Sopheon Accolade®

Managing Resources Training Guide

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About Sopheon Accolade®

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About the Accolade Education Program

This module is part of the Sopheon Accolade Education Program (AEP). The AEP modules are designed to help Accolade users perform the tasks in their company's business process using the Accolade application. The content in the modules is meant to be used side-by-side with the application, and is part of the overall documentation suite provided for Accolade.

The benefits of using Accolade as part of your company's innovation development process include the following:

- Reduced cycle time by displaying clear structure and visibility.
- Reduced rework through timely, properly sequenced completion of all key tasks and milestones.
- Assured positive user experience through properly developed product requirements.
- Improved communication by automating collaboration between multifunctional team members.
- Provided decision-making information. Poor projects are stopped or placed on hold so resources can be redirected to more promising and higher value projects and products.
- Provided clear project requirements. Expectations of a project team and project manager at each stage are clearly spelled out.
- Managed business risk. Break resource commitments into increments or stages.
- Established key baseline information and metrics.

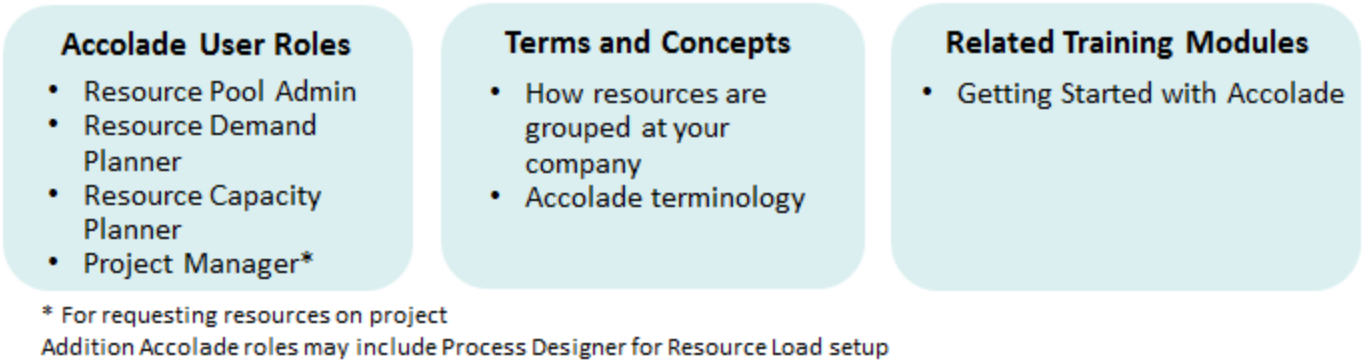
The Accolade documentation suite contains the following additional components:

Document	Contents
Sopheon Accolade What's New in This Release	For each release, review this document for an overview of the new features and changes within the release.
Accolade Online Help	Accessible directly through Accolade, the online Help provides comprehensive how-to and reference information about all aspects of using Accolade.
Sopheon Accolade Administrator's Guide	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
Sopheon Accolade Installation Guide	Provides information about the installation of the application and its required databases.
Dashboards for Accolade Installation Guide	Provides installation information for installing the Dashboards for Accolade component.
Quick Reference Cards	A PDF that can be printed double-sided that provides quick tips and navigation information for using Accolade.

Document	Contents
Online Help for Accolade Add-ins	Accolade add-ins, including Accolade Office Extensions, Accolade SmartDocuments for Google, Accolade SmartDocuments for Office, Accolade Portfolio Optimizer, and Accolade's integration with Microsoft Project, each include their own Sopheon created Help file accessible directly from the application after the add-in is installed. Each Help file describes how to use the features of that particular add-in.

Prerequisites for Using this Module

The contents of this training module assumes you are assigned the Accolade user roles and have a basic understanding of the terms and concepts listed below and how they are used in your installation. In addition, the content in the related training modules listed below may be helpful before reviewing the contents of this module.



Manage and Align Resources Overview

The optional Accolade Resource Planning component provides strategic resource allocation planning, integrating resource needs and availability into its overall portfolio management process.

Resource planning consists of the following components:

- **Resources** - Resources are either people or things whose assignment to projects is planned to ensure that the resources are distributed effectively. The resource plan is the list of resources needed for the next stage of a project. Resource plans and reports can be presented for approval at gate meetings.
- **Pools** - Resource pools are groups of similar types of resources. Each user resource can belong to only one pool. Administrators and Resource Pool Administrators can create and modify resource pools, including assigning each pool an owner (Resource Demand Planner) who assigns demand to its resources.
- **Demand** - Demand is the need for a resource and can exist in three types: requested, assigned, and approved. (Approved is an optional demand type that may not appear in your system, or in all areas of your system.) Demand types are determined by the role of the user who enters the demand. Project Managers request resources. Resource Demand Planners assign resources. Gatekeepers approve resource plans, and Process Managers record that approval within a project.

  When a Project Manager first adds a resource to a project's plan, it exists as a requested demand. When a Resource Demand Planner adds a resource, it exists as an assigned demand.
- **Capacity** - The total availability of a resource per time period.
- **Time Period** - Demand and capacity values are defined per time period. The length of a time period (weeks, months, quarters, or years) is defined in the Administration Console when Accolade is installed.
- **Demand Curve** - Demand curves are templates for the expected demand for a resource across all the stages of a project.

Access to Resource Functions

The full range of resource planning functionality requires the following resource planning roles in addition to the Administrator role, which has some resource planning rights. If security lists are in use, the correct security to assign to a user depends partly on the user's role. For example, pool administrators are constrained by security lists to create pools only within their scope of security while demand planners are not constrained by security if they own the pool.

The following roles control all resource planning functions:

- Resource Pool Administrator
- Resource Demand Planner
- Resource Capacity Planner

See the online Help to learn more about the user roles.

Users assigned the Administrator role also have the resource planning rights, including creating, editing, and deleting resource pools.

Resource Planning Process

After resource components such as pools, general resources, and demand curves are established, the following can occur:

- Resource Demand Planners can apply demand curves to projects to create estimates of demand need, for planning purposes.
- Resource Capacity Planners can edit capacity and unavailable times for resources in pools to which they have access.
- Resource Demand Planners can adjust demand on resources that have been added to projects and assign resources accordingly.
- Process Managers, Project Managers, Idea Managers, and Resource Demand Planners can enter demand directly for a project.
- Process Managers, Project Managers, and Idea Managers can enter a request directly on a deliverable or activity to create a demand.
- Document owners can request resources using documents they own.

Portfolio Optimizer

Accolade Portfolio Optimizer is a tool that Process Managers and other users with sufficient rights can use to analyze and manage the projects in their portfolio, including analyzing resource needs and availability, as they decide how to prioritize and schedule their projects.

Portfolio Optimizer enables managers to locate and manage resource bottlenecks and quickly gain a high-level understanding of resource usage across their portfolios. This tool does not enable managers to modify the resource requests and assignments made in Accolade, but can be used to make decisions that require Project Managers and Resource Demand Planners to change those assignments. For more information about using Portfolio Optimizer to optimize resource allocation, see the online Help available within the Portfolio Optimizer application.

Requesting Resources for Projects

Resource requests, also called resource demands, are part of the resource planning and allocation process. Project Managers and Process Managers with Manage Process rights can make requests for the resources required for a project, either by stage or across an entire project. Project Managers can request a general resource, for example, a chemist or a quality assurance expert, or can request that specific Accolade user be part of the project. Make requests in your company's chosen unit of measure for resources within a pool, for example, full time employee (FTE).

After a request for a resource is made, Resource Demand Planners, who are tasked with managing how resources are allocated across projects, assign resources to meet the requests, balancing the resource availability, both individually and pool-wide, against the demand on them from projects.

Project Managers can do the following:

- Request resources for a single project from within the project Resources page.
- Request resources for one or more projects using the Resource Requests page.
- Request resources using a document based on a Resource Plan template.

Request Resources from Within a Project

Project Managers can request resources for a project from within the project's Resources page. Users with access to the project can also use the Resources page to review the resource requests and allocations currently assigned to the project. Resources requested through the project pages are also available for review and modification within Resource Editor.

To request a resource from within a project:

1. Display a project and select the **Resources** page.
2. Do one of the following:
   - **To view a resource for a project stage** - In the **Plan For** field, select the specific stage.
   - **To view a resource for the entire project** - In the **Plan For** field, select **Project**.

   Pools with existing requested or assigned resources display. Click to expand the display and view the requested or assigned resources.

   On the project's Resources page, click the or icon next to a pool name to view the demand history of the resources in that pool. indicates that the Project Manager made the most recent change to requests for the pool. indicates that a Resource Demand Planner made the last change in the pool. Click **Mark the Pool as OK** to clear the notification, so any subsequent indicates a new change to resources for the project from the Resource Demand Planner.

3. In the **Pool** field, select the resource pool from which you want to request resources.

   You can request resources from any resource pool.

4. In the **Resource Availability** section, select the check boxes next to the resources you want to request.

   The **Resource Availability** section displays the resources within the pool, and the availability for each time period. If a resource displays a negative availability number, that resource is over allocated for that time period.

   Select general resources, such as Any Chemist or Any Quality Assurance Engineer, if you do not require a specific person but require specific expertise.

5. Click **Add to Resource Plan**.
6. Repeat steps 2-5 as necessary to add additional resource requests for your project.
7. For each resource in the **Resource Plan** section, enter the required demand for each time period for the project.
   - **To edit a single value** - Click a yellow shaded cell in a time period column and enter a value.
   - **To copy a value to multiple periods** - If the same value applies to multiple periods across the row, click in the cell and click or press **Shift +**. Enter the number of consecutive periods to copy the value to, and click **OK**. The value is copied to those periods, even if they are beyond the viewable area of the screen.
   - **To copy and paste a pattern of values from a spreadsheet** - Highlight the cells to be copied in your spreadsheet and press **CTRL+C**. Click into the project Resources page in Accolade, then click and drag to highlight the destination cells and press **CTRL+V** to insert the copied values.

     Note: In the project's Resources page, multiple cells can be copied from a spreadsheet and pasted into Accolade. In order to paste in correctly, the number of cells copied from the spreadsheet must match the number of highlighted destination cells in Accolade.

   You can request a partial demand, such as 0.50 full time employees (FTE).
8. Click **Apply** to save your changes.

Request Resources Using Resource Requests

Project Managers can request resources for projects that they manage using the Resources Requests page, which provides a means to request resources for multiple projects at a time.

To request resources for one or more projects using the Resource Requests page:

1. From the **Workspace** menu, select **Resource Requests**.
2. Display projects or demands and apply filters as necessary.

   Use the or options to expand or collapse a row or grouping. To expand or collapse all rows or groups displayed, use the and option in the table header.

On the Resource Requests page, the or icon next to the resource indicates the fulfillment status for the resource. indicates that the demand request is fulfilled. indicates that the demand request is not or is only partially fulfilled.

3. Click next to the project name for which you want to request a resource.
4. In the Add New Demands dialog box, select the resource(s) to request for the project in the **Available Resources** list, and the project to which to assign them in the **Available Projects** list.

   To view only the resources or projects that currently have no demands, select the **Restrict to No Demands** check box.

   To assign the selected resource(s) to multiple projects, select multiple projects in the **Available Projects** list. The project you clicked in is selected by default.

5. *(Optional)* To request duplicate resources for a resource/project combination, select the **Allow Duplicate Demands** check box.

   Leave this check box clear if you want to request demands for only the resource and project combinations that currently do not have demands allocated to them.

6. Click **OK** to display the requested resources in Resource Requests.
7. Repeat steps 2-6 as necessary to add additional resource requests for your projects.

   Once all resource requests are completed, use the icons and color shading on the page to help identify what requires your attention.

   - New requests display with and resource names or project names in bold (depending on how you are viewing information in Resource Requests).
   - Light blue shaded **Project** rows - Indicates requested demands.
   - Light green shaded **Project** rows - Indicates assigned demands.
   - Yellow shaded cells - In general, indicates areas of the page that you can edit, for example, the **Multiplier** cell. In addition, yellow shaded cells in **Project** rows indicate time periods that are within the project's timeline.
   - Light gray shaded cells - In **Project** rows, indicates time periods that are outside of the project's timeline. Gray shaded cells can be edited, but will not recalculate project dates based on resource changes.

Important! A project's timeline is defined by its start and end dates. If these dates are not defined, Accolade uses the first and/or last defined project gate dates to apply shading. If only one project date is defined, or the project does not have any dates defined, all time period cells will be shaded gray to indicate that the project's timeline is undefined.

   - White cells - Indicates cells that are view-only.

8. For each resource, enter the required demand for each time period for the project.
    - **To apply a demand curve** - Select the demand curve to be applied. This will automatically set the **Effective Period** to the current time period and will adjust the resource request's demand.
    - **To modify current and future demand curve resource values** - Enter a value in the **Multiplier** column that is larger or smaller than 1.00. The multiplier is applied to all values except those before the effective period.
    - **To edit a single value** - Click a yellow shaded cell in a time period column and enter a value.
    - **To copy a value to multiple periods** - If the same value applies to multiple periods across the row, click in the cell and click  or press **Shift +**. Enter the number of consecutive periods to copy the value to, and click **OK**. The value is copied to those periods, even if they are beyond the viewable area of the screen.
    - **To copy a pattern of values to a different range of cells in Accolade** - Click and drag to select a range of cells containing values, press **CTRL+C**, then click and drag to select a different range of cells and press **CTRL+V**.
    - **To copy and paste a pattern of values from a spreadsheet** - Highlight the cell to be copied in your spreadsheet and press **CTRL+C**. Click into the Resource Requests page in Accolade, then click to highlight the destination cell and press **CTRL+V** to insert the copied value.

      Note: From the Resource Requests page, only one cell at a time can be copied from the spreadsheet and pasted into Accolade.

     To enter comments about your requests, click  in the row and enter any information regarding your requests or modifications. Note that if Portfolio Optimizer is used to manage resources, comments are removed when resources are committed from Portfolio Optimizer back to Accolade.

9. Click **Apply** to save your changes.

Notes:

- To delete a request in the project Resources page, select the line in the **Resource Plan** section and click **Delete Entry**.
- To delete a request in Resource Requests, click  next to the requested resource under a project. Deleting a demand row deletes all demand assigned within that row, even if it is not visible in the displayed time period. The row is removed when you click **Apply**. Click **Reset** to undo the deletion prior to applying changes.
- When a project becomes inactive (through Close, Hold, or Kill actions), resources for the current and previous time periods will display as read-only on the project's Resources page, and future requested and assigned demands will not display on any resource page.

If a project becomes active again, the requested and assigned demand values will display from the current time period forward.

- The length of a time period within Resource Requests (weeks, months, quarters, or years) is defined in the Administration Console when Accolade is installed.

Requesting Resources Using Deliverables and Activities

Document owners can manage a project's resource plan using a deliverable or activity available in the project that is based on a Resource Plan template.

This topic describes the use of the simplest version of a resource plan template; however, Sopheon may have created a customized version of this template for use at your company. For detailed information about using a customized template, contact your Accolade administrator.

The most efficient way to use the basic resource plan template is for the Project Manager to add all the resources to the plan on the project's **Resources** page or through Resource Editor. Then, when the Document Owner downloads the document, the resources are already listed.

To request resources using a deliverable or activity:

1. Display the project and click the **Stages** page to display all deliverables and activities in the stage.
2. Identify the deliverable or activity that contains the resource plan and click to view all files available for download. Click to download the template and click if there is an existing version of the resource plan to modify.
3. If prompted, select the **Project Resource Plan** option to refresh resource data in the document.
4. In the **Date Range** field, select an item to refresh either the entire resource plan, future demands, or a specific date range of demands.
5. In the **From** and **To** lists, select dates in the enabled lists.
6. Click **Refresh** to overwrite the document with current data for the project

   Click **Do Not Refresh** to continue working with the data that was last saved in the document.
7. Enter amounts in the time period columns of the plan and do one of the following to save a published or unpublished version of the document to the project:
   - If you are using the Accolade Office Extensions add-in, save a version of the file back to Accolade using the **Save to Accolade** option in the application's menu.
   - Save a document version from within Accolade.

Add a Resource to the Plan

If you need to add a resource that the Project Manager has not yet added to the project, you can do so manually, but you must make sure that all the data (resource pool name, whether the pool is active, unit of measure, etc.) is correct. Enter a unique value in the **Custom Demand ID** column, but leave the **Demand ID** column empty.

Resource Pools Overview

Resource pools are groups of similar types of resources and are used to request and assign resources on a project. How your company defines the resource pools depends on how the company structure and resource planning process. For example, you may choose to define resource pools based on function and specialty, such as Engineers or Chemists, or based on geography, or a combination of both.

Consider the following when defining the resource pools for your organization:

- **Accolade Roles** - The roles and rights settings within Accolade determine what each user can and cannot do with resource pools. Administrators and Resource Pool Administrators can add, edit, and delete resource pools. Project Managers and Resource Demand Planners use resource pools in their requests and planning, but cannot define resource pools. If security lists are enabled, the Administrator can create or modify a pool with any security setting, but a Resource Pool Administrator can only create or modify pools that the Pool Administrator can access.
- **Pool Types** - Within Accolade, pool types are defined and identified by the demand type that is assigned to the pool. A pool can exist as a requested-only pool, as an assigned-only pool, both a requested pool and an assigned pool, or neither.

  If you choose, you can group resources in requested-only pools and into assigned-only pools (also called allocation pools). Requested pools typically contain only general resources, such as Any Chemist, Any Engineer in the USA, or Any Lab. These are generic pools that Project Managers can use to make demand requests for their projects. For example, Project Managers cannot make a request for a specific user resource for a project. However, as they are planning projects, they can indicate that they need one full time engineer for a project, based in a specific country. Assigned pools contain the actual resources that a Resource Demand Planner uses to create assigned demands for a demand request.
- **Pool Resources** - Pools can contain general resources, specific users, and system-generated resources. Typically, general resources are only used in requested pools. A user resource can belong to only one pool.
- **Pool Owners** - Resource Pools can exist with or without an owner. Owners are Resource Demand Planners or Resource Capacity Planners who can then assign demand to the resources within a pool. If an owner is assigned, only that owner can assign demand to the resources in the pool. If a pool does not have an owner, all Resource Demand Planners have access to the resources within the pool. Assign an owner to restrict who can assign demand to the resources within the pool.

A resource pool can have a primary owner and any number of additional, secondary owners. Assign additional owners to a resource pool if more than one Resource Demand Planner or Resource Capacity Planner has ownership of a pool. Assigning multiple owners to a resource pool allows planners to share their workload, as well as establish a backup owner during their absence. Additional owners on resource pools have the same capabilities as the primary pool owner.

- **Linked Pools** - Resource Pool Administrators can associate a requested-only pool with corresponding assigned-only pools, which allows Resource Demand Planners to know which group of resources they can assign to certain requests.
- **Automatically Calculating Capacity** - If you use request-only pools and relate them to assigned-only pools, ensure that the resource within the requested pool reflects the total capacity of the members in the related assigned-only pools. Auto calculating capacity for your pools helps Resource Capacity Planners keep capacities in sync without having to manually update the pool's capacity if a resource is added, deleted, or moved from an allocation pool.

Creating Resource Pools

Resource Pools are groups of similar resource types. Administrators and Resource Pool Administrators can create and modify resource pools, including assigning each pool an owner (Resource Demand Planner) who assigns demand to its resources. Resource pool types are defined and identified by the demand type that is assigned to the pool. How you group your resources into pools and how you manage your resource pools depends on the processes defined in your organization.

To create a resource pool:

1. From the **Resource** menu, select **Pools**.
2. Do one of the following:
   - **To add a new pool** - Click **Add Pool** in the upper right corner of the page.
   - **To edit an existing pool** - Click on the name of the pool to open it for editing.
3. Complete the following information to identify the pool:

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the resource pool.
Active	Select this check box if the pool is ready for use in resource planning. If you are building pools for future use, leave this check box clear.
Demand Type	Select the type of demand, requested, assigned, both, or none, for this pool to limit the pool's availability when creating new demands using the Resource Editor.

Field	Description
	When creating new demands using Resource Editor, Project Managers can only select resources from pools with a demand type of requested. These pools are considered planning pools and contain general resources. Demand Planners can only select resources from pools they own with the demand type of assigned. Assigned pools are allocation pools, and contain specific resources, such as employees. Both demand types are selected by default. If both options in the Demand Type field are left deselected, existing demands for that pool are still viewable in Resource Editor; however, new demands cannot be created using the pool.  Example You may want to limit Project Managers from requesting specific resources at your company, but allow them to select a general resource, such as Any Chemist or Any Engineer. Your Demand Planners can assign specific resources. You can limit the pools that your Project Managers see in Resource Editor when adding demands by creating resource pools and assigning them a demand type of requested. When a Project Manager adds a demand row in Resource Editor, they only see resource pools that include a demand type of requested.

4. Identify who can assign demand to the resources within a pool.

Field	Description
Owner	Click to select the primary Resource Demand Planner who owns and manages the pool. To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field. • Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights). • Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user. • Clicking the **Show advanced filters** check box displays or hides the additional filter options. • Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned.

Field	Description
	If a resource pool does not have an owner, any Resource Demand Planner can modify demands for the pool.
Additional Owners	Click **Select** and select any additional pool owners who own and can manage the pool. To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field. • Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights). • Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user. • Clicking the **Show advanced filters** check box displays or hides the additional filter options. • Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned. A resource pool can have a primary owner (selected in the **Owner** field above) and any number of additional secondary owners. Assign additional owners to a resource pool if more than one Resource Demand Planner or Resource Capacity Planner has ownership of a pool. Assigning multiple owners to a resource pool allows planners to share their workload, as well as establish a backup owner during their absence. Additional owners have the same capabilities as the primary pool owner.

5. Complete unit of measure and capacity options as appropriate for the pool.

Field	Description
Unit of Measure	Enter the units in which this resource is counted, such as FTE. Units of measure do not affect any calculations in Process Manager. However, if you are using Portfolio Optimizer to manage your project portfolio, there is an advantage to using the same unit of measure for all similar pools. Portfolio Optimizer will not show resource data unless all selected pools have the same unit of measure. See the Portfolio Optimizer online Help for more details.

Field	Description
Related Pools	If **Requested** is the only check box selected in the **Demand Type** field, click **Edit** to link this pool with one or more assigned-only resource pools. If links are already established, the pool names display in this field.
Auto Calculate Capacities for Resource	Ensure that you have added resources to the resource pool. If the pool is a requested-only pool (**Demand Type** set to **Requested** and not **Assigned**), select the resource (typically a general resource) within the pool that you want to ensure stays in synch with the capacity set for resources in the related assigned-only pool. If you have not related this pool to an assigned pool, this setting has no affect.  Example Your company uses request-only pools that are related to assigned-only pools that Resource Demand Planners use to assign resources. You have a request-only pool that your Project Managers use to request any engineer located in the USA. That pool contains a general resource called Any USA. The Any USA pool is related to the assigned-only allocation pool that contains all the engineers located in your USA-based office. You want to ensure that the capacity of the request-only pool stays in synch with the capacity of the engineers available for allocation. Selecting a resource from this list sets the resource to automatically derive its capacity from the total of the capacities of the resources in the related pools. Any time capacities change in the related pools, the capacity of this resource automatically recalculates accordingly.

6. In the **Function** field, select the default function used to assign a resource demand if an owner is not assigned to a deliverable or activity.

Note: The function option is only available for Assigned pools. Selecting a function adds a system-generated resource to the pool.

7. *(Optional)* Complete the additional information about the pool if necessary.

Field	Description
Security Lists	If security lists are in use, select items in every list to specify which Resource Demand Planners can access this pool if it is unowned. The Administrator can create or modify a pool with any security setting, but a Resource Pool Administrator can only create or modify pools that the Pool Administrator can access. The Resource Pool Administrator can only assign security to a pool that would be within the Pool Administrator's own scope of access. An Administrator can assign any item in a security list to a new pool.
Timesheet Approver	Select the user that approves all timesheets for resources within the pool. Only users assigned the Timesheet Approver user role are available for selection. If a pool does not have an assigned Timesheet Approver, timesheets for users within that pool are not sent through the timesheet approval process. This field is only available if your company uses the optional Time Tracking component. See the online Help for more information about Time Tracking.
Extended Fields	If one or more extended fields have been configured for resource pools, select the appropriate values for this pool. Fields are used to identify pool contents on the Resource Pools page and to filter the pools on the Resource Editor page. A multi-select list behaves like an OR filter in Resource Editor. Selecting any of the items that are selected for the pool displays the pool in the dialog box.

8. Click **Create** to create the new pool or **Apply** to save changes to an existing pool.

Notes:

- To delete a resource pool, click  next to the pool. You cannot delete a pool that has active demands associated with it (even if the value of the demand is **0**). A demand is active unless the previous gate decision was hold or kill, or the project is closed.
- Changing the function assigned in a pool does not modify any existing demands that used the default resource prior to making the change.

Linking Requested Resource Pools with Assigned Resource Pools

Resource Pool Administrators can associate a pool with a demand type set to requested-only with corresponding assigned pools. Establishing an association between a requested pool and an assigned pool allows Resource Demand Planners to know which group of resources they can assign to certain requests. You can only create links between pools with demand types of requested-only or assigned-only.

EXAMPLE Example

Your company has a planning pool for "All Engineers in the USA" that contains a single general resource called "All Engineers in the USA." Your company also has many allocation pools that group engineer types (Electrical in USA, Civil in USA, Mechanical in USA). When a Project Manager makes a request using the All Engineers in the USA pool, a Demand Planner needs to know which allocation pools can fulfill that request.

To link pools together, the pools must have the following characteristics:

- A requested-only pool can have only zero or one resource.
- A requested-only pool can have links to multiple assigned-only pools.
- An assigned-only pool can have only one link to a requested-only pool.
- Both the requested-only pool and the assigned-only pool must have the same unit of measure.

To create a link between resource pools:

1. From the **Resource** menu, select **Pools**.
2. Create a new request-only pool or click the name of the request-only pool you want to modify.
3. Ensure that **Requested** is the only check box selected in the **Demand Type** field.
4. In the **Related Pools** field, click **Edit** to display a list of available assigned-only pools.
5. Select one or more assigned-only pools and click **OK**.

   To filter the available pools list, select the extended fields in the **Filter by Pools** field. Only assigned-only pools matching those extended field definitions display in the **Available Pools** list.

6. Click **Create** to create a new pool or **Apply** to save changes to an existing pool.

Notes:

- To clear all links from a resource pool, display the pool and click **Clear** in the **Related Pools** field.
- After establishing a link between pools, you cannot change the unit of measure or the demand type without first removing the link between the pools.

- By default, an assigned-only pool can only be linked to one requested-only pool. If the **Allow Multiple Links For an Assigned Pool** system parameter is enabled, an assigned-only pool can be linked to more than one requested-only pool. Capacity calculations roll up to each parent, accordingly.

Adding Resources to Resource Pools

Resource pools are groups of similar types of resources and are used to request and assign resources on a project. Pools can consist of the following resource types:

- Specific Accolade users.
- General resources, such as Any Engineer, that are typically used for planning purposes. Generic resources typically do not apply to resource pools created only for time tracking purposes.

  You may want to do preliminary planning using generic (unspecified) resources. Later you can transfer generic demand to specific individuals when their availability becomes clear. Generic resources can also be set for resources such as labs. To create a generic resource, add a "General Resource" (non-user) resource to the pool. Give the resource a name such as "Any Chemist" or "Generic Engineer I".

  Depending on how you set up your preliminary plan, you may want to create more than one generic user. For example, you might create users to indicate different levels of experience, such as Chemist I, Chemist II, and so on. However, if you use Resource Planning and will be adding demand using demand curves, you should understand that demand curves can be applied to every resource in the pool.

  In the preliminary planning stage, you can add the generic resource to as many projects and time-periods as you need, without regard to availability. However, the availability numbers can be useful, showing you what your resource needs are for each type of resource.

  Then, as specific users schedules become clear, you can replace the generic resources with actual users shortly before they are needed.
- System-generated resources that are added automatically when a function is assigned to a resource pool. These resources are named after the pool. For example, Pool A Unassigned Resource.

Resource Pool Administrators can add resources to any pool that they can access. If security lists are not enabled, they can access every pool.

To add resource to a resource pool:

1. From the **Resource** menu, select **Pool Management**.
2. From the **Pool** list, select the pool to which you want to add a user.

   The Pool list contains only pools that you own.
3. Do one of the following:

- **To add a resource who is an Accolade user** - Click **Add User Resource**.
- **To add a resource that is not an Accolade user** - Click **Add General Resource**.

4. If you added an Accolade user, click **Select** in the new row and select the user you want to add.

   To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.

   - Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights).
   - Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.
   - Clicking the **Show advanced filters** check box displays or hides the additional filter options.
   - Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned.

   Users can belong to only one pool.

5. If you added a general resource, enter the name of the resource in the text box.

   A generic resource is only a name, and Accolade does not verify that the name is unique. However, it is best practice to not add generic resources with identical names to multiple pools.

6. Click **Apply** to save your changes.

Moving Resources to Different Pools

If a resource's position or responsibilities change, you may need to move the resource to a different resource pool. Resource Pool Administrators can move resources from any pool they own to any pool, regardless of ownership. If security lists for pools are enabled, the administrator must also have access to the pool through security. Existing demands move to the new pool with the resource.

To move a resource to a different pool:

1. From the **Resource** menu, select **Pool Management**.
2. In the **Pool** list, select the resource pool that contains the resource, and click the name of the resource you want to move.
3. In the **Pool** field select the new pool.
4. Click **Apply** to save your changes.

Notes:

- To remove a resource from a pool, display the pool's resource list, click next to the resource, and click **Remove from Pool**. You cannot remove system-generated resources from a pool; they are removed if a function is deleted and there are no demands assigned to the resource.

- To rename a general resource, display the pool's resource list, click the name of the resource you want to change, modify the name, and click **Apply**.
- If you use Resource Planning and are going to add demand to a resource using a demand curve, the curve shows demand on the entire pool. If the pool is only intended to be used for planning purposes, it only needs a single, general resource to represent the demand on the entire pool. That is, you would not create three resources named Chemist I, Chemist II, and Chemist III and create different demand curves for them if they were all in the same resource pool.
- If your company uses Portfolio Optimizer to manage resource availability, use the **Prefix for Generic Placeholder Resources** system parameter to prevent the individual resource icon ( ) for generic users from being displayed when demand is greater than capacity for a generic resource. Ensure that every generic resource has the same initial word or prefix at the beginning of the resource name (such as "Any Chemist").

Auto-Calculating Capacity for Request-Only Pools

If you use requested-only pools and relate them to assigned-only pools, you can ensure that the capacity for a single resource in the requested pool reflects the capacity of all the members in the related assigned pool. Auto-calculating capacity for a general resource in requested pools helps Resource Capacity Planners keep capacities in synch without having to manually update the requested pool's capacity when a resource is added, deleted, or moved from a related allocation pool.

Auto-calculations apply only to resource pools set as requested-only that are linked to assigned-only pools. If a request-only pool does not contain a resource for auto-calculation, Resource Capacity Planners can manually assign capacities within Resource Editor.

Capacity for the selected resource in a requested-only pool is re-calculated when any of the following system events occur:

- A resource is added or removed to a related assigned-only pool.
- A user resource in a related assigned-only pool is added, deactivated, or removed from Accolade.
- A related assigned-only pool is set to deactivated or activated.
- The capacity of a resource in a related assigned-only pool is manually changed.
- Related pools for a requested-only pool change.
- Resources in a related assigned-only pool are moved to a different pool.

To auto-calculate the capacity for a request-only pool:

1. Create a resource pool with a **Demand Type** set to **Requested** that is linked to at least one assigned-only pool.
2. Add resources to the request-only pool.

   Request-only pools are typically assigned only one general resource, such as Any Engineer.

3. From the **Resource** menu, select **Pools** and click on the name of the pool you want to modify.
4. In the **Auto Calculate Capacities for Resource** field, select the resource in the pool whose capacity you want to auto-calculate.

   You can select only one resource for auto-calculation.
5. Click **Apply** to save your changes.

Notes:

- When a requested-only pool is set for auto-calculation, capacities for that pool are read only, even for Resource Capacity Planners.
- Capacities are auto-calculated as you add or remove resources from a pool using the Capacities Importer or remove related pools using the Pools Importer. A resource can also be set to be the auto-calculated resource in a pool using the Resource Importer. See the online Help for information about importing project data.
- By default, an assigned-only pool can only be linked to one requested-only pool. If the **Allow Multiple Links For an Assigned Pool** system parameter is enabled, an assigned-only pool can be linked to more than one requested-only pool. Capacity calculations roll up to each parent, accordingly. With multiple parents, capacity may be over counted across the parent pools.

Exercises - Creating Resource Pools

Try out what you have learned!

- Create a resource pool, making the demand type **Requested**.
- Add one resource to the resource pool, making the resource an Accolade user.
- Create another resource pool, making the demand type **Assigned**.
- Link the requested resource pool with the assigned resource pool.

Resource Availability and Demand Overview

Resource demands address the planned allocation of available users and supporting resources (such as labs and other equipment) across multiple projects. In Accolade, Resource Capacity Planners define the capacity of resource, accounting for non-project related responsibilities and scheduled time away from the office. Resource Demand Planners schedule and assign resources to projects to meet resource demand requests from Project Managers and for general project needs. Resource Demand Planners may also need to adjust resource plans and allocation based on changes in resource capacity.

Note: You may be asked to select a location when you access Accolade. Your selection can restrict your access to projects and information to only those allowed to be viewed from that location. It is possible that you have access to information in one location that you do not have access to in another location. Restrictions are in place to ensure

your company's intellectual property is not in danger based on the laws and regulations in various countries.

Resource Demand Planners create plans for the resources in resource pools they own (and pools without owners) and can allocate resources to projects. Other users with access to the project can view the resources assigned to the project and the general resource plan for users.

Manage resources in the following locations:

- Resource Editor (recommended)
- Resource Planning Page
- Resources Page within the project

A resource plan is created for a project or a resource, or both, and is generated as a resource is requested or assigned to a project. Demand for resources can also be setup using a Demand Curve at the model level.

Gate Decisions and Resource Availability

If a project is placed on hold or is stopped, all resource demands, regardless of their status, for the project are made inactive and are not included in resource availability calculations. If the project is then taken off Hold (that is, returned to No Decision or Go), the resource demands are activated, and they are included in the calculations.

Resource Editor at a Glance

Resource Editor is a part of Resource Planning, an optional Accolade component. Resource Editor allows Resource Demand Planners, Resource Capacity Planners, and Project Managers a single place to assign and request resource demands and set capacity. The page includes several visual indications using colors and icons to help navigate through the page and to determine which demands are new, and those that still require allocation.

Your user role determines how you access Resource Editor and the content that is available within it:

- Project Managers and Idea Managers access Resource Editor from the **Project > Resource Requests** menu. The page displays all projects that the Project Manager or Idea Manager owns, and all resources currently assigned to the project.

  If you are a Project Manager or Idea Manager, when you open **Resource Requests** from the **Workspace** menu, you can create resource demand requests for any resource for your projects. Any assigned demands for a project are read only.
- Resource Demand Planners and Resource Capacity Planners access Resource Editor from the **Resource** menu. The page initially displays with no resources or projects shown.

General Navigation

To display resources or projects, use the **Show** buttons in the top left corner of the page to filter what displays in Resource Editor.

- Click **Show Projects** to select the projects to display. This is helpful if you only want to see the resource demands for single project or for multiple projects at once. Displays if the **View** is set to **By Project**. If the **View** is set to **By Resource**, **Show Resources** displays in the top left corner.
- Click **Show Demands** to select resources or projects that currently have demands (either requested or assigned). This is helpful if you want to see the demands for specific resources and projects. Use the filter options to filter the list of resources by pool, users, project, or portfolio. Resource Demand Planners who access Resource Editor from the **Resources** menu can also select **Show Resources** to select the resources to display, regardless of their existing demands. This option is helpful for Resource Demand Planners who only want to view who is currently allocated demands and who is not, or when creating a resource plan for a single resource.

Color Indications

Resource Editor uses color shading to help identify what requires your attention on the page:

- Tan shaded cells - These cells are visible when the Resource Editor is viewed **By Resource**, and indicate the overall capacity for a resource. The cells are editable by Resource Demand Planners who also have the Resource Capacity Planner user role.

  Note: Project Managers do not see the Capacity rows. Instead they see net capacity calculations for each resource. See "Resource Editor Net Capacity Resource Calculations" on page 36 for more information about net capacity and how it is calculated on the Resource Editor page.

- Light blue shaded **Project** rows - Indicates requested demands.
- Light green shaded **Project** rows - Indicates assigned demands.
- Yellow shaded cells - In general, indicates areas of the page that you can edit, for example, the **Multiplier** cell. In addition, yellow shaded cells in **Project** rows indicate time periods that are within the project's timeline.
- Light gray shaded cells - In **Project** rows, indicates time periods that are outside of the project's timeline. Gray shaded cells can be edited, but will not recalculate project dates based on resource changes.

  Important! A project's timeline is defined by its start and end dates. If these dates are not defined, Accolade uses the first and/or last defined project gate dates to apply shading. If only one project date is defined, or the project does not have any dates defined, all time period cells will be shaded gray to indicate that the project's timeline is undefined.

- White cells - Indicates cells that are view-only.

Icons and Links

Resource Editor contains a number of icons that you can click to display more information or to add or delete demands and comments:

- - Opens the Add New Demands dialog box to request or assign a demand.
- / - Expands or collapses a row or grouping. To expand or collapse all rows or groups displayed, use the and option in the table header.
- - Adds an assigned demand that is allocated to the requested demand.
- - Copies a demand or capacity value to the specified number of consecutive periods across a row, even if they are beyond the viewable area of the screen. You can also use **Shift +** to duplicate values.
- - Displays comments about why you are adding or editing a demand. Notes are saved when you click **Apply**.
- - Marks the demand row for deletion. Deleted rows are removed when you click **Apply**.
- - Undoes a pending row deletion.
- Project name link - Displays project information, gate dates, and metrics.

Resource Editor also includes visual indicators to help you identify new, blank demand rows:

- - Indicates a new demand row, and any demand row that currently has no demand value or demand curve assigned. Project names and resource names for these demand rows display in bold type.

  These demand rows continue to display in bold with until demand values are assigned. or a demand curve is selected.
- - Indicates an edit to an existing row since you last clicked **Apply** in Resource Editor. Use this indicator to review existing demand rows to which you have made edits prior to clicking **Apply**. This indicator does not apply to the changes in capacity.

Security lists, if enabled, control access to project information. If you do not have access to a project, you can still create demand rows for that request; however, you cannot access any of the project information. "Hidden" and a project code displays instead of the project name for these projects in all locations in Resource Editor by default. The **Allow Restricted Names to be Visible** parameter determines whether project names are visible to users who do not have access to a project. An Administrator must set the parameter to **1** for the project names to display throughout Resource Editor regardless of security.

Additional Options in Resource Editor

Use the following options in the upper right corner of the page to customize the view and provide additional information to complete your tasks within the editor.

- Click  to select metrics to be used as filter or sort options when displaying projects, resources, and demands on the page.

  Select one or more metrics in the available list, then select the metric and its value to be applied in the **Filter** or **Sort** drop-down fields. Click  or  to add or remove options as necessary.

  Only metrics defined as Available to Resource Editor are available for selection.

   Click the **Show** check box to display the metric value within the view. Up to five metrics can be displayed in the view, and they do not have to be used as a filter or sort option in order to display the metric value within the view.

- Use the  option to select whether to organize the information by project, by resource, or by resource grouped by pool, in order to assign demands and capacity values for pools that you own. Grouping by pool also provides a total pool capacity calculation.
- Use the  and  options to show or hide the rows and columns described below:
  - **Totals** - When displayed, shows or hides the **Overall Total** and **Visible Total** columns that display the total requested demands and total assigned demands relative to the resource or the project (depending on how you have sorted information) in the time period. As a Demand Planner, use the information in these two columns to help ensure that your assigned demands equal those the requested demands. As a Project Manager, you can use this information to determine if you have received assigned demands for the requests that you have made.

    Note: On a requested demand, the  or  icon next to the resource indicates the fulfillment status for the resource.  indicates that the demand request is fulfilled.  indicates that the demand request is not or is only partially fulfilled. Hovering over the **Overall Total** cell will show the number of unfulfilled periods.

  - **Demand Type** - When displayed, shows or hides the type of demand, requested or assigned. Requested demands display highlighted in light blue and assigned demands display highlighted in light green.
  - **Effective Period** - When displayed, shows or hides the effective starting period of the demand curve being applied to the assigned demand.
  - **Demand Curve** - When displayed, shows or hides the demand curve column. See "Applying Resource Demand Curves" on page 41 for more information about how applying demand curves affects resource planning.
  - **Multiplier** - When displayed, shows or hides the multiplier column.
  - **Net Allocation** - When displayed, shows or hides the total assigned demand that is linked to a requested demand. Use this option to help identify the requested demands that are currently over or under allocated.
  - **Net Capacity** - When displayed, shows or hides the total remaining capacity for the resource in the By Project view. See "Resource Editor Net Capacity Resource Calculations" on page 36 for more information about net capacity and how it is calculated on the Resource Editor page.

- **Empty Rows** - Shows or hides rows that have no demand within the currently display time period range. Because the empty rows can change day to day, if you change the time period you are viewing within the editor, this option is selected again to display the empty rows. For the same reason, your selection is not saved when you exit Resource Editor. When you return to the editor, the empty rows are selected to display.

Your selections are saved and applied the next time you open Resource Editor from the same location. For example, if you select display options when you accessed the editor from the **Resource** menu, those same settings are applied the next time you open the editor from the **Resource** menu.

Notes:

- When a project becomes inactive (through Close, Hold, or Kill actions), resources for the current and previous time periods will display as read-only on the project's Resources page, and future requested and assigned demands will not display on any resource page. If a project becomes active again, the requested and assigned demand values will display from the current time period forward.

Defining Resource Capacity

Each resource has a capacity, which the amount of time in the defined unit of measure, for example full time employee (FTE), that the resource is available per time period. Resource Capacity Planners enter the capacity for each resource, including any unavailable time.

Defining Capacity for Resources Using Resource Editor

Resource Capacity Planners who also have the Resource Demand Planner user role can enter and edit capacity values for resources in the Resource Editor using the **By Resource** view, which provides a means to view and assign capacity for more than one resource at a time.

To define capacity for a resource using Resource Editor:

1. From the **Resource** menu, select **Resource Editor**.
2. Display projects or demands.

   Use the  option to select to organize the display by resource. Resources display alphabetically. To display the total capacity for a pool, and sum of all pool capacities included in the view, select the **Group By Pool** option. Requests display shaded in yellow.
3. Enter the available capacity for each time period in the tan shaded cells in the Capacity row.

    If the same value applies to multiple periods across the row, click in the cell and click  or press **Shift +**. Enter the number of consecutive periods to copy the value to, and click **OK**. The value is copied to those periods, even if they are beyond the viewable area of the screen.

   If a requested-only resource pool contains a resource that is set to have its capacity auto-calculated, the capacities for that resource are read-only in Resource Editor.

4. Click **Apply** to save your changes.

Defining Capacity for Resources Within the Resource Planning Page

Resource Capacity Planners can also enter capacity values for resources from the Planning page available from the **Resource** menu. Using this option allows for capacity entry for one resource in a pool at a time. Capacities assigned through the Planning page are also accessible for review and modification within Resource Editor.

To define capacity for an individual resource:

1. From the **Resource** menu, select **Planning**.
2. In the **Pool** field, select the resource pool that contains the resource to modify.

   The resources assigned to the selected pool are displayed with their current availability defaulted to include both requested and assigned demands. Clearing either check box and clicking **Calculate** will reflect the updated availability for all listed resources.

   If a resource displays a negative availability value in **red**, that resource is over allocated for the period.

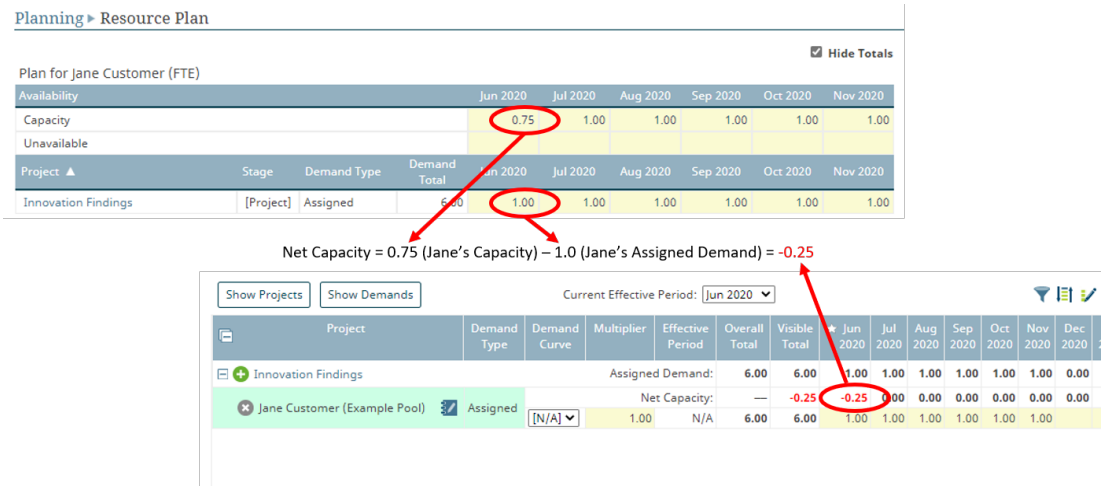
3. In the **Availability** section, click the name of the resource you want to modify.

   The selected user's Resource Plan page displays the user's capacity and current project demand. Clicking the **Hide Totals** check box will display or hide the details for the availability totals.
4. On the Resource Plan page, enter values in the appropriate Capacity fields to reflect the resource's availability during the relevant time periods.
5. Click **Apply** to save your changes.

Using the Unavailable Function Within the Resource Planning Page

The **Unavailable** row is designed to allow users to enter values in any scheduled times when the resource is unavailable or only partly available, such as for planned unavailability during vacations or maintenance. While this can be useful for managing specific resource capacity at a detailed project planning level, these values are not accounted for when calculating net capacity on the Resource Editor page, which can result in demands not being assigned appropriately and can negatively impact high-level planning. In order to ensure success in your company's project planning, Sopheon recommends leaving the Unavailable field blank, and making availability adjustments to the value in the appropriate Capacity field.

For example, Jane has been assigned as a full-time resource for a project. Since the unit of measure is defined as FTE (full-time employee), the assigned value is 1.0 per time period (month). Jane is on vacation for the first week of the time period, so her net capacity needs to reflect this change in availability. In order to reflect accurately at both the detailed and high-level planning levels, Jane's capacity for this time period should be changed to 0.75.



Note that when the capacity is changed, both the Resource Planning and Resource Editor pages reflect a negative availability value in **red**, indicating that the resource has been overallocated.

Notes:

- Capacity Planners can only edit **Capacity** and **Unavailable** values in pools they own.
- Demand and capacity values are shown per time period. The length of a time period (weeks, months, quarters, or years) is defined when Accolade is installed. When creating a resource plan for a generic resource, you can enter the resource's availability as the smallest amount possible, 0.01. This ensures that useful data is displayed in Portfolio Optimizer while not affecting the overall resource availability of the pool significantly.
- If Process Managers in your company are using Portfolio Optimizer, ensure that every resource has net capacity in every time period that contains project demand. This helps to ensure that useful data is displayed in Portfolio Optimizer.

Allocating Assigned Resources to Resource Demand Requests

Resource Demand Planners can allocate assigned resource demands with requested demands to show that they intended to satisfy or allocate request for a resource with a specific resource assigned to a project demand. This association provides visibility into what has been allocated to satisfy a requested demand.

Important! If you use Accolade Portfolio Optimizer to manage your resource demands and commit demand information back to Accolade, any allocations between requested and assigned demands are removed when you commit a scenario to Accolade.

Resource Demand Planners can do the following:

- Assign resources to a single project from within the project Resources page.
- Assign resources to one or more projects using Resource Editor.
- Assign resources using demand curves.

In addition, Resource Planners can edit the demands that are assigned to a document owner. These demands display as Assigned, and are either assigned to the owner, or to a system-generated resource based on the deliverable or activity function if an owner is not set. Click in the demand row to see which deliverable or activity is associated with the demand. Resource Demand Planners can update these demands as necessary.

Assigning Resources Within a Project

Resource Demand Planners can also assign resources for a project from within the project Resources page. Users with access to the project can also use the Resources page to review the resource requests, and those resources currently assigned to the project. Resources requested through the project pages are also available for review and modification within Resource Editor.

To assign a resource from within a project:

1. Display a project and select the **Resources** page.
2. Do one of the following:
   - **To view a resource for a project stage** - In the **Plan For** field, select the specific stage.
   - **To view a resource for the entire project** - In the **Plan For** field, select **Project**.

   Pools with existing requested or assigned resources display. Click to expand the display and view the requested or assigned resources.

   On the project's Resources page, click the or icon next to a pool name to view the demand history of the resources in that pool. indicates that the Project Manager made the most recent change to requests for the pool. indicates that a Resource Demand Planner made the last change in the pool.
3. Do one of the following to assign a resource to meet the Project Manager's resource request:

Request Type	Instructions
Assign the requested resource to the stage or project	In the **Demand Type** field for the resource demand request, select **Assigned**.
Add a resource to the stage or project to meet the demand request	Review the Project Manager's requests in the **Resource Plan** section of the screen. To assign a resource to the stage or project, add a resource from a resource pool that you own, or that does not have an owner. 1. In the **Pool** field, select the resource pool that contains the resource to assign.

Request Type	Instructions
	2. In the **Resource Availability** section, select the check box next to the resource you want to assign. The **Resource Availability** section displays the resources within the pool, and the availability for each time period. If a resource displays a negative availability number, that resource is over allocated for that time period. 3. Click **Add to Resource Plan**. 4. In the **Demand Type** field for the resource demand request, select **Assigned**.

4. For each resource in the **Resource Plan** section, enter the required demand for each time period for the project.
   - **To edit a single value** - Click a yellow shaded cell in a time period column and enter a value.
   - **To copy a value to multiple periods** - If the same value applies to multiple periods across the row, click in the cell and click  or press **Shift +**. Enter the number of consecutive periods to copy the value to, and click **OK**. The value is copied to those periods, even if they are beyond the viewable area of the screen.
   - **To copy and paste a pattern of values from a spreadsheet** - Highlight the cells to be copied in your spreadsheet and press **CTRL+C**. Click into the project Resources page in Accolade, then click and drag to highlight the destination cells and press **CTRL+V** to insert the copied values.

     Note: In the project's Resources page, multiple cells can be copied from a spreadsheet and pasted into Accolade. In order to paste in correctly, the number of cells copied from the spreadsheet must match the number of highlighted destination cells in Accolade.

   You can assign a partial resource, such as 0.50 full time employees (FTE).
5. Click **Apply** to save your changes.

Assigning Resources Using Resource Editor

Resource Demand Planners can assign resources from pools that they manage using the Resource Editor, which provides a means to assign resources for more than one project at a time. Resource Editor displays all demands with resources that belong to a pool that is related to at least one of the assigned pools that you own.

Note: Using Resource Editor is the recommended method for assigning demands to multiple projects at a time. However, Resource Demand Planners can also review and assign demand using the Planning page available from the **Resources** menu.

To assign resources to one or more projects using Resource Editor:

1. From the **Resource** menu, select **Resource Editor**.
2. Display projects or demands and apply filters as necessary.

   Requests display shaded in blue. Use the ⊞ or ⊟ options to expand or collapse a row or grouping. To expand or collapse all rows or groups displayed, use the ⊞ and ⊟ option in the table header.

   In Resource Editor, the ✓ or ◑ icon next to the resource indicates the fulfillment status for the resource. ✓ indicates that the demand request is fulfilled. ◑ indicates that the demand request is not or is only partially fulfilled.

3. Click ⊕ next to the requested demand to which you want to allocate an assigned demand.

   The list of available resources is automatically filtered to just those belonging to pools that are related to the pool that contains the resource in the requested demand. If you own no resources in related pools the list contains all resources that you own.

4. *(Optional)* In the Allocate dialog box, filter the list of available resources as necessary.
   - **To show all resources that you own** - Click **Clear Filters**.
   - **To show only resources in related resource pools** - Select the **Related Pools** check box.
   - **To filter the list by extended field settings** - Select an option in the extended field. If no extended fields are defined, no additional fields display for selection.
5. From the resources list, select the resource you want to assign and click **OK**.

   Assigned demands must have the same unit of measure defined in their resource pool as the requested demands they are fulfilling.

   The assignment displays grouped with the request and displays in bold with ● to indicate it is a new demand with no demand values assigned.

EXAMPLE Example

Project	Demand Type	Effective Period	Overall Total
Innovation Findings		Requested Demand:	6.00
		Assigned Demand:	0.00
General Resource (Example Pool) ◑	Requested	N/A	6.00
● **Engineering (Updated Resource Pool)**	Assigned	N/A	0.00

This assigned demand fulfills the requested demand.

6. *(Optional)* Click and select **Net Allocation** in the upper right of the Resource Editor page to display the **Net Allocation** row for the requested demand.

   Requested demands that have not been fulfilled by allocated assigned demands display in red.

   Example

   In the example below, the requested demand in July and August is under-allocated.

Project	Demand Type		★ Jun 2020	Jul 2020	Aug 2020
Innovation Findings		Requested Demand:	1.00	1.00	1.00
		Assigned Demand:	1.00	0.00	0.00
General Resource (Example Pool)	Requested		1.00	1.00	1.00
		Net Allocation:	0.00	-1.00	-1.00
Engineering (Updated Resource Pool)	Assigned		1.00		

7. For each assigned resource, enter the allocated demand for each time period for the project.

   - **To modify current and future values** - First select the current effective period, then enter a value in the **Multiplier** column that is larger or smaller than 1.00. The multiplier is applied to all values except those before the effective period.
   - **To edit a single value** - Click a yellow shaded cell in a time period column and enter a value.
   - **To copy a value to multiple periods** - If the same value applies to multiple periods across the row, click in the cell and click or press **Shift +**. Enter the number of consecutive periods to copy the value to, and click **OK**. The value is copied to those periods, even if they are beyond the viewable area of the screen.
   - **To copy a pattern of values to a different range of cells** - Click and drag to select a range of cells containing values, press **CTRL+C**, then click and drag to select a different range of cells and press **CTRL+V**.

   As you make edits in Resource Editor, next to a demand row indicates an edit to an existing row that has not been saved.

   To enter comments about the allocations you have made, click in the row and enter any information regarding your requests or modifications. Note that if Portfolio Optimizer is used to manage resources, comments are removed when resources are committed from Portfolio Optimizer back to Accolade.

8. Click **Apply** to save your changes.

Notes:

- To delete an assigned resource in the project Resource page, select the line in the **Resource Plan** section and click **Delete Entry**.
- To delete an assigned demand in Resource Editor, click next to the requested resource under a project. The row is shaded to indicate it is pending deletion and is removed when you click **Apply**. Deleting a demand row deletes all demand assigned within that row, even if it is not visible in the displayed time period. Click to undo the deletion prior to applying changes.
- To change an assigned demand in Resource Editor, delete the assigned demand and create a new association.
- When a project becomes inactive (through Close, Hold, or Kill actions), resources for the current and previous time periods will display as read-only on the project's Resources page, and future requested and assigned demands will not display on any resource page. If a project becomes active again, the requested and assigned demand values will display from the current time period forward.
- When a user is deleted from Accolade, the user is also removed from any resource plans unless the user has active demands on their time. If you delete or transfer all active demands, the user will disappear from the resource plan and can then be deleted from the resource pool.

Exercises - Assigning Resources to a Project

Try out what you have learned!

- Navigate to Resource Editor and display the projects or demands.
- Filter the list of available resources and select the resource to assign.
- Enter the allocated demand for each time period of the project.

Resource Editor Net Capacity Resource Calculations

Net resource capacity reflects all demands against a resource, even those you cannot see because they are for projects or pools you do not have access to. If a resource has more demand against it than the resource's total capacity, the net capacity values display as negative and in **red** text. If you do not need the net capacity information, you can hide it from the Resource Editor using in the upper right of the Resource Editor page.

Net capacity is calculated as follows:

- If the resource is an auto-calculated resource in a requested-only pool linked to assigned-only pools:

  Net Capacity = Total Available Capacity in all Related Pools - All Requested Demands for the Resource

For more information about linked pools, see "Linking Requested Resource Pools with Assigned Resource Pools" on page 20.

- If the resource is not part of a linked pool:

  Net Capacity = Total Available Capacity - All Demands for the Resource (Requested, Assigned, and Approved)

Example

You have a requested-only pool with an Any Chemist USA resource, which is a general resource that Project Managers can use to request a USA-based chemist for their projects. Your organization has 20 chemists in the USA that are in an assigned-only resource pools linked to the requested-only pool that contains the Any Chemist USA resource. The Any Chemist USA resource is set to have its capacity automatically calculated based on the capacities of the chemists in the related assigned-only pools.

Each USA-based chemist is the equivalent of a full-time employee (FTE), and all have full availability for the first month of the year. Therefore, the Any Chemist USA resource has a total available capacity of 20 FTEs in January. Multiple projects in your organization require chemists based in the USA. As a Project Manager, when you make requested demands for the Any Chemist USA resource, as you add your demands in Resource Editor, use the information in the **Net Capacity** row to determine if there is enough remaining capacity for the Any Chemist USA resource. If your requests, combined with any other requested demands or assigned demands for the Any Chemist USA Resource (which you cannot see in Resource Editor because you did not make the requests), exceeds the capacity, the net capacity displays as negative, red number.

In this same scenario, Resource Demand Planners use the information in the **Net Capacity** row to view the remaining capacity for resources in assigned pools as they create assigned demands to fulfill requested demands.

Important! Net capacity is viewable in both the Resource Editor and in the Resource Planning page, however the net capacity calculations on the Resource Editor page reflects different values than the net capacity on the Resource Planning page. The net capacity calculation on the Resource Planning page is the total net availability for the resource, and is calculated using the **Capacity** and **Unavailable** values by time period.

See "Using the Unavailable Function Within the Resource Planning Page" on page 30 for more information.

Notes:

- By default, an assigned-only pool can only be linked to one requested-only pool. If the **Allow Multiple Links For an Assigned Pool** system parameter is enabled, an assigned-only pool can be linked to more than one requested-only pool. Capacity calculations roll up to each parent, accordingly. With multiple parents, capacity may be over counted across the parent pools.

Transferring Demand to Other Resources

You may want to transfer a demand if, for example, you can satisfy a demand request using a different resource than the one requested. When a user is deleted from Accolade, you should delete or transfer any active demands for that user so the user can be removed from the resource pool.

Resource Demand Planners can only transfer Assigned resource demands and only to resources in the same pool. To transfer a requested resource, the Project Manager can delete the resource and request a different resource for the project.

> **Note:** Transferring demand to another resource is currently only available through the Resource Planning page. To transfer demand to another resource using Resource Editor, you must first delete the original demand and then add a new demand with the correct resource.

To transfer demand to another resource:

1. From the **Resource** menu, select **Planning**.
2. In the **Pools** list, select the resource pool that contains the resource whose demand you want to transfer.
3. In the **Resource** column, click the name of the Assigned resource whose demand you want to transfer.
4. Click **Edit Resource**.
5. In the row listing the demand you want to transfer, select the **Transfer to** option and select the resource that you want to transfer the demand to.
6. Click **Apply** to save your changes.

Notes:

- Demands in projects that are on hold or have been stopped are considered inactive and cannot be transferred.
- You cannot transfer an Approved demand. The Process Manager must change the demand type to Assigned. Then you can transfer it. (A user with both Resource Demand Planner and Process Manager roles can change Approved to Assigned and then transfer.)

Approving Resource Plans

A typical Accolade Resource Planning setup includes requested and assigned demands. However, your company can include an additional demand type of Approved. Gatekeepers typically make the decisions about whether resources for the following stage are approved at the gate meeting.

To manually approve a resource for a project:

1. Display a project and select the **Resources** page.
2. In the **Plan For** field, select the next stage to display the resources assigned for that stage.
3. In the **Demand Type** field, select **Approved** for each resource demand that is approved for the stage.
4. Click **Apply** to save your changes.

Notes:

- Approved demands display in Resource Editor for demands that have been approved for a project. However, Resource Demand Planners and Project Managers cannot approve resources using Resource Editor.
- After a resource is set to **Approved** for a project, the demand values for that resource in the project can no longer be changed. To allow a Resource Demand Planner to change the values for an approved resource, change the demand type back to **Assigned**.

Viewing Resource Plans

A resource plan is created for a project, a resource, or both, and is generated as a resource is requested or assigned to a project. Resource Demand Planners review plans to determine the most efficient use of resources within their pools across projects, and to verify if resources are under or over assigned across projects. Project Managers review the resource plans for the projects they manage to ensure they have the resources to complete project work on schedule. Other Accolade users have access to view resource plans for gate meeting discussions about approving resources for the next stage of project.

View a Resource's Plan

Resource Demand Planners can view a single resource's plan in Resource Editor. All other users listed to the right can view a single resource's plan through Resource Planning.

To view a resource's plan in Resource Editor:

1. From the **Resource** menu, select **Resource Editor**.

   If you are a Project Manager, select **Resource Requests** from the **Workspace** menu.
2. Display projects or demands and apply filters as necessary.

In Resource Editor, the or icon next to the resource indicates the fulfillment status for the resource. indicates that the demand request is fulfilled. indicates that the demand request is not or is only partially fulfilled.

3. Click in the upper right corner and select **By Resource** to sort the demands by resource.
4. Click to expand each resource and see their allocated demand by project.
5. *(Optional)* Click in the upper right corner and select the **Totals** and/or **Demand Type** check boxes to display the columns.

   If you are not the Resource Demand Planner for this pool, any demands for a resource in projects that you do not have access to are totaled and displayed in a row labeled **[Other]** in the **Project** column.

To review a resource's plan in Resource Planning:

1. From the **Resource** menu, select **Planning**.
2. In the **Pool** list field, select the resource pool that contains the resource you want to view.
3. Click the name of the resource to view the resource plan for that resource.

View a Project's Resource Plan

Resource Demand Planners and Project Managers can view the resource plan for a project in Resource Editor. All other users with access to the project can view the project's resource plan from the project's pages.

To view a project's resource plan in Resource Editor:

1. From the **Resource** menu, select **Resource Editor**.
2. Display projects or demands and apply filters as necessary.

   In Resource Editor, the or icon next to the resource indicates the fulfillment status for the resource. indicates that the demand request is fulfilled. indicates that the demand request is not or is only partially fulfilled.

3. Click in the upper right corner and select **By Project** to sort the demands by project.
4. Click to expand each resource and see their allocated demand by project.
5. *(Optional)* Click in the upper right corner and select the **Totals** and/or **Demand Type** check boxes to display the columns.
6. *(Optional)* Click in the upper right corner and select the **Net Allocation** and/or **Net Capacity** check boxes to display the rows.

   If you are not the Resource Demand Planner for this pool, any demands on this resource in projects that you do not have access to are reflected in the **Net Capacity** and **Net Allocation** rows.

To view a project's resource plan in the project Resources page:

1. Display a project and select the **Resources** page.
2. In the **Plan For** field, select the stage to display the resources assigned to a specific stage, or select **Project** to view resources for the entire project.
3. Click to expand a resource pool and view the resources from that pool that are planned for the project.

   On the project's Resources page, click the or icon next to a pool name to view the demand history of the resources in that pool. indicates that the Project Manager made the most recent change to requests for the pool. indicates that a Resource Demand Planner made the last change in the pool.

Notes:

- When a project becomes inactive (through Close, Hold, or Kill actions), resources for the current and previous time periods will display as read-only on the project's Resources page, and future requested and assigned demands will not display on any resource page. If a project becomes active again, the requested and assigned demand values will display from the current time period forward.

Resource Demand Curves Overview

A demand curve is a template of the estimated demand on the resources in a selected resource pool during the stages of a project. The curve is used to apply resources from the pool to projects based on the model and the values in the curve are used to calculate the resources required for time periods, such as months or quarters, in which project stages occur. Each demand curve is valid for the combination of a resource pool and process model, but more than one curve can exist for a resource pool-model pair.

Note: Demand curves create resource demands per project stage.

Resource Pool Administrators create demand curves for the pools that they own or for any unowned pools. If security lists are in use, a Resource Pool Administrator must also have access to the pool through the security list configuration. Although each curve is available for to apply to any resource in a pool, demand curves can exist that are meant to be applied only to certain individual resources. For example, you could create separate curves for junior and senior engineers in the Engineers pool. How you choose to use demand curves is dependent on how resources and resource pools are defined at your company.

Applying Resource Demand Curves

A demand curve is a template of the estimated demand for the resources in a selected pool during the stages of a project. When working with demands using Resource Editor, manually enter the demand, or

select a demand curve to apply to resources assigned to a project.

Demand values are typically calculated from gate to gate. After a demand curve is applied, the demand values are entered and are calculated as a weighted average of the values for each resource planning time period that a stage occurs in.

- For the first stage in a model starting with a stage, the demand value is calculated from the project start date to the first gate.
- For the last stage in a model ending in a stage, the value is calculated from the last gate to the project end date, or from the last gate for a number of time periods defined in the demand curve.
- If the project contains no gate dates, but the project does have start and end dates, the demand for the first stage of the demand curve is applied to every time period from the start date to the end date, unless the final stage has been defined as more than one time period.
- If all gate dates fall on the first day of the time period, the demand value in every time period equals the value in the demand curve for that stage.
- If one gate occurs sometime during the time period, the demand value is a weighted average of the demand for the stage before the gate and the demand after it.
- If two gates fall within a time period, the demand value is a weighted average of the values for the stage before the first gate, the stage between the gates, and the stage after the second gate.
- If one or more gates without a date falls between gates with dates, the curve's demand value for the first undefined stage is used to calculate the weighted average for all undefined stages.
- If no gate falls within a time period, the value for the period equals the value in the curve for that stage.

To apply demand using demand curves the following must be true:

- You must either be the resource pool owner of the pools containing the resources that you want to assign, or the pool must have no assigned owner and you must have security access to the pool.
- The projects, resource pools, and resources you need must already exist.
- The resource must be added to a project.
- The projects that you want to add demand to should have all their gate dates specified. Setting all gate dates before applying demand curves is strongly recommended to generate accurate demand values. When some or all gate dates are missing, the Resource Editor may display values different from those that the project actually requires when its gate dates are set.

To apply demand using demand curves in Resource Editor:

1. From the **Resource** menu, select **Resource Editor**.
2. Display resources, projects, or demands.
3. In the **Current Effective Period** field, select the first time period that the demand values in a demand curve are applied.

Applying a demand curve creates demand values for time periods beginning with the effective time period; however, values in time periods before the effective time period are preserved.

If the demand curve is changed part way through the project, you could set the current effective period to the current time period before reapplying the curve. This prevents the record of previous demand in the project from being overwritten while changing the demand for stages during and after the current time period. For example, if you set the period to September 2013, the demand values in the curve are applied to the month of September and after, but any values in August 2013 and before are not modified. See Reapplying Demand Curves below.

Important! The effective period begins on the first day of the period, and the setting governs each instance of applying a demand curve or changing a multiplier that occurs while the period is set.

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4. For a resource assigned to a project, select a demand curve in the **Demand Curve** column to apply to the resource.

   If a demand curve is already applied, selecting a different curve replaces existing demand values with values from the newly selected curve. If **N/A** displays, no demand curve is currently applied to the demand row. Selecting **N/A** in a row where values have already been applied does not delete them.

   Only demand curves set for the pool-model combination that match the pool the resource is in and model the project follows are available for selection.

5. *(Optional)* In the **Multiplier** field, enter a factor to use to multiply all the demand values calculated using the demand curve in this row.
6. Click **Apply** to save your changes.

Reapplying a Demand Curve

If a demand curve is modified, you must reapply it to any resources that use the curve within Resource Editor for the changes to take effect. If some demand values have been modified manually, you may need to reapply the original values from the demand curve.

Important! When you reapply a demand curve to a resource that already contains values, ensure that the current effective period correctly identifies the time period *before* which you want existing data to remain unchanged. If you overwrite historical data, you must re-enter the correct values manually.

When you reapply a demand curve, any manually entered values in time periods after the curve are deleted. If you need to preserve such values, copy them, reapply the curve, and then paste the values back to the appropriate columns.

To reapply a demand curve:

1. From the **Resource** menu, select **Resource Editor**.
2. Display resources, projects, or demands.

3. In the **Demand Curve** field, select **[N/A]** and then select the same demand curve.
4. Click **Apply** to save your changes.

Notes:

- For demand to be calculated for post-launch activities in a project ending in a stage, the last gate date must be set.
- If you apply a demand curve to a project without enough date information to calculate demand, all values for the resource for that project in Resource Editor are deleted.
- If gate dates are added or modified after the demand curve is applied, the changes to the demand are made automatically starting at the effective period that was selected when the curve was applied.

Creating Resource Demand Curves

Create demand curves to serve as templates of the estimated demand for resources in a resource pool during the stages of the model a project follows. Resource Pool Administrators can create demand curves that apply to active, gated models for pools in which they are assigned as the pool owner, or for pools that do not have an assigned owner. Resource Demand Planners can edit demand curve values and last stage durations for demand curves for resource pools that they own.

Example

For example, create a demand curve for the Engineering pool for a model that requires heavy engineering time at the beginning and middle of the project. The project may require two engineers in the first few stages, because more engineering resources are required in the planning, prototype, and development stages of the project. However, the project may require only half a full time engineer's time in the marketing and launch stages of the project.

Create a demand curve whose values are all zeros to confirm that a resource has been considered but that it is not needed, as opposed to a situation where a resource is overlooked.

To create a demand curve:

1. From the **Resource** menu, select **Demand Curves**.
2. Do one of the following:
   - **To add a new demand curve** - From the **Pool** and **Model** fields, select the resource pool and process model to which the demand curve applies, and then click **Add New** at the bottom of the **Demand Curves** list.
   - **To edit an existing demand curve** - Select the demand curve to edit from the **Demand Curves** list. Use the **Pool** and **Model** fields to filter the list, as necessary.

   The numbers after each item in the **Pool** and **Model** fields display how many demand curves exist for each.

3. In the **Name** field, enter a name, up to 64 characters long, which identifies the demand curve.

   Demand curve names are not required to be unique; however, for a mass import or modification using reference tables, they must be unique for a given pool-model combination. To help avoid confusion, create unique names across all pool-model combinations.

4. In the **Values** field, enter the demand, with a precision up to two decimal places, per time period in the resource pool's unit of measure. For example, 1 full time employee (FTE).
5. Select the **Active** check box when the curve is ready to use for resource planning.
6. Click **Create** to create a new demand curve or **Apply** to save your changes to an existing demand curve.

Notes:

- If the model begins with a stage, the duration of the first stage is from the project start date to the first gate date. If the model ends in a stage, you can specify for the final stage both a demand value and the stage's duration in time periods. The duration allows for demand for post-launch activities that occur after the project's last gate. If the model ends in a stage, and you do not enter a number of time periods for the stage to last, the duration of the last stage is from the last gate date to the project end date.
- To modify a demand curve's resource pool or model, you must delete the curve and recreate it.
- To delete a demand curve, display the demand curve and ensure the **Active** check box is cleared, then click **Delete**. If you need to clear the **Active** check box, click **Apply** to save the change, then click **Delete**.
- Modifying or deleting a demand curve does not automatically update demand in projects. Reapply the demand curve or manually delete the values, as necessary.

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