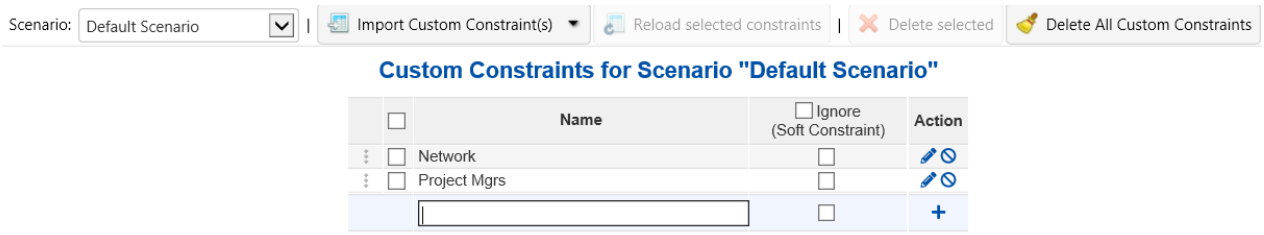
Custom Constraints

Add, Edit, Delete Custom Constraints

You can add, edit, or delete custom constraints from Allocate > Portfolio Management **CUSTOM CONSTRAINTS** page.



To add new Custom Constraints, simply type the Custom Constraint Name in the text box provided and then click the **+** button.

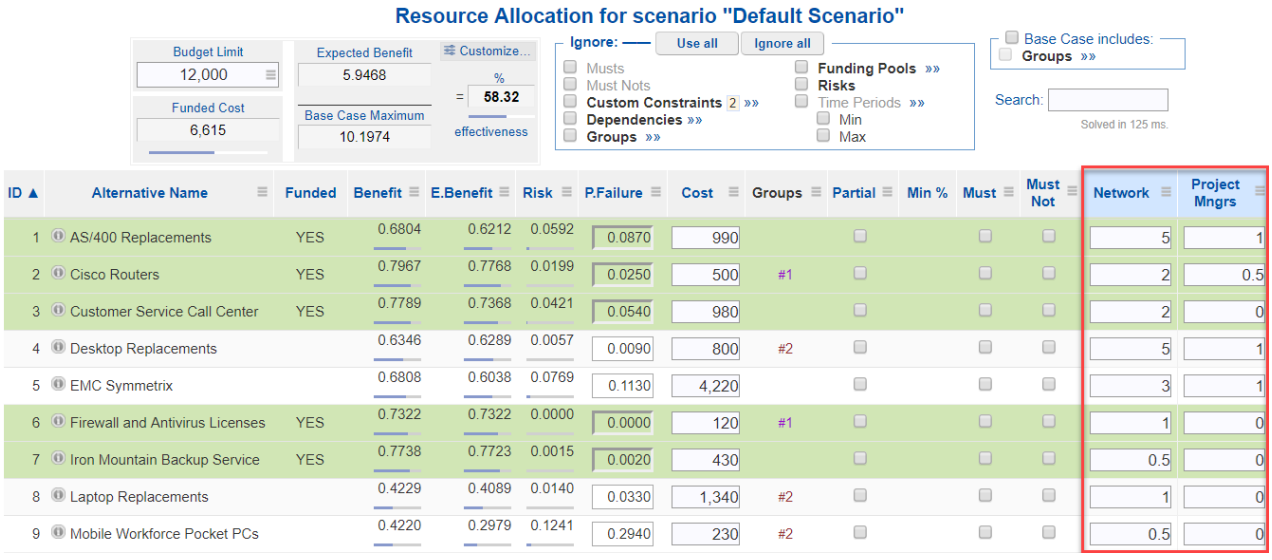
To edit the Custom Constraint name, click the icon.

To delete a Custom Constraint, click the icon.

You can also delete one or multiple custom constraints by checking the checkboxes to the left of the custom constraints you want to delete and then clicking the Delete selected button.

You can clear all the Custom Constraints by clicking the Delete All Custom Constraints .

Custom constraints added are displayed as columns in the Portfolio View Grid. Below are the Network and Project Managers custom constraints.



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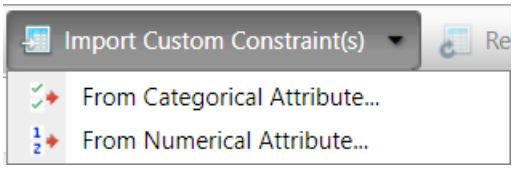
Import Custom Constraints

You can import custom constraints from:

- Categorical Alternative Attributes - establish strategic buckets for use use in "Balance and Coverage" analysis and to for use as a constraint
- Numerical Alternative Attributes - useful as constraints and for analysis

Navigate to Allocate > Custom Constraints, then click the Import Custom Constraints button:



From Categorical Alternative Attributes (Strategic Buckets)

You can view and manage alternative attributes from the Alternatives or Strategic Buckets pages.

For example, from the Strategic Buckets page below we see an attribute named "Time frame" with Short, Medium, and Long term category items:

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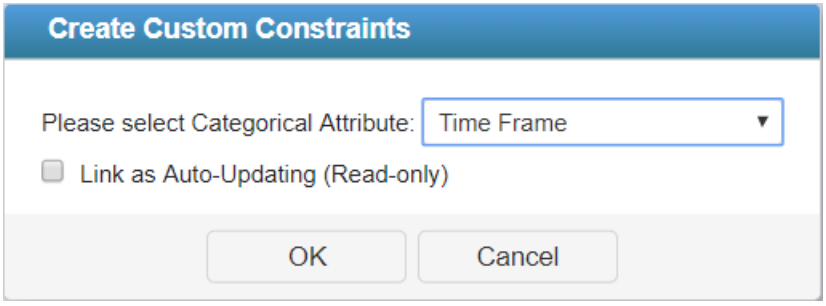
Strategic Buckets for Model "Sample IT Portfolio Optimization"
("Default Scenario")

Search:

No ▲	Alternative	Funded	Total	Costs	Time Frame
1	AS/400 Replacements	Yes	0.527	990	Long
2	Cisco Routers	Yes	0.618	500	Medium
3	Customer Service Call Center	Yes	0.604	980	Long
4	Desktop Replacements		0.492	800	Medium
5	EMC Symmetrix		0.528	4,220	Medium
6	Firewall and Antivirus Licenses	Yes	0.568	120	Short
7	Iron Mountain Backup Service	Yes	0.600	430	Medium
8	Laptop Replacements		0.328	1,340	Medium
9	Mobile Workforce Pocket PCs		0.327	230	Medium
10	Oracle 9i Upgrade		0.577	1,890	Short
11	PeopleSoft Upgrade		0.453	1,670	Short
12	Plumtree Corporate Portal	Yes	0.775	1,345	Medium
13	ProServe System Upgrade		0.554	2,300	Short
14	Sales Force Laptops	Yes	0.531	150	Medium
15	SRDF Site/Service		0.453	3,440	Long
16	Thin Client Implementation	Yes	0.713	2,100	Long

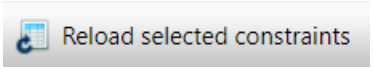
To import the Time Frame attribute as a custom constraint, select Import Custom Constraints > From Categorical Attribute...



You can link any custom constraint that came from an Alternative Attribute to its source attribute as "Auto-Updating" (Read-Only).

When this option is checked, any updates to the attribute will automatically update the constraint. The constraints in the Allocate Main grid will be disabled for editing (Read-only).

When "Auto-Updating" is unchecked, when you want to update or reload the constraints, use the



button. This button is also available in the Allocate Main Grid.

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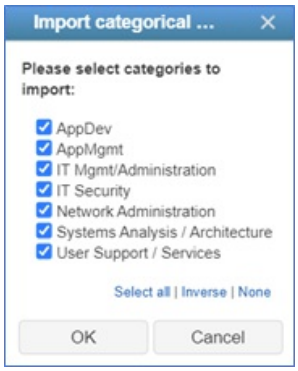
	Name	Ignore (Soft Constraint)	Action
	Network		
	Project Mngrs		
	Long		
	Medium		
	Short		
			+

Custom constraints that are linked to an alternative attribute have a blue chain icon when auto-updating is checked, and a gray chain icon when auto-updating is unchecked. You can click the icon to toggle on and off.

When creating custom constraints created from a categorical alternative attribute, all attribute categories are selected by default. You can create a separate custom constraint for each categorical alternative or, by deselecting some categories, a sub-set of the attribute categories. In the image below, all the categories of the Sponsor attribute are selected and a separate constraint will be created for each category.

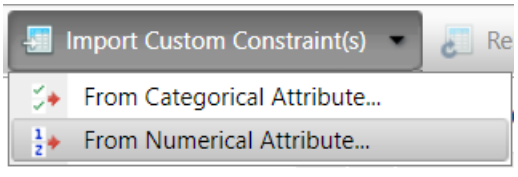


In the image below, the Long, Medium, and Short constraints belong to the Alternative Attribute named "Timeframe." When a project has a particular alternative attribute, a "1" will be placed in the appropriate column. The primary purposes of this is to get a count and to allow for balance and coverage constraints (the totals and constraint rows are not shown in the image below). For example, you can constrain the portfolio to fund a minimum of 3 projects for each of Long, Medium, or Short timeframe.

ID ▲	Alternative Name	Funded	Benefit	E.Benefit	Risk	P.Failure	Cost	Groups	Partial	Min %	Must	Must Not	Network	Project Mngrs	Long	Medium	Short
1	AS/400 Replacements	YES	0.6804	0.6212	0.0592	0.0870	990						5	1	1		
2	Cisco Routers	YES	0.7967	0.7768	0.0199	0.0250	500	#1					2	0.5		1	
3	Customer Service Call Center	YES	0.7789	0.7368	0.0421	0.0540	980						2	0	1		
4	Desktop Replacements		0.6346	0.6289	0.0057	0.0090	800	#2					5	1		1	
5	EMC Symmetrix		0.6808	0.6038	0.0769	0.1130	4,220						3	1		1	

From Numerical Alternative Attributes

Navigate to Allocate > Custom Constraints, then click the Import Custom Constraints button and select From Numerical Attribute:



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Then select the desired custom constraint to import.

Soft Custom Constraints

Soft Constraints have the following properties:

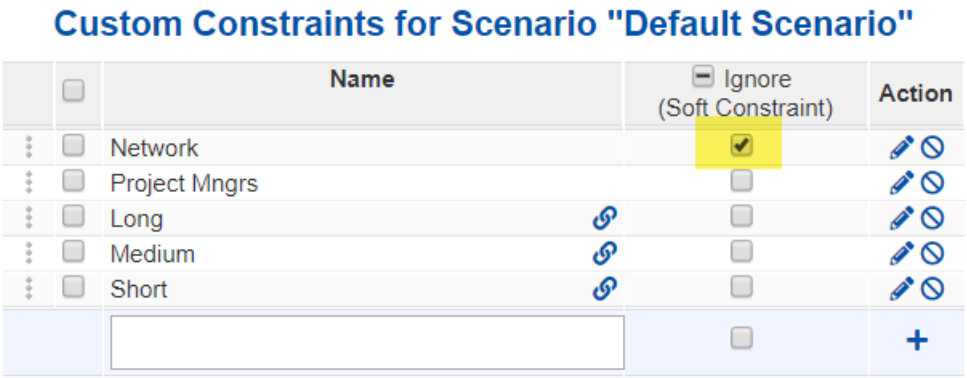
- As a type of Custom Constraint, Soft Constraints are always numeric.

- Soft Custom Constraints are ignored by the Solver in arriving at optimal funding solutions.

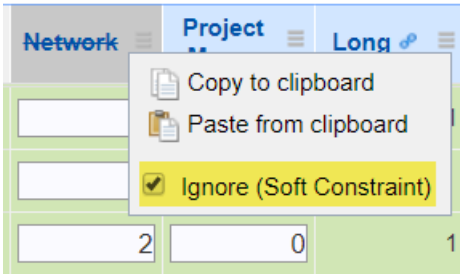
- Soft Custom Constraint column headers are displayed with a light grey background and a strike-through font.

- Soft Custom Constraints can be used to calculate surplus or shortage by entering a number in the “Max” row and selecting the “Calculate Soft Constraints” setting.

To designate a Custom Constraint as a Soft Constraint, check the Ignore check box for the Custom Constraint(s) you want to ignore.



For example, to ignore the custom constraint "Network" from the Allocate Main, click the ≡ of the constraint you want to ignore and then check the Ignore check box. To un-ignore a constraint, uncheck the Ignore checkbox.



The Soft Constraint "Network" will be ignored in the Resource Allocation. Totals, overages, or shortages are available in the footer rows of the grid.

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