



Capacity Planning

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Welcome aboard!

Capacity Planning is a visual and interactive workspace for top-down resource planning and forecasting. With Capacity Planning, you'll have a full picture of your organization's capacity versus demand, with full visibility into your team's availability, allowing you to more effectively plan and optimize resources across projects. You can:

- Use real-time data to analyze and optimize resource loads before making a commitment
- Create a streamlined process for requesting and approving resources
- Gain insights at a glance
- Get alerts to keep everyone informed when changes are made

Here are some tips to get you started with Capacity Planning.

Working in Sandbox

As early comers to Capacity Planning, you may start using Capacity Planning by request in a sandbox environment. Contact your Clarizen representative to enable Capacity Planning.

Continuous Development

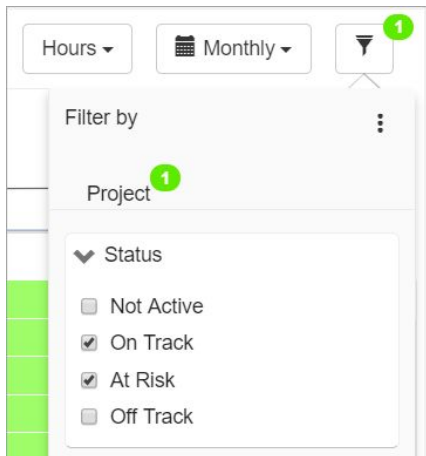
As Capacity Planning is a new module, we're improving it all the time. This means you may see changes in the interface and functionality during this initial phase, as we continue to enhance the features based on your feedback.

Latest Updates

May 20

The latest updates include the following user interface enhancements and functionality.

- A new Project filtering option lets you filter projects in your view by categories such as Status, Work Policy, etc. Click the filter icon to set filters.



- New Time-Frame options have been added to time-frame and resolution options, letting you select the *following # number of months/quarters/years*. For example: *In the following 2 quarters*.
- Project durations are now indicated with a blue line.

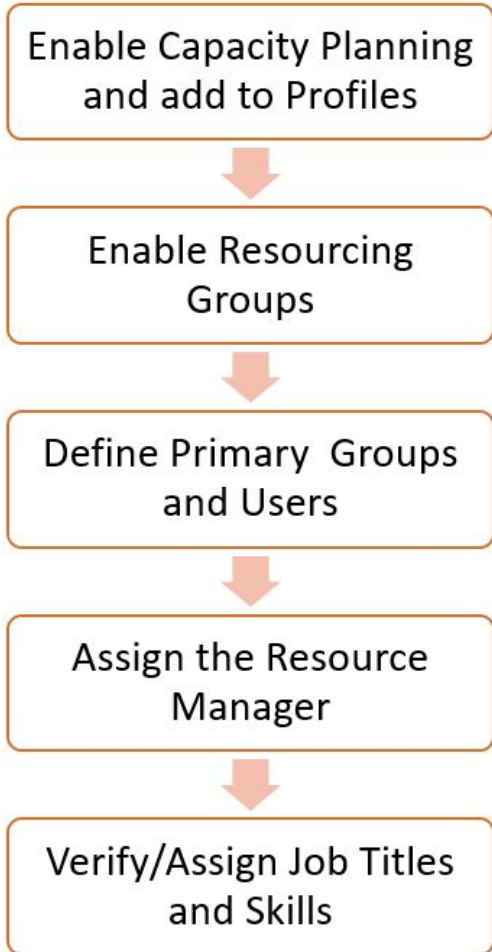
Mark As ▾	M01-2018 (JAN)	M02-2018 (FEB)	M03-2018 (MAR)	M04-2018 (APR)	M05-2018 (MAY)	M06-2018 (JUN)	M07-2018 (JUL)
▾ Demand	0	0	0	450.5	3.1k	8.4k	1.3k
> 10 Basic Project	-	-	-	10	1k	777	15
> 20 Museum New Wing ...	-	-	-	267.5	625	100	20
> 500 Free Road Enclave	-	-	-	45	350	7.5k	222
> 500 Transport Program ...	-	-	-	128	1.1k	100	1k

April 29

The latest updates include a new flexible request process lifecycle and user interface improvements.

- Approving resources is no longer mandatory, you can now skip ahead and assign resources directly to Projects
- Sort Projects by priority in the Demand panel
- The orange color for Partially Overloaded has been replaced with the following icon

Prepare your environment



To use Capacity Planning, make sure Resource Planning (System setting 8.7) and Capacity Planning (System setting 17.3) are enabled in Clarizen settings. Define which profiles will have access to Capacity Planning from the navigation panel.

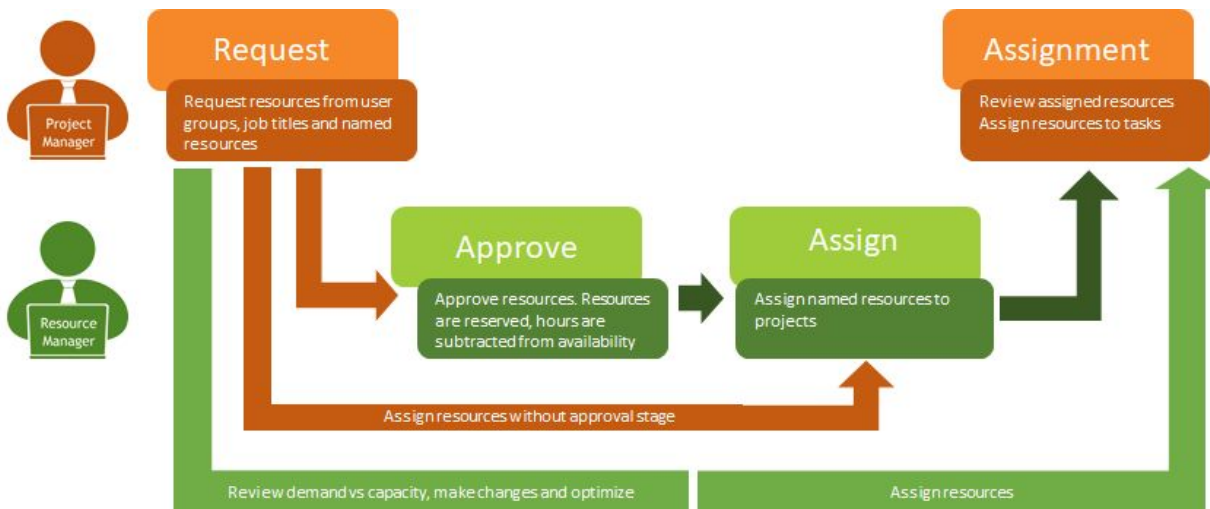
Define user groups as Resourcing Groups. Select the user groups to include in the Capacity Planning lifecycle. For example, select only user groups with Developers for your R&D projects, and leave out user groups and job titles related to Finance projects.

Define Primary users in Resourcing Groups. A user can belong to multiple user groups, however only one group can be used for resource assignment in Capacity Planning; this is the user's Primary group.

Assign the Resource Manager role to Resourcing Groups. The Resource Manager can approve and update requests, and assign named resources to projects. Note: Direct managers are Resource Managers by default.

If you are going to use job titles for resource assignments, verify all resources have been assigned a job title. When requesting or assigning resources, you can use Skills to easily identify the resources you need by skill set. If not yet defined, add one or more skills to resources.

The Lifecycle



The Capacity Planning lifecycle begins with requests for resources, and continues with approving requests and assigning named resources.

1. The **Project Manager** requests resources based on user groups, job titles or named resources, using a new Staffing Request panel in the Project's Resource Planning view.
2. The **Resource Manager** manages requests in the Capacity Planning module, which includes tools for top-down planning, forecasting and optimizing the resource load. These include visualizations that compare capacity and demand, which update on the fly during the optimization phase. The Resource Manager can:
 - Review capacity vs. demand
 - Optimize the resource load
 - Approve requests and then assign resources, or assign resources to Projects (skipping the approval step, depending on your preferred workflow). Once approved, resources are reserved and their hours are subtracted from their availability.
 - Assign resources. The Resource Manager selects resources based on availability. Once assigned, a project assignment is created.
3. With resources assigned to projects, the **Project Manager** can assign individual tasks to those resources.

Good to know...

Create projects ahead of time

Capacity Planning is all about planning ahead as well as updating active projects. Until now, you may have set up projects by way of requests, or on-the-fly as needed. To get the most from Capacity Planning, create your projects as soon as possible, for top-down resource planning and forecasting.

Divide the work

The Project Manager no longer assigns resources. Rather, the Project Manager requests resources and the Resource Manager approves them and assigns named resources to projects. The Project Manager can then assign those resources to tasks in the project.

We want to hear from you

We want to hear all about:

- Your experiences using the Staffing Request and Capacity Planning modules
- How the features work for you and your business processes
- What's missing?
- And anything else you want to share...

Questions?

Don't hesitate to contact your Customer Success Manager or Shelly Hen (Capacity Planning Product Manager) at shelley.hen@clarizen.com

Useful Links



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