OVERVIEW

TeamDynamix (TDx) will be used as the tool for capacity planning, leveraging projects, workspaces, and tickets based on the nature of your team’s work. There are two essential components to capacity planning:

Scheduling Resources
Scheduling resources allows for forecasting of resource needs. Resource managers are primarily responsible for resource scheduling, with project managers scheduling for project work (in collaboration with the team member and resource manager).

Capturing Actual Time
Tracking actual time spent vs scheduled time gives real-time and historical feedback on scheduling accuracy to allow for improvements in planning and scheduling.

ROLES AND RESPONSIBILITIES

Resource Managers
Each individual Resource belongs to a Resource Pool, and each Resource Pool is maintained by one or more Resource Managers (with one serving as primary). **Responsibility:** Preparing and executing a resource capacity plan and resource schedules. Allocating resources to projects, including assigning the appropriate personnel to job roles within a project.

*Note:* The individual each team member Reports To is responsible for timesheet approvals. Usually this is the same as the resource pool manager, but it can differ.

Project Managers:
Project Managers work in conjunction with Resource Managers when resources are needed for project work. **Responsibility:** Identify appropriate resources in collaboration with Resource Manager. Schedule assigned resources as appropriate for successful delivery of project objectives, communicating with resource managers on any substantive changes.

Resources / Team Members:
Resources are requested by the Project Manager and assigned to the project in discussion with the Resource Manager. Other resources are personnel within IT that may not be part of a project. **Responsibility:** Record actual time worked. Alert Project Manager and Resource Manager of any concerns about scheduling accuracy.
TIME TYPES

- **Administrative**: To include HR tasks, training, staff meetings and knowledge transfer activities.
- **Operational Work**: Includes day to day task time spent on activities required of your position, such as end user support, process improvements, scheduling/planning for resource requests.
  - **Note**: New implementations or functionality offerings are projects.
- **Project Work**: Project planning, task work, meetings, and other project-related activities.
- **Time Off**: Includes personal time, sick, curtailed, and holidays\(^1\). Do not record the reason for time off.

SCHEDULING PROCESS

**Responsibility**: Resource Manager, and Project Manager(s)

**Scheduling Overview**:

- Each resource is set up by the TDx Administrator with their average daily capacity (generally 8 hours).
- Resource schedules should be built out to the best possible degree of accuracy for a minimum of 3 months into the future (rolling 3 month period).
- Schedules are built:
  - in Projects and Workspaces. Workspaces are easier to manage, but not as specific.
  - by the Resource Manager to account for: Administrative, Operational, and Time Off.
  - by the Project Manager to account for: Project work.
- Schedules can be built in either projects or workspaces; recommendation:
  - Holidays are automatically accounted for in TDx by the Administrator (13 days annually)
  - Time Off: schedule in a Workspace, 10% time is the standard calculation
  - Administrative: schedule in a Workspace, 18% time is the standard calculation
  - Operational: schedule in a Workspace or Project per departmental needs and assigned tasks.
  - Project: schedule in a Project based on assigned tasks

- Resource scheduling is a best effort activity – as we learn more we will improve but it will be an inexact science.

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\(^1\) *Holiday time needs to be recorded by the team member, but TeamDynamix will automatically subtract holiday time from schedules, therefore it does not need to be scheduled.*
RECOMMENDATION FOR WORKSPACES AND ASSOCIATED TIME TYPES

Responsibility: Resource Manager

Please note the below Time Types. In addition to project time, generally the following time types are required.

1) **Workspace name:** *ET&S (team name) Administrative
   - **Time Type:** Administrative
   - **Schedule:** Add all team members and build out schedule using 18% of time

2) **Workspace name:** *ET&S (team name) Non-Working Time
   - **Time Type:** Time Off
   - **Schedule:** Add all team members and build out schedule using 10% of time (to account for sick and vacation days, note that TDx automatically accounts for holidays)

3) **Workspace name:** *ET&S (team name) Operational Activities
   - **Time Type:** Operational Work
   - **Schedule:** Add all team members and build out schedule according to assigned tasks

Notes: Putting an * in the front of the workspace name bundles all the workspaces together in your team’s project/workspaces list. Not mandatory, but recommended.

Workspace schedules are typically completed for a year at a time, and then can be adjusted as needed.

RECOMMENDATION FOR PROJECTS AND SETTINGS

Responsibility: Project Manager, and Resource Manager

Project Types

NEW: ET&S will now use only two Project Types. The former department-based project types will be removed June 2023.

1. **ET&S Projects** – used for a temporary endeavor undertaken to create a unique product, service or result with defined scope, resources, and schedule
   - Default time type: Project Work

2. **ET&S Operational Activities** – used for on-going, lights-on activities generally conducted within a single department. Does not produce a new capability, service, or product but often maintains service continuity.
   - Default time type: Operational Work

There is an element of discretion in deciding if, for example, an endeavor such as a software upgrade is a project or an operational activity. Managers are encouraged to refer to the definitions and use their judgement.
Recommended Project Settings to Facilitate Capacity Planning Best Practices

- **Resource Management setting:** *Manage by Project* is the default, and is the recommended project setting. This is consistent with prior practice. This setting enables the resource manager to have more control over scheduling time for resources.

- **Resource Schedule Editing:** This control will default to *Allow resource pool managers to request schedule changes but require project managers to approve edits* and is the recommended setting.

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Resource Management
- Manage By Project
- Manage By Plan

Expense Forecasting
- Expenses can be planned on a per year basis.
- Expenses can be planned on a monthly basis.

Resource Schedule Editing
- Allow resource pool managers to edit schedules.
- Allow resource pool managers to request schedule changes but require project managers to approve edits.
- Do not allow resource pool managers to edit schedules.
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**Project Resource Scheduling**

- Every resource pool has now been provided with at least one **phantom resource placeholder**. This resource placeholder has 0 hours of capacity and can be utilized to track upcoming work requiring team capacity. This allows for those efforts to be tracked until named resources can be assigned.
  - i.e. (abbreviated team name)_Phantom Placeholder
  - Some teams may have two or three if requested to represent different skillsets
- The project manager adds a Phantom Placeholder or a named resource to their project after discussion with the Resource Manager.
- The project manager sets and maintains a schedule for each resource on the project. The schedule should be updated at least monthly.

This icon represents information which should be reviewed and updated on projects in TeamDynamix which are already in flight and will continue beyond July 1, 2023.
ACTUAL TIME RECORDING

Responsibility: Resource/Team Member; Resource Manager for approvals

Please ensure that your team members know to regularly close their work days or work week by entering their time in TeamDynamix.

Team Member Time Recording

- Time can be entered in the MyWork application or the Time and Expenses application.
- Recording time on a daily basis allows for quick and accurate time entry. Time must be entered at least weekly.
- Time can be entered in bulk across the week. For instance, if you were on vacation last week you can simply record 40 hours on a single day of that week – you don’t need to enter 8 hours per day in that case.
- Once the actual hours for the week are recorded, the Team Member selects Submit Final to send to the person they Report To for approval.

Time Approval

- Report To individual (usually the Resource Manager) receives notification of a submitted time card, navigates to My Work > My Approvals to approve timecards.

HOW TO MONITOR THE CAPACITY PLANNING PROCESS

Resource Managers will want to ensure that resource time is entered and complete, for both scheduled time and actual time worked for each resource.

There are several reports to assist in monitoring. The Time Status Report (in the Finance application of TeamDynamix) is particularly useful to quickly see that your team members are submitting time. If you sort by Resource Pool and date range you can see a simple list showing status of the time report for each person.

Additional reports are available in TeamDynamix; see the reference manual for further information.

GOVERNANCE FOR CAPACITY PLANNING

As the process is established for FY24 (beginning July 1st), there will be at least a quarterly review of this information with leadership, as well as periodic checkpoints to ensure the process is functioning as needed for capacity planning purposes. Scheduled and actual hours must be complete to be useful and reliable for capacity planning.
ADDITIONAL INFORMATION

- Projects and Workspaces
- Capacity Planning (including information on the TDx Windows Capacity Planner which can be used for schedule modeling.)
- USNH TDx Knowledge Base
- TDx Support Request