

CA Clarity™ Project & Portfolio Manager

Portfolio Management User Guide

v12.1.0



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Chapter 1: Portfolio Management

This section contains the following topics:

[Portfolio Management Overview](#) (see page 9)

[Page Navigation](#) (see page 9)

[Recommended Stages](#) (see page 10)

[By Example: Portfolio Analysis](#) (see page 11)

Portfolio Management Overview

The process of deciding which investments to start, continue, discontinue, or postpone is known as *portfolio management*. The Portfolio Management module provides the tools your portfolio managers need to scope, plan, limit, and distribute funds by thoroughly and carefully allocating money and time to high-priority initiatives.

Portfolio managers can create a detailed inventory of their projects, programs, services, applications, assets, products, and other work and then add these investments along with ideas to their portfolios.

Within a portfolio, you can view and analyze each project and investment, apply different scenarios, create reports, and apply processes. The portfolio's details include the investment name, length, remaining life, ROI, estimated cost, business objective, number of users, and benefits.

Page Navigation

You can access the portfolio management pages through a set of tabs available when a portfolio is open and in view. There are six tabs in the set and they can be configured.

The tabs—Properties, Contents, and Scenarios—cannot be removed, renamed or re-ordered. You can remove and customize the last three tabs or add more tabs from the *Manage Tabs* page. You can also set the default page (the page that appears when you click the name of a portfolio on the Portfolios page) using this page.

To access the *Manage Tabs* page, click the Manage Portfolio Tabs link from any portfolio page.

Note: See the *Common Features and Personal Options User Guide* for more information.

Recommended Stages

The ability to balance an entire portfolio provides you with the tools to end inefficient projects and eliminate redundant efforts while prioritizing projects. Portfolio managers need to select only those investments that align most closely with corporate goals.

Since organizations can invest in only so much work at any given time, careful analysis must be conducted to ensure that resources are optimally channeled to the best investment combinations of projects, programs, services, applications, assets, products, and other work.

You can manage your portfolio using the following recommended stages:

Stage 1: Inventory

Create a detailed inventory in CA Clarity PPM of your projects, programs, applications, assets, products, services, ideas, and other work according to name, length, remaining life, ROI, estimated costs, business objective, number of users, and benefits.

Stage 2: Evaluate

Study all present and possible investments and provide business cases and estimated costs to your company's steering committee. The committee then determines which investments are aligned with the overall company objectives by evaluating their risk with respect to technology, change management, and resources. Those investments that meet the committee's investment criteria are implemented.

Stage 3: Categorize and Score

Find the best combination of investments by categorizing and scoring them according to their alignment with your company's objectives. First, establish the right metrics and models. Then, take steps to minimize errors and biases in inputs provided to those models. By doing this your company has a greater chance of estimating the value that would be added by doing any proposed project portfolio.

Note: See the *Project Management User Guide* for more information.

Stage 4: Implement

Implement all of the decisions made to add, continue, or cease investments. Actively manage the portfolio by monitoring and evaluating the projects, programs, applications, products, assets, and other work against your company's objectives. By doing so, your company can make timely decisions regarding ongoing investments and potential new investments.

By Example: Portfolio Analysis

This example shows a corporation performing analysis using scenario-based planning.

INR Financial is a mid-size corporation. INR Financial's Retail Banking division provides traditional retail banking to consumers. The Technical Operation department of Retail Banking IT has a budget of \$12M for the upcoming funding period. Of this amount, the Network Security group receives \$5M. John Munoz, the Network Security manager, receives his budget. He needs to evaluate the list of projects in his portfolio.

Performing the Initial Analysis

John opens his project portfolio, Technical Operation Portfolio, and views his scorecard. He needs to make some comparisons to help him decide where he is going to invest his resources. He then decides to look at all of his projects—both approved and unapproved—and again compares the cost of these projects with his overall portfolio budgeted cost.

Looking at both approved and unapproved projects, John sees that he is over budget.

Portfolio Scorecard

(Portfolio: Network Security)

[Personalize][Manage Portfolio Tabs]

Properties

Contents

Scenarios

Scorecard

Analyze

Portfolio

Network Security

Scenario

--None--

Status

All

[Back to Portfolios]

Investments

[--Actions--]

Filter

[--Select--]

[Expand Filter]

Investment	ID	Priority	Goal	Alignment	Risk	Stage	Start	Cost
Member Online Services	B	3	Infrastructure Improvement				4/15/05	879,345.70 USD
Network Security System	C	10	Infrastructure Improvement				9/1/05	353,333.33 USD
Object Integration	4	10	Cost Reduction				9/1/05	333,200.00 USD
Online Bill Presentment	9	12	Maintain the Business				4/11/05	951,923.08 USD
PS_039_RH3Implementation	8	7	Grow the Business				6/1/05	776,933.70 USD
PS_075_WYQDevelopment	7	10	Grow the Business				6/1/05	600,828.73 USD
Reengineer Customer Service	A	2	Maintain the Business				4/18/05	1,482,213.44 USD
Swift Service Development	2	10	Grow the Business				9/1/05	160,000.00 USD
Aggregation								5,537,779.25 USD
Comparison								5,000,000.00 USD
Variance								537,777.25 USD

Highlighted rows = Approved Flag

Scenario-based Planning

After reviewing the budget for the upcoming funding period, the Steering Committee has decided that each group in the Technical Operation department must cut their budget by 10 percent. They notify John and each of the other managers.

John realizes that, based on the lowered budget amount of \$4.5M, he is now \$1M over budget. He will need to make some adjustments to his portfolio investments to come within his budget. He creates a new portfolio scenario that will test the impact of having a reduced budget. John's scenario will pin started projects and rank the projects based on their risk and alignment with corporate goals.

Pinning Investments

It is INR Financial's policy that any project already started should not be stopped. In order to comply with this policy, John adds a constraint to the "10% Reduction in Budget" scenario by pinning all started projects.

Scenario: Constraints (Portfolio: Network Security) Scenario: 10% Reduction in Budget	
Properties <input type="checkbox"/>	Save Generate Cancel
Constraints <input checked="" type="checkbox"/>	Quick Investment Settings Pin Required Investments <input type="checkbox"/> Respect Investment Dependencies <input type="checkbox"/> Pin Approved Investments <input type="checkbox"/> Use Portfolio's Date Range <input type="checkbox"/> Pin Started Investments <input checked="" type="checkbox"/>
Optimizations <input type="checkbox"/>	
Efficient Frontier <input type="checkbox"/>	
Investments <input type="checkbox"/>	
Access	Specific Investment Rules No investment rules have been added. Add from List Include Exclude Remove Save Generate Cancel
▶ Full View <input type="checkbox"/> ▶ Resource <input type="checkbox"/> ▶ Group <input type="checkbox"/>	
➡ = Current <input type="checkbox"/> = Available <input type="checkbox"/> = Not Yet Available	




























Optimizing the Scenario

John also wants to optimize his scenario based on specific optimization parameters. He'd like to use risk and alignment as factors on which to base his funding decisions. He weights risk higher than alignment.

Scenario: Optimizations (Portfolio: Network Security) Scenario: 10% Reduction in Budget															
Properties <input type="checkbox"/>	Save Generate Cancel														
Constraints <input type="checkbox"/>															
Optimizations <input checked="" type="checkbox"/>	<table border="1"> <thead> <tr> <th><input checked="" type="checkbox"/></th> <th>Attribute</th> <th>Ranking Method</th> <th>Attribute Weighting</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Risk</td> <td>Lower is better</td> <td>2.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Alignment</td> <td>Higher is better</td> <td>1.00</td> </tr> </tbody> </table>			<input checked="" type="checkbox"/>	Attribute	Ranking Method	Attribute Weighting	<input type="checkbox"/>	Risk	Lower is better	2.00	<input type="checkbox"/>	Alignment	Higher is better	1.00
<input checked="" type="checkbox"/>	Attribute	Ranking Method	Attribute Weighting												
<input type="checkbox"/>	Risk	Lower is better	2.00												
<input type="checkbox"/>	Alignment	Higher is better	1.00												
Efficient Frontier <input type="checkbox"/>	Total Results: 2														
Investments <input type="checkbox"/>	Add Remove														
Access	Save Generate Cancel														
▶ Full View <input type="checkbox"/> ▶ Resource <input type="checkbox"/> ▶ Group <input type="checkbox"/>															
➡ = Current <input type="checkbox"/> = Available <input type="checkbox"/> = Not Yet Available															

Applying the Scenario

In the portfolio scorecard, John applies the "10% Reduction in Budget" scenario and looks at his approved projects. He sees that the scorecard has taken into account those projects that have been approved per the scenario. He notices he is \$50,000 under budget.

Portfolio Scorecard										(Portfolio: Network Security)		[Personalize][Manage Portfolio Tabs]		
Properties Contents Scenarios Scorecard Analyze														
Portfolio		Network Security			Scenario		10% Reduction in Budget		Status		Approved		[Back to Portfolios]	
Investments												[--Actions--]		  
Filter		[--Select--]												[Expand Filter]
Investment		ID	Priority	Goal	Alignment	Risk	Stage	Start	Cost					
Member Online Services		B		3	Infrastructure Improvement			<div><div></div></div>	4/15/05	557,666.02 USD				
Network Security System		C		10	Infrastructure Improvement			<div><div></div></div>	9/1/05	453,333.33 USD				
Object Integration		4		10	Cost Reduction			<div><div></div></div>	1/1/05	364,167.95 USD				
Online Bill Presentment		9		12	Maintain the Business			<div><div></div></div>	4/11/05	438,051.92 USD				
PS_039_RH3Implementation		8		7	Grow the Business			<div><div></div></div>	6/1/05	818,370.17 USD				
PS_075_WYQDevelopment		7		10	Grow the Business			<div><div></div></div>	6/1/05	600,828.73 USD				
Reengineer Customer Service		A		2	Maintain the Business			<div><div></div></div>	4/18/05	1,185,770.75 USD				
Swift Service Development		2		10	Grow the Business			<div><div></div></div>	1/1/05	31,792.74 USD				
Aggregation									4,449,981.61 USD					
Comparison									4,500,000.00 USD					
Variance									50,018.39 USD					

Refining the Scenario

John notices the Global Securities Enhancements project was not approved because it has a budgeted cost of \$63,000—slightly more than what he has remaining in his budget. John would like to accommodate this project in his portfolio; he needs to decide where to invest his resources.


John can do a number of things to fit the Global Securities Enhancements project into his remaining budget. He can reduce the scope of one of his approved projects thereby reducing its budgeted cost in order to accommodate the unapproved project. He can also shift the Global Securities Enhancements project's dates in order to reduce its budgeted cost during the funding period.

Again, he looks at all of his projects—both unapproved and approved. He decides to shift the Global Securities Enhancements project's dates out so that it fits into the portfolio's budget in the funding period.

Portfolio Scorecard (Portfolio: Network Security)										[Per]
<div> <div>Properties</div> <div>Contents</div> <div>Scenarios</div> <div>Scorecard</div> <div>Analyze</div> </div>										
<div> <div>Portfolio</div> <div>Network Security</div> <div>Scenario</div> <div>10% Reduction in Budget</div> <div>Compare To</div> <div>[--Plan of Record--]</div> </div>										
<div> <div>Status</div> <div>All</div> <div>Portfolio Roles</div> <div>All</div> <div>Booking Status</div> <div>All</div> <div>Filter</div> <div>More >></div> </div>										
Investments										Investments
Filter [--Select--]										
Investment▲	ID			Priority	Goal	Alignment	Risk	Stage	Start	Planned Co
Global Securities Enhancements	GSE-0075987			2	Maintain the Business			<div></div>	4/10/08 6/18/08	43,213 34,646
Member Online Service	inr03246			3	Infrastructure Improvement			<div></div>	4/15/08	557,666
Network Security System	inr20023			10	Infrastructure Improvement			<div></div>	9/1/08	453,333
Object Integration	obj00034534			10	Cost Reduction			<div></div>	9/1/08	214,167 364,167
Online Bill Presentment	inr24512			12	Maintain the Business			<div></div>	1/1/08	438,051
PS_039_RH3Implementation	8			7	Grow the Business			<div></div>	6/1/08	818,370
PS_075_WYQDevelopment	7			10	Grow the Business			<div></div>	6/1/08	600,828
Reengineer Customer Service	inr310034			2	Maintain the Business			<div></div>	10/1/08	1,010,101
Swift Service Development	inr381450			10	Grow the Business			<div></div>	10/20/08	105,473 207,473
Aggregation										4,484,639
Comparison										4,500,000
Variance										15,360

Communicate the Scenario

John's project portfolio is now within budget and has the Steering Committee's approval. He notifies the project managers about the changes they need to make based on the scenario.

Portfolio Scenarios (Portfolio: Network Security) [Manage Portfolio Tabs]						
Properties Contents Scenarios Scorecard Analyze						
Portfolio Network Security [Back to Portfolios]						
<input checked="" type="checkbox"/>	Current	Scenario		Budget Cost	Budget Revenue	Portfolio
<input type="checkbox"/>		10% Reduction in Budget		5,000,000.00 4,500,000.00 USD	7,500,000.00 5,032,024.92 USD	Network Security Portfolio
Owner Carraway Laura						
New	✓ Copy	✓ Delete	✓ Communicate Scenario			

Chapter 2: Investments

This section contains the following topics:

[Investment Overview](#) (see page 17)

[Investment Creation](#) (see page 23)

[Main Properties](#) (see page 27)

[Capacity Planning Scenarios](#) (see page 43)

[Hierarchies](#) (see page 44)

[Investment Team](#) (see page 52)

[Retire Investments](#) (see page 70)

[Mark Investments for Deletion](#) (see page 71)

Investment Overview

Investments—projects, programs, applications, assets, products, ideas, services, and other work—make up a portfolio’s inventory. Collectively, they are the investments under analysis. Only when you have identified, cataloged, and described your complete domain of investments, can you effectively manage investment portfolios.

You can quickly create and maintain your investment inventory with the minimum information required for portfolio management. Each investment you add becomes part of a collective set and is managed with that set separately from the other investment types.

You can also create and manage portfolios, including how to add other investments, including projects, services, and ideas to your portfolio. Using portfolio management, you can distribute up, roll down, rank, and time vary your investments as a collection under analysis.

The following are the components associated with investment management:

Properties

Use the Properties tab to define the investment, from its name and schedule to baselines that capture snapshots at various stages in the investment's lifecycle. In addition, you can define budget information and enable the investment for financial transactions.

Team

Use the Team tab to build a team for the investment. A team consists of staff who will perform the work and participants who can assist staff by communicating information, suggestions, and concerns, but do not perform any work directly related to the investment.

Financial Plans

A financial plan is a tool that helps managers estimate and predict future cost requirements. Financial planning tools allow managers to model in detail where cost or revenues for a specific period might occur and create the budget most suitable for business needs.

Finance managers set up defaults that define how financial plans can be created and the financial time periods used. The investment managers can create multiple financial cost plans as estimates for a budget and submit the most appropriate cost plan for approval as a budget. Finance managers approve submitted cost plans.

The investment's financial planning pages shows bottom up aggregation of the plan and the line item plan details from child investments.

Note: See the *Financial Management User Guide* for more information.

Chargebacks

Chargebacks are the inter-account transfer of costs to departments that receive investments. Chargebacks debit (or charge) these departments for their shared cost of investments during a specified period of time. A corresponding credit is issued to departments who provided the investment—giving these departments financial credit for the work they completed.

Managers set up the defaults that determine how chargebacks are processed and set up the debit rules that determines who gets charged and how much.

Note: See the *Financial Management User Guide* for more information.

Department managers who are charged for the cost of investments can review and approve these charges via an invoice. Department managers who provide the investment can monitor incurred costs and credits received via recovery statements.

Note: See the *Common Features and Personal Options User Guide* for more information.

Hierarchies

Use the Hierarchy tab to view and manage parent and child relationships with other investments. With a hierarchy, you can view the financial rollup and effort rollup.

You may also convert an idea into an investment using Demand Management.

Note: See the *Demand Management User Guide* for more information.

Processes

Use the Processes tab to view initiated processes or create new ones. For example, you can create a process that notifies the managers when the status of an investment changes to "Approved." You can also define a process that takes action, such as changing the progress to "Completed."

Your CA Clarity PPM administrator can define service type-specific processes—or global processes designed to work on a specific service—from the Administration Tool. Use the *Processes: Initiated* page to create and run processes on services.

Note: See the *Administration Guide* for more information.

Audit

Audit trail keeps a historical record of all changes, additions, and deletions that occurs to specified investment fields. Use this tab to view a log of change, addition, or deletion records for any of the fields chosen for auditing.

The Audit tab appears only if it has been set up your CA Clarity PPM administrator and if you have the appropriate access rights. The CA Clarity PPM administrator also determines which fields are audited and what information is stored in the audit trail.

Note: See the *Common Features and Personal Options User Guide* for more information.

About Investment Types

The following are the investment types that you can define and include in your investment portfolio:

Project

Used to capture data specific to the existing projects or future projects within your organization.

Note: See the *Project Management User Guide* for more information.

Program

Used to capture data specific to the existing programs or future programs within your organization. A program is considered as a project.

Note: See the *Project Management User Guide* for more information.

Application

Used to capture data specific to the applications running or being implemented within your organization.

Asset

Used to capture data specific to the assets which incur costs and benefits for your organization.

Product

Used to capture data specific to the products produced or owned by your organization.

Idea

Used to capture data specific to the ideas being considered for implementation by your organization.

Note: See the *Demand Management User Guide* for more information.

Service

Used to capture data specific to the services provided by your organization.

Note: See the *IT Service Management User Guide* for more information.

Other Work

Used to capture data specific to steady-state work performed by <CAPMM> resources. Other work can represent overhead tasks such as management and maintenance. Use this investment type to catalog the investments that are incurring costs and benefits and are not projects, assets, applications, ideas, services, or products but that need to be included in your investment portfolio.

OBS Associations

Organizational breakdown structures (OBS) controls access, department hierarchies, and reporting. If at least one OBS exists for investments, you can associate any of these OBS's to your investment.

The OBS's available from the Organizational Breakdown Structures section of the investment's Properties: *Main - General* page appear only when your administrator associates the named OBS with the investment object, such as the Application object.

The OBS named "Department" is used to associate an investment with a department. It is listed last if multiple "Department" OBS's exist.

Note: See the *Common Features and Personal Options User Guide* for more information.

Reports

The following are suggested reports for investments:

- Resource Assignments
- Capacity vs Demand By Resource (PMO Accelerator report)
- Capacity vs Demand By Role (PMO Accelerator report)
- Budget/Forecast Analysis
- Project Transactions Inquiry
- Timesheet Detail
- Portfolio Alignment

Note: See the *Common Features and Personal Options User Guide* for more information.

Investment Jobs

The *Investment Allocations* job may influence data or performance in Portfolio Management.

Note: Contact your administrator or see the *Administration Guide* for more information.

Access Investments

You can manage the following investment types from the Portfolio Management menu:

- Application
- Asset
- Idea
- Product
- Project
- Program
- Service
- Other

Investment types are described in the following documents:

- **Note:** See the *Project Management User Guide* for more information.
- **Note:** See the *IT Service Management User Guide* for more information.
- **Note:** See the *Demand Management User Guide* for more information.

To access investments

To access and manage these investments, select the investment type from the Portfolio Management menu. For example, to view a list of your applications, select Applications.

The list page appears. You can manage the investment, such as open an individual investment, create a new investment, link directly to the investment's details, and delete an investment.

How to Manage Investments

The investment list page displays a list of all the approved and unapproved investments of that type to which you have view, edit, or delete access rights.

From the list page, you can do the following:

- [Create investments](#) (see page 24).
- [Edit investment properties](#) (see page 27), such as general, schedule, and budget.
- [Manage investment hierarchies](#) (see page 44).
- [Manage investment teams](#) (see page 52).

You can filter, sort, and reconfigure this list page. Investments are sorted in ascending order by name. You can also save and use filters, build and use power filters, delete filters, and sort lists.

Note: See the *Common Features and Personal Options User Guide* for more information.

Investment Creation

Before you can analyze investments from within a portfolio, you must first define them in CA Clarity PPM. With sufficient access rights, portfolio managers can create investments—projects, programs, applications, assets, products, services, ideas, and other work—from the list page for that investment type. You create investments by importing them from another system of record into CA Clarity PPM or by creating them individually.

When you create an investment, you define the investment's general, financial, and organization breakdown structure (OBS) properties. You also establish the investment's prioritization and scoring metrics for portfolio management, such as the investment's planned cost and planned benefit, as well as its risk, NPV, ROI, and alignment with corporate strategies. These properties help portfolio managers identify which investments—together with the other portfolio investments—are able to be shelved or removed based on spending restrictions during the budgeting process.

Import from Another System

If the system of record for investments is not CA Clarity PPM, you can import investments from the system of record using XML Open Gateway (XOG). Once imported, they can be viewed and managed in CA Clarity PPM and can be participate in the portfolio management process.

Note: See the *XML Open Gateway Developer Guide* for more information.

Create Investments

Use the *Create* page to define your investment's general, financial, and OBS properties. The fields that display on this page are the same fields that will display on the *Properties: Main - General* page once you save the new investment.

The *Create* page is configurable and may contain custom fields. You automatically acquire the implicit right to edit the investments you create. The investments you create are automatically added as unapproved investments to the default portfolio.

To create a new investment

1. Select the type of investment you want to create from the Portfolio Management menu.

The list page for that investment type appears.

2. Click New.

The *Create* page for that investment type appears.

3. In the General section, complete the following required fields:

<Investment> Name

Defines the name of the investment. Once created, this field becomes read-only.

Limit: 80 characters

<Investment> ID

Enter the investment's unique ID across all investments. If auto-numbering is configured, then this field is pre-populated and is read-only.

Limit: 20 characters

Status

Indicates the status of the investment.

Values: Approved, Rejected, Unapproved

Default: Unapproved

Progress

Indicates the progress of the investment. Select one of the following values from the drop-down:

- Completed
- Not Started
- Started

Default: Not Started

4. In the General section, complete the following fields as needed:

Description

Defines the investment's detailed description.

Limit: 762 characters

Manager

Defines the manager of the investment. By default, the manager is the user who creates the investment. Click the Browse icon to select another manager.

Start Date

Defines when the investment starts.

Note: If the start date and finish dates are not specified, allocation data displayed on the Team tab cannot be calculated.

Finish Date

Indicates when the investment finishes.

Goal

Defines the goal for the investment that aligns it with the main corporate strategy. Select a goal from the drop-down. The values are defined by your organization and set by your CA Clarity PPM administrator.

This metric is used in portfolio analysis when you use comparable goal criteria across all portfolio investments.

Alignment

Indicates how well the investment is aligned to the organization's business goal. The higher the value, the stronger the alignment. This metric is used in portfolio analysis when you use comparable business alignment criteria across all portfolio investments.

Enter a numeric value. When saved, one of the following stoplight symbols is displayed:

- Red stoplight. Score between 0 and 33 are not well aligned.
- Yellow stoplight. Score between 34 and 67.
- Green stoplight. Score between 68 and 100 are well aligned.

Status Indicator

Displays a graphical representation of the status. For example, if the status is "Approved," you may visually represent the status as a Green stoplight.

Values are Red, Yellow, and Green. The selection is displayed as a stoplight symbol when saved.

Stage

Defines the stage in the investment's lifecycle. Click the Browse icon to select a stage. The list of choices is company-specific and is dependent on the values that were set by your administrator.

This metric is used in portfolio analysis when you use comparable stage criteria across all portfolio investments.

Priority

Indicates the relative importance to the organization's business goal. This metric is used in portfolio analysis when you use comparable priority criteria across all portfolio investments.

Limit: zero (low) to 36 (high).

Default: 10

Risk

Indicates the numeric risk score for risk. The lower the value, the lower the risk. This metric is used in portfolio analysis when you use comparable risk criteria across all portfolio investments.

Enter a numeric value. When saved, one of the following stoplight symbols is displayed.

- Green stoplight. Score between 0 and 33 indicates low risk.
- Yellow stoplight. Score between 34 and 67.
- Red stoplight. Score between 68 and 100 indicates high risk.

Required

Indicates if the investment is included in scenario selection criteria. It is used for portfolio scenario constraints to pin required investments. Select the check box to include in scenario selection criteria.

5. In the Organizational Breakdown Structure section, click the Browse icon next to the OBS you want to associate with the investment for security, organizational, or reporting purposes.

The OBS named "Department" is used to associate the investment with a department. It is listed last if multiple OBS's exist.

Note: See the *Common Features and Personal Options User Guide* for more information.

6. Click Submit.

The new investment is created and appears in the list on the investment's list page.

Main Properties

Main properties lets you define base information about the investment. To view main properties, open the investment. The *Properties: Main - General* page appears by default. You can also access other main properties pages by clicking the links from the content menu.

You can do the following:

- Edit general information, such as name, manager, goals, status, alignment, and OBS associations.
- Manage scheduling information, such as start and finish dates, and tracking methods.
- Manage budget information, such as planned, budget, and forecasted cost and benefit, and set financial planning and metrics options.
- Enable for financial transactions.

Edit General Information

Use the *Properties: Main - General* page to view or edit general information, such as the name, ID, description, manager, goal, alignment, status, stage, priority, version, risk, and progress.

You can also view or associate an Organizational breakdown structure (OBS) with your service for security, organizational, or reporting purposes.

To edit an investment's general information

1. Open the investment.

The *Properties: Main - General* page appears.

2. In the General section, view or edit the following fields:

<Investment> Name

Defines the name of the investment. Once created, this field becomes read-only.

Limit: 80 characters

<Investment> ID

Defines the investment's uniquely identifier.

Description

Defines the investment's detailed description.

Limit: 762 characters

Active

Specifies whether the investment is active. Activate the investment to allow resources to view investments in portfolios and in any capacity planning portlet.

Default: Selected

Goal

Defines the goal for the investment that aligns it with the main corporate strategy. Select a goal from the drop-down. The values are defined by your organization and set by your CA Clarity PPM administrator.

This metric is used in portfolio analysis when you use comparable goal criteria across all portfolio investments.

Alignment

Indicates how well the investment is aligned to the organization's business goal. The higher the value, the stronger the alignment. This metric is used in portfolio analysis when you use comparable business alignment criteria across all portfolio investments.

Enter a numeric value. When saved, one of the following stoplight symbols is displayed:

- Red stoplight. Score between 0 and 33 are not well aligned.
- Yellow stoplight. Score between 34 and 67.
- Green stoplight. Score between 68 and 100 are well aligned.

Status

Indicates the status of the investment.

Values: Approved, Rejected, Unapproved

Default: Unapproved

Status Indicator

Displays a graphical representation of the status. For example, if the status is "Approved," you may visually represent the status as a Green stoplight.

Values are Red, Yellow, and Green. The selection is displayed as a stoplight symbol when saved.

Stage

Defines the stage in the investment's lifecycle. Click the Browse icon to select a stage. The list of choices is company-specific and is dependent on the values that were set by your administrator.

This metric is used in portfolio analysis when you use comparable stage criteria across all portfolio investments.

Priority

Indicates the relative importance to the organization's business goal. This metric is used in portfolio analysis when you use comparable priority criteria across all portfolio investments.

Limit: zero (low) to 36 (high).

Default: 10

Alignment

Indicates how well the investment is aligned to the organization's business goal. The higher the value, the stronger the alignment. This metric is used in portfolio analysis when you use comparable business alignment criteria across all portfolio investments.

Enter a numeric value. When saved, one of the following stoplight symbols is displayed:

- Red stoplight. Score between 0 and 33 are not well aligned.
- Yellow stoplight. Score between 34 and 67.
- Green stoplight. Score between 68 and 100 are well aligned.

Progress

Indicates the progress of the investment. Select one of the following values from the drop-down:

- Completed
- Not Started
- Started

Default: Not Started

Required

Indicates if the investment is included in scenario selection criteria. It is used for portfolio scenario constraints to pin required investments. Select the check box to include in scenario selection criteria.

3. In the OBS section, associate an OBS to the investment.
4. Save your changes.

Manage Scheduling Information

Use the investment's *Properties: Main - Schedule* page to set the start and finish dates, time entry, and define the charge code.

To specify the scheduling properties

1. Open the investment.
The *Properties: Main - General* page appears.
2. Click the Schedule link from the content menu.
The *Properties: Main - Schedule* page appears.
3. In the Schedule section of the page, complete the following fields:

Start Date

Defines when the investment starts.

Note: If the start date and finish dates are not specified, allocation data displayed on the Team tab cannot be calculated.

Finish Date

Indicates when the investment finishes.

Set Planned Cost Dates

Indicates if planned cost dates are synchronized with the investment's start and finish dates. Select the check box to synchronize.

4. In the Tracking section of the page, complete the following fields:

Time Entry

Indicates if staff members can enter time on their timesheets for this investment. Select the check box to enable the investment for time entry.

Important! Each staff member must also be enabled for time entry.

Note: See the *Common Features and Personal Options User Guide* for more information.

Track Mode

Indicates the tracking method used to enter time for this investment.

Values:

- Clarity. Staff members enter time against their assigned tasks using timesheets.
- None. Non-labor resources, such as expenses, materials, and equipment track actuals through transaction vouchers, or through a scheduler, such as Open Workbench or Microsoft Project.
- Other. Indicates that actuals are imported from a third-party program.
- **Default:** Clarity

Charge Code

Defines the charge code associated with the investment. Charge codes are to process financial transaction and in financial planning to track posted actuals.

Click the Browse icon to select a charge code. If you enter a different charge code at the task level on timesheets, the task level charge codes will override the charge code you enter here.

5. Click Save.

Budget Properties

You can define your investment's budget properties using the *Properties: Main - Budget* page. Budget data is essential in managing and analyzing portfolios. Correctly defining and recording planned cost and benefit information is key to accurately assessing and analyzing investments.

Note: In order for planned cost data to display for a portfolio, the *Update Hierarchy Data* job must be run. This job is required even if the included investments are not included and being managed in the hierarchy.

With a simple budget, you can define metrics such as the investment's planned cost, Net Present Value (NPV), Return on Investment (ROI), and breakeven information.

You can also use this page to define the investment's simple forecasted costs and benefits. You can set the start and end date over which the budget is experienced. Money flows constantly and evenly over this period. The values you enter are applied over only one time period—from the investment's start date to the finish date—and are applied only to your investment not to any of its child or parent investments.

Alternatively, a detailed financial plan lets you budget costs over multiple periods. If you choose to create a financial plan, data from the plan is automatically populated in the budget properties page.

Note: See the *Financial Management User Guide* for more information.

Define Simple Budgets

You can define your investment's simple budget using the *Properties: Main - Budget* page. If you later define a detailed plan, data from the detailed plan override the simple budget, and the fields on this page become display-only.

Note: See the *Financial Management User Guide* for more information.

To define a simple budget

1. Open the investment.
The *Properties: Main - General* page appears.
2. Select Budget from the content menu.
The *Properties: Main - Budget* page appears.
3. Complete the following fields:

Currency

Specifies the currency you want to use when calculating the budget and forecast values.

Planned Cost

Enter a planned cost for the entire investment. The value is distributed between the planned cost start and planned cost finish dates.

Planned Cost Start

Defines the scheduled start date for the investment's budget. Click Browse to select another date.

Planned Cost Finish

Defines the scheduled finish date for the investment's budget. Click Browse to select another date.

Planned Benefit

Defines the anticipated financial benefit for this investment. The value is distributed between the planned benefit start and finish dates.

Planned Benefit Start

Defines the scheduled start date for the investment's benefit. Click Browse to select another date.

Planned Benefit Finish

Defines the scheduled finish date for the investment's benefit. Click Browse to select another date.

Planned NPV

This field is calculated based on the following formula:

$\text{Planned NPV} = \text{Planned Benefit} - \text{Planned Cost}$

Note: To make this field available for data entry, clear the Calculate NPV Data field.

Default: Locked

Planned ROI

The value in this field is calculated based on the following formula:

$\text{Planned ROI} = \text{Planned NPV} / \text{Planned Cost}$

Note: To make this field available for data entry, clear the Calculate NPV Data field.

Default: Locked

Planned Breakeven

Displays the date and amount to indicate the period and value at which the program becomes profitable.

Note: To make this field available for data entry, clear the Calculate NPV Data field.

Default: Locked

Calculate NPV Data

Specifies whether you want to have the investment's net present value (NVP), which includes the Planned NPV, Planned ROI, and Planned Breakeven data, system calculated based on the formulas listed in the fields' descriptions.

Default: Selected

4. Click Save.

Enable Financial Transactions

Use the *Properties: Financial* page to financially enable the investment for financial processing. You can identify the financial location, financial department, and other attributes that are used when processing financial transactions.

You can also associate general, labor transaction rates, material transaction rates, equipment transaction rates, and expense transaction rates to the investment.

The following must be set up before you can enable an investment for financial transactions.

- Entity, WIP and investment classes, location, and rate and cost matrices.

Note: See the *Administration Guide* for more information.

- A department.

Note: See the *Common Features and Personal Options User Guide* for more information.

To financially enable an investment

1. With the investment open, click the Financial link from the content menu.
The *Properties: Financial* page appears.
2. In the General section, enter the following:

WIP Class

Defines the work-in-process class used to match the investment with rate and cost matrices. It can also be used for reporting purposes. Click the Browse icon to select a WIP class.

Investment Class

Defines the investment class used to match the investment with rate and cost matrices. It can also be used for reporting purposes. Click the Browse icon to select an investment class.

Department

Defines the department used during transaction processing of chargebacks to charge or credit departments for costs. The department can also be used to match the investment with rate and cost matrices. If a department is selected on the general properties page, this field is auto-populated. Required for chargebacks.

Location

Defines the location used to match the investment with debit and credit rules for transaction processing of chargebacks. It can also be used to match the investment with rate and cost matrices if system or entity-level defaults indicate that the source location is taken from the investment.

Note: See the *Administration Guide* for more information.

3. In the Labor Transaction Rates, Material Transaction Rates, Equipment Transaction Rates, or Expense Transaction Rate sections, enter the following for each transaction type as needed:

Rate Source

Defines the rate used during transaction processing to charge for the cost of labor, materials, equipment, or expenses associated with the service. Click the Browse icon to select a rate matrix.

Cost Source

Defines the cost of the labor, materials, equipment, or expenses associated with the service. Click the Browse icon to select a cost matrix.

Exchange Rate Type

If multi-currency is enabled, this indicates how rates and costs are converted.

4. Save your changes.

Incidents

From investment properties, you can manage incidents assigned to the investment and also associate incident categories to the investment.

The following are the incident subtabs:

Incident Category

Incident categories group incidents so that you can capture and assess the cost incurred and to view resource utilization. On this subtab, you can associate incident categories to your investment. Incident categories set up and maintained by your CA Clarity PPM administrator.

Incidents

Incidents track the work performed on your investments. On this subtab, you can view incidents assigned to your investments or create new incidents.

Associate the Investment with Incident Categories

Use the *Properties: Incident Categories* page to associate your investment with an incident category.

To associate the investment with an incident category, your CA Clarity PPM administrator must create them. Your CA Clarity PPM administrator can also associate investments collectively to an incident category.

Note: See the *Administration Guide* for more information.

To associate the investment with an incident category

1. Open the investment.
2. Click the Incident Categories subtab.
The *Properties: Incident Categories* page appears.
3. Click the Browse icon next to the Select Categories list box.
The *Select Categories* page appears.
4. Select the incident categories you want to associate with the investment, and click Add.
The *Properties: Incident Categories* page appears.
5. Click Save.

View and Manage Incidents

Use the *Properties: Incidents* page to view a list of incidents associated with the investment. You can view a high-level summary of incident information, including the following:

- Total cost currency
- Total cost
- Number of incidents
- Total incident actual effort

From this page, you can also create new incidents, reassign selected incidents or convert them to a task or to a project.

Note: See the *Demand Management User Guide* for more information.

To view or manage incidents

1. Open the investment.
2. Click the Incident subtab from the Properties tab.
The *Properties: Incidents* page appears.
3. View the list of investment incidents.
4. Do one of the following:
 - Review the incident summary or click the incident's short description to view incident details.
 - Create a new incident.
 - Select the check box next to each incident and do one of the following:
 - Click Reassign.
 - Click Convert to Task.
 - Click Convert to Project.

View or Define Dependencies

Dependency relationships may exist between one investment and another in your portfolio. Use the investment's *Properties: Dependencies* page to identify this relationship.

Dependencies can occur between the start and completion of conflicting work effort, or from budget overruns. From this page you can add investments with dependency constraints, and indicate if these investments are dependent on your investment or if your investment is dependent on them.

The dependency information you enter on this page influences the constraints you set on portfolio scenarios.

To view or define investment dependencies

1. With your investment open, click the Dependencies subtab on the Properties tab.

The investment's *Properties: Dependencies* page appears.

2. Select a mode to view or add the following:

- Investments that depend on this one. Displays other investments that are dependent on your investment.
- Investments this one depends on. Displays other investments that your investment is dependent on.

3. Click Add to add more dependencies to your investment.

The *Select Investments* page appears.

4. In the Investment Filter section, select an investment type from the Type drop-down, and click Add.

The *Properties: Dependencies* page appears.

How to Manage Baselines

Baselines are snapshots of your investment's total planned effort and cost estimates at the moment you capture it.

Baseline snapshots are static. The changes you make to your investment after you create a baseline will not automatically appear in the current baseline. However, you can update a baseline to include your newly entered or posted information.

To record the cost on your baseline, ensure the following:

- The Rate Matrix Extraction job is run.

Note: See the *Administration Guide* for more information.

- Investment staff members have rates defined.

Note: See the *Resource Management User Guide* for more information.

Use the investment's *Properties: Baseline Revisions* page to view a list of your investment's baselines. You can do the following:

- [Create or edit a baseline](#) (see page 41).
- [View baseline cost and usage](#) (see page 42).
- [Update the baseline at the investment level](#) (see page 42).
- [Delete baseline](#) (see page 42).

Current Baseline

The most recently created baseline becomes the investment's current baseline by default. Use the investment's *Properties: Baseline* page to determine which baseline is current.

If the investment has just one baseline, this baseline is marked as the current baseline and is displayed in the list with a yellow check mark in the Current column.

You can change the current baseline by editing the baseline's properties.

Create or Edit an Investment Baseline

Use the *Baseline Revisions Properties* page to create baselines (also known as baselining) or edit baseline properties.

Baselining often occurs the first time before resources times are entered. After the initial baseline, you can create baselines at various intervals, such as when different phases are completed, or at the investment's end. The initial baseline lets you to compare estimates to actuals once the investment is under way.

To create or edit a baseline

1. With your investment open, click the Baseline subtab on the Properties tab.
The investment's *Properties: Baseline Revisions* page appears.

2. Do one of the following:

- Click New to create a new baseline.
- Click the Revision Name link to edit a baseline.

The *Baseline Revision Properties* page appears.

3. Complete the following fields:

Revision Name

Defines the name for the baseline, such as Initial Variations, Midterm Variations, or Final Variations.

Revision ID

Defines the revision number or name for the baseline version number, such as v1 or r5.

Description

Defines the description for the baseline.

Current Revision

Indicates if this baseline is the current baseline. You can only select this check box when multiple revisions exist.

4. Click Submit.

The investment's *Properties: Baseline* page appears.

Cost and Usage Data from Baselines

Use the columns on the investment's *Properties: Baseline Revisions* page to view the following work allocation and cost information at the time of the baseline:

- Usage. Total effort (actuals plus remaining ETC) to date.
- BCWP. Budgeted Cost of Work Performed to date. This is calculated based on the cost/rate matrices that have been applied to the investment.

You can use baselines to perform an Earned Value Analysis (EVA) on investment performance. An EVA tells you how much effort you have spent to date on the investment.

Important! You must assign a cost/rate matrix to your investment for planned cost of work performed (BWCP) and earned value data to be visible.

Update Baselines at the Investment Level

You can update an existing baseline rather than create a new one. For example, you might want to update an existing baseline to include data from recently posted actuals. Updating a baseline changes its values accordingly and sets it as the current baseline.

To update the baseline

1. With the investment open, click the Baseline subtab on the Properties tab.
The investment's *Properties: Baseline* page appears.
2. Select the check box next to the baseline you want to update.
3. Click Update Baseline.
The *Confirm Revision Update* message appears:
4. Click Yes.
The investment's *Properties: Baseline* page appears with the updated baseline.

Delete a Baseline

If you delete the current revision baseline and there is more than one baseline, then the most recent baseline becomes the current revision.

To delete a baseline

1. With the investment open, click the Baseline subtab on the Properties tab.
The investment's *Properties: Baseline Revisions* page appears.
2. Select the check box next to the baseline and click Delete.
The baseline revision is removed from the list.

Approve Investments

The core decision to fund an investment and not fund another is fundamental to portfolio management. You do this by approving the investment or deciding that the investment should be rejected. Use CA Clarity PPM to track and manage both approved and unapproved investments.

Before you can approve an investment, verify that there are no initiated and running processes that have set the investment's status to display-only.

To approve an investment

1. Open the investment.
The general properties for investment appears.
2. Select Approved from the Status drop-down from the General section.

Capacity Planning Scenarios

Scenarios allow you to apply a systematic methodology to optimize your investment or portfolio. Apply scenarios to your investment to analyze how staffing changes or shifts in dates affect the outcome of your investment or portfolio. You can evaluate your investments by switching between a scenario and the plan of record. You can also compare two scenarios against each other.

Create Capacity Planning Scenarios

You can create a capacity planning scenario from any investment page that displays the scenario toolbar. The scenario toolbar displays below the page toolbar.

You must create it from within a portfolio. You cannot create portfolio scenarios from your scenario.

Apply Capacity Planning Scenarios to Investments

Use the scenario toolbar to select any existing capacity planning scenarios to which you have access rights (including any portfolio scenarios). When you open an investment and choose a scenario from a capacity planning scenario-enabled page, the scenario is set as the current scenario.

Hierarchies

You can manage the investments, services, and ideas that comprise your investment from the investment's hierarchy.

You can see your investments hierarchical lists—the projects, assets, applications, products, services, and other work from the Hierarchies tab. The following subtabs are available:

- Financial rollup
- Effort rollup
- Parents

Both the financial rollup and the effort rollup are hierarchical representations of the investments, services, and ideas that comprise your investment. You can expand and collapse the items listed on this page as well as add and remove child investments.

In the hierarchy, the Self line item displays the work values or costs that are specific to your investment, the parent service, depending on the view you have selected. The line items that lie below the Self line item are the child investments, services, and ideas that comprise your investment and the work values or costs specific to those child investments.

About Financial Rollup

The hierarchy displays an aggregation of the child investment, service, or idea's costs, planned, actual, and remaining. The values displayed are time-varying and factor in the investment allocation percentages that you have defined.

The value displayed in the Planned Cost column fields are the planned costs (forecasted and budgeted) that are rolled up from the child investment, service, or idea after the investment allocation percentages are factored in. The value displayed in the Actual Cost column fields are the costs that are incurred from billing and invoices. Like the planned cost, the actual costs are also rolled up from the child investment or service after the investment allocation percentage are factored in. If the investment is unapproved, that is the investment's status is something other than "Approved", actual costs do not display on the financial rollup because costs have yet to be incurred. The value displayed in the remaining Remaining Cost column is the difference between the planned costs and the actual costs.

The Planned ROI and Planned NPV columns display the child investment, service, or idea ROI and NPV, and the Planned Benefit column displays the planned revenue (the sum of the planned benefit and forecast benefit from the investment, service, or idea's detailed budget).

Filter the List of Child Investments

By default, both the financial and effort rollup for an investment display a list of approved and unapproved child investments and services. You can choose to view only approved child investments and services or unapproved child investments and services by choosing the status from the Status field in the filter section of the page.

Note: See the *Common Features and Personal Options User Guide* for more information.

How to Build a Hierarchy

You can add and remove child investments, services, and ideas to and from your investment's hierarchy based on your company's business rules. The child investments, services, and ideas that are available for you to add to your investment are those to which you have view access rights and those that are associated to the same entity as your investment. Use the investment's *Hierarchy: Financial Rollup* or *Hierarchy: Effort Rollup* page to add or remove associations of investments to your investment's hierarchy.

As you build your hierarchy, the associated child investment planned costs are rolled up to your investment, the parent investment, as planned costs and are displayed on the financial rollup. Similarly, the associated child investment aggregated work values are rolled up to the parent investment and are displayed on the effort rollup.

Do the following to build an investment hierarchy:

- [Add child investments](#) (see page 46).
- [Remove child investments](#) (see page 46).
- [View the financial rollup](#) (see page 47).
- [Define allocations for child investments](#) (see page 48).

Add Child Investments and Services from the Financial Rollup

You can add child investments, services, and ideas to your investment from the investment's *Hierarchy: Financial Rollup* or *Hierarchy: Effort Rollup* page. Use the *Select Investments* page to choose one or more child investment to add to your investment.

Before adding investments, services, and ideas to your hierarchy, make sure that you have added them in CA Clarity PPM. You should also work with the other investment managers to determine and define the investment allocations for each of the child investments you are adding to the hierarchy.

To add an investment from your investment's financial rollup, click Add Child, select the check box next to the investment, service, or idea you want to add, and then click Add.

Remove Child Investments or Services from the Financial Rollup

To remove a child investment or service from the hierarchy

1. Open the investment from which you want to remove child investments or services.

The investment's *Properties: Main - General* page appears.

2. Select the Hierarchy tab.

The *Hierarchy: Financial Rollup* page appears by default.

3. Select the check box next to the child investment you want to remove from the investment, and then click Remove.
4. Click Yes to confirm.

View the Financial Rollup

You can view the investment's financial rollup on the investment's *Hierarchy: Financial Rollup* page. This page displays a hierarchical list of the child investments, services, and ideas that comprise your investment. All of the child investment's costs and benefits are rolled up to your investment, the parent investment, and are listed on the parent investment's line item.

From this page you can track the costs incurred to build, maintain, and support your investment—allocation percentages, planned costs, actual costs, remaining costs, planned benefits, planned ROI, and planned NPV—and any other metric that are applicable to the investment as a whole, as well as add and remove child investments to and from the investment.

To view the financial rollup

1. Open the investment from which you want to view the financial rollup.
The investment's *Properties: Main - General* page appears.
2. Select the Hierarchy tab.
The *Hierarchy: Financial Rollup* page appears by default.
3. View the list of investments.

Define Child Investment Allocations

When you first add a child investment or service to your investment, its investment allocation is set at 100 percent by default. You can view the amount a child investment is allocated to your investment from the allocation amount listed in the **Allocation** column on your investment's financial and effort rollup.

Use the *Set Allocations* page to define the percentage amount a child service, investment, or idea is allocated to your investment. This page displays a list of the parent investments to which an investment is allocated. You can distribute the amount the child investment is allocated to its parent investments by editing the **Allocation** field.

To define a child investment or service's allocation to your investment

1. Open the investment to which you want to define child investment allocations.

The investment's *Properties: Main - General* page appears.

2. Select the Hierarchy tab.

The investment's *Hierarchy: Financial Rollup* page appears by default.

3. Click Parents.

The investment's *Hierarchy: Parents* page appears.

4. Click the allocation amount for the child investment or service you want to define.

The *Set Allocations* page appears.

5. In the Allocation field for your investment, enter the amount this child investment is allocated to your investment, the parent investment.

6. Click Save.

Return to the Investment

When you define the amount that a child investment or service is allocated to your investment, you are defining this amount on the child investment's *Hierarchy: Parents* page. If you accessed this page by drilling down on the **Allocations** field from within your investment's hierarchy, you can return to the parent investment by clicking the **Back** button that displays on the page.

View Effort Rollup

Use the investment's *Hierarchy: Effort Rollup* page to view the effort rollup of the investments, services, and ideas that comprise your investment. This page displays the aggregation of the investment's child investment labor-related information—such as ETC, EAC, and work variances—while taking into account the child investment's allocation percentages. You can view these totals in the ETC, EAC, and Actual Work columns on this page.

The investments that display on this page are the same investments displayed on the investment's *Hierarchy: Financial Rollup* page. This page provides another view of the hierarchical list of child investments.

You can establish the hierarchy when you select a parent investment from the child investment's general properties page.

To view the effort rollup

1. Open the investment you want to view.
The investment's *Properties: Main - General* page appears.
2. Select the Hierarchy tab.
The investment's *Hierarchy: Financial Rollup* page appears by default.
3. Select the Effort Rollup subtab on the page toolbar.
The investment's *Hierarchy: Effort Rollup* page appears.
4. View the list of investments.

View Total Cost of Ownership

The total cost of ownership (TCO) is the aggregated amount of running or operating an investment, including the investments, services, and ideas that support the investment. The TCO tracks where costs are being spent, how costs are being shared. You can manage costs to keep on budget proactively.

Once you have added all of the child investments to the investment, you can view the aggregated cost and labor totals from the hierarchical bill of investments to determine the investment TCO.

How to Manage Parent Investments

Use the investment's *Hierarchy: Parents* page to view a list of parent investments and services to which your investment is allocated and to view the percentage your investment is allocated to each parent.

Note: Child investment cost totals are automatically aggregated to the parent investment based on the investment allocation percentages.

You can also use this page to add parent investments to the investment.

You can do the following:

- [Add or remove parent investments](#) (see page 51).
- [Define parent investment allocations](#) (see page 52).

You can add any investment to which you have access rights as a parent investment to your investment.

How to Share Investments Across Investments

You can share investments among other investments, services, and ideas.

For example, do the following to share a database server that will support two software applications:

1. Add the two software applications as child investments to the database server's investment hierarchy
2. Edit the child investment's cost allocation percentage and time segments.

Your investment's investment allocation percentage dictates the amount that the investment is allocated to the parent investment, service, or idea. All cost information displayed in the investment hierarchy are based on the allocation percentages.

Add and Remove Parent Investments

You can add and remove parent investment associations to and from your investment based on your company's business rules. You do this on the investment's *Hierarchy: Parents* page.

Add Parent Investments

Use the investment's *Hierarchy: Parents* page to add a parent investment association to your investment. You can choose to add one parent investment or you can add multiple investments at one time.

To add a parent investment to the investment

1. Open the investment to which you want to add a parent investment association.
The investment's *Properties: Main - General* page appears.
2. Select the Hierarchy tab.
The investment's *Hierarchy: Financial Rollup* page appears by default.
3. Select the Parents subtab.
The investment's *Hierarchy: Parents* page appears.
4. Click Add.
The *Select Investments* page appears.
5. Select the check box next to the parent investment you want to add, and then click Add.

Remove Parent Investments

To remove a parent investment from the investment

1. Open the investment from which you want to remove a parent investment association.
The investment's *Properties: Main - General* page appears.
2. Select the Hierarchy tab.
The investment's *Hierarchy: Financial Rollup* page appears by default.
3. Select the Parents subtab.
The investment's *Hierarchy: Parents* page appears.
4. Select the check box next to the parent investment you want to remove from the investment, and then click Remove.
5. Click Yes to confirm.

Define Parent Investment Allocations

Investments and services can be allocated to one or more child investments or services, however the total allocation percentage for a parent investment must equal 100 percent. You can view your investment's parent investments allocation amounts on the investment's *Hierarchy: Parents* page.

To edit or define the percentage allocation of a parent investment

On the investment's *Hierarchy: Parents* page, use the parent investment's Allocation field.

Alternatively, investment's *Hierarchy: Financial Rollup page* or the investment's *Hierarchy: Effort Rollup page*, click the percentage allocation amount. The *Set Allocations* page appears. Change the allocation as desired and save.

Investment Team

Team members are the core elements of an investment. Both are essential to meeting investment objectives. Team members are necessary to generate ideas and monitor progress. Once the investment is underway, staff can record actuals for time spent on investments. Investment managers can then compare actuals to estimates for planning, tracking, and budgeting purposes.

You can staff your investments by allocating roles and resources. Use the investment's *Team* tab to do this. You can add both labor and non-labor resources. From this page you can view the bottom-up aggregated work effort by role. You can toggle the view to edit the investment's direct planned work. The *Team* tab has the following subtabs—Staff, Detail, Role Capacity.

To use the rates from newly added staff member in your investment's calculations and in baselines, make sure the Rate Matrix Extraction job is run.

Note: Contact your administrator or see the *Administration Guide* for more information. about running jobs.

To view the investment's *Team: Staff* page, open the investment and select the Team tab.

About the Team: Staff Page

Staff members are resources or roles that can be assigned to work on an investment and can record the time they work on the investment on their timesheet. Investments are not associated with tasks and staffing them does not result in long term commitments for that staff.

You can use a role as a placeholder when you do not know the name of the resource you want to staff on your investment, or if the resource you want to staff on your investment is not available. You can staff your investment with multiple instances of a role, but you cannot add multiple instances of a resource.

Use the investment's *Team: Staff* page to add staff to your investment. The following columns and icons appear on this page:

Properties icon

Opens the resource's profile. On this page you can view profile information and change allocations, including planned and hard allocations.

Note: See the *Resource Management User Guide* for more information.

Resource Finder icon

Opens the *Find Resources* page for the selected resource. On this page, you can replace the resource or role with a different resource or role.

Total Actuals column

Displays the aggregated total actual time posted against this investment. This value is the sum of the allocated actuals and the incident actuals.

Resource Allocation column

Opens the *Resource/Role Allocations* page. On this page, you can update the resource's allocation.

Role column

Displays the resource's role. This may be different from the primary role selected in the resource's profile.

Time column

Displays a yellow check mark if the resource or role is allowed to enter time for this investment.

Booking Status column

Displays the resource or role's booking status.

Values

- Hard. The resource has been committed to this investment
- Soft. The resource has been tentatively scheduled for this investment.
- Mixed. Both soft and hard allocation exists for the resource.

Start column

Displays the team member's allocation start date. If this date is not defined, the default is the start date of the investment.

Finish column

Displays the team member's allocation finish date. If this date is not defined, the default is the finish date of the investment.

% Allocation column

Displays percentage this team member is allocated to the investment.

Allocation column

Displays the number of hours the resource has been tentatively booked to this investment. Unless you change the booking dates, staff members are automatically booked for the entire duration. You cannot directly edit the allocation, but change allocation using the following:

- The setting allocation options.
- The new allocation curves defined on the resource's *Staff Member Properties* page.
- The Shift Allocation option

Allocated Actuals column

Displays the total number of hours the resource has to date on this investment.

Incident Actuals column

Displays the time posted to incidents associated with this investment.

Total Actuals column

Displays the aggregated total actual time posted against this investment. This value is the sum of the allocated actuals and the incident actuals.

How to Staff a Team

You can do the following to staff an investment team:

- [Add resources or roles](#) (see page 55).
- [Book overallocated resources](#) (see page 56).
- [Edit staff member details](#) (see page 56).

Add Resources or Roles to the Staff

The investment's *Team: Staff* page displays a list of the resources or roles that have been added to the investment. All resources are automatically allocated at 100 percent of their available working days. You can adjust this value to meet your needs.

When adding resources to your investment staff, the resource may be over-allocated. If this occurs a confirmation page appears that allows you to either over-allocate the resource, or to accept any remaining availability the resource might have.

You can add multiple instances of a role to an investment but not multiple instances of the same named resource. For example, you can assign your investment a "programmer (1)" and a "programmer (2)" to represent two different requirements for a resource with a programming role.

To add a resource or role to the investment's staff

1. Open your investment.

The investment's *Properties: Main - General* page appears.

2. Select the Team tab.

The investment's *Team: Staff* page appears.

3. Click Add.

The *Select Resources* page appears.

Note: To add team members to your investment at the OBS level, from the investment's *Team: Staff* page, click Add/Update by OBS. This option adds all of the resources in the selected OBS unit to your investment.

4. Select the resources and/or roles you want to add to the investment staff. Use the Search Filter to find resources or roles by name or other criteria.
5. Click Add to add the resources or roles you selected.

Book Over-allocated Resources

If a resource's available hours are less than the total number of requested hours, the *Remaining Availability Confirmation* page appears.

The *Remaining Availability Confirmation* page indicates that the resource will be overbooked if you add them to the investment. The 100% Resource Allocation column lists the number of hours that will be used if you book the resource at 100 percent of their availability, which is the default booking percentage. The Remaining Availability column indicates the actual number of work hours the resource has available to work on the investment.

When this confirmation page appears, select one of the following options:

Overallocate

Over-allocate the resource.

Remaining Only

Books the resource for the amount listed in the Remaining Availability column.

Edit Staff Member Details

Once you have added the resource or role to your investment, use the resource's *Staff Member Properties* page to specify the details for that staffing requirement.

To edit staff member details

1. Open your investment.

The investment's *Properties: Main - General* page appears.

2. Select the Team tab.

The investment's *Team: Staff* page appears.

3. Click the Properties icon for the resource or role to specify the details for that staffing requirement.

The resource's *Staff Member Properties* page appears.

4. Complete the following fields:

Start Date

Defines the team member's allocation start date for this investment.

Default: The investment's start date.

Finish Date

Defines the team member's allocation finish date for this investment.

Default: The investment's finish date.

Default % Allocation

Defines the percentage of time you want the resource to be allocated to this investment (you can enter "0%"). This change updates the Allocation and Allocation % columns on the investment's *Team: Staff* page.

Booking Status

Indicates the staff member's booking status. Staff members can either be soft, hard, or mixed booked.

The booking status is set automatically when team members are booked or their allocation changes. Set the booking status manually as desired.

Values:

- Soft
- Hard
- Mixed. Indicates that both soft and hard allocation exist for the team member.

Note: Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Request status

Determines the staffing requirement. Select another status from the drop-down.

Default: Set to "New" when you first create a staffing requirement because you have not yet asked the resource manager to fill the staffing needs.

Investment Role

Defines the role for which resources are being requested for this investment. For example, developer, business analyst, or architect.

Staff OBS Unit

Defines the Staff OBS Unit.

Default: The investment's Staff OBS Unit value if one is defined.

Note: See the *Project Management User Guide* for more information.

Planned Allocation

Defines the total amount of time the resource is allocated to this investment as requested by the investment manager.

Hard Allocation

Defines the total amount of hard-booked allocation the resource has to this investment (as entered by the resource manager).

There is no hard allocation value until the resource manager hard-books the allocations.

5. Click Submit.

Role Capacity

The investment's *Team: Role Capacity* page provides an aggregated view of all role demand whether generated by role-based team members or named resources. You can view this information against the capacity of the resources that fill those roles.

To access this page, from an investment's Team tab, select the Role Capacity subtab. Resources without a team role are captured on this page in the [No Role] row.

From the role capacity page you can view the following:

- Role allocation to this investment versus allocation to other investments and over-allocations. Data is aggregated by role through the investments hierarchy and each sub-investment allocates a specific percentage to the investment.
- Available role capacity for this investment and sub-investments.

You can view this information both inside and outside of a scenario. If a role appears over-allocated, click the Staff icon to go to the investment's *Team: Staff* page and see all resources using that role.

Staff Allocations

A staff's allocation is the period during which a resource is booked to an investment. Unless you change the booking dates, staff members are automatically booked for the entire duration of the investment. An allocation amount for each resource is calculated by multiplying the total number of working days between the investment's start and finish dates (including the start and finish dates) with the number of hours the resource is available to work each day. ETC is based on the number of hours a resource is assigned to the investment.

View and Edit Staff Allocations on Investments

You can use the investment's *Team: Staff* page to edit some of your allocation-related staff information when the page is in Edit Mode.

To view this page, from any investment properties page, select the Team tab, and then select the Staff subtab from the toolbar.

To edit staff allocations

1. Open your investment.

The investment's *Properties: Main - General* page appears.

2. Select the Team tab.

The investment's *Team: Staff* page appears by default.

3. Choose Edit Mode from the Actions menu.

4. Change the following fields as desired:

Role

Defines the resource's role for the investment. Click the Browse icon to select a role.

Time

Indicates whether this resource can enter time for work completed on this investment.

Booking Status

Indicates the resource's booking status for this investment.

Start and Finish

Defines the start and finish dates this resource is booked to this investment. Any changes made will also update the value in the Allocation column.

% Allocation

Defines the default amount this resource is allocated to this investment. You can enter 0 (zero) as the allocation percentage. Any changes made will also update the value in the Allocation column.

5. Click Save.
6. Choose Display Mode from the Actions menu to return to the investment's *Team: Staff* page and view your changes.

Reset Staff Allocations on Investments

You can reset your investment staff allocations in the following ways:

- **Shift Allocation.** When you want to shift or scale all or a portion of the resource allocations in an investment by moving resource allocations back and forward in time.
- **Set Allocation.** When you want to update the allocation of multiple team members at the same time.
- **Estimate from Allocation.** When you want to update the ETC to align with team member allocation for assigned resources. This option allows you to update selected resources to reset ETC to match allocation changes caused by changes in resource calendars.
- **Commit Planned Allocation.** When you want to reset the hard allocation for a resource to match the planned allocation.
- **Accept Hard Allocation.** When you want to reset the planned allocation for a resource to match the hard-booked allocation.

These options are available from the More button on the investment *Team: Staff* and *Team: Detail* pages.

Shift and Scale Resource Allocations on Investments

You can shift or scale all or a portion of the resource allocations in an investment by moving resource allocations back and forward in time. As you move data, segmented allocation dates are kept intact, even when the percent allocated for each segment changes. Shifting a resource allocation is useful when you want to investment allocations beyond the allowable time-scaled view, which can only extend for six months.

Use the Shift Allocation option that is available on the investment *Team: Staff* and *Team: Detail* pages.

As an example, consider an allocation that starts on May 1, continues at its default rate of 100% through the end of May, then goes through June at the reduced allocation of 50%. In this case, if you shift the allocation to start on June 1, it will go from June 1 through July 2 (for 31 calendar days) at 100%, then through August 2 at 50%. You can also shift allocations for time spans that contain no segments.

To shift or scale a resource allocation

1. Open the investment, and select the Team tab.
The investment *Team: Staff* page appears by default.
2. On the investment *Team: Staff* or *Team: Detail* page, select the check box next to the resource whose allocations you want to shift. Click More and select Shift Allocation.

The *Shift Allocation* page for that resource appears.

3. In the Time Span to Shift section, click the Select Date icon to change the start and finish dates that the resource is allocated to work on this investment. Data shifts according to the dates you enter in these fields.
4. In the Time Shift Parameters section, do the following:
 - At Shift to Date, click the Select Date icon to choose a new beginning date for the data that has been shifted. If this field is left empty, no shifting occurs.
 - At Shift Cut-Off Date, click the Select Date icon to choose the last date to which data can be shifted. You cannot shift allocations beyond this date.
 - At Scale Allocation % By, enter the percentage change in the allocation to make in conjunction with the shift. If this field is left empty, no scaling occurs.
5. Click Submit.

The changes you made are reflected in the Allocation column on the investment *Team: Staff* page.

Set Allocations for Multiple Team Members on Investments

You can set the allocations of multiple team members with one action at the same time. Use the Set Allocation option that is available by clicking More on the investment *Team: Staff* page or *Team: Detail* pages.

To update the allocation for multiple team members at the same time

1. Open the investment.

The investment *Properties: Main - General* page appears.
2. Select the Team tab.

The investment *Team: Staff* page appears by default.
3. Select the check box next to the team members for whom you want to update allocation.
4. Click More and choose Set Allocation.

The *Set Allocation* page appears.
5. In the General section of the page, set the following allocations for the selected team members:
 - Start Date. Enter or select the resource start date on the investment. Select the Reset to Match Investment Start Date check box to reset the resource staffing requirements on this investment to match the investment start date.

- End Date. Enter or select the resource end date on the investment. Select the Reset to Match Investment Finish Date check box to reset the resource staffing requirements on this investment to match the investment finish date.
 - Default Allocation %. Enter or select the resource allocation to the investment.
6. To remove all allocation segments for the selected team members, in the Existing Allocation Segments section of the page, select the Clear existing allocation segments check box.
 7. To create an allocation segment for the selected team members, complete the following fields in the New Allocation Segments section of the page:
 - Start. Enter or select the resource start date on the investment.
 - End. Enter or select the resource end date on the investment.
 - % Allocation. Enter or select the resource allocation to the investment.
 8. Click Submit.

Update ETC to Align with Team Member Allocation

You can update the ETC to align with team member allocation for assigned resources using the Estimate from Allocation option on the *Team: Staff* or *Team: Detail* pages.

To align ETC with team member allocation

1. Open your investment.
The investment *Properties: Main - General* page appears.
2. Select the Team tab.
The investment *Team: Staff* page appears by default.
3. Select the check box next to the resource for which you want to update ETC to align with allocation.
4. Click More and select Estimate from Allocation.
A prompt appears asking you to confirm the action.
5. Click Yes to confirm.

Commit Resource Planned Allocation on Investments

When you commit a resource planned allocation you set the resource hard allocation to be equal to the planned allocation. Do this after editing the planned allocation segment for a resource if you want to hard-book those segments. When a resource has a hard booking status, that resource is fully committed.

The Commit Planned Allocation option is available by clicking More on the investment *Team: Staff* and *Team: Detail* pages.

Committing planned allocation does not reset the default allocation percentage; it copies the planned allocation into the Hard Allocation section of the resource *Staff Member Properties* page.

The Hard Allocation section displays on the page depending on your project management Allow Mixed Booking setting that is available as a default project management option. **Note:** Contact your administrator or see the *Administration Guide* for more information.

To commit all planned allocation

1. Open your investment.
The investment *Properties: Main - General* page appears.
2. Select the Team tab.
The investment *Team: Staff* page appears by default.
3. Select the check box next to the resource for which you want to commit planned allocation.
4. Click More and select Commit Planned Allocation.
A prompt appears asking you to confirm the action.
5. Click Yes to confirm.

Accept Resource Hard Allocation on Investments

Use the Accept Hard Allocation option to reset a resource planned allocation to be equal to the hard-booked allocation. If soft-booked planned segments displayed in the Planned Allocation section, they are removed and all segments are reset to equal the hard-booked segment.

The Accept Hard Allocation option displays on the page depending on your Mixed Booking settings.

Note: Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

To accept hard allocations for a resource

1. Open your investment.
The investment *Properties: Main - General* page appears.
2. Select the Team tab.
The investment *Team: Staff* page appears by default.
3. Select the resource for which you want to accept hard allocation.
4. Click More and select Accept Hard Allocation.

This sets the planned allocation to equal committed allocation. Accordingly, the % Allocation and Allocation column values can change. The Booking Status value displays as "Hard" since all the allocation is fully committed.

Edit Resource Allocations on Investments

The investment's *Team: Detail* page lists planned and committed allocation for an investment by resource by time period in a graph format. This view helps you determine if a resource is overbooked or underbooked and by how much. You can also ascertain a resource's availability for an investment.

When this page is in edit mode, you can edit information such as the time cells for each resource. Changing the time cells changes the way planned and committed allocation is presented in the graph. To make the fields on this page editable, choose Edit Mode from the Actions menu. When you have finished editing, choose Display Mode from the Actions menu to view your changes.

To view this page, select the Team tab, and then select the Detail subtab from the page toolbar. The following image shows the *Asset Team: Detail* page.

Data on the detail page is displayed by resource, allocation, and time period. Scrolling over a time period displays a note providing you with a brief summary of what you see. The time period columns are, by default, set to weekly, and always start with the current week. The allocation color code works as follows:

- Yellow—Resource is allocated at or under availability for that time period.
- Red—Resource is over-allocated (i.e. the amount of time booked exceeds availability) for that time period.
- Green—Allocation to other investments, ideas, or services.

You can change many of the time-related values on this page.

Note: See the *Common Features and Personal Options User Guide* for more information.

Change Resource Default Allocation on Investments

You can use the Planned Allocation and Hard Allocation sections on a resource's *Staff Member Properties* page to indicate any deviations from the Default % Allocation field. You can unbook a hard-booked resource or extend a resource to do additional planning.

While the Planned Allocation curve represents the default or total allocation amount requested by the investment manager, the Hard Allocation curve represents the allocation amount actually committed by the resource manager. The booking status for a resource changes according to the allocation amounts in the planned and hard allocation curves.

For example, suppose a resource's planned or default allocation is 100 percent. Suppose he is booked to work on your investment from 8/05 through 11/05, but that he is also scheduled to work on another investment 50 percent of the time through September 1st, and, in addition, plans to be on vacation from September 15th through September 22nd. In this case, you could create two allocation curves for him: one that indicates a deviation to 50 percent from 8/01/05 through 9/01/05, and another that indicates a deviation to 0% from 9/15/05 to 9/22/05.

To change the default allocation for a resource

1. Open your investment.
The investment's *Properties: Main - General* page appears.
2. Select the Team tab.
The investment's *Team: Staff* page appears by default.
3. From either the investment's *Team: Staff* or *Team: Detail* page, click the Properties icon for the resource for which you want to change allocation.
The resource's *Staff Member Properties* page appears. This page displays some of the basic profile fields and a number of editable allocation-related fields.
4. At Default % Allocation, enter the percentage of time you want the resource to be allocated to this investment (you can enter "0%").
The change you make here will be reflected in the Allocation and Allocation % columns on the investment's *Team: Staff* page.
5. In the Planned Allocation and Hard Allocation sections, create one row for each deviation from the default allocation.
To use the short example preceding these steps, you would need to create two rows, one to cover the period where the resource actually works at 50% (compared to the 100% default or planned allocation), and another for the period where the resource actually works at 0% (compared to the 100% default or planned allocation).
6. To create a planned or hard allocation period:

- a. Enter or select a Start date for the period.
 - b. Enter or select a Finish date for the period.
 - c. Enter the percentage of time you expect them to work (as tentative or committed) in the **% Allocation** field. Note that you can enter "0%."
7. Click New Row to add another row and repeat Step 4.
8. When you are done, click Submit.

About Staff Member Replacement

You can replace a staff member assignment from the investment's *Team: Staff* page. Use the availability score to find a replacement at the team level. You also can replace a resource with a different resource, or replace a role with an actual resource.

Important! It is possible that the replacement process will over-allocate the member who is replacing the previous member or members.

Guidelines for Staff Member Replacements

Consider the following before making a staff member replacement:

When you replace a resource with a different resource, the actuals, pending actuals (if any), and baseline of the original staff member are not transferred to the new staff member. Only the remaining ETC is transferred to the new staff member.

The original staff member should complete time entries so that the actual data is posted before the replacement occurs.

The role of the original staff member is transferred to the new staff member (unless you are replacing a role with a different role).

How Data Transfers When Replacing Staff Members

The following table identifies how data from the replaced staff member transfers to the new staff member:

Data Type	Transfers
Available Start	Yes, if this date has not passed and if new resource is not booked on that date.
Available Finish	Yes
Remaining Allocation	Yes

Data Type	Transfers
Percent (%) Allocation	Yes
Investment Role	Yes
Existing Actuals	No
Pending Actuals	No
Baselines	No

Replace Staff Members

Use the investment's *Team: Staff* page to replace staff members assigned to your investment. When you do this, a list of resources who share the same role as the resource being replaced, and who are available during the investment's time period is generated. You can replace a resource using the staff or detail page.

Use this method when you want to use an availability score to help you select which resource would be best suited, in terms of availability, to replace the other. An availability score for each of the resources to which you have access is generated. This score indicates how close the availability of the possible replacement resources comes to being an exact match to the availability of the resource selected for replacement. Availability is based on the duration of the assignment and the daily availability of the resource. Generally speaking, the higher the score, the closer the match.

Use the *Find Resources* page to replace staff members. This page lists all of the resources to which you have access.

The Availability field identifies the assignment period and the number of hours the resource you are replacing was allocated to your investment. Both the dates and the hours allocated are transferred to the new replacement.

The Availability Match column displays a score that factors in the work period and the availability of each resource. If you do not add any skill specifications to your search criteria, the Total Match column will duplicate the Availability Match score and the Skill Match column will be blank. If you search by skills criteria as well as availability criteria, the Total Match column will display an average of the two scores.

The message at the top of the screen, "Match scores may be inaccurate if availability dates do not fall into the following range: ddmmyy - ddmmyy," means that if there is a discrepancy between the date range in the message and the dates in the Availability field, the Availability Match score might be inaccurate. For example, if the dates in the Availability field are 9/1/09 - 2/7/10 and the date range in the message is 9/7/09 - 9/7/10, a one-to-one comparison for any resource cannot be found, which lowers the overall availability match scores.

To replace a staff member on your investment

1. Open your investment.

The investment's *Properties: Main - General* page appears.

2. Select the Team tab.

The investment's *Team: Staff* page appears.

3. Next to the name of the staff member you want to replace, click the Resource Finder icon.

The *Find Resources* page appears.

4. Select the check box next to the resource with whom you want to replace the previous resource, and click Replace.

The *Booking Confirmation* page appears.

5. Confirm the selection by clicking Yes.

The investment's *Team: Staff* page appears, where you will see that the name of the resource you selected replaces the previous staff member.

Change Investment Staff Member Roles

You can change a staff member's role on an investment-by-investment basis. This does not change the role identified for them in their resource profile. You can replace a role assignment from either the investment's staff or detail page.

To change a staff member's role on your investment

1. Open your investment.

The investment's *Properties: Main - General* page appears.

2. Select the Team tab.

The investment's *Team: Staff* page appears.

3. Next to the name of the resource for which you want to change the role, click the Properties icon.

The resource's *Staff Member Properties* page appears.

4. In the General section of the page, for Investment Role, click the Browse icon.

The *Select Role's* window opens.

5. Select the role that you want to assign to the resource for this investment.
6. Click Add.
7. Click Submit to save your selection.

The investment's *Team: Staff* page appears, where you will see that the name of the resource's role has changed in the Role field.

Remove Staff Members from Investments

You can remove a staff member from your investment if the resource has not posted actuals to the investment and has no submitted actuals pending.

Removing a staff member from your investment does not also delete the resource, nor does it change the staff member's status to inactive.

To remove a staff member from your investment

1. Open the investment from which you want to remove a staff member.
The investment's *Properties: Main - General* page appears.
2. Select the Team tab.
The investment's *Team: Staff* page appears.
3. Select the check box next to the resource or role you want to remove, and then click Remove.
The *Remove Confirmation* page appears.
4. Confirm the selection by clicking Yes.
The investment's *Team: Staff* page appears, where you will see that the resource has been removed from the staff list.

Retire Investments

You can retire or decommission your investment once it has been completed and no further work is being done. When you retire an investment that has dependencies on other investments, such as a parent or child investment, the child investment's allocation is dynamically adjusted by the retire investment's finish date.

When you set the parent investment's finish date, the child investment's costs that occur after that date are not rolled up to the parent investment.

To retire an investment

1. Select the investment you want to retire.
2. Check the investment's *Hierarchy: Parents* page to see if the investment is allocated as a child to another investment.
If there are, work out a transition plan with each of the parent investment managers. If necessary, replace the investments that depend on this investment with other investments.
3. Go to the investment's *Properties: Main - Schedule* page and set the Finish date to the date you want the investment to retire.
4. Click Save.

Mark Investments for Deletion

Investments are deleted once the delete job for that investment type runs.

Note: Contact your administrator or see the *Administration Guide* for more information.

To mark an investment for deletion

1. From the list page for the investment type you want to delete, check the box next to the investment you want to delete.
2. Click Mark for Deletion.
The *Delete Confirmation* page appears.
3. Confirm the prompt by clicking Yes.
The selected investment is deleted and no longer displays in the list.

Chapter 3: Portfolios

This section contains the following topics:

[Portfolio Investment Overview](#) (see page 73)

[How to Work with Portfolios](#) (see page 74)

[Create New Portfolios](#) (see page 75)

[Open and Navigate Portfolios](#) (see page 78)

[Delete Portfolios](#) (see page 80)

Portfolio Investment Overview

Portfolio investment decisions should be made by comparing investment types of a similar type and role capacities in a portfolio. The types of investments determine the number of portfolios you will create and the type of portfolio you define.

You can create investment portfolios of varying types—projects, applications, products, assets, services, ideas, and other work. Once you have defined your company's IT requirements, create and define the portfolios that will include these investments.

How to Work with Portfolios

Use the *Portfolios* page to view a list of portfolios and to create new portfolios. The *Portfolios* page serves as a gateway to the portfolio's tab set—*Properties*, *Contents*, *Scenarios*, *Scorecard*, and *Analyze*—that you will use to define the various attributes of the portfolio.

To view this page, select Portfolios from the Portfolio Management menu.

From this page, you can do the following:

- [Create new portfolios](#) (see page 75).
- [Open a portfolio](#) (see page 78).
- [Edit portfolio properties](#) (see page 91).
- [Manage portfolio content](#) (see page 82).
- [Group portfolios with child/parent associations](#) (see page 95).
- [View portfolio scorecards](#) (see page 103).
- [Analyze portfolios graphically](#) (see page 119).
- [Delete portfolios](#) (see page 80).

You can also use this page to edit some of the portfolio's properties by choosing Edit Mode from the Actions drop-down.

You can filter, sort, and reconfigure the portfolio list. The portfolios that display in the list are sorted in ascending order by the portfolio's name. You can sort the list by clicking a column header.

Note: See the *Common Features and Personal Options User Guide* for more information.

Create New Portfolios

You can create a department portfolio or a generic portfolio. You can create and analyze Customer and Provider department portfolios.

- A department portfolio can include investments that belongs to the department or that it funds.
- A generic portfolio can include any or all investments. A generic is useful when you want to analyze a set of investments without the constraint of a department.

Once you have created the portfolio add investments and roles to the portfolio contents.

Note: See the *Common Features and Personal Options User Guide* for more information.

Use the *Create Portfolio* page to define the general properties of your portfolio. Most of the fields that display on this page can be updated on the *Portfolio Properties: General* page.

Portfolio scenarios inherit some of the same settings as the portfolio. The inherited fields appear on the *Scenario Properties* page as display-only.

To create a portfolio

1. Select Portfolios from the Portfolio Management menu.
The *Portfolios* page appears.
2. Click New.
The *Create Portfolio* page appears.
3. In the General section, complete the following required fields.

Portfolio Name

Defines the name of the portfolio.

Portfolio ID

Defines a unique identifier for the portfolio.

Layout

Defines the portfolio's page layout. Select a layout from the drop-down. The available layouts are company-specific and are dependent on the values that were set by your CA Clarity PPM administrator. Unless your CA Clarity PPM administrator has created other layouts and assigned you access rights to these layouts, this field is display-only.

Default: Portfolio Default Layout

Manager

Specifies the portfolio manager who can manage the portfolio's detailed properties. Click the Browse icon to open to select a portfolio manager.

Default: The resource that created the portfolio.

Start Date

Specifies date when the portfolio starts. This date indicates when portfolio analysis begins. Click the Select Date icon to select another date.

Default: The first day of the current system month.

Finish Date

The date when the portfolio ends. The date you enter here is the date on which portfolio analysis ends. Click the Select Date icon to select another date.

A portfolio's start and end date sets the boundary for an investment's cost and role capacity and demand.

Default: The last day of current system year.

Currency

Displays the currency code for the portfolio. Display-only if CA Clarity PPM is set up in single currency. When multi-currency is enabled, you can select a currency from the drop-down.

Planned Cost

Defines the amount of money available for investments in this portfolio.

Planned Benefit

Defines the amount of money expected in return from the investments in the portfolio.

Manage Costs Using

Specifies whether to manage the portfolio's cost values using total remaining planned cost values.

Values:

- Total Planned Cost. Choose this option to manage costs using the total planned cost.
- Remaining Planned Cost. Choose this option to display comparison data in the Remaining Cost column when comparing scenarios from the *Portfolio Scorecard* page. The remaining cost as defined by the portfolio dates are used during scenario generation.

Default: Total Planned Cost

Manage Capacity Using

Specifies whether to manage the portfolio's capacity values using total role capacity or remaining role capacity.

Values:

- Total Capacity
- Remaining Capacity. Choose this option to display comparison data when comparing scenarios from the *Portfolio Scorecard* page. Role capacity and demand are calculated from today to the portfolio finish date during scenario generation.

Default: Total Capacity

Capacity Unit Type

Specifies the unit in which capacity values are calculated and represented

Values: Hours (default) or FTE.

Portfolio Investment Types

Defines the type of investments included in this portfolio. You can select a single investment type or all investments. If you select a single investment type (for example, project), all supported fields on all tabs are based on the selected investment type.

Department

Specifies the department for which you are creating the portfolio. When you select a department, all investments that meet the criteria (that is, the selected portfolio type) are automatically made available to the portfolio. You cannot edit this field after creating the portfolio.

Portfolio Type

Select Customer if you want to analyze a portfolio of investments that the department is funding. Select Provider if you want to analyze a portfolio of investments that the department owns. You cannot edit this field after creating the portfolio.

Values: Customer or Provider.

4. Click Submit.

Open and Navigate Portfolios

The *Portfolios* page displays a list of all of the portfolios to which you have view, edit, or delete access rights. You can access this page to open an individual portfolio, create a new portfolio, or delete a portfolio.

To view portfolios

1. Select Portfolios from the Portfolio Management menu.

The *Portfolios* page appears.

2. Click the name of the portfolio you want to open.

The *Portfolio Scorecard* page opens.

3. To open another portfolio and keep the one in view open, select the name of a portfolio from the Portfolio drop-down on the toolbar.

Note that the Go to Associated Department link appears only for a portfolio that is associated with a department.

Navigate a Portfolio

With the portfolio open and in view, you can use the portfolio's tabs to navigate the portfolio. To view the portfolio's tabset, open the portfolio. The tabs appear above the portfolio's page toolbar.

Use the portfolio pages to specify the portfolio's properties, catalog investments, analyze portfolios, create portfolio scenarios, group portfolios, create portfolios, and delete portfolios.

About the Portfolio's Page Toolbar

From each portfolio page, the data you see on the page may be restricted via filter and view settings on the portfolio's page toolbar. This toolbar appears at the top of portfolio pages, below the portfolio's tabset.

The options available on the toolbar vary depending on what portfolio page you have in view.

The following list describes the view and settings that are available on portfolio page toolbars:

Portfolio

Allows you to view another portfolio. This view option appears on all portfolio pages.

Scenario

Allows you to apply a scenario to the portfolio that is in view. This filter option appears on the *Portfolio Analyze* and *Portfolio Scorecard* pages.

Portfolio Roles

Allows you to switch to another role included in the portfolio. This filter option appears on the *Portfolio Analyze* and *Portfolio Scorecard* pages.

Status

Allows you to choose to control which investment data is displayed in the portlets on the page. Choices are All, Approved, or Unapproved. This filter option appears on the *Portfolio Analyze* and *Portfolio Scorecard* pages.

Note: When you choose to view unapproved investments, all investments that have a status other than "Approved" display in the portlets on the page.

Compare To

Allows you to select a Compare Scenario so you can compare two different scenarios. This filter option appears on the *Portfolio Scorecard* and *Portfolio Analyze* pages.

Booking Status

Select a booking status to display different role allocation numbers in the portlets for that investment. If you select the "Hard" booking status, then the role allocation value shows only the hard booking allocation value of all resources of respective role. If you select "All," the role allocation value shows both soft and hard or total allocation.

This filter option appears on the *Portfolio Analyze* and *Portfolio Scorecard* pages.

Filter and Sort the Portfolios List

The *Portfolios* page displays a list of all of the portfolios to which you have access, in ascending order by the portfolio name. There may be some portfolios that do not display in this list because you do not have the access rights to view them.

When there are a large number of portfolios displayed in the list on the *Portfolios* page, the list can be very long and span multiple pages. Use the Portfolio Filter section to filter the list down to only those portfolios you want view or to locate a specific portfolio. To view this section of the page, open the portfolio. This section is the first section at the top of the page. If the section's state is collapsed, you may need to expand the filter in order to see the filter fields.

Note: See the *Common Features and Personal Options User Guide* for more information.

To sort the Portfolios list

Click a column header.

For example, to sort the list by Portfolio Name, click the Portfolio column header. When sorted, an arrow appears in the column header. To reverse the sort order, click the column header again. Do the same to sort by ID, Start, Finish, or Active.

Delete Portfolios

To delete an existing portfolio

1. Select Portfolios from the Portfolio Management menu.
The *Portfolios* page appears.
2. Check the box next to the portfolio you want to delete.
3. Click Delete.

The *Delete Confirmation* page appears.

4. Confirm the prompt by clicking Yes.

The selected portfolio is deleted and no longer displays in the list.

Chapter 4: Portfolio Content

This section contains the following topics:

[About Portfolio Content](#) (see page 81)

[About the Portfolio Contents Toolbar](#) (see page 81)

[How to Manage Portfolio Contents](#) (see page 82)

[Include and Exclude Portfolio Investments](#) (see page 83)

[Build Power Filters to Add Portfolio Investments](#) (see page 84)

[Update a List of Investments](#) (see page 84)

[Clear Portfolio Content Power Filters](#) (see page 85)

[Add and Remove Individual Portfolio Investments](#) (see page 86)

[Portfolio Roles](#) (see page 87)

About Portfolio Content

Portfolio content is all investments and roles being considered in your portfolio. All investment types—projects, applications, assets, ideas, products, services, departments, and other work—can be included in your portfolio.

Use the Include and Filter to display a list of investment types that are marked as included. They remain included in your portfolio unless you exclude them.

Typically, you will create a portfolio for each set of investments instead of mixing them together into one portfolio. You can later associate your portfolio to another as a child portfolio.

Note: You can also access the *Portfolio Contents* page from any portfolio page by selecting the Contents tab.

About the Portfolio Contents Toolbar

Use the page toolbar to determine which portfolio to present on the *Portfolio Contents* page. You can use this toolbar to switch from viewing one portfolio to another. This toolbar appears near the top of the page, below the Contents tab.

How to Manage Portfolio Contents

There are three methods available for you to add and remove contents to your portfolio. You can do the following:

- [Include investments of a particular investment type](#) (see page 83), such as assets, to your portfolio.
- [Build a power filter](#) (see page 84) associated with the a particular investment type, such as a power filter that filters for products within a given branch of an OBS. You can then re-evaluate the expression against any newly added products.
- [Add individual investments to your portfolio](#) (see page 86).

In addition to viewing a list of all of the investments being considered in your portfolio, you can use the *Portfolio: Contents* page to perform other portfolio tasks such as:

- [Include and exclude investments](#) (see page 83).
- [Update a list of Investments](#) (see page 84).
- [Add and remove Individual investments](#) (see page 86).
- [Build power filters to add investments](#) (see page 84).
- [Clear power filters](#) (see page 85).
- [Switch to view another portfolio](#) (see page 81).
- [Add roles to a portfolio](#) (see page 88).

Include and Exclude Portfolio Investments

When you first create your portfolio, its contents are empty. Investments all though available in the portfolio are not automatically added. For an investment to be added in the portfolio content, its investment type must be marked as "Included," or the investment must meet the conditions of the built power filter, or you must add it individually. Only those investments to which you have access rights are available for you to add to your portfolio.

Use the Include and Filter Investments section of the *Portfolio Contents* page to include and exclude investment types before adding portfolio investments. To view this page, open the portfolio, and then select the Contents tab.

For department portfolios, only the eligible investments are available for adding. For example, if you include the "Project" investment type, only those projects that meet the criteria (that is, provider or customer criteria depending on the portfolio type) are available for adding.

Include Investment Types

To include investment types, in the Include and Filter section of the *Portfolio Contents* page, check the box next to the name of the investment type you want to include, and click Include. Included investments have a yellow checkmark in the Included column. Included investments can be considered as potential portfolio content. You can then start adding individual investments from the included investment types.

You can exclude an investment type to leave out investments of that type.

Exclude Investment Types

To exclude investment types that were previously selected for inclusion, in the Include and Filter section of the *Portfolio Contents* page, check the box next to the investment type you want to exclude, and then click Exclude. Excluded investment types do not have a yellow checkmark in the Included column.

Build Power Filters to Add Portfolio Investments

Once you build a power filter for an investment type, you can choose to view the results of the expression before deciding to add them to the portfolio. The investments that match the selected investment type and meet the conditions of the power filter display in the Current Matching Investments section of the *View Matching Investments* page.

This page only lists the investments to which you have access rights and that are not also marked for deletion. This page only displays investments of one type at any given time.

To view this page, on the *Portfolio Contents* page, check the box next to the investment type, and click View Matching Investments.

To view a list of investments that have been added to CA Clarity PPM since you last synchronized matching investments, click Synchronize.

Update a List of Investments

Synchronizing an investment type ensures that all of the investments you created and that meet the conditions of the power filter are also added as content in your portfolio. It also ensures that those investments that no longer meet the conditions of the power filter are removed from the portfolio.

Once you have decided which investment types to include in your portfolio and built a power filter, you will need to periodically re-run the power filter to bring the list of investment up-to-date. The complete list of matching investments display on the *Synchronize Matching Investments* page. Use this page to view the list of investments that now match the power filter before adding them as content to your portfolio.

To view this page, on the *Portfolio Contents* page, check the box next to the included investment type, and click Synchronize. Newly added investments that match the power filter and investments that no longer match the power filter display in the Investments section of the *Synchronize Matching Investments* page. To bring the list up-to-date, click Synchronize.

Only those investments that meet the conditions specified in the power filter and that are not already included in the portfolio are displayed in the list.

Clear Portfolio Content Power Filters

When you have a power filter built that you no longer need, you can delete the power filter. If you need to modify the power filter's expression, instead of deleting the power filter, select the name of the power filter, clear the expression, and build a new one.

Note: See the *Common Features and Personal Options User Guide* for more information.

To clear a power filter from the *Portfolio Contents* page, check the box next to the name of the investment type to which the power filter is associated, and click Clear Power Filter.

Clearing power filters from the *Portfolio Contents* page does not remove those investments that match the power filter from the portfolio.

Add and Remove Individual Portfolio Investments

You can manually add investments of any type individually to your portfolio, regardless of its state. You can individually add investments before or after using power filters or instead of using power filters. Once added, these investments display in the Individual Investments section of the *Portfolio Contents* page.

Add Individual Investments to a Portfolio

To add an individual investment to your portfolio

1. Select Portfolios from the Portfolio Management menu.
The *Portfolios* page appears.
2. Click the name of the portfolio to which you want to add an investment.
The *Portfolio Scenarios* page appears by default.
3. Click the Contents tab.
The *Portfolio Contents* page appears.
4. In the Individual Investments section, click Add.
The *Select Investments* window opens. Only those investments to which you have view access rights display in the list.
5. Select the investment you want to add to the portfolio.
6. Do one of the following:
 - Click Add.
 - Alternatively, click Add and Select More until all of the selected investments are added. Click Close when you are finished.The *Select Investments* window closes. The selected investment is displayed in the list on the *Portfolio Contents* page.

Remove Individual Investments from a Portfolio

The investments that you have added individually to you portfolio display in the Individual Investments section of the *Portfolio Contents* page. To remove an investment, check the box next to the name of the investment, and then click Remove.

Portfolio Roles

You can plan a portfolio with a given budget cost and available roles capacity. This allows you to see the budget cost and allocations for specific roles via a list of investments on the Investments grid portlet. Portfolio dates are used to determine the capacity for each role.

Example: Creating a Portfolio with a Budget Cost and Available Roles

Bob, a portfolio manager wants to create a portfolio with a budget of \$2,000,000 and two key roles. He wants to see the budget cost and allocations for specific roles via a list of investments and plan a portfolio with the available budget cost and role capacity.

He logs in to CA Clarity PPM and creates a new portfolio with the following details:

- Budget cost: 2 million
- Portfolio date: May 2006 to May 2007
- Capacity unit type: FTE

Bob clicks the Contents tab and includes investment types he wants to model. He adds the key roles of developer and consultant around which he is interested in generating scenarios.

Next, he clicks the Scorecard tab to use the page-level filter to see:

- All the roles added to the portfolio. In this case he sees two values "Developer" and "Consultant."
 - The Role Demand column shows the demand for all resources assigned the roles on the portfolio investments.
 - The Role Actuals column shows the actual posted effort for all the roles.
 - The Remaining Role Allocation column shows the calculation of Role Demand minus Role Actuals.
- The Planned Cost, Actual Cost, and Remaining Cost columns.

This allows him to see role allocations and budget cost values to plan his portfolio. The list of investments on the Investments portlets allows him to compare his portfolio budgeted cost and role capacities against the values for his selected portfolio investments. Based on this analysis, he creates scenarios and excludes investments which do not fit his portfolio budget and role capacity.

Add Roles to a Portfolio

Use the Roles section on the *Portfolio Contents* page to add multiple primary roles and their capacity to your portfolio. The unit type (FTE or Hours) that you selected on the *Portfolio Properties* page is used to pre-populate role capacities in that unit and for displaying the role capacity and demand in the portfolio.

Role capacity is interpreted as the sum of capacity for all resources that have the selected role as their primary role. You can override the pre-populated capacity by entering a new value.

If a role added to the portfolio is made inactive (from the resource management pages), the portfolio still displays that role but does not include it in any calculations.

To add a role to your portfolio

1. Select Portfolios from the Portfolio Management menu.

The *Portfolios* page appears.

2. Click the name of the portfolio to which you want to add an investment.
3. Click the Contents tab.

The *Portfolio Contents* page appears.

4. In the Roles section, click Add.

The *Select Roles* window opens. Only those roles to which you have view access rights display in the list.

5. To filter by the role name:

- a. In the Roles Filter, enter a role name in the Name field.
- b. Click Filter.

6. Select the role you want to add to the portfolio.

7. Do one of the following:

- Click Add.
- Alternatively, click Add and Select More until all of the selected roles are added. Click Close when you are finished.

The *Select Roles* window closes. The selected role is displayed in the list on the *Portfolio Contents* page.

Remove Roles from a Portfolio

When a role is removed from the portfolio, it is also removed from any of the portfolio's scenarios which included the role.

To remove a role from a portfolio

1. Select Portfolios from the Portfolio Management menu.
The *Portfolios* page appears.
2. Click the name of the portfolio from which you want to remove roles.
The *Portfolio Scenarios* page appears.
3. Click the Contents tab.
The *Portfolio Contents* page appears.
4. In the Roles section, select the roles you want to remove and click Remove.

How Portfolio Role Capacity is Calculated

For each role added to the portfolio, only resources associated with the role as their primary role are factored into the total capacity for the duration of the portfolio.

Example

Suppose you are evaluating the capacity for the Developer role. If one developer works full time at 2080 hours and another works half-time at 1040 hours, the aggregated total capacity for the duration of the portfolio (one year in this case) is 3120 hours. The capacity depends on the date range in the portfolio.

Using the allocation percentage of each investment, allocation is aggregated along the Financial Rollup Hierarchy. For example, say a resource with a role Developer is allocated 100 percent to the Database Server and this asset is allocated 50 percent to the ACME service. You will see "ACME" in the investments list and its resource allocation for Developer role will be 50 percent of the total allocation for Developer for the Database Server asset. The aggregation recognizes that asset is allocated only 50 percent to the ACME service investment.

Refresh Portfolio Role Capacity

Once you save the roles that you added to your portfolio, the role capacity values do not change. You can refresh these values with the latest capacity for any role at any time. From the *Portfolio Contents* page, select the roles and click Refresh Capacity. Only the selected roles are refreshed.

Reset Portfolio Role Capacity

After changing the role capacities in a portfolio, you can change them back to the last saved values. From the *Portfolio Contents* page, select the roles you want to reset and click Reset.

Chapter 5: Portfolio Properties

This section contains the following topics:

[View and Modify Portfolio Properties](#) (see page 91)

[Use Portfolio Pages and Portlets](#) (see page 91)

View and Modify Portfolio Properties

Use the *Portfolio: Properties: General* page to complete or to modify the portfolio's general information. The general properties include the portfolio's name and ID, the portfolio's description, layout, manager, start and finish date, and budgeted cost and benefit.

To access this page, open the portfolio, and click the Properties tab. This page opens by default. You can also access this page from other properties pages by selecting the General link from the Properties content menu. This link is the first item on the content menu.

The fields that display on this page are the same fields that displayed when you first created your portfolio, on the *Create Portfolio* page.

Present Information on the Portfolio Properties Page

Use the page toolbar to determine which portfolio to present on the *Portfolio: Properties: General* page. You can use this toolbar to switch from viewing one portfolio to another. This toolbar appears near the top of the page, below the Properties tab.

Use Portfolio Pages and Portlets

You can configure the portlets on the *Portfolio Scorecard* and *Portfolio Analyze* pages. You can also personalize these pages to contain additional portlets or portlets of your choice.

Note: Only projects have baselines. You can add earned value fields to portfolio views but the view does not display information. Earned values fields are intended for projects only.

Choose Portlet Viewing Options

The investments that display for analysis on the *Portfolio Scorecard* and *Portfolio Analyze* page depend on the viewing options you choose from the page toolbar, whether they are part of the portfolio's contents, and whether certain portfolio attributes were defined. If you do not have access rights to view an investment, it will not appear for analysis.

At a more detailed level, you can filter to restrict what data is presented on a particular portlet. To do this, use the portlets filtering options. These options are visible when the portlet's filter section is expanded.

Note: See the *Common Features and Personal Options User Guide* for more information.

Maximize and Minimize Portlets

By default, the *Portfolio Scorecard* page's portlets are minimized to show all portlets on the page. The first portlet that displays at the top of the page is the Investment portlet. To view the other portlets on the page, use the scroll bar. You can also choose to have the page's portlets maximized so that only one portlet at a time is presented on the page. To maximize the page's portlets, click the Maximize icon on the portlet's toolbar.

When the page's portlets are maximized, you can present one of the other portlets you have available by choosing it from the Portlet drop-down.

To restore the portlet's settings to display the portlets as minimized (showing all portlets on the page), click the Restore icon.

Personalize and Configure Portfolio Pages

You can configure the portlets themselves to display different data, and configure the page by adding and removing portlets. You can also rename and remove tabs, rename and modify pages, and rename, modify, add and remove content from portfolio pages.

Note: See the *Common Features and Personal Options User Guide* for more information.

Chapter 6: Portfolio Groups

This section contains the following topics:

[Child Portfolios](#) (see page 93)

[How to Group Portfolios](#) (see page 93)

[View a List of Child Portfolios](#) (see page 94)

[Add Child/Parent Portfolio Associations](#) (see page 95)

[Roll Up Budgeted Costs from Child Portfolios](#) (see page 96)

[Distribute Budgeted Costs to Child Portfolios](#) (see page 97)

[Roll Up Budgeted Benefits from Child Portfolios](#) (see page 99)

[Distribute Budgeted Benefits to Child Portfolios](#) (see page 100)

[Remove Child Portfolio Associations](#) (see page 101)

Child Portfolios

Child portfolios allow you to associate one or more portfolios to a parent portfolio. Forming portfolio hierarchies gives you the flexibility to create a multi-level rollup of costs and benefits to a parent portfolio, or to distribute down costs and benefits to child portfolios.

In order to perform portfolio analysis at the parent portfolio level, you must manually add the child portfolio's investments to the parent portfolio.

How to Group Portfolios

You can group child portfolios within another portfolio to create a parent/child portfolio relationship. You can do the following:

- [Designate a portfolio as a child portfolio](#) (see page 95).
- [Roll up and distribute costs and benefits across portfolios](#) (see page 96).
- [Remove child portfolios from a parent](#) (see page 101).

View a List of Child Portfolios

Use the *Portfolio: Properties: Child Portfolios* page to view a list of the child portfolios associated to the portfolio currently in view. You can also use this page to remove a child portfolio association, roll up budgeted costs or benefits from child portfolios, distribute budgeted costs or benefits to child portfolios, link to the properties page for a parent portfolio by selecting the name of the portfolio in the list, and view the portfolio's budgeted values to determine if they should be rolled up from or pushed down to child portfolios. From this page you can associate one portfolio to another as a child portfolio.

To view a list of child portfolios

1. Open the portfolio, and click the Properties tab.

The *Portfolio: Properties: General* page appears.

2. Click Child Portfolios from the content menu.

The *Portfolio: Properties: Child Portfolios* page appears.

Add Child/Parent Portfolio Associations

Use the *Select Portfolios* window to associate one portfolio with another as a child portfolio. You can associate a portfolio as a child portfolio with only one parent portfolio at any given time. Any scenarios you have applied to a *parent* portfolio are also available to the child portfolio.

To designate a portfolio as a child portfolio

1. Click Portfolios from the Portfolio Management main menu.

The *Portfolios* page appears.

2. Select the name of the portfolio to which you want to distribute costs.

The *Portfolio Scenarios* page appears.

3. Click the Properties tab.

The *Portfolio: Properties* page appears.

4. Click Child Portfolios from the Properties content menu.

The *Portfolio Properties: Child Portfolios* page appears.

5. Click Add.

The *Select Portfolios* window opens. Portfolios that are not already associated to a portfolio are displayed in the list. If necessary, filter the list to limit the number of portfolios displayed.

6. Check the box next to the portfolio you want to add, and click Add. Alternatively, click Add and Select More until all of the selected portfolios are added.

7. Click Close.

The *Select Portfolios* window closes. The selected portfolio is displayed in the list on the *Portfolio Properties: Child Portfolios* page.

Roll Up Budgeted Costs from Child Portfolios

Rolling up the budgeted costs from child portfolios changes the total budgeted cost of the parent portfolio to match the sum of their budgeted costs. You can view the portfolio's budgeted benefit and cost amounts on the *Properties: General* page.

To roll up the budgeted costs

1. Click Portfolios from the Portfolio Management main menu.
The *Portfolios* page appears.
2. Select the name of the portfolio to which you want to distribute costs.
The *Portfolio Scenarios* page appears.
3. Select the Properties tab.
The *Portfolio: Properties* page appears.
4. Click Child Portfolios from the Properties content menu.
The *Portfolio Properties: Child Portfolios* page appears.
5. Click Rollup Costs.

Distribute Budgeted Costs to Child Portfolios

Use the *Portfolio Cost Distribution* page to distribute the budgeted cost from the parent portfolio to a set of child portfolios. On this page you can enter a percentage of the budgeted cost that will be distributed to each child portfolio.

To distribute the budgeted costs to child portfolio

1. From the main menu, under Portfolio Management, click Portfolios.

The *Portfolios* page appears.

2. Select the name of the portfolio to which you want to distribute costs.

The *Portfolio Scenarios* page appears.

3. Select the Properties tab.

The *Portfolio: Properties* page appears.

4. Click Child Portfolios from the Properties content menu.

The *Portfolio Properties: Child Portfolios* page appears.

5. Click Distribute Costs.

The *Portfolio Cost Distribution* page appears. Each portfolio displayed in the list is as a child of the parent portfolio.

6. For each child portfolio, enter a percentage of the total budgeted cost to be distributed to that portfolio in the portfolio's Budget % field.

The sum of all rows must equal 100%.

7. Click Submit.

The *Portfolio Properties: Child Portfolios* page appears. The parent portfolio's budgeted cost is distributed accordingly to each child portfolio, based on the calculated percentages.

By Example: Analysis at the Parent Portfolio Level

INR Financial's Retail Banking CIO would like to push down his budgeted costs to his line managers' project portfolios. Three IT departments—Technical Operation, Application Development, and Technical Support—report to the Retail Banking business unit CIO. The CIO's master portfolio contains the portfolios of each of his direct reports as child portfolios.

Portfolio Properties: Child Portfolios (Portfolio: CIO Master Portfolio)

Properties Contents Scenarios Scorecard Analyze

Portfolio: CIO Master Portfolio [Back to Portfolios]

General

Child Portfolio Filter

Filter: System Default

<input checked="" type="checkbox"/>	Portfolio Name	Parent Name	ID	Start	Finish
<input type="checkbox"/>	Application Development Portfolio	CIO Master Portfolio	ap925041	9/1/05	12/31/05
<input type="checkbox"/>	Technical Operation Portfolio	CIO Master Portfolio	to9278	8/1/05	12/31/05
<input type="checkbox"/>	Technical Support Portfolio	CIO Master Portfolio	ts0054	9/1/05	12/31/05

Total Results: 3

Add from List Remove Rollup Costs Distribute Costs Rollup Benefit

The CIO makes his distribution equally among the three IT departments.

Portfolio Cost Distribution (Portfolio: CIO Master Portfolio)

Portfolio Name	Portfolio ID	Budget %
Application Development Portfolio	ap925041	33.33
Technical Operation Portfolio	to9278	33.33
Technical Support Portfolio	ts0054	33.33

Submit Cancel

The line managers, after receiving the distribution, take their allocated budget and optimize their individual investments to that budget.

Before the distribution, the Application Development department had a total budgeted cost of \$400,000, and was over budget by \$204,000

Financials [--Actions--]

Filter: [--Select--] [Expand Filter]

Investment	ID	Planned Cost	Planned Benefit
Call Center Mgt. Application Upgrade	APP0001	13,500.00	27,000.00
Legacy Sales Datamart - Maintenance	APP2000	103,879.00	177,450.41
Sales Analytics - Maintenance Contract	APP3000	65,000.00	330,000.00
System Monitoring Application	APP8000	22,000.00	522,127.66
Swift Service Development	inr381450	185,473.74	350,000.00
Object Integration	obj00034534	214,167.95	375,000.00
Aggregation		604,020.69	1,781,578.07
Comparison		400,000.00	900,000.00
Variance		-204,020.69	-881,578.07

After the distribution, the Application Development department is now only over budget by \$104,000. The line manager must reallocate his budget based on this new budgeted amount.

Financials				[--Actions--]	
Filter [--Select--]				[Expand Filter]	
Investment	ID #		Planned Cost	Planned Benefit	
Call Center Mgt Application Upgrade	APP0001		13,500.00	27,000.00	
Legacy Sales Datamart - Maintenance	APP2000		103,879.00	177,450.41	
Sales Analytics - Maintenance Contract	APP3000		65,000.00	330,000.00	
System Monitoring Application	APP8000		22,000.00	522,127.66	
Swift Service Development	inr381450		185,473.74	350,000.00	
Object Integration	obj00034534		214,167.95	375,000.00	
Aggregation			604,020.69	1,781,578.07	
Comparison			499,950.00	900,000.00	
Variance			-104,070.69	-881,578.07	

By managing a set of child portfolios from a master portfolio, INR Financial's CIO can write reports analyzing the entire IT portfolio using metrics such as ROI.

Roll Up Budgeted Benefits from Child Portfolios

Rolling up the budgeted benefits from child portfolios changes the total budgeted benefit of the parent portfolio to match the sum of their budgeted benefits. You can view the portfolio's budgeted benefit and cost amounts on the *Properties: General* page.

To roll up the budgeted benefit

1. Click Portfolios from the Portfolio Management main menu.
The *Portfolios* page appears.
2. Select the name of the portfolio to which you want to distribute costs.
The *Portfolio Scenarios* page appears.
3. Click the Properties tab.
The *Portfolio: Properties* page appears.
4. Click Child Portfolios from the Properties content menu.
The *Portfolio Properties: Child Portfolios* page appears.
5. Click Rollup Benefit.

Distribute Budgeted Benefits to Child Portfolios

Use the *Portfolio Benefit Distribution* page distribute the budgeted benefit from the parent portfolio to a set of child portfolios. Use the Budget % field to enter a percentage of the budgeted benefit that will be distributed to each child portfolio.

To distribute the budgeted benefit

1. click Portfolios from the Portfolio Management main menu.
The *Portfolios* page appears.
2. Select the name of the portfolio to which you want to distribute benefits.
The *Portfolio Scenarios* page appears.
3. Click the Properties tab.
The *Portfolio: Properties* page appears.
4. Click Child Portfolios from the Properties content menu.
The *Portfolio Properties: Child Portfolios* page appears.
5. Click Distribute Benefit.
The *Portfolio Benefit Distribution* page appears. Each portfolio displayed in the list is a child of the parent portfolio.
6. For each child portfolio's Budget % field, enter a percentage of the total budgeted benefit to be distributed to that portfolio.
Note: The sum of all rows must equal 100 percent.
7. Click Submit.
The *Portfolio Properties: Child Portfolios* page appears. The parent portfolio's budgeted benefit is distributed accordingly to each child portfolio, based on the calculated percentages.

Remove Child Portfolio Associations

At any point during your portfolio analysis, you can disassociate, or remove, a child portfolio from the parent portfolio. This does not delete the child portfolio.

To remove a child portfolio

1. Click Portfolios from the Portfolio Management main menu.
The *Portfolios* page appears.
2. Select the name of the parent portfolio.
The *Portfolio Scenarios* page appears.
3. Click the Properties tab.
The *Portfolio: Properties* page appears.
4. Click Child Portfolios from the Properties content menu.
The *Portfolio Properties: Child Portfolios* page appears.
5. Select the box next to the portfolio you want to remove.
6. Click Remove.
The portfolio is no longer associated with the parent portfolio.

Chapter 7: Portfolio Scorecard

This section contains the following topics:

[Portfolio Analysis Using the Scorecard](#) (see page 103)

[Information on the Scorecard](#) (see page 104)

[Portfolio Balance](#) (see page 106)

[Portfolio Investments List](#) (see page 108)

[Portfolio Gantt Data](#) (see page 113)

[Portfolio Financials](#) (see page 114)

Portfolio Analysis Using the Scorecard

Once you have added your organization's investments and added content to your portfolio, you can examine your portfolio and evaluate its performance. The analysis occurs within the confines of the portfolio's start and finish date.

Use the *Portfolio Scorecard* page to view the list of investments included in your portfolio and to analyze the effects of a scenario applied to that portfolio. The scorecard supports the decisions you make about the investments that should be added to or removed from the portfolio. This page displays data regarding the portfolio in portlets that contain charts and graphs.

By default, this page contains the Investments, Balance, Gantt, and Financials portlets in minimized views. In maximized view, this page displays only the Investments portlet with a drop-down menu from where you can select the other portlets. Use the portlets on this page to publish performance and status information to your customers.

To view this page, open the portfolio. The *Portfolio Scenarios* page appears. Click the Scorecard tab.

Information on the Scorecard

In addition to viewing the list of investments included in your portfolio, you can use the *Portfolio Scorecard* page to perform other portfolio tasks.

The tasks you can perform on this page depend on the portlet you have in view. As you add and configure other portlets, the tasks you can perform will vary depending on the types of fields and data you choose to display.

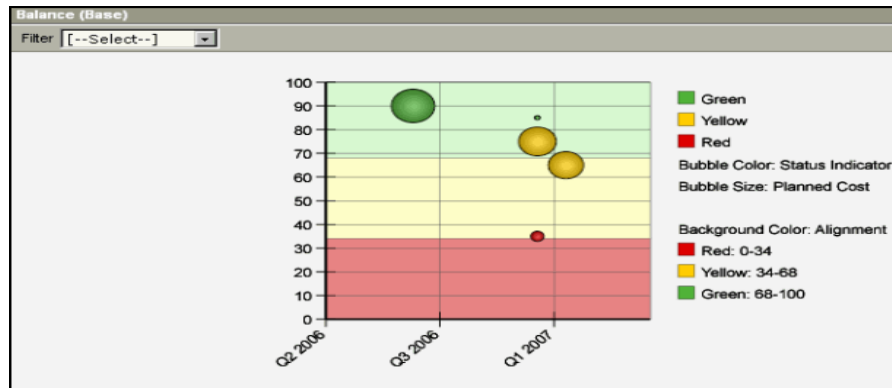
The following list describes the tasks you can perform from the portlets on this page:

- Perform portfolio analysis at the parent portfolio level. Once you have manually added the child portfolio's investments to this portfolio, you can use the scorecard to perform portfolio analysis
- Apply a scenario to the portfolio. If you have previously created a new scenario, it is automatically applied to the portfolio. You can see which scenario is being applied from the Scenario drop-down on the page toolbar. Use this toolbar option to apply another scenario or choose "None" to apply no scenarios.
- Add investments to a scenario. Clicking an investment's *Grid with Plus (Add to Scenario)* icon allows you to add the investment to a new scenario. You can then test different solutions to improve the portfolio's performance.
- Modify the investment in the scenario. When something has changed for the investment per a scenario, the *Grid with Checkmark (Edit in Scenario)* icon displays to the right of the investment name. Clicking this icon allows you to view the investment's actual details and to modify its planned cost and benefits, approval status, exclusion status, and priority for this scenario.
- View investment changes per an applied scenario. The red-lining shows the investment's actual values before the scenario was applied. This rollover effect occurs for planned cost and benefits, planned cost start date, approval status, exclusion status, and priority.
- Link directly to the investment's general properties. Clicking the name of the investment from the Investment column opens the investment and allows you to view and update its general properties.
- View the investment's planned cost. This cost is the cost covered by the portfolio. If an investment has a planned cost start date that starts part way through the year and is planned to end sometime the following year, the investment's costs may not be entirely covered in the portfolio.
- View the portfolio's total budget and cost values. The rows at the bottom of the portlet show the following values:
 - The Aggregation row shows the total investment costs that fall into the portfolio date range.

- The Comparison row shows the portfolio's planned cost when no scenario is applied. When a scenario is applied, this row shows the scenario's planned cost.
- The Variance row shows the variance from the planned costs. This variance is the difference between the aggregation and comparison rows. A negative variance indicates an overrun from the planned costs.
- View the investment's stage. The number of stages in the lifecycle is shown by the number of blocks that fit in the white bar. The current stage is indicated by the colored block. The block colors show the investment's status. Status settings are On Track (green), Marginal (yellow), or Critical (red).
- Filter the list of investments. Allows you to apply a filter to view investments meeting the criteria of the filter. This includes using saved power filters defined with an evaluated expression.
- Sort the list of investments. Allows you to click the investment list's column header to sort the list of investments. For example, clicking the Priority column header sorts the investments by priority.

Portfolio Balance

The portfolio's balance is illustrated in a bubble graph in the *Portfolio Scorecard* page's Balance portlet. This graph shows how the portfolio's investments are balanced between corporate alignment and the onset of benefits. From this portlet you can view the investment details and modify the investment properties.



To view this portlet

1. Open the portfolio, and click the Scorecard tab.
2. Do one of the following:
 - If the page is maximized to display only one portlet at a time, choose Balance from the portlet drop-down.
 - If this page is minimized to display all portlets, this portlet lies below the Investments portlet. Use the scroll bar, if necessary, to view this portlet.

By default, each bubble on the graph represents the portfolio's approved investments. You can also choose to view unapproved or all portfolio investments by choosing a status from the Status drop-down on the portfolio's page toolbar.

The portfolio's investments are scored on three factors: business alignment, cost, and risk. For example, if the portfolio's budget is defined for this year only, the costs are restricted to those for this year. Changing the investment's planned cost changes its bubble size.

The values for business alignment are shown on the y-axis and are shown with a background zone color on the graph. The values for the finish dates are shown on the x-axis. The bubbles are sized according to the investment's planned cost, and the bubble color represents the investment's risk status.

The graph's legend indicates the color translations. High-risk investments have a red bubble color, and low-risk investments have a green bubble color. Investments lie on the graph somewhere between good (68-100) and poor (0-34) according to their alignment with business goals. An investment with a low y-coordinate (distance from the origin) lies somewhere within the red zone on the graph, and move up the graph vertically based on their business alignment score.

Rolling your cursor over a bubble in the graph displays the details of the investment below the graph, such as the investment's name, its start date, alignment score, and planned cost. You can configure this mouseover label by configuring the graph.

You will see rollover text only if you have the SVG option selected for Graph Format on the *System Options* page.

Clicking a bubble opens the investment's general properties. This allows you to update the investment's general details—budget, risk, and alignment—from the portfolio. If you click an investment while a scenario is selected, then the properties page is not editable.

Portfolio Investments List

The Investments portlet on the *Portfolio Scorecard* page displays all included investments having the status as selected from the toolbar. The investments consist of those to which you have access rights, and that match the view and filter settings you selected from the toolbar. For example, if you chose to view unapproved investments, the list displays only the investments with a status other than "Approved" in the portfolio and that you have access to.

Use this portlet to do the following:

- View the list of portfolio investments.
- Link to the investment's properties page by clicking the investment's name.
- Add an investment to a scenario by clicking the *Grid with Plus (Add to Scenario)* icon that displays next to the investment.
- View the investment's ID, priority, goal, alignment, risk, stage, planned cost, and start date, that is included in the portfolio.
- View remaining cost and remaining role allocation for an investment by comparing the values in the following cost and role columns:
 - Actual Cost and Remaining Cost
 - Role Demand, Remaining Role Allocation, and Role Actuals

Visibility into remaining cost and remaining role allocation is important when planning a portfolio. It helps you determine how much of the budget remains and how much additional capacity is required. Planning a portfolio becomes easier when you can compare your portfolio's budget and role capacity with the correct budget values and the correct role demand.

To view this portlet

1. Open the portfolio and select the Scorecard tab.

If this page is minimized to display all portlets, this portlet is the first section on the page.
2. If the page is maximized to display only one portlet at a time, choose Investments from the portlet drop-down.

The portfolio's values are displayed in the rows at the bottom of the portlet:

- The Aggregation row shows the total for the investments contained in the portfolio
- The Comparison row shows the portfolio's data
- The Variance row shows the difference between the aggregation and the comparison values. A negative variance value indicates the portfolio is over budget. What you select on the *Portfolio Properties: General* page affects the values in the comparison as follows:

- If you select Total Planned Cost and Total Capacity, then the Planned Cost is compared with portfolio cost.
- If you select Remaining Cost and Remaining Capacity, then the Remaining Cost is compared with portfolio cost.

Role Filtering and Investments Data

The following explains how data in the Role Demand, Remaining Role Allocation, and Role Actuals columns vary on the Investments portlet based on what you select from the Portfolio Roles filter:

When you filter on a particular role, then all columns show the numbers related to that role:

- Role Demand shows the aggregated total allocation value of all the resources and roles whose investment role matches the filtered role for each investment.
- Remaining Role Allocation shows the aggregated total remaining allocation value of all the resources and roles whose investment role matches the filtered role for each investment calculated by subtracting Role Actuals from Role Demand.
- Role Actuals show the aggregated total actuals of all the resources and roles whose investment role matches the filtered role for each investment.

When *No Role Assigned* is selected in the filter:

- Role Demand shows aggregated total allocation value of all the resources and roles irrespective of their investment role for each investment.
- Remaining Role Allocation shows the aggregated total remaining allocation value of all the resources and roles irrespective of their investment role for each investment.
- Role Actuals shows the aggregated total actuals of all the resources and roles irrespective of their investment role for each investment.
- The Comparison and Variance aggregation rows under all these three columns are left blank.

No Role Assigned is a special entry that represents demand for resources that do not have a role assigned to them. This matches the behavior of the *Role Capacity* page found on the investment. The values for this entry are included in the aggregated total even when "no role" option is selected. You can always choose *No Role Assigned* when filtering on a specific role.

Planned Cost Calculations

The following describes what the planned cost values indicate for department and generic portfolios:

- For a generic portfolio, the planned cost value represents the total cost for that investment.
- For a provider department portfolio, the planned cost value represents the total cost for that investment.
- For a customer department portfolio, the planned cost value represents the actual funding amount for that investment. This is the full budget amount multiplied by the applicable allocation percentage (that this department bears) expressed in the chargeback rule for that investment. Only the allocation rate in effect on the first date of the portfolio's planning horizon is applied. Any time-based variation in chargeback allocation during the portfolio's planning horizon is ignored.

Example

INR Financial created and approved the Fast Track Xchange project. The internal customers, Global Securities and Cash Management divisions have agreed to pay for all costs associated with this project. The following chargeback rules were set up for the project from 1/ 1/ 07 to 12/31/ 08 as follows:

- Year 2007: Global Securities=50% and Cash Management= 50%
- Year 2008: Global Securities= 60% and Cash Management= 40%

The budget properties for the year 2007 for the project is set up as follows:

- Planned Cost: \$300,000
- Planned Cost Start Date: 1/1/2007
- Planned Cost End Date: 12/31/2007

The budget properties for the year 2008 for the project is set up as follows:

- Planned Cost: \$400,000
- Planned Cost Start Date: 1/1/2008
- Planned Cost End Date: 12/31/2008

The portfolio manager creates the following customer department portfolios:

- "Cash Management 2007" for the period 1/1/2007 to 12/31/2007
- "Cash Management 2008" for the period 1/1/2008 to 12/31/2008

Both portfolios belong to the INR Financial/Cash Management department and include the "Fast Track Xchange" investment. The portfolio manager navigates to the Scorecard tab. The planned cost value for the same investment appears as follows in the two portfolios:

- The Cash Management 2007 portfolio displays the planned cost value for the investment "Fast Track Xchange" as \$150,000 (50% of 300,000)
- The Cash Management 2008 portfolio displays the planned cost value for the investment "Fast Track Xchange" as \$160,000 (40% of 400,000)

Investments with Hierarchy

If a chargeback rule is set up for an investment to charge a particular department, then that investment is included in that department's customer portfolio.

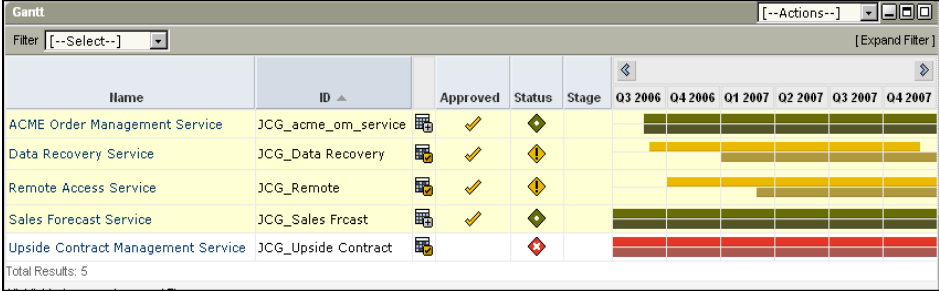
If an investment has a parent and if both the parent and the child investments have been set to charge a department, charges get aggregated to the top-level based on the investment allocation. This is true if the parent investment is included in the portfolio. If only the child investment is included in the portfolio, only the cost associated with it is displayed.

Consider the following example: The budget for investments P1, P2, and A1 is \$100,000 each for the year 2007. As P1 and A1 are charged to department D1, both these investments are available in the customer department portfolio for D1. A1 is a child of P1 and P2 and is allocated at 50% to each parent.

- Scenario 1. If you include only investment P1 in a portfolio, the portfolio scorecard will display the investment P1 with a planned cost value of \$150,000 (\$100,000 for P1 + (50% of \$100,000 for A1))
- Scenario 2. If you include P1 and A1 in the portfolio, the portfolio scorecard will display the investment P1 with a planned cost value of \$100,000 and investment A1 with a planned cost value of \$100,000.
- Scenario 3. If you include only A1 in the portfolio, the portfolio scorecard will display the investment A1 with a planned cost value of \$100,000.

Portfolio Gantt Data

The Gantt portlet shows investment data—the investment’s stage, status, duration, and completion date, and whether the investment has started (money has been spent)—in a list view.



Name	ID	Approved	Status	Stage	Q3 2006	Q4 2006	Q1 2007	Q2 2007	Q3 2007	Q4 2007
ACME Order Management Service	JCG_acme_om_service									
Data Recovery Service	JCG_Data Recovery									
Remote Access Service	JCG_Remote									
Sales Forecast Service	JCG_Sales Frcast									
Upside Contract Management Service	JCG_Upside Contract									

Total Results: 5

Use this portlet to view the list of portfolio investments, to link to the investment’s properties page by clicking the investment’s name, or to create a new portfolio scenario that includes the investment by clicking the *Grid with Plus (Add to Scenario)* icon that displays next to the investment. From this portlet, you can view the investment’s ID, progress, stage, status, and Gantt bar.

To view this portlet

1. Open the portfolio and click the Scorecard tab.

If this page is minimized to display all portlets, this portlet follows the Balance portlet. Use the scroll bar, if necessary, to view this portlet.

2. If the page is maximized to display only one portlet at a time, choose Gantt from the portlet drop-down.

The Gantt bars are color-coded to show which step in their process the investments are in. The investment can have a status indicator set to "Green" (on track), "Yellow" (marginal), or "Red" (critical). To view the investment’s name, planned cost start date, planned cost finish date, and status indicator value, roll the cursor over the investment’s Gantt bar.

Portfolio Financials

The Financial portlet shows the financial properties of the investments contained in this portfolio. Use this portlet to view the list of portfolio investments, to link to the investment's properties page by clicking the investment's name, or to create a new portfolio scenario that includes the investment by clicking the *Grid with Plus* icon. From this portlet, you can view the investment's name, ID, planned cost, planned benefit, planned ROI, net present value (NPV), and planned breakeven date.

You can also see actual cost and remaining cost for an investment. This is important when planning a portfolio as it helps you decide how much more money you need to spend on a particular investment.

To view this portlet

1. Open the portfolio and click the Scorecard tab.

If this page is minimized to display all portlets, this portlet follows the Gantt portlet. Use the scroll bar, if necessary, to view this portlet.

2. If the page is maximized to display only one portlet at a time, choose Financials from the portlet drop-down.

Chapter 8: Graphical Portfolio Views

This section contains the following topics:

[About Graphical Analysis](#) (see page 116)

[Life-Cycle Funnel](#) (see page 117)

[Planned ROI/Alignment Zones Portlet](#) (see page 118)

[Benefits by Goal Portlet](#) (see page 119)

[Planned Costs Portlet](#) (see page 120)

[Planned Cost/Benefit Portlet](#) (see page 121)

[Risk/Reward Quadrants Portlet](#) (see page 122)

About Graphical Analysis

The *Portfolio Analyze* page presents a graphical analysis of the investments included in your portfolio. Like the portfolio's scorecard, you can use this page to examine your portfolio and to evaluate its performance.

By default, this page contains the following portlets:

- Life-cycle Funnel
- Portfolio Planned ROI/Alignment Zones
- Benefit by Goal
- Planned Costs
- Planned Cost/Benefit
- Risk/Reward Quadrants.

You can configure this page to show additional portlets or you can modify what data is displayed for analysis in the portlets.

What you select on the toolbar of the *Portfolio: Scorecard* page determines what you initially view on the *Portfolio: Analyze* page. For example, if you were comparing a scenario with the plan of record on the *Portfolio: Scorecard* page, then when you select the Analyze tab, two sets of each portlet (Base and Comparison) display, one displaying the scenario data and the other displaying the plan of record data. The "Base" portlet data always corresponds to the selection on the Scenario drop-down and the "Comparison" portlet data always corresponds to the selection on the Compare To drop-down.

In a maximized view, only the Base portlets are visible and the *Compare To* drop-down option does not appear on the toolbar. Click the Restore icon to display the Comparison portlets and the Compare To drop-down.

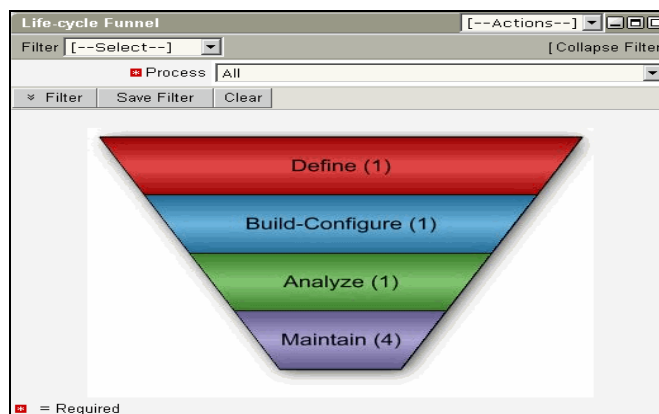
To view this page

Open the portfolio and click the Analyze tab.

You can also access this page from any portfolio page by selecting the Analyze tab.

Life-Cycle Funnel

The Life-cycle Funnel portlet displays the number of portfolio investments in a given process stage. As investments move from one process stage to another—either manually or via an applied process—this funnel reports their progress by displaying the data for the process.



Each section of the funnel corresponds to a stage in the applied process. Each section is labeled with the name of the stage as well as the number of investments in that stage. If a portfolio investment has not been identified with a stage, it is included in the funnel in an unlabeled section with the number of investments without stage identifiers.

By default, this funnel shows investments in all process stages. Investments marked for deletion are not included in this portlet.

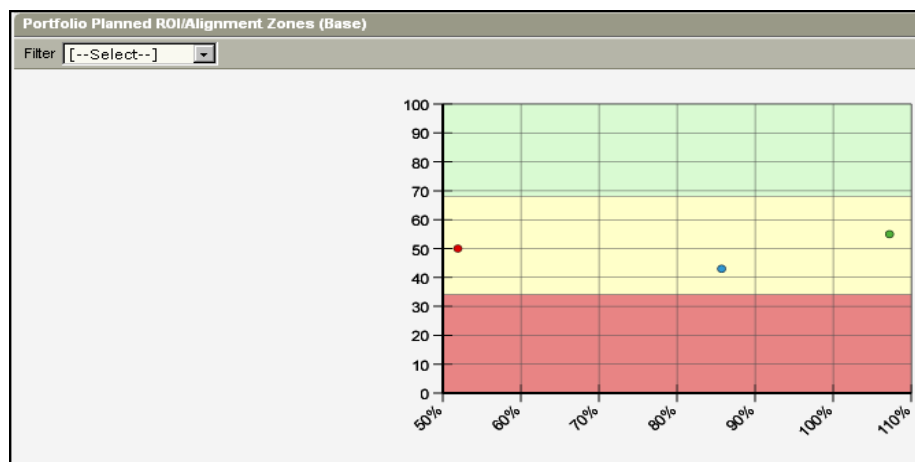
To view the funnel for another process

Choose a process from the Process drop-down on the page toolbar. Roll your cursor over a section of the funnel displays the Stage identifier. You can configure this mouseover label by configuring the graph.

Note: See the *Project Management User Guide* for more information.

Planned ROI/Alignment Zones Portlet

The Planned ROI/Alignment Zones portlet displays a scatter graph showing alignment with corporate goals (y-axis) and budgeted ROI (x-axis) for each of the portfolio's investments. Each point on the graph represents a portfolio investment.



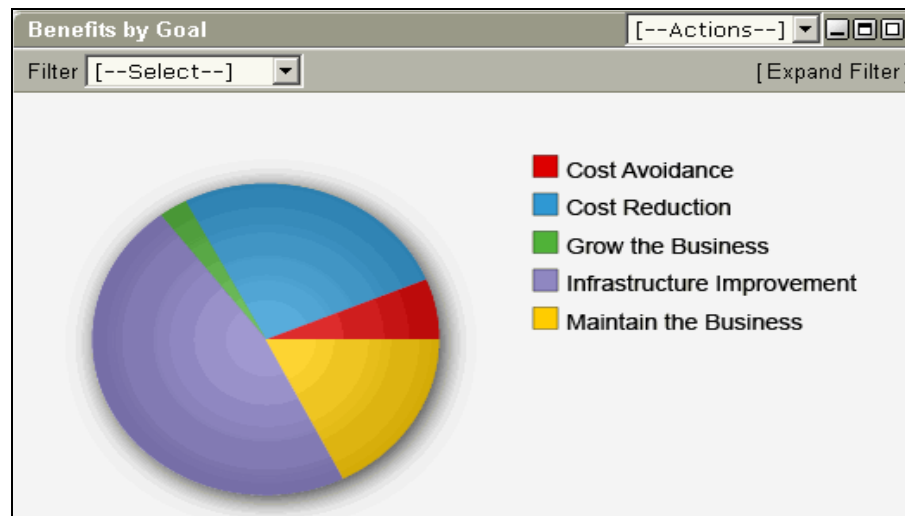
The graph's zones are illustrated using a background color. The color denotes the different tolerance zones. The zones are based on stoplight values: green ($\geq 20\%$), yellow ($< 20\%$), and red ($< 5\%$). Investments positioned in the green tolerance zone are highly aligned, have a good ROI, or a combination of both. Those in the yellow tolerance zone have an average alignment and ROI, and investments in the red tolerance zone are poorly aligned and have poor ROI.

Roll your cursor over a point in the graph to display the investment's details—name, budgeted ROI, and alignment—below the graph. You can configure this mouseover label by configuring the graph.

Investments marked for deletion are not included in this portlet.

Benefits by Goal Portlet

The Benefits by Goal portlet displays a pie graph showing the proportion of the portfolio's investment budgeted benefit per corporate goal. Each pie segment represents a corporate goal to which at least one investment in the portfolio is mapped, and the size of the segment represents the benefit. The legend represents the investment's corporate goals.



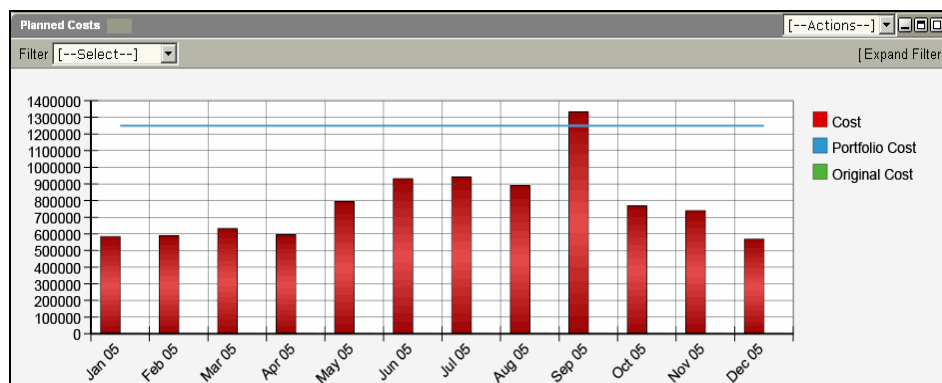
Rolling your cursor over a pie segment displays the name of the corporate goal and the relative cost of investments mapped to that corporate goal. You can configure this mouseover label by configuring the graph.

The detailed investments are not displayed in this graph.

Investments marked for deletion are not included in this portlet.

Planned Costs Portlet

The Planned Costs portlet displays a column graph showing costs across time covered by the portfolio start and end dates. The height of each column represents the aggregate budgeted costs for all of the portfolio's investments during that month.



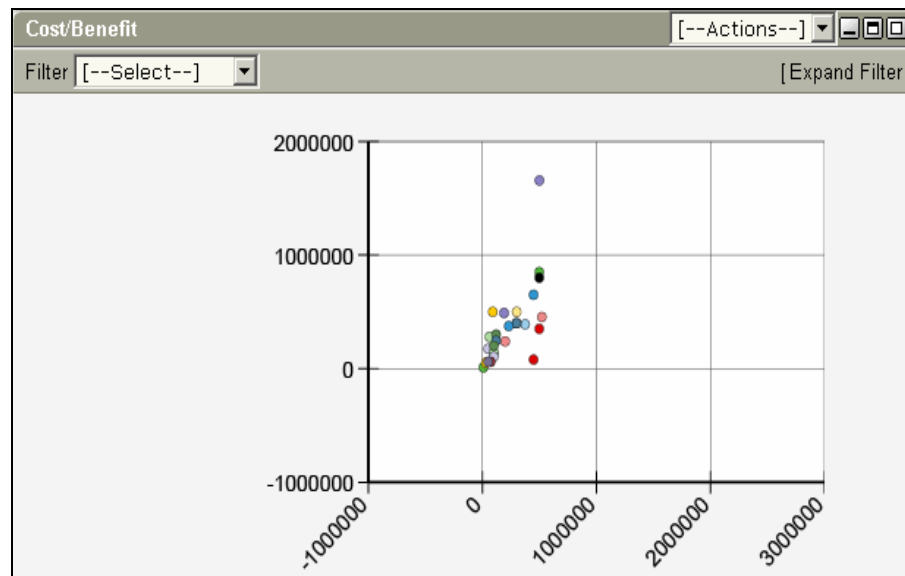
The blue line represents the portfolio's budgeted costs over the same time period. You can use this visual to compare the investment's budgeted costs to the portfolio's budgeted costs. In the legend, Original Cost represents the actual cost of the investment and Cost represents the cost of the investment in the scenario.

Rolling your cursor over a column displays the aggregate budgeted cost of investments for that month. You can configure this mouseover label by configuring the graph.

Investments marked for deletion are not included in this portlet.

Planned Cost/Benefit Portlet

The Planned Cost/Benefit portlet displays a scatter graph that displays the portfolio's investments as points on the graph. Their placement of each point on the graph is the intersection of their budgeted benefit (y-axis) and budgeted cost (x-axis). Investments that lie higher on the y-axis have a higher benefit, while investments that lie to the right on the x-axis have a higher budgeted cost.



Clicking a point on the graph opens the investment's general properties. This allows you to update the investment's details—budget, risk, and alignment—from the portfolio. The Planned Costs portlet displays different cost for the investment as compared to that on the properties page of the investment as the cost shown on the portlet is curbed by the portfolio start and end dates. If the portfolio covers the full period for the investment, then the cost shown on the portlet as well as the properties page match.

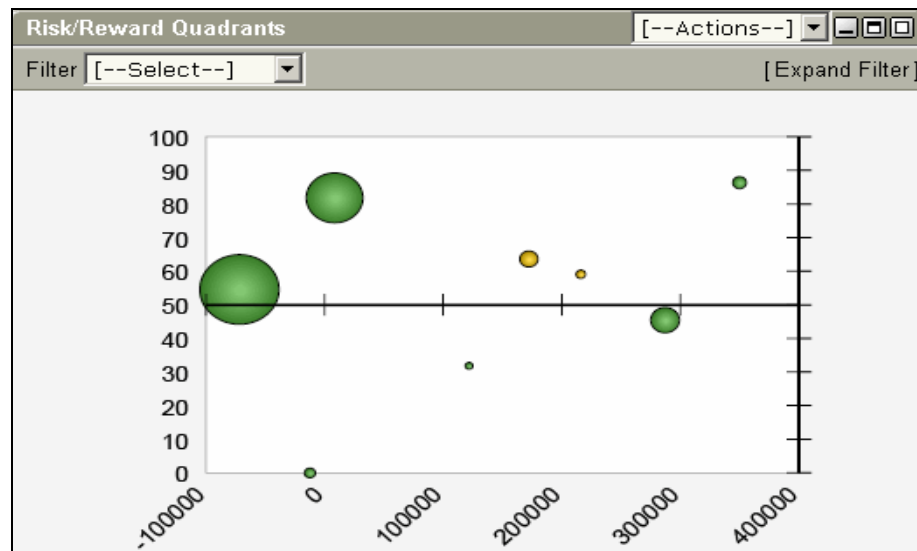
You cannot edit the properties page if you click an investment while a scenario is selected.

Roll your cursor over a point to display the investment's details—investment name, budgeted cost, and budgeted benefit—below the graph. You can configure this mouseover label by configuring the graph.

Risk/Reward Quadrants Portlet

The Risk/Reward Quadrants portlet displays a bubble graph with a bubble for each of the portfolio's investments. The placement of each bubble on the graph is the intersection of their risk of investment in the portfolio (y-axis) and portfolio planned NPV (x-axis). Investments that lie higher on the y-axis are riskiest, while investments that lie farther to the right on the x-axis have the highest planned NPV. The bubble size or radius represents the planned cost of the investment in the portfolio, and the bubble color represents the investment's category.

The x-axis intersects with the y-axis at \$1,000,000 (portfolio planned NPV). The y-axis intersects with the x-axis at 50% (risk).



Clicking a bubble on the graph opens the investment's general properties. This allows you to update the investment's details—budget, risk, and alignment—from the portfolio.

If you click an investment while a scenario is selected, then the properties page is not editable.

Rolling your cursor over a bubble displays the investment's details—name, planned NPV, risk, and planned cost—below the graph. You can configure this mouseover label by configuring the graph.

Those investments marked for deletion are not included in this portlet.

Chapter 9: Scenarios

You can use different types of scenarios to plan the allocation of your resources across investments, decide on the correct set of investments for your portfolio, or make adjustments to your portfolio budget.

This section contains the following topics:

[About Scenarios](#) (see page 123)

[About Portfolio Scenarios](#) (see page 124)

[Capacity Planning Scenarios](#) (see page 158)

About Scenarios

A scenario is a collection of hypothetical changes to an investment, such as a project, or to a portfolio. Hypothetical changes allow you to pose what-if questions about the investments you are managing and see the effects on resources, budget, and work breakdowns.

You can apply a scenario on top of targeted data and use it to evaluate proposed changes. For example, to determine how an investment (or a collection of investments) can be optimally managed, you can apply a scenario to learn how the application of additional resources, the addition of more time, or the delay of less critical investments can optimize the management of your investments and the performance of your resources.

Scenario Types

You can build the following types of scenarios:

- Portfolio scenarios. Use portfolio scenarios to model different sets of portfolio investments based on corporate planning decisions and evaluate trade-offs before selecting a specific course.
- Capacity planning scenarios. Use capacity planning scenarios to view and compare the capacity of resources against the demand for their services on all investments that are staffed.

About Portfolio Scenarios

Portfolio scenarios provide a systematic methodology for you to optimize your portfolios. They provide you the flexibility of making what-if evaluations to portfolio investments. Use CA Clarity PPM's scenario feature to investigate changes you can make to the investments contained within your portfolio. For example, an executive team that builds a portfolio to represent all the work in the company or an individual department must decide on a set of investments to fund that the organization has capacity to execute.

With portfolio scenarios, you can build portfolios quickly by finding the best mix of investments using a systematic procedure. Use scenarios to remove or delay an investment, alter the investment's approval status, or modify the investment's planned benefits or costs.

Portfolio Scenario Behavior

The following lists how a portfolio scenario behaves:

- A portfolio can have one or more portfolio scenarios.
- A portfolio scenario includes capacity planning scenario attributes.
- A portfolio scenario is available from all capacity scenario-enabled pages even if the investment is not in the portfolio.
 - When you leave the portfolio and edit the scenario from outside the portfolio, you are limited in the actions you can take from within the edit pages. You can no longer edit the portfolio attributes of the scenario; only the subset of attributes that it shares with capacity planning.
- A portfolio scenario can include financial information for an investment, such as financial plans and a simple budget.
- An investment can contribute to a scenario even when it is not explicitly in the portfolio.

Portfolio Scenarios Overview

With portfolio scenarios, you can model different sets of portfolio investments based on corporate planning decisions and evaluate trade-offs before selecting a specific course. They provide you the flexibility of making what-if evaluations to portfolio investments and allow you to investigate changes you can make to the investments contained within your portfolio.

With portfolio scenarios, you can build portfolios quickly by finding the best mix of investments using a systematic procedure. Use portfolio scenarios to remove or delay an investment, alter the investment's approval status, or modify the investment's planned benefits or costs.

View the List of Portfolio Scenarios

Use the *Portfolio: Scenarios* page to view a list of scenarios that have been created for your portfolio. A portfolio scenario includes hypothetical suggestions you should make to your portfolio before implementing them. From this page, you can build new portfolio scenarios, delete a scenario, copy a scenario, view which scenario is current, and communicate scenarios. You can also link to the *Scenario: Investments* page to make changes to the investments included and excluded in the scenario.

To view the list of portfolio scenarios

Open the portfolio. The *Portfolio: Scenarios* page appears by default.

You can also access this page from any portfolio page by selecting the Scenarios tab.

The list includes the scenarios to which you have the *Scenario - Navigate* access right. The following conditions are true of scenarios displayed in this list:

- They provide a quick overview of the scenario planned cost, planned benefit, associated portfolio, and scenario owner.
- They are attached to the current portfolio as well as to scenarios attached to parent portfolios.
- They show at the portfolio-level, how the scenarios differ from the real portfolio data.

Build Portfolio Scenarios

As a portfolio manager, you can build an unlimited number of scenarios for each of your portfolios. Once a portfolio scenario is built, it can be applied to the current portfolio's scorecard. At any time, you can choose whether or not to apply a scenario to the portfolio.

Use the *Create Scenario* page to define the properties of your new scenario. You can complete just the required fields and then return to the *Scenario: Properties* page to complete the remaining fields when you have that information available.

Once you have created your scenario, you can begin to define the rules for which investments must be included or excluded from the portfolio scenario, and add and alter scenario investments.

To create a new scenario

1. From within a portfolio, click the Scenario tab.
2. Click New.

The *Create Scenario* page appears.

3. Complete the following fields:

Scenario Name

The name for this portfolio scenario.

Portfolio

The portfolio to which this scenario is associated. This field is pre-populated.

Description

The description for this scenario.

Owner

The name of the person responsible for managing this scenario. Click the Browse icon to select and add the scenario owner.

Planned Cost

The amount used during scenario generation that determines the total cost of the scenario investments. This value will be reflected on the *Portfolio Scorecard* page.

Planned Benefit

If left blank, when scenario generation is complete, this amount is set to the total benefit of all scenario investments. This value will be reflected on the *Portfolio Scorecard* page.

Manage Costs Using

The option selected at the portfolio level (Total Cost or Remaining Cost) is pre-populated. You cannot edit this field.

Capacity Unit Type

The option selected at the portfolio level (Hours or FTE) is pre-populated. You cannot edit this field.

Manage Capacity Using

The option selected at the portfolio level (Total Capacity or Remaining Capacity) is pre-populated. You cannot edit this field.

- Total Capacity—Capacity values represent the total capacity between the start and finish dates of the portfolio.
- Remaining Capacity—Capacity values represent the capacity from today through the portfolio finish date.

4. Click Save.

A new scenario is created and the *Scenario: Properties* page appears.

Edit and Navigate Scenarios

The *Portfolio Scenarios* page displays a list of all of the scenarios to which you have view, edit, or delete access rights. You can use this page to open an individual scenario, create a new scenario, copy a scenario, delete a scenario, communicate scenario investment changes, access another portfolio, link directly to the *Scenario: Investments* page, or to link to the *Scenario: Properties* page and the scenario's content menu page.

To view this page, open the portfolio, and then select the Scenarios tab. To open the scenario, click the name of the scenario from the list.

Edit Portfolio Scenarios

As the portfolio owner or manager, you can open the scenario to edit the scenario's properties, set or modify the scenario's constraint parameters, generate the efficient frontier, add and alter scenario investments, copy scenarios, and delete scenarios.

If you want to link directly to the list of scenario investments, click the Scenario Investments icon that appears next to the scenario you want to view on the *Portfolio: Scenarios* page.

To open and edit a scenario

1. Open the portfolio.
The *Portfolio Scorecard* page appears.
2. Click the Scenarios tab.
The *Portfolio: Scenarios* page appears.
3. Click the name of the scenario you want to open.
The *Scenario: Properties* page appears.

Navigate Scenarios

With the portfolio scenario open, the scenario's content menu enables you to navigate a scenario. The Properties link links you to the *Scenario: Properties* page. To access this page from the portfolio, on the *Portfolio Scenarios* page select the name of the scenario.

From the scenario's content menu and pages, you can do the following:

- Set scenario constraints
- Optimize the portfolio scenario
- Build an efficient frontier
- Generate a portfolio scenario
- Define and modify the scenario's investments
- Restrict or provide access to the scenario

Add Optimization Attributes

Use the *Scenario: Optimizations* page to add the attribute selection criteria and then define the ranking method. To optimize your scenario, add attribute fields and define how you want them to rank and be weighed. You can add and define as many optimization parameters as you need.

To access this page, open the portfolio scenario. Select the Optimizations link from the scenario's content menu.

Manage Portfolio Scenario Roles

You add roles to a portfolio scenario to adjust (what-if) the capacity for those roles. For example, say your company has five product managers. In this case, you can create one scenario where you add the role of product manager and set the capacity to be "10" FTE. This means that you plan to hire five additional product managers. You can create yet another scenario where you set the role capacity to "3" FTE. This means that you have two extra product managers and might need to lay them off.

So, roles in a scenario allow you to see how your demand can be filled if you increase or decrease the capacity associated with those roles. In addition, when you generate a scenario, the values you enter for role capacity are used to generate the best fit set of investments given the demand and capacity for that role.

You can only add from the roles already added to the portfolio from the Contents tab. Role capacities in a scenario default to the values entered in the portfolio contents and to the units (FTE or Hours) which you picked for the portfolio.

Add Roles to Portfolio Scenarios

When you select and add roles to the scenario, the role capacities which you entered on the *Portfolio Contents* page are pre-populated on the scenario. You can override the default values by entering new values and saving them. The values are in hours or FTEs depending on what you picked for the portfolio.

If you did not add roles to the contents of your portfolio, no roles are available to be added to the portfolio scenario. Likewise, if you remove a role from the portfolio, that role is removed from the portfolio scenario.

To add a role to a scenario

1. From the *Portfolios* page, click the name of the portfolio you want to view.
The *Portfolio Scenarios* page appears.
2. Open the scenario for which you want to add roles.
The *Scenario: Properties* page appears.
3. From the content menu, select Roles.
The *Scenario: Roles* page appears.
4. Click Add.
The *Select Roles* window opens.
5. Filter for and select the roles you want to add. Click Add.
The *Scenario: Roles* page appears listing the newly added roles and their default capacities.

6. To overwrite the default role capacities, enter new capacity values for your roles.
7. Click Save.

Remove Roles from Portfolio Scenarios

To remove a role from a scenario

1. Open the portfolio scenario.
2. From the content menu, select Roles.
3. On the Scenario: Roles page, select the role that you want to remove and click Remove.

Reset Role Capacity

After changing the role capacities in a scenario, you can change them back (that is, reset them) to the last saved values in the system. Select the roles for which you want to reset role capacity and click Reset.

Refresh Role Capacity

You can refresh (re-populate) the role capacity values to match the capacity values on the *Portfolio Contents page* by selecting the individual roles and clicking Refresh Capacity. Only the selected roles are refreshed with the capacity data from the portfolio.

Set Scenario Constraints

Once you have created your portfolio scenario, define the rules for which investments must be included or excluded from the scenario. In CA Clarity PPM, this is known as pinning investments. Each element within a scenario defines a change from the plan of record.

At any point while you are optimizing your portfolio using the scenario-based planning process, you can choose to generate your portfolio scenario. When you do this, the scenario is generated based on the criteria you enter on the *Scenario: Constraints* page and the *Scenario: Optimizations* page. You can later return to these scenario content pages to modify the optimization and constraint parameters.

Use the *Scenario: Constraints* page to define the constraint parameters for your scenario. From this page, you can specify that you would like to honor project dependencies in your scenario. You can also make sure all approved, started, and required projects are approved and included in the scenario. In the Specific Investment Rules section of the page, you can pick specific investments that must be approved and included in the scenario, as well as pick specific investments that must be excluded from the scenario. Use this page to define as many constraints as you need.

To access this page, open the portfolio scenario. Select the Constraints link from the scenario's content menu.

Pin Investments

When you generate a scenario, you can force selected investments to always be included in a scenario even when a pinned investment does not match the constraints and optimization parameters you set. The scenario investments list is only generated if all of the pinned investments can be completed within the portfolio's budgeted cost and role capacity. Use the Quick Investment Settings section of the *Scenario: Constraints* to pin scenario investments that meet a certain criteria.

The following list describes the fields that are available for you to pin investments:

Pin Required Investments

Includes all scenario investments that are marked as "Required".

Pin Approved Investments

Includes all scenario investments whose status is set to "Approved".

Pin Started Investments

Includes all scenario investments whose progress is set to "Started".

Respect Investment Dependencies

Includes all scenario investments that are dependent on each other.

Use Portfolio's Date Range

Confines scenario investment budget values to within the portfolio's start and finish dates.

Include and Exclude Scenario Investments

Portfolio optimization allows you to look at your list of potential portfolio investments for the current funding cycle and role capacity, and to make decisions about which investments to fund to drive the most value to your organization. The goal is to find the best mix of investments that create the greatest possible risk-adjusted value without exceeding the applicable constraint on available resources. Use scenario optimization to help you make these decisions without having to guess which investments to include in your portfolio scenario.

You can have a scenario generation algorithm applied that will create subsets of investments and display them graphically to allow you to efficiently find the optimal portfolio. Algorithms are flexible; they allow you to specify the optimal mix of scenario traits for your company. By computing a number of scenarios over a given investment range, you can build an efficient frontier that compares the budgeted costs and role allocation of optimal scenarios at different levels of investment to see if spending more or less is better.

Rank Investments

The *Scenario: Optimizations* page can also be used to build a weighted selection criteria for all investments included in the scenario and to apply scoring that is strategic to your company. You can define the optimization parameters for a scenario by ranking investments based on specific attributes and weighing them based on importance. When you generate the scenario, the attributes, ranking methods, and weightings you establish are used to add investments to the scenario until the portfolio's budgeted cost has been reached.

Rank Optimization Parameters

The optimization parameters you enter on the *Scenario: Optimizations* page are used by during scenario generation to determine which attributes are most and least important when selecting scenario investments.

In the following illustration, four attributes have been added to the scenario, with different rankings and weightings.

Unlike scenario constraints, scenario optimizations are not absolute. Attributes with higher weights receive more consideration than those with lower weights. Use this page to add optimization parameters and then choose which ranking method is to be used for that attribute.

Rank Scalar and Unbounded Attributes

A scalar attribute is an attribute whose value is a number within a certain range, such as the "Alignment" attribute, which has a range between zero and 100. An unbounded attribute is similar to the scalar attribute, except its value has no boundaries, such as the "Budgeted Benefit" attribute.

To rank scalar and unbounded attributes, from the *Scenario: Optimizations* page, on the attribute's row, choose whether a higher value is better (like ROI) or a lower value is better (like risk) from the Ranking Method drop-down.

Rank Enumerated Attributes

An enumerated attribute is an attribute whose value is a pre-defined set of values, such as the "Goal" attribute, which you can set to cost reduction, infrastructure, improvement, cost avoidance, grow the business, or maintain the business. For enumerated attributes, you can set the balance for each item in the enumeration by entering weightings on the *Lookup Value Weighting* page.

To rank enumerated attributes, from the *Scenario: Optimizations* page, on the attribute's row, click the Lookup value weighting link.

Weight Optimization Parameters

On the *Scenario: Optimizations* page, you can specify the importance of each optimization attribute you add by setting a score for each attribute. There is no restriction on the weight settings for optimization parameters. Once you save your entries, they are normalized to a percentage value. Scenario generation uses a fitness algorithm to compute the score for each candidate scenario based on the optimization parameters and weightings you enter.

To weigh an optimization parameter, on the *Scenario: Optimizations* page, on the attribute's row, enter a score in the Attribute Weighting field.

Use the Efficient Frontier

The efficient frontier is the set of all actual portfolios that are optimal for a given set of investments such that no other scenario exists with less cost and more benefit or value. It provides you with a starting point by which you can evaluate and make decisions about your portfolio investments.

You can allow CA Clarity PPM to calculate and suggest a set of optimal portfolio scenarios based on a combination of parameters you set on the *Scenario: Constraints* and *Scenario: Optimizations* pages. The calculation is based on a scenario generation algorithm that determines how the costs and benefits of individual investments combine to determine the costs and benefits of the portfolio as a whole. Algorithms are adaptive; they can solve practical problems. They are especially suited to scenario optimization because they can efficiently narrow down a large set of solutions quickly.

The efficient frontier requires that you first generate the graph. Without this, the candidate scenarios are not built. It uses the same algorithm as when a single scenario is generated, but the budgeted cost amount is incremented over an investment range to produce a set of candidate scenarios. Using the efficient frontier, you can see budgeted benefit trends and determine if setting a higher or lower investment amount would increase your portfolio's ROI.

View the Efficient Frontier Graphically

Use the *Scenario: Efficient Frontier* page to view a graphical view of the set of optimal portfolio scenarios recommended based on two optimization parameters; by default, these are budgeted cost and budgeted benefit. Before using this page, set the scenario's constraint and optimization parameters and generate the scenario.

You can also use this page to display a list of these scenarios. From this table, you can view details about the each set of actual portfolios including the portfolio's cost, benefit, ROI, score, count, as well as the slope and distance from the from the optimal portfolio.

To access this page, open the portfolio scenario. Select the Efficient Frontier link from the scenario's content menu.

Determine Graph Options

Use the Graph Options section of the *Scenario: Efficient Frontier* page to define the budget range and the resolution level for the graph. This section is the first of three sections available on this page.

The Budget Range fields are used to zoom in on a particular portion of the graph. You can enter a value in one or both fields. If the first field is left blank, the graph starts at budgeted cost amount of zero. If the second field is left blank, the graph ends at the highest budgeted cost. Those investments that fall between the budgeted cost range are displayed on the graph.

There are two ways you can set how the efficient frontier graph will display. In the Resolution field, determine the resolution of the graph. There are three options for resolution: Low, Medium, and High. Depending on the choice you make here, the graph will display a few points (Low resolution) to many points (High resolution) on the graph. The lower the resolution you set, the quicker the efficient frontier graph will generate and load on the page.

Construct the Graph

To construct the efficient frontier graph, from the *Scenario: Efficient Frontier* page, determine your graph options, and click Generate Graph. The graph displays below the Graph Options section on the *Scenario: Efficient Frontier* page. This is second of three sections available on the page.

Until you regenerate the graph, this graph is not recalculated.

Analyze the Efficient Frontier

The efficient frontier considers all of the alternative portfolios that can be constructed from a set of investment proposals. It is made up of the best possible investments in the least-cost portfolios. The goal in optimizing your portfolio using the efficient frontier is finding the portfolio with more benefit for not much more cost.

The efficient frontier is drawn as a chart of points (candidate scenarios) with the current scenario budgeted cost as a vertical line of reference. The y-axis values shown on the graph is based on the optimization attributes you set on the *Scenario: Optimizations* page. If you define the budgeted benefit as the only optimization attribute, the y-axis value is the budgeted benefit.

When graphed for cost (x-axis) and benefit (y-axis), the efficient frontier forms a curve that starts at the origin, rises steeply, and then flattens. The efficient frontier is always curved, never straight. The points that lie on the curve are the best set of all portfolios that could exist for every theoretical investment level. Every point is higher than the one before it and its slope is always increasing. The tangent line of any point on the curve always has a positive slope. The candidate scenarios that lie below the efficient frontier are not optimal; there are no optimal scenarios for less cost with more benefit. No candidate scenarios lie above the efficient frontier.

Clicking a point on the graph opens the *Candidate Scenario Investments* page.

View the List of Candidate Scenarios

Below the graph you can view a list of candidate scenarios generated by the efficient frontier. These candidate scenarios appear in the Candidate Scenarios section of the *Scenario: Efficient Frontier* page. This section is the third of three sections available on the page.

For each point on the graph, a line item displays in the list. The candidate scenarios are sorted in the list based on their position in the graph from left to right. From this list, you can compare two different candidate scenarios to determine which scenario produces the optimal benefit for the least amount of cost. You can base your selection on score, budgeted cost, budgeted benefit, ROI, slope, or count. You can also link to a candidate scenario's details to view the investments included in the scenario by clicking a scenario's Candidate Scenario properties icon.

View Candidate Scenario Investments

The *Candidate Scenario Investments* page displays a list of the investments included in a candidate scenario. Use this page to see what values from each investment contributed to the overall scenario score. The name of the portfolio and candidate scenario appears at the top of the page.

To view this page, from the *Scenario: Efficient Frontier* page, either click the View Candidate Scenario properties icon next to the name of the candidate scenario from the list of available scenarios, or click a point on the efficient frontier graph.

On this page, you can view investment information such as the investment name, ID, type, score, budgeted cost, budgeted benefit, and budgeted ROI. If you entered optimization parameters on the *Scenario: Optimizations* page, these attributes also appear as columns in this list. From this page, you can compare two candidate scenarios, regenerate the scenario, or link to the investment's properties page.

Compare Efficient Frontier Candidate Scenarios

Use the *Compare Candidate Scenarios* page to compare two candidate scenarios from the list of scenarios in the Candidate Scenarios section of the *Scenario: Efficient Frontier* page.

There are two ways to view this page. To view this page from the Candidate Scenarios section of the *Scenario: Efficient Frontier* page, next to a candidate scenario you want to compare, click the View Candidate Scenario properties icon, and then click Compare. This scenario is used as the Base scenario from which a Comparison scenario is compared. From this same page, you can also check the box of the two scenarios you want to compare, and click Compare. In this case, the candidate scenario listed closest to the top of the list is used as the Base scenario and the other is used as the Comparison scenario.

The top section of this page displays the names of the two scenarios you chose from the list. This list compares the scenario's score, budgeted cost, benefit, ROI, slope, and count.

The third section of this page displays a list of investments contained in the base and/or comparison candidate scenario. The first column in the table, Contained In, details whether the investment is contained in the base, comparison, or both scenarios.

Use the Investments Filter section of the page—the second section on the page—to filter the list.

Add Investments to Portfolio Scenarios

The pool of investments from which you can add to your portfolio scenarios are all of the investments to which you have access rights that are in the portfolio. You can add investments to your portfolio scenario two ways. First, you can add investments manually. You can accomplish this from the *Scenario: Investments* page. You can also set optimization and constraint parameters, generate the scenario, and then alter those investments. You can add and define as many investments as you need.

To access this page, open the portfolio. On the *Portfolio Scenarios* page, select the Scenario Investments icon.

You can also access this page from an open portfolio scenario by selecting the Investments link from the scenario's content menu.

Add Investments to Portfolio Scenarios Using Power Filters

The process of adding investments to portfolio scenarios using a power filter is the process of building an expression for a particular investment type and then applying the filter. Building an expression allows you to add investments that meet the conditions you specify.

Use the Add with Power Filter button on the *Scenario: Investments* page to add investments to the scenario using a power filter expression.

Note: See the *Common Features and Personal Options User Guide* for more information.

Update Portfolio Scenario Investments Included by a Power Filter

Use the Synchronize button on the *Scenario: Investments* page to update the investments that were added to the scenario using a power filter expression. When you do this, only those investments that meet the conditions specified in the power filter and are not already included in the scenario are displayed in the list on the *Synchronize Matching Investments* page. Use this page to add those investments that now match the power filter's conditions to the scenario, and to remove those that no longer match.

Synchronize Power Filters

To synchronize a power filter

1. From the *Portfolios* page, click the name of the portfolio you want to view.
The *Portfolio Scenarios* page appears.
2. Click the Scenario Investments icon.
The *Scenario: Investments* page appears.
3. Check the box next to the expression you want to synchronize.
4. Click Synchronize.
The *Synchronize Matching Investments* page appears. All of the investments that meet the conditions of the power filter and are not already included in the scenario are displayed in the list.
5. Click Synchronize.

Add Investments to Portfolio Scenarios Manually

You can add an investment to an existing scenario manually from the *Scenario: Investments* page. You can also create a new scenario from the Investments, Gantt, and Financials portlet on the *Portfolio Scorecard* page by clicking the Grid with Plus (Add to Scenario) icon that displays next to the name of the investment. This creates a new scenario that includes the investment.

To add scenario investments manually

1. From the *Portfolios* page, click the name of the portfolio you want to view.
The *Portfolio Scorecard* page appears.
2. Click the Scenario tab.
The *Portfolio: Scenario* page appears.
3. Click the Scenario link to access scenario's details.
The *Scenario: Properties* page appears.
4. Click the Investments link from the content menu.
The *Scenario: Investments* page appears
5. Click Add.
The *Select Investments* page appears
6. Filter the list of investment as needed. Then select the check box next to each investment you want to include in the scenario. Click Add.

Exclude Investments from Scenarios

Excluding an investment from a scenario means temporarily ignoring the investment's contributions to the portfolio when calculating the values for that scenario. When you exclude an investment from a scenario, the investment is temporarily removed from the portfolio and does not appear in the portlets (while you are still in the scenario).

You can exclude both approved and unapproved investments completely from scenario calculations. When the scenario is generated, these excluded investments do not display in *Portfolio Scorecard* page portlets, even when you filter for approved or unapproved investments. However, the scenario investments you exclude completely from the scenario do display on the *Scenario: Investments* page. If an investment is excluded from a scenario, then all contributions of that investment as well as its child investments are excluded from all calculations.

To exclude an investment from a scenario

1. From the *Portfolios* page, click the name of the portfolio you want to view.
The *Portfolio Scenarios* page appears.
2. Click the Scenario Investments icon.
The *Scenario: Investments* page appears.
3. Click the Edit Scenario Details icon for an investment.
The *Scenario Details* page for the investment appears.
4. In the Scenario Details section for the investment, select the Exclude check box, and click Submit.
Your changes are saved.

Work with Scenario Investments

Using the *Scenario: Investments* page, you can:

- View a list of investments included in the scenario.
- Add or update the investments you want to include or exclude in a portfolio scenario, either manually or by using a power filter.
- Remove scenario investments.
- View and modify scenario investment details.
- Make hypothetical changes to the investments.
- View financial details of investments.
- Edit an investment's start date and planned cost.
- Hide and unhide scenario investments.
- Approve and unapprove scenario investments.
- View the effect those changes have on the investments included in this scenario.

To access the *Scenario: Investments* page, open the portfolio scenario. Select the Investments link from the scenario's content menu.

The actions you take on the *Scenario: Investments* page affect the investments displayed on the *Portfolio Scorecard* page. After generating a scenario, any changes you make on the *Scenario: Investments* page, override the constraint and optimization settings. When you regenerate the scenario, the investments listed on the *Scenario: Investments* page are removed, and new investments are added based on the constraint and optimization settings.

Hide and Show Scenario Investments

Use the *Scenario: Investments* page to temporarily omit a scenario investment's calculations from a scenario, or to reverse its omission from the scenario. When you hide an investment, it remains in the portfolio and displays on the *Portfolio Scorecard* page. The portfolio uses the plan of record data for that investment in the views and portlets. You can hide both approved and unapproved scenario investments.

To hide a scenario investment, on the *Scenario: Investments* page, set the Hidden field to Yes for that investment, and then click Save. To show an investment, set the Hidden field for that investment to No.

Like excluding an investment from a scenario, if you hide an investment and then generate the scenario, the investment will no longer be marked as "Hidden" and will be available in scenario calculations.

When you hide an investment from a scenario, any constraints you may have set for that investment are ignored.

Example

If an approved investment is unapproved per the generated scenario, and if you hide that investment, per the scenario, its status is reset to its original status of "Approved" and displays as such on the *Portfolio Scorecard* page.

Approve and Unapprove Scenario Investments

After generating your portfolio scenario, determine which investments you want to approve or unapprove for your scenario. Use the *Scenario: Investments* page to temporarily approve a scenario investment, or to reverse its approval in the scenario. If a portfolio scenario is set to "unapproved" in the scenario, then all its contributions and its child contributions are discarded from the scenario.

To approve a scenario investment, on the *Scenario: Investments* page, set the Approved flag to Yes for that investment, and then click Save. To unapprove an investment, set the Approved flag for that investment to No.

Remove Investments from Scenarios

To permanently remove a scenario investment, on the *Scenario: Investments* page, select the investment you want to remove, and then click Remove. The page refreshes and the investment no longer appears in the list.

Edit Scenario Investment Date and Cost

You can edit an investment's start date or planned cost directly from the *Scenario: Investments* page.

You can use the calendar icon to pick a new start date. If you move an investment's start date in a scenario, the investment end date is moved by the same amount. To edit the investment's cost, enter a new value in the investment's Planned Cost field.

To edit a scenario investments start date and planned cost

1. From the *Scenario: Investments* page, edit the start date for that investment, and click Save.

Your changes are saved.

View Scenario Investment Financial Summaries

To view the financial summary for an investment, on the *Scenario: Investments* page, click the Financial Summary icon for that investment. From the financial summary page of an investment, click More and select Back to Portfolio to return to the portfolio.

View Scenario Investments in Display Mode

By default, the *Scenario: Investments* page displays data in edit mode. To view data on this page in display mode, and to see and compare the changes you made to your investments, choose "Display Mode" from the Shown in drop-down. This drop-down appears on the page toolbar. When selected, the page refreshes to display any changes you made to your scenario investments. The changed values are displayed below the plan-of-record values and the plan-of-record values are red-lined.

Generate Portfolio Scenarios

Generating portfolio scenarios is one way to include investments in a scenario. This method of including investments removes the need for you to manually add investments to the scenario. When you generate a scenario, a scenario generation algorithm is used to determine which investments are to be included in the scenario. The algorithm uses the existing budget cost, specified role capacities, constraint, and optimization parameters you set for the scenario.

During the process, each possible investment is evaluated, ranked by the criteria you identified, and then included in the scenario until the scenario's budgeted cost is exceeded. If you have not identified the scenario's budgeted cost, the portfolio's budgeted cost is used. Those investments that are included in the scenario have their status marked as "Approved" in the scenario. Those not included have their status marked "Unapproved" in the scenario.

Generating a portfolio scenario clears the list of included scenario investments and adds investments to the portfolio based on the set constraints and optimization parameters. You can generate a scenario at any time—after defining scenario constraint and optimization parameters, before or after manually adding scenario investments and roles, after altering scenario investments.

To generate a portfolio scenario

1. Select Portfolios from the Portfolio Management menu.

The *Portfolios* page appears.

2. Select the name of the portfolio you want to view.

3. Click the Scenario tab.

The *Portfolio Scenarios* page appears.

4. Select the name of scenario you want to generate.

The *Scenario: Properties* page appears.

5. Click Generate.

Note: If you have already generated the graph, or if there are investments listed on the *Scenario: Investments* page, the *Regenerate Scenario Confirmation* page appears.

6. Confirm the prompt by clicking Yes.

Compare Portfolio Scenarios

You can compare two scenarios either side by side or top to bottom, including all the investments and their various metrics in a grid or graphical format. You can compare two different portlets of the same type representing two scenarios. This allows you to plan your portfolios more efficiently by looking at two different scenarios at the same time and determining which one is the best one.

For grid portlets, you can compare two scenarios in a single portlet using red-lining to compare the values in the two scenarios.

On the Scorecard and Analyze tabs (where you can compare scenarios), after selecting a value from a drop-down on the page's toolbar, you must click Filter.

To compare two different portfolio scenarios side-by-side

1. Select Portfolios from the Portfolio Management menu.
The *Portfolios* page appears.
2. Select the name of the portfolio you want to view.
3. Select the Scorecard or Analyze tab.
4. From the *Portfolio Scorecard* page or *Portfolio Analyze* page, choose a scenario from the Scenario drop-down.
5. To compare another scenario with the first scenario, choose a scenario from the Compare To drop-down.
6. Click Filter on the page toolbar.

If the page is in maximized view, only the Investments portlet appears by default. From the drop-down menu that appears on this portlet's toolbar, select a different portlet to view.

Compare Scenario Example

You, as the portfolio manager, log in to CA Clarity PPM and open a portfolio. Your goal is to find out how best you can achieve the development release goals and the customer commitment for certain features. To do this, you create two portfolio scenarios:

Scenario 1 has a budget of \$1,000,000. In the scenario you select all projects related to the next release and all projects related to all customer enhancement requests and you notice that you will need close to \$2,000,000 to complete both sets of projects. This leads you to create another scenario.

Scenario 2 pins only those projects related to core code development, does not select other projects related to hosting new code for sales and marketing departments. You also pin the projects related to key customers. After generating the scenario, you notice that within the budget cost you can accommodate some more projects related to development or customer. You are still not sure and would like to compare both scenarios.

For both scenarios, you want to make sure that you plan for projects that are not at risk and have a good alignment with the company's goals for the current year. To do this, you compare the two scenarios. You select Scenario 1 from the Scenario drop-down and Scenario 2 from the Compare Scenario drop-down on the Scorecard toolbar. Both portlets display side by side as a default.

You notice on the Investments portlet that two of the customer projects are at higher risk than the development projects. You believe that the projects are at risk because the requirements are not clear enough. You feel that these projects should not be rushed and need more research before development of the customer related projects begin. You are able to push the customer related projects out to the last 3 months of your portfolio and thereby pull in more core code development projects.

Expected Behavior When Comparing Scenarios

When performing a side-by-side comparison of two scenarios, the following lists the expected behavior on pages and portlets:

The graph portlets show two graphs (that is, two portlet instances) representing two scenarios side by side. If you do not select a Compare Scenario, then only one portlet is displayed.

The grid portlets show a row for each investment with stacked values for some attributes, representing variances in the two scenarios. Red-lining appears to allow you to distinguish the attribute values for the two scenarios. Other than time scaled values, all attributes with a "(Compare To)" suffix display red-lining for scenario comparison. If you do not select a Compare Scenario, then stacked rows and red-lining does not appear.

Personalizations only apply to each instance of a portlet on the page. For example, if you personalize one pie chart in a side-by-side layout of two pie charts, only the personalized one changes. Customizations made at the administrative level apply to both pie charts because there is only one "type" of chart although it appears multiple times on the same page.

The Compare To scenario (right) list is dynamically built based on the value you select in the Scenario (left) list.

Only values that are eligible for editing while in the scenario are editable. This rule applies to the left scenario only. The right scenario is never editable when comparing two scenarios.

Filtering only applies to the left scenario data (for example, you can show only approved investments or hard booked team members).

The values on a page default to the "plan of record" when you do not have a scenario selected.

For grid portlets, the left scenario data displays on the bottom line whenever the two selections have differing values. If data is the same, only one value appears.

For grid portlets, the right scenario data displays on the top line and is red-lined whenever the two selections have differing values. If data is the same, only one value appears.

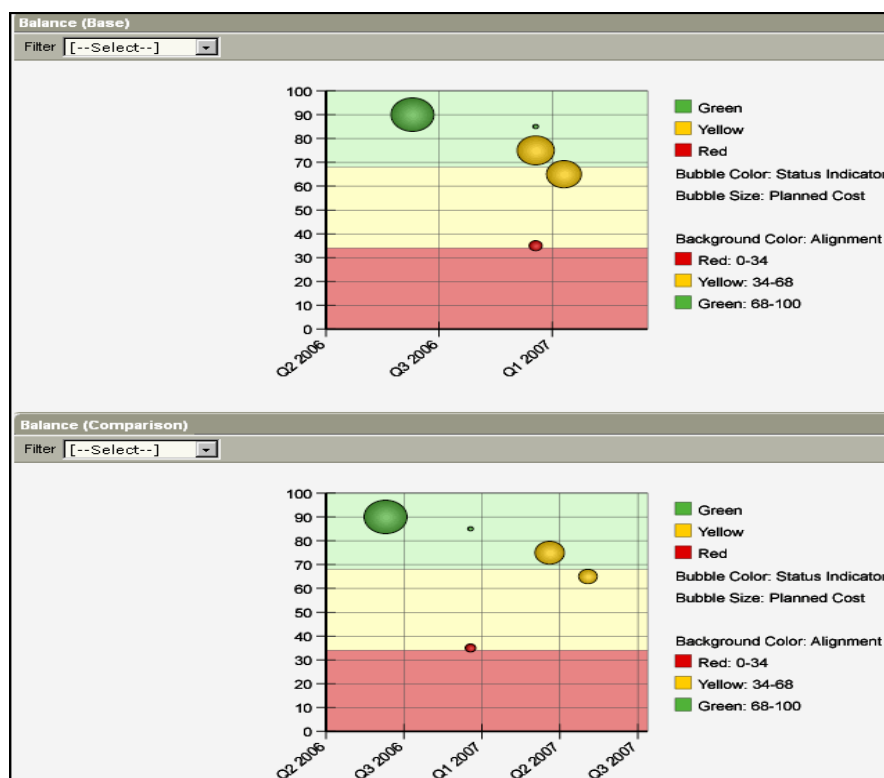
When you navigate between portfolio scenario-enabled pages, the selected portfolio scenarios persist – that is, the portfolio scenario selections apply application-wide and appear on all portfolio scenario-enabled pages. A portfolio scenario-enabled page is one from where you can create or select a portfolio scenario using the Portfolio toolbar.

A special value [-- None --] allows you to display only the left scenario data without comparing it against any other scenario or the plan of record. This value is only available in the right scenario list.

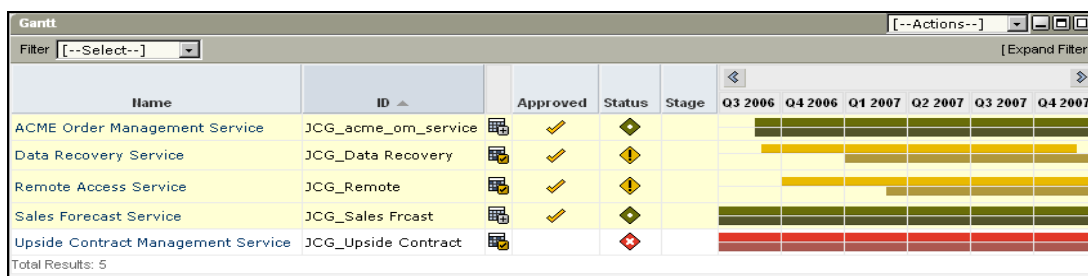
The Investments portlet *Portfolio Scorecard* page compares the two scenarios using stacked rows and red-lining. The scenario data that you selected from the Scenario drop-down appears on the bottom row. The scenario that you selected from the Compare To drop-down appears on the top row (with a red line if it differs from the bottom row).

Portfolio Scorecard (Portfolio: Project Everest)											
Properties			Contents			Scenarios			Scorecard		
Analyze											
Portfolio		Project Everest		Scenario		2006 Plan A		Compare To		2006 Plan B	
Status		All		Portfolio Roles		All		Booking Status		All	
Filter		More >>									
Investments											Investments
Filter		[--Select--]									
Investment	ID		Priority	Goal	Alignment	Risk	Stage	Start	Planned Cost	Actual Cost	Remaining Cost
asset_1	asset_1		10		◇	◇	<div></div>	11/21/06	500,000.00 USD		500,000.00 USD
CRM Implementation	CRM		10		◇	◇	<div></div>	9/7/06 9/9/06	400,000.00 USD 491,379.31 USD		400,000.00 USD 491,379.31 USD
R&D Software	asset1		10		◇	◇	<div></div>	9/7/06 8/8/06	7,000.00 USD 10,000.00 USD		7,000.00 USD 10,000.00 USD

The Balance portlet on the *Portfolio Scorecard* page compares the data in the two scenarios by displaying two different bubble graphs. The Base bubble graph on the top represents the scenario you selected from the Scenario drop-down. The Comparison bubble graph on the bottom represents the scenario you selected from the Compare To drop-down.



The *Portfolio Scorecard* page compares the data in the two scenarios using a primary bar and a secondary bar. The primary bar at the bottom represents the base scenario and the secondary bar at the top represents the comparison scenario.



The Financials portlet on the *Portfolio Scorecard* page compares the data in the two scenarios using stacked rows and red-lining (as in the case of the Investments portlet).

Financials								
Filter: [--Select--]								
Investment	ID		Planned Cost	Planned Benefit	Portfolio Planned ROI	Portfolio Planned NPV	Planned Break even	
asset_1	asset_1		500,000.00 USD	0.00 USD	-100%	-500,000.00		
R&D Software	asset1		7,000.00 USD 10,000.00 USD	0.00 USD	0%	0.00		
CRM Implementation	CRM		400,000.00 USD 491,379.31 USD	0.00 USD	0%	0.00		

Configure a Portfolio Planning Grid

When planning a portfolio using the data grids on the Scorecard or Analyze tabs, you can configure the grids to do the following:

- Include an additional attribute as a secondary comparison value for a list column.
- Display secondary values (even if they are null).
- Use redlining to compare list column values with their secondary values.

Communicate Portfolio Scenarios

Once you have analyzed your portfolio and optimized it using scenario-based planning, communicate the changes you may have made to the portfolio. Changes to the scenario investments are not automatically applied to investments.

The *Communicate Scenario* process is an out-of-the box scenario process. It facilitates the notification process by communicating directly to investment managers and owners via an action item of the changes they should make to their investments.

By default, this process is not active. It must be validated and activated before you can start it. Your CA Clarity PPM administrator can also customize the process with additional business rules and approvals.

Note: Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Start the Communicate Scenario Process

The *Scenario Communication Confirmation* page displays a complete list of investments in a scenario (one investment per row). Each item includes the investment type, the manager's name, and a description of the change described by the scenario.

If your CA Clarity PPM administrator has granted you access to more than one scenario process or if this process is not active, an error will occur when you communicate the scenario. You can only have access to one scenario process at any given time.

To start the communicate scenario process

1. From the *Portfolio Scenarios* page, check the box next to the scenario you want to send, and then click Communicate Scenario.

For each selected investment, an action item is sent to the investment manager. The action item identifies the investment and instructs the owner to make the changes to the investment that corresponds to the changes defined in the scenario.

Use Scenarios to Evaluate Portfolios

Once you build your portfolio scenario, it is automatically selected in the portfolio so that you can see how changes affect the portfolio. You can view the effects of the scenario from the *Portfolio Scorecard* or the *Portfolio Analyze* pages. The values you defined in the scenario are used to evaluate the investments contained within the portfolio. For example, if a scenario imposes a budgeted cost override of \$1M, this figure is used as the basis for evaluating investments.

You can evaluate your portfolio by choosing a scenario from the Scenario drop-down. This drop-down displays on the page toolbar on the *Portfolio Scorecard* or *Portfolio Analyze* pages.

Once you select the scenario to evaluate your portfolio, this scenario becomes the current scenario.

Copy Portfolio Scenarios

You can create scenario copies that are exact copies of an existing portfolio scenario. The new scenario's title the same as the original scenario, except its name is preceded by "Copy of". Also, the owner of the copied scenario is the name of the user currently logged in to CA Clarity PPM.

Once you have made a copy, you can modify its properties. This includes modifying the scenario's name, adding or modifying the scenario's constraints and parameters, and providing access rights to the scenario.

To copy a portfolio scenario

1. Open the portfolio.
The *Portfolio Scorecard* appears.
2. Click Scenarios.
The *Portfolio: Scenarios* page appears.
3. Check the box next to the scenario you want to copy, and click Copy.
A copy of the selected scenario is added to the list and is named "Copy of <Scenario Name>".
4. Click the name of the scenario.
The *Scenario: Properties* page appears.
5. Give the copied scenario a new and unique name, and click Submit.
Your changes are saved.

View and Modify Portfolio Scenarios

To view and modify the scenario, open the scenario. With the scenario open, you can use any of the scenario's pages—*Scenario: Properties*, *Scenario: Constraints*, *Scenario: Optimizations*, *Scenario: Efficient Frontier*, *Scenario: Investments*—to view and modify the scenario.

View and Modify the Scenario's Properties

Use the *Scenario: Properties* page to modify the portfolio scenario's properties. This includes the scenario's name, description, owner, and its planned cost and benefit.

To modify the portfolio scenario's properties

1. Select Portfolios from the Portfolio Management menu.
The *Portfolios* page appears.
2. Select the name of the portfolio you want to view.
3. Click the Scenario tab.
The *Portfolio Scenarios* page appears.
4. Select the name of a scenario.
The *Scenario: Properties* page appears.
5. Update the fields.
6. Click Save. The portfolio scenario's properties are updated.
The page reflects the changes.

View and Modify the Scenario's Investments

Use the *Scenario: Investments* page to view the list of scenario investments. This list includes the investments that can be modified in this scenario.

To access this page, open the portfolio scenario. Select the Investments link from the scenario's content menu.

View and Modify Scenario Investment Details

Use the *Scenario Details* page to view investment data and to make hypothetical changes to this data. For example, you can shift an investment's start date out or delay lower priority investments. You can modify the scenario investment's start date, planned cost and benefits, approval status, and priority values. You can also completely exclude investments from portfolio calculations.

To access this page, from the *Scenario: Investments* page, click the Edit Scenario Details icon next to the investment you want to modify.

The Actual Details section displays the investment's plan of record data. This information is collected from data on the investment's properties pages and is read-only.

From the Scenario Details section, you to make hypothetical changes to the investment's contributions. Any changes you make do not affect the investment's actual data. Instead, these changes are used to calculate the investment's demand within the current scenario. It can be used by portfolio managers to make investment scheduling decisions that support corporate initiatives.

The following fields appear in the Scenario Details section:

Start Date

The hypothetical start date for this investment.

Planned Cost

The hypothetical total self cost for this investment.

Planned Benefit

The hypothetical total self benefit for this investment.

Approved

Select to hypothetically set the investment's status to "Approved".

Exclude

Select to completely remove and exclude this investment from the portfolio's calculations in the scenario.

Priority

The hypothetical priority for this investment.

View and Modify Expression Scenario Details

Use the *Expression Scenario Details* page to make hypothetical changes to all of the scenario investments represented by the expression. From this page, you can modify the start date, planned cost and benefits, approval status, and priority for all of the investments represented by the expression. You can also completely exclude these investments from portfolio calculations.

To access this page, from the *Scenario: Investments* page, click the Edit Scenario Details icon next to the expression you want to modify.

Use the fields on this page to make hypothetical changes to the budget and cost data of investments represented by the expression. The changes you make and submit on this page do not affect plan of record data. Instead, the modifications you make here are used in calculating contributions within the current scenario, and can be used by portfolio managers to make investment scheduling decisions that support corporate initiatives.

The following fields appear on this page:

Start Date

The hypothetical start date for these investments. Use this field to move all of the investments represented by this expression forward or backward.

Planned Cost

The hypothetical self cost for these investments. Use this field to modify the self planned cost of all of the investments represented by this expression.

Planned Benefit

The hypothetical self benefit for these investments. Use this field to modify the self planned benefit of all of the investments represented by this expression.

Approved

Select to hypothetically set the status of all of the investments represented by this expression to "Approved".

Exclude

Select to completely remove and exclude all of the investments represented by this expression from the portfolio's calculations.

Priority

The hypothetical priority for all of the investments represented by this expression.

Resource Capacity Planning with Portfolio Scenarios

The portfolio scenarios you create to see what-if changes to resource capacity can be accessed from investment and resource planning pages. Once you have created your portfolio scenario, you can use the scenario to determine the resource implications of the decisions you make to your portfolio investments.

To access your portfolio scenario from an investment or from resource planning pages, choose the scenario from the Scenario drop-down on the Scenario toolbar.

Delete Portfolio Scenarios

When you no longer need a portfolio scenario, you can delete the scenario from the portfolio.

To delete a portfolio scenario

1. Select Portfolios from the Portfolio Management menu.
The *Portfolios* page appears.
2. Select the name of the portfolio you want to view.
3. Click the Scenario tab.
The *Portfolio Scenarios* page appears.
4. Check the box next to the scenario you want to delete.
5. Click Delete.

The selected scenario is deleted and no longer displays in the list.

Capacity Planning Scenarios

Capacity planning scenarios allow you to make informed decisions about resource demands and staffing. Using this tool you can make tentative modifications to team allocations in a scenario context. This means that you can create a scenario and within that scenario you can make temporary changes to your data to see how they affect your overall capacity plan. These temporary changes are never saved or applied to your actual data. They are just used for analysis before making actual changes.

Based on the criteria you enter and update, the capacity planning scenario changes the demand data that is displayed on the page. Filters offer you the ability to exclude or include to-be-hired resources and soft bookings. When the list of investments consists of those you want to include in your capacity planning activities, you can build capacity planning scenarios to study and anticipate utilization.

Capacity planning scenarios are investment aware; the demand from staffing for all investment types (such as projects, assets, and applications) in CA Clarity PPM is counted and displayed when viewing data in the context of a scenario.

A capacity planning scenario is automatically available to all investments; you do not have to manually add those investments to the scenario. You only need to explicitly add the investments to which you want to make tentative modifications.

If any changes are made to an investment while in a scenario, the investment is automatically added to the scenario's investments list. You can hide an investment from a scenario to display the investment's original or plan-of-record value. You can also exclude an investment from a scenario to remove it from consideration completely.

Capacity Planning Scenario Behavior

The following lists how a capacity planning scenario behaves:

- You can link a capacity planning scenario to a portfolio as an optional attribute when you initially save the scenario. This makes the capacity planning scenario accessible from the portfolio.
- When you start in an investment and select a capacity planning scenario, it sets that scenario as the "current application scenario" but only for pages that respond to capacity scenarios.
- While in a capacity planning scenario, and when you are on a scenario-enabled page, editing an investment that is not already in the scenario automatically adds the investment to the scenario.

Terms Used in Capacity Planning Scenarios

The following terms are introduced in capacity planning scenarios:

Capacity

This is the total availability of resources (labor or otherwise) grouped by resources, roles, or OBS units.

Demand

Demand is the sum of all task assignments by investment allocation. Demand consists of one of the following:

- Allocation demand or the time that a resource is designated to perform work on an investment.
- Assignment demand or the total of the task assignment in an investment. Task assignment information sums actual and estimate-to-complete (ETC). This is also known as assignment demand.

Unfilled Demand

This is the demand to which roles are allocated for an investment.

Unused/Available Capacity

This is total capacity minus total allocation demand. Negative unused capacity indicates over-allocation.

Unassigned Work

This is total investment allocation minus total investment assignment allocation. Negative unassigned work shows where the assignment allocation exceeds the investment allocation.

Using Capacity Planning Scenarios

You can create and use capacity planning scenarios to make tentative modifications to team allocations and assignments. Accordingly, you will learn how to evaluate and modify your actual plan of record to get the results you desire.

Capacity Planning Overview

Use capacity planning scenarios to address situations similar to the following:

- A development manager who manages a portfolio of investments for several business units must make room for a new investment request.
- A line manager with 20 direct reports must frequently review the resource deployment status to identify those resources that may be under- or over-allocated.
- A line manager who shares resources with other organizations must have visibility into the demand for those resources, thus requiring the access to data across multiple OBS.
- A project manager creates a new project from a template and wants to find out when it can get done.

Capacity Planning Scenario Access Rights

You can grant resources access rights to specific capacity planning scenarios. Anyone can create a scenario if they have access rights to scenario-enabled pages.

You need the following rights to access and work with capacity planning scenarios:

Scenario - Edit

Allows you to add investments to scenarios and edit those scenarios. This right also allows you to delete scenarios.

Type: Global

Scenario - View

Allows a resource to view a scenario if the resource has view access to that portfolio and the resource has been granted the *Portfolio - Navigate* access right. If this right is granted with respect to a scenario that is not attached to a portfolio, this allows the resource to view a scenario if the resource has also been granted the *Management - Capacity Planning* access right.

Type: Global

Scenario - Navigate

Allows you to view the **Scenario** toolbar on capacity planning scenario-enabled pages and create new scenarios.

Type: Global

Capacity planning scenarios are designed for you to view a subset of all resources or investments. It is recommended that you limit your access rights with either a security OBS or with instance-level resource access rights. By doing so, a manageable amount of data will load for those resources and investments you manage.

It is recommended that you avoid accessing capacity planning scenarios as a CA Clarity PPM administrator or as a user with global access rights to all resources.

Access and Use Capacity Planning Scenarios

You can access and create your capacity planning scenarios from any CA Clarity PPM page that displays the Scenario toolbar. The Scenario toolbar, if it appears on a page, indicates the page is scenario-enabled. This means that you can create capacity planning scenarios from the page.

The gold Scenario toolbar, if it appears on a page, indicates that you are in a scenario. If you exit the scenario by selecting Plan of Record, the toolbar changes back to the grey color.

While in a scenario, if you drill down to an editable page, you receive a yellow alert banner.

The capacity planning and portfolio scenarios that you can choose from the Scenario drop-down are the ones for which you have view or edit rights.

When you select an existing scenario from the Scenario toolbar or click New to create a new scenario, the toolbar changes to yellow. The yellow color indicates that you are viewing and modifying scenario data and not actual or plan of record data. The plan of record is not affected by the changes you make in a scenario. To exit a scenario at any point, from the Scenario drop-down, choose Plan of Record. The yellow color disappears from the Scenario toolbar.

From scenario-enabled pages, you can do the following:

- Display tentative information for capacity scenarios
- Switch between the plan of record and the various individual scenarios
- Compare scenarios with other scenarios

When comparing two scenarios, the red-lined values indicate either the plan of record values or a second scenario values to which you are comparing the current scenario values. No red-lining appears when you view a scenario by itself or view plan of record data by itself.

Work with Capacity Planning Scenarios

Use the scenario-enabled pages to create scenarios and use them as guidelines for planning your investments. You can do the following from scenario-enabled pages:

- Filter on a scenario
- Create new scenarios
- Edit existing scenarios
- Compare scenarios
- Manage investments in a scenario
- Make changes to investments
- Manage scenarios
- Share scenarios

Filter Investments and Resources for Analysis

By default, all resources and investments to which you have access are displayed in a capacity planning scenario. Use the filters on scenario-enabled pages to restrict the investments, roles, or resources that have no relevance to your capacity analysis and to show a subset of the data currently presented on the page. You can save the parameters of the most recent filter operation across sessions to eliminate the need to redefine a new filter for each capacity analysis.

Note: See the *Common Features and Personal Options User Guide* for more information.

Create Capacity Planning Scenarios

You can create multiple scenarios from any scenario-enabled page and share them among other resources or you can opt to keep them private. By default, scenarios are private.

Pages that are scenario-enabled display the Scenario toolbar just below the page's subtabs. When you view tentative data by creating a scenario, the toolbar turns yellow.

When creating a scenario, you have the option to link it to a portfolio. This makes the scenario accessible from the portfolio. However, you can only do this by creating a scenario from the *Capacity Planning Scenarios* page.

You can also create scenarios from the *Manage Scenarios* page.

To create a new scenario

1. On the Scenario toolbar, click New.
The scenario is named "New Scenario" by default.
2. Rename the new scenario and specify the scenario properties.
3. Click More on the Scenario toolbar and select Edit.
4. From the *Scenario Properties* page, click the Investments link to include the desired investments in this scenario.
5. From the *Scenario Properties* page, click the appropriate Access links to provide resources with access rights to this scenario.
6. Make temporary changes to your investments, resources, or team data as needed to see how these changes compare to the plan of record for an investment.

For example:

- a. While in a scenario, make desired changes to all your future investments and save. You can change the investment start date, change resource allocations, or add more time to your investment.

Note: See the *Project Management User Guide* for more information.

- b. From the *Scenario Investments* page, approve your future investments to see what effects they will have on your current work capacity. You can also approve your investments from the individual investments page.
- c. Access the Role Capacity portlet on the *Resource Planning: Capacity* page to review the results of your changes. Switch between the different Resource Planning portlets to evaluate capacity and demand in different ways within the scenario. This can help you decide if you need to make any adjustments.
- d. On the Role Capacity portlet, drill down on one of your overallocated roles to access the *Role Properties* page.

- e. Click the Allocations tab to access the *Resource Planning: Allocations* page. From the Actions menu on the page, select Edit Mode.
- f. Edit a role's allocation to reduce it or shift the allocation dates.
- g. Save your changes.
- h. Click the Capacity tab to access the *Resource Planning: Capacity* page to see how your changes affect the overall capacity plan and figure out if other changes are needed to help in the planning process.

Note: See the *Resource Management User Guide* for more information.

- i. Make any further required changes to adjust your role allocations, add more investments, shift investment dates, or approve or un-approve investments.
- j. Save your changes as needed.
- k. Use this scenario as a guide to modify your current investments.

Edit Capacity Planning Scenario Properties

Owners of capacity planning scenarios have implicit rights to edit their scenarios. Scenario owners can also grant instance access rights to their capacity planning scenarios. You can copy a scenario and edit the new copy. When you do this, you become the owner of the new capacity planning scenario copy.

Once you select a scenario, any editing or actions you do are applied to the scenario and *not* to the plan of record or actual data. Also, if you edit an investment that was not explicitly added to the scenario, the investment gets automatically added to the scenario in the background. For example, if you make a change to a team record while in a scenario, but the team record (and the associated investment) is not already in the scenario, then the investment and all team records are automatically added to the scenario in the background. To edit plan of record data, from the Scenario toolbar, choose Plan of Record from the Scenario drop-down.

When editing capacity planning scenarios or portfolio scenarios from a capacity planning page, you can edit a limited number of field values for scenario properties, investments, and team properties. The uneditable fields appear as read-only. If you do not have the required rights to edit a scenario, all fields on all scenario pages appear as read-only.

You can also remove or add new investments to this scenario.

Note: When you are in context of a scenario and the page is in edit mode, the edits you make are saved as part of the selected scenario.

To edit a capacity planning scenario

1. On the Scenario toolbar, choose the scenario you want to edit from the Scenario drop-down, click More and select Edit.

The *Scenario: Properties* page appears.

2. Complete the following fields:

Scenario Name

Enter or change the name of the scenario.

Portfolio

This field is read-only because you cannot change the portfolio to which a capacity planning scenario is linked after the scenario is initially saved.

Description

Enter a description of the scenario.

Owner

The resource that created the scenario appears by default. You can click the **Browse** icon and select a different resource as the owner.

Planned Cost

Enter the planned cost.

Planned Benefit

Enter the planned benefit.

3. Click Save.

By Example: Compare Capacity Planning Scenarios

You can compare a scenario with the plan of record or with another scenario. This allows you to see how the latest scenario changes compare to the plan of record or the last round of changes. When you are comparing scenarios, red-lining appears on the page to help you distinguish between the two sets of data.

Besides the resource and capacity planning pages, the ability to compare scenarios using red-lining appears on all project team and some project task pages.

To compare a set of scenarios

1. From the Scenario toolbar, select a scenario.
2. Choose the plan of record or a second scenario to which you want to compare the first scenario from the Compare To drop-down.
3. Navigate through the pages to compare different aspects of the scenarios. Switch between the investment and resource pages to compare role capacity and allocation.

To see the scenario details as standalone entries without the red-lining, select your planning scenario from the left scenario drop-down and choose "None" from the right scenario drop-down.

Scenario 1 is compared with the plan of record. The plan of record data is red-lined and scenario data appears below it. You can compare the resource allocation dates, allocation amounts, and ETC.

Projects Team: Staff

(Projects: K2_sw_development)

(Manage Projects Tabs)

PropertiesTeamTasksFinancial PlanChargebacksHierarchyRisks/Issues/ChangesProcessesAudit TrailDashboard

StaffDetailRole CapacityParticipantsParticipant GroupsRequisitions

ScenarioScenario1NewMore >>Compare To[--Plan of Record--]

Project Team

FilterSystem Default

		Resource		Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation
<input type="checkbox"/>		Abrams, Peter		Business Analyst		Soft	New	7/24/06 8/1/06	12/31/06	69.6%	646
<input type="checkbox"/>		Aguirre, Debra		Developer		Soft	New	7/24/06 8/1/06	12/31/06	100.0%	87
<input type="checkbox"/>		Allard, Diana		Business Analyst		Soft	New	7/24/06	12/31/06	100.0% 80.0%	73
<input type="checkbox"/>		Business Analyst		Business Analyst		Soft	New	7/24/06	12/31/06	100.0% 80.0%	73
<input type="checkbox"/>		Developer		Developer		Soft	New	7/24/06	12/31/06	100.0%	94

Total Results: 5

Individual task dates got pushed out for an investment due to schedule changes.

Projects Tasks: Task List (Projects: Project_Alpha) [Manage Projects Tabs]

Properties Team **Tasks** Financial Plan Chargebacks Hierarchy Risks/Issues/Changes Processes Audit Trail Dashboard

Task List : Work Breakdown Structure : Resource Utilization : Assignments : Forms

Scenario Scenario2 New More >> Compare To [--Plan of Record--]

Task Filter [--Act]

Filter System Default

<input checked="" type="checkbox"/>	Task ▲	ID	Start	Finish
<input type="checkbox"/>	feature development	t1	7/24/06 8/1/06	7/31/06 8/8/06
<input type="checkbox"/>	qa testing	t2	8/1/06 8/9/06	8/30/06 9/7/06
<input type="checkbox"/>	review		9/1/06 9/9/06	9/15/06 9/23/06

The investment staffing data is compared against two scenarios. You can compare the following data types for each investment team member between Scenario 1 and Scenario 2:

- The allocation start and finish date
- The total allocation hours
- The ETC

Projects Team: Staff (Projects: project_alpha) [Manage Projects Tabs]

Properties **Team** Tasks Financial Plan Chargebacks Hierarchy Risks/Issues/Changes Processes Audit Trail Dashboard

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

Scenario Scenario 2 New More >> Compare To Scenario 1

Project Team - Filter

Filter System Default

<input checked="" type="checkbox"/>	Resource ▲	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation
<input type="checkbox"/>	Abrams, Peter		✓	Soft	New	7/15/06 7/1/06	9/16/06 9/2/06	100.0% 100.0%	360.00 360.00
<input type="checkbox"/>	Administrator, Niku		✓	Soft	New	7/15/06 7/1/06	9/16/06 9/2/06	100.0% 100.0%	360.00 360.00
<input type="checkbox"/>	Aguirre, Debra		✓	Soft	New	7/15/06 7/1/06	9/16/06 9/2/06	100.0%	360.00
<input type="checkbox"/>	Allard, Diana		✓	Soft	New	7/15/06 7/1/06	9/16/06 9/2/06	100.0% 80.0%	360.00 288.00
<input type="checkbox"/>	Anderson, Robert		✓	Soft	New	7/15/06 7/1/06	9/16/06 9/2/06	100.0%	360.00
<input type="checkbox"/>	Arokiasamy, Antonisamy		✓	Soft	New	7/15/06 7/1/06	9/16/06 9/2/06	100.0% 50.0%	360.00 180.00

Total Results: 6

More >>

Configure Capacity Planning Data Grids

You can configure a capacity planning data grid to do the following:

- Include an additional attribute as a secondary comparison value for a list column.
- Display secondary values (even if they are null).
- Use red-lining to compare list column values with their secondary values.

The above configurations only apply when you are comparing a scenario to another scenario or to the plan of record. The configurations do not apply when you select the plan of record or when you are not comparing a scenarios (that is, you have chosen "None" from the Compare To drop-down on the Scenario toolbar).

Adding a Secondary Comparison Value

To include an additional attribute as a secondary comparison value

1. From any capacity planning page that displays data in a grid format (for example, *Project Team: Staff* page), choose "Configure" from the Actions drop-down.

The *Configure: List Column Layout* page appears.

2. From the content menu on the left, click Fields.

The *Configure: List Column Fields* page appears.

3. Next to the attribute or column label (for example, **% Allocation**) for which you want to include a secondary option, click the Properties icon.

The *List Column Field* page appears.

4. Choose the secondary value that you want to include on the grid for the selected attribute from the Secondary Value drop-down.

For example, select Default Allocation (Compare To) as a secondary value for the % Allocation attribute.

5. Click Submit.

Secondary values have the words "(Compare To)" suffixed at the end.

Displaying Secondary Values and Red-lining

To display secondary values with red-lining

1. From any capacity planning page that displays data in a grid format (for example, *Project Team: Staff* page), choose "Configure" from the Actions drop-down.

The *Configure: List Column Layout* page appears.

2. From the content menu on the left, click **Options**.

The *Configure: List Options* page appears.

3. Select the following display options:

- Mouseover and redline text
- Show Null Secondary Values

4. Click Save and Exit.

After making the above configurations, you can go back to your capacity planning grid page to view the results.

View Null Comparison Data

The following compares Scenario 1 with plan of record. Note that for resource Danielle Boggs, dashes (--) appear instead of a secondary value. When Scenario 1 was created, Danielle was not included in the project team. She was added to the team later on and no comparison data appears for her on the grid for Scenario 1.

Projects Team: Staff (Projects: project_alpha) [Manage Projects Tab]									
<div>Properties Team Tasks Financial Plan Chargebacks Hierarchy Risks/Issues/Changes Processes Audit Trail Dashboard</div> <div>Staff Detail Role Capacity Participants Participant Groups Requisitions</div>									
<div>Scenario Scenario 1 New More >> Compare To [--Plan of Record--]</div>									
Project Team - Filter									
Filter System Default									
<input type="checkbox"/>	Resource	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation
<input type="checkbox"/>	Abrams, Peter			✓ Soft	New	1/1/06	12/31/06	100.0% 50.0%	2,000.00 1,040.00
<input type="checkbox"/>	Aguirre, Debra			✓ Soft	New	1/1/06	12/31/06	100.0%	2,080.00
<input type="checkbox"/>	Allard, Diana			✓ Soft	New	1/1/06	12/31/06	100.0%	2,080.00
<input type="checkbox"/>	Boggs, Danielle			✓ Soft	New	1/1/06 -- --	12/31/06 -- --	100.0% -- --	2,000.00 -- --
<input type="checkbox"/>	Borkenhagen, Julia			✓ Soft	New	1/1/06	12/31/06	100.0%	2,080.00
Total Results: 5									

The following compares Scenario 2 with Scenario 1. In this case, a straight red line appears with no value for Danielle Boggs for Scenario 1. Danielle Boggs was not a part of the project team when Scenario 1 was created. But when Scenario 2 was created, she was already a part of the project team. A secondary value corresponding to Scenario 2 appears on the grid.

Projects Team: Staff (Projects: project_alpha) [Manage Projects Tab]									
<div>Properties Team Tasks Financial Plan Chargebacks Hierarchy Risks/Issues/Changes Processes Audit Trail Dashboard</div> <div>Staff Detail Role Capacity Participants Participant Groups Requisitions</div>									
<div>Scenario Scenario 2 New More >> Compare To Scenario 1</div>									
Project Team - Filter									
Filter System Default									
<input type="checkbox"/>	Resource	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation
<input type="checkbox"/>	Abrams, Peter			✓ Soft	New	1/1/06	12/31/06	50.0%	1,040.00
<input type="checkbox"/>	Aguirre, Debra			✓ Soft	New	1/1/06	12/31/06	100.0%	2,080.00
<input type="checkbox"/>	Allard, Diana			✓ Soft	New	1/1/06	12/31/06	100.0%	2,080.00
<input type="checkbox"/>	Boggs, Danielle			✓ Soft	New	1/1/06	12/31/06	100.0%	2,080.00
<input type="checkbox"/>	Borkenhagen, Julia			✓ Soft	New	1/1/06	12/31/06	100.0%	2,080.00
Total Results: 5									

Manage Investments in Capacity Planning Scenarios

Investments can be added to scenarios manually or by using a power filter, or automatically when editing the investment attributes (for example, when you change the investment's start date or a team member's allocation). When an investment is added to a scenario, all associated team members are also added automatically to the scenario.

To add investments to a capacity planning scenario

On the *Scenario: Investments* page, do one of the following:

- To add specific investments, click Add. On the *Select Investments* window, select the investments to include, and click Add.
- To add investments meeting certain filtering criteria, click Add with Power Filter. The *Select Investment Type* page appears. Select an investment type and click Next. The *Power Filter* page appears. From this page you can build an expression that filters for investments. For example, to add investments managed by Sue Smith to the scenario, add the following expression:

Investment Manager = 'Smith, Sue'

Note: See the *Common Features and Personal Options User Guide* for more information.

Note: If you add investments using a power filter, you can change data for an "investment expression" and have it automatically propagated to all investments that were added using that "investment expression." You need to synchronize the investments occasionally to bring them up-to-date.

Temporarily Hide Investments from Capacity Planning Scenarios

To temporarily ignore changes for an investment in a scenario so that the plan of record values show instead, you can hide that investment from the scenario. You can also un-hide an investment so the scenario values show again.

To display a hidden investment, choose No from the Hidden drop down.

To temporarily hide investments from capacity planning scenarios

1. From a page that displays the Scenario toolbar, click More and select Investments.
The *Scenario: Investments* page appears.
2. Next to each investment you want to hide, choose Yes from the Hidden drop down, and click Submit.

The investment is temporarily hidden from the capacity planning scenario.

Remove Investments from Capacity Planning Scenarios

Removing an investment from a scenario removes any changes to that investment from the scenario. The investment then shows the plan of record values.

To remove an investment from a capacity planning scenario

1. From a page that displays the Scenario toolbar, click More and select Investments.

The *Scenario: Investments* page appears.

2. Select the check box next to the investment you want to remove, and then click Remove.

The selected investment is removed from the capacity planning scenario.

Make Hypothetical Changes to Investments in Capacity Planning Scenarios

You can make hypothetical changes to investments in capacity planning scenarios.

To edit a capacity planning scenario's investments

1. From a page that displays the Scenario toolbar, click More and select Investments.

The *Scenario: Investments* page appears.

2. Edit the following investment attributes as needed:

Start

Edit the investment start date.

Planned Cost

Edit the planned or budgeted cost for the investment.

Approved

Approve or disapprove an investment.

Hidden

Temporarily hide or unhide an investment from the scenario.

3. Click Save.

Your changes are saved.

Edit Investment Details in Capacity Planning Scenarios

You can edit other details for investments in a capacity planning scenario using the *Investment Scenario Details* page. The Actual Details portlet shows plan of record information for the investment, such as the investment start and finish dates, priority, and approval status. The Scenario Details portlet allows you to alter certain properties of the investment, which affect the capacity or demand of the investments and resources for purposes of analysis within the context of the scenario.

By modifying values on this page, the effect these changes have on plan of record data is calculated and then presented on the appropriate pages. For example, if you modify the investment scenario details for a project, they show up on the *Project Properties* page or the team pages depending on what was changed.

When changing the start date, if there are no actuals posted against tasks and assignments, then tasks and assignments are moved along with the investment start date. The investment finish date is adjusted by the same amount. Tasks and assignment are adjusted by the same amount. If actuals do exist, the investment start date can still be changed, but the actuals stay where they are. They are not moved.

If you expand a team member's start or finish dates beyond the investment's start or finish dates, then the investment start or finish dates are expanded. The effort assignment, if it exists, is also adjusted. If you contract a team member's start or finish date, the investment's start or finish dates are not adjusted. The effort assignment is adjusted.

Changing a team member's start or finish date never changes a task's (other than an effort task) start or finish date. If you move the investment's start date, all associated allocations also move.

To edit an investment's details in a capacity planning scenario

1. From a page that displays the Scenario toolbar, click More and select Investments.

A list of added investments display on the *Scenario: Investments* page.

2. Click the Edit Scenario Details icon that displays next to the investment.

The *Scenario Details* page appears.

3. Edit the following fields:

Start Date

The modified investment start date, if it exists in the scenario. The value entered here changes the start date of the investment (only in this scenario). A new scenario investment finish date is computed by maintaining the investment duration over workdays following the new start date.

Planned Cost and Planned Benefit

The planned values are reflected in portfolio scenarios and on the *Investment Budget* page.

Note: See the *Portfolio Management User Guide* for more information.

Approved

Select to change the status of the investment to "Approved" in the scenario. Deselect to change the status to "Unapproved."

Exclude

Select to exclude this investment from calculations completely. The investment no longer appears on scenarios or the plan of record but it still shows up on the investment-specific pages.

Priority

Enter a value (0 through 36) for the priority of the investment in the scenario, where 0 is highest and 36 is lowest.

4. Click Submit.

Your changes are saved.

Reset Investments in Capacity Planning Scenarios

While in a capacity planning scenario, you can select investments and refresh the values to reflect the contents of the plan of record. In this way you can undo the changes to an investment made in a scenario (without exiting the scenario).

Resetting deletes any changes that were made in the scenario (for that investment) and refreshes it with data from the plan of record. When re-added to the scenario, the investment includes scenario data, but this scenario data is the same as plan of record data until a change is made.

To reset an investment in a capacity planning scenario

1. From a page that displays the Scenario toolbar, click More and select Investments.

The *Scenario: Investments* page appears.

2. Select the investments that you want to reset, and then click Reset.

The investment is removed from the capacity planning scenario and re-added.

Manage Capacity Planning Scenarios

The pages for managing a scenario are common to both capacity planning and portfolio management. The scenarios you created for portfolio management are visible on any page that supports capacity planning scenarios. Capacity planning scenarios are not visible on portfolio management pages.

Use the *Capacity Planning Scenarios* page to create, edit, delete, copy, or set a scenario as the current scenario or the current compare scenario. From the Scenario toolbar, click More and select Manage Scenarios. This page displays scenarios for which you have Scenario - View rights.

You must have either the *Portfolio - View - All* global access right or an instance access right for the specific scenario, such as *Scenario - View* or *Scenario - Edit*. With these access rights, the scenario is displayed in the Scenario pull down on scenario-enabled pages.

Rename Capacity Planning Scenarios

To rename a capacity planning scenario

1. On the *Capacity Planning Scenarios* page, click a scenario name.
The *Scenario: Properties* page appears.
2. Enter a new name in the Scenario Name field, and click Save.
Your changes are saved.

Create and Link Capacity Planning Scenarios to Portfolios

You can link a scenario to a portfolio to make it accessible from the portfolio.

To create a new capacity planning scenario and link it to a portfolio

1. From a page that displays the Scenario toolbar, click More and select Manage Scenarios.
The *Capacity Planning Scenarios* page appears.
2. Click New.
The *Scenario: Properties* page appears.
3. Complete the following fields:

Scenario Name

Enter a scenario name.

Portfolio

Choose the portfolio to which you want to link this scenario from the drop down. Only the portfolios to which you have access rights are available for selection. You can only link the capacity planning scenario to the portfolio before saving the scenario. Once you save the scenario, you cannot change this value.

4. Click Submit.

The new capacity planning scenario is created and is linked to the portfolio.

Copy Capacity Planning Scenarios

The list of scenarios available to copy is limited to scenarios to which you have view or edit rights. When you copy a scenario, associated investments are also copied to the new scenario.

Alternatively, you can use the Copy option from the More button on the Scenario toolbar.

To copy a capacity planning scenario

1. From a page that displays the Scenario toolbar, click More and select Manage Scenarios.

The *Capacity Planning Scenarios* page appears.

Select the check box next to the scenario you want to copy, click More and select Copy.

A copy of the selected scenario is added to the list and is named "Copy of <Scenario Name>". This copy is private.

2. Click the name of the scenario.

The *Scenario Properties* page appears.

3. Give the copied scenario a new and unique name, and click Submit.

Your changes are saved.

Delete Capacity Planning Scenarios

When you delete scenarios, the selected scenarios and the associated investment and team member what-ifs are also deleted. The investments and team members are deleted only from this scenario, not from any other scenario.

Alternatively, you can use the Delete option from the More button on the Scenario toolbar.

To delete a capacity planning scenario

1. From a page that displays the Scenario toolbar, click More and select Manage Scenarios.

The *Capacity Planning Scenarios* page appears.

2. Select the check box next to the capacity planning scenario you want to delete, click More and select Delete.

The *Delete Confirmation* page appears.

3. Click Yes to confirm the prompt.

The capacity planning scenario is deleted.

Set a Current Scenario

You can select a scenario as the context for all capacity planning scenario-enabled pages. You can do this by selecting a current scenario directly from the Scenario toolbar.

You can also set a scenario as current as follows

1. On the *Capacity Planning Scenarios* page, select the scenario that you want to set as the current scenario.
2. Click More and select Set Current.

This scenario is now set as the current capacity planning scenario. This scenario becomes the selected default in the Scenario drop-down on any scenario-enabled page.

Set a Compare Scenario

You can select a "compare to" scenario as the context for all capacity planning scenario-enabled pages. You can do this by selecting a current compare scenario directly from the Scenario toolbar.

You can also set a current compare scenario as follows:

1. On the *Capacity Planning Scenarios* page, select the scenario that you want to set as the current compare scenario.
2. Click More and select Set Compare.

This scenario is set as the current capacity planning "compare to" scenario. It becomes the selected default in the Compare To drop-down on any scenario-enabled page.

Reset to Plan of Record

You can deselect any scenarios (current and compare scenarios) to switch to the plan of record. On the *Capacity Planning Scenarios* page, click More and select Reset. This unselects the current scenarios and resets all scenario enabled pages to the plan of record.

View Role Capacity

From the Scenario toolbar, click More and select Go to Capacity Planning to access the *Resource Planning: Capacity* page. From this page, you can view available and allocated work by role across all the investments the role is assigned to. The page shows demand for filled and un-filled role allocations.

Note: See the *Resource Management User Guide* for more information.

Share Capacity Planning Scenarios with Other Resources

Use the *Scenario Access* pages to view resources who have rights to this capacity planning scenario and to give resources access to the scenarios you created. From the *Scenario: Properties* page or *Scenario: Investments* page, you can select one of the following from the content menu:

- Full Access View—View a list of all resource and their rights to this scenario.
- Resource—View resources with explicit rights to this scenario. You can also add resource and grant them rights to this scenario and remove their rights from this scenario.
- Group—View groups with explicit rights to this scenario. You can also add groups and grant them rights to this scenario and remove group rights from this scenario.

Chapter 10: Access Rights

This section contains the following topics:

[Portfolio Access Rights](#) (see page 181)

[Group-Level Portfolio Rights](#) (see page 183)

[Investment Access Rights](#) (see page 184)

[Group-Level Investment Rights](#) (see page 189)

Portfolio Access Rights

The following access rights are available to resources, groups, and OBS units to create, view, and edit a portfolio:

Portfolio - Access

Allows a resource access to the Portfolio Management pages. This access right includes the *Portfolio - Navigate* global access right.

Type: Global

Portfolio - Navigate

Allows a resource access to the Portfolio Management pages.

Type: Global

Portfolio - Create

Allows a resource to create portfolios. This access right includes the *Portfolio - Edit Access* access right.

Type: Global

Portfolio - Edit

Allows a resource to view, edit, and delete a portfolio, to change its layout, and to attach, modify, or delete a scenario to a portfolio. Resources with this access right will only see investments, scenarios, and portlets in the portfolio to which the resource has been granted access rights. This access right is dependent on the *Portfolio - Navigate* access right being granted.

Type: Instance

Portfolio - Edit - All

Allows a resource to view, edit, and delete all portfolios. The resource will only see investments, scenarios, and portlets in the portfolio to which the resource has been granted rights. This access right is dependent on the *Portfolio - Navigate* access right being granted.

Type: Global

Portfolio - Edit Access

Allows a resource to view, edit, and delete the access rights for those portfolios to which he has *Portfolio - View - All* access right. This access right is dependent on the *Portfolio - Navigate* access right being granted.

Type: Global

Portfolio - Edit Access - All

Allows a resource to view, edit, and delete the access rights for any portfolio to which he has *Portfolio - View - All* access right. This access right is dependent on the *Portfolio - Navigate* access right being granted.

Type: Global

PMO Accelerator Portfolio Manager

Resources that are added to this group can review, model, and approve project and investment portfolios.

Type: Global

Portfolio - View - All

Allows a resource to view all portfolios. The resource will only see investments in the portfolio that the resource has been granted rights to and the resource will only see scenarios and portlets that the resource has been granted rights to. This access right is dependent on the *Portfolio - Navigate* access right being granted.

Type: Global

Portfolio - View

Allows a resource to view a specific portfolio.

Type: Instance

Portfolio - Edit Access

Allows a resource to edit the access rights for a specific portfolio.

Type: Instance

Portfolio - Manager - Auto (Automatic)

Automatically granted to the resource that creates the investment, or to the resource assigned as manager. Allows the resource to view, edit, and delete the portfolios she creates as well as to view, edit, and delete the access rights for that portfolio. This access right is dependent on the *Portfolio - Navigate* access right being granted.

This access right is equivalent to the *Portfolio - Edit* access right, and includes the *Portfolio - Read*, *Portfolio - Edit*, *Portfolio - Delete*, and *Portfolio - Navigate* access rights.

If the portfolio's manager is reassigned, this access right is transferred to the new manager. The previous manager's access rights to this portfolio are revoked.

Type: Instance

Group-Level Portfolio Rights

Your CA Clarity PPM administrator can grant instance and global-level access rights at the group level, so that if you are a member of a group, you will receive whatever access rights the group has been given.

The following group access rights are provided to work with portfolios:

PMO Accelerator Portfolio Manager

Resources that are added to this group can review, model, and approve project and investment portfolios.

Type: Global

Portfolio - Access

Allows a resource access to the Portfolio Management pages. This access right includes the *Portfolio - Navigate* global access right.

Type: Global

Portfolio - Manager

Users in this group include portfolio managers. With this access right you can view, create, and edit portfolios. This access right includes the *Portfolio - Navigate*, *Portfolio - Create*, and *Portfolio - Edit All* global access rights.

Type: Global

Portfolio - User

Users in this group include portfolio users. With this access right you are limited to viewing portfolios. This access right includes the *Portfolio - Navigate* and *Portfolio - View All* global access rights.

Type: Global

Investment Access Rights

All investment types share the same access right naming conventions.

The access right names listed in the following tables are applicable to all investment types. For example, to navigate to the pages of the *Application* investment, you must have the *Application - Navigate* access right. To navigate to pages of the *Other Work* investment, you must have the *Other Work - Navigate* access right.

The following are the access rights that can be assigned to resources, groups, and OBS units to work on investments:

<Investment> - Approve

Allows a resource to approve a specific investment. This access right includes the *<Investment> - Edit* access right.

Type: Instance

<Investment> - Approve All

Allows a resource to approve any investment. This includes the same right as the *<Investment> - Edit All* access right.

Type: Global

<Investment> - Benefit Plan - Edit

Allows the user to edit the benefit plans for a specific instance of the selected investment type.

Type: Instance

<Investment> Benefit Plan - Edit All

Allows the user to edit all benefit plans for the specified investment type.

Type: Global

<Investment> - Benefit Plan - View

Allows the user to view the benefit plans for a specific instance of the selected investment type.

Type: Instance

<Investment> Benefit Plan - View All

Allows the user to view all benefit plans for the specified investment type.

Type: Global

<Investment> - Budget Plan - Approve

Allows the user to approve the budget plans for a specific instance of the selected investment type.

Type: Instance

<Investment> Budget Plan - Approve All

Allows the user to approve all budget plans for the specified investment type.

Type: Global

<Investment> - Budget Plan - Edit

Allows the user to edit the budget plans for a specific instance of the selected investment type.

Type: Instance

<Investment> Budget Plan - Edit All

Allows the user to edit all budget plans for the specified investment type.

Type: Global

<Investment> - Budget Plan - View

Allows a resource to view the budget plans for a specific instance of the selected investment type.

Type: Instance

<Investment> Budget Plan - View All

Allows the user to view all budget plans for the specified investment type.

Type: Global

<Investment> - Cost Plan - Edit

Allows the user to edit the cost plans for a specific instance of the selected investment type.

Type: Instance

<Investment> Cost Plan - Edit All

Allows the user to edit all cost plans for the specified investment type.

Type: Global

<Investment> - Cost Plan - View

Allows the user to view the cost plans for a specific instance of the selected investment type.

Type: Instance

<Investment> Cost Plan - View All

Allows the user to view all cost plans for the specified investment type.

Type: Global

<Investment> - Create

Allows a resource to create a new investment. This access right includes the <Investment> - *Navigate* access right.

A resource granted this access right becomes the investment manager. By default, the investment manager has implicit edit rights to the investment and can create processes.

Type: Global

<Investment> - Delete

Allows a resource to delete an investment.

Type: Global

<Investment> - Edit

Allows a resource to edit a specific investment. This access right includes the <Investment> - *View* access right and the ability to delete the investment, but does not include the <Investment> - *Navigate* access right. A resource can also have implicit <Investment> - *Edit* access rights as the investment creator to modify and or delete the investment.

Type: Instance

<Investment> - Edit - All

Allows a resource to modify the properties of or to delete all investments. A resource can also have implicit <Investment>- *Edit* access rights as the investment creator to modify and or delete the investment.

Type: Global

<Investment> - Edit Access

Allows a resource to view, edit, and delete access rights for an investment if the resource has view rights to the investment. This access right is dependent on the <Investment>- *Navigate* access right being granted.

Type: Global

<Investment> - Edit Access Rights

Allows a resource to view, edit, and delete access rights for a specific investment. This access right does not include the <Investment> - *Navigate* or <Investment> - *View* access rights. This access right is dependent on the <Investment> - *Navigate* access right being granted.

Type: Instance

<Investment> - Edit Access Rights - All

Allows a resource to view, edit, and delete access rights for any investment to which the resource has view rights. This access right is dependent on the <Investment> - *Navigate* access right being granted.

Type: Global

Investment - Edit Allocations

Allows a resource to edit the allocation rules and to view the recovery statements for all investments.

Type: Global

<Investment> - Edit Chargebacks Information All

Allows user to edit chargeback rules for all investment types.

Type: Global

<Investment> - Edit Financial

Allows the user to view financial properties for a specific instance of the selected investment type.

Type: Instance

<Investment> Edit Financial Information All

Allows the user to view all financial properties for the specified investment type.

Type: Global

<Investment> Financial Plan - Submit All for Approval

Allows the user to submit all financial plans for the specified investment type for approval.

Type: Global

<Investment> - Financial Plan - Submit for Approval

Allows the user to submit the financial plans for approval for a specific instance of the selected investment type.

Type: Instance

<Investment> - Financial Rollup - Add

Allows a resource to add investments to a specific investment's financial rollup.

Type: Instance

<Investment> - Manager - Automatic

This access right is automatically granted to the resource that creates the investment, or to the resource assigned as manager. This access rights allows the resource to view, edit, and delete the investments he creates as well as to view, edit, and delete the access rights for that investment. This access right is equivalent to the *<Investment> - Edit* access right.

If the manager is reassigned, this access right is transferred to the new manager. The previous manager's access rights to this investment are revoked.

Type: Global

<Investment> - Modify Baseline

Allows a resource to baseline a specific investment. This access right the right to view the investment's general properties and processes.

Type: Instance

<Investment> - Navigate

Allows a resource to navigate to investment pages. This includes the right to view the investment's link on the main menu and the investment's list page.

Type: Global

<Investment> - Parents - Add

Allows a resource to add parent investments to a specific investment.

Type: Instance

<Investment> - Parents - Edit

Allows a resource to edit parent investments for a specific investment.

Type: Instance

<Investment> - Read - All

Includes navigate access right.

Type: Global

Investment - Reverse All

Allows a resource to reverse selected charges across all investments.

Type: Global

<Investment> - Reverse Charges

Allows the user to reverse charges for a specific instance of the selected investment type.

Type: Instance

<Investment> Reverse Charges All

Allows the user to reverse charges for the specified investment type.

Type: Global

<Investment> - View

Allows a resource to view a specific investment. This access right does not include the *<Investment> - Navigate* access right. Only those investments the resource has access rights to view are displayed in the list. This includes the ability to view the investment's details.

Type: Instance

<Investment> - View All

Allows a resource to view all investments. With this access right, all investments are displayed for the resource in the list on the investment's list page.

Type: Global

Investment - View Allocations

Allows a resource to view the allocation rules and recovery statements for all investments.

Type: Global

<Investment> - View Chargebacks Information

Allows user to view chargeback rules for an investment.

Type: Instance

<Investment> - View Chargebacks Information - All

Allows a resource to access chargebacks for all investments.

Type: Global

<Investment> - View Financial

Allows the user to view the financial properties of a specific instance of the selected investment type.

Type: Instance

<Investment> View Financial Information All

Allows the user to view all financial properties for the specified investment type.

Type: Global

Group-Level Investment Rights

There are no prepackaged groups associated with applications, products, assets, and other work. You can create and populate your own groups with global or instance access rights to applications, products, assets, and other work.

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