

# CA Clarity™ PPM

## Resource Management User Guide

Release 13.1.00



This Documentation, which includes embedded help systems and electronically distributed materials, (hereinafter referred to as the "Documentation") is for your informational purposes only and is subject to change or withdrawal by CA at any time.

This Documentation may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of CA. This Documentation is confidential and proprietary information of CA and may not be disclosed by you or used for any purpose other than as may be permitted in (i) a separate agreement between you and CA governing your use of the CA software to which the Documentation relates; or (ii) a separate confidentiality agreement between you and CA.

Notwithstanding the foregoing, if you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all CA copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to CA that all copies and partial copies of the Documentation have been returned to CA or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, CA PROVIDES THIS DOCUMENTATION "AS IS" WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL CA BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF CA IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is CA.

Provided with "Restricted Rights." Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19(c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright © 2012 CA. All rights reserved. All trademarks, trade names, service marks, and logos referenced herein belong to their respective companies.

# Contact CA Technologies

## Contact CA Support

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

- 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](mailto:techpubs@ca.com).

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 1: Resource Management Overview 9**

About Resource Management .....	9
Resource Management Components.....	10
Resource Management Jobs .....	10

## **Chapter 2: Managing Resources 11**

Resources and Roles.....	11
How to Create Resources and Roles .....	12
Create a Labor Resource .....	12
Create a Non-Labor Resource .....	16
Create a Role.....	19
Manage General Resource and Roles Properties.....	21
Financial Attributes for Resources and Roles.....	21
Add Contact Information .....	24
Skills for Labor Resources.....	24
Associate Skills with Labor Resources .....	25
View a List of Skills Associated to Labor Resource .....	25
Assign Skill Proficiency and Interest Levels to a Labor Resource .....	26
Resource and Role Allocations .....	27
Edit a Resource or Role Allocation .....	27
Add Investments to Resource Workloads.....	31
Remove Investments from Resource Workloads.....	31
Replace Resources on Investments.....	32
Calendar Associations .....	34
Edit Resource and Role Properties and Associations .....	34

## **Chapter 3: Requisitions 35**

Resource Requisition Overview .....	35
Set a Default Booking Manager for Resources .....	36
Requisition Routing and Notification .....	36
Types of Requisition Status .....	37
Access Resource Requisitions.....	39
Filter the Requisitions List .....	39
Manage Resource Requisitions .....	39
Fulfill Requested Staffing Needs .....	40
Named Resource Requisitions .....	41

---

Address Role Requests Using Requisitions .....	44
Decline an Open Resource Requisition .....	46
Requisition Discussions .....	46
Start and Reply to Discussions .....	47
View the Discussion Thread .....	48
Manage Automated Requisition Processes.....	49
Create Processes for Resource Requisitions .....	50
Track the Progress of Processes.....	50
Delete Processes .....	51
View Audit Fields for Requisitions.....	51

## **Chapter 4: Resource Planning** **53**

Overview .....	53
Resource Planning Portlets .....	55
Role Capacity Histogram Portlet .....	56
Role Capacity Portlet.....	57
OBS Resource Aggregation Portlet.....	57
OBS Investment Aggregation Portlet .....	58
Top Down Planning by Investment Portlet .....	59
Resource Workloads .....	59
Weekly Detail Portlet .....	60
Allocation Discrepancy Portlet .....	61
Unfilled Requirements Portlet .....	61
Booking Status Portlet.....	62

## **Chapter 5: Capacity Planning Scenarios** **65**

Capacity Planning Scenarios Overview.....	65
Capacity Planning Scenario Behavior .....	66
Terms Used in Capacity Planning Scenarios.....	66
Access Capacity Planning Scenarios .....	67
How to Work with Capacity Planning Scenarios .....	67
Filter Investments and Resources for Analysis.....	68
Create Capacity Planning Scenarios .....	68
Create and Link Capacity Planning Scenarios to Portfolios .....	70
Example: Compare Capacity Planning Scenarios .....	71
Configure the Capacity Planning List.....	72
Manage Investments in Capacity Planning Scenarios .....	73
Temporarily Hide Investments from Capacity Planning Scenarios .....	74
Remove Investments from Capacity Planning Scenarios .....	74
Make Hypothetical Changes to Investments in Capacity Planning Scenarios .....	74
Reset Investments in Capacity Planning Scenarios .....	75

---

Manage Capacity Planning Scenarios.....	75
Edit Capacity Planning Scenario Properties .....	76
Rename Capacity Planning Scenarios .....	77
Copy Capacity Planning Scenarios.....	77
Delete Capacity Planning Scenarios .....	78
Set a Current Scenario.....	78
Set a Compare Scenario .....	78
Reset to Plan of Record .....	79
View Role Capacity from a Scenario .....	79
Share Capacity Planning Scenarios with Other Resources .....	79

## **Chapter 6: Finding Resources** **81**

Resource Finder Overview .....	81
Access the Resource Finder .....	81
Standard Resource Finder Search Parameters.....	82

## **Appendix A: Access Rights** **85**

Resource Access Rights .....	85
Scenario Access Rights .....	89
Additional Access Rights for Requisitions .....	89



# Chapter 1: Resource Management Overview

---

This section contains the following topics:

[About Resource Management](#) (see page 9)

[Resource Management Components](#) (see page 10)

[Resource Management Jobs](#) (see page 10)

## 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](#) (see page 11)

[How to Create Resources and Roles](#) (see page 12)

[Manage General Resource and Roles Properties](#) (see page 21)

[Skills for Labor Resources](#) (see page 24)

[Resource and Role Allocations](#) (see page 27)

[Calendar Associations](#) (see page 34)

[Edit Resource and Role Properties and Associations](#) (see page 34)

## 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 *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 *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 and Roles Properties

Associations are defined from main resource and role properties pages.

Use the following pages 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.

## Financial Attributes for Resources and Roles

You can add or edit attributes for any resource or role that is involved with financial activities, such as posting transactions, populating cost plans, and processing charge backs. When you financially enable the resource or role, you specify whether the role or resource is active financially, and you provide key information such as the location and transaction class values.

To enable financial attributes, you must have the access rights listed in the following table:

Task	Access Right <sup>1</sup>
Edit financial attributes for a specific resource or role.	One of the following rights: <ul style="list-style-type: none"> <li>■ <i>Resource - Edit</i></li> <li>■ <i>Resource - Edit Financial</i></li> </ul>

Edit financial attributes for all resources and roles.	One of the following rights: <ul style="list-style-type: none"><li>■ <i>Resource - Edit - All</i></li><li>■ <i>Resource - Edit Financial - All</i></li></ul>
--	--

<sup>1</sup> These access rights require the *Resource - Navigate* access right.

- [Financially Enable a Resource](#) (see page 22)
- [Financially Enable a Role](#) (see page 23)

## Financially Enable a Resource

Enable the financial attributes for any type of resource that is involved with financial management.

### Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Click the name of the resource.
3. Click Properties and click Financial.
4. Complete the required fields.

The following fields require explanation:

#### Financially Active

Indicates whether the financial attributes for a resource are enabled. A resource that is financially inactive cannot be used in the rate matrix. The product uses NULL for the financial attributes that are associated with that resource.

Select Financially Active to enable the resource to record financial management activities against an investment.

#### Transaction Class

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

#### Resource Class

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

If the resource is a labor type, complete the department and location fields to be able to mark the resource as financially active.

5. Save your changes.

## Financially Enable a Role

Enable financial attributes for any type of role that is involved with financial activities.

### Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Click the name of the role.
3. Click Properties and click Financial.
4. Complete the required information.

The following fields require explanation:

#### Financially Active

Indicates whether a role is financially active.

Select Financially Active to enable the role to record financial management activities against an investment.

#### Transaction Class

Identifies the transaction class for the role. Used with financial processing. This value must be the same type as the role itself.

#### Resource Class

Identifies the resource class for the role. Used with financial processing. This value must be the same type as the role itself.

5. Click Save.

### Example: Create a Cost Plan using Roles

You are planning a project that starts in eight months and must create a cost plan. You estimate that the project needs one project manager, five engineers, and two quality assurance engineers; however, the named resources are not yet assigned to the project. The cost driver is transaction class. If roles are financially enabled, you can staff the project with the known roles, and create a cost plan that is grouped by transaction class. You can obtain the transaction class from the roles that are staffed on the project for the financial plans.

## 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.

### **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](#) (see page 35)

[Access Resource Requisitions](#) (see page 39)

[Manage Resource Requisitions](#) (see page 39)

[Fulfill Requested Staffing Needs](#) (see page 40)

[Requisition Discussions](#) (see page 46)

[Manage Automated Requisition Processes](#) (see page 49)

## 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 requester and booking manager are both 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:

<b>Requisition Status Changes</b>	<b>Requested By</b>	<b>Booking Manager</b>
Created		
From New to Open		Notified
From Open to New		Notified
From Open to Propose	Notified	
From Proposed to Booked	Notified	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 *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 *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.

Unbooking a resource removes hard allocation for the resource in the future. The start date of unbooking is set to the next day by default. You can move the start date to an earlier date if you want.

### 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 *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.  
The confirmation page appears.
2. Click Delete.
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](#) (see page 53)

[Resource Planning Portlets](#) (see page 55)

## Overview

Use Resource Planning to monitor resource allocations and to compare resource allocation, availability, remaining work, and actuals. The following list defines these terms:

### **Allocation**

Resource time that is booked to an investment.

### **Availability**

Resource time that is available for booking.

### **Remaining work**

Future work for a resource on an investment. This term is also known as estimate to complete (ETC).

### **Actuals**

Work that has been completed and posted to an investment.

Availability is defined on the Resource Properties page. In the Availability field, enter the number of hours that a resource is available for work or is expected to work in one business day. The default number for this field is 8. The following equation shows how weekly availability is calculated:

Weekly Availability = (Availability) x (Number of business days per week in the assigned resource calendar)

For example, if the Availability value for a resource is 8 and the resource calendar shows five workdays per week, the equation shows the following result:

Weekly availability = 8 x 5 = 40 hours per week

Booking a resource to an investment as a staff member is known as allocating a resource to the investment. An allocation amount is generated for each resource. The following equation is used to calculate resource allocation for an investment:

Resource allocation amount = (Availability) x (Number of resource workdays during the investment time period)

The number of working days for an individual resource during an investment is based on the resource calendar. All days that a resource is available during an investment time period are counted, including the start and finish dates.

For example, the following list shows the weekly availability of some resources during an investment time period:

- Resource A works four hours a day for five days a week
- Resources B works eight hours a day for five days a week
- Resource C works eight hours a day for three days a week

If all the resources are allocated at 100 percent to the investment for three weeks, their allocation is as follows:

- Resource A = 60 hours
- Resource B = 120 hours
- Resource C = 72 hours

If you attempt to over-allocate a resource by staffing the resource to additional investments, you are warned. An over-allocated resource cannot perform work efficiently or complete work by the established end date. For this reason, it is important to be aware of how resources are allocated to investments.

Use Resource Planning to manage resource and role allocations in the following ways:

- By investment by week
- By investment start and finish dates
- For a single investment or 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

Changes that you make on the Resource Planning pages update the data on the investment. You can view the changes that you make on the Resource Planning pages on the Team Staff page for the investment.

**Best Practice:** When you adjust resource allocations, inform the investment manager about the changes. The manager can then adjust task assignments and the schedule for the investment to accommodate the changes to team members you introduced.

## Resource Planning Portlets

The following table lists the Resource Planning pages with portlets.

Resource Planning Page	Description	Portlets
Capacity	The page shows overall resource demand against resource capacity across all investments. The page aggregates information by role and presents information by month. You can view how total demand varies from total capacity for each role.	<ul style="list-style-type: none"> <li>■ Role Capacity Histogram</li> <li>■ Role Capacity</li> </ul>
Organizational Demand	This page lists and aggregates demand for all investments and resources by OBS. You can view allocation data at different levels within the selected OBS unit.	<ul style="list-style-type: none"> <li>■ OBS Resource Aggregation</li> <li>■ OBS Investment Aggregation</li> </ul>
Top Down Planning	This page lists investments and the resources and roles that are allocated to each investment.	<ul style="list-style-type: none"> <li>■ Top Down Planning by Investment</li> </ul>
Workloads	This page uses a graphical format to display the combined allocations across all investments for the assigned resource. Use this page to compare the availability with the number of hours that are allocated for a resource to an investment.	<ul style="list-style-type: none"> <li>■ Resource Workloads</li> </ul>

Resource Planning Page	Description	Portlets
Allocations	This page provides several options to view and edit resource allocations on individual investments.	<ul style="list-style-type: none"> <li>■ Weekly Detail</li> <li>■ Allocation Discrepancy</li> </ul>
Unfilled Allocations	This page provides a list of roles that are booked to all investments and shows unfilled demand across your organization.	<ul style="list-style-type: none"> <li>■ Unfulfilled Requirements</li> </ul>
Bookings	This page provides a list of resources with information about their booking status for all investments.	<ul style="list-style-type: none"> <li>■ Booking Status</li> </ul>

## Role Capacity Histogram Portlet

### Portlet Properties

Portlet ID: projmgr.roleCapacityHistogram

System Provider: Roles with Resource Allocation

### Description

The Role Capacity Histogram portlet shows overall demand against capacity for roles across all investments. The information is aggregated by role and is organized for each month and grouped under quarters. You can view how total demand varies from total capacity for each role. The information is shown in a graphical format with the information stacked vertically in each month's column.

The colors in the graph represent the following information:

- Yellow: Demand.
- Red: Demand that exceeds the role capacity.

**Note:** The threshold is set to change the bar color from yellow to red when the demand exceeds capacity.

You can complete the following tasks on the portlet to view detailed information:

- Click the Role name to view the properties page for the role.

- Click the Resource Allocation icon on a role row to view how the role is allocated over multiple investments.

## Role Capacity Portlet

### Portlet Properties

Portlet ID: projmgr.roleCapacity

System Provider: Roles with Resource Allocation

### Description

The Role Capacity portlet shows overall demand against resource capacity across all investments. The information is aggregated by role and is organized for each month. You can view 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 planned hires 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.

You can complete the following tasks on the portlet to modify role capacity:

- Click the Role name to view the properties page for the role.
- Click the Resource Allocation icon on a role row to view how the role is allocated over multiple investments.

## OBS Resource Aggregation Portlet

### Portlet Properties

Portlet ID: projmgr.OBSResourceAggregation

System Provider: OBS Resource Aggregation

### Description

The OBS Resource Aggregation portlet displays the overall demand and capacity for resources across all investments. The information is aggregated by OBS units. Drill through the OBS hierarchy to an individual OBS to view resource allocation by OBS unit.

To see data on this portlet, expand the filter, set an OBS unit type and click Filter. We recommend defining and saving a default filter for this portlet so that it automatically displays data that is appropriate for your organization.

Use the following links on the portlet to view the detailed data that contributes to the aggregated totals that appear in the histogram:

- Click the Resources icon for an OBS unit to open a detail portlet named OBS Resources that displays monthly allocation for resources in the OBS unit. Allocation for each resource appears in terms of a full-time equivalent (FTE). The following list shows how FTE is measured:
  - 1.00 FTE = Full-time allocation (100 percent)
  - 1.50 FTE = Over allocation (150 percent)
  - 0.50 FTE = Half-time allocation (50 percent)
- Click the Roles icon for an OBS unit to open a detail portlet named OBS Roles that displays the monthly allocation for roles. For example, if your view is aggregated by the Department OBS unit, you can view the role allocation for the Development, Marketing, or Sales departments.
- From the OBS Roles or OBS Resources detail portlets, you can use links to drill down and view or edit individual role or resource allocations.

## OBS Investment Aggregation Portlet

### Portlet Properties

Portlet ID: projmgr.OBSInvestmentAggregation

System Provider: OBS Investment Aggregation

### Description

The OBS Investment Aggregation portlet shows the aggregated demand for investments by OBS units. Demand is calculated using the planned allocation for all resources booked to investments for the selected OBS units.

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

You can complete the following tasks on the portlet:

- Click the Investments icon for an OBS unit to open a detail portlet named OBS Investments. The detail portlet displays aggregated demand data for each investment assigned to the OBS unit.
- From the OBS Investments portlet, click an investment name to open the Team: Role Capacity page for the investment. This page lets you view and edit resource and role team data for an investment.

## Top Down Planning by Investment Portlet

### Portlet Properties

Portlet ID: projmgr.topDownPlanning

System Provider: Team Allocations

### Description

This portlet lists the resources and roles for each investment. The allocation by month for each resource is provided. Use this portlet to edit the resources and allocations for an investment.

You can complete the following tasks on the portlet to modify resource allocation:

- Click the investment name to view the Staff page for the investment. You can edit the allocation from the Staff page.
- Click the Resource Finder icon on a resource row to locate a replacement for a resource or to replace a role with a named resource.
- Click the Resource Allocation icon on a resource row to view how the resource is allocated over multiple investments.
- Click inside an allocation cell for a resource or role to change the allocation value.
- Click the resource or role name to view the properties page.

## Resource Workloads

### Portlet Properties

Portlet ID: projmgr.resourceWorkloads

System Provider: Resources with Aggregation

### Description

The Resource Workloads portlet 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 that are allocated for a resource by investment.

By default, allocations are displayed in color by week. You can use the Time-scaled Value option available from the Options menu to change the time period to bi-weekly, monthly, or quarterly.

The colors in the graphical portion of the portlet represent the following information:

- Yellow: Indicates that a resource is allocated at or under availability for the time period.
- Red: Indicates that a resource is over allocated for the time period. Over allocation means the amount of time booked exceeds resource availability.

You can complete the following tasks on the portlet to modify resource allocation:

- Click the resource name to view the properties page for the resource.
- Click the Resource Allocation icon on a resource row to view how the resource is allocated over multiple investments.
- Click inside an allocation cell for a resource or role to view how the resource is allocated over multiple investments.

## Weekly Detail Portlet

### Portlet Properties

Portlet ID: projmgr.weeklyDetail

System Provider: Team Allocations

### Description

The Weekly Detail portlet provides the resource allocations for each investment for a 10-week default period.

You can complete the following tasks on the portlet to modify resource allocation:

- Click the Properties icon for a resource to open the Staff Member Properties page for the investment.
- Click the Resource Finder icon on a resource row to locate a replacement.
- Click the resource name to view the properties page for the resource.
- Click the Resource Allocation icon on a resource row to view how the resource is allocated over multiple investments. You can edit the allocation for the resource.
- Click the Envelope icon on a resource row to send an email to the resource.
- Click an investment name to view all team members allocated to the investment.
- Click inside an allocation cell for a resource to change the allocation for that time period.

## Allocation Discrepancy Portlet

### Portlet Properties

Portlet ID: projmgr.allocationDiscrepancy

System Provider: Actuals vs Allocation Discrepancy

### Description

This portlet shows the difference between allocated hours for a resource and the actual hours that the resource charged for investments. You can specify which resources to display by altering the Deviation Threshold percentage value in the filter section of the portlet. By default, 20 percent is the deviation threshold. The Duration field determines how many periods to use for the calculation of allocations and posted actuals. The Time Scale field determines the period length to use for the calculation.

You can complete the following tasks on the portlet to modify resource allocation:

- Click the resource name to view the properties page for the resource.
- Click the Resource Allocation icon on a resource row to view how the resource is allocated over multiple investments.
- Click the Properties icon for a resource to open the Staff Member Properties page for the investment.
- Click the Resource Finder icon for a resource to locate a replacement.

## Unfilled Requirements Portlet

### Portlet Properties

Portlet ID: projmgr.unfilledAllocations

System Provider: Team Allocations

### Description

This portlet shows roles that are booked to investments. The roles represent demand within the organization. Typically, named resources replace roles as part of staffing activities.

You can complete the following tasks on the portlet to modify resource allocation:

- Click the Properties icon for a resource to open the Staff Member Properties page for the investment.
- Click the Resource Finder icon to locate a named resource to replace the role.

- Click a requirement name to open the Staff Member Properties page for the investment.
- Click a role name to view the properties page for the role.
- Click the Resource Allocation icon on a role row to view how the role is allocated over multiple investments.
- Click an investment name to view the Team - Staff page for the investment. You can edit the allocation from the Staff page.
- Click the Allocation value on a role row to view how the role is allocated over multiple investments.
- Click in a cell to edit. If the cell activates, you can edit the cell contents. Read-only values cannot be edited from this page.

## Booking Status Portlet

### Portlet Properties

Portlet ID: projmgr.bookingStatus

System Provider: Team Allocations

### Description

Use the Booking Status portlet to view and edit resource booking status and other allocation information by investment. The portlet provides the following information for each resource by investment: Role, booking status, start and finish dates, allocation hours, and allocation percentage.

You can complete the following tasks on the portlet to modify resource allocation:

- Click the Properties icon for a resource to open the Staff Member Properties page for the investment.
- Click the Resource Finder icon for a resource to locate a replacement.
- Click the resource name to view the properties page for the resource.
- Click the Resource Allocation icon on a resource row to view how the resource is allocated over multiple investments.
- Click the Envelope icon on a resource row to send an email to the resource
- Click the investment name to view the Staff page for the investment. You can edit the allocation from the Staff page.

- Click the Allocation value on a resource row to view how the resource is allocated over multiple investments.
- Click in a cell to edit. If the cell activates, you can edit the cell contents. Read-only values cannot be edited from this page.



# Chapter 5: Capacity Planning Scenarios

---

This section contains the following topics:

[Capacity Planning Scenarios Overview](#) (see page 65)

[Capacity Planning Scenario Behavior](#) (see page 66)

[Terms Used in Capacity Planning Scenarios](#) (see page 66)

[Access Capacity Planning Scenarios](#) (see page 67)

[How to Work with Capacity Planning Scenarios](#) (see page 67)

## 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 68).
- [Create new scenarios](#) (see page 68).

- [Edit existing scenarios](#) (see page 76).
- [Compare scenarios](#) (see page 78).
- [Manage investments in a scenario](#) (see page 75).
- [Make changes to investments](#) (see page 74).
- [Manage scenarios](#) (see page 75).
- [Share scenarios](#) (see page 79).

## 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.

**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.

## 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](#) (see page 81)

[Standard Resource Finder Search Parameters](#) (see page 82)

## 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 to 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 *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: Access Rights

---

This section contains the following topics:

[Resource Access Rights](#) (see page 85)

[Scenario Access Rights](#) (see page 89)

[Additional Access Rights for Requisitions](#) (see page 89)

## Resource Access Rights

The following access rights allow you 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* right 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. The right allows users to create labor and nonlabor resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

### Resource - Edit

Allows users to view and edit general information, contact information, financial information, skills, and the calendar for a resource.

**Requires:** *Resource - Navigate* right

**Type:** Instance

### Resource - Edit - All

Allows users to view and edit general information, contact information, financial information, skills, and calendar 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 either the *Resource - View* or the *Resource - View - All* right

**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 - Edit Financial**

Allows users to view general and financial properties, and to edit only the financial properties of a resource.

**Requires:** *Resource - Navigate* right

**Type:** Instance

**Resource - Edit Financial - All**

Allows users to view general and financial properties, and to edit only the financial properties for all resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

**Resource - Edit General**

Allows users to view and edit general information, contact information, skills, and the calendar of a resource.

**Requires:** *Resource - Navigate* right

**Type:** Instance

**Resource - Edit General - All**

Allows users to view and edit properties for a resource: general information, contact details, skills, and their calendar.

**Requires:** *Resource - Navigate* right

**Type:** Global

**Resource - Enter Time**

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

**Type:** Instance

**Resource - External Access**

Allows users access to the Resources, Resource Finder, and Resource Requisitions menus and property pages under Resource Management. Control user read/write access to data on these pages by setting the instance and global access rights for resources, projects, and requisitions.

**Type:** Global

**Resource - Hard Book**

Allows users to soft and hard book a specific resource for investments to which they 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 users to access resource management pages.

**Type:** Global

**Resource - Soft Book**

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

**Type:** Instance

**Resource - Soft Book - All**

Allows users to soft book any resource for investments to which they 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 *Resource - 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* right

**Type:** Global

**Resource - View**

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

**Type:** Instance

**Resource - View - All**

Allows users to 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 users to view bookings for a specific resource.

**Type:** Instance

**Resource - View Book - All**

Allows users to view bookings for all resources.

**Type:** Global

**Resource - View Financial**

Allows users to view general and financial information for a specific resource.

**Required:** *Resource - Navigate* right

**Type:** Instance

**Resource - View Financial - All**

Allows users to view financial properties for all resources.

**Required:** *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 may 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