

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

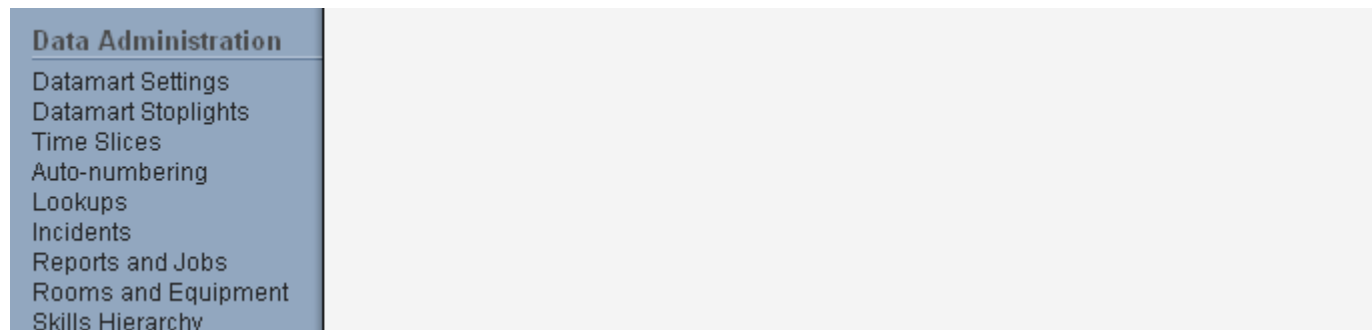
- A team member whose allocation is committed to a project. This commitment is usually done by a Resource Manager.

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	<input type="text" value="Active"/>		

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 address bar displaying 'CA Clarity PPM :: Create Skill'. The browser's tab bar shows 'Most Visited', 'Getting Started', and 'Latest Headlines'. The page header includes the 'CA Clarity PPM' logo and the title 'Administration Tool'. A left-hand navigation menu is visible, containing sections for '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' (required and unique, value: XOG), 'Skill Code' (required and unique, value: XOG), 'Parent Skill' (value: Clarity, with a tree icon), 'Description' (value: XML Open Gateway), and 'Active' (checked checkbox). Below the form are 'Save', 'Submit', and 'Cancel' buttons. A legend at the bottom indicates that a red asterisk (*) denotes a required field and a blue hash (#) denotes a unique field.

Most Visited Getting Started Latest Headlines

CA Clarity PPM :: Create Skill

CA Clarity PPM Administration Tool

Create Skill

Save Submit Cancel

* # Skill Name XOG

* # Skill Code XOG

Parent Skill Clarity

Description XML Open Gateway

Active ☒

Save Submit Cancel

* = 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 browser's tab bar shows 'Most Visited', 'Getting Started', and 'Latest Headlines'. The page header includes the 'CA Clarity PPM' logo and the title 'Administration Tool'. A left-hand navigation menu is visible, containing sections for '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' (required and unique, value: XOG), 'Skill Code' (required and unique, value: XOG), 'Parent Skill' (value: Clarity, with a tree icon), 'Description' (value: XML Open Gateway), and 'Active' (checkbox checked). Below the form are 'Save', 'Submit', and 'Cancel' buttons. A legend at the bottom indicates that a red asterisk (*) denotes a required field and a blue hash (#) denotes a unique field.

Most Visited Getting Started Latest Headlines

CA Clarity PPM :: Create Skill

CA Clarity PPM Administration Tool

Create Skill

Save Submit Cancel

*# Skill Name XOG

*# Skill Code XOG

Parent Skill Clarity

Description XML Open Gateway

Active ☒

Save Submit Cancel

* = Required # = Unique

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

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	
Date of Termination	
* Availability	8.00
Input Type Code	 



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

Resource/Role ID

OBS Unit  

OBS Unit Filter Mode Unit only

Is Role Yes






Type All

Employment All

Active Yes

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

Filter Show All Save Filter Clear

	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

✓ Add ✓ Add and Select More Cancel

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]

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

[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  

Demo

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

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







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

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

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

Project Team

Filter System Default

	Resource▲	Project Role	Time	Booking Status	Requ Stat
<input type="checkbox"/> 	Architect	 Architect		Soft	Open
<input type="checkbox"/> 	Dumbrill, Stephanie			Hard	New

Total Results: 2

Add Add/Update by OBS ☒ Remove More>>

Model Effect - Hours

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

Status All

Requisition ID

Priority All

Booking Manager

Unbook All

Requested By

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

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

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

Filter

--Select--

Last Name

First Name

Resource ID

OBS Unit

OBS Unit Filter Mode

Unit only

Role

Architect

Filter Mode

Selected only

Employment

All

Resume Keywords

Availability

9/7/10 - 12/31/10 (672 Hours)

Availability Threshold (%)

(Hide results below this amount)

Include Soft-booked Resources

☐

Skills

Skills Threshold (%)

(Hide results below this amount)

Power Filter




[Build Power Filter](#)

Filter

Show All

Save Filter

Clear

	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

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

First Name

Resource ID

OBS Unit

OBS Unit Filter Mode

Role

Filter Mode

Employment

Resume Keywords

Availability

Availability Threshold (%)

Include Soft-booked Resources

Skills

Skills Threshold (%)

Power Filter

9/7/10 - 12/31/10 (672 Hours)

(Hide results below this amount)

☐

Java developer; Wt(1); Prf Range: (3 - Beginner - 7 - Advanced); Int(4 - Me

(Hide results below this amount)

[Build Power Filter]

Filter Show All Save Filter Clear

	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						
Requested				9/7/10	12/31/10	672.00	32	40	40	40	40	40
Total				9/7/10	12/31/10	672.00	32	40	40	40	40	40
Difference						0.00	0	0	0	0	0	0
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--

[Co]

Requisition Name

Status

All

Requisition ID

Priority

All

Booking Manager

Unbook

All

Requested By

Project

Power Filter

[Build Power Filter]

Filter

Show All

Save Filter

Clear

Requisition

Unbook

Status

Priority

Due Date

Booking Manager

Requested By

Project

Start

Finish

A

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													[--Actions--]
Filter [--Select--]													
		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							
Requested				9/7/10	12/31/10	672.00	32	40	40	40	40	40	40
Total				9/7/10	12/31/10	672.00	32	40	40	40	40	40	40
Difference						0.00	0	0	0	0	0	0	0
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	Sav
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--]

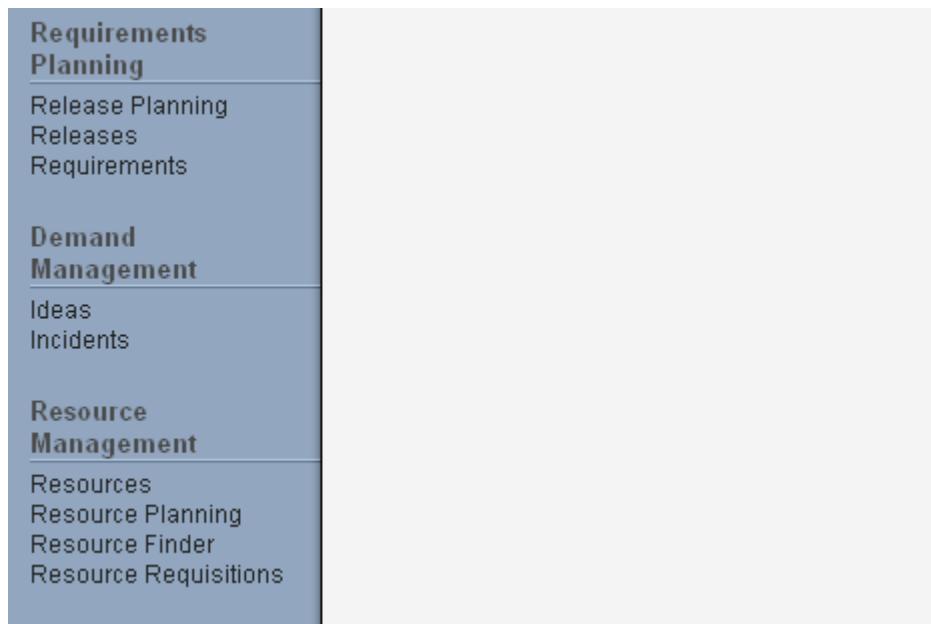
Filter System Default

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



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								

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)																																																											
<div> Properties Skills Allocations Document Manager Calendar </div>																																																											
Summary : Detail																																																											
Scenario [--Plan of Record--] New More>> Compare To [--Plan of Record--]																																																											
Allocations - Filter										[--Actions--]																																																	
Filter System Default																																																											
<table> <tr> <th rowspan="2"></th><th rowspan="2"></th><th rowspan="2"></th><th rowspan="2">Investment Role</th><th rowspan="2">Investment ▲</th><th colspan="5">Weekly Allocation</th><th rowspan="2"></th></tr> <tr> <th>9/20/10</th><th>9/27/10</th><th>10/4/10</th><th>10/11/10</th><th>10/18/10</th></tr> <tr> <td><input type="checkbox"/></td><td></td><td></td><td></td><td>Keep the Lights On</td><td>40.00</td><td>40.00</td><td>40.00</td><td>40.00</td><td>40.00</td><td></td></tr> <tr> <td><input type="checkbox"/></td><td></td><td></td><td></td><td>Save the World</td><td>40.00</td><td>40.00</td><td>40.00</td><td>40.00</td><td>40.00</td><td></td></tr> <tr> <td colspan="5">Aggregation</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </table>														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		Aggregation										
			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																																																		
Aggregation																																																											
Total Results: 2																																																											
Add ✓ Remove ✓ Shift Allocation ✓ Accept Hard Allocation ✓ 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

<input type="checkbox"/>		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
Aggregation							

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.

The screenshot shows a web form titled "Shift Allocation" for the resource "Dumbrill, Stephanie". The form is divided into two main sections: "Time Span to Shift" and "Time Shift Parameters".

Time Span to Shift

Enter a Date Range to Shift

Start Date: 9/12/2010

Finish Date: 12/31/2010

Time Shift Parameters

Shift To Date: 1/1/2011

Shift Cut-off Date: (empty)

Scale Allocation % By: (empty)

Buttons: Submit, Cancel

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 Dumbrell)



Properties Skills **Allocations** Document Manager Calendar

Summary : **Detail**

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

Allocations - Filter [--Actions--]

Filter System Default ▾

		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
Aggregation								

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

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

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

Questions?

thank you