



# ACP SETUP CHECKLIST

Updated 10/21/21

Please review the training links below for Adjustable Capacity Planning

Resources	Link
Overview Training	<a href="#">Adjustable Capacity Planning Overview</a>
Manager Training	<a href="#">Adjustable Capacity Planning for Managers</a>
CSR Training	<a href="#">Adjustable Capacity Planning for CSRs</a>
Pantheon Recording	<a href="#">Enhance Your Job Booking Processes with Adjustable Capacity Planning</a>

Complete	ACP Checklist
<input type="checkbox"/>	<b>Schedule &gt; Technician Shifts-</b> Setup <a href="#">Technician Shifts</a> and make sure to update. <i>#1 reason capacity numbers don't look correct, &amp; cases are opened with support.</i>
<input type="checkbox"/>	<b>Settings &gt; Technicians-</b> Assign all technicians to a Business Unit who need to have capacity. <i>#2 reason cases are opened with support.</i>
<input type="checkbox"/>	If these techs work in multiple Business Units then put the BUs into <a href="#">Business Unit Groups</a> to make capacity cover all techs with BUs listed.
<input type="checkbox"/>	<b>Settings &gt; Business Unit Groups &gt; Base Capacity.</b> (Default is 0) Recommended to keep at 0 until you see an opportunity to Overbook/ Underbook on every single arrival window within the BU Group. <i>(Cannot use if you have the skills option on, see next step)</i>
<input type="checkbox"/>	<b>Settings &gt;Capacity Configuration- Capacity View Options.</b> Highly recommended to enable <i>custom arrival windows</i> , but not required. (See CSM to setup) If custom arrival window settings are on, then you MUST choose that option in this menu. <b>Capacity Enhancement-</b> Default On- <i>Manual Adjustments</i> or you can switch it to <a href="#">Skills</a> which would match job type skills to technicians skills in availability & stop manual adjustments from being an option. (You can do one or the other)
<input type="checkbox"/>	<b>Availability Threshold-</b> Time between two jobs below the threshold will be thrown out of capacity availability. Recommend 30-59min depending on city traffic times. With the toggle <b>"Apply availability threshold within arrival window boundaries"</b> ON arrival window boundaries will also be used to compute time thrown out. So if time after a job- before the end of an arrival window- is smaller than the Availability Threshold, then that time will also be thrown out. <i>Default OFF</i>
<input type="checkbox"/>	<b>"Don't include non-managed technicians in capacity calculations"</b> toggle should be ON if you have any unmanaged techs that shouldn't be alone on jobs.
<input type="checkbox"/>	<b>Settings &gt;Employees- Permission:</b> <i>Edit Business Hours And Capacity Planning</i> and <i>Manually Adjust Capacity</i> allow employees to be able to edit ACP settings and the <i>manager</i> capacity planning board. Few need access.
<input type="checkbox"/>	<b>Settings &gt; Job Types-</b> Make sure job durations are accurate numbers so that capacity calculations are realistic to your estimated time off completion