

# Time Periods Settings

You can manage the Time Periods in Allocate > **TIME PERIODS SETTINGS**.

Below is a sample of a scenario with Time Periods.

Time Periods allows you to have one or more sets of alternatives that will span one or more periods.

The screenshot shows the 'ALLOCATE' tab in the software. At the top, there are navigation tabs: MANAGE MODELS, DEFINE MODEL, COLLECT INPUT, SYNTHESIZE, ALLOCATE, and REPORTS. Below these are various settings: Scenario: Time periods (Roa), Period format: Years, Period step: 1, Start year: 2017, Use discount factor: 0.00001 (checked), and buttons for Expand Projects, Contract Projects, and Trim Timeline. The main area is a table with columns for ID, Projects, Cost, Earliest Copy Paste, Latest Copy Paste, Duration Copy Paste, Must for specific Periods, and time periods 2017 (1), 2018 (2), 2019 (3), and 2020 (+). The table lists 16 projects with their respective costs and time period configurations.

ID	Projects	Cost	Earliest Copy Paste	Latest Copy Paste	Duration Copy Paste	Must for specific Periods	2017 (1)	2018 (2)	2019 (3)	2020 (+)
1	01. Cloud Migration (Vendor selected in separate model)	990.00	1	2	2	<input type="checkbox"/>				
2	02. Cisco Routers	500.00	1	3	1	<input type="checkbox"/>				
3	03. Desktop Replacements	800.00	1	3	1	<input type="checkbox"/>				
4	04. EMC VMAX Enterprise Storage	4,220.00	1	3	1	<input type="checkbox"/>				
5	05. Firewall and Antivirus Licenses	120.00	1	3	1	<input type="checkbox"/>				
6	06. Iron Mountain Cloud Backup Service	430.00	1	3	1	<input type="checkbox"/>				
7	07. Laptop Replacements	1,340.00	1	3	1	<input type="checkbox"/>				
8	08. Mobile Workforce Smartphone App	230.00	1	3	1	<input type="checkbox"/>				
9	09. Oracle 12 Upgrade	1,890.00	1	3	1	<input type="checkbox"/>				
10	10. PeopleSoft Upgrade	1,670.00	1	3	1	<input type="checkbox"/>				
11	11. Salesforce.com Corporate Portal	1,345.00	1	1	3	<input type="checkbox"/>				
12	12. Building access system upgrade	2,300.00	1	3	1	<input type="checkbox"/>				
13	13. Sales Force Laptops	150.00	1	3	1	<input type="checkbox"/>				
14	14. SRDF Site/Service	3,440.00	1	3	1	<input type="checkbox"/>				
15	15. Multi factor authentication	2,100.00	1	3	1	<input type="checkbox"/>				
16	16a. Customer Service Call Center - Gold	980.00	1	2	2	<input type="checkbox"/>				

You can specify Time Periods for each scenario. You can select a scenario from the scenario drop-down:

Scenario:

To illustrate how to add Time Periods, below is a scenario without Time Periods:

This screenshot shows the same software interface but with the 'Start year' set to 2020. The table below shows that the 'Earliest Copy Paste', 'Latest Copy Paste', and 'Duration Copy Paste' columns are empty for all projects, indicating that no time periods have been defined for this scenario.

ID	Projects	Cost	Earliest Copy Paste	Latest Copy Paste	Duration Copy Paste	Must for specific Periods	2020 (+)
1	01. Cloud Migration (Vendor selected in separate model)	990.00				<input type="checkbox"/>	
2	02. Cisco Routers	500.00				<input type="checkbox"/>	
3	03. Desktop Replacements	800.00				<input type="checkbox"/>	
4	04. EMC VMAX Enterprise Storage	4,220.00				<input type="checkbox"/>	
5	05. Firewall and Antivirus Licenses	120.00				<input type="checkbox"/>	
6	06. Iron Mountain Cloud Backup Service	430.00				<input type="checkbox"/>	
7	07. Laptop Replacements	1,340.00				<input type="checkbox"/>	
8	08. Mobile Workforce Smartphone App	230.00				<input type="checkbox"/>	
9	09. Oracle 12 Upgrade	1,890.00				<input type="checkbox"/>	
10	10. PeopleSoft Upgrade	1,670.00				<input type="checkbox"/>	
11	11. Salesforce.com Corporate Portal	1,345.00				<input type="checkbox"/>	
12	12. Building access system upgrade	2,300.00				<input type="checkbox"/>	
13	13. Sales Force Laptops	150.00				<input type="checkbox"/>	
14	14. SRDF Site/Service	3,440.00				<input type="checkbox"/>	
15	15. Multi factor authentication	2,100.00				<input type="checkbox"/>	
16	16a. Customer Service Call Center - Gold	980.00				<input type="checkbox"/>	

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By default, the period format is in Years, which you can change from the drop-down below:

Period format:

Days  
 Weeks  
 Months  
 Quarters  
**Years**  
 Period

The period step is 1 by default and can be changed:

The period step is the interval of the periods. For example, when set to 1, the period years will be 2020, 2021... and then when set to 5 will be 2020, 2025, 2030...

Period step:

Click the start year and select from the drop-down:

Start year:

2020 ▼

By default, the selected is the current year.

You can select to use the discount factor. The default discount factor is 0.00001, which you can change as desired.

Use discount factor:

To add a period simply click the plus button:

2020  
 +

The period name is based on the format you selected - in this case, the year 2020 (current year).

After clicking the plus button, the blue bars will be displayed as shown below. Another column (2021) will then be displayed and is ready to be added:

ID	Projects	Cost ▼	Earliest Copy Paste	Latest Copy Paste	Duration Copy Paste	Must for specific Periods	2020 (1)	2021
1	01. Cloud Migration (Vendor selected in separate model)	990.00	1	1	1	<input type="checkbox"/>	-	+
2	02. Cisco Routers	500.00	1	1	1	<input type="checkbox"/>	2020	
3	03. Desktop Replacements	800.00	1	1	1	<input type="checkbox"/>	2020	
4	04. EMC VMAX Enterprise Storage	4,220.00	1	1	1	<input type="checkbox"/>	2020	
5	05. Firewall and Antivirus Licenses	120.00	1	1	1	<input type="checkbox"/>	2020	
6	06. Iron Mountain Cloud Backup Service	430.00	1	1	1	<input type="checkbox"/>	2020	
7	07. Laptop Replacements	1,340.00	1	1	1	<input type="checkbox"/>	2020	
8	08. Mobile Workforce Smartphone App	230.00	1	1	1	<input type="checkbox"/>	2020	
9	09. Oracle 12 Upgrade	1,890.00	1	1	1	<input type="checkbox"/>	2020	
10	10. PeopleSoft Upgrade	1,670.00	1	1	1	<input type="checkbox"/>	2020	

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Here we added four periods (2020-2023):

ID	Projects	Cost	Earliest Copy Paste	Latest Copy Paste	Duration Copy Paste	Must for specific Periods	2020 (1)	2021 (2)	2022 (3)	2023 (4)	2024
1	01. Cloud Migration (Vendor selected in separate model)	990.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	
2	02. Cisco Routers	500.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	
3	03. Desktop Replacements	800.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	
4	04. EMC VMAX Enterprise Storage	4,220.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	
5	05. Firewall and Antivirus Licenses	120.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	
6	06. Iron Mountain Cloud Backup Service	430.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	
7	07. Laptop Replacements	1,340.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	
8	08. Mobile Workforce Smartphone App	230.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	
9	09. Oracle 12 Upgrade	1,890.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	
10	10. PeopleSoft Upgrade	1,670.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	

You can drag the blue bars to adjust the periods.

For example, click the small handle at the right of the blue bar, and then drag the handle until it extends to the desired column:

ID	Projects	Cost	Earliest Copy Paste	Latest Copy Paste	Duration Copy Paste	Must for specific Periods	2020 (1)	2021 (2)	2022 (3)	2023 (4)	2024
1	01. Cloud Migration (Vendor selected in separate model)	990.00	1	1	1	<input type="checkbox"/>		2021	2022	2023	

From above, **1. Cloud Migration (Vendor selected in separate model)** can start on any period from 2020 to 2023.

To specify the duration, extend the inner blue bar:

ID	Projects	Cost	Earliest Copy Paste	Latest Copy Paste	Duration Copy Paste	Must for specific Periods	2020 (1)	2021 (2)	2022 (3)	2023 (4)	2024
1	01. Cloud Migration (Vendor selected in separate model)	990.00	1	4	1	<input type="checkbox"/>		2021	2022	2023	

From above, we specified that the alternative can span by two periods from 2020-2023.

You can also specify the earliest/latest period to fund the alternative by grabbing and dragging the |||. Below, the alternative **02. Cisco Routers** can be funded from the year 2021 to 2023.

ID	Projects	Cost	Earliest Copy Paste	Latest Copy Paste	Duration Copy Paste	Must for specific Periods	2020 (1)	2021 (2)	2022 (3)	2023 (4)	2024
1	01. Cloud Migration (Vendor selected in separate model)	990.00	1	3	2	<input type="checkbox"/>		2021	2022	2023	
2	02. Cisco Routers	500.00	1	3	1	<input type="checkbox"/>		2021	2022	2023	

The **Earliest**, **Latest**, and **Duration** are displayed in the corresponding columns.

You can also enter from the Earliest, Latest, and Duration columns to adjust the Time Periods instead of dragging the blue bars.

**Earliest** is the earliest period the alternative can start.

**Latest** is the latest period the alternative can start.

**Duration** is the span the resource can be distributed.

You can also copy/paste the Earliest, Latest, and Duration columns. When pasting to the Earliest column, keep in mind the following:

1. Earliest > 0

- 2. Earliest <= Latest
- 3. Earliest + Duration < Total Periods

We recommend pasting values to the **Latest** column first, before pasting to the Earliest column. This is to make sure that the Earliest will be less than or equal to the Latest.

Click **Expand Projects** to expand the blue outline up to the latest period.

Click **Contract Projects** to contract the blue outline.

Click **Trim Timeline** to delete unused periods.

You can delete periods individually using the minus (-) button.

You can check Must for certain Periods to force the funding on certain periods.

You can specify a resource **must** be funded on a specific period(s) by checking the "Must for certain Periods" option. The solid bar will switch to dark blue:

ID	Projects	Cost	Earliest Copy Paste	Latest Copy Paste	Duration Copy Paste	Must for specific Periods	2020 (1)	2021 (2)	2022 (3)	2023 (4)	2024
1	01. Cloud Migration (Vendor selected in separate model)	990.00	1	3	2	<input type="checkbox"/>	[Timeline bar with 2022-2023 highlighted in dark blue]				

You can then drag the "must" bar to the period you want to be a Must. Above, we made that **1. Cloud Migration (Vendor selected in separate model)** must be funded in the years 2022-2023.

You can also specify dependencies on the Time Periods -- for example, you want to specify that alternative A must start only after B is finished (Non-concurrent), or Alternative A may start on the same period or later than alternative B (Concurrent). This can be done in Resource Allocation > Dependencies page.