

Rough Cut Capacity

Objective:

- Manage a resource
 - Identify sales needs - identify when Sales can sell and schedule an install
 - Understand availability of implementation windows/install dates
 - Will use Estimated Hours to understand capacity
 - Estimated Hours will tie to Customer Quotes
 - Non Billable hours
 - Entered in Estimated Hours
 - Tagged as non billable (only when the project has no contract)
 - Estimated should tie to quote for their projects
 - Hours should be placed in the timeframe they expect to complete
 - They should have all their planned hours in for this week by Tuesday
 - They should consistently have all planned hours for the following week in by Friday
 - All estimated hours for a project should be entered in best guess of when it should happen by week
- Plan the event horizon
- See capacity
- Sales visibility
- Utilization planning

1. On the Menu Panel, click on **Help Desk**.
2. Click on **Rough Cut Capacity** under Reports.

Resource	Ticket	Customer	8-27-2018 to 9-2-2018	9-3-2018 to 9-9-2018	9-10-2018 to 9-16-2018	9-17-2018 to 9-23-2018	9-24-2018 to 9-30-2018	10-1-2018 to 10-7-2018
			Estimated	Planned	Booked	Estimated	Planned	Booked
Darel Ronquillo	HD76134731	Test_Customer_41	5.00	0.00	5.00			
Show Totals:			5.00	0.00	5.00			

- a. Grid is initially grouped by the Resource (agent assigned to the ticket)
 - b. There will be 12 weeks bucket in the grid, starting from the Plan Date.
 - c. Estimated = Quoted Milestone Hours during the reporting period (Ticket screen > Time Tracking tab > Estimated Hours column OR Time Entry Screen > Estimated Hours column).
 - d. Planned = total hours of activities in the ticket during the reporting period (Ticket screen > Activities tab > Event).
 - e. Booked = number of hours worked during the reporting period (Ticket screen > Time Tracking tab > Hours column).
3. To filter by Resource, input parameter then click enter. User can also add filter criteria.
 4. User can add new hours worked to a ticket, click the Ticket drill down. This will load the the Hours Worked tab in the Ticket screen.
 5. User can also open customer screen by clicking the Customer drill down.