

# Clarity PPM Resource Management in a nutshell

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# Agenda

- Clarity PPM Resource Management Basic Terminology
- Demo (Everything I can address in 45 minutes!)
- Q&A

# What is Clarity Resource Management?

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

- Create and edit resource profiles that identify a variety of characteristics including primary role, skills, experience, employee type and more.
- View, edit, and track resource project allocations and workloads.
- Compare resource capacity with resource demand.
- Create, edit, and fill simple or detailed resource requisitions.
- Locate resources with specific characteristics, by availability, and more.

# Clarity Resource Management Key Terminology

## User vs. Resource vs. Team Member

- A User is a person that actually logs into Clarity and uses the application.
- A Resource is a person that can be assigned to a project to perform work.
- A Team member is a resource that has been allocated to a project

NOTE: when you create a new user, a corresponding resource is created; and vis-versa.

# Clarity Resource Management Key Terminology Continued

## Availability

- The amount of time a resource is able to work on a project; based upon the resource calendar.

## Allocation

- The amount of time a team member is allocated to work on a project.

## Capacity

- The total full-time employee (FTE) resources available for a role in a project.

## Demand

- The amount of time requested for a resource to fulfill on a project.

# Clarity Resource Management Key Terminology Continued

## Hard Booked status

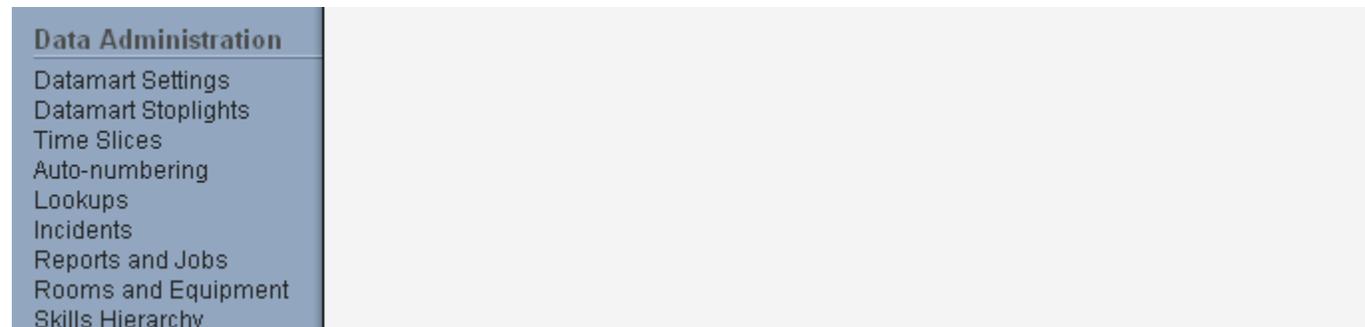
- A team member whose allocation is committed to a project. This commitment is usually done by a Resource Manager.

## Soft Booked status

- A team member who is tentatively booked to a project and whose Allocation has not yet been committed by a Resource Manager. Normally a Project Manager soft books a resource to a project.

# Demo

Skills can be used in Clarity to help define the skill set and interest level for the resource. Administrators can access the Skills Hierarchy from the Admin Tool.



Here's a list of the skills presently in Clarity. To create a new skill, click on "New".

Administration Tool 

### Skills Hierarchy

**Skill Filter**

Skill Name	<input type="text"/>	Skill ID	<input type="text"/>
Parent Skill	<input type="text"/>  	Description	<input type="text"/>
Status	Active <input type="button" value="v"/>		

Skill▲	ID	Parent Skill	Description
C++ Developer	C++ Developer		
German	German		
Java developer	java		
Microsoft Project	Microsoft Project		
SQL Server	SQL Server		

Total Results: 5

Create a skill using the attributes below. You can also define a Parent skill.

The screenshot shows a web browser window with the title "CA Clarity PPM :: Create Skill". The browser's address bar shows "CA Clarity PPM Administration Tool". The page has a left-hand navigation menu with sections: "Organization and Access" (Resources, Groups, OBS, License Information), "CA Clarity Studio" (Partition Models, Objects, Queries, Portlets, Portlet Pages, Menu Manager, UI Themes, Add-Ins, Views), and "Data Administration" (Datamart Settings, Datamart Stoplights, Time Slices, Auto-numbering). The main content area is titled "Create Skill" and contains a form with the following fields:

- Skill Name**: XOG (marked as Required and Unique)
- Skill Code**: XOG (marked as Required and Unique)
- Parent Skill**: Clarity (with a trash icon)
- Description**: XML Open Gateway
- Active**:

At the bottom of the form, there are "Save", "Submit", and "Cancel" buttons. A legend below the form indicates: \* = Required, # = Unique.

Create a skill using the attributes below. You can also define a Parent skill.

The screenshot shows a web browser window with the address bar displaying "CA Clarity PPM :: Create Skill". The page title is "Administration Tool" and the main heading is "Create Skill". The form includes a navigation sidebar on the left with sections for "Organization and Access", "CA Clarity Studio", and "Data Administration". The main form area contains the following fields:

- Skill Name:** XOG (marked as Required and Unique)
- Skill Code:** XOG (marked as Required and Unique)
- Parent Skill:** Clarity (with a dropdown arrow and a trash icon)
- Description:** XML Open Gateway
- Active:**

At the bottom of the form, there are "Save", "Submit", and "Cancel" buttons, and a legend indicating that a red asterisk (\*) denotes a Required field and a blue hash (#) denotes a Unique field.

Select the Skills tab on the in Resource Properties to assign skills to a resource.

**Resource: Properties: Main - General** ( Resource-Labor: Taunya Moore )

Properties Skills Allocations Document Manager Calendar

Main : Contact Information : Financial

Save Submit Cancel

Properties

- ▶ General
- Access to this Resource
- ▶ Full View
- ▶ Resource
- ▶ Group
- ▶ OBS Unit

**General**

* Last Name	Moore
* First Name	Taunya
* # Resource ID	tmoore
* Email Address	niku6test@niku.com
Primary Role	DBA  
Category	
* Employment Type	Employee 
External	<input type="checkbox"/>
Date of Hire	<input type="text"/> 
Date of Termination	<input type="text"/> 
* Availability	8.00
Input Type Code	<input type="text"/>  

# Demo

You can not only assign skills but also define the level or proficiency and interest. This will be helpful when Resource Managers staff resources to a project.

**Resource Skills** (Resource-Labor: Taunya Moore)

Properties **Skills** Allocations Document Manager Calendar

Skill Name  Skill ID

Parent Skill    Description

Filter Show All Clear

<input checked="" type="checkbox"/>	Skill▲	ID	Parent Skill	Description	Proficiency	Interest	Weighting
<input type="checkbox"/>	Microsoft Project	Microsoft Project			1 - Beginner	5 - Medium	1

Total Results: 1

Add Save Remove

- 1 - Beginner
- 2 - Beginner
- 3 - Beginner
- 4 - Advanced
- 5 - Advanced
- 6 - Advanced
- 7 - Advanced
- 8 - Expert
- 9 - Expert
- 10 - Expert

# Demo

You can not only assign skills but also define the level or proficiency and interest. This will be helpful when Resource Managers staff resources to a project.

**Resource Skills** (Resource-Labor: Taunya Moore)

Properties **Skills** Allocations Document Manager Calendar

Skill Name  Skill ID

Parent Skill    Description

Filter Show All Clear

<input checked="" type="checkbox"/>	Skill ▲	ID	Parent Skill	Description	Proficiency	Interest	Weighting
<input type="checkbox"/>	Microsoft Project	Microsoft Project			1 - Beginner	5 - Medium	1

Total Results: 1

Add Save Remove

- 1 - Beginner
- 2 - Beginner
- 3 - Beginner
- 4 - Advanced
- 5 - Advanced
- 6 - Advanced
- 7 - Advanced
- 8 - Expert
- 9 - Expert
- 10 - Expert

# Demo

To staff a resource to a project, select “Add” from the team list page; from the Select Resources page, you can filter for roles as I have done below. Just select the role and click “Add”

**Select Resources** (Investment: Save the World)

**Select Resource Filter**

Filter [ --Select-- ]

Resource/Role Name	<input type="text"/>	Type	All
Resource/Role ID	<input type="text"/>	Employment	All
OBS Unit	<input type="text"/>  	Active	Yes
OBS Unit Filter Mode	Unit only	Power Filter	<a href="#">[Build Power Filter]</a>
Is Role	Yes		

Filter Show All Save Filter Clear

<input checked="" type="checkbox"/>	Resource/Role ▲	ID	Email	Resource Type
<input checked="" type="checkbox"/>	Architect	 Architect		Labor
<input type="checkbox"/>	DBA	 DBA		Labor
<input type="checkbox"/>	PM	 PM		Labor
<input type="checkbox"/>	QA	 QA		Labor

Total Results: 4

# Demo

From the Team Staff page, you can choose to replace the role with a resource or Create a Requisition.

**Project: Team: Staff** (Project: Save the World) [Manage]

Properties **Team** Tasks Financial Plans Chargebacks Hierarchy Risks/Issues/Changes Collaboration Processes Dashboard

Staff : Detail : Role Capacity : Participants : Participant Groups : Requisitions

Scenario [ --Plan of Record-- ] New More>> Compare To [ --Plan of Record-- ]

**Project Team** [ --Actions-- ]

Filter System Default [Ex]

<input type="checkbox"/>	<input type="checkbox"/>	Resource▲	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation	Actuals
<input type="checkbox"/>	<input type="checkbox"/>	Architect	Architect	✓	Soft	New	9/7/10	12/31/10	100.0%	672.00	0.00
<input type="checkbox"/>	<input type="checkbox"/>	Dumbrill, Stephanie		✓	Hard	New	9/7/10	12/31/10	100.0%	672.00	0.00

Total Results: 2

Add Add/Update by OBS  Remove More>>

Work Effort = Hours

- ✓ Shift Allocation
- ✓ Set Allocation
- ✓ Estimate from Allocation
- ✓ Allocate from Estimates
- ✓ Create Requisitions
- ✓ Accept Hard Allocation
- ✓ Commit Planned Allocation

From the Create Requisition page, we are going to request a resource to fulfill the Architect role. Dakshesh will be the booking manager. From here we click “Create and Open”

Search [ Advanced ]

---

**Create Requisitions** ( Project: Save the World )

---

**Select Requisition Type**

Requisition Type

- Request Resources
- Unbook Resources (Remove all hard allocation not in plan)
- Replace Resources (Replace all hard allocation with new resource)

---

**Resources**

Resource	Booking Manager
Architect	Patel, Dakshesh  

Create Create and Open Cancel

# Demo

To access the requisition, click on the “Requisitions” Link. Also note that that the Role is currently Soft booked, meaning that the Resource manager still needs to approve the booking.

The screenshot shows a software interface for a project team. At the top, it displays "Project: Team: Staff" with a sub-project name "( Project: Save the World )". Below this are several tabs: Properties, Team (selected), Tasks, Financial Plans, Chargebacks, Hierarchy, Risks/Issues/Changes, Collaboration, and Pr. A breadcrumb trail reads "Staff : Detail : Role Capacity : Participants : Participant Groups : Requisitions". There are also dropdown menus for "Scenario" and "Compare To", both set to "[--Plan of Record--]", along with "New" and "More>>" buttons.

The main section is titled "Project Team" and includes a "Filter" dropdown set to "System Default". Below this is a table with the following columns: Resource, Project Role, Time, Booking Status, and Requisition Status. The table contains two rows of data:

Resource	Project Role	Time	Booking Status	Requisition Status
Architect	Architect	✓	Soft	Open
Dumbrill, Stephanie		✓	Hard	New

Below the table, it says "Total Results: 2" and provides buttons for "Add", "Add/Update by OBS", "Remove", and "More>>".

# Demo

On the Requisitions page, you can see what requisitions have been requested on this project. Click on the “Architect” link to access the Requisition’s properties.

**Project: Team: Requisitions** ( Project: Save the World )

Properties **Team** Tasks Financial Plans Chargebacks Hierarchy Risks/Issues/Changes Collaboration Processes Dashboard

Staff : Detail : Role Capacity : Participants : Participant Groups : **Requisitions**

**Project Requisition Filter** [--Action]

Filter [--Select--]

Requisition Name	<input type="text"/>	Status	All
Requisition ID	<input type="text"/>	Priority	All
Booking Manager	<input type="text"/>	Unbook	All
Requested By	<input type="text"/>	Power Filter	[Build Power Filter]

Filter Show All Save Filter Clear

<input checked="" type="checkbox"/>	Requisition ▲	Unbook	Status	Priority	Due Date	Booking Manager	Start	Finish
<input type="checkbox"/>	Architect		Open	Medium	9/12/10	Patel, Dakshesh	9/7/10	12/31/10

Total Results: 1

Delete  Propose  Book  Reject

# Demo

On the Requisition Properties you can see information about the requisition and also modify the requested amount if you wish. From here, click on the “Resources” Tab.

**Requisition Properties** ( Project: Save the World | Requisition: Architect )

Properties Resources Discussions Processes

Save Submit Cancel

### General

* Requisition Name	Architect	Requested By	Yee, Bill		
* Requisition ID	50123682010-09-12T14:51:39	Booking Manager	Patel, Dakshesh		
Description		Requirement Name	Architect		
Due Date	9/12/2010 	Requested Resource	Architect		
Priority	Medium	Project	Save the World		
* Status	Open	Unbook	<input type="checkbox"/>		
		Replace	<input type="checkbox"/>		

### Requested Amount

	* Start	* Finish	Percentage
<input type="checkbox"/>	9/7/2010 	12/31/2010 	100%
<input type="checkbox"/>			

New Row  Delete

The Project Manager can choose to search and add a particular resource to the project by clicking on the “Add” button.

**Requisition Resources** ( Project: Save the World | Requisition: Architect )

Properties **Resources** Discussions Processes

**Requisition Resources - Filter**

Filter [--Select--]

There are no items to display

[Add](#)

Here is a list of resources that are Architects and their availability match. From here you can select “Skills” to if you are interested in a Architect with a particular skill set.

**Find Resources** ( Project: Save the World )

Match scores may be inaccurate if availability dates do not fall within the following range: 1/31/10 - 1/31/11

**Resource Finder Filter** [--Actions--]

Filter [--Select--] [C]

<p>Last Name <input type="text"/></p> <p>First Name <input type="text"/></p> <p>Resource ID <input type="text"/></p> <p>OBS Unit <input type="text"/> </p> <p>OBS Unit Filter Mode <span>Unit only</span> <input type="text"/></p> <p>Role <span>Architect</span> </p> <p>Filter Mode <span>Selected only</span> <input type="text"/></p> <p>Employment <span>All</span> <input type="text"/></p> <p>Resume Keywords <input type="text"/></p>	<p>Availability <span>9/7/10 - 12/31/10 (672 Hours)</span> </p> <p>Availability Threshold (%) <input type="text"/> ( Hide results below this amount )</p> <p>Include Soft-booked Resources <input type="checkbox"/></p> <p>Skills  </p> <p>Skills Threshold (%) <input type="text"/> ( Hide results below this amount )</p> <p>Power Filter <a href="#">[Build Power Filter]</a></p>
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	Last Name▲	First Name	Resource ID	Employment	Skill Match	Availability Match	Total
<input type="checkbox"/>	Abdul	Jaleel	ahmmd01	Employee		98.81%	98.81%
<input type="checkbox"/>	Aguirre	Debra	daguirre	Employee		98.81%	98.81%
<input type="checkbox"/>	Leone	Joshua	jleone	Employee		98.81%	98.81%

Total Results: 3

# Demo

When we search for an architect that have Java Development experience, we see that we now have one result.

**Find Resources** (Project: Save the World)

Match scores may be inaccurate if availability dates do not fall within the following range: 1/31/10 - 1/31/11

**Resource Finder Filter** [--Actions--]

Filter [--Select--] [Coll]

Last Name	<input type="text"/>	Availability	9/7/10 - 12/31/10 (672 Hours)
First Name	<input type="text"/>		
Resource ID	<input type="text"/>	Availability Threshold (%)	<input type="text"/> ( Hide results below this amount )
OBS Unit	<input type="text"/>	Include Soft-booked Resources	<input type="checkbox"/>
OBS Unit Filter Mode	Unit only <input type="text"/>	Skills	Java developer; Wt(1); Prf Range: (3 - Beginner - 7 - Advanced); Int(4 - Me
Role	Architect		
Filter Mode	Selected only <input type="text"/>	Skills Threshold (%)	<input type="text"/> ( Hide results below this amount )
Employment	All <input type="text"/>	Power Filter	[Build Power Filter]
Resume Keywords	<input type="text"/>		

Filter 
  Show All 
  Save Filter 
  Clear

<input type="checkbox"/>	Last Name▲	First Name	Resource ID	Employment	Skill Match	Availability Match	Total M
<input checked="" type="checkbox"/>	Leone	Joshua	jleone	Employee	100.00%	98.81%	99.40%

Total Results: 1

Add  Cancel

# Demo

Here is a graphical representation in a time scale of the requested amount requested.

**Requisition Resources** ( Project: Save the World | Requisition: Architect )

Properties **Resources** Discussions Processes

Requisition Resources - Filter [ --Actions-- ]

Filter [ --Select-- ] [Exp]

	Resource▲	Start	Finish	Amount	Weekly Amount							
					9/6/10	9/13/10	9/20/10	9/27/10	10/4/10	10/11/10	10/18/10	
<input type="checkbox"/>	Leone, Joshua	9/7/10	12/31/10	672.00								
<b>Requested</b>		<b>9/7/10</b>	<b>12/31/10</b>	<b>672.00</b>	<b>32</b>	<b>40</b>						
<b>Total</b>		<b>9/7/10</b>	<b>12/31/10</b>	<b>672.00</b>	<b>32</b>	<b>40</b>						
<b>Difference</b>				<b>0.00</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Total Results: 1

Add  Delete Book Propose

# Demo

Dakshesh is the booking manager. He logs into Clarity and selects “Requisitions” from the navigation bar, and he will see a list of requisitions awaiting his action. From here, Dakshesh will click on the Architect link.

**Resource Requisitions**

Requisition Filter [--Actions--]

Filter  [--Select-- ] [C]

Requisition Name	<input type="text"/>	Status	All
Requisition ID	<input type="text"/>	Priority	All
Booking Manager	<input type="text"/>  	Unbook	All
Requested By	<input type="text"/>  	Project	<input type="text"/>  

Power Filter [\[Build Power Filter\]](#)

Filter  Show All  Save Filter  Clear

<input type="checkbox"/>	Requisition ▲	Unbook	Status	Priority	Due Date	Booking Manager	Requested By	Project	Start	Finish	A
<input type="checkbox"/>	Architect		Open	Medium	9/12/10	Patel, Dakshesh	Yee, Bill	Save the World	9/7/10	12/31/10	

Total Results: 1

Delete  Propose  Book  Reject

# Demo

Dakshesh can click on the Resources tab and see what resource is requested. If this is acceptable, Dakshesh can click on “Book”.

**Requisition Resources** (Project: Save the World | Requisition: Architect)

Properties **Resources** Discussions Processes

Requisition Resources - Filter [Filter] [--Select--] [Actions]

	Resource▲	Start	Finish	Amount	Weekly Amount							
					9/6/10	9/13/10	9/20/10	9/27/10	10/4/10	10/11/10	10/18/10	
<input type="checkbox"/>	Leone, Joshua	9/7/10	12/31/10	672.00								
<b>Requested</b>		<b>9/7/10</b>	<b>12/31/10</b>	<b>672.00</b>	<b>32</b>	<b>40</b>						
<b>Total</b>		<b>9/7/10</b>	<b>12/31/10</b>	<b>672.00</b>	<b>32</b>	<b>40</b>						
<b>Difference</b>				<b>0.00</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Total Results: 1

Add  Delete Book Propose

# Demo

Now in Dakshesh's requisitions, you can see that this requisition is now booked.

**Resource Requisitions**

**Requisition Filter**

Filter: [--Select--]

Requisition Name	<input type="text"/>	Status	All
Requisition ID	<input type="text"/>	Priority	All
Booking Manager	<input type="text"/>  	Unbook	All
Requested By	<input type="text"/>  	Project	<input type="text"/>

Power Filter: [Build Power Filter]

Filter Show All Save Filter Clear

Requisition	Unbook	Status	Priority	Due Date	Booking Manager	Requested By	
<input type="checkbox"/> Architect		Booked	Medium	9/12/10	Patel, Dakshesh	Yee, Bill	Save

Total Results: 1

Delete Propose Book Reject

# Demo

Back to the Team on the project, you'll see that the resource is now hard booked to the project inheriting the Role's allocation, and the role remains on the project for historical purposes.

**Project: Team: Staff** (Project: Save the World)

Properties **Team** Tasks Financial Plans Chargebacks Hierarchy Risks/Issues/Changes Processes Dashboard

Staff : Detail : Role Capacity : Participants : Participant Groups : Requisitions

Scenario [--Plan of Record--] New More>> Compare To [--Plan of Record--]

**Project Team** [--Actions--]

Filter System Default

<input type="checkbox"/>	<input type="checkbox"/>	Resource ▲	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Architect	Architect	✓	Soft	Booked	9/7/10	12/31/10	100.0%	0.00
<input type="checkbox"/>	<input type="checkbox"/>	Dumbrill, Stephanie		✓	Hard	New	9/7/10	12/31/10	100.0%	672.00
<input type="checkbox"/>	<input type="checkbox"/>	Leone, Joshua	Architect	✓	Hard	Booked	9/7/10	12/31/10	100.0%	672.00

Total Results: 3

Add Add/Update by OBS Remove More>>

Use the Resource Planning portlets to better manage your resources. You can access the Resource Planning portlets by clicking on Resource Planning on the left hand navigation.



# Demo

The Resource Workloads Portlet found under the Allocations tab is a great portlet to use to manage your Resource's allocations to projects. As you can see below, Stephanie is overallocated as noted by the red graphic.

Workloads		Allocations	Capacity	Investments				
Scenario	[--Plan of Record--]	New	More>>	Compare To	[--Plan of Record--]			
Resource Workloads					[--Actions--]			
Filter	[--Select--]							
Resource▲	Resource ID	Primary Role	Allocation					
			9/20/10	9/27/10	10/4/10	10/11/10	10/18/10	
Dumbrill, Dan	 ddumbrill							
Dumbrill, Stephanie	 sdumbrill							

Total Results: 2

# Demo

If you select the “Resource Allocation” Icon from the Resource Workload’s portlet, you can go to the Resource’s Allocation detail page. Here you can see that Stephanie is Allocated 100% on 2 projects for the same time period.

Resource/Role Allocations (Resource-Labor: Stephanie Dumbrill)									
Properties Skills <b>Allocations</b> Document Manager Calendar									
Summary : Detail									
Scenario [ --Plan of Record-- ] New More>> Compare To [ --Plan of Record-- ]									
Allocations - Filter									[ --Actions-- ]
Filter System Default									
☑	Investment Role	Investment ▲	Weekly Allocation						
			9/20/10	9/27/10	10/4/10	10/11/10	10/18/10		
<input type="checkbox"/>		Keep the Lights On	40.00	40.00	40.00	40.00	40.00		
<input type="checkbox"/>		Save the World	40.00	40.00	40.00	40.00	40.00		
<b>Aggregation</b>									
Total Results: 2									
Add <input checked="" type="checkbox"/> Remove <input checked="" type="checkbox"/> Shift Allocation <input checked="" type="checkbox"/> Accept Hard Allocation <input checked="" type="checkbox"/> Commit Planned Allocation									

# Demo

Use Scenarios to see how shifting the Allocation on a project will affect the overall allocation. Click on “New” on the Scenario tool bar to create a new scenario. The yellow highlight denotes that you are now in a Scenario. Select a project, and click on “Shift Allocation” to change the Allocation period for a project.

**Resource/Role Allocations** (Resource-Labor: Stephanie Dumbrell)

Properties Skills **Allocations** Document Manager Calendar

Summary : **Detail**

Scenario **New Scenario** New More>> Compare To [--Plan of Record--]

**Allocations - Filter**

Filter System Default

	Investment Role	Investment ▲	Weekly Allocation			
			9/20/10	9/27/10	10/4/10	10/11/10
<input type="checkbox"/>		Keep the Lights On	40.00	40.00	40.00	40.00
<input checked="" type="checkbox"/>		Save the World	40.00	40.00	40.00	40.00
<b>Aggregation</b>						

Total Results: 2

Shift Allocation

On the “Shift Allocation” page, you can choose to shift the allocation to a particular date, you can also specify when the shift date should end. If you do not wish to shift the entire allocation, you can shift a percentage of the allocation. In our example, we will shift entire allocation on the project to start in January.

**Shift Allocation** ( Resource: Dumbrill, Stephanie )

---

**Time Span to Shift**

Enter a Date Range to Shift

Start Date  

Finish Date  

---

**Time Shift Parameters**

Shift To Date  

Shift Cut-off Date  

Scale Allocation % By

# Demo

When you submit, you'll see the resulting allocation shift. You now see that Stephanie is no longer overallocated. NOTE: This does not affect Stephanie's actual allocation the project, it can be used for planning purposes, or be used as a recommendation for the project and resource managers.

**Resource/Role Allocations** (Resource-Labor: Stephanie Dumbrill)

Properties Skills **Allocations** Document Manager Calendar

Summary : Detail

Scenario New Scenario [v] New More>> Compare To [--Plan of Record--] [v]

**Allocations - Filter** [--Actions--]

Filter System Default [v]

	Investment Role	Investment ▲	Weekly Allocation				
			Sep 10	Oct 10	Nov 10	Dec 10	Jan 11
<input type="checkbox"/>		Keep the Lights On	144.00	168.00	176.00	184.00	
<input type="checkbox"/>		Save the World					168.00
<b>Aggregation</b>							

Total Results: 2

Shift Allocation

# Demo

Back to the Team on the project, you'll see that the resource is now hard booked to the project inheriting the Role's allocation, and the role remains on the project for historical purposes.

**Project: Team: Staff** (Project: Save the World)

Properties **Team** Tasks Financial Plans Chargebacks Hierarchy Risks/Issues/Changes Processes Dashboard

Staff : Detail : Role Capacity : Participants : Participant Groups : Requisitions

Scenario [--Plan of Record--] New More>> Compare To [--Plan of Record--]

**Project Team** [--Actions--]

Filter System Default

<input type="checkbox"/>	<input type="checkbox"/>	Resource ▲	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Architect	Architect	✓	Soft	Booked	9/7/10	12/31/10	100.0%	0.00
<input type="checkbox"/>	<input type="checkbox"/>	Dumbrill, Stephanie	Architect	✓	Hard	New	9/7/10	12/31/10	100.0%	672.00
<input type="checkbox"/>	<input type="checkbox"/>	Leone, Joshua	Architect	✓	Hard	Booked	9/7/10	12/31/10	100.0%	672.00

Total Results: 3

Add Add/Update by OBS Remove More>>

# Demo

Back to the Team on the project, you'll see that the resource is now hard booked to the project inheriting the Role's allocation, and the role remains on the project for historical purposes.

**Project: Team: Staff** (Project: Save the World)

Properties **Team** Tasks Financial Plans Chargebacks Hierarchy Risks/Issues/Changes Processes Dashboard

Staff : Detail : Role Capacity : Participants : Participant Groups : Requisitions

Scenario [ --Plan of Record-- ] New More>> Compare To [ --Plan of Record-- ]

**Project Team** [ --Actions-- ]

Filter System Default

<input type="checkbox"/>	<input type="checkbox"/>	Resource ▲	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Architect	Architect	✓	Soft	Booked	9/7/10	12/31/10	100.0%	0.00
<input type="checkbox"/>	<input type="checkbox"/>	Dumbrill, Stephanie	Architect	✓	Hard	New	9/7/10	12/31/10	100.0%	672.00
<input type="checkbox"/>	<input type="checkbox"/>	Leone, Joshua	Architect	✓	Hard	Booked	9/7/10	12/31/10	100.0%	672.00

Total Results: 3

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Questions?

thank you