists how a capacity planning scenario behaves:

- You can link a capacity planning scenario to a portfolio as an optional attribute when you initially save the scenario. Linking a capacity planning scenario makes the capacity planning scenario accessible from the portfolio.

- Starting an investment and selecting a capacity planning scenario, sets that scenario as the current one for pages that respond to capacity scenarios.

- In a capacity planning scenario, editing an investment not present in the scenario-enabled page, automatically adds the investment to the scenario.

Terms Used in Capacity Planning Scenarios

The following terms are introduced in capacity planning scenarios:

Capacity

The total availability of resources grouped by resources, roles, or OBS units.

Demand

Demand is the sum of all task assignments by investment allocation. Demand consists of one of the following:

- Allocation demand or the time that a resource is designated to perform work on an investment.

- Assignment demand or the total of the task assignment in an investment. Task assignment information sums actual and estimate-to-complete (ETC), and is also named assignment demand.

Unfilled Demand

The demand to which roles are allocated for an investment.

Unused/Available Capacity

The total capacity minus total allocation demand. Negative unused capacity indicates over-allocation.

Unassigned Work

The total investment allocation minus total investment assignment allocation. Negative unassigned work shows where the assignment allocation exceeds the investment allocation.

Access Capacity Planning Scenarios

You can access and create your capacity planning scenarios from any CA Clarity PPM page that displays the scenario toolbar or a Scenario menu item. The scenario toolbar indicates that the data you are viewing and editing on the scenario-enabled page is not actual data. The changes to a scenario do not affect the plan of record.

From scenario-enabled pages, you can do the following:

- Display tentative information for capacity scenarios

- Switch between the plan of record and the various individual scenarios

- Compare scenarios with other scenarios

    The red-lined values while comparing two scenarios, indicate:

    - Either that the plan of record values

    - Or a second scenario value being compared to the current scenario value.

    No red-lining appears when you view a scenario by itself or view plan of record data by itself.

The capacity planning scenarios selected from the Scenario drop-down allow you view or edit access rights. To exit a scenario, selected Plan of Record from the Scenario drop-down.

How to Work with Capacity Planning Scenarios

Use the scenario-enabled pages to create scenarios and use them as guidelines for planning your investments. Use capacity planning scenarios to address situations similar to the following:

- A development manager who manages a portfolio of investments for several business units must make room for a new investment request.

- A line manager with 20 direct reports must frequently review the resource deployment status to identify those resources that can be under or over-allocated.

- A line manager who shares resources with other organizations must have visibility into the demand for those resources. Thus, requiring the access to data across multiple OBS.

- A project manager creates a project from a template to find out when it can be completed.

You can do the following from scenario-enabled pages:

- Filter on a scenario (see page 70).

- Create new scenarios (see page 70).

- Edit existing scenarios (see page 78).

- Compare scenarios (see page 80).

- Manage investments in a scenario (see page 77).

- Make changes to investments (see page 76).

- Manage scenarios (see page 77).

- Share scenarios (see page 81).

Filter Investments and Resources for Analysis

By default, all resources and investments to which you have access are displayed in a capacity planning scenario. Use the filters on scenario-enabled pages to restrict the investments, roles, or resources that have no relevance to your capacity analysis. And to show a subset of the data currently presented on the page. You can save the parameters of the most recent filter operation across sessions. Such saving aims to eliminate redefining a new filter for each capacity analysis.

Create Capacity Planning Scenarios

You can create capacity planning scenarios from any page that displays Scenario. You can also create scenarios from the manage scenarios page.

Share scenarios with other resources or keep them private. By default, scenarios are private. Use a capacity planning scenario to modify your current investments.

When you view tentative data in a new scenario, the scenario toolbar appears.

Follow these steps:

1. With the investment open, click the down arrow for Scenario, and click New.

    The new scenario is created.

2. Click More and select Edit.

    The properties page appears.

3. Define the following fields:

    Scenario Name

    Defines the name for this scenario.

    Default: New Scenario

    Required: Yes

Portfolio

Defines the portfolio associated to this scenario.

Description

Defines the description. In lists and portlets, displays the description.

Limits: 240 characters

Required: No

Owner

The resource who has primary responsibility for the scenario.

Default: Logged in user

Required: Yes

Planned Cost

Defines the planned cost amount of the investments in the scenario.

Planned Benefit

Defines the planned benefit amount of the investments in the scenario.

4. Click Access to provide resources with access rights to this scenario.

5. Make temporary changes to your investments, resources, or team information. The changes help compare with the plan of record for an investment.

6. Save your changes.

Example

The following example describes one way to work with a capacity planning scenario:

a. While in a scenario, make desired changes to all your future investments and save. You can change the investment start date, change resource allocations, or add more time to your investment.

See the *Project Management User Guide* for more information.

b. From the scenario investments page, approve your future investments to see their effects on your current work capacity. Also approve your investments from the individual investments page.

c. Access the Role Capacity portlet on the capacity page to review the results of your changes. Switch between the different Resource Planning portlets to evaluate capacity and demand in different ways within the scenario. This portlet can help you decide if you require to make any adjustments.

d. On the Role Capacity portlet, drill down on one of your over-allocated roles to access the role properties page.

e. Click Allocations to access the resource planning allocations page. Click in the field containing the data and edit the data.

f. Edit allocation for a role to reduce it or shift the allocation dates.

g. Save your changes.

h. Click Capacity to access the capacity page. The changes display the effect of the overall capacity plan and determine other changes in the planning process.

i. Make any further required changes to adjust your role allocations, add more investments, shift investment dates, or approve or unapprove investments.

j. Save your changes.

Create and Link Capacity Planning Scenarios to Portfolios

When creating a scenario, you have the option to link it to a portfolio. Linking a scenario to a portfolio makes the scenario accessible from the portfolio. However, you can only link a scenario to a portfolio by creating a scenario from the capacity planning scenarios page.

Follow these steps:

1. From a page that displays the scenario toolbar, click More, and go to Manage Scenarios.

    The capacity planning scenarios page appears.

2. Click New.

    The properties page appears.

3. Complete the following fields:

    Scenario Name

    Defines the name for this scenario.

    Default: New Scenario

    Required: Yes

    Portfolio

    Select the portfolio from the drop-down to link this scenario. You can view and select the portfolios you have access to. Link the capacity planning scenario to the portfolio before saving the scenario. Once saved, the portfolio value cannot be changed.

    Description

    Defines the description for this scenario.

Planned Cost

Defines the planned cost amount of the investments in the scenario.

Planned Benefit

Defines the planned benefit amount of the investments in the scenario.

4. Click Save.

The new capacity planning scenario is created and is linked to the portfolio.

By Example: Compare Capacity Planning Scenarios

You can compare a scenario with the plan of record or with another scenario. The comparison allows you to see how the latest scenario changes compare to the plan of record or the last round of changes. When you are comparing scenarios, red-lining appears on the page to help you distinguish between the two sets of data.

The ability to compare scenarios, using red-lining, appears on all project team and some project task pages.

Follow these steps:

1. From the scenario toolbar, select a scenario.

2. Select the plan of record or a second scenario to compare the first scenario from the Compare To drop-down.

3. Navigate through the pages to compare different aspects of the scenarios. Switch between the investment and resource pages to compare role capacity and allocation.

   To see the scenario details as standalone entries without the red-lining, select your planning scenario from the left scenario drop-down. Select None from the right scenario drop-down.

   Scenario 1 is compared with the plan of record. The plan of record data is red-lined and scenario data appears below it. You can compare the resource allocation dates, allocation amounts, and ETC.

   Individual task dates got pushed out for an investment due to schedule changes.

   The investment staffing data is compared against two scenarios. You can compare the following data types for each investment team member between Scenario 1 and Scenario 2:

   ■ The allocation start and finish date

   ■ The total allocation hours

   ■ The ETC

Configure the Capacity Planning List

You can configure the capacity planning list to do the following:

- Include an additional attribute as a secondary comparison value for a list column.

- Secondary values (even if they are null).

- Use red-lining to compare list column values with their secondary values.

These configurations apply only when you are comparing a scenario with another or to the plan of record. These configurations do not apply to the following cases:

- The plan of record is selected.

- A scenario is not compared. None is selected from the Compare To drop-down on the scenario toolbar.

Add a Secondary Comparison Value

Follow these steps:

1. From any capacity planning page that contains a list of data, click the Configure icon from the toolbar.

   The list column layout page appears.

2. Click List Column Section and go to Fields.

   The configure list column fields page appears.

3. Next to the attribute or column label (for example, **%** Allocation), click the Properties icon.

   The list column field page appears.

4. Select the secondary value for the selected attribute from the Secondary Value drop-down.

   For example, select Default Allocation (Compare To) as a secondary value for the % Allocation attribute.

5. Click Save.

   Secondary values are appended with *(Compare To)*.

View Secondary Values and Red-lining

After configuring the planning list, open the capacity planning page to view the results.

Follow these steps:

1. From any capacity planning page that contains a list of data, click the Configure icon from the toolbar.

   The configure list column layout page appears.

2. Click List Column Section and go to Options.

   The configure list options page appears.

   - Select the following options: Mouse-over and redline text

   - Show Null Secondary Values

3. Click Save.

Manage Investments in Capacity Planning Scenarios

Investments can be added to scenarios manually or by using a power filter, or automatically when editing the investment attributes. For example, when you change the start date for an investment or the allocation for a team member. When an investment is added to a scenario, all associated team members are also added automatically to the scenario.

Follow these steps:

On the scenario investments page, do one of the following:

- To add specific investments, click Add. On the Select Investments window, select the investments to include, and click Add.

- To add investments meeting certain filtering criteria, click Add with Power Filter. The select investment type page appears.

- Select an investment type and click Next. The power filter page appears. From this page, you can build an expression that filters for investments. For example, to add investments managed by Sue Smith to the scenario, add the following expression:

  `Investment Manager = 'Smith, Sue'`

  Note: If you add investments using a power filter, you can change data for an *investment expression*. Automatically propagate to all investments added using that investment expression. You require to synchronize the investments occasionally to bring them up-to-date.

Temporarily Hide Investments from Capacity Planning Scenarios

To ignore changes temporarily for an investment in a scenario and let the plan of record values appear, you can hide that investment from the scenario. You can also show an investment to display the scenario values again.

To view a hidden investment, choose No from the Hidden drop down.

Follow these steps:

1. From a page that contains the scenario toolbar, click More, and go to Investments.

   The Resource Requisitions page appears.

2. Next to each investment you want to hide, choose Yes from the Hidden drop down, and click Save.

   The investment is temporarily hidden from the capacity planning scenario.

Remove Investments from Capacity Planning Scenarios

Removing an investment from a scenario removes any changes to that investment from the scenario. The investment then shows the plan of record values.

Follow these steps:

1. From a page that displays the scenario toolbar, click More, and select Investments.

   The investments page appears.

2. Select the check box next to the investment, and then click Remove.

Make Hypothetical Changes to Investments in Capacity Planning Scenarios

You can make hypothetical changes to investments in capacity planning scenarios.

Follow these steps:

1. From a page that includes the scenario toolbar, click More, and go to Investments.

   The investments page appears.

2. Complete the following fields:

   Start

   Defines the investment start date. The value for this field is from the Start Date field on the project properties page.

   Planned Cost

   Defines the planned cost amount of the investments in the scenario.

Approved

Defines the investment as approved or disapproved in the scenario.

Hidden

Defines the temporarily hidden or exposed investment from the scenario.

3. Click Save.

Reset Investments in Capacity Planning Scenarios

While in a capacity planning scenario, you can select investments and refresh the values to reflect the contents of the plan of record. Refreshing the investment values, enables you to undo the changes to an investment without exiting the scenario.

Resetting deletes any changes that were made in the scenario (for that investment) and refreshes it with data from the plan of record. When adding an investment back into the scenario, the investment includes scenario data. But the scenario data is the same as plan of record data unless changed.

Follow these steps:

1. From a page that displays the scenario toolbar, click More, and go to Investments.

   The investments page appears.

2. Select the investments for resetting, and then click Reset.

   The investment is removed from the capacity planning scenario and added again.

Manage Capacity Planning Scenarios

The pages for managing a scenario are common to both capacity planning and portfolio scenarios. The portfolio scenarios are visible on any page that supports capacity planning scenarios. Capacity planning scenarios are not visible on portfolio management pages.

Use the capacity planning scenarios page to create, edit, delete, copy, or set a scenario as the current scenario or the current compare scenario. From the scenario toolbar, click More and select Manage Scenarios.

Edit Capacity Planning Scenario Properties

Owners of capacity planning scenarios have implicit rights to edit their scenarios. Scenario owners can also grant instance access rights to their capacity planning scenarios. You can copy a scenario and edit the new copy. When you grant the access rights, you become the owner of the new capacity planning scenario copy.

Edits or actions are applied to the selected scenario and *not* to the plan of record or actual data. Also, if you edit an investment that was not explicitly added to the scenario, the investment gets automatically added to the scenario in the background. For example, while in a scenario, you modify a team record that does not exist in the scenario with the associated investment. The investment and all the team records are automatically added to the scenario in the background. To edit the plan of record data from the scenario toolbar, select Plan of Record from the Scenario drop-down.

You can edit a limited number of field values for scenario properties, investments, and team properties in capacity planning scenarios or portfolio scenarios. In the absence of the required rights to edit a scenario, all fields on all the scenario pages appear as read-only.

You can also remove or add new investments to this scenario.

Note: In a scenario, the edits are saved as part of the selected scenario.

Follow these steps:

1. On the scenario toolbar, select the scenario from the Scenario drop-down, click More, and select Edit.

   The properties page appears.

2. Complete the following fields:

   Scenario Name

   Enter or change the name of the scenario.

   Portfolio

   This field is read-only because you cannot change the portfolio to which a capacity planning scenario is linked after the scenario is initially saved.

   Description

   Defines the description for this scenario.

   Owner

   The resource that created the scenario appears by default. You can select a different resource as the owner.

   Currency

   Displays the currency code for the portfolio.

Planned Cost

Defines the planned cost amount of the investments in the scenario.

Planned Benefit

Defines the planned benefit amount of the investments in the scenario.

3. Click Save.

Rename Capacity Planning Scenarios

Follow these steps:

1. Open the capacity planning scenario.

   The list page appears.

2. Click a scenario name.

   The properties page appears.

3. Enter a new name in the Scenario Name field, and click Save.

Copy Capacity Planning Scenarios

The list of scenarios available to copy is limited to scenarios to which you have view or edit rights. When you copy a scenario, associated investments are also copied to the new scenario.

Alternatively, you can use the Copy option from the More button on the scenario toolbar.

Follow these steps:

1. From a page that displays the scenario toolbar, click More, and go to Manage Scenarios.

   The capacity page appears.

2. Select the check box next to the scenario, click More, and select Copy.

   A copy of the selected scenario is added to the list and is named *Copy of <Scenario Name>*. This copy is private.

3. Click the name of the scenario.

   The properties page appears.

4. Give the copied scenario a new and unique name, and click Save.

Delete Capacity Planning Scenarios

When you delete scenarios, the selected scenarios, and the associated investment and team member conditions, are also deleted. The investments and team members are deleted only from the selected scenario, not from any other scenario.

Alternatively, you can use the Delete option from the More button on the scenario toolbar.

Follow these steps:

1. From a page that displays the scenario toolbar, click More and select Manage Scenarios.

   The list page appears.

2. Select the check box next to the capacity planning scenario, click More, and select Delete.

   The confirmation page appears.

3. Click Yes to confirm.

Set a Current Scenario

You can select a scenario as the context for all capacity planning scenario-enabled pages by selecting a current scenario directly from the scenario toolbar.

Follow these steps:

1. On the capacity planning scenarios page, select the scenario for the current scenario.

2. Click More and go to Set Current.

   The scenario is now set as the current capacity planning scenario and the default in the Scenario drop-down on any scenario-enabled page.

Set a Compare Scenario

You can select a *compare to* scenario as the context for all capacity planning scenario-enabled pages. You can select a *compare to* scenario by selecting a current compare scenario directly from the scenario toolbar.

Follow these steps:

1. On the capacity planning scenarios page, select the scenario for the current compare scenario.

2. Click More and select Set Compare.

   The scenario is the current capacity planning *compare to* scenario and the default in the Compare To drop-down on any scenario-enabled page.

Reset to Plan of Record

You can deselect any scenarios (current and compare scenarios) to switch to the plan of record.

Follow this step:

1. On the capacity planning scenarios page, click More, and select Reset.

The above action clears the current scenarios and resets all the scenario-enabled pages to the plan of record.

View Role Capacity from a Scenario

From the scenario toolbar, click More and select Go to Capacity Planning to access the resource planning capacity page. From this page, you can view role wise available and allocated work across all the investments. The page shows demand for filled and unfilled role allocations.

Share Capacity Planning Scenarios with Other Resources

Use the scenario access pages to view resources with rights to the capacity planning scenario. You can also use the pages to provide resources with access to the scenarios you create. From the scenario properties page or scenario: investments page, select one of the following from the Access menu:

- Full Access View. View a list of all resource and their rights to the scenario.

- Resource. View resources with explicit rights to this scenario. You can also add resources and grant or remove their access to the scenario.

- Group. View groups with explicit rights to the scenario. You can also add groups and grant or remove their access to the scenario.

Chapter 6: Finding Resources

This section contains the following topics:

Resource Finder Overview

The Resource Finder makes it easy to locate resource information. Use the Resource Finder to locate a resource to fill a requisition and to ascertain availability for an investment. The finder can also help see the employment status, primary role, or skill set for a resource. Use the out-of-box search parameters to find a resource, or create custom searches that are tailored to meet the more specific recruiting requirements.

You can use the Resource Finder to search for labor resources and roles. You cannot use the Resource Finder to locate material, equipment, or expense resources.

The Resource Finder consists of a filter that allows you to specify search criteria. The Resource Finder filter contains a number of standard search parameters such as name, role, ID number, employment type, skills, and availability. You can use these parameters to specify a particular resource, or to locate resources who share certain criteria.

Access the Resource Finder

Access the Resource Finder using one of the following:

Resource Management menu

Select Resource Finder from the Resource Management menu t*o* open the Resource Finder page. This page displays the most robust version of the Resource Finder and contains many search criteria from which you can search resources.

Resource Finder icon

From any staff page, click the Resource Finder icon next to the resource. Use the Resource Finder to perform on-the-spot resource searches to replace overbooked or inappropriately assigned resources to investments. The Resource Finder performs the search using the same characteristics associated with the resource you want to replace.

The search results display the resources you have access rights to. Use the search criteria of the filter to reduce the number of resources that appear in the list.

Standard Resource Finder Search Parameters

Set the fields in the Resource Finder filter to search by a single parameter, multiple or a set of parameters. A few of the filter parameters, such as availability and availability threshold, are designed to work in tandem. For example, you can search for a resource by name (a one-parameter search). Or, search for a resource that has been assigned to a particular role and is a particular employee type (a multiple parameter search).

Effective use of the Resource Finder is through proper filter parameters to locate the desired resources. In addition to the standard filter criteria, you can build power filters.

See the *CA Clarity Basics User Guide* for more information.

The following list describes the standard search parameter names:

Last Name or First Name

Searches for a resource by name.

Resource ID

Defines the unique identifier for the resource. Resource ID is a display only field.

OBS Unit

Searches by OBS unit.

OBS Filter Mode

Selects resources from within the unit. Or, broaden the search to include the unit descendants or ancestors.

Role

Searches by role.

Filter Mode

Searches resources associated with the role selected. Or, broaden the search to include the role descendants or ancestors.

Note: If you select a role, do not use Filter Mode. Some companies decide not to define role hierarchies.

Employment

Searches resource resumes by keywords, such as company name, university, skill. Specify a full-time employee or a contractor to avoid the search results displaying both.

Resume Keywords

If resumes have been attached to the profiles of the resources to which you have access.

Availability

Locates resources available for a certain time period.

Availability Threshold

Enter the percentage of time for the resource. The Resource Finder excludes resource availability below the time specified.

Include Soft-booked Resources

Works with the Availability field. Check mark the field for the search to yield resources that have already been soft-booked for an investment. Otherwise, the search results do not display soft-booked resources.

Skills

Locates resources that have certain skills associated with their profile.

Skills Threshold

Works in tandem with the Skill field. Enter the percentage of skills that resources must possess. The Resource Finder excludes resources whose skill-match falls below the percentage specified.

Power Filter

This link opens a page to build a custom filter.

Appendix A: Portlets

This section contains the following topics:

Allocation Discrepancy Portlet

The Allocation Discrepancy portlet displays a list of team members. The intended allocations deviate from the actuals, tracked against the investment, by a certain percentage amount. Only the team members to which you have access rights and that are within a specified time frame display in the list. You can specify the records for display by altering the Deviation Threshold percentage value in the filter section of the portlet. By default, 20 percent is the deviation threshold. To view the filter fields for the portlet, click the Expand Filter icon from the toolbar.

To access this portlet, go to the resource planning allocations page and scroll down to this portlet.

Investments Portlet

The Investments portlet on the portfolio scorecard displays all included investments having the status as selected from the toolbar.
You have access rights to these investments and they match the view and filter settings you select from the toolbar. For example, if you chose to view unapproved investments, the list displays only the investments with a status other than "Approved".

Use this portlet to do the following:

- View the list of portfolio investments.

- Link to the investment properties page by clicking the investment name.

- Add an investment to a scenario by clicking the Grid with Plus (Add to Scenario) icon that displays next to the investment.

- View the investment ID, goal, alignment, risk, stage, planned cost, and start date, that is included in the portfolio.

- View remaining cost and remaining role allocation for an investment by comparing the values in the following cost and role columns:

    - Actual Cost and Remaining Cost

    - Role Demand, Remaining Role Allocation, and Role Actuals

    Visibility into remaining cost and remaining role allocation is important when planning a portfolio. You can determine how much of the budget remains and how much additional capacity is required. Planning a portfolio becomes easier when you can compare your portfolio budget and role capacity with the correct budget values and the correct role demand.

- Configure the Investments portlet to display financial metrics such as Planned IRR, Planned MIRR, Planned Payback Period, and so on. The investment boundaries and not the portfolio boundaries drive the values for these metrics.

    See the *Financial Management User Guide* for more information.

Follow these steps:

1. With the portfolio open, click Scorecard.

   If this page is minimized to display all portlets, the Investments portlet is the first section on the page.

2. If the page is maximized to display only one portlet at a time, select Investments from the portlet drop-down.

The portfolio values are displayed in the rows at the bottom of the portlet:

- The Aggregation row shows the total for the investments contained in the portfolio

- The Comparison row shows the portfolio data.

- The Variance row shows the difference between the aggregation and the comparison values. A negative variance value indicates the portfolio is over budget. What you select on the portfolio properties page affects the values in the comparison as follows:

    - If you select Total Planned Cost and Total Capacity, then the Planned Cost is compared with portfolio cost.

    - If you select Remaining Cost and Remaining Capacity, then the Remaining Cost is compared with portfolio cost.

Role Filtering and Investments Data

The following explains how data in the Role Demand, Remaining Role Allocation, and Role Actuals columns vary on the Investments portlet. The values vary based on what you have selected from the Portfolio Roles filter:

When you filter on a particular role, then all columns show the numbers related to that role:

- Role Demand shows the aggregated total allocation value of all the resources and roles whose investment role matches the filtered role for each investment.

- Remaining Role Allocation shows the aggregated total remaining allocation value of all the resources and roles. The investment role matches the filtered role for each investment calculated by subtracting Role Actuals from Role Demand.

- Role Actuals show the aggregated total actuals of all the resources and roles whose investment role matches the filtered role for each investment.

When *No Role Assigned* is selected in the filter:

- Role Demand shows aggregated total allocation value of all the resources and roles irrespective of their investment role for each investment.

- Remaining Role Allocation shows the aggregated total remaining allocation value of all the resources and roles irrespective of their investment role for each investment.

- Role Actuals shows the aggregated total actuals of all the resources and roles irrespective of their investment role for each investment.

- The Comparison and Variance aggregation rows under all these three columns are left blank.

No Role Assigned is a special entry that represents demand for resources that do not have a role assigned to them. The values for this entry are included in the aggregated total even when no role option is selected. You can always select No Role Assigned when filtering on a specific role.

Planned Cost Calculations

The following describes what the planned cost values indicate for department and generic portfolios:

- For a generic portfolio, the planned cost value represents the total cost for that investment.

- For a provider department portfolio, the planned cost value represents the total cost for that investment.

- For a customer department portfolio, the planned cost value represents the actual funding amount for that investment. This amount is the full budget amount multiplied by the applicable allocation percentage (that this department bears) expressed in the chargeback rule for that investment. Only the allocation rate in effect on the first date of the portfolio planning horizon is applied. Any time-based variation in chargeback allocation during the portfolio planning horizon is ignored.

Example

Forward Inc created and approved the Fast Track Xchange project. The internal customers, Global Securities and Cash Management divisions have agreed to pay for all costs associated with this project. The following chargeback rules were set up for the project from 1/ 1/ 07 to 12/31/ 08 as follows:

- Year 2007: Global Securities=50percent and Cash Management= 50percent

- Year 2008: Global Securities= 60percent and Cash Management= 40percent

The budget properties for the year 2007 for the project is set up as follows:

- Planned Cost: $300,000

- Planned Cost Start Date: 1/1/2007

- Planned Cost End Date: 12/31/2007

The budget properties for the year 2008 for the project is set up as follows:

- Planned Cost: $400,000

- Planned Cost Start Date: 1/1/2008

- Planned Cost End Date: 12/31/2008

The portfolio manager creates the following customer department portfolios:

- Cash Management 2007 for the period 1/1/2007 to 12/31/2007

- Cash Management 2008 for the period 1/1/2008 to 12/31/2008

Both portfolios belong to the Forward Inc/Cash Management department and include the Fast Track Xchange investment. The portfolio manager navigates to the portfolio scorecard. The planned cost value for the same investment appears as follows in the two portfolios:

■ The Cash Management 2007 portfolio displays the planned cost value for the investment Fast Track Xchange as $150,000 (50 percent of 300,000)

■ The Cash Management 2008 portfolio displays the planned cost value for the investment Fast Track Xchange as $160,000 (40 percent of 400,000)

Investments with Hierarchy

If a chargeback rule is set up for an investment to charge a particular department, then that investment is included in that department customer portfolio.

If both the parent and the child investments have been set to charge a department, charges get aggregated to the top-level parent. Charges get aggregated based on the investment allocation. If only the child investment is included in the portfolio, only the cost associated with it is displayed.

Consider the following example: The budget for investments P1, P2, and A1 is $100,000 each for the year 2007. As P1 and A1 are charged to department D1, both these investments are available in the customer department portfolio for D1. A1 is a child of P1 and P2 and is allocated at 50percent to each parent.

■ Scenario 1. If you include only investment P1 in a portfolio, the portfolio scorecard displays the investment P1 with a planned cost value of $150,000 ($100,000 for P1 + (50 percent of $100,000 for A1))

■ Scenario 2. If you include P1 and A1 in the portfolio, the portfolio scorecard displays the investment P1 with a planned cost value of $100,000. Investment A1 displays with a planned cost value of $100,000.

■ Scenarios 3. If you include only A1 in the portfolio, the portfolio scorecard displays the investment A1 with a planned cost value of $100,000.

Follow these steps:

1. With the portfolio open, click Scorecard.

   The portfolio scorecard appears.

2. Do one of the following:

   ■ If this page is minimized to display all portlets, this portlet is the first portlet.

   ■ If the page is maximized to display only one portlet at a time, select Investments from the portlet drop-down.

Resource Planning Portlet

The Resource Planning portlet is an interactive portlet that contains an Xcelsius visualization with multiple components. This portlet displays on the Resource Planning dashboard. You can access this page from the Resource Management menu. You can use this interactive portlet to identify resource forecasted utilization and the capacity and demand of the roles in the next six months.

You can change the data view by selecting either FTE (full-time employee) or hours.

Before data can display in this portlet, you must run the *Update Business Objects Report Tables*, *Cost Matrix Extraction*, and *Time Slicing* jobs.

Do the following to set up the data for this portlet:

- Set up the entities and departments.

  See the *Financial Management User Guide* for more information.

- Set up the location OBS.

  See the *Administration Guide* for more information.

- Create a role (see page 19).

- Create a resource and associate it with the role.

  See the *Resource Management User Guide* for more information.

- Financially enable the resource (see page 21).

- Create a project and create tasks.

  See the *Project Management User Guide* for more information.

- Add the resource to the project and assign the task to the resource.

- Financially enable the project.

The following information is available:

Average Forecasted Utilization

Displays the utilization of roles in an organization. This gauge component measures the forecasted resource utilization and displays the increase or decrease in cost when the FTE/hours slider is increased or decreased respectively.

Role Capacity/Demand

Displays the total capacity in percentage. This pie chart component shows capacity by role and demand by role. Each pie segment represents the total capacity and demand for a role.

Capacity and Demand

Displays the capacity and demand for a role for the next six months and gives a comparison between demand and capacity by month. This column and line component shows the total capacity and demand for all roles in the current month.

Capacity and Demand by Role

Displays the total capacity and demand for each role for six months starting current month. This list view component shows capacity by role and demand by role in incremental cost information. You can replace a role with resources that can complete the work.

The following columns display:

Role

Displays the roles associated for this project.

Incremental Cost

Displays the increase or decrease in cost when FTE or hours are increased or decreased respectively. The values are taken from the cost matrix.

Capacity

Displays the total number of available hours for the associated resource.

Demand

Displays the total number of assigned or allocated hours for the associated resource.

Remaining Capacity

Displays the difference between the total demand and the total capacity for each month for all investments.

Role Capacity Portlet

The Role Capacity portlet shows overall demand as against the capacity for resources across all investments aggregated by role. A capacity planning portlet, the data therein is organized for each month and grouped under quarters. You can also see how total demand varies from total capacity for each role.

When evaluating role capacity, you can consider planned but yet-to-be hired resources. If they do not actually get hired, you can exclude these resources to view the difference they cause in role capacity. To include or exclude to-be-hired resources, click the Expand Filter icon from the toolbar and indicate the desired option for the Include To-be-hired Resources field.

Use the role capacity capabilities to view the ability of your organization to take on additional work by:

■ Setting the required filtering criteria to see the exact capacity available against a specific demand.

■ Reviewing allocation and availability for each role across all assigned investments.

■ Editing filled role allocations as needed.

OBS Investment Aggregation Portlet

The OBS Investment Aggregation portlet is the only portlet on the resource planning investments page. To access this page, from any resource planning page, click Investments. The portlet on this page shows aggregated demand for investments by OBS units. Demand is calculated as follows:

■ Hard-booked demand is calculated using the Team Hard Allocation on the staff member properties general page.

■ Total demand (hard and soft) is calculated using the Team Planned Allocation on the staff member properties general page.

To see data on this portlet, expand the filter, filter by an OBS unit type, and click Filter.

Best Practice: Define and save a default filter for this portlet to display appropriate data.

OBS Resource Aggregation Portlet

The OBS Resource Aggregation portlet, a capacity planning portlet, displays the overall demand vis-a-vis capacity for resources across all investments aggregated by OBS units.

Drill through the OBS hierarchy into an individual OBS to see the list of investments showing aggregated demand in a time sliced view. The portlet allows you to view resource allocation aggregated by the OBS unit. From here, you can link to a detailed list of resources or prior filtered roles to a specific OBS unit.

Follow these steps:

1. Click the Expand Filter icon from the toolbar.

2. Specify an OBS type value.

3. Click Filter.

Best Practice: Define and save a default filter for this portlet to make the data easily accessible.

The following describes how filtering works for the different OBS filter fields:

Resource OBS

Filters all resources and roles by the Resource OBS that matches the filter. For role or OBS-based aggregation, include only roles or OBS units that contain at least one resource who matches the filter. Capacity is limited to the resources with a resource OBS that matches the filter. Demand is limited to the team records linked to a resource with a resource OBS that matches the filter.

Staffing OBS

Filters all team records (including roles) by the Staffing OBS that matches the filter. For role or OBS-based aggregation, include only roles or OBS units that contain at least one team record which matches the filter. Within those roles or OBS units, capacity is not limited. Demand is limited to the team records with a Staffing OBS that matches the filter.

Investment OBS

Filters all investments by the investment OBS that matches the filter. The filter does not limit resources, roles, or OBS units in the list. Capacity is not limited. Demand is limited to the team records on investments with an investment OBS that matches the filter.

Weekly Details Portlet

Use the Weekly Details portlet to view and edit allocations by resource and investment by time period. As with the Resource Workloads portlet chart on the workloads page, the Weekly Detail histogram uses the following colors to allocation information:

- Yellow. Indicates that the resource is allocated at or under availability for that time period.

- Red. Indicates that the resource is over-allocated for that time period.

- Green. Indicates actuals recorded by the resource for that time period. Only posted actuals appear in the chart. If no actuals have been posted, no actuals appear in the chart.

When you scroll over the histogram for each week, a note summarizing the allocation and availability of a resource for that period appears. Use the note to compare the availability of a resource with actual allocation for that period. When a resource is overbooked, edit allocations to reduce the amount of time the resource is scheduled to work on an investment.

Appendix B: Access Rights

This section contains the following topics:

Resource Access Rights

The following is a list of the access rights required to create, view, and edit resource properties.

Administration - Resources

Allows users to navigate to the administration pages for viewing and editing resources.

Requires: *Resource - Edit Administration* to view individual resources.

Type: Global

Resource - Approve Time

Allows users to approve and reject timesheets for a specific resource. The right does not include the *Resource - Enter Time* right.

Type: Instance

Resource - Create

Allows users to create a resource or role, and edit properties. Lets users create labor and nonlabor resources.

Requires: Resource - Navigate

Type: Global

Resource - Edit

Allows users to edit all information for a specific resource.

Requires: *Resource - Navigate* right

Type: Instance

Resource - Edit - All

Allows users to view and edit information for all resources.

Requires: *Resource - Navigate* right

Type: Global

Resource - Edit Access Rights

Allows users to grant or revoke access rights for a specific resource.

Requires: The *Resource - Edit Administration* right and also the *Resource - View* right or *Resource - View - All*

Type: Instance

Resource - Edit Administration

Allows users to edit a specific resource from administration pages.

Requires: *Administration - Resources* right.

Type: Instance

Resource - Edit Calendar

Allows users to edit their own calendar.

Requires: *Resource - Navigate* right

Type: Instance

Resource - Enter Time

Allows users to complete and submit timesheets for a specific resource.

Type: Instance

Resource - External Access

Allows you access to the Resource list and Resource Finder. The *Resource - View* right allows you to view the general information, contact information, financial information, calendar, and skills of resources.

Type: Global

Resource - Hard Book

Lets you soft and hard book a specific resource for investments to which you have view or edit rights.

Type: Global

Resource - Hard Book - All

Allows users to soft and hard book all resources for investments to which they have view or edit rights.

Type: Global

Resource - Navigate

Allows you to access resource management pages.

Type: Global

Resource - Soft Book

Allows you to soft book a specific resource or role to an investment.

Type: Instance

Resource - Soft Book - All

Allows you to soft book any resource for investments to which you have view or edit rights.

Type: Global

Resource - Update Skills

Allows users to create, edit, and view the skills for a specific resource to which they have R*esource - View* access right. The privilege also allows users to view information about the resource.

Requires: *Resource - View* right

Type: Global

Resource - Update Skills

Allows users to create, edit, and view the skills of all resources. The privilege also allows users to view general information of resources.

Requires: *Resource - View* access right

Type: Global

Resource - View

Allows you to view all of information for a specific resource, except for financial information.

Type: Instance

Resource - View - All

Lets you view information, except the financial properties of all resources.

Type: Global

Resource - View Access Rights

Allows users to view access rights for a specific resource.

Requires: *Resource - View* right or *Resource - Edit Administration* right

Type: Instance

Resource - View Book

Allows you to view bookings for a specific resource.

Type: Instance

Resource - View Book - All

Lets you view bookings for all resources.

Type: Global

Resource - View Financial

Allows you to view financial information for a specific resource.

Type: Instance

Resource - View Financial - All

Lets you view financial properties for all resources. The right is dependent on being granted the Resource - Navigate right.

Type: Global

Scenario Access Rights

Best Practice: Capacity planning scenarios are designed for you to view a subset of all resources or investments. Limit resources or investments through a security OBS or through instance-level resource access rights. A more manageable amount of data displays for those resources and investments you manage. Additionally, avoid accessing capacity planning scenarios as a CA Clarity PPM administrator or as a user with global access rights to all resources.

The following access rights are available to work with capacity planning scenarios:

Scenario - Edit

Allows users to edit and delete a specific scenario.

Includes: *Scenario - View* and the ability to delete the Scenario

Requires: *Portfolio - Navigate*

Type: Global

Scenario - Edit Access Rights

Allows users to edit access rights for a specific scenario.

Requires: *Portfolio - Navigate* right, *Portfolio - View* right, or *Scenario - View* right

Type: Instance

Scenario - Manager - Automatic

When you create a scenario, access is automatically assigned. The access allows you to view, edit, and delete scenarios that you own. You can also view, edit, and delete access for that scenario.

Type: Global

Scenario - Navigate

Allows users to view the Scenario toolbar on capacity planning scenario-enabled pages and create new scenarios.

Type: Global

Scenario - View

Allows users to view a specific scenario.

Requires: Portfolio - Navigate right or *Portfolio - View* right.

Type: Instance

Additional Access Rights for Requisitions

In addition to Resource access rights, you many need the following rights to manage requisitions:

Project - Attach Requisitions Resources

Lets you attach resources to requisition entries and includes adding, editing, proposing, or deleting resources from the request results page. The privilege lets users to change project statuses to "Proposed" and "Booked". This right includes the Project – View Requisitions access.

Type: Instance

Project - Create/Edit Requisitions

Allows you to create new requisitions, edit existing requisitions, and delete requisitions. Also, allows you to view the requisition resources and change a requisition status at any time. With this access right, if you also have the *Project - Edit* rights, then you can also accept requisitions.

Type: Global

Project - View Requisitions

Allows the user to view requisitions and the requisition resources.

Type: Global

Process - Create Definition

Allows you to create new process definitions for a requisition.

Type: Global

Process - Initiate

Allows you to start a new process instance for a requisition.

Type: Global