

CA Clarity™ PPM

Resource Management User Guide

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Chapter 1: How to Get Started with Resource Management

This section contains the following topics:

[Resource Management: Introduction](#) (see page 7)

[Resource Management: Prerequisites](#) (see page 8)

Resource Management: Introduction

Allocating the appropriate resources to the right project teams is essential to effective resource management. CA Clarity PPM provides a flexible framework in which you can perform and monitor the following resource management activities:

- Create and edit resource profiles with important details such as:
 - employee type
 - primary role
 - skills
 - experience
- View, edit, and track resource project allocations and workloads.
- Compare resource capacity with resource demand.
- Locate resources with specific characteristics, by availability, and more.

As a resource manager, you manage the assignments of employees, contractors, and nonlabor assets. Resource managers can be temporary project leaders or full-time department heads. Project managers often use Resource Management features, such as creating requisitions and finding resources.

Resource Management: Prerequisites

As a resource manager, complete the prerequisites in the following checklist:

- ☐ Verify with your administrator that scheduled jobs are running properly.
- ☐ If any data fails to display in the expected ways on a page or in a report, contact your administrator.

Note: The failure of certain jobs can affect the appearance of your data. For example, the Time Slicing job can affect the resource management data or the performance of the application. When the Time Slicing job fails to run, time-sliced data shown on resource planning pages cannot display properly.

- ☐ To enable financial properties for resources and roles, verify that you have the following access right:
 - *Resource - Navigate*
- ☐ To edit financial attributes for a specific resource or role, verify that you have one of the following access rights:
 - *Resource - Edit*
 - *Resource - Edit Financial*
- ☐ To edit financial attributes for all resources and roles, verify that you have one of the following access rights:
 - *Resource - Edit - All*
 - *Resource - Edit Financial - All*
- ☐ Verify with your administrator that you have the access rights to create, view, or edit resource properties. Refer to the Access Rights Reference Guide to configure the required rights.
- ☐ Verify with your administrator that you have the following access rights to work with capacity planning scenarios:
 - *Scenario - Edit*
 - *Scenario - Edit Access Rights*
 - *Scenario - Manager - Automatic*
 - *Scenario - Navigate*
 - *Scenario - View*

Note: Capacity planning scenarios are designed for you to view a subset of all resources or investments. As a best practice, limit resources or investments through a security OBS or through instance-level resource access rights. A more manageable amount of data appears for the 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.

- Verify with your administrator that you have the following rights to manage requisitions:
 - Project - Attach Requisitions Resources
 - Project - Create/Edit Requisitions
 - Project - View Requisitions
 - Process - Create Definition
 - Process - Initiate

Chapter 2: How to Create Resources and Roles

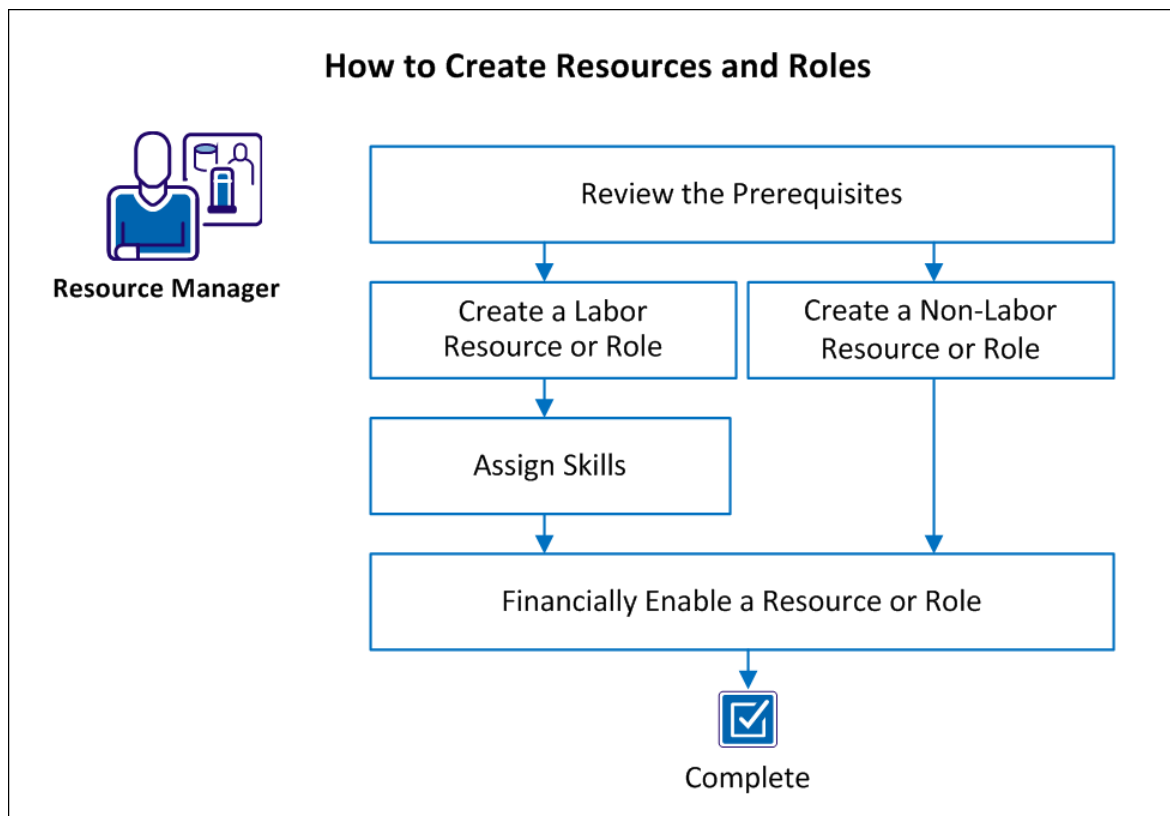
How to Create Resources and Roles

As a resource manager or application administrator, create roles first as placeholders for the resources that your projects require. Then, create the resources that you hire to fill the demand that is recognized by role allocations. Finally, assign your resources to the right project teams.

For example, create a role for a field technician and then create resources for your staff and contractors. You can create an advanced role for a lead field technician with more skills. Create a non-labor equipment role whenever a project requires machinery. Then create resources for each available machine that your company owns or leases.

The product uses the financial properties of the resource to apply the correct rates and costs to their work transactions as they are processed. Enable the financial transactions for a resource to post to CA Clarity PPM and appear in financial pages and reports. The financial actuals are visible in the product only if a resource is financially enabled.

The following graphic shows the primary steps for creating resources and roles.



Follow these steps:

1. [Review the Prerequisites](#) (see page 14).
2. [Create a Labor Resource or Role](#) (see page 15) or [Create a Non-Labor Resource or Role](#) (see page 17).
3. [Assign Skills](#) (see page 18) (Labor Only)
4. [Financially Enable a Resource or Role](#) (see page 19)

Review the Prerequisites

Verify that you have satisfied the following prerequisites:

- ☐ Configure the skills hierarchy.
- ☐ Verify that you have all of the following access rights:
 - Administration - Resources
 - Resource - Create
 - Resource - Edit
 - Resource - Edit - All
 - Resource - Edit Access Rights
 - Resource - Edit Administration
 - Resource - Edit Financial
 - Resource - Edit Financial - All
 - Resource - Edit General
 - Resource - Edit General - All
 - Resource - Enter Time
 - Resource - Hard Book
 - Resource - Hard Book - All
 - Resource - Navigate
 - Resource - Soft Book
 - Resource - Soft Book - All
 - Resource - Update Skills
 - Resource - Update Skills - All
 - Resource - View
 - Resource - View - All
 - Resource - View - Access Rights
 - Resource - View - Financial
 - Resource - View Financial - All

Create a Labor Resource or Role

You can create a labor resource using either the Home or Administration menus. When you create labor resources from the Home menu, your administrator must activate the new resources. The administrator activates their status and creates a password for login.

Note: In this scenario, the resource manager creates resources from the Home menu. The administrator activates the resources from the Administration menu. As an administrator, to create and activate a resource, open the Administration menu, and from Organization and Access, click Resources.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Click New.
3. In the Resource or Role field, select *Resource*.
4. In the Resource Type field, select *Labor*.
5. Click Next.
6. Complete the Create Resource-Labor page including the following fields:

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 and must be greater than zero only for the Labor type of resource or role. ETC is based on availability. An expense type of resource or role that is 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 use timesheets to track time that is spent on task assignments. 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.

7. Click Save.
8. To define the resource or role availability, click the Calendar tab.
9. (Optional) Click the Properties tab, and click Contact Information. Complete the fields and save your changes.

Create a Non-Labor Resource or Role

You can create non-labor resources and roles including equipment, material, or expense. Create a role as a placeholder in a project to help you plan for tasks and estimate the scope of work.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Click New.
3. In the Resource or Role field, select *Resource* or *Role*.
4. In the Resource Type field, select *Equipment*, *Material*, or *Expense*.
5. Click Next.
6. Complete the page including the following fields:

Parent Role

Specifies the role one-level higher than this role in a hierarchy.

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

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 and must be greater than zero only for the Labor type of resource or role. ETC is based on availability. An expense type of resource or role that is assigned to a task does not have a default ETC.

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.

7. Click Save.
8. To define the resource or role availability, click the Calendar tab.
9. (Optional) Click the Properties menu, and under Main, click Financial. Complete the fields and save your changes.
10. (Optional) For labor and expense resources only, click the Properties menu, and under Main, click Contact Information. Complete the fields and save your changes.

Assign Skills (Labor Only)

You can use skills to describe the talents a labor resource or role possesses for project tasks. You can associate a skill only with a labor resource. Associating the skills with labor resources is helpful for other users who are matching labor resources to roles on projects.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Open a resource or role.
3. Click the Skills tab.

The Resource Skills page appears showing the skills for the selected resource or role.

4. Enter filter criteria for an existing skill or click Show All.
5. To add a skill to the list, click Add.

The Select Skills page appears showing all of the skills available in the skills hierarchy for all resources and roles.

6. Enter filter criteria for an existing skill or click Show All.
7. Select a skill and click Add.

Note: To add a skill to the skills hierarchy, contact your administrator.

8. Click Save.
9. For each skill, select values for the Proficiency Level, Interest, and Weighting fields.
 - a. Assign proficiency levels for labor resources as a rating that indicates how well the resource performs the skill.
 - b. Assign an interest level to indicate how important this skill is for the resource or role. 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.
 - c. Use the weighting factor as a tiebreaker if there are multiple skills that have the same proficiency and interest.
10. Click Save.

Financially Enable a Resource or Role

You can financially enable any resource or role that is involved with financial transactions. Enabling the resource or role includes associated financial data in features such as financial planning and forecasting.

Follow these steps:

1. Open Home, and from Resource Management, click Resources.
2. Open the resource or role.
3. Click the Properties tab and select Financial under Main.
4. Complete the Supplemental section including the following fields:

Financially Active

Indicates whether the financial attributes for a resource or role are enabled to record financial management activities against an investment.

Transaction Class

Specifies a user-defined value that groups transaction types for financial processing of the resource or role.

Resource Class

Categorizes financially enabled resources and roles for financial processing.

If the resource or role type is *labor*, complete the Financial Department and Financial Location fields to be able to mark the resource as financially active.

5. For resources only:
 - a. Complete the Rates and Costs section including the following fields:

Target % Billable

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

- b. Complete the fields in the Expenses section.
6. Save your changes.

Chapter 3: How to Find, Book, and Allocate Resources

This section contains the following topics:

- [Find and Book Labor Resources](#) (see page 21)
- [Resource and Role Allocations](#) (see page 23)
- [Add Investments to Resource Workloads](#) (see page 24)
- [Change Default Allocation](#) (see page 24)
- [Edit Investment Allocations](#) (see page 26)
- [Shift a Resource Allocation](#) (see page 27)
- [Remove Investments from Resource Workloads](#) (see page 28)
- [Replace Resources on Investments](#) (see page 28)
- [Calendar Associations](#) (see page 30)
- [Deactivate a Resource or Role Profile](#) (see page 30)

Find and Book Labor Resources

As a Resource Manager, use the information in this article to identify and manage resource assignments.

You can use the Resource Finder to select available labor resources and book them to the right investments. A secondary use is to capture a snapshot or inventory of your labor resources that share certain attributes. You can use the Resource Finder to identify labor resources by filter criteria such as:

- employment status (employees or contractors)
- OBS
- primary role
- calendar availability
- skills

For example, identify all employees with a specific certified skill in a specific technical role.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Finder.
2. Click Expand Filter.

3. Click Clear or Show All to remove any existing filter criteria.
4. Define your filter criteria including any of the following fields:

OBS Unit

Specifies the OBS for the labor resources.

OBS Unit - Filter Mode

Specifies a limited search on the exact OBS unit or a wider search that includes OBS unit descendants or ancestors.

Role

Searches by role.

Filter Mode

Specifies a limited search on the exact role or a wider search that includes role descendants or ancestors..

Availability

Specifies the required availability of matching resources in one or more date ranges by percent, hours, days, or FTE.

Availability Threshold

Indicates the minimum required availability. For example, resources with less than 10 percent availability can be over-allocated or over-booked. Resources that match a 90 percent availability threshold are more readily available for a new project or task assignment.

Include Soft-booked Resources

Indicates whether to include resources that are available but that have already been soft-booked for an investment. When you clear the check box, the filter excludes soft-booked resources from appearing in the results.

Skills

Identifies resources that match the assigned skills from the skills hierarchy.

Skills Threshold

Works with the Skills 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 where you can build a custom filter. Create custom searches that are tailored to meet the more specific recruiting requirements.

5. Click Filter.
6. Select one or more resources and click Book.
7. Select an investment and click Book.

Resource and Role Allocations

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

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. The changes you make from the resource/ role allocation pages appear on the team staff page for the investment.

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 allocations. 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.

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.

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

Add Investments to Resource Workloads

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

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.

Follow these steps:

1. With the resource open, click Allocations.
2. Click Add.
3. Select the investment for the resource and click Add.

The investment is added to the workload for the resource.

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.
 - **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.
3. Change the following field in the General section:

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.

To apply the previous example, 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.

Edit Investment Allocations

The allocations detail page displays resource and role allocations by investment and week in a histogram. Investments appear in rows and allocations appear in columns by week. Use this page to edit weekly allocations for a resource by investment.

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.
4. Confirm the changes in the Aggregation section at the bottom of the page.
 - The red bar indicates the months in which the role is overbooked.
 - The yellow bar indicates that no over allocations appear in that period.
5. Save your changes.

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.

Remove Investments from Resource Workloads

You can 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.

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

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

You can replace a resource on a project. Use this procedure to generate a list of resources who share the same role and are available during the time of the investment. The following rules apply:

- 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).
- 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.

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. Examine the following fields:

Availability

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.

Availability Match

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.

5. The following message can appear 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, the dates in the Availability field are 9/1/15 - 2/7/16 and the date range in the message is 9/7/15 - 9/7/15. A one-to-one comparison for any resource does not exist and this condition lowers the overall availability match scores.

6. Select one or more resources to replace the previous resource, and click Replace.
7. 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.

8. 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.

Select one of the following values:

- *Overallocate* to over-allocate the resource.
- *Remaining Only* to book the resource for the amount listed in the Remaining Availability column.

Calendar Associations

You can review the calendar for a resource to determine their availability for various assignments.

Follow these steps:

1. Open the resource.
2. Click the Calendar tab.
3. Change calendar information for a resource. For example, add working days, non-working days, and shifts to the calendar.

Note: The *Resource - Edit* access right is required.

Deactivate a Resource or Role Profile

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 appear 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 4: How to Work with Resource Requisitions

This section contains the following topics:

- [Resource Requisitions](#) (see page 32)
- [Manage Resource Requisitions](#) (see page 32)
- [Set a Default Booking Manager for Resources](#) (see page 33)
- [Requisition Routing and Notification](#) (see page 34)
- [Types of Requisition Status](#) (see page 35)
- [Fulfill Resource Requisitions](#) (see page 37)
- [Reduce Resource Allocations](#) (see page 38)
- [Unbook a Requisition](#) (see page 39)
- [Find Resources to Fulfill Role Requests](#) (see page 42)
- [Modify and Resubmit Proposals](#) (see page 43)
- [Decline an Open Resource Requisition](#) (see page 43)
- [Participate in Requisition Discussions](#) (see page 44)
- [Manage an Automated Requisition Process](#) (see page 45)
- [Audit Requisitions](#) (see page 46)

Resource 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.

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.

Manage Resource Requisitions

As a resource manager, you can view, propose, and book requisitions.

Note: You can also receive notifications for each requisition assigned to you. Email notifications and notifications on your home page include a link to the Requisition Properties page. You can also use the Project Requisitions page to view requisitions.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.
2. 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. Enter your search criteria in the Filter portion of the page and click Filter.
3. Click the requisition link to open the requisition and edit it. 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.

4. Depending on your access rights, you can change any of the fields available on any of the tabs.
5. Click Save and Return to save your changes and return to the Resource Requisitions page.

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 logic:

- 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.
- Users with appropriate access rights can view the requisition in their list 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.

The following table shows the parties that are 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

Requisition Status Changes	Requested By	Booking Manager
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		

Notes:

- As a user, you can determine your requisition notification format, message layout, and delivery method from the Account Settings: Notifications page.
- As an administrator, 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.

Types of Requisition Status

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*). Other recipients can then change the status.

New

All requisitions begin with this 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*.

Open

This status indicates that the requisition is active and requires attention and fulfillment. The requestor who creates the requisition is the one who changes the status to *Open*. The booking manager is notified.

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 back to *Open*.

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.

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. Only the requestor can close a requisition. If the booking manager declines an open requisition, the requisition status automatically changes to Closed.

Fulfill 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.

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.

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".

4. To address multiple named requests:
 - a. Select the list of named resources and click Propose to propose the allocations to the project manager.
 - b. Edit the allocation amounts for the requested named resources directly in the grid.
 - c. Select the list of named resources and click Propose to propose the allocations to the project manager.

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

5. Confirm the changes in the resource histogram that displays 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 part shows where the resource is over-allocated.
6. If the Requisition Approval Required option for the project is turned off (no project manager approval required):
 - The Book button appears 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 you do not have the Project – Edit access right, the Propose button appears 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 appear on the page.

Reduce Resource Allocations

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

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.

You can also use this procedure from an open resource:

Follow these steps:

1. Click the Properties icon to the left of the resource name.
2. Edit existing allocation segments, and add any new ones.
3. Click Save and Return.

Unbook a Requisition

Administrators, project managers, and resource managers work together to unbook resource requisitions.

- As a project manager, sometimes you reduce the scope of a project or a resource is unavailable for a particular period. You can unbook hard-booked resources to use their unbooked time on another project. You can unbook a resource completely or partially from projects. Unbooking a resource removes any 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.
- As a resource manager, work with the project manager to confirm resource booking and unbooking. Remind project managers that they cannot unbook a role or a soft-booked staffing requirement.
- As an administrator, you configure the application to support your users. Managers can unbook only if you enable the Allow Mixed Booking setting. Mixed bookings support differences between planned and hard allocations. Unbooking a resource resets the hard allocation to match the planned allocation. For example, a manager sets a hard allocation to 10 weeks, and then changes the planned allocation to 8 weeks. The Unbook Resources operation removes two weeks of hard allocation.

Follow these steps:

1. As an Administrator:
 - a. Open the Administration menu and under Project Management select Settings.
 - b. Select the Allow Mixed Booking check box and click Save.
2. As a Project Manager:
 - a. Open Home and from Portfolio Management, click Projects.
 - b. Open a project and click the Team tab.
 - c. Select the check box for one or more mixed or hard-booked resources.
 - d. Click the Actions menu and select Create Requisitions.
 - e. Select Unbook Resources as a Requisition Type.
 - f. Select a booking manager for each resource. The default booking manager automatically appears.
 - g. Click Create to create requisitions with a *New* status or click Create and Open to create an *Open* requisition.

The requisition is created and displays on the team staff page of the project. If a requisition contains a request to unbook a specific resource, you see a checkmark in the Unbook column.
 - h. Save the changes.
3. As a Resource Manager:

- a. Open Home, and from Resource Management, click Resource Requisitions.

If a requisition contains a request to unbook a specific resource, you see a check mark in the Unbook column.

- b. Select the check box for one or more resources with a check mark in the Unbook column and click Book.

The application removes all hard allocations that are no longer in the plan from today forward. On the Resource Requisitions page, the hard-booked allocation amount changes in the Average Rate column. If a resource is unbooked fully, the value displays as 0.00 percent.

- c. Click the link for that requisition.

The Requisition Properties page displays the following text:

This requisition is for unbooking purposes only.

- d. A requisition to unbook and replace a resource selects both the Unbook and Replace check boxes on the Requisition Properties page. The Resources menu also appears.
 - Click Resources to set appropriate filtering criteria.
 - Add a new resource to match the availability of the replaced resource.
 - If you have the required access rights, the Replace button appears. Click Replace to replace the unbooked resource with the new resource.
 - If you do not have the required access rights, the project manager can review the proposed replacement and then book that resource.

Resource Requisition Rules

The product applies the following rules when you unbook resource requisitions:

- The planned allocation curve represents the default or total allocation amount that the service manager requests for. The hard allocation curve represents the allocation amount that the resource manager commits. The booking status for a resource changes according to the allocation amounts in the planned and hard allocation curves.
- When you unbook resources, the application reduces the amount of committed or *hard* allocation that exceeds the *planned* allocation. The resulting unbook requisition subtracts from the hard allocation curve.
- When you select the Replace Resources requisition type, the Unbook feature on the requisition is automatically checked. The application generates a requisition with two new properties (unbook = true and replace = true).
- The unbook amount defaults to the hard allocation of the team member minus the total allocation. If the total allocation equals or exceeds the hard allocation, the unbook amount is zero.
- The unbook amount defaults to unbookings from today forward. You can adjust the date and the requisition amount to only partially unbook.
- For a straight unbook (replace option is off) the application does not display a Resource tab. Instead of a propose option, you can unbook or decline. When you unbook, the team member allocation is decremented without project manager approval. When you decline, the team member allocation is not decremented. In both cases, notification is sent to the project manager and the requisition status is set to *booked*.

Note: If you have booking rights, you can zero out the team member's hard allocation without submitting a requisition.

- For a replacement unbook, the Resource tab appears. The requested amount is equal to the total allocation of the team members that you are unbooking. The team member being unbooked does not appear in the resource list. The unbooking is an attribute of the requisition. You can fill the requisition exactly as you would fill any standard requisition with options for proposed, preferred, accept, and reject. In addition to the booking, the application also performs the unbooking.

Find Resources to Fulfill Role Requests

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 is divided among the resources. For example, if one resource is required for a week, propose two resources as follows:

- Resource 1 from Monday to Wednesday
- Resource 2 from Thursday to Friday.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.
2. Click the name of the resource requisition and then click Resources, or click the Person with List icon next to the requisition.
3. Click Add.

The information that appears on the Find Resources page is based on the requirements that were specified in the staffing request. You can modify the search criteria to find more eligible resources.

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

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

5. Select the desired candidate and click Add.

The Requisition Resources page appears with the Resources page active.

6. If multiple resources are added to the requisition, expand each resource to edit your calculated allocation amount.
7. Click Propose.

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

Modify and Resubmit Proposals

When you receive a notification that the project manager has rejected the resources on a requisition, you can modify and resubmit it.

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. For example, the selection of resources was constrained or their availability was limited.

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.
4. (Optional) Post a note on the Discussions page explaining your reason for declining the requisition.

Participate in Requisition Discussions

You can exchange messages about requisitions with other stakeholders. Only requisition recipients with access to the requisition can participate in discussions. A discussion thread begins with the first reply under the original message. Subsequent messages appear in descending order by date and time.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.
2. Open a requisition.
3. Click Discussions.

The Requisition Discussions: Message page appears.

4. Click the message icon or click Expand.
 - a. To start a discussion, click New.
 - b. To reply to an existing message, click the subject line of the message.
5. 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

Note: Configure your notification and email settings from the Account Settings: Notifications page.

6. Click Save and Return to send the message.

Your message appears in the Messages section of the Requisition Discussion: Messages page.
7. (Optional) To collapse all open threads, click Discussions.

Manage an Automated Requisition Process

In the out-of-the-box system for requisitions, notification generation depends on manually changing the status of the requisition. If the status of *new* requisitions is not changed to *open*, the recipients cannot know about or fulfill the new requisition.

You can avoid notification uncertainty by configuring 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.

Note: When you create a process in a requisition, it is available only for that requisition. When an 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.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.
2. Click a requisition and click Processes.

The Requisition Processes page appears.

3. Click *Initiated* to view process instances that are scheduled to run or running, and to track their progress.
4. Click *Available* to view the existing local processes that apply only to this requisition and any global processes that are used by any requisition. If many processes are available, use the filter section of the page.
5. Click New to define a new process.
6. Save your changes.

The new process appears in the list of available requisition processes.

7. To start a process manually, select it and then click Start.
8. Set the object for the requisition process.

Audit Requisitions

The Requisition Audit Trail page allows you to see when certain issue fields were changed, and who made the changes. In this way, you can track changes by resource and date. Your administrator determines the requisition fields that are available to you on the page.

Follow these steps:

1. Open Home, and from Resource Management, click Resource Requisitions.
2. Click a requisition and click Audit.
3. Filter the list.

The audit fields for the requisition appear.

Chapter 5: Resource Capacity Planning

This section contains the following topics:

[Resource Capacity Planning Terms](#) (see page 47)

[Resource Planning Portlets](#) (see page 51)

[How to Work with Capacity Planning Scenarios](#) (see page 55)

[How to Manage Capacity Planning](#) (see page 69)

Resource Capacity Planning Terms

As a resource manager working with resources and roles, familiarize yourself with the following 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, 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

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.

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.

Remaining Work

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

Actuals

Actuals are the total number of hours logged by staff reporting into an organizational unit. Actuals are work units and not cost. Actuals refers to work that has been completed and posted to an investment.

For example: Last week, Mary's three team members logged a total of 139 hours of time in the system to various projects. The total actuals for last week for Mary's team is 139 hours.

Capacity Planning

Capacity Planning is the practice of evaluating resources, demand, and performance to improve utilization for maximum productivity. Capacity Planning includes the following processes:

- Establishing utilization targets for resources according to role or skill.
- Analyzing project metrics to continuously adjust utilization targets, resource assignments, and project goals to maximize productivity.
- Proactive capacity planning allows organizations to finalize a release roadmap that maximizes resource utilization

The main objective of the Capacity Planning Overview portlet is to provide a complete picture of capacity, demand, remaining capacity, and actual hours provided by any given unit in the organization from a resource OBS hierarchical view.

Capacity

Capacity is defined as the total amount of time that a resource makes available to the organization as part of their work contract. Capacity is also known as aggregated availability. The capacity for an organizational unit is the total amount of collective time for all resources in that unit. **Resource OBS hierarchies can be defined to model staffing needs. Often, these OBS units represent reporting relationships or geographies or business units.** Clarity uses Resource OBS hierarchies to filter capacity results in the portlets. Capacity includes named resources that belong to an OBS or descendant OBS and does not include roles.

For example, If a person is contracted to work 40 hours each week, he has 40 hours of capacity.

Mary has a team of three direct reports that work 40 hours each week. The capacity for Mary's organizational unit for any given week for is 120 hours. Note that Mary is not included in the capacity of her team. If Mary has down-line staff that report into her direct reports, the total capacity for Mary's organization is made up of the aggregate capacity of all the organizations that report into her.

Demand

Demand is defined as the total amount of requested time on a resource or role in the organization. Demand is based on the Planned Allocation for team members allocated to an investment. Demand includes allocations for both named staff and requested roles from an organizational unit. Clarity uses the Team Staff OBS unit to qualify demand when filtering by OBS. Demand is made up of hard-booked time and soft-booked time. If the Team Staff OBS is blank, it refers to the Resource OBS.

Examples:

- John is in Mary's team. He has been hard-booked to project A at 20 hours next week, and soft-booked to project B at 10 hours next week. The total demand for John for next week is 30 hours.
- Bill is in Mary's team. He has been hard-booked 40 hours next week only to project A. The total demand for Bill for next week is 40 hours.
- Sue is the last member of Mary's team. She has not been allocated to any project. The demand for Sue is 0 hours.
- A role has been designated and hard-booked to project A at 35 hours for next week. In the properties of the role for that project, Mary's team is designated as the Staff OBS unit. Therefore, the demand for that role for Mary's team for next week is 35 hours.

The total demand for the resources in Mary's organization is 105 hours for the next week, 60 of those hours are hard-booked staff, 20 soft-booked, and 35 unfulfilled roles.

Remaining Capacity

Remaining Capacity is defined as the total amount of time that any organization has available to work on projects and that has not already been booked or requested of that unit. It is the difference between capacity and demand. $\text{Capacity} - \text{Demand} = \text{Remaining Bandwidth}$.

From the examples above, Mary's organization has 15 hours of available bandwidth for next week.

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 Settings options located under Project Management in the Administration menu. 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.

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.

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.	<ul style="list-style-type: none"> ■ 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.	<ul style="list-style-type: none"> ■ OBS Resource Aggregation ■ OBS Investment Aggregation

Resource Planning Page	Description	Portlets
Top Down Planning	This page lists investments and the resources and roles that are allocated to each investment.	<ul style="list-style-type: none">■ 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.	<ul style="list-style-type: none">■ Resource Workloads
Allocations	This page provides several options to view and edit resource allocations on individual investments.	<ul style="list-style-type: none">■ 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.	<ul style="list-style-type: none">■ Unfilled Requirements
Bookings	This page provides a list of resources with information about their booking status for all investments.	<ul style="list-style-type: none">■ Booking Status

Portlets help you achieve the following tasks or view the following data:

- 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.

Use the Resource Planning pages 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.

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.

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
- Unfilled Roles Portlet
- Investment Demand Portlet

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.

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.

Capacity Planning Scenarios

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 can add investments to the scenario manually or automatically to specify the investments that you want to examine.

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.

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.

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.

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.

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. When you view tentative data in a new scenario, the scenario toolbar appears.
6. Save your changes.

Example

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

- a. While in a scenario, make 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.
- 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.

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

You can add investments to scenarios manually, using a power filter, or automatically when editing the investment attributes. For example, 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 to the scenario.

Follow these steps:

1. Open the scenario investments page.
2. To add specific investments, click Add.
 - a. On the Select Investments window, select the investments to include.
 - b. Click Add.
3. To add investments meeting certain filtering criteria, click Add with Power Filter.

The select investment type page appears.
4. Select an investment type and click Next.

The power filter page appears.
5. 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: You can change an *investment expression* to automatically propagate to all investments added using that investment expression. Synchronize the investments to update the data.

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.

Show or 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.

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

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.

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

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.

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.

Follow these steps:

1. From a page that displays the scenario toolbar, click More and select Manage Scenarios.
2. Select the check box next to the capacity planning scenario, click More, and select Delete.
3. Click Yes to confirm.

Note: You can also use the Delete option from the More button on the scenario toolbar.

Set the Current and Compare Scenarios

Select a scenario to represent the *current* context for all capacity planning scenario-enabled pages. You can also select a *compare to* scenario to represent a change for all capacity planning scenario-enabled pages.

Follow these steps:

1. On the capacity planning scenarios page, select a scenario.
2. Click More and select Set Current.

The scenario is set as the current capacity planning scenario and is the default in the Scenario field.

3. On the capacity planning scenarios page, select another scenario.
4. Click More and select Set Compare.

The scenario is the capacity planning *compare to* scenario and is the default in the Compare To field.

Reset to Plan of Record

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

Follow these steps:

1. Navigate to the capacity planning scenarios page.
2. Click More and select Reset.

The current scenario is cleared and all the scenario-enabled pages are reset to the plan of record.

View Role Capacity from a Scenario

You can view role capacity from a scenario.

Follow these steps:

1. Navigate to any page with scenarios, including the capacity planning scenarios page.
2. From the scenario toolbar, click More and select Go to Capacity Planning.

The resource planning capacity page appears.

3. View the following data across investments:
 - availability by role
 - allocated work and 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.

Follow these steps:

1. Navigate to the scenario properties page or scenario: investments page.
2. 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.

How to Manage Capacity Planning

Use the Capacity Planning Overview portlet to get a complete picture of the capacity, demand, remaining bandwidth, and the actual hours provided by any given unit in the organization from a Resource OBS hierarchical view. The capacity planning status for a selected OBS unit is presented in a grid format and a bar graph. The capacity planning data is rolled up to the OBS level you select. The grid provides drill-down to the following sub-portlets:

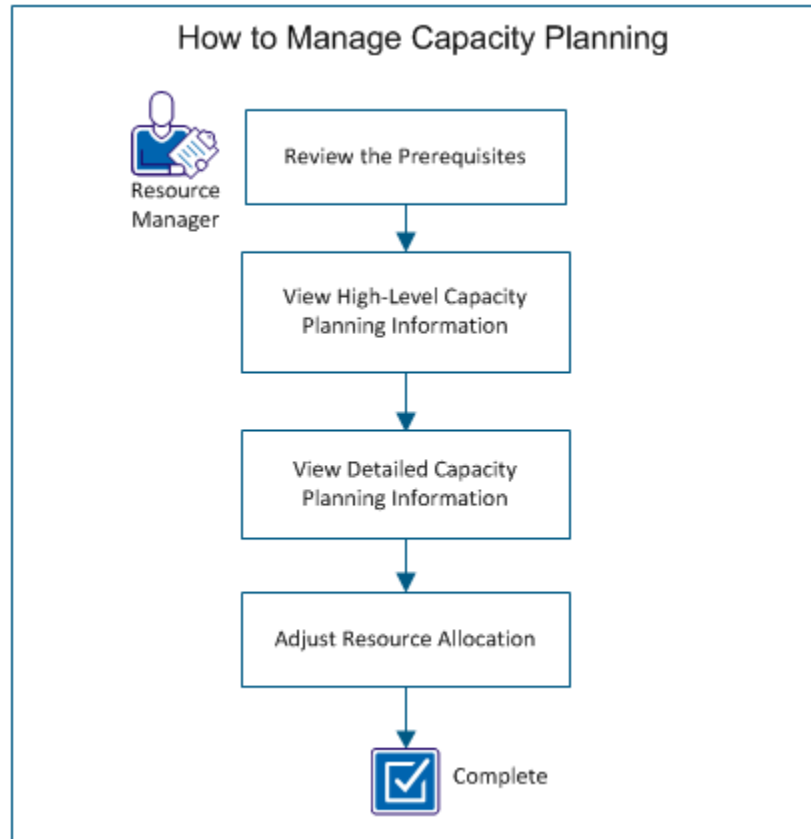
- Staff allocation: Resources who are assigned to projects.
- Unfilled roles: Staffing requirements not yet filled.
- Investment demand: Staffing allocation on a by-investment basis.

For example, Forward, Inc. uses its reporting relationships to model one of its Resource OBS units. Mary has a team of three direct reports who work 40 hours each week in the Research organization. The capacity of the direct reports for any given week is 120 hours. Mary also has 15 indirect employees who report to her direct reports. The total capacity of Mary's organizational unit is the sum of the direct reports plus the indirect reports.

As a manager, Mary wants to understand the total investment demand for resources in the organization, including allocated staff and unfilled roles. Mary navigates to the Capacity Planning Overview page. Here Mary can see a grid portlet and a graph portlet on the same page. Mary sets the Resource OBS filter to be the top-level unit of the organizational Resource OBS (level with the direct reports). Mary sets the OBS filter modes to include the unit and descendants, and then filters.

At a glance, Mary can see the aggregated information for the OBS unit and its descendant. The information helps with decisions about the team workload (allocation demand), capacity, booking status, and trends for posting actual work. Mary can also drill down to get details on the allocation of individual resources, unfilled roles, and demand for resources by investment.

The following diagram describes how a resource manager manages capacity planning.



Follow these steps:

1. Review the prerequisites.
2. View high-level capacity planning information.
3. View detailed capacity planning information.
4. Adjust resource allocation.

Review the Prerequisites

Verify that you have satisfied the following prerequisites:

- ☐ Define the necessary OBSs.
- ☐ Associate resources or roles with the appropriate OBS units.
- ☐ Assign a primary role to all resources.
- ☐ (Optional) Use the Staff OBS field on the Role Properties page to indicate the resource OBS unit that fills the role.
- ☐ Assign access rights to users who manage capacity planning:
 - *Resource - View - All*
 - *Page - View*
 - *Portlet - View*

Note: To assign the preceding access rights using a group, assign the user to one of the following groups: Resource Manager or Resource Planner.

- ☐ Access rights to individual investment types, as appropriate:
 - *Application - View - All*
 - *Asset - View - All*
 - *Other Work - View - All*
 - *Products - View - All*
 - *Program - View - All*
 - *Project - View - All*

View High-Level Capacity Planning Information

View the Capacity Planning Overview page to see a high-level summary of resource capacity, unfilled roles, and resource demand at a selected OBS level. Set the filtering criteria for the Capacity Planning Overview to display information about the appropriate resource and investment OBS units.

For example, to see the overall OBS capacity and demand, select a high-level OBS unit with OBS descendant units. To narrow the information that appears, you can elect to see only the information for a specific OBS unit with no information from ancestor or descendant OBS units.

Follow these steps:

1. Open Home, and from Resource Management, click Capacity Overview.
2. Select the Resource OBS in the filter section.

A value is required in this field to produce results in the Capacity Planning Overview portlets.

3. Select other filter criteria to narrow the information about resources and investments that you want to view, and click Filter.

The Capacity Overview portlet displays the information based on the filter you select:

Capacity Overview

This portlet provides an overview of resource capacity rolled up for the target resource OBS unit. If you selected *Unit only* in the filter for Investment OBS -Filter Mode, you see the resource allocation for the individual OBS unit. If you selected *Unit and ancestors* or *Unit and descendants*, information for parent or child OBS units also displays in a hierarchy format.

The default time period that is shown is monthly. Monthly hour totals are presented for the following items in the OBS unit:

- Capacity
- Demand
- Hard-booked Staff
- Soft-booked Staff
- Unfilled roles
- Remaining bandwidth
- Actuals

This portlet contains icons that let you drill down to detailed information about individual resources, unfilled roles, and demand for resources by investments.

Capacity Summary

This portlet provides a visual representation of the information presented in the Capacity Overview portlet. The bar graph shows time-scaled values for the OBS unit for unfulfilled roles, soft-booked staff, and hard-booked staff. In addition, line graphs track capacity and actuals.

View Detailed Capacity Planning Information

Use the icons in the Capacity Planning Overview portlet to drill down to detailed resource information for an OBS unit. Each icon represents a different set of information. The detailed information presented is based on the filter criteria that are set for the Capacity Planning Overview page.

For example, consider the following setup for the Capacity Planning Overview page. You select a specific Resource OBS and you select *Unit and descendants* as the filter mode. You see the OBS unit and its descendants displayed in the Capacity Planning Overview page. You want to see staffing allocation details for a specific descendant OBS unit, and you click the Resources icon for the descendant. What displays in the Staff Allocation portlet is the staff allocation information for the descendant portlet and any descendants that belong to it.

The following detailed resource information is available by clicking an icon for an OBS unit:

- **Staff Allocation (Resources icon):** Lists the resources for the selected OBS unit, their primary role, and their allocation over the same time periods that are shown on the Capacity Planning Overview page.
- **Unfilled Roles (Roles icon):** Lists the unfilled role requests for the OBS unit, the investments that are requesting roles, and allocation information for the role requests.
- **Investment Demand (Investment icon):** Lists the investments that are associated with the OBS unit, the investment manager, start and finish dates for the investment, and the allocation of resources from the selected OBS.

Follow these steps:

1. Display the information for an OBS unit in the Capacity Planning Overview page portlet.
2. Click the appropriate icon for the OBS unit whose detailed information you want to view.

Adjust Resource Allocation

Examine the detailed capacity planning information for resources and make any adjustments.

Follow these steps:

1. Open the Capacity Planning Overview page.
2. Enter the appropriate filter criteria, and review your resource allocations.
3. Make any adjustments.

When you are satisfied with the adjustments, you have successfully used the Capacity Planning Overview page to manage capacity planning.