

CA Clarity™ PPM

Resource Management User Guide

Release 13.2.00



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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:

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

[Create a Resource or a Role](#) (see page 14)

[Define Resource and Role Properties](#) (see page 21)

[Add Skills Associated with Labor Resource](#) (see page 23)

[Manage General Resource and Roles Properties](#) (see page 24)

[Resource and Role Allocations](#) (see page 25)

[Calendar Associations](#) (see page 33)

[Edit Resource and Role Properties and Associations](#) (see page 33)

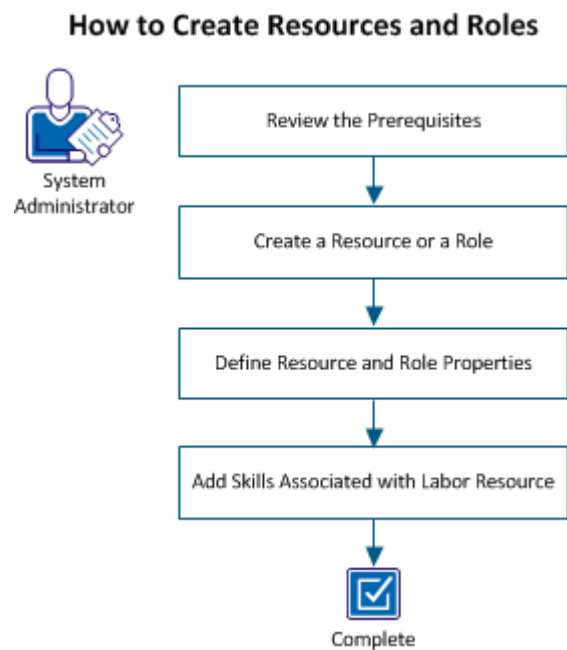
How to Create Resources and Roles

Before you can deploy skilled professionals to the right project teams, you need to create the named resources and generic roles in the application. A *resource* is a person or an 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. Resources and roles are categorized into labor and non-labor resources and roles. Non-labor resources and roles include equipment, material, and expense.

Example: Create resources and roles

Forward Inc., recruited ten resources through the campus recruitment this year. All these resources are allocated 100 percent to a training project in the following capacities: developer, quality engineer, and information engineer. The system administrator has to create labor and non-labor resources and roles for the project.

The following diagram describes how a system administrator creates a resource and a role:



To create a resource and a role, perform these steps:

1. [Review the prerequisites](#) (see page 14).
2. Create a resource or a role.
 - a. [Create a labor resource](#) (see page 15).
 - b. [Create a non-labor resource](#) (see page 17).
 - c. [Create a role](#) (see page 19).
3. Define resource and role properties.
 - a. [Add resource contact information](#). (see page 21)
 - b. Enable the financial properties.
 - [Enable the resource financially](#) (see page 22).
 - [Enable the role financially](#) (see page 23).
4. Add skills associated with labor resource.
 - a. [Associate skills with labor resource](#) (see page 23).
 - b. [Assign skill proficiency and interest levels](#) (see page 24).

Review the Prerequisites

To complete all steps in the scenario, complete the following tasks:

- Create the skills for the resources
- Verify that you have been assigned the following access rights:

<i>Administration - Resources</i>	<i>Resource - Edit General - All</i>	<i>Resource - View - All</i>
<i>Resource - Create</i>	<i>Resource - Enter Time</i>	<i>Resource - View - All</i>
<i>Resource - Edit</i>	<i>Resource - Hard Book</i>	<i>Resource - View - Access Rights</i>
<i>Resource - Edit - All</i>	<i>Resource - Hard Book - All</i>	<i>Resource - View - Financial</i>
<i>Resource - Edit Access Rights</i>	<i>Resource - Navigate</i>	<i>Resource - View Financial - All</i>
<i>Resource - Edit Administration</i>	<i>Resource - Soft Book</i>	
<i>Resource - Edit Financial</i>	<i>Resource - Soft Book - All</i>	
<i>Resource - Edit Financial - All</i>	<i>Resource - Update Skills</i>	
<i>Resource - Edit General</i>	<i>Resource - Update Skills - All</i>	

Create a Resource or a Role

You can create resources or roles of the following types:

Resource 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

Resource Type	Description	Can be Allocated	Has Skills
Expense	Any costs associated with a resource or a role, such as the cost of traveling to a customer site.	Yes	No

Create a Labor Resource

Create a labor resource using both the Home and Administration menus because the resource information is configured from both the administration and application side.

- To create a resource from the application side, open Home, and from Resource Management, click Resources.
- To create a resource from the administration side, open Administration, and from Organization and Access, click Resources.

When you create labor resources on the application side, your CA Clarity PPM administrator must enable the new resources to allow them to log in to the product. The CA Clarity PPM administrator must activate their status and create a password on the administration side.

In this scenario, the system administrator creates resource profiles from the application side and enables the resources from the administration side.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Click New.
3. Accept the default Resource and Resource Type and click Next.
4. Complete the fields in the General section. The following fields require explanation:

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 identifies the area of expertise of the resource.

Example: "Software Development" or "Product Marketing"

External

Specifies whether the resource works for an outside company.

Default: Cleared

Availability

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

Default: 8

Note: This field is mandatory only for the Labor type and not for Equipment, and Material type resources and roles. The value for labor type resources and roles must be greater than zero. Expense type resources and roles do not have availability as they do not have the notion of time (hours or days). ETC is based on availability, and as a result an expense resource or role assigned to a task does not have a default ETC.

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 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 resource currently logged in.

Booking Manager

Indicates the default booking manager for this labor resource.

5. Specify the OBS you want to associate with the resource for the security and organizational purposes in the Organizational Breakdown Structures section.

Department

Defines the financial department and entity associated with the resource. The department belongs to the same entity as the location. Assign a Department OBS to link to a financial entity for financial processing.

Location

Defines the location that is 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.

6. Save your changes.

Create a Non-Labor Resource

A non-labor resource can be created only using the Home menu. Non-labor resources include equipment, material, and 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.

In this scenario, the system administrator creates the following non-labor resources: desktops, laptops, and servers.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Click New.
3. Select Resource in the Resource or Role section.
4. Select the type of resource you want to create.

Values: Equipment, Material, and Expense

Note: In this scenario, select Equipment.

5. Complete the fields in the General section. The following fields require explanation:

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 identifies the area of expertise of the resource.

Example: Projector, server

External

Specifies whether the resource works for an outside company.

Default: Cleared

Availability

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

Default: 8

Note: This field is mandatory only for the Labor type and not for Equipment, and Material type resources and roles. The value for labor type resources and roles must be greater than zero. Expense type resources and roles do not have availability as they do not have the notion of time (hours or days). ETC is based on availability, and as a result an expense resource or role assigned to a task does not have a default ETC.

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 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 resource currently logged in.

Booking Manager

Indicates the default booking manager for this labor resource.

6. Specify the OBS you want to associate with the non-labor resource for the security and organizational purposes in the Organizational Breakdown Structures section.

Department

Defines the financial department and entity associated with the resource. The department belongs to the same entity as the location. Assign a Department OBS to link to a financial entity for financial processing.

Location

Defines the location that is 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.

7. Save your changes.

Create a Role

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 labor and non-labor roles from the application side based on your requirements. Though some of the fields vary depending on the resource type you select, the overall steps for creating each type of role are the same.

In this scenario, the system administrator creates the following labor roles: associate developer, associate quality engineer, and associate information engineer.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Click New.
3. Select Role in the Resource or Role section.

4. Select the Resource Type and click Next.

Default: Labor

Note: You can use other resource types to create a role. In this scenario, select Labor.

5. Complete the fields in the General section. The following fields require explanation:

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 that identifies the 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.

Default: 8

Note: This field is mandatory only for the Labor type and not for Equipment, and Material type resources and roles. The value for labor type resources and roles must be greater than zero. Expense type resources and roles do not have availability as they do not have the notion of time (hours or days). ETC is based on availability, and as a result an expense resource or role assigned to a task does not have a default ETC.

Booking Manager

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

6. Specify the OBS you want to associate with the role for the security and organizational purposes in the Organizational Breakdown Structure section.

Department

Defines the financial department and entity associated with the resource. The department belongs to the same entity as the location. Assign a Department OBS to link to a financial entity for financial processing.

Location

Defines the location that is 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.

7. Save your changes.

Define Resource and Role Properties

The properties tab becomes available after you save the resource or role that you created. This tab displays the profile information that you entered when creating the resource or role. You can edit the fields, and can also manage the resources, groups, and OBS units assigned access to the resource or role. Use the subpages to:

- [Add resource contact information](#) (see page 21)
- [Enable financial properties](#) (see page 21)

Add Resource Contact Information

You can add contact information only for a labor resource. This information is available to anyone who has access to the resource.

Follow these steps:

1. With the resource open, click Properties.
2. Open the Properties menu, and click Contact Information from Main.
3. Complete the fields and save your changes.

Enable the Financial Properties

Use the Financial subpage to capture all the information needed to track financial time for a resource or role on a project. The application uses the financial properties of the resource to apply the correct rates and costs to the transactions as they are processed. Enable the resource or role to specify that the role or resource is active financially. Enable the financial transactions for a resource to post to CA Clarity PPM and display on the applications financial pages and reports. The financial actuals are visible in the product only if a resource is financially enabled.

To enable financial attributes, you must have these access rights:

Task	Access Right ¹
Edit financial attributes for a specific resource or role.	One of the following rights: ■ <i>Resource - Edit</i> ■ <i>Resource - Edit Financial</i>
Edit financial attributes for all resources and roles.	One of the following rights: ■ <i>Resource - Edit - All</i> ■ <i>Resource - Edit Financial - All</i>

These access rights require the *Resource - Navigate* access right.

Enable the Resource Financially

You can financially enable any resource that is involved with financial transactions or works with any financial features, including financial planning and forecasting.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Open the resource.
3. Open the Properties menu, and click Financial from Properties.
4. Complete the fields in the Supplemental section. 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

Signifies user-defined values that group transaction types for the resource and is used with financial processing.

Resource Class

Categorizes financially enabled resources and is 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. Complete the fields in the Rates and Costs section. The following field requires explanation:

Target % Billable

Refers to the percentage of the targeted billing rate that is billable. Enter the target percentage billable for this resource, if applicable.

6. Complete the fields in the Expenses section.
7. Save your changes.

Enable the Role Financially

You can enable the financial attributes for any type of role that is involved with financial management.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Open the role.
3. Open the Properties menu, and click Financial from Properties.
4. Complete the fields in the Supplemental section. 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

Signifies user-defined values that group transaction types for the role and is used with financial processing.

Resource Class

Categorizes financially enabled roles and is used with financial processing.

5. Save your changes.

Add Skills Associated with Labor Resource

You can use skills to describe the talent a resource or role requires to complete the tasks. Use the skills tab to perform the following actions:

- [Associate skills with labor resources](#) (see page 23).
- [Assign skill proficiency and interest levels](#) (see page 24).
- View the list of associated skills.

Associate Skills with Labor Resources

You can associate a skill only with a labor resource to which you have access. Associating the skills with labor resources can be helpful for those trying to match labor resources to roles and projects.

Follow these steps:

1. With the labor resource open, click Skills.
2. Click Add.
3. Select the skills to add, and click Add.

Assign Skill Proficiency and Interest Levels

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. Proficiency indicates how well a resource performs the skill. Interest indicates how important this skill is to the resource. Weighting is used as a tiebreaker if there are multiple skills that have the same proficiency and interest.

The three proficiency levels are Beginner, Advanced, and Expert. 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.

As a resource gains more expertise in a particular skill, the manager or whoever is responsible for updating the data, modifies the skill to reflect the appropriate level or proficiency and interest.

Interest rating works the same way. The product 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.
2. Select Proficiency Level, Interest, and Weighting value for each skill.
3. Save your changes.

After you save the changes, you can view the resources and roles you created both from the application and administration side.

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.

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.

For more information, see the *Project Management User Guide*.

Edit a Resource or Role Allocation

You can edit a resource or role allocation using the Summary and Detail subtabs in the Allocation tab.

- Summary

Displays the allocation information for a resource allocated to an investment. Use this subtab to view and edit booking status, and allocation information for each investment to which the resource or role is allocated.

- Detail

Displays the allocation information for a role that is allocated to an investment. Use this subtab to view and edit allocation information for each investment by week in a histogram format.

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.

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

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 allocated 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 manager can then adjust task assignments and the schedule for the investment, if necessary.

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.

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.

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.
2. Select the investment whose allocations you want to shift.
3. Select Shift Allocation from the Actions menu.
4. 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.

5. Save your changes.

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.

For example, 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.

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

For more information, see the *Project Management User Guide*.

Follow these steps:

1. With the resource open, click Allocations.
2. Click the Properties icon on the Summary or Detail page for the investment for which you want to edit resource allocation.
3. Change the following field in the General section. The following field requires explanation:

Default % Allocation

Defines the percentage of time you want to allocate the resource to a project. You can enter "0" (zero). The change you make here reflects in the Allocation and Allocation % columns on the resource/role allocations page or project team staff page.

4. Create rows for deviations in the Planned Allocation and Hard Allocation sections.

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% (compared to the 100% default or planned allocation); and
 - Second row. For the period where the resource actually works at 0% (compared to the 100% default or planned allocation).
5. Complete the fields to create a planned or hard allocation curve in the Planned Allocation and Hard Allocation sections. The following field requires explanation:

% 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. Save your changes.

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.

For more information, see the *Project Management User Guide*.

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.

For more information, see the *Project Management User Guide*.

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.

For more information, see the *Project Management User Guide*.

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.

For more information, see the *Project Management User Guide*.

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).

For more information, see the *Project Management User Guide*.

Follow these steps:

1. With the resource open, click Allocations.
2. Click the Resource Finder icon next to the investment to replace the resource.
3. Enter filter values to narrow the resource list, or click Show All to view all resources.
4. Select one or more resources to replace the previous resource, and click Replace.
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. Use edit resource calendar page to view or add working days, non-working days, and shifts to the calendar for the resource, if you have identified such information. You can change calendar information for a resource to which you have the Resource - Edit access right.

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

For more information, see the *Administration Guide*.

Edit Resource and Role Properties and Associations

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.

Follow these steps:

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 45)

[Manage Automated Requisition Processes](#) (see page 48)

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, you 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.

For more information, see the *Project Management User Guide*.

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.
2. Click a resource name to open the resource properties.
3. Specify the booking manager for the resource in the General section.
4. Save your changes.

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."

For more information, see the *Project Management User Guide*.

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:

Requisition Status Changes	Requested By	Booking Manager
Created		
From New to Open		Notified
From Open to New		Notified
From Open to Propose	Notified	
From Proposed to Booked	Notified	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.

For more information, see the *Basics User Guide*.

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.

For more information, see the *Basics User Guide*.

Manage Resource Requisitions

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.
2. Click the requisition link to open the requisition and edit. 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. 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.
2. Click the Person with List icon next to a requisition to access that requisition.
3. Click Propose to propose the resource back to the project manager for the requested time and allocation amount.

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.
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.

If...	Then...
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.
2. Click the link for that requisition.
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.

For more information, see the *Project Management User Guide*.

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.
2. Click the name of the resource requisition.
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.
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.
2. Click Propose on the Resources page.

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.
2. Click the requisition link.
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.
2. Click the link for that requisition.
3. Set the status to "Closed", and click Save and Return.

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

For more information, see the *Basics User Guide*.

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.
2. To expand the message and read its contents, do one of the following:
 - Click Expand.
 - Click the Message icon.

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

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.

For more information, see the *Administration Guide*.

Follow these steps:

1. Open the requisition.
2. Click Processes.
3. Click Available from the toolbar.
4. Click New.

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.

For more information, see the *Administration Guide*.

Delete Processes

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

Follow these steps:

1. Select the check box next to the process.
2. Click Delete.
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.
2. Click Audit.
3. Filter the list.

The audit fields for the requisition display.

Chapter 4: Resource Planning

This section contains the following topics:

[Overview](#) (see page 51)

[Resource Planning Portlets](#) (see page 53)

Overview

Use the Resource Planning portlet to monitor and compare resource allocations, check availability of resource time, remaining work for a resource, and actuals. The following list defines these terms:

Availability

Defines the number of hours that a resource is available for work or is expected to work in one business day.

Default Value: 8

You can calculate weekly availability using the following equation:

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 eight and the number of business days per week in the assigned resource calendar is five,

Weekly availability = $8 \times 5 = 40$ hours per week

Allocation

Defined as booking a resource as a staff member to an investment. An allocation amount is generated for each resource. You can calculate resource allocation using the following equation:

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.

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.

Use the Resource Planning portlet 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	This page lists 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.	■ Role Capacity Histogram ■ Role Capacity
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.	■ OBS Resource Aggregation ■ OBS Investment Aggregation
Top Down Planning	This page lists investments and the resources and roles that are allocated to each investment.	■ Top Down Planning by Investment
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.	■ Resource Workloads
Allocations	This page provides several options to view and edit resource allocations on individual investments.	■ Weekly Detail ■ Allocation Discrepancy
Unfilled Allocations	This page provides a list of roles that are booked to all investments and displays unfilled demand across your organization.	■ Unfilled Requirements

Resource Planning Page	Description	Portlets
Bookings	This page provides a list of resources with information about their booking status for all investments.	■ Booking Status

You can view the following information from the portlets:

- Properties for a resource or role.
- Role allocation over multiple investments using the Resource Allocation icon.
- Monthly allocation for resources in the OBS unit using the Resources icon. 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)
- Monthly allocation for roles in the OBS unit using the Roles icon.
- Individual role or resource allocations from the OBS Roles or OBS Resources portlets using the drill down links.
- Aggregated demand data for each investment assigned to the OBS unit using the Investments icon.
- Locate a replacement for a resource or to replace a role with a named resource using the Resource Finder icon.
- View and edit resource and role team data for an investment by clicking the investment name.
- Open the Staff Member Properties page for the investment using the Properties icon.
- Change the allocation value.
- Send an email using the Envelope icon.

Note: Click inside an allocation cell to change the allocation value for a resource or role.

Role Capacity Histogram Portlet

Portlet Properties

Portlet ID: projmgr.roleCapacityHistogram

System Provider: Roles with Resource Allocation

Description

The Role Capacity Histogram portlet displays the 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 displayed 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.

Role Capacity Portlet

Portlet Properties

Portlet ID: projmgr.roleCapacity

System Provider: Roles with Resource Allocation

Description

The Role Capacity portlet displays the 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.

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. Allocation for each resource appears in terms of a full-time equivalent (FTE).

FTE is measured as follows:

- 1.00 FTE = Full-time allocation (100 percent)
- 1.50 FTE = Over allocation (150 percent)
- 0.50 FTE = Half-time allocation (50 percent)

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.

OBS Investment Aggregation Portlet

Portlet Properties

Portlet ID: projmgr.OBSInvestmentAggregation

System Provider: OBS Investment Aggregation

Description

The OBS Investment Aggregation portlet displays 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.

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.

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.

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.

Allocation Discrepancy Portlet

Portlet Properties

Portlet ID: projmgr.allocationDiscrepancy

System Provider: Actuals vs Allocation Discrepancy

Description

This portlet displays the difference between allocated hours for a resource and the actual hours that the resource is 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.

Unfilled Requirements Portlet

Portlet Properties

Portlet ID: projmgr.unfilledAllocations

System Provider: Team Allocations

Description

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

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.

Chapter 5: Capacity Overview

This section contains the following topics:

[Capacity Overview Portlet](#) (see page 59)

[Drill-Down Portlets](#) (see page 62)

Capacity Overview Portlet

You can use the Capacity Overview portlet to get an aggregated view of the capacity available, demand requested, remaining capacity, and the actual hours provided by any given unit in the organization from a Resource OBS hierarchical view. The information on this portlet is rolled up to the Resource OBS unit selected in the Filter section. You can expand the OBS to get more insight into the information for the descendants.

The portlet data is generated in the following way:

- For the *allocation data*, the product checks all the investments in the system, their teams, and their team members to verify if the Staff OBS unit of the resource matches the filter criteria. The allocations of all the matched resources sum up to the data that appears on the portlets. If the Staff OBS unit is blank, the Resource OBS unit is checked for any matches.
- For the *capacity data*, the product checks all the named resources regardless of whether they are allocated to any investment or not to verify if the Resource OBS unit matches the filter criteria. If there are matches, the availability of the matched resources sums up to the data that appears on the portlets.

Important! Verify that you run the Datamart Extraction job successfully to help ensure that the filtered information appears on the portlets.

Example: View capacity and demand for a Resource OBS unit

Forward, Inc. uses its reporting relationships to model one of its Resource OBS units. Mary has a team of direct reports and indirect employees who report to her direct reports. As a manager, Mary wants to understand the total investment demand for resources in the organization, including allocated staff and unfilled roles.

Mary can navigate to the Capacity Overview portlet and can set the filter criteria to get a consolidated view of the capacity and demand.

The following list defines the terms on the portlet:

Capacity

Capacity is the total time that a named resource makes available to the organization and is also known as *aggregated availability*. Capacity includes only the named resources that belong to a Resource OBS or descendant OBS and does not include roles. Some of the capacity examples are as follows:

- A person contracted to work 40 hours each week has a capacity of 40 hours.
- Mary has a team of three direct reports that work 40 hours each week. The capacity for her organizational unit for any given week is 120 hours.

Note: Mary is not included in the team capacity.

- Mary has down-line staff that report into her direct reports. The total capacity for her organization is the aggregate capacity of all the organizations that report into her.

Allocation

Allocation, also known as *Demand*, is the total time that is requested on a resource or role in the organization. Demand is based on the planned allocation for team members who are allocated to an investment. Demand includes allocations for both named staff and requested roles of an organizational unit and consists of hard-booked and soft-booked time. Regardless of the system setting, only planned allocation hours are counted towards Demand.

Some of the allocation examples are as follows and in these examples, John, Bill, and Sue are the direct reports of Mary:

- John is hard-booked for 20 hours next week to project A, and soft-booked 10 hours to project B. The total demand for John next week is 30 hours.
- Bill is hard-booked for 40 hours next week to project A, and is mixed-booked for 20 hours to project B. The total demand for Bill next week is 60 hours.
- Sue is not allocated to any project. The demand for Sue is 0 hours.
- A role is designated and soft-booked for 35 hours next week to project A. In the role properties for that project, Mary's team is designated as the Staff OBS unit. The demand for that role for Mary's team is 35 hours next week.
- The total allocation or demand next week for the resources in Mary's organization is 125 hours: 60 hours hard-booked staff, 30 hours soft-booked staff, and 35 hours soft-booked unfilled roles.

Hard-booked Staff

Represents named resources with hard booking status and it does not include metrics for roles. A team staff member with Booking Status set to Hard means hard allocation and planned allocations are the same.

Soft-booked Staff

Represents named resources with soft or mixed booking status and it does not include metrics for roles. A team staff member who is soft-booked has only planned allocations and no hard allocations. A team member is mixed-booked when the planned allocation and hard allocation are not equal.

In this portlet, mixed status is reported as soft-booked staff. A resource is mixed-booked when there is a change in the way the resource is planned to be allocated.

Note: The mixed booking status requires Allow Mixed Booking to be enabled in the Project Management Settings (Administrator Tool). The Allow Mixed Bookings setting helps to manage the planned allocation and hard allocation separately.

Unfilled Roles

Represents all roles and their allocation based on the filtering criteria for the booking status. Roles can be allocated to a project or an investment with hard, soft, and mixed booking status and planned or hard allocations.

Capacity – Allocation

Remaining Capacity is the difference between Capacity and Allocation. The Remaining Capacity is the total time that any organization has available to work on projects and is not already booked or requested of that unit.

If the Remaining Capacity is negative, the investment is over-allocated and if it is positive, the investment is under-allocated.

Actuals

Actuals are the total number of hours logged by the staff reporting in to an organizational unit. The Actuals field on this portlet displays the total number of hours logged by named resources for all the investments that belong to the Resource OBS selected in the filter section. Actuals are work units and not cost.

For example, if the team members logged a total of 139 hours to various projects, the total actuals for the team are 139 hours.

Drill-Down Portlets

Use the drill-down icons on the Capacity Overview portlet to view the details of the aggregated data for the Resource OBS. The information in the drill-down portlets corresponds to the data that appears on the Capacity Overview portlet. The values selected in the Resource OBS and List Mode are the focal point for the data that appears on the main and the drill-down portlets.

The drill-down portlets provide default values for their filter criteria based on the node from which you click to drill down. Each of the following drill-down icons represents a different set of information:

- [Staff Allocation Overview Portlet](#) (see page 62)
- [Unfilled Roles Portlet](#) (see page 62)
- [Investment Demand Portlet](#) (see page 63)

The following actions happen when you click the icons to open the drill-down portlets:

- The filter section is collapsed for the drill-down portlets.
- All the values present in the filter section of the main portlet are passed to the corresponding filter fields on the drill-down portlets.
- By default, the Work Effort unit for the main portlet is FTE which is configurable. The drill-down portlets have the same Work Effort unit that is configured on the main portlet.

Staff Allocation Overview Portlet

The Staff Allocation Overview portlet displays the allocation data for the named resources that are assigned to the Resource OBS selected in the filter. The allocation is blank for resources that are associated with the Resource OBS but are not allocated to any projects. You can further refine the search results on the Staff Allocation Overview portlet.

Unfilled Roles Portlet

The Unfilled Roles portlet represents all unfilled roles and their allocation based on the filtering criteria for the booking status. Each row corresponds to an unfilled role in an investment.

Investment Demand Portlet

The Investment Demand portlet displays a list of investments with the allocation data for named resources and roles. Each row on this portlet corresponds to an investment with the staff members of the selected OBS.

Chapter 6: 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.

For more information, see the *Project Management User Guide*.

- 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 investments 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 7: 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.

For more information, see the *Basics User Guide*.

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