Daptiv PPM Resource Manager

User Manual

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Introduction to Daptiv PPM

Getting started in Daptiv PPM can be as simple as logging in for the first time, and clicking on the items you need to access. Daptiv PPM is designed with enormous flexibility and can be customized for your organization, and in most cases this customization has been taken care of by your Daptiv PPM Administrator before you log in for the first time.

About the User Manual

This user manual is designed to walk you through the basic functionality of a Project Request as it goes through the project cycle. It also details information on resource planning and capacity planning within Daptiv PPM. **This guide does not cover basic functionality and concepts such as navigation, views and other common elements. Those topics are described in the Team Member User Manual and the Project Manager User Manual**.

Important: The features and functionality you see will depend on how your user profile and permissions were set up by your administrator, and on how your organization has decided to use Daptiv PPM.

Overview

There are many features discussed in this user manual that rely upon having your enterprise configured properly first by your organization's Daptiv PPM Administrator. Each segment will discuss those Administrative elements at a high level while the detailed instructions for configuration are provided in the Administrator User Manual. There are three main topics covered in this guide:

1. **Project Requests** – the creation, reviewing and approving of a potential project.
2. **Resource Management** – requesting a type of person or skill for a project and then approving a Daptiv PPM member that fits that skill.
3. **Capacity Planning** – a review of all project requests and/or projects and your resource availability to handle them. Planners will be able to focus resources on the most important projects within their portfolios.

Each application mentioned above may be bypassed if there is no desire to use the feature in Daptiv PPM.

Project Requests

The Project Requests Application allows eligible users (Executives, Resource Managers, Administrators, and any custom role created with the correct permissions) to review project requests and approve or decline them based on any number of custom defined project scoring metrics. This application not only allows users to view project requests, but more importantly it allows organizations to effectively select and plan their portfolio of projects based on which ones best align with their business strategy and maximize their return on investment.

Configuring Project Requests

Prior to using the Project Request application your enterprise Administrator sets up the types of requests you plan on managing. For example, an IT department at a large company receives many requests for projects from multiple departments to do things like re-wire board rooms, install new software applications, or upgrade a department's hardware.

The IT department manages their projects in Daptiv PPM and would like to capture those project requirements and data before initiating a real project inside Daptiv PPM. The requests they receive may come from non-Daptiv PPM users via a web form or through a logged in PPM user. Those requests contain information specific to what the IT department tracks. The Administrator sets up the request for the IT department and will need to know what information is to be asked on the request form. The Administrator can also create a web form for that request should you need to post it on a public facing web site or intranet. For any request it is possible to set up an approval policy associated with that request. The Administrator may designate a person or group of people to approve or decline a request as well as determine if the request should be routed in any order or not.

CONFIGURATION PREPARATION TO COMMUNICATE TO YOU PPM ADMINISTRATOR:

1. Indicate what type of project being requested.
2. Indicate what information is required on the Project Request form.
    - This may include a request description, due date, requestor contact information and other fields relevant to the type of request being made.
    - Fields may also be marked as required or not.
3. Indicate if you will require a web form.
    - People with a PPM login are generally able to create a Project Request from within the application.
    - People that do not have a PPM login will need to submit their requests via the web form.
4. Indicate if an approval policy is required.
    - Identify which users will have authority to approve or decline Project Requests and indicate if there is any routing needed for those requests.

Creating a Project Request

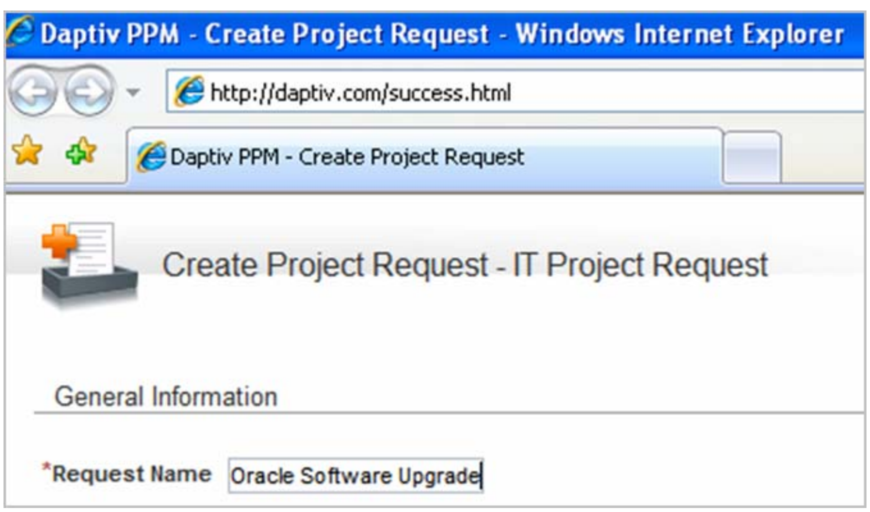
Once your PPM Administrator has created the framework for your Project Requests, you can begin creating the individual requests from the appropriate areas. There are a few ways to create a new Project Request. Depending on a user's Enterprise Profile they may or may not be able to access the Project Request form. If a user does not have the ability to create a Project Request they should be referred to your PPM Administrator.

Accessing the Project Request Form

By clicking **Create Project Request** from the **Projects** Tab:

By clicking **Create Project Request** from the **Project Requests** Tab:

By navigating to a web page where the web form is hosted:

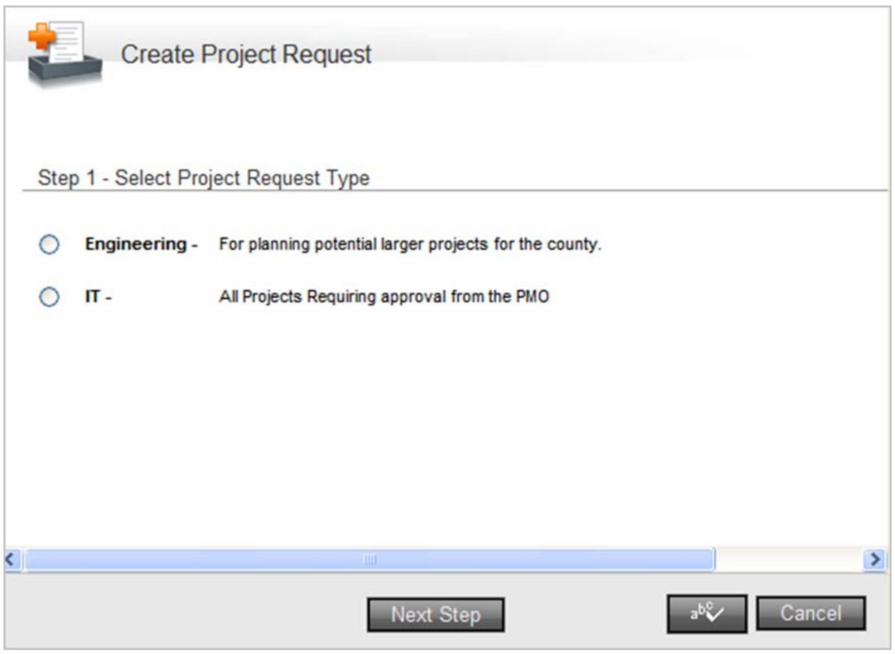


The Project Request Form Fields

The fields displayed on the form are comprised of the Project Type in which the request originated from. You have the option to make the fields visible or not, as well as required or not. If the request is going to be posted as a web form then it is suggested that you include contact information fields for the project requestor to fill in because without those fields you will not know who sent the request.

The example below illustrates a Project Request from within Daptiv PPM although the web form method would be similar (special fields noted).

Once you have accessed the Project Request area choose the desired request and click **Next Step**.



The fields displayed in your request will differ from those in the example below. Remember to expose only those fields that would make sense to the requestor. For example, we did not include the **Priority** field on the request form simply because every requestor would set it as high priority!

Once the form has been submitted, the designated reviewer makes the determination as to the priority level of the request and set the field accordingly.

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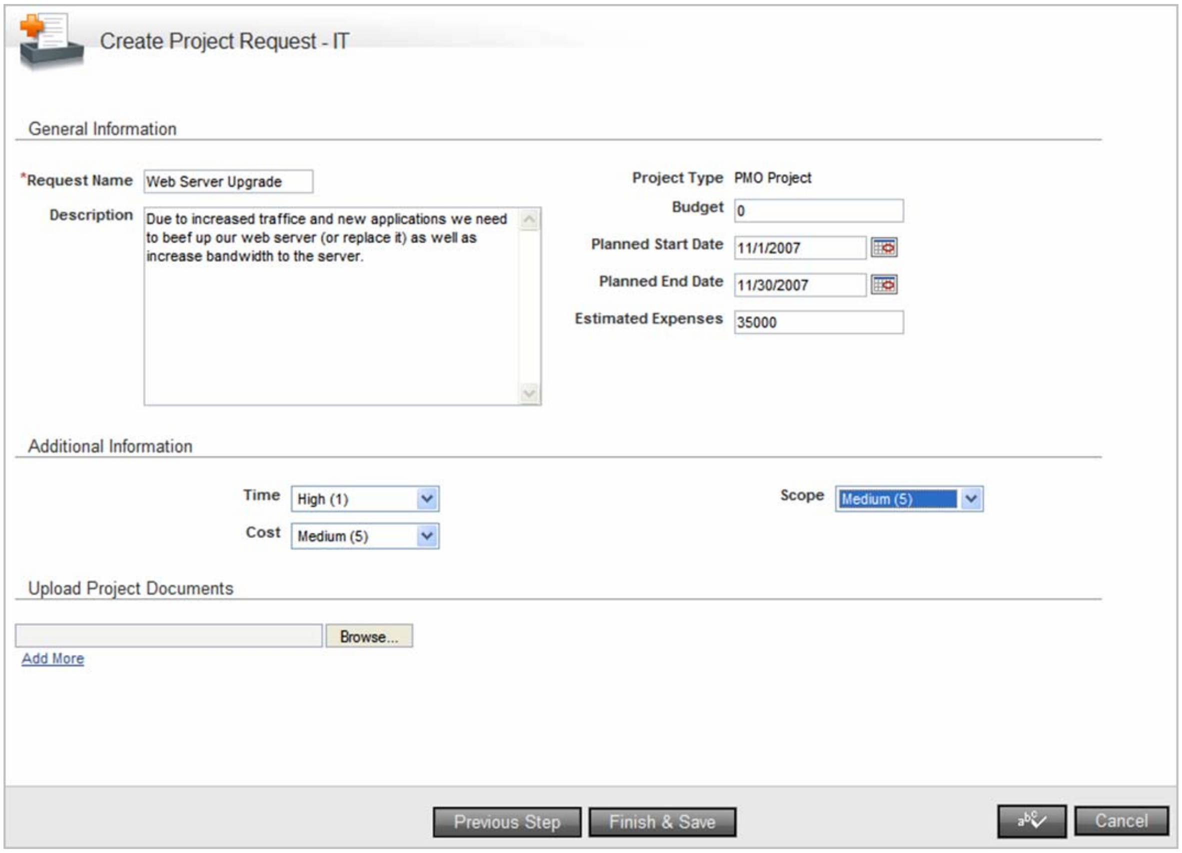
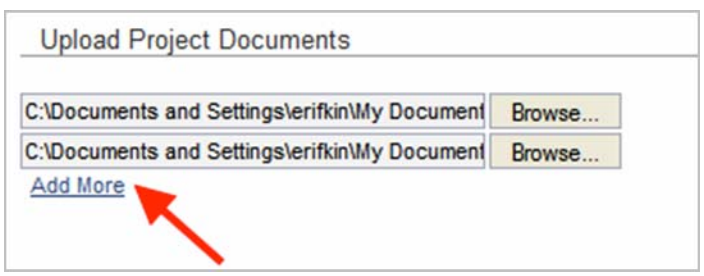


It is also possible to attach documents associated with the request. The requestor may include as many documents as needed. The web form function will also support document attachments. Click **Add More** to bring up additional browse buttons. Click **Finish & Save** to submit the form.

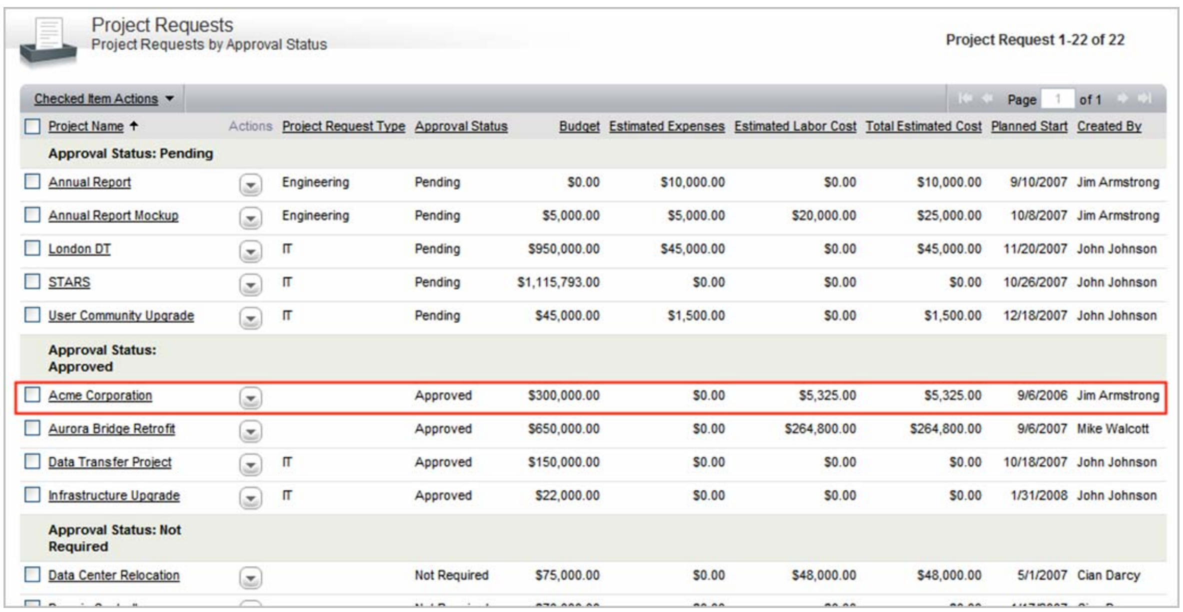


Reviewing Project Requests

Once a project request is submitted, someone needs to review and make a decision as to whether or not a project gets created in PPM. A person with the Enterprise Profile of Administrator, Executive, Resource Manage or Project Manager is able to manage and review requests. The new request will appear on the **Project Request** tab, and only if your view includes that project request. Some views filter out items so be sure to check your view's filters if you can not find an item you are looking for, it may be getting filtered out.

About Approval Policies

In the example below, our request appears as a new line item. Notice that the **Status** field indicates that the request is **Approved.** This is because we did not initiate an approval policy for the Standard IT Request. Although the request defaults to **Approved,** it still requires a user to manually generate a project from the request. Remember that you can implement an automated approval policy so that when a new request arrives, the required approver gets a notification and must approve the request *before* a project can be generated.


Project Requests
Project Requests by Approval Status
Project Request 1-22 of 22

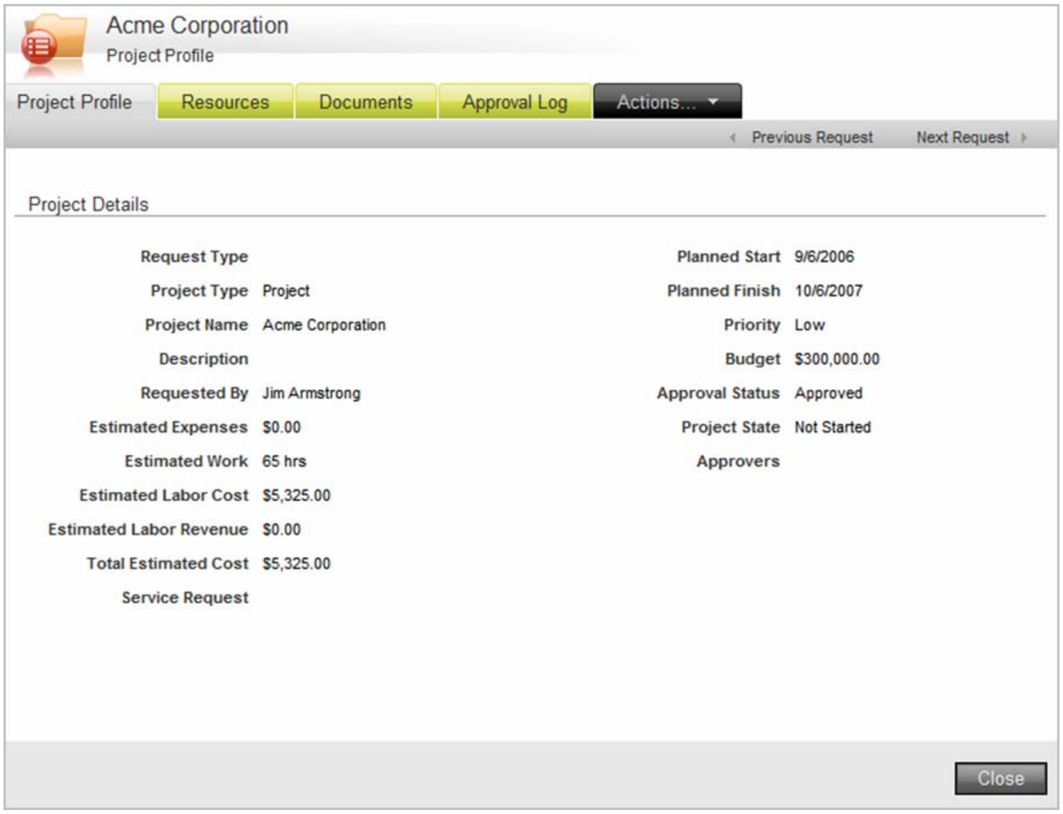
Checked Item Actions   Page 1 of 1

Project Name	Actions	Project Request Type	Approval Status	Budget	Estimated Expenses	Estimated Labor Cost	Total Estimated Cost	Planned Start	Created By
Approval Status: Pending									
Annual Report		Engineering	Pending	$0.00	$10,000.00	$0.00	$10,000.00	9/10/2007	Jim Armstrong
Annual Report Mockup		Engineering	Pending	$5,000.00	$5,000.00	$20,000.00	$25,000.00	10/8/2007	Jim Armstrong
London DT		IT	Pending	$950,000.00	$45,000.00	$0.00	$45,000.00	11/20/2007	John Johnson
STARS		IT	Pending	$1,115,793.00	$0.00	$0.00	$0.00	10/26/2007	John Johnson
User Community Upgrade		IT	Pending	$45,000.00	$1,500.00	$0.00	$1,500.00	12/18/2007	John Johnson
Approval Status: Approved									
Acme Corporation			Approved	$300,000.00	$0.00	$5,325.00	$5,325.00	9/6/2006	Jim Armstrong
Aurora Bridge Retrofit			Approved	$650,000.00	$0.00	$264,800.00	$264,800.00	9/6/2007	Mike Walcott
Data Transfer Project		IT	Approved	$150,000.00	$0.00	$0.00	$0.00	10/18/2007	John Johnson
Infrastructure Upgrade		IT	Approved	$22,000.00	$0.00	$0.00	$0.00	1/31/2008	John Johnson
Approval Status: Not Required									
Data Center Relocation			Not Required	$75,000.00	$0.00	$48,000.00	$48,000.00	5/1/2007	Cian Darcy

The Project Profile Tab

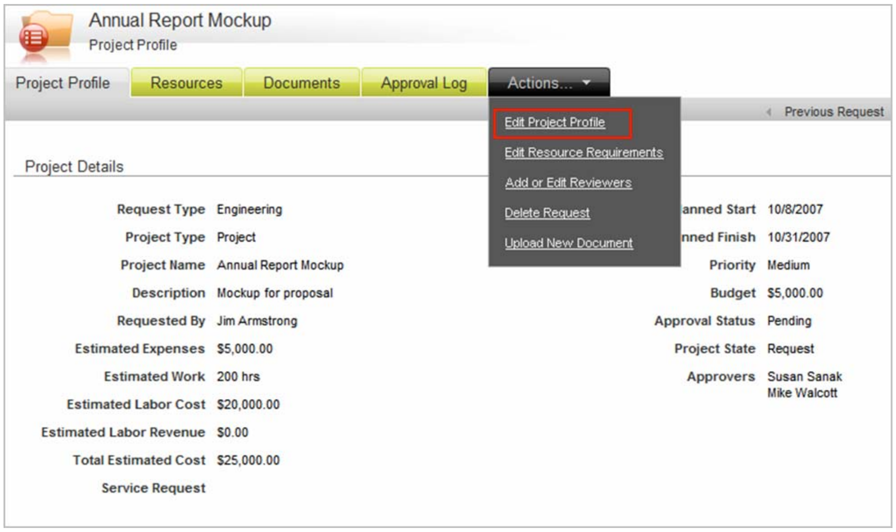
Select the request by clicking on the name to get to the details pop up window. Within the pop up window you have the opportunity to review the request and provide additional data before turning the request into a project. The core information fields are listed on the **Project Profile** tab.

Note: You may instead choose the actions icon to execute certain actions from the main screen.

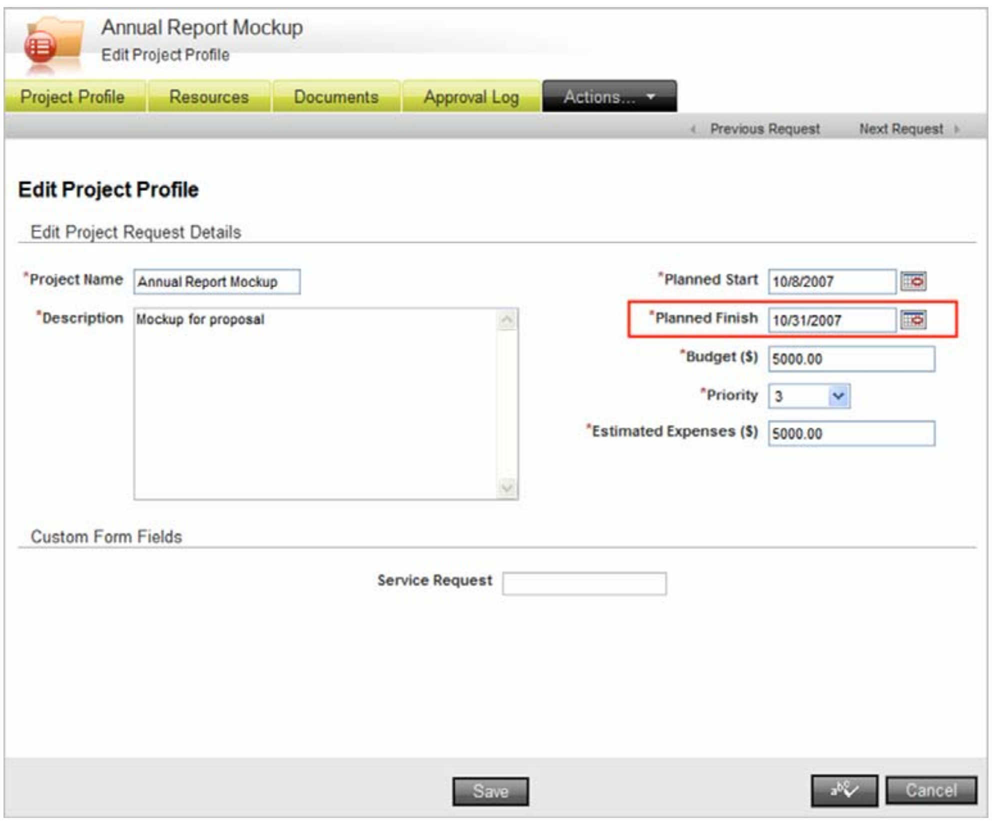


You may notice that there are additional fields than were originally included on the Request Form. It is possible to edit all fields and provide information in addition to what the requestor initially submitted. To edit the request, select **Edit Project Profile** from the **Actions** menu as illustrated below.

Note: Although the form we are working with is a request form, it is based upon the Project fields for the specific Project Type selected, and thus you will notice that some terminology is different. **Request Name** becomes **Project Name** but they are one in the same. This is why in the Actions menu it displays **Edit Project Profile** instead of **Edit Request Profile**.

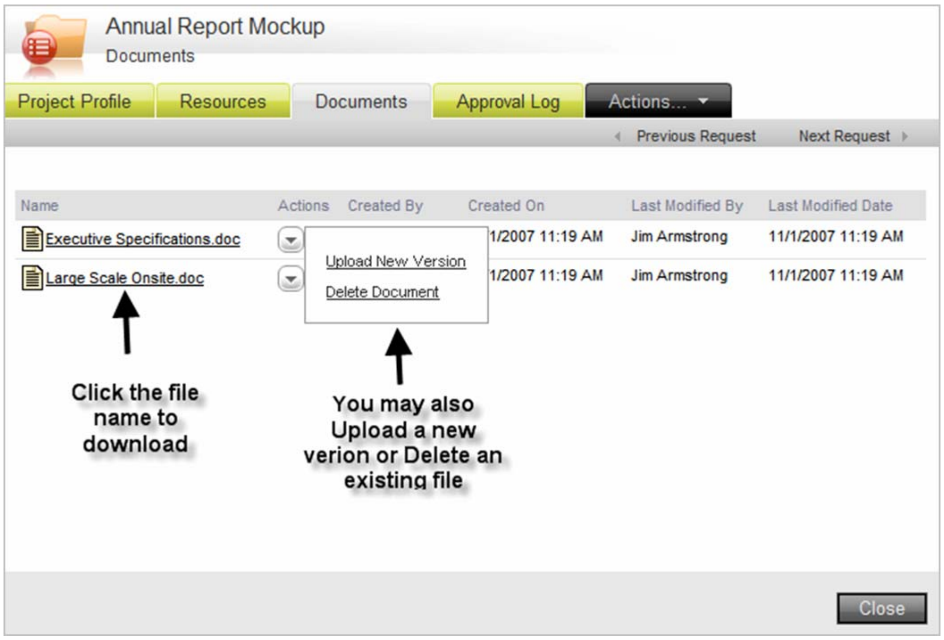


You can update any relevant fields after selecting **Edit Project Profile**. In the example above the requestor has indicated a finish date of February 4th, only estimating one month to complete the project. As the reviewer you are in a position to better estimate the length of time to complete and can change the dates at your discretion.



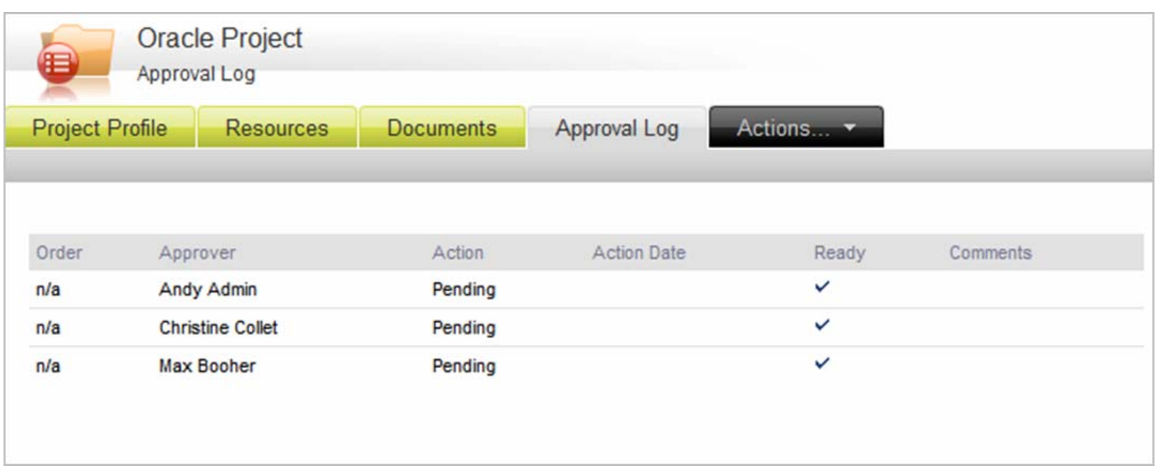
The Documents Tab

Any documentation the requestor attached can be downloaded from the **Documents** tab. To download or view a file, click the file name. It is possible to upload newer versions of the document or delete it altogether from the **Actions** menu.



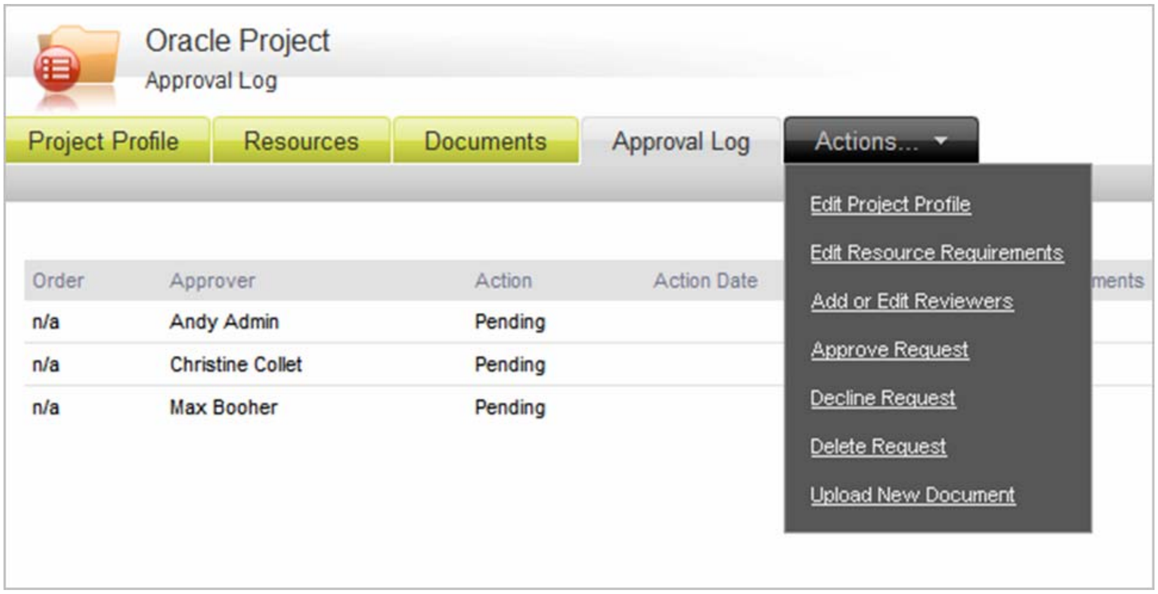
The Approval Log Tab

The **Approval Log** tab allows the approver to see a list of approvers if there is more than one. The approver is able to review the action that has been taken by the other approvers (pending, approved, and declined), when the action occurred and any comments that were made.



The Actions Tab

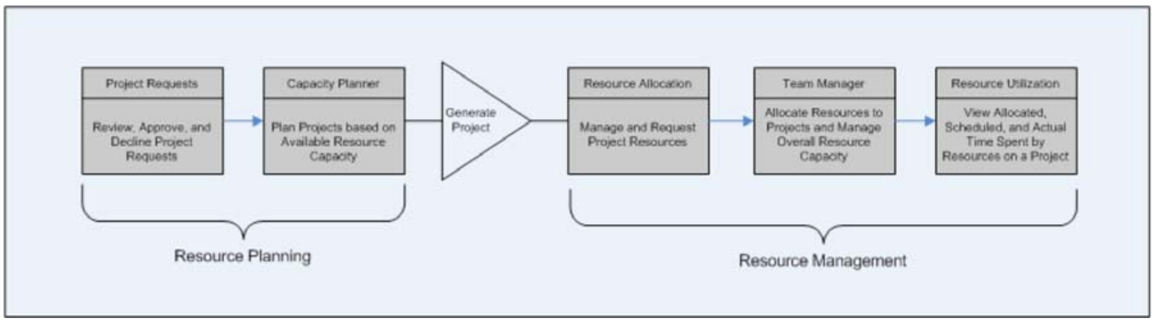
The **Actions** tab allows the approver to approve or decline the Project Request. The approver can also edit the project profile, edit resource assignments, add or edit reviewers, upload new documents, or delete the request.



Resource Planning and Management Overview

Daptiv PPM enables organizations to more effectively plan and track project resources through an integrated resource planning and management solution. The resource planning and management capability in Daptiv PPM encompasses several interdependent applications, starting with the **Project Requests** application, and carrying over to the **Capacity Planner**, the **Resource Allocation**, the **Team Manager**, and **Resource Utilization** applications.

The diagram below outlines the Resource Planning and Management process in Daptiv PPM:



The resource planning and management process follows these general steps:

- **Request a project**—Someone in your organization submits a Project Request. The Project Request includes information that your organization requires in order to evaluate requests. Once created, a Project Request is then evaluated by approval committee members and subject matter experts, with estimates made for work and resource requirements.
- **Evaluate and plan capacity**—Management and executives can use the Capacity Planner to view capacity and availability of resources based on project estimates. The Capacity Planner application provides an easy way for those making the project planning decisions to examine **what-if?** scenarios by shifting projects forward or backward in time in order to see how this impacts resource capacity.
- **Generate the project**—Once a request has been evaluated individually and within the context of your organization's other ongoing and proposed projects, the requested project is approved or declined and, if approved, the project is generated.
- **Request project resources**—At this point, the project manager can now use the Resource Allocation application to submit resource requests to resource managers in order to have resources allocated to their project. Additionally, project managers can use the Resource Allocation application to manage existing resource allocations for their project.
- **Approve/Decline resource requests**—Once Resource Requests are sent, resource managers can use the Team Manager application to allocate resources to projects, or decline the resource requests and notify requesting project managers of their actions. Resource Managers can also use the Team Manager application to manage the overall capacity of their team, and to reallocate or reassign resources as necessary.
- **View resource utilization**—Finally, both project managers and resource managers can use the Resource Utilization application to view allocated, scheduled, and actual time that resources are assigned to projects in order to most efficiently utilize the resources.

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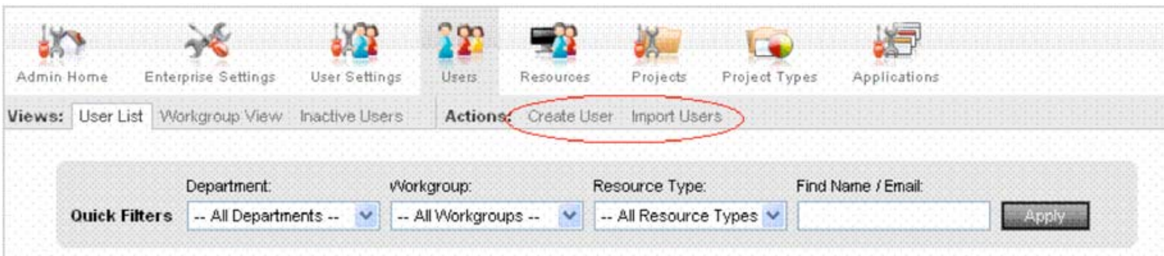
Resource Definition

Before resource planning can begin, both human and financial resources must be defined. In Daptiv PPM, resource definition involves: creating users billing rates, resource types, and associating users and billing rates with resource types.

Note: You may not have access to the Administration area of Daptiv PPM. This information is typically configured by your company's Daptiv PPM Administrator. This information is for reference only.

ADDING USERS, WORKWEEK CALENDARS, AND BILLING RATES:

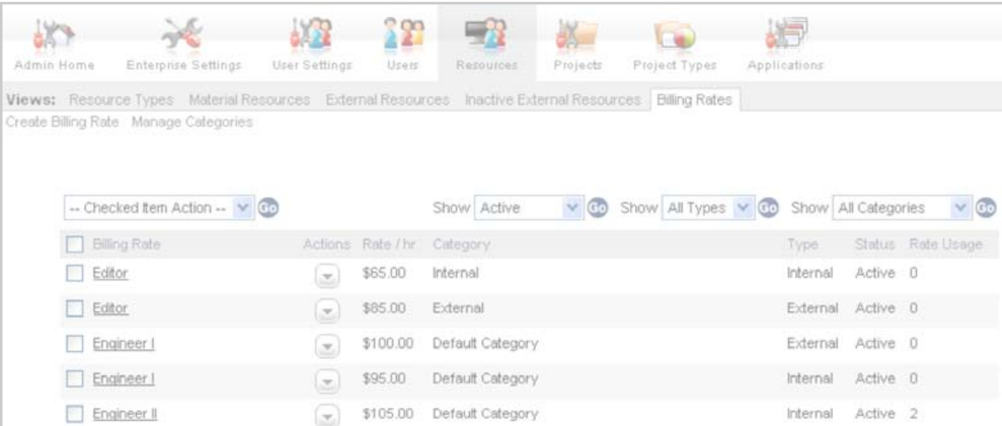
Daptiv PPM users are created or imported in the Administration area under **User List**.



When created, users are associated with a Workweek Calendar, which defines their capacity.

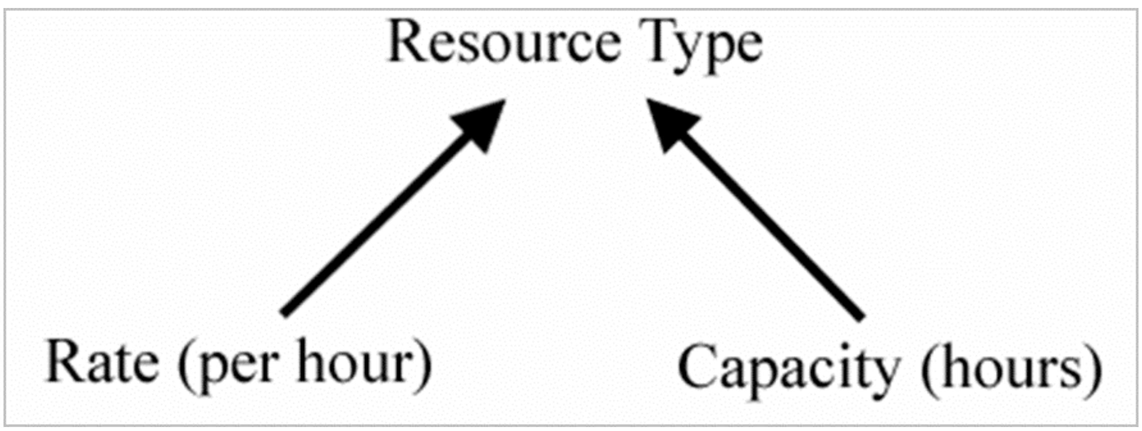
For financial capacity planning, you must also setup Internal Billing Rates. Internal Billing Rates define how much a certain type of resource costs the company per hour.

To setup Billing Rates, go to the **Resources** section in the Administration area.

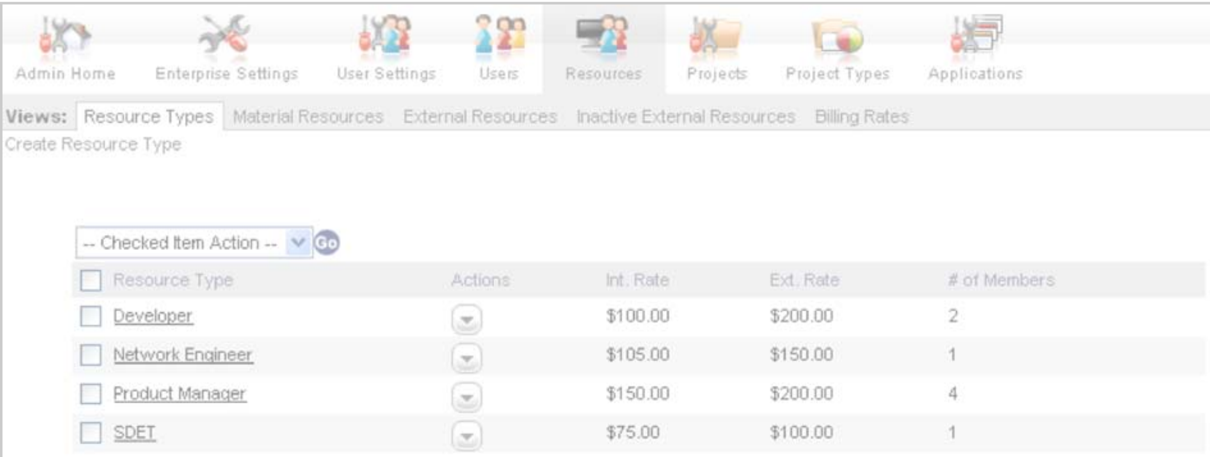


Resource Types

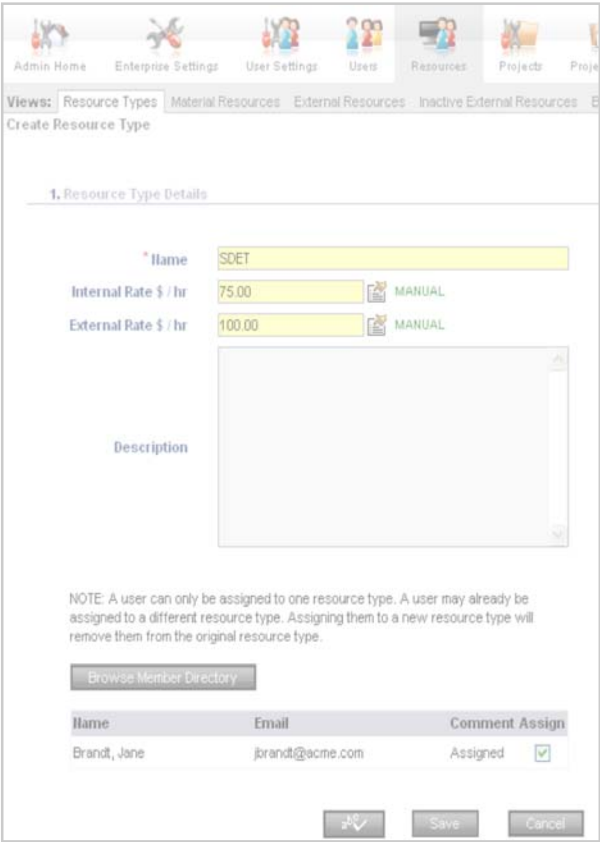
Resource Types are logical groupings of resources (users) that bring together a resource's capacity and hourly rate.



To create a Resource Type, go to the **Resources** section in the Administration area.



When creating a Resource Type, you should associate them with both internal and external rates billing rates.

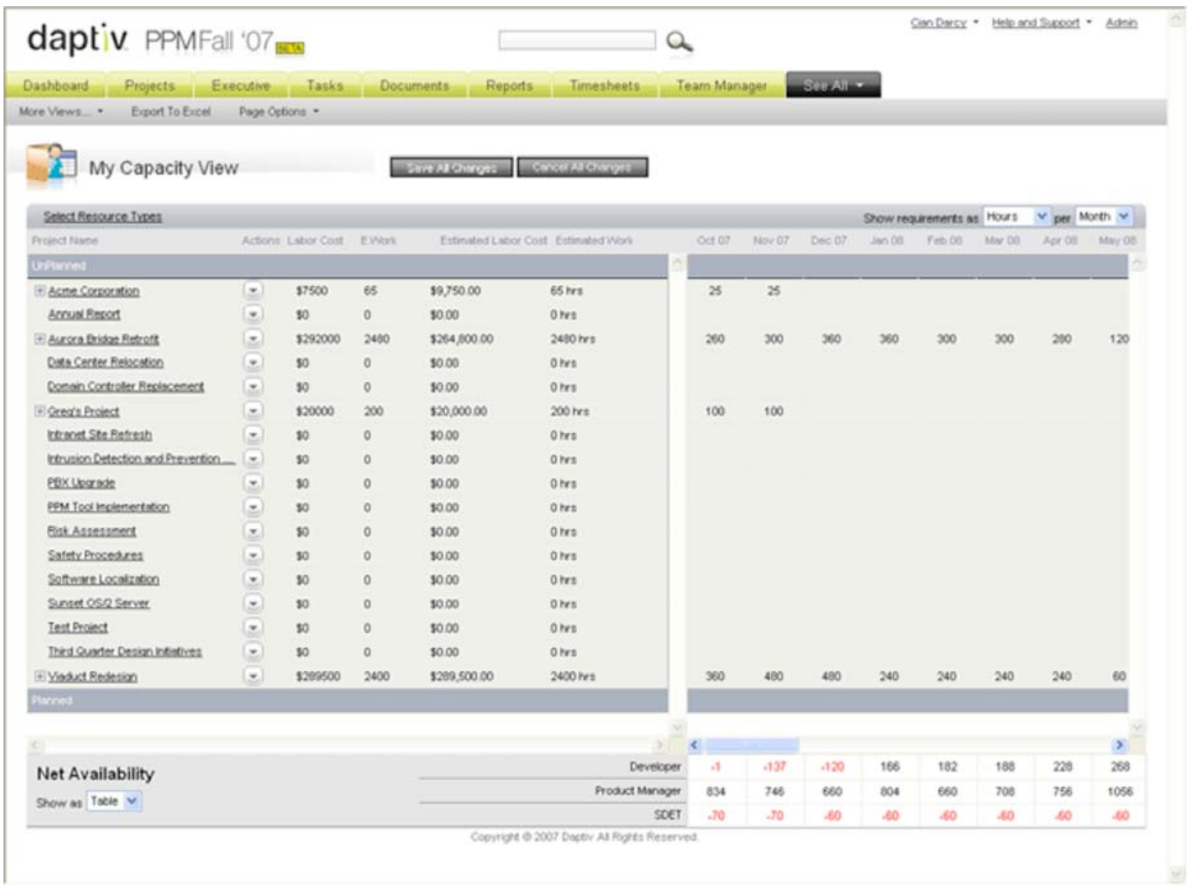


Capacity Planner Overview

The Capacity Planner application is a resource planning tool that provides an overview of existing projects, Project Requests, and associated Resource Requirements over time. Capacity Planner allows managers and Daptiv PPM users who are project approvers to compare requests and needs and to schedule projects when it is most appropriate given available resources and demands.

The display of the Capacity Planner is divided into **Unplanned Projects**, and **Planned Projects**.

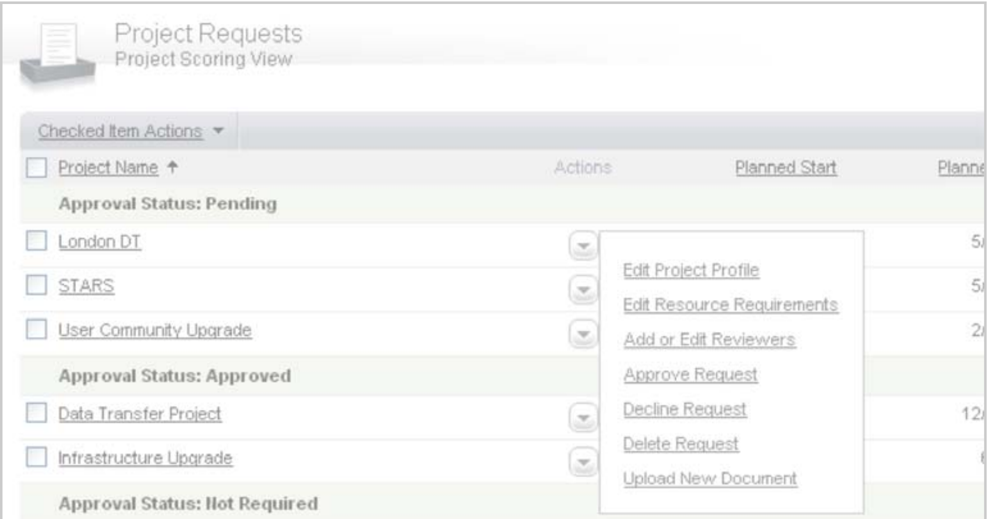
Note: Due to the large amount of information on the screen, the Capacity Planner page display may take longer than usual to refresh.



Two things feed the Capacity Planner:

1. Resource Requirements from Project Requests.
2. The Net Availability of Resource Types (based on the Workweek Calendar of each resource within a Resource Type).

Resource Requirements are typically created inside a Project Request by a project manager but can also be generated from within a project. (See Team Manager Overview within Daptiv PPM Online Help)



Tab Toolbar

The **Tab** toolbar gives users with adequate permissions the ability to switch between custom views, as well as to create, modify and delete views.

- **Save All Changes**—saves changes made to resource requirements or project start dates
- **Cancel All Changes**—reloads page, discarding any changes that have not been saved

Note: Any changes you make in Capacity Planner are limited to your local computer, until you click **Save All Changes**. When you click this button, the changes you have made are saved to the database. If you want to cancel your changes, click **Cancel All Changes**.

View toolbar

The **Select Resource Types** option on the View toolbar allows you to choose which resource types are included in the Net Availability summary at the bottom of the screen.

The View toolbar also provides you with the ability to toggle the requirements view between hours (or FTE – Full Time Equivalent) and cost, as well as between a monthly view and a weekly view.

Actions icon

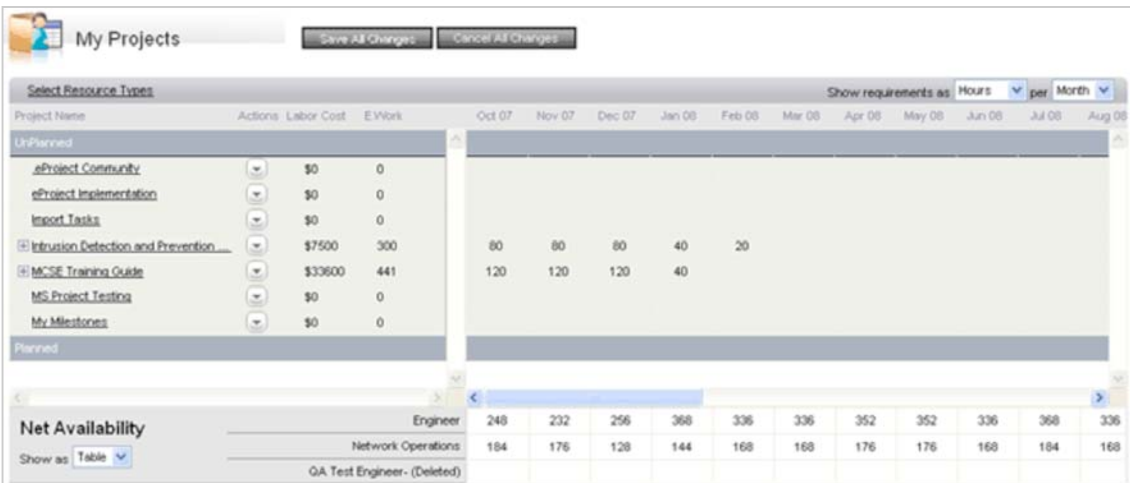
Actions icons next to each project give you the ability to:

- Hide a project from the Net Availability totals at the bottom of the screen—The **Toggle Net Availability** option hides or unhides a project from the Net Availability calculations.
- Switch a project between Unplanned and Planned—The **Set Capacity to Planned/Unplanned** option moves a project and its requirements from the Unplanned area to the Planned area and back.
- Edit the Project Requirements—The **Edit Requirements** option allows you to edit resource requirements for a project.
- Move the Requirements forward or back—The **Move forward one <Month/Week>** and **Move back one <Month/Week>** options allow you to shift requirements forward or back by one column.

Capacity Planner Display Overview

The Capacity Planner display is divided into 2 main areas:

- **Unplanned/Planned Projects**—The top of the display includes Unplanned projects and Planned projects, with the projects and resource types listed on the left side, and a grid of the resource requirements data over time on the right.
- **Net Availability**—The bottom of the display includes summary information, with the left side giving you the option to change how the summary information is shown, and the right side showing the summary information.



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Viewing Projects in Capacity Planner

The top of the Capacity Planner application lists unplanned projects, including any resource requirements and any estimated work associated with those requirements, and below these any planned project with their requirements and work.

Project Name	Actions	Labor Cost	E.Work	Estimated Labor Cost	Estimated Work
UnPlanned					
Aurora Bridge Retrofit		$292000	2480	$264,800.00	2480 hrs
Developer		$160000	1600		
Product Manager		$132000	880		
Data Center Relocation		$0	0	$0.00	0 hrs
Viaduct Redesign		$289500	2400	$289,500.00	2400 hrs
Planned					
Domain Controller Replacement		$0	0	$0.00	0 hrs
Third Quarter Design Initiatives		$0	0	$0.00	0 hrs
Test Project		$0	0	$0.00	0 hrs

Unplanned projects are those that still require additional preparation before they are completely planned. Planned projects are those whose parameters are fairly well determined. Planned projects are always included in the Capacity Planner display. Unplanned projects can be filtered using custom views.

Each project is listed along with any resource types. Clicking the plus (⊞) expands the list of resource types that the project requires. Action icons next to the project name and each resource type give you options including shifting requirements forward or back, toggling Net Availability, and editing the resource requirements.

The right side of the Projects list displays requirement hours (or cost) in a time line that extends from the current month or week (depending on the scale chosen) out 2 years beyond the last month or week of the pending Projects.

Oct 07	Nov 07	Dec 07	Jan 08	Feb 08	Mar 08	Apr 08
80	80	40	120			
80	80	40	120			
260	300	360	360	300	300	280
180	180	240	240	180	180	160
80	120	120	120	120	120	120
360	480	480	240	240	240	240
25	25					

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Exporting Capacity Planner Data to Excel

You can export data from the Capacity Planner to Excel. You might want to do this in order to work with the data off-line, or to take advantage of some of the capabilities of Excel.

TO EXPORT CAPACITY PLANNER DATA TO EXCEL:

1. Open the Capacity Planner Application
2. On the Tab toolbar, click Export to Excel.
   You are prompted to open the data in Excel or save an Excel file to your local computer.

Toggling Net Availability

In the Net Availability area of Capacity Planner summarizes total availability for each resource type in the Net Availability area of the display. Resource types used in both Planned and Unplanned projects are included in the summaries.

You can hide a project's resource type requirements from the Net Availability totals to help you determine how a project might impact resource availability. When a project's requirements are hidden, the lines are grayed, and their values are not included in the Net Availability calculations at the bottom of the screen.

When you toggle net availability, the **Save All Changes** button becomes active. Any changes you make in Capacity Planner are limited to your local computer, until you click **Save All Changes**. When you click this button, the changes you have made are saved to the database. To cancel your changes, click **Cancel All Changes**.

TO TOGGLE A PROJECT'S NET AVAILABILITY:

1. Open the Capacity Planner application.
   A list of projects displays, with unplanned projects above planned projects.
2. Click the Actions icon  next to a project whose net availability you want to hide, then select **Toggle Net Availability**.
   The resource requirements and estimated work and cost for the project are grayed, and the values are excluded from the Net Availability totals.

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Setting Capacity to Planned or Unplanned

The Capacity Planner groups projects as Unplanned and Planned. Unplanned projects appear at the top of the list of projects in the display while planned projects appear beneath them. Each group is clearly labeled, and both lists are included in the summary totals in the Net Availability area.

An unplanned project is a project that still requires planning. Unplanned projects can be excluded from the Capacity Planner by creating a custom view that does not include them. A planned project has its planning completed. Planned projects always display in Capacity Planner and cannot be excluded using custom views.

When you toggle net availability, the **Save All Changes** button becomes available. Any changes you make in Capacity Planner are limited to your local computer, until you click **Save All Changes**. When you click this button, the changes you have made are saved to the database. To cancel your changes, click **Cancel All Changes**.

TO TOGGLE A PROJECT'S CAPACITY FROM UNPLANNED TO PLANNED:

1. Open the Capacity Planner application.
   A list of projects displays, with unplanned projects above planned projects.
2. Click the Actions icon next to a project whose capacity you want to switch and select **Set Capacity to Planned/Unplanned**.
3. If the project was unplanned, it is changed to planned and moved down to the planned list. If a project was planned, it is changed to unplanned and moved up to the unplanned list.

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Editing Requirements in Capacity Planner

The Capacity Planner is designed to help you estimate your organization's capacity for taking on new and proposed projects. The Capacity Planner resource allocation is not tied to project schedules, so you can make changes to see how they might impact resource availability, without impacting existing projects or schedules.

To take advantage of this **what-if?** capability, Capacity Planner allows you to edit resource requirements.

When you edit requirements, the **Save All Changes** button becomes available. Any changes you make in Capacity Planner are limited to your local computer, until you click **Save All Changes**. When you click this button, the changes you have made are saved to the database. To cancel your changes, click **Cancel All Changes**.

TO EDIT A PROJECT'S REQUIREMENTS:

1. Open the Capacity Planner application.
   A list of projects displays, with unplanned projects above planned projects.
2. Next to the resource requirement you want to edit, click the Actions icon and select **Edit Requirement**. The requirement hours boxes become editable.

Note: If you select **Edit Requirements** for the project, you can edit all the requirements for that project.

3. Make any changes you want to make to the required hours for the resource type:

185	125	105	45	45	65
120	60	60	0	0	0
65	65	45	45	45	65

4. When you are finished, click **Save All Changes** to save the edits, or **Cancel All Changes** to cancel your edits.

Moving Requirements in Capacity Planner

To take advantage of the **what-if?** capability of Capacity Planner, you can move project requirements forward and back to see how this impacts availability of resources.

When you move requirements, the **Save All Changes** button becomes available. Any changes you make in Capacity Planner are limited to your local computer, until you click **Save All Changes**. When you click this button, the changes you have made are saved to the database. To cancel your changes, click **Cancel All Changes**.

TO MOVE A PROJECT'S REQUIREMENTS:

1. Open the Capacity Planner application.
   A list of projects displays, with unplanned projects above planned projects.
2. You can move requirements for an entire project, or by resource type:
   - To move requirements for an entire project, next to the project you want to move, click the Actions icon and select **Move forward one <Month/Week>** or **Move back one <Month/Week>**.
     The requirements are shifted either forward or back.
   - To move requirements for one resource type, next to the resource type you want to move, click the Actions icon and s**elect Move forward one <Month/Week> or Move back one <Month/Week>**.
     The requirements are shifted forward or back.
3. The totals in the Net Availability section are updated based on how requirements are shifted. This gives you an immediate and clear indication of how a project and its requirements is going to impact resource avai**lability, and helps you to ch**oos**e and schedule projects at** opportune times.
4. When you are done, click **Save All Changes** to save the changes, or **Cancel All Changes** to cancel your changes.

Any changes you make in Capacity Planner are limited to your local computer, until you click **Save All Changes**. When you click this button, the changes you have made are saved to the database. To cancel your changes, click **Cancel All Changes**.

Viewing Net Availability

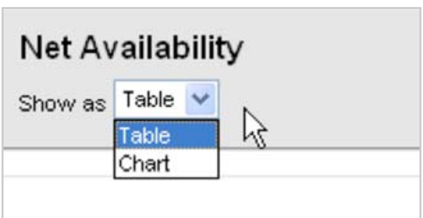
The Net Availability section of the Capacity Planner gives you summary information about the availability of various resource types, based on planned and unplanned projects.

Two options affect the values that appear in the Net Availability totals:

- **Selected resource types**—The resource types that are selected are those that get included in the Net Availability calculations. Resource types that are excluded are not totaled in Net Availability. Select resource types from the View toolbar. For more information, see Selecting Resource Types.
- **Unhidden Projects**—Projects whose resource requirements are not "hidden" from the Net Availability calculations are included in those calculations. Hide or unhide projects using the Actions icon. For more information, see Toggling Net Availability.

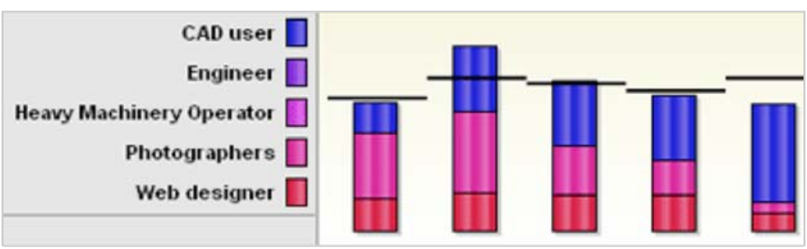
In addition, Net Availability totals are impacted by any applicable nonworking time. For more information, see About Personal Nonworking Times.

Net Availability is displayed as either a table (the default) or a chart. Switch between the two views using the **Show as** list.



In the table view, resource types from included projects are listed, along with their net availability based on the requirements specified in the upper half of the Capacity Planner. Negative availability is shown as negative numbers in red.

In the chart view, resource types from included projects are show in a bar chart, with one bar for each month or week shown. A bar represents the capacity demand for a given time period, and each resource type is indicated by a color-coded layer in the bar. A waterline mark indicates the total available capacity for each time slice.



Note: Resource types that are not selected are still listed in the chart legend but do not appear in the chart itself.

Selecting Resource Types

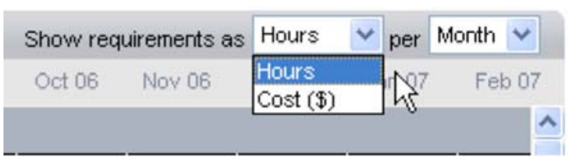
You can choose which resource types are included in the Net Availability section of the Capacity Planner using the View toolbar. The Select Resource Types option allows you to choose resource types to be included. The selections you make persist for as long as you are logged in to Daptiv PPM.

Click **Select Resource Types** to open a dialog box from which you select resource types to be included in the Net Availability section. The dialog box includes any resource type that is allocated in at least one of the Unplanned or Planned projects.

Note: Selections in the dialog box do not affect the resource types shown in the Unplanned/Planned section of Capacity Planner.

Changing the Requirements Display

The Capacity Planner View toolbar has two options allow you to change how project requirements display on the right side of the screen.



Use the View toolbar options to toggle:

- **Hours** (or **FTE**) and **Cost**—These toggle the display of information in the right side of the Capacity Planner from time units to cost units.

  An enterprise-wide setting determines whether you use Hours or FTE.

  This setting is configured by your Daptiv PPM administrator.

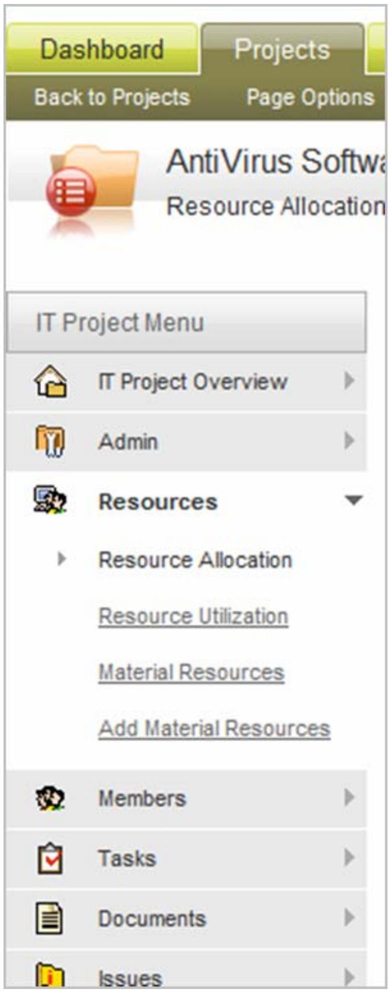
  Cost is defined as the amount of time (either hours or FTE) multiplied by the rate for a given resource type. If a resource type has no rate assigned to it, a rate of 0 is used, and the cost shown is 0 for that resource type.

  Resource types are defined by your Daptiv PPM administrator.

- **Month** and **Week**—These toggle the columns on the right side of the display from months to weeks. This option is unavailable if you have made changes that you have not yet saved or cancelled.

Flow from Resource Assignments into Team Manager

Resource Requirements are usually created for project requests by a Project Manager, however, these requirements can also be generated from within a project.



Once resource requirements have been submitted, a steering committee can use the Capacity Planner to assess the feasibility and timing of each request and/or project.

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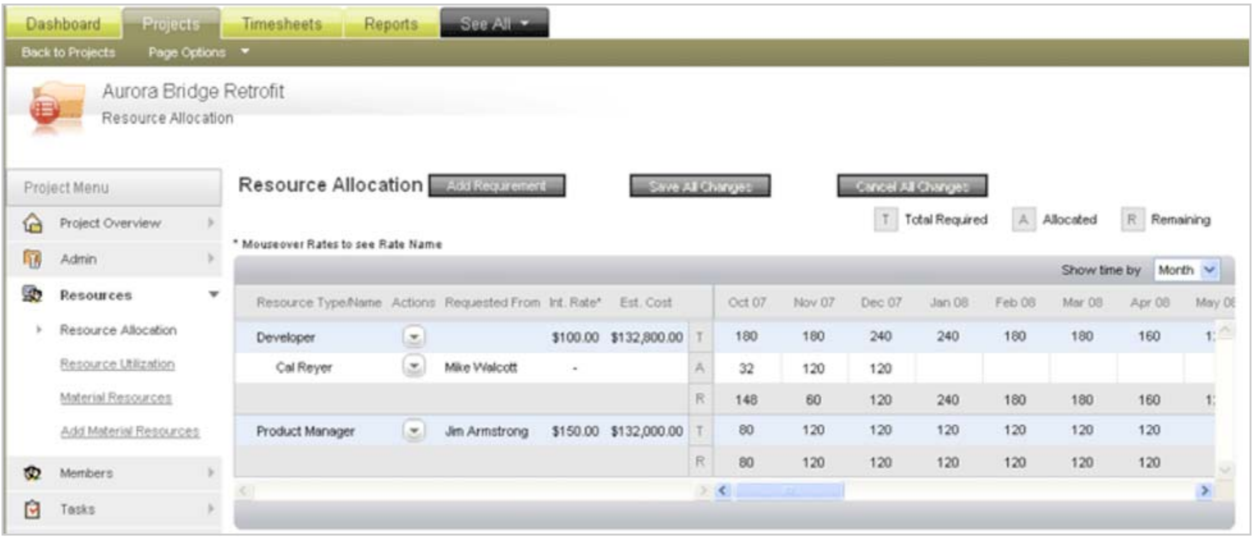
Resource Allocation Overview

The Resource Allocation application is one of the applications that combine to create the Resource Planning capability in Daptiv PPM.

Resource Allocation gives project managers a way to easily view and manage resource requirements for their projects.



In the Resource Allocation application, a project manager can add resource requirements based on the needs of the project. Once a requirement is added, the project manager can request resources to fill that requirement. A resource request is sent to the resource manager who can approve or decline the request.

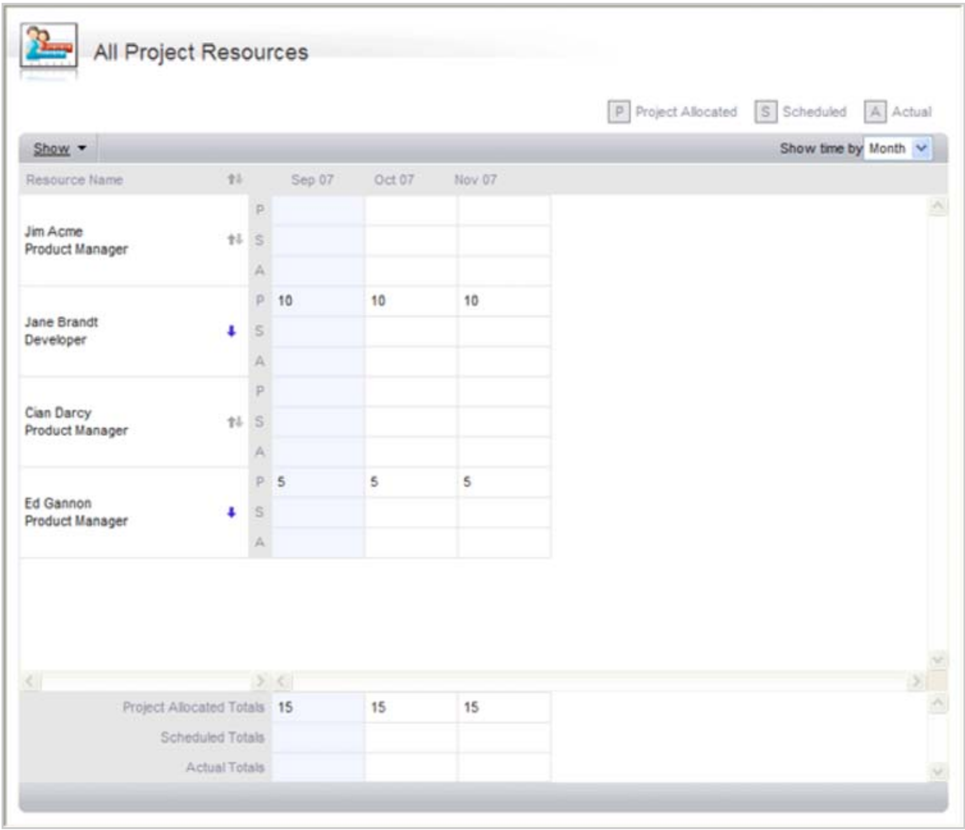
Billing Rates in Resource Allocation

Resource Allocation displays the internal and external billing rates for a resource type. These rates are used by Daptiv PPM for calculating costs and revenue for a project. Rates can be assigned at a resource level, at a resource requirement level, or at a resource type level. Where a rate comes from determines how it is displayed in the Resource Allocation application:

- When an external rate is set at the requirement level, the rate is displayed on the requirement line and the resources do not have rates listed.
- When a requirement has no assigned resources, rates from the resource type are displayed.
- When a requirement has assigned resources, rates from the resources are displayed, with totals shown.

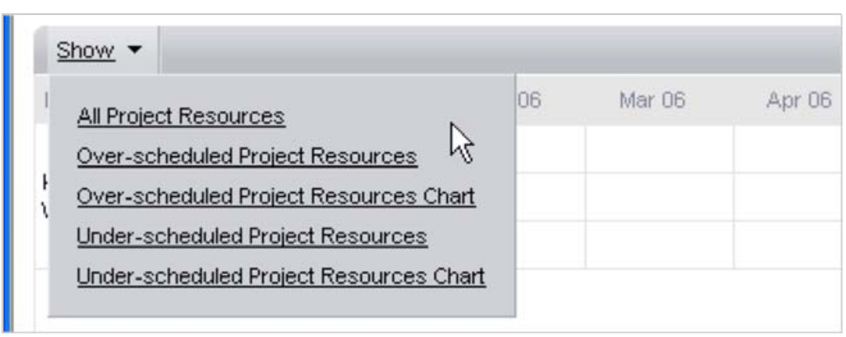
Resource Utilization Overview

The Resource Utilization pop-up window provides project managers and resource managers with a way to view allocated, scheduled and actual time resources spend on a project. This gives managers a way to reconcile planned resource utilization (allocated time) with actual resource assignments to project tasks (scheduled time).



The Resource Utilization pop-up window can be accessed from the project menu, or from the Team Manager application.

Use the **Show** menu to choose between the available views:



There are 5 different read-only views in Resource Utilization:

- **All Project Resources**—This is the default view and shows a grid of all the allocated project resources.
- **Over-scheduled Project Resources**—This view displays a grid with only those project resources whose scheduled time for the current project is more than their allocated time.
- **Over-scheduled Project Resources Chart**—This chart view shows those project resources whose scheduled time for the current Project is more than their allocated time.
- **Under-scheduled Resources**—This view displays a grid with only those project resources whose scheduled time for the current project is less than their allocated time.
- **Under-scheduled Project Resources Chart**—This chart view shows those project resources whose scheduled time for the current project is less than their allocated time.

Team Manager Overview

The **Team Manager** application gives resource (functional) managers a convenient way to see how the people they manage are being used. In addition, resource managers use the Team Manager application to approve or decline resource requests from project managers. Requests for resources are submitted to resource managers from the Resource Allocation application. For more information about resource allocation, see the Resource Allocation Overview section in this document.

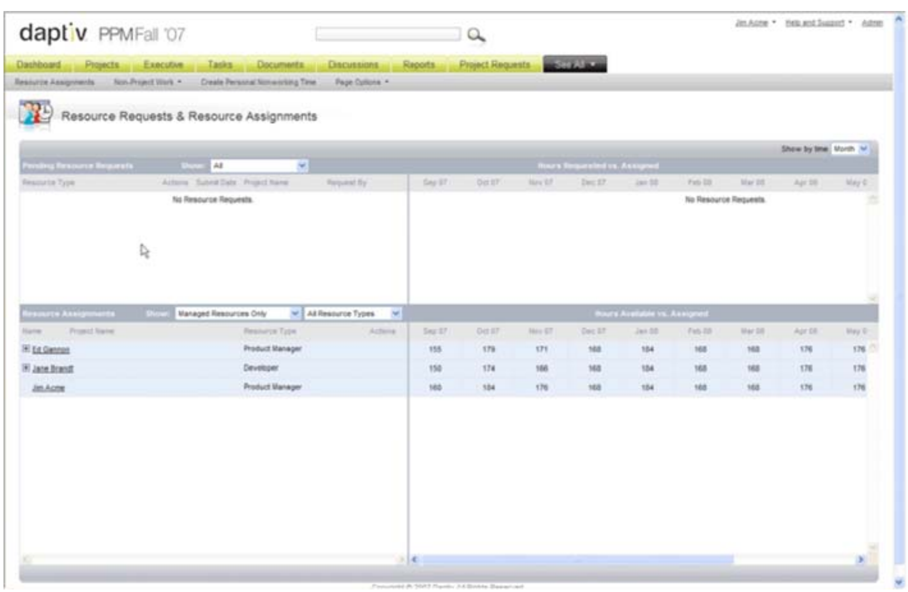
The Team Manager application is available by default to Daptiv PPM users with enterprise roles of Resource Manager, Executive, and Administrator.

The Team Manager application has two separate screens, the **Resource Assignments** screen, and the **Non-Project Work** screen. Use the links on the Tab toolbar to switch between the screens:

Click **Resource Assignments** to display the Resource Assignments screen.

- **Resource Assignments** (the default view)—Use this area to manage resource requests and resource assignments (including Nonworking Times).
- The Resource Assignments screen lists resource requests and assignments and allows you to manage the resources you are responsible for. For more information, see the About Resource Assignments in Team Manager section in this document.
- Click **Non-Project Work** and **View Non-Project Work** to display the Non-Project Work screen.
- **Non-Project Work**—Use this area to manage Non-Project work items.
- The **Non-Project Work** screen lists Non-Project work items and allows you to create, edit, and delete those items. For more information, see the About Non-Project Work and Creating Non-Project Work Items sections in this document.

You can also create personal nonworking time for users you manage by clicking **Create Personal Nonworking Time**. For more information, see the About Personal Nonworking Times section in the Daptiv PPM Online Help.



Resource Assignments

About Resource Assignments

The Resource Assignments screen in the **Team Manager** application gives resource (functional) managers a convenient way to see how the people they manage are being utilized. In addition, resource managers use the Team Manager application to approve or decline resource requests from project managers.

The **Resource Assignments** screen is divided into multiple sections including:

- **Resource Assignments** (the default view)—Use this area to manage resource requests and resource assignments.

  Use the **Show by time** list to switch the display between monthly increments and weekly increments.

  Use the **Show lists** to filter the display by resource types. The resource types available in the list are determined by the resource types your Daptiv PPM Administrator has defined.

- **Pending Resource Requests**—The upper section of Team Manager displays pending requests for resources the resource manager manages.

  Pending requests are resource requests the resource manager has not yet acted on. The resource manager should respond to resource requests as quickly as they are able, in order to limit the time the requesting project manager waits. Until a resource request has been responded to, the project manager cannot take additional action on those resources.

  Use the Actions icon next to a resource type to assign resources to the request or to decline the request.

  Click on the project name of a pending resource request to open a Project Profile window.

- **Resource Assignments**—The lower section of Team Manager lists all the resources for which the resource manager is responsible, along with any assignments for which they have been approved. The **Show** filter can be used to display resources you manage, supervise or both.

  This display provides the resource manager with information about the availability of each individual they manage, as well as showing any projects they are assigned to, and how much of their time is allocated to each assigned project.

  Click on the project name of a resource assignment to open the Resource Utilization by Resource window. For details about the Resource Utilization by Resource window, see the Resource Utilization by Resource View section in this document.

Assigning Resources in Team Manager

In the **Team Manager** application, you assign resources to projects based on resource requests from project managers. The Team Manager application lists any resources for which you are responsible as resource manager. (Resource managers are assigned to Daptiv PPM users by the Daptiv PPM Administrator.)

Note: When you assign a resource to a request and approve the request, the resource is added to the project (if they are not already a member) and given a project role. This project role is based on their enterprise role and on what the defined default project role is for that enterprise role and that project type. By default, enterprise roles do not have default project roles for each project type. This means that a resource added to a project from Team Manager may have no project role and will not be able to access the project until given a project role by the project manager.

TO ASSIGN RESOURCES IN TEAM MANAGER:

1. Open the Team Manager application.
   Any pending resource requests submitted to you are listed in the top half of the application.
2. For the resource request to which you want to assign resources, click the Actions icon next to the resource type and select **Assign Resources**.
   An editable line displays below the resource request.
3. Select a resource from the list of resources and type the hours the resource will be assigned to the project.

   As you type hours and move to the next cell, the requested hours for the resource type automatically update, showing the remaining hours requested. For example, if a project manager has requested 160 hours of a Developer resource type.

Resource Type	Actions	Submit Date	Project Name	Request By	Oct 07	Nov 07
⊟ Developer		10/17/2007	Intrusion Detecti...	Cian Darcy	120	40
Cian Darcy						

   You can assign a resource for 140 hours, the requested hours update to show the remaining hours of the request:

Resource Type	Actions	Submit Date	Project Name	Request By	Oct 07	Nov 07
⊟ Developer		10/17/2007	Intrusion Detecti...	Cian Darcy	20	0
Cian Darcy					100	40

   To assign another resource to the same request, repeat from Step 2.
   Each new resource you assign is added as the first line in the list of resources.
4. To remove a resource you have assigned, click the Actions icon next to the resource name and click **Remove Resource**.
   The resource is removed from the resource request and any hours that had been entered for the resource are added back to the requested hours.

   Note: Remove a resource this way before you have approved the request. If you have already approved the resource, see the Declining a Resource Assignment section in this document.

Once you are finished assigning resources to a resource request, you are ready to approve the resources.

Approving Resource Requests in Team Manager

Once you have assigned resources to a resource request, you need to approve the assignments before the requesting project manager is notified of your assignments.

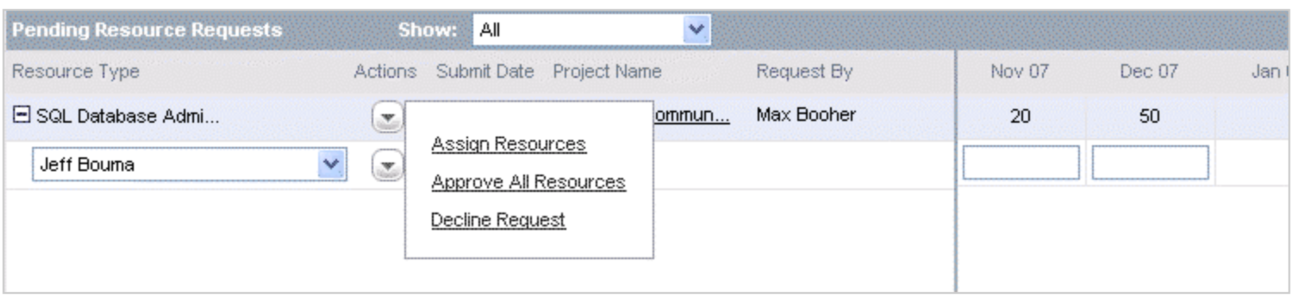
Note: You can only approve a resource request if you manage resources (if users have you assigned as their Resource Manager).

TO APPROVE RESOURCES:

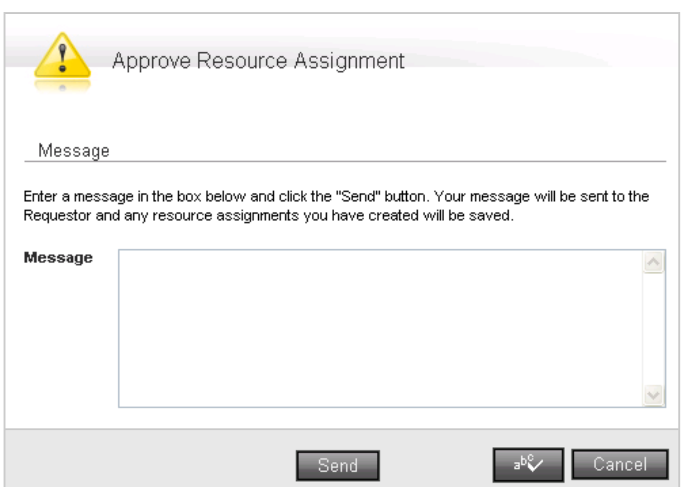
1. In the Team Manager Application, after you have assigned resources to a request, click the Actions icon next to the request and select **Approve All Resources**.

   The Approve Resource Assignment window opens.

   Note: The **Approve All Resources** option is only available after you have assigned at least one resource to a resource request.



2. In the **Message** box, type a message to be sent to the person who requested the resources.
3. Click **Send** to approve the resources you assigned and send the message to the requester.
   The resources you approved are moved to the bottom half of the screen, in the Assignments section.



The person who requested the resources receives a message telling them what you approved their request, and if the approval only satisfied part of their request, they can send a new request with the remaining hours to you or to another resource manager.

Each approved resource is listed by name in the bottom of the screen, along with their resource type and total available hours. Click the plus (⊞) next to a resource name to see the project(s) to which they are assigned, along with the hours they have been allocated.

Note: When you approve a resource request, the resource is added to the project (if they are not already a member) and given a project role. This project role is based on their enterprise role and on what the defined default project role is for that enterprise role and that project type. By default, enterprise roles do not have default project roles for each project type. This means that a resource added to a project from Team Manager may have no project role and will not be able to access the project until given a project role by the project manager.

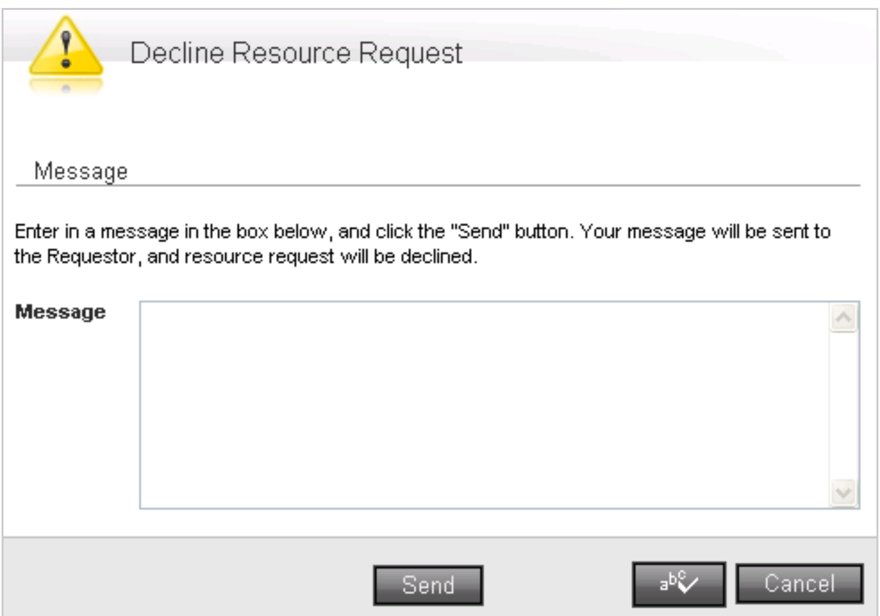
Declining Resource Requests in Team Manager

If you are unable to meet the resource request a project manager has sent to you, you can decline the request from the **Team Manager** application. This lets the requesting project manager know that you do not have the resources to satisfy the request, and gives the project manager an opportunity to request the resources from another resource manager.

Note: You can decline a resource request, even if you do not manage any resources (even if no users have you assigned as their Resource Manager). You can only approve a resource request if you manage resources.

TO DECLINE A RESOURCE REQUEST:

1. Open the Team Manager application.
   Resource requests that have been submitted to your are listed in the top half of the application.
2. For the resource type you want to decline resources, click the Actions icon next to the resource type and select **Decline Request**.
   The Decline Resource Request window opens.
3. Type a message to the requesting manager in the **Message** box.
4. Click **Send** to decline the request and send the message, or **Cancel** to close the window without declining the request.
   The request is removed from the Pending list of Team Manager and the requesting manager is notified of your action.



Declining a Resource Assignment

If you need to remove a resource from a project to which they are already assigned, you can do so from the Team Manager application.

TO DECLINE A RESOURCE ASSIGNMENT:

1. In the bottom of the Team Manager application, click the plus ( ) next to the resource name whose assignment you want to decline.
   A list of projects to which the resource is assigned opens.
2. Next to the project for which you want to decline the resource assignment, click the Actions icon and select **Decline Assignment**.
   The Decline Resource Request window opens.
   Note: You can also reallocate the assignment
3. Type a message to the requesting manager in the **Message** box.
4. Click **Send** to send the message and decline the assignment, or **Cancel** to close the window without declining the assignment.
   The assignment is removed from the Resource Assignments list of Team Manager, and the requesting manager is notified of your action.

Reallocating Resource Assignments

If necessary, you can reallocate resources even after you have approved an assignment. Reallocate resources by swapping the resources assigned to a project.

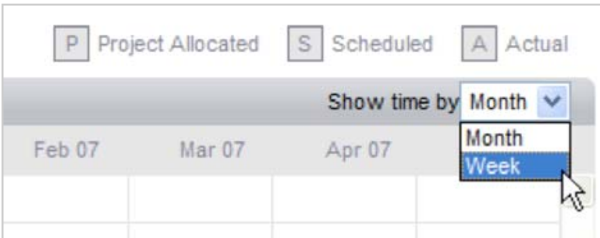
TO REALLOCATE RESOURCES:

1. In the bottom of the Team Manager application, click the plus ( ) next to the resource name you want to reallocate.
   A list of projects to which the resource is assigned opens.
2. Click the Actions icon next for the project assignment you want to reallocate and select **Reallocate**.
   The assignment is moved from the Resource Assignments section of the Team Manager application to the Pending Resource Requests area, with editable fields containing the hours the resource had been approved for the assignment.
3. Edit the resource request based on your needs:
   - To remove the resource entirely from the assignment, click the Actions icon next to the resource name and select **Remove Resource**.
   - To change the amount of hours **the resource i**s allocated to the assignment, edit the hours boxes, then click the Actions icon next to the resource type and select **Approve All Resources** to approve the chang**ed assignment.**
   - To add additional resources t**o the request, c**lick the Actions icon next to the resource type and click **Assign Resources**.
   - To decline the request entire**ly, click the Actions icon next t**o the resource type **and select Decline Request.**

Resource Utilization by Resource View

The Reso**urce Utilization by Re**source window di**splays utilization information** about an individual resource, providing their resource manager with quick access to information about how they are spending their time. The view includes total hours allocated for each project, hours scheduled for each project, and actual hours worked.

Use the **Show time by** list to change the display between a monthly view and a weekly view. Time is shown in either hours or FTE, depending on the PPM setting. The weekly view uses the first day of the work week as defined in the PPM work week settings. The time range for the display is determined by the project start and finish dates.



Each project is listed with:

- **Project Allocated Time**—The amount of time the resource has been approved for the project by a resource manager (indicated by a P).
- **Scheduled Time**—The amount of time the resource has been scheduled for project tasks by the project manager (indicated by an S).
- **Actual Time**—The amount of time the resource has spent working on specific project tasks (indicated by an A).

Project Name			Sep 06	Oct 06	Nov 06	Dec 06
		P				
Viaduct redesign	↑	S	32	152		
		A				
		P				
Studio Buildout	↑	S	5	13		
		A				

An arrow icon next to the resource name indicates if the resource is over-alloacted or under-allocated for the project. An over-allocated resource is shown with a red arrow pointing up and an under-allocated resource is shown with a blue, downward pointing arrow.

A summary section at the bottom of the window has totals for all listed Projects for Capacity, Total Project Allocated, Total Scheduled, Total Actual, Allocated Utilization, Scheduled Utilization, and Actual Utilization.

Capacity	168	176	176	168	184	160
Total Allocated						
Total Scheduled	50	165				
Total Actual						
Allocated Utilization						
Scheduled Utilization	30%	94%				
Actual Utilization						

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Non-Project Work

About Non-Project Work

Use the **Team Manager** application to create Non-Project work.

A resource manager or supervisor can create non-project work items to represent work required of team members that is not directly associated with any project the member is on. After creating non-project work items, the manager or supervisor assigns the items to users. Once the non- work items are assigned, those users can add the items to their timesheets and charge time against them. (Assigning a non-project work item does not result in the item automatically appearing in a user's timesheet.)

Examples of non-project work are "vacation", "internal training", and "internal system upgrade."

TO CREATE A NON-PROJECT WORK ITEM:

1. Open the **Team Manager** application.
2. Click **Non-Project Work** on the Tab toolbar and click **Create Non-Project Work**.
   A list of existing non-project work items displays.
3. Click **Create Non-Project Work** on the view toolbar.
   The Create Non-Project Work Item window opens.
4. Type a name for the non-project work item in the **Name** box.
5. Click **Browse Member Directory** to select users you want to assign to the new non-project work item.
   Note: Assigning a user to a non-project work item makes the item available for them to add to their timesheet. The item is not automatically added to any user's timesheet.
6. Click **Save & Close** to save the item and close the window, **Save & Add Another** to save the item and add another, or **Cancel** to close the window without creating the non-project work item.

Viewing Non-Project Work Items

Use the **Team Manager** application to view existing non-project work items.

A resource manager or supervisor can open the Non-Project Work view to see any existing non-project work items.

TO VIEW NON-PROJECT WORK ITEMS:

1. Open the **Team Manager** application.
2. Click **Non-Project Work** on the tab toolbar and click **View Non-Project Work**.
   A list of existing non-project work items displays.
3. From this list you can edit or delete non-project work items

Creating Non-Project Work Items

Use the **Team Manager** application to create non-project work.

A resource manager or supervisor can create non-project work items to represent work required of team members that is not directly associated with any project the member is on. After creating non-project work items, the manager or supervisor assigns the items to users. Once the non-project work items are assigned, those users can add the items to their timesheets and charge time against them. (Assigning a non-project work item does not result in the item automatically appearing in a user's timesheet.)

TO CREATE A NON-PROJECT WORK ITEM:

1. Open the **Team Manager** application.
2. Click **Non-Project Work** on the Tab toolbar and click **Create Non-Project Work**.
   A list of existing non-project work items displays.
3. Click **Create Non-Project Work** on the view toolbar.
   The Create Non-Project Work Item window opens.
4. Type a name for the non-project work item in the **Name** box.
5. Click **Browse Member Directory** to select users you want to assign to the new non-project work item.

   Note: Assigning a user to a non-project work item makes the item available for them to add to their timesheet. The item is not automatically added to any user's timesheet.
6. Click **Save & Close** to save the item and close the window, **Save & Add Another** to save the item and add another, or **Cancel** to close the window without creating the non-project work item.

Editing Non-Project Work Items

A resource manager or supervisor can edit non-project work items to add or remove assigned users, and to update the name of the item.

Note: Any changes you make to the item are reflected in user timesheets, including current timesheets.

TO EDIT A NON-PROJECT WORK ITEM:

1. Open the **Team Manager** application.
2. Click **Non-Project Work** on the Tab toolbar
   A list of existing non-project work items displays.
3. Click the Actions icon next to the item you want to edit, and click **Edit**.
   The **Edit Non-Project Work Item** window opens.
4. To change the name of the item, type the new name in the **Name** box.
5. To change the assigned users, click **Browse Member Directory** and add or remove assigned users.
   Note: Removing an assigned user will not remove the item from any of their existing timesheets. They will not be able to add the item to future timesheets.
6. Click **Save & Close** to save your edits to the item.

Assigning Non-Project Work

You need to assign a non-project work item to a user before that user can add the non-project work item to their timesheet and change time against it. Assign non-project work items to users when you create the non-project work items, or when you edit existing non-project work items.

TO ASSIGN A NON-PROJECT WORK ITEM:

1. Open the **Team Manager** Application.
2. Click **Non-Project Work** on the Tab toolbar
   A list of existing non-project work items displays.
3. The next step depends on if you are creating a new non-project work item you want to assign users to, or if you are assigning users to an existing non-project work item.

Deleting Non-Project Work Items

A resource manager or supervisor can delete non-project work items if they are no longer needed.

Note: If you delete a non-project work item that is being used on a current timesheet, the item is deleted from the timesheet and any hours charged against the item are discarded.

TO DELETE A NON-PROJECT WORK ITEM:

1. Open the **Team Manager** application.
2. Click **Non-Project Work** on the Tab toolbar
   A list of existing non-Project work items displays.
3. Click the Actions icon next to the item you want to edit, and click **Delete**.
   A confirmation message displays.
4. Click **Yes** to delete the item, or **No** to cancel the deletion.