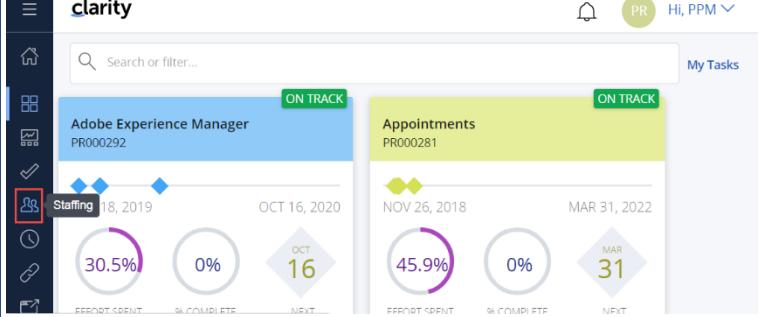
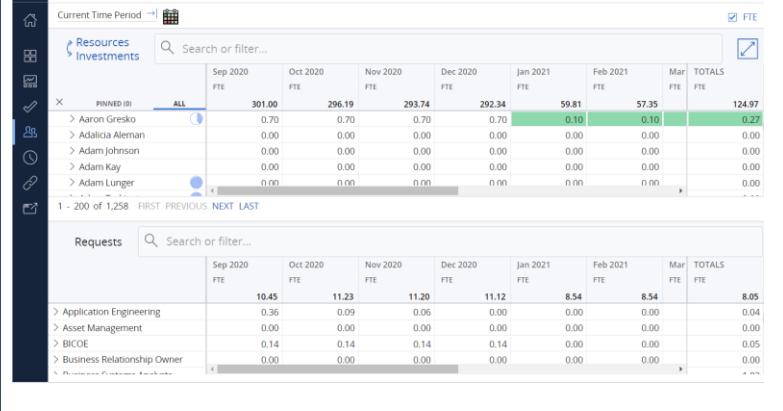
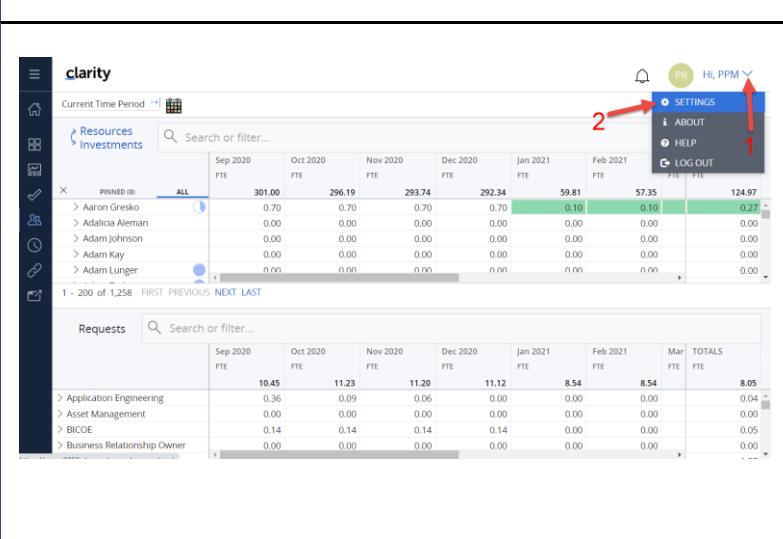


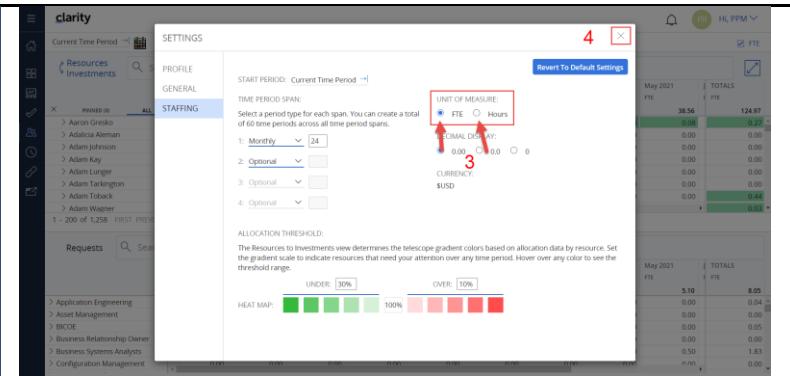
CA PPM Review Resource Allocations

Overview

- Project Managers and Resource Managers will coordinate to identify the team member(s) that will work on that project and agree upon an allocation for those identified resource(s)
- Project Managers will then add these identified resource(s) to their project team in CA PPM and enter in the agreed upon allocation percent
- The below instructions will guide you to review your teams allocations as a Resource Manager

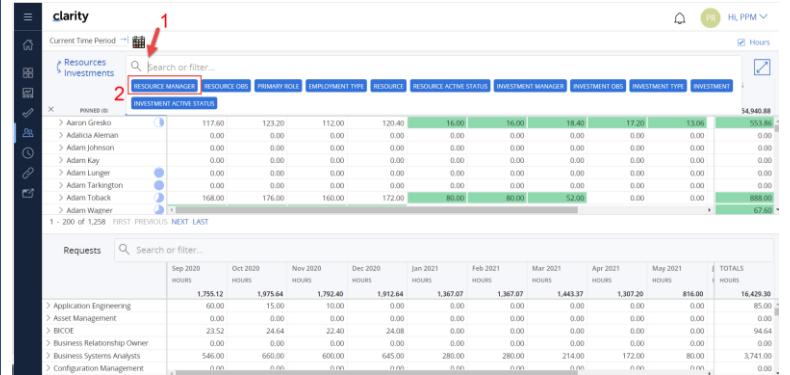
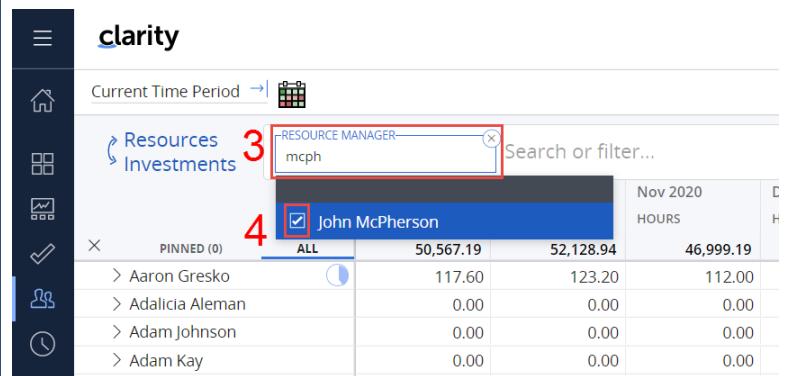
Instructions	Screen
<p><u>Accessing Team Members' Allocations</u></p> <p>1. Select the Staffing icon  to access the list of resources' allocations</p>	
<p>• You will land on this screen </p>	
<p><u>FTE or Hours View Settings</u></p> <p>1. If you would like to see allocations with the Full Time Equivalent or the Hours view, select the drop down arrow  next to your user name in the upper right hand corner</p> <p>2. Select Settings </p> <p>3. In the Unit of Measure section select the radio dial button for which measure you would like displayed in the Staffing view</p>	

4. Press the  icon to close the window and return to the Staffing view



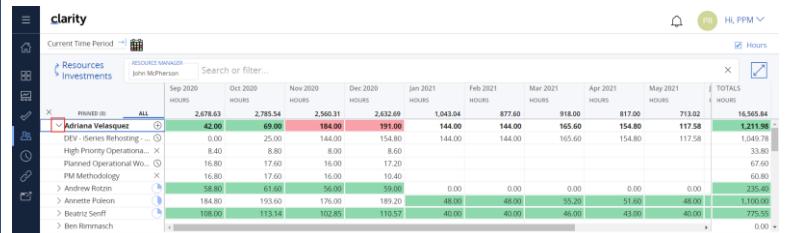
Filter for Your Resources

1. Click into the *Search or filter...* field to show the different options to filter by
2. Select the Resource Manager 
3. Start to type your last name until you see your full name appear
4. Select the check box next your name

Review Your Team's Project Allocations

1. Select the drop down arrow in the front of each person's name  to view each resource's projects that they are assigned to and their allocations
2. If you see any concerns or have any questions with allocations or missing projects for your team, please reach out to the project manager to remediate



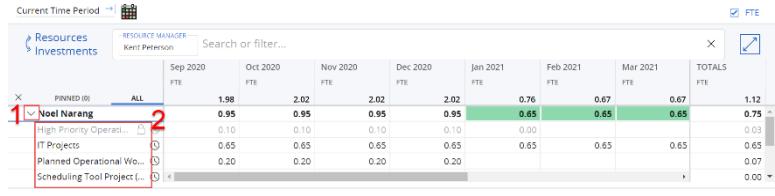
Manage Your Team's Operational Allocations

As you are reviewing each resource's project allocations, you can set their operational allocations directly in the Staffing page

1. Select the drop arrow next to the resource's name that you want to review projects for
2. A list of projects will display underneath that resource's name

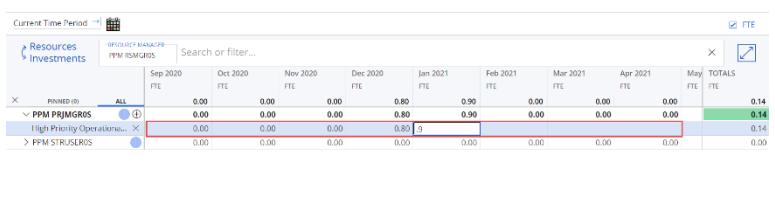
3. Click on the field for the month you need to set the allocation for and in-line edit

NOTE: Only edit operational projects for your team. For any project allocation updates, please reach out to the project manager.



The screenshot shows the Resource Manager Staffing page for Kent Peterson. The current time period is set to FTE. The table displays operational allocations for Noel Narang across several months. The first row shows the total allocation for Noel Narang, which is 1.12 FTE. The second row shows the breakdown by project: High Priority Operational Projects (0.95 FTE), IT Projects (0.65 FTE), Planned Operational Work (0.20 FTE), and Scheduling Tool Projects (0.00 FTE). The third row shows the total allocation for the team, which is 0.75 FTE. The fourth row shows the breakdown by project: PPM PRJGRPS (0.00 FTE), PPM STRJGRPS (0.00 FTE), and High Priority Operational Projects (0.14 FTE). The fifth row shows the total allocation for the team, which is 0.14 FTE.

PINNED (0)		ALL	Sep 2020 FTE	Oct 2020 FTE	Nov 2020 FTE	Dec 2020 FTE	Jan 2021 FTE	Feb 2021 FTE	Mar 2021 FTE	TOTALS FTE
1	Noel Narang	2	0.95	0.95	0.95	0.95	0.65	0.65	0.65	0.75
	High Priority Operational Projects		0.10	0.10	0.10	0.10	0.00			0.03
	IT Projects		0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.65
	Planned Operational Work		0.20	0.20	0.20	0.20				0.07
	Scheduling Tool Projects									0.00
PINNED (0)		ALL	Sep 2020 FTE	Oct 2020 FTE	Nov 2020 FTE	Dec 2020 FTE	Jan 2021 FTE	Feb 2021 FTE	Mar 2021 FTE	TOTALS FTE
2	Power User	3	0.00	0.00	0.00	0.85	0.00	0.00	0.00	0.14
	PPM PRJGRPS		0.00	0.00	0.00	0.80	0.99	0.00	0.00	0.14
	High Priority Operational Projects		0.00	0.00	0.00	0.80	0.00	0.00	0.00	0.14
	PPM STRJGRPS		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00



The screenshot shows the Resource Manager Staffing page for a different user. The current time period is set to FTE. The table displays operational allocations for a user. The first row shows the total allocation for the user, which is 0.14 FTE. The second row shows the breakdown by project: PPM PRJGRPS (0.00 FTE), PPM STRJGRPS (0.00 FTE), and High Priority Operational Projects (0.14 FTE). The third row shows the total allocation for the user, which is 0.14 FTE.

PINNED (0)		ALL	Sep 2020 FTE	Oct 2020 FTE	Nov 2020 FTE	Dec 2020 FTE	Jan 2021 FTE	Feb 2021 FTE	Mar 2021 FTE	Apr 2021 FTE	May 2021 FTE	TOTALS FTE
1	Power User	2	0.00	0.00	0.00	0.85	0.00	0.00	0.00	0.00	0.00	0.14
	PPM PRJGRPS		0.00	0.00	0.00	0.80	0.99	0.00	0.00	0.00	0.00	0.14
	High Priority Operational Projects		0.00	0.00	0.00	0.80	0.00	0.00	0.00	0.00	0.00	0.14