Mercury™ IT Governance Center

Managing Your Resources (Resource Management)

Version 5.5.0

MERCURY INTERACTIVE

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Chapter 1 Introduction

Mercury ITG Center provides an array of tools for managing personnel related to IT initiatives. Organizational modeling capabilities keep track of where Resources are located and who they report to. Skill modeling capabilities unlock the potential of Resources. As Resources are assigned to Tasks and Requests, executives and managers have full visibility into the capacity of their teams and the load placed on them, in terms of both current operational use and capacity planning for the future.

- To support current Demand and Project planning, the Resource Management delivers a set of visualizations and related tools that managers and individual Resources can use to communicate each others' needs and capabilities. These include work calendars, standard planning fields on Tasks and Requests, and Resource load and capacity histograms.
- To support future Demand and Project planning, Resource forecasting capability is achieved with Staffing Profiles and Resource Pools. High-level visualizations help Program and Resource managers with assessing Project feasibility and timing, and with making advance staffing decisions and allocations.

About This Document

This guide describes how to navigate and use the Mercury ITG Center's Resource Management functionality. This includes the following activities:

- Modeling your Organizations
- Setting up Resources and Calendars
- Using Staffing Profiles and Resource Pools for capacity planning

- Visualizing Resource load and capacity across the system for operational planning

Each chapter covers a specific topic on navigation or usage:

Key Concepts	Defines key concepts and terms relating to Resource Management.
Before Starting	Describes the setup work that should be completed before using Resource Management.
Modeling Your Organization	Explains how to model your organization at the individual and group level using Resource Management.
Using Resource Management for Capacity Planning	Describes how to use Resource Management entities such as Resource Pools and Staffing Profiles to model and plan for Resource allocations.
Using Resource Management for Operational Planning	Explains how to use Resource Management visualizations to assess current Resource usage and optimize operational capacity.

Intended Audience

The intended audience for this document include:

- Business or technical users who configure and maintain Resources or an Organization model using Resource Management
- Business users responsible for creating and managing Projects or Requests using Mercury ITG Center
- Business users responsible for forecasting capacity and Resource allocations to Projects and Programs
- Managers responsible for reporting on Projects or Demand

Document Conventions

Table 1-1 lists the types of conventions used in this document.

Table 1-1. Document conventions

Convention	Description	Example
Button, menu, tabs	Names of interface components that can be clicked (such as buttons, menus, and tabs) are shown in bold.	**Apply** button
Fields, Windows, Pages	Names of windows, fields, and pages are shown as displayed.	New Request window

`Code`	Code input and output are shown as displayed.	`CauchoConfigFile`
		`C:/`*`ITG_Home`*`/conf/`
		`resin.conf`

Link	Linked URLs, filenames, and cross references are shown as blue italicized text.	*www.merc-int.com*
Variable	Variables are shown as italicized text.	*ITG_Home*/bin directory
Note	Used to identify note boxes that contain additional information.	Note
Caution	Used to identify caution boxes that contain important information. Follow the instructions in all caution boxes, failure to do so may result in loss of data.	Caution
Example	Used to identify example boxes that contain examples of related procedure.	Example

Additional Resources

Mercury Interactive provides the following additional resources to help you successfully use Mercury ITG Center:

- *Related Documentation*

- *Customer Support*
- *Education Services*

Related Documentation

The Library includes additional documents related to the topics discussed in this guide. Access the Library through the Mercury ITG Center online help.

Using the Dashboard	This document provides details for defining and configuring the Dashboard and custom Portlets.
Processing Requests (Demand Management)	This document explains how to process Requests using Demand Management.
Processing Packages (Change Management)	This document explains how to process Packages using Change Management.
Managing Your Projects (Project Management)	This document explains how to work with Projects using Project Management.
Security Model Guide and Reference	This document presents an overview of the data security model and provides instructions for controlling access to different entities.
Configuring the Dashboard	This document provides instructions for configuring custom Portlets, maintaining standard and custom Portlets, and setting a Default Dashboard for all users.
Configuring Time Management	This document provides administrative information and processes for Time Management.
Tracking Your Time (Time Management)	This document provides instructions for using Time Management.

Customer Support

Customer support and downloads for Mercury ITG Center and additional product information can be accessed from the Mercury Interactive Support Web site at *http://support.mercuryinteractive.com*.

Education Services

Mercury Interactive provides a complete training curriculum to help you achieve optimal results using Mercury IT Governance Center. For more information, visit the Education Services Web site at *http://www.merc-training.com/main/ITG*.

Chapter

2

Key Concepts

This chapter defines the common concepts and terms used in the Mercury ITG Center's Resource Management functionality. An understanding of these concepts and terms is necessary when using Resource Management.

This chapter covers the following topics:

- *Resource*
- *Resource Pool*
- *Staffing Profile*
- *Organization Unit*
- *Skill*
- *Work Item*
- *Assignment (Booking)*
- *Load Balancing*
- *Calendar*
- *Non-Workload Items*

Resource

A Resource is a Mercury ITG Center user who performs work tracked by Resource Management. Resources can include employees, contractors, managers, or any other category your organization may need. Resources have the following key attributes:

- Skill — A Skill is an ability or area of knowledge tracked by Resource Management. See *"Skill"* on page 13 for more detailed information on Resource Skills.
- Cost Rate — This rate is the hourly cost associated with a Resource or Skill. This rate often represents the charge-back or billed cost of their labor.
- Workload Capacity — This is a percentage that indicates what portion of a full working day is available for a Resource for planned workload items, on average.

Example

For instance, a particular DBA may reserve 20% of her time for routine maintenance activities that are not tracked by Resource Management. The Workload Capacity available for work tracked by Resource Management therefore set to 80%.

When a Resource is set as the Resource for a Task or the Assigned To user on a Request, that Resource is booked for the Task or Request. *Figure 2-1* shows the View Resource page for a Resource, which includes a two-week capacity projection and Gantt chart of Resource assignments.

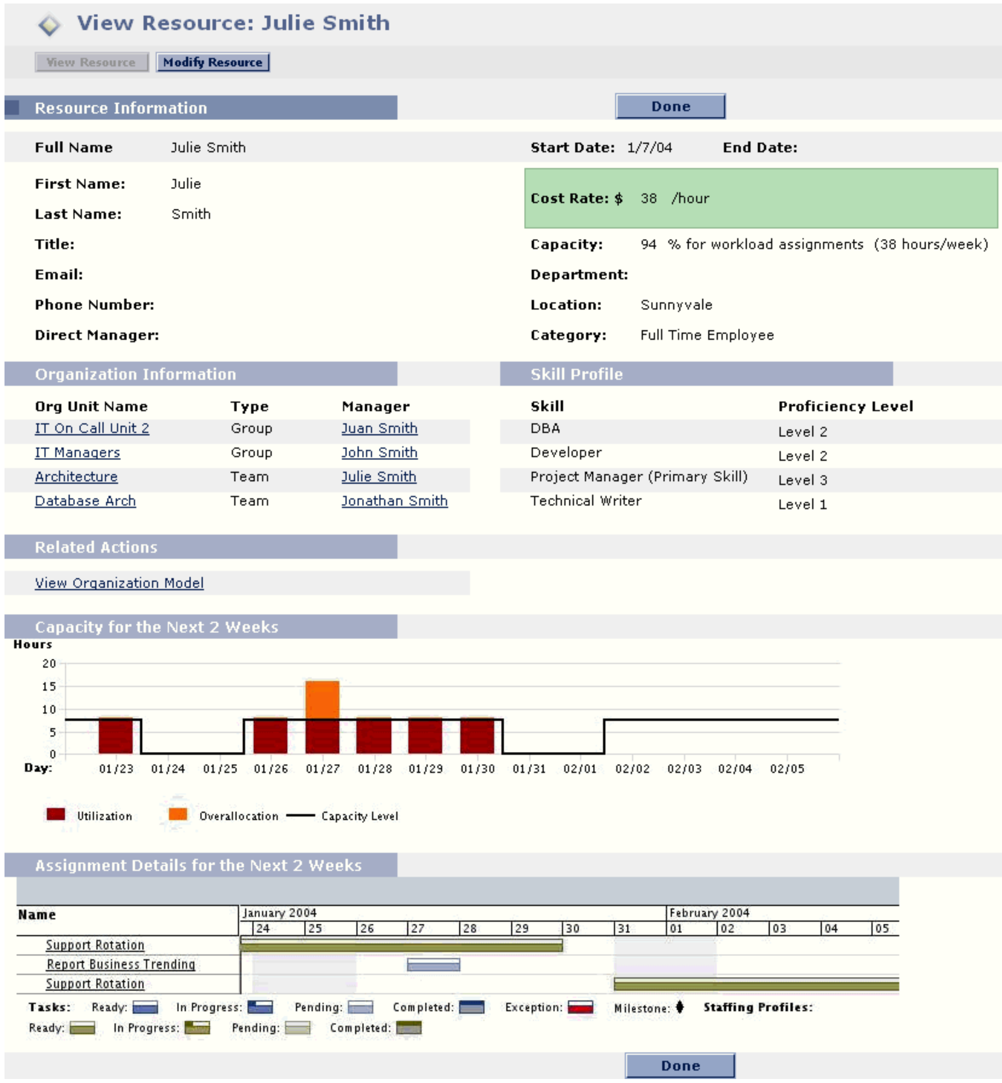


Figure 2-1 Resource with Cost information, Capacity graph, and Gantt chart with assignment details

Resource Pool

A Resource Pool defines a group of Resources, organized by skill or Resource name, from which Staffing Profiles may draw for their staffing needs. Each line in a Resource Pool presents the planned capacity, within the Pool, for some skill or Resource (by name) over a range of fiscal months. Resource Pools provide a way for managers to plan the forecast workload capacity of a group of Resources. *Figure 2-2* shows a Resource Pool.

Note

The level of budgeting within each fiscal month is expressed as the number of “Full Time Equivalents,” or the equivalent number of full-time Resources.

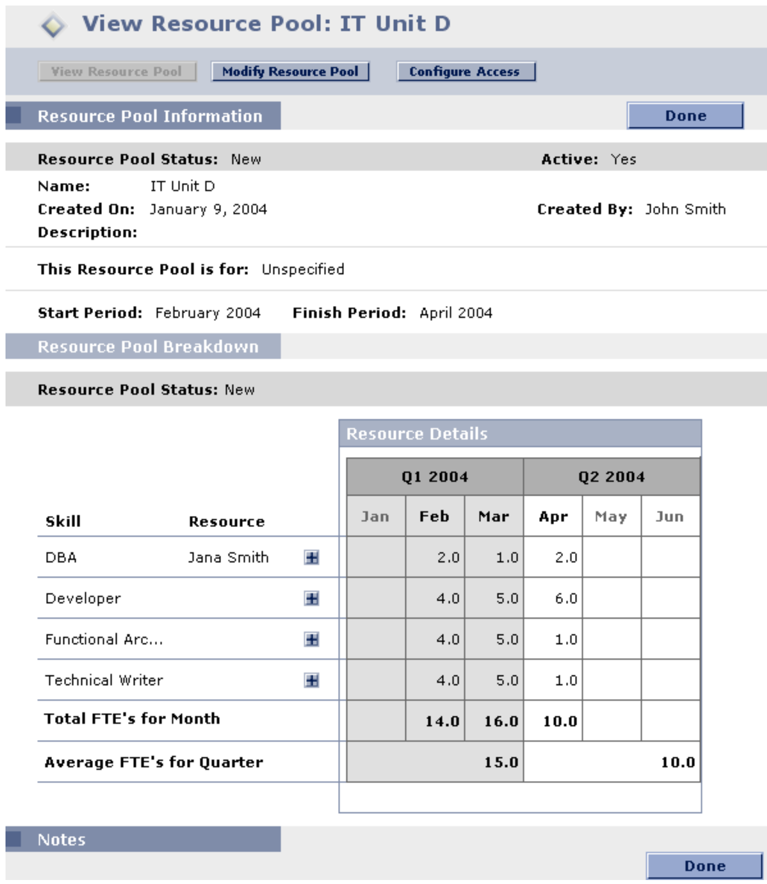


Figure 2-2 Resource Pool

Staffing Profile

A Staffing Profile specifies an allocation of Resources between specified start and finish dates. Between these dates, the Staffing Profile specifies the skill and Resources allocated for each period. Each line in a Staffing Profile indicates an allocation of one or more Resources in some or all time periods. The line can designate a skill or a specific Resource in the system. A Staffing Profile is shown in *Figure 2-3*.

Note

> The level of budgeting within each fiscal month is expressed as the number of “Full Time Equivalents,” or the equivalent number of full-time Resources.

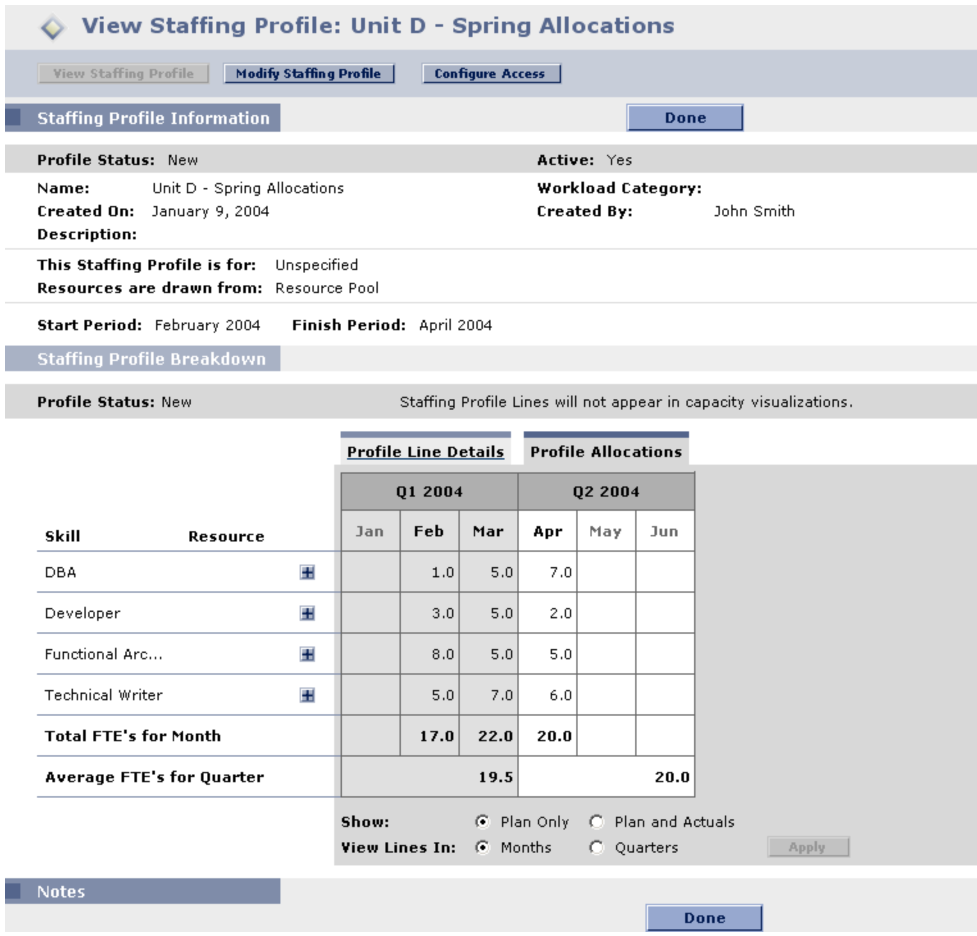


Figure 2-3 Staffing Profile

Organization Unit

Organization Units make up the building blocks of an organization model, which is a representation in Resource Management of the relevant reporting structures and associations within an organization. In Resource Management, a single Organization Unit can be made up of any relevant collection of Resources, such as a single team and its manager. An Organization Unit could also be made up of a smaller group of people inside a department and their team leader; use the Category field to differentiate between different types of Organization Units. *Figure 2-4* depicts an Organization Unit with three members.

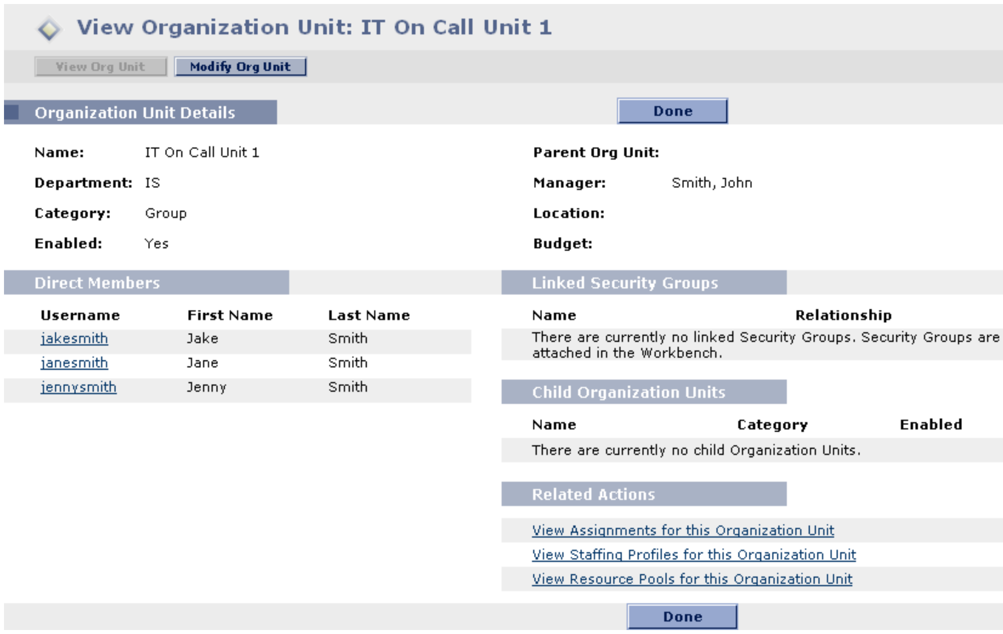


Figure 2-4 Organization Unit

Organization Units can be arranged into a hierarchy that makes up the organization model. A typical hierarchy structure might involve several Department Organization Units with child Organization Units. *Figure 2-5* shows the View Organization Model page.

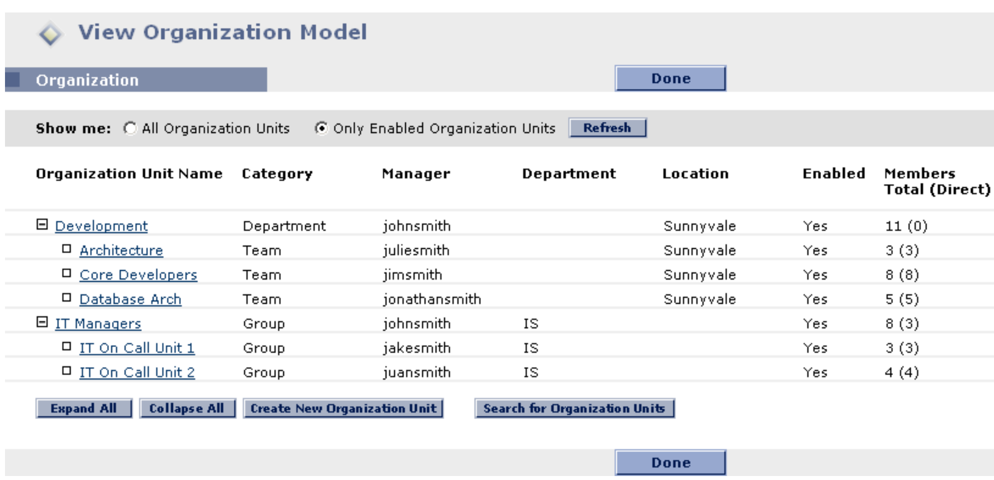


Figure 2-5 Organization Model

Organization Units can also be linked to Security Groups. The Organization Unit can define the Security Group's membership, distributing the responsibility for maintaining the Security Group from Mercury ITG Administrators to qualified business users. *Figure 2-6* illustrates a Security Group whose members are determined by an Organization Unit.

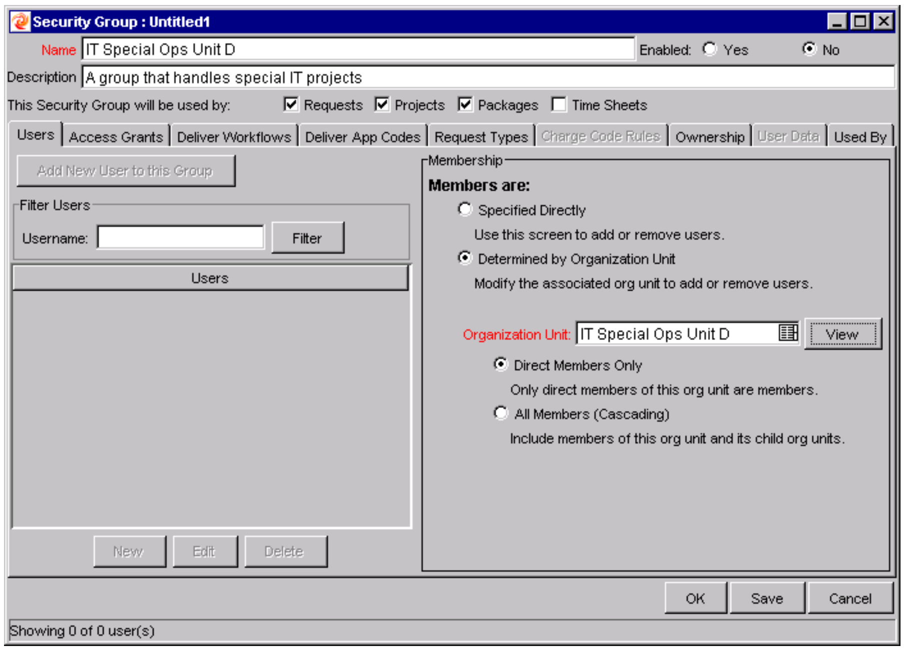


Figure 2-6 Security Group with members determined by an Organization Unit

An Organization Unit can define the members in a Security Group in the following ways:

- **Direct Members Only** — Only the direct members of the Organization Unit are members of the Security Group.
- **All Members (Cascading)** — The direct members of the Organization Unit as well as the members of its child Organization Units (if any) are members of the Security Group.

Skill

A Skill is an ability or area of knowledge tracked by Resource Management. *Figure 2-7* shows the View Skill page for a "Technical Writer" Skill.

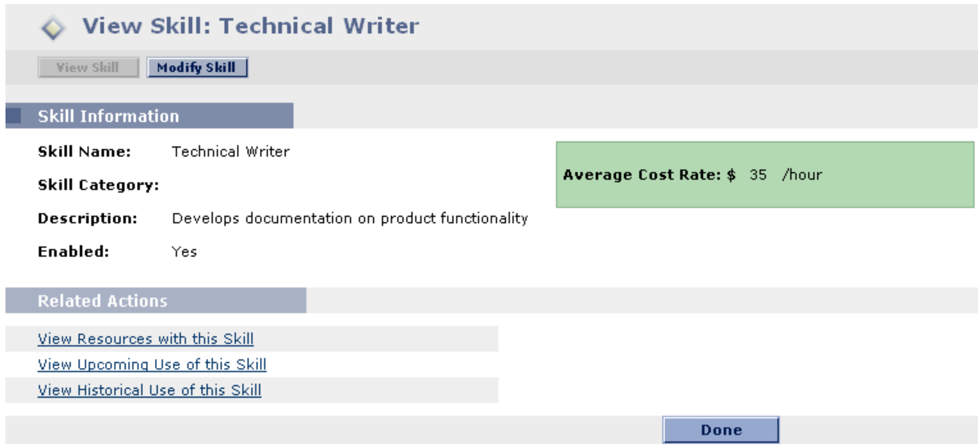


Figure 2-7 Skill

Skills are associated with Resources. A single Resource can have multiple Skills of various proficiency levels. Once multiple Skills have been assigned, a Primary Skill for each Resource must be designated. A Skill Profile for a Resource with multiple Skills is shown in *Figure 2-8*.

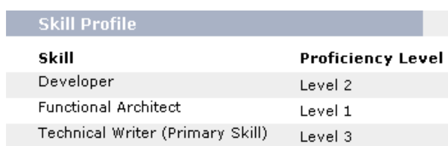


Figure 2-8 Skill Profile for a Resource with multiple Skills

When a Resource is assigned, or booked, for a Task or Request, their Primary Skill is associated with the booking by default. *Figure 2-9* depicts a Task assigned to a Resource with his Primary Skill booked.

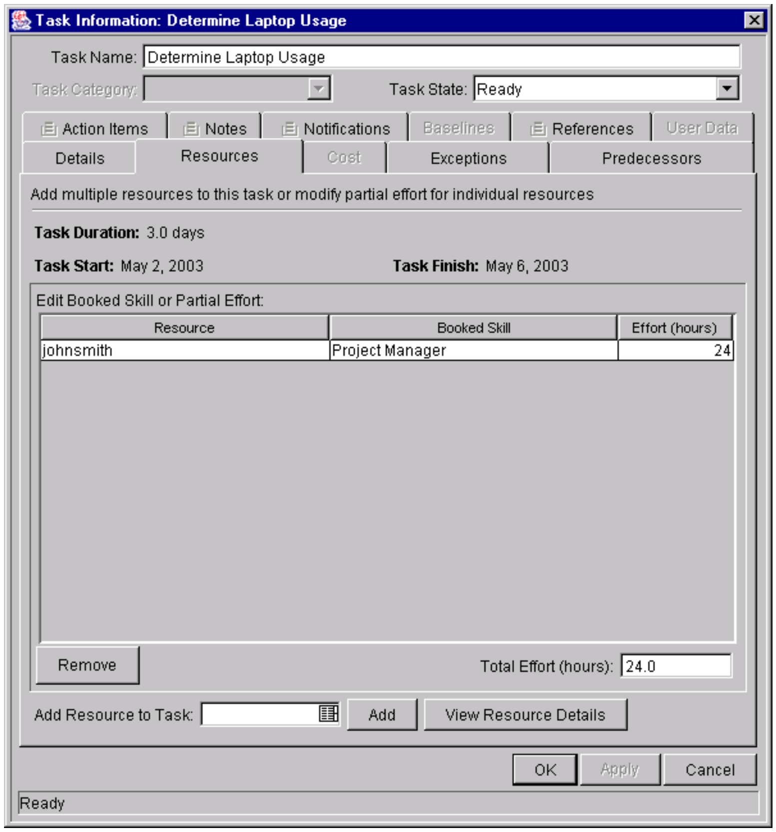


Figure 2-9 Task Information window showing Resource booked for Primary Skill

Skills are also used to create a *Staffing Profile* or *Resource Pool*.

Work Item

A Work Item is a unit of work that can be planned, estimated, and tracked to collect actuals as a Resource completes it. In Resource Management, a Work Item can be a Request or a Task.

Work Items have the following attributes:

- Scheduled start date
- Scheduled finish date
- Scheduled duration
- Scheduled effort

- Assigned Resources
  - Task Work Items can be booked to one or more Resources.
  - Request Work Items can be assigned only to a single Resource.
- Scheduled effort for each assigned Resource
  - Defaults based on the scheduled duration (for each Resource).
  - The sum of all assigned Resources' scheduled efforts on a Task Work Item will be the total scheduled effort for the Work Item.
- Skill used by each assigned Resource (Defaults to Primary Skill of each Resource)
  - If the Resource has no Primary Skill specified, the Skill defaults to "unspecified"
- Percent complete
  - Automatically updated by the Workflow for Requests
  - Manually maintained on Tasks
- Actual start date
- Actual finish date
- Actual duration
- Actual effort

Assignment (Booking)

Assigning or booking a Request or Task to a Resource automatically assigns or books the Work Item for that Resource. There is no need to separately book the Work Item in a different interface. Similarly, when the scheduled dates, assignment, or other booking information are altered or cleared, the booking information is also automatically updated or cleared.

Assigning or booking a Resource for a Work Item automatically books the Resource's Primary Skill, if one is specified.

Load Balancing

A common task for Project managers and demand managers is to assign Work Items to Resources in a balanced way, so that assignments do not exceed individuals' working capacity. A Project manager assigns tasks to project team members and needs to ensure that the plan does not place excessive load on any Resource. A demand manager who is responsible for a flow of Requests will assign these Requests to team members, and similarly needs to ensure that no team member is overloaded. This task of balancing the assignments of all Resources is commonly referred to as load balancing.

Resource Management provides key visualizations of assignments that help managers to discover when Resources are overallocated, and when they aren't being efficiently allocated, giving them better control and visibility over their Resources' workload. *Figure 2-10* shows the Analyze Assignment Load page, which can be used to determine areas of under- or over-allocation.

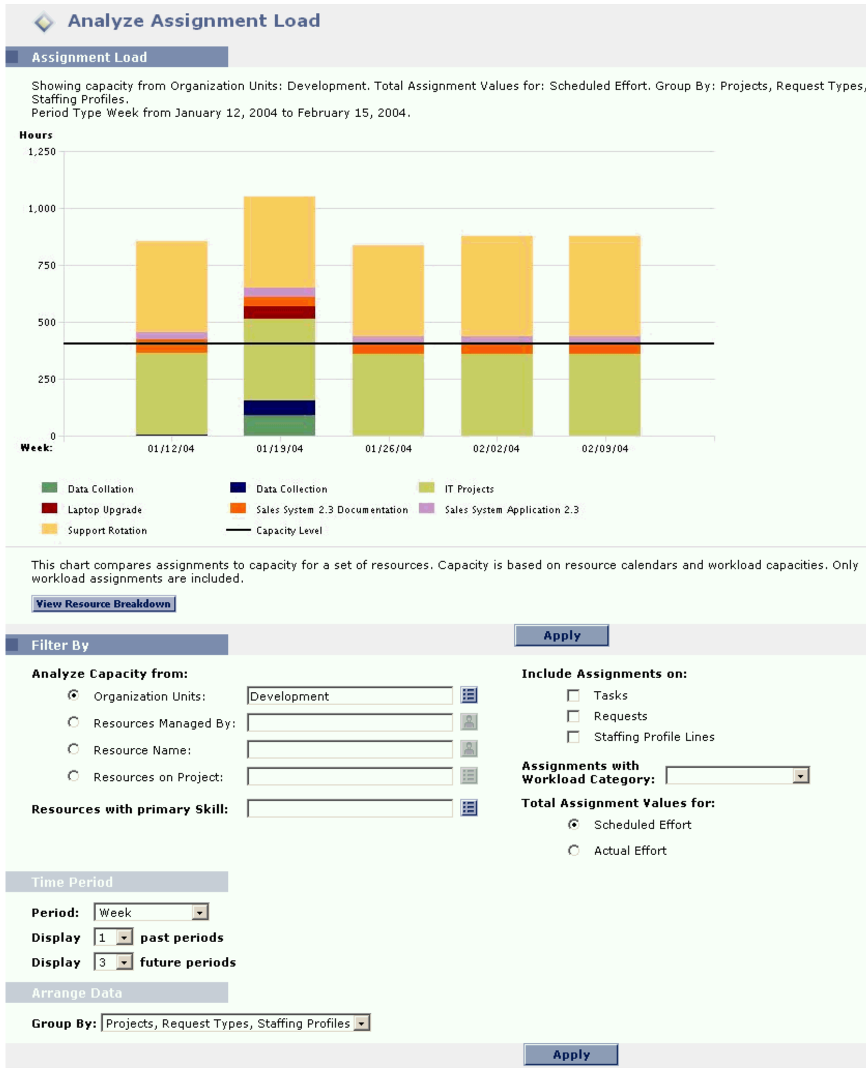


Figure 2-10 Analyze Assignment Load page

Calendar

Resource Management can make use of one or both of the following calendar types when planning Resource assignments and load visualization:

- *Base Calendar*
- *Resource Calendar*

Base Calendar

The Base Calendar is the default calendar used by Resource Management. It specifies working and non-working days for your entire business. Non-working days can be specified and are not counted when calculating load and capacity for all Resources in the system.

Resource Calendar

Each Resource can have their own calendar, which specifies their own specific working and non-working days, such as sick time or a pre-planned vacation. Once specified in a Resource's calendar, non-working days are not counted when calculating load and capacity for that Resource.

Non-Workload Items

Resource Management may not be used to track all of the work that a Resource does. For instance, a Resource in an IT department answers questions, handles trouble ticket escalations, and attends team meetings in addition to completing assigned tasks in projects. To account for these activities, Resource Management uses a Resource Workload Capacity setting that indicates what portion of the Resource's time is available for planned workload items. See *"Resource"* on page 7 for more detailed discussion of Workload Capacity.

Chapter 3 Before Starting

This chapter discusses a number of settings that should be configured prior to using Resource Management.

The following topics are discussed:

- *Setting Up Resource Management Validations*
- *Setting Up Skills*
- *Setting Up the Base Calendar*
- *Setting Up Request Work Item Fields*

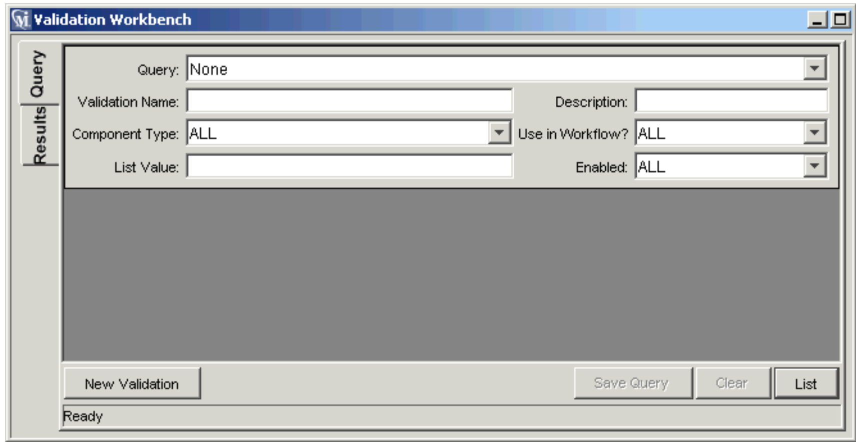
Setting Up Resource Management Validations

Resource Management employs several Validations that should be configured prior to using it.

To modify the values for these field Validations:

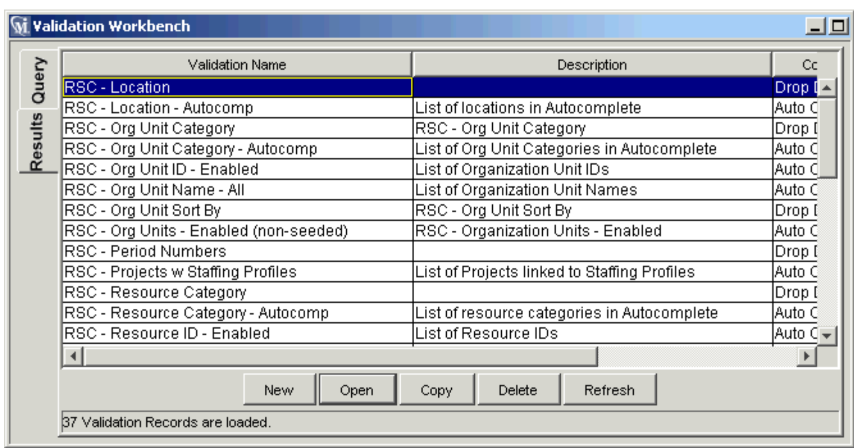
1. Log onto Mercury IT Governance Center.
2. Select **Administration > Open Workbench** to launch the Workbench interface.
3. Click the **Configuration** screen group and click the Validations screen.

   The Validation Workbench window opens.



4. Enter “rsc” into the Validation Name field and click **List**.

   The **Results** tab opens with all of the system Resource Management Validations listed.



5. Modify the following Validations to conform to your business model:

Validation	Description
RSC - Resource Category	All Resources have an optional Category field that can be used to assist Resource searches. Seeded values are provided for this Validation.
RSC - Location	All Resources have an optional Location field that can be used to assist Resource searches. Seeded values are not provided for this Validation.

Validation	Description
RSC - Org Unit Category	All Organization Units have an optional Category field that can be used to assist Organization Unit searches. Seeded values are not provided for this Validation.
RSC - Skill Category	All Skills have an optional Category field that can be used to assist Skill searches. Seeded values are not provided for this Validation.
RSC - Workload Category	All Work Items have an optional Workload Category field that can be used to divide Work Items into major reporting categories for analysis purposes. Seeded values are provided, but may not match your company's terminology.

6. Add, modify, or delete values for these Validations as you see fit.

   See the Validations chapter in Configuring a Request Resolution System or Configuring a Deployment System (Change Management) for more details on modifying values for list Validations.

Setting Up Skills

Resource Management comes with a single "Unspecified" Skill, which all Resources have in the absence of any defined Skills. To make use of Resource Skill tracking, you need to add new Skills and modify them as you see fit.

Note

> Only users with the Resource Management Edit All Skills Access Grant can add or modify Skills.

The following sections discuss setting up Skills in more detail:

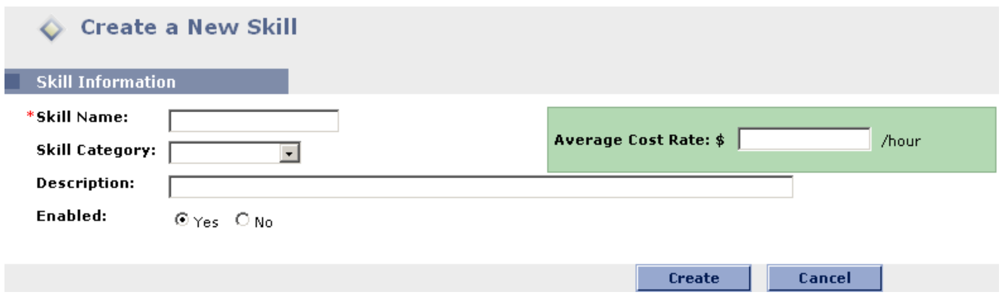
- *Creating a New Skill*
- *Modifying Existing Skills*
- *Deleting Skills*

Creating a New Skill

To add a new Skill:

1. Log onto the Mercury ITG Center.
2. Select **Create > Skill** or **Resource > Skills > Create a Skill** from the menu bar.

   The Create a New Skill page opens.



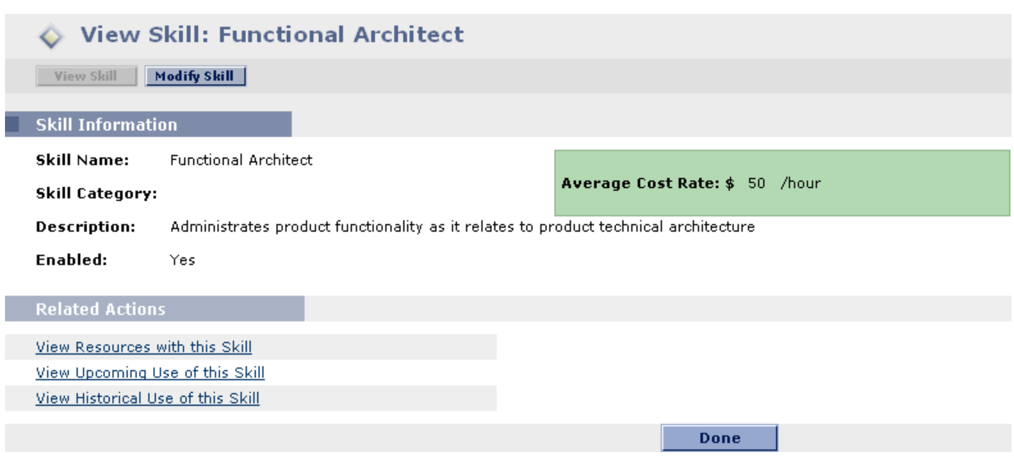
3. Enter a Skill Name and any optional fields you see fit.

Note

Depending on your level of Cost data access, you may not be able to see or edit the Average Cost Rate field. See Security Model Guide and Reference for details.

4. Click **Create**.

   The Skill is created and the View Skill page opens.



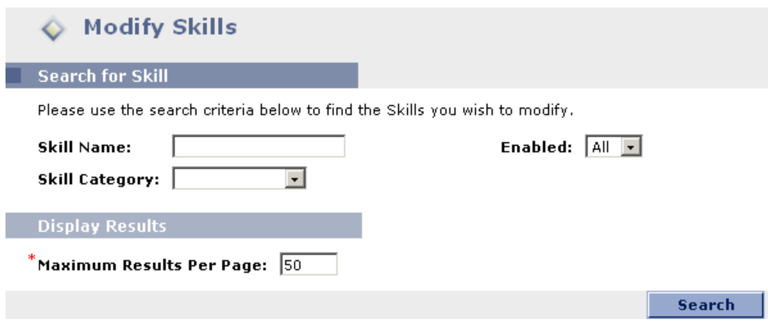
You can now add this Skill to any Resource.

Modifying Existing Skills

To modify an existing Skill:

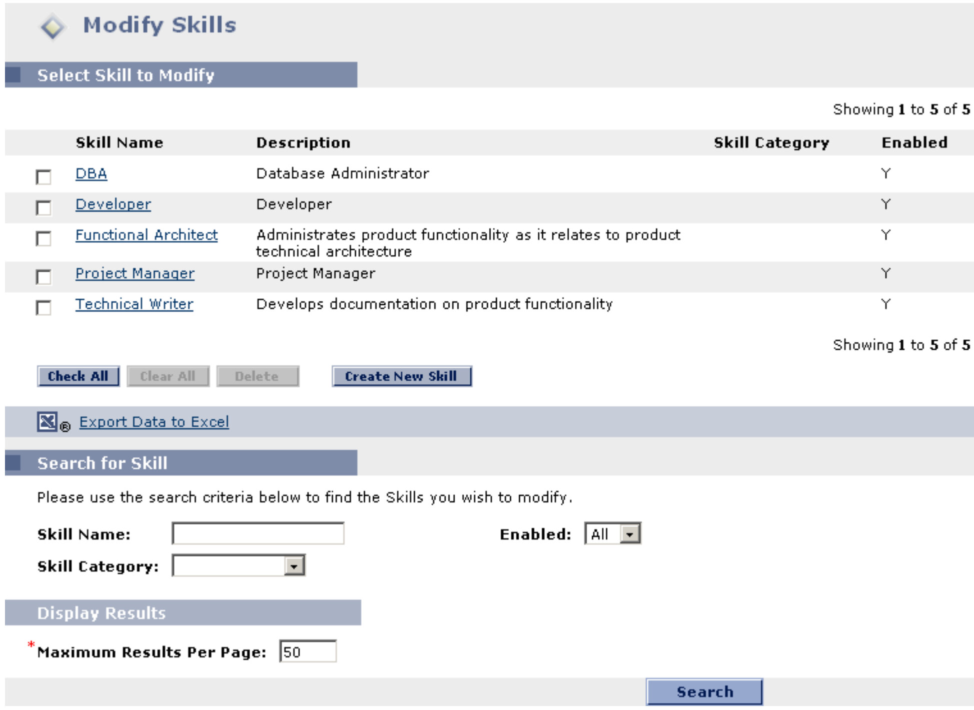
1. Log onto Mercury ITG Center.
2. Select **Resource > Skills > Modify a Skill** from the menu bar.

   The Modify Skills search page opens.

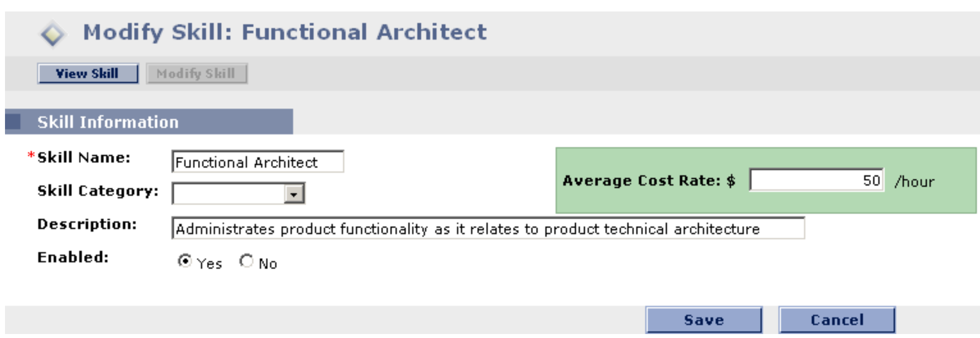


3. Enter any search criteria into the Search for Skill section and click **Search**.

   The Modify Skills search page reopens, displaying the results of your search.



4. Click on a Skill Name to open its Modify Skill page.



5. Make any necessary changes and click **Save**.

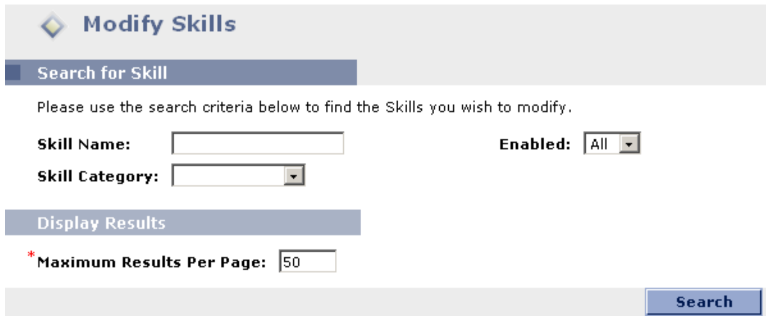
Deleting Skills

To delete a Skill:

1. Log onto Mercury ITG Center.

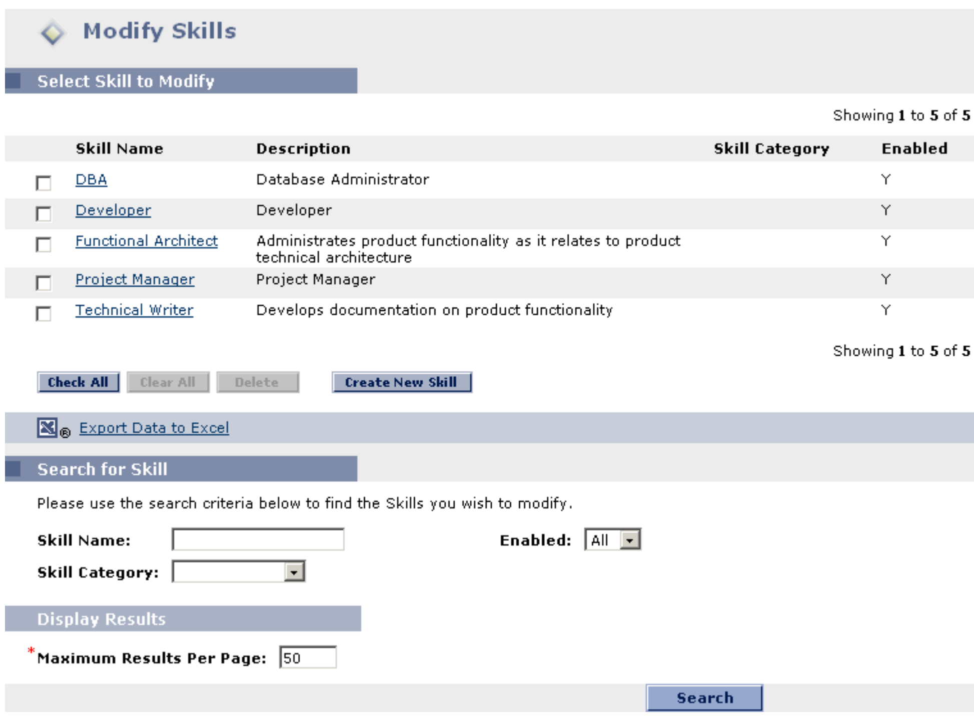
2. Select **Resource > Skills > Modify a Skill** from the menu bar.

The Modify Skills search page opens.



3. Enter any search criteria into the Search for Skill section and click **Search**.

   The Modify Skills search page reopens, displaying the results of your search.



4. Select the check box next to a Skill or Skills and click **Delete**.

   The Skill is deleted. Skills possessed by Resources or used in historical Work Items cannot be deleted. These skills can be disabled.

Setting Up the Base Calendar

The Base Calendar sets the default working and non-working days for your organization. Individual Resources' work schedules can be set using individual Resource calendars.

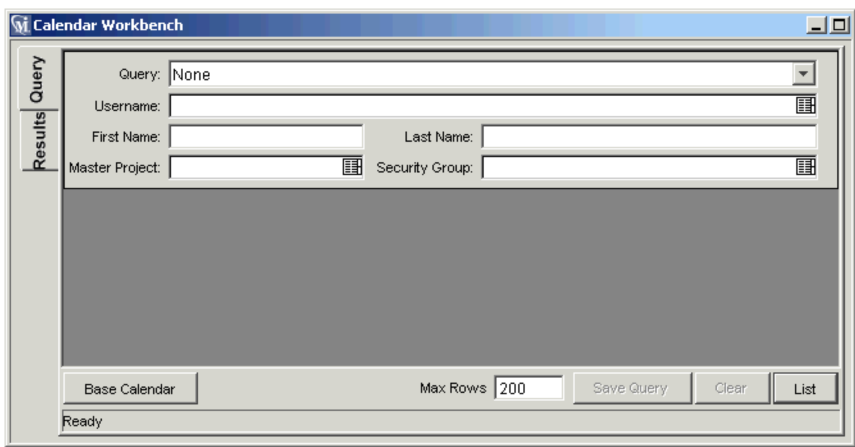
To set up the Base Calendar for your company:

1. Log onto Mercury ITG Center.

2. Open the Workbench interface by selecting **Administration > Open Workbench**.

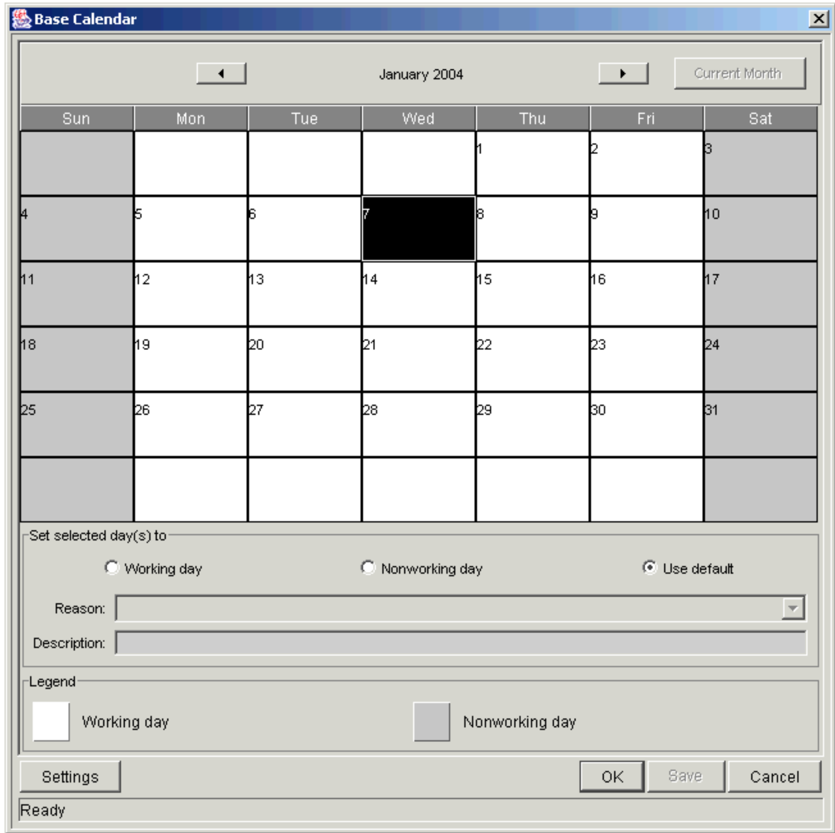
3. Click the **Project Mgmt** screen group and click the Calendars icon.

   The Calendar Workbench opens.



4. Click **Base Calendar**.

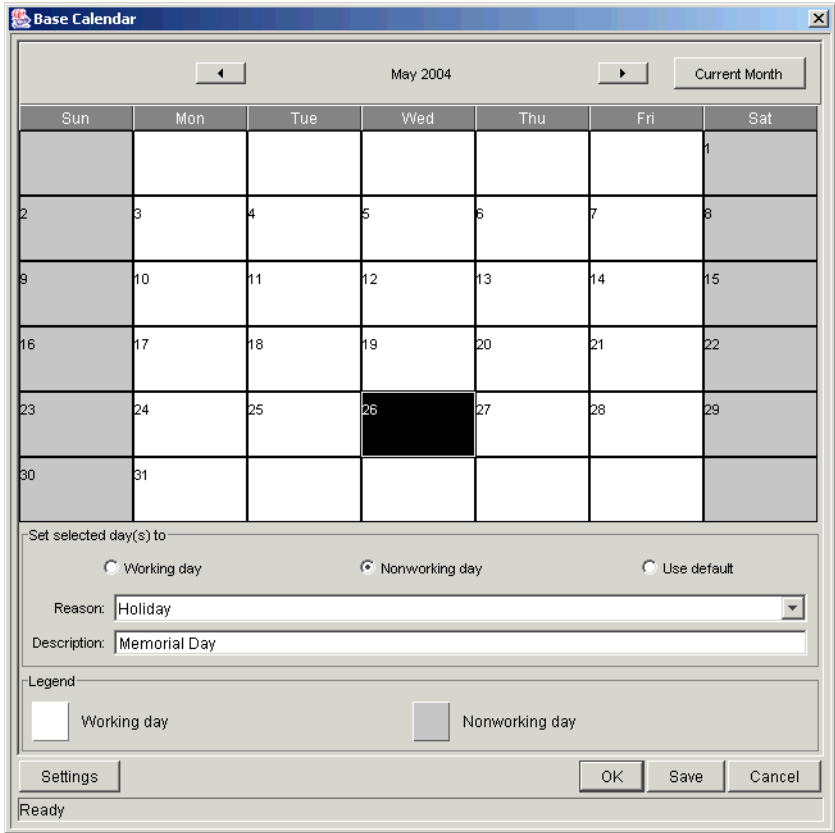
   The Base Calendar window opens.



5. Select a day or range of days by clicking and dragging.

6. Click the the Nonworking day radio button to mark those days as non-working.

   Optionally, select a Reason and enter a Description. Below is a Base Calendar with May 26 set as a nonworking holiday for the American holiday Memorial Day.



7. Click **Save**.

   The Base Calendar is set and will be used as the default for all Resources without a Calendar configured.

Note

By default, the Base Calendar considers all working days to be 10 hours in length. Though you can change this setting by clicking **Settings** in the Base Calendar window, this setting should have been set during your installation of Mercury ITG Center. See Upgrade Guide for more detailed information.

Setting Up Request Work Item Fields

If you have licenses for Demand Management, and you wish to include Requests as Work Items to be tracked using Resource Management, include Work Item fields into your Request Types. Work Item fields include:

- Scheduled Start Date
- Scheduled Finish Date
- Scheduled Duration
- Scheduled Effort

To insert Work Item fields into a Request Type, you must associate the Work Item Field Group with the Request Header Type being used by the Request Type. *Figure 3-1* illustrates the relationship between the Work Item Field Group, a Request Header Type, and a Request Type.

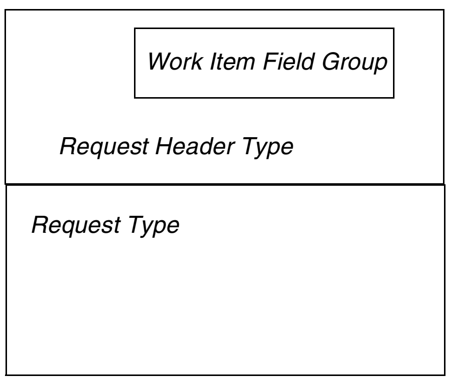


Figure 3-1 Work Item Field Group in a Request Type

Tip

To avoid associating Work Item fields with a Request you don’t want to track, use a 1:1 Request Header Type to Request Type mapping.

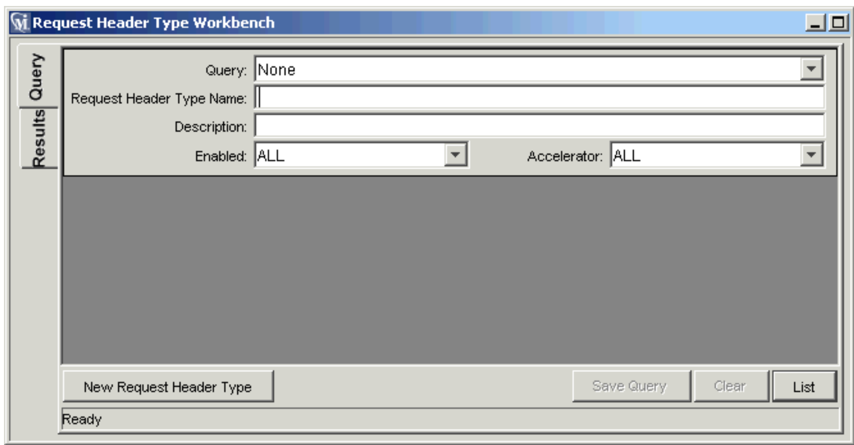
Note

When Field Groups are associated with existing Request Types (through the Request Header Type definition), tables in the Mercury ITG Center database are updated to handle this new configuration. Because of the scope of database changes, you should re-run the Database Statistics on your Database. Instructions for this are included in the System Administration Guide. Contact your System Administrator for help with this procedure.

To associate Work Item fields with a Request Type:

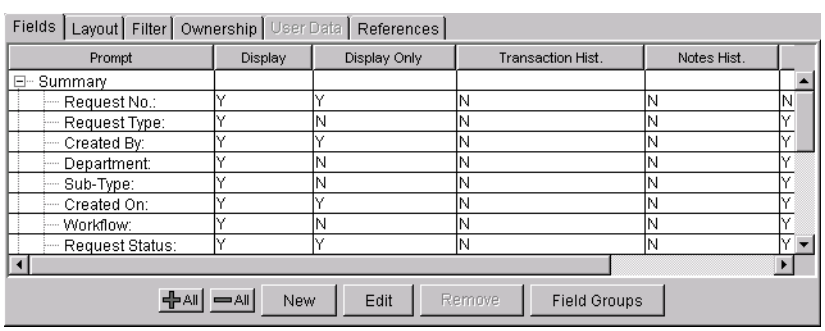
1. Log onto Mercury ITG Center.
2. Open the Workbench.
3. Click the **Demand Mgmt** screen group and click the Request Header Types screen.

   The Request Header Type Workbench opens.



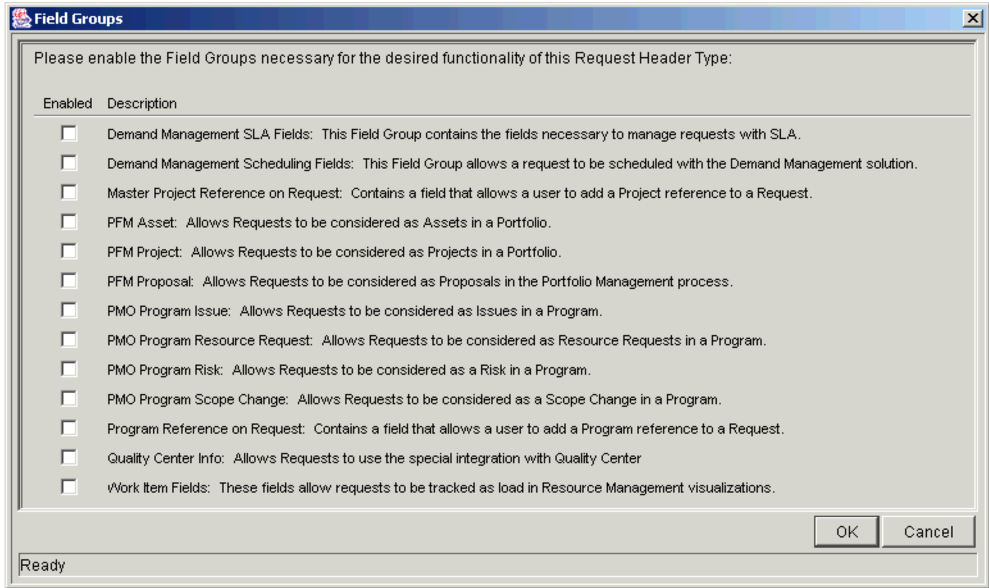
4. Click **New Request Header Type**.

   The Request Header Type window opens to the **Fields** tab.



5. Click **Field Groups**.

   The Field Groups window opens.



Note

Depending on the Mercury ITG products your site has licensed, the Field Groups window may display a different set of options.

6. Select the Enabled check box for the Work Item Fields option and click **OK**.

   The Work Item fields are now associated with the Request Header Type.

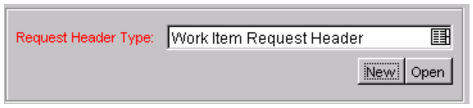
7. Enter any other required or optional information.

8. (optional) Modify other existing Request Header Type fields or create new ones as you see fit. See Configuring a Request Resolution System for more detailed information on modifying Request Header Type fields.

9. Save the Request Header Type.

10. Click the Request Types screen and open the Request Type in which you wish to include Work Item fields.

11. In the Request Header Type field, specify the Request Header Type containing the Work Item fields.



12. (optional) Modify the Request Type as you see fit, including setting field logic and security. See Configuring a Request Resolution System for more detailed information on modifying Request Type fields.

13. Save the Request Type.

    The Request Type now has Work Item fields associated with it and can be tracked using Resource Management.

Note

Certain Request Work Item fields are interdependent, meaning one field might be updated when another field's value is changed. Demand Management field-level security allows you to make Request fields invisible to certain users or sets of users.

Resource Management for Requests may not work correctly if you make an interdependent Request Work Item field invisible to a user. Any user who will be making use of Request Work Item fields must have at least View access to all of them. Edit access to all Work Item fields is not necessary unless the user will be changing Work Item field values.

Chapter 4
Modeling Your Organization

This chapter discusses setting up Resources and modeling your Organization.

The following topics are covered:

- *Setting Up a Resource*
- *Modeling Organization Units*

Setting Up a Resource

In order to use Resource Management, you must first define your Resources. Resources can have many attributes, including:

- First and last name
- Phone number
- Email address
- Direct manager
- Cost rate
- Capacity
- Department
- Skills

Table 4-1 describes Resource attributes that are especially useful. To take full advantage of Resource Management functionality, these attributes should be defined for every Resource.

Table 4-1. Key Resource Attributes

Attribute	Utilization
Cost Rate	Used to calculate Project and Task costs. ex. Cost Rate * Hours Worked = Task Actual Cost See Managing Your Projects (Project Management) (Cost chapter) for more detailed information.
Capacity	Used to calculate Resource capacity for Work Items. See *“Visualizing Assignments”* on page cvi for more detailed information.
Skills	Used in Resource booking and to build Staffing Profiles and Resource Pools. See *“Using Resource Management for Capacity Planning”* on page lxi for more detailed information.

Resources map to Mercury ITG Center users on a 1:1 basis.

Note

A new Resource cannot be created from scratch. A new user must be defined, and then his or her Resource attributes subsequently configured.

While users are created and maintained from the Workbench, Resource information is set in the standard interface.

The following sections discuss Resource setup in more detail:

- *Setting Resource Attributes*
- *Setting Up the Resource Calendar*
- *Resource Security*

Setting Resource Attributes

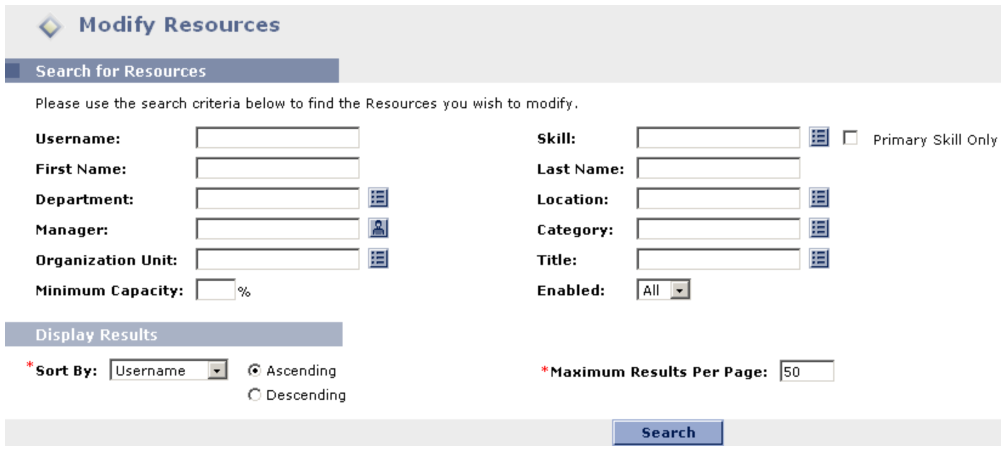
General Resource attributes are set in the standard interface.

To configure attributes for a Resource:

1. Log onto Mercury ITG Center.

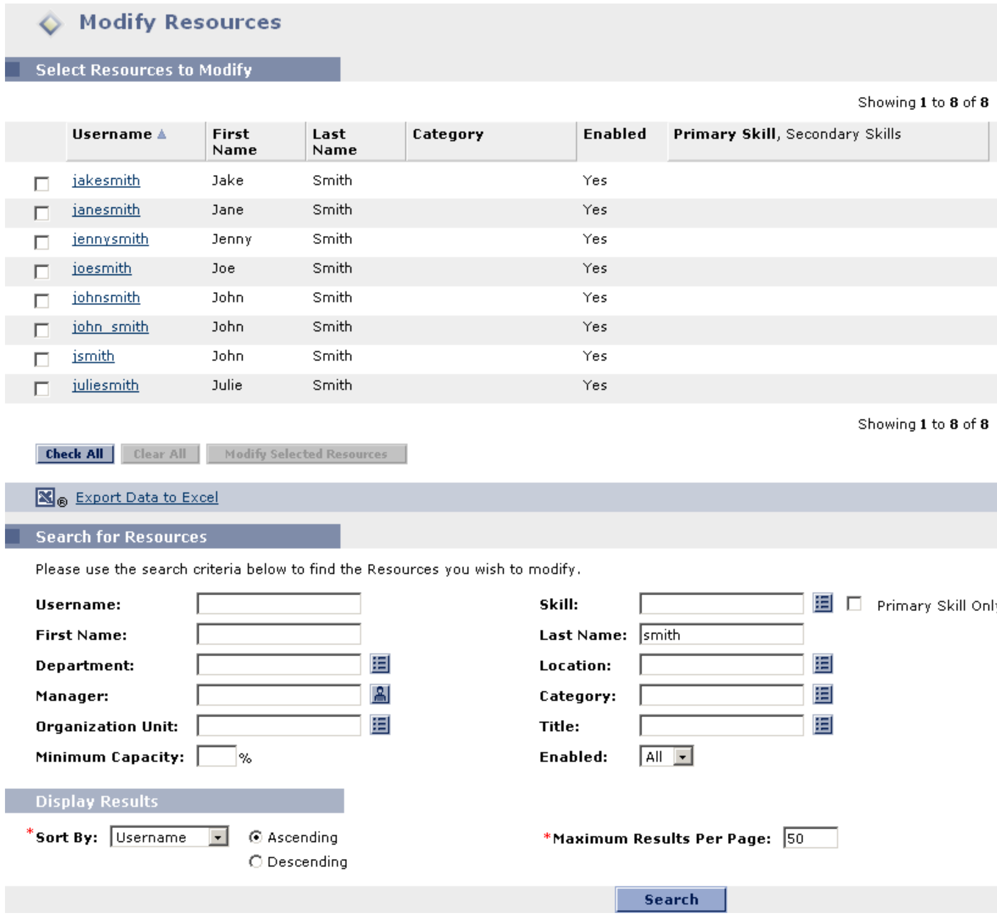
2. Select **Resource > Resources > Modify Resource** from the menu bar.

   The Modify Resources search page opens.

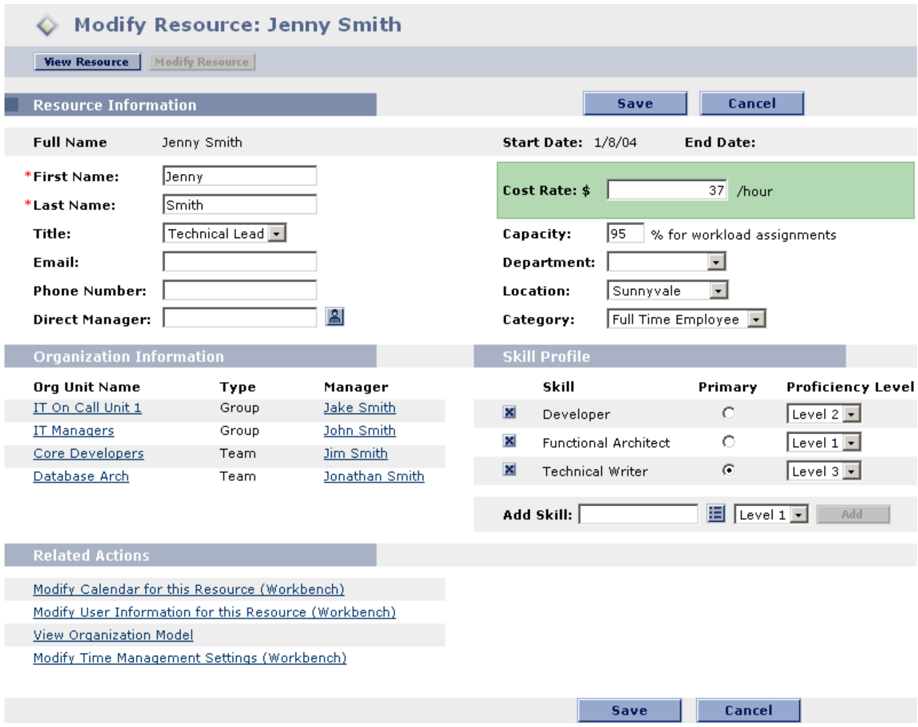


3. Enter any search criteria into the Search for Resources section and click **Search**.

   The Modify Resources search page refreshes, displaying the results of your search.



4. Click on a Resource's Username to open their Modify Resource page.



5. Fill in any desired Resource attributes.

> **Note**
> Depending on your level of Cost data access, you may not be able to see or edit the Cost Rate field.

To add a Skill:

a. Select one from the Add Skill auto-complete list.

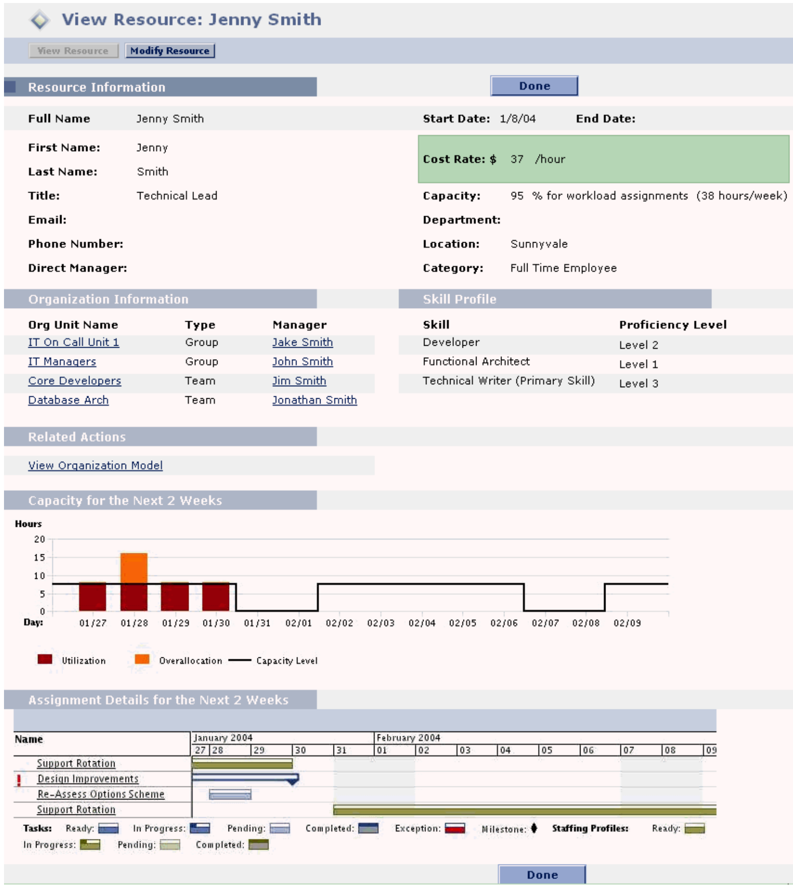
b. Select a proficiency level from the drop down list.

c. Click **Add**. The Skill will be associated with the Resource upon save.

   To add more Skills, repeat as necessary.

6. Click **Save** to save all changes to the Resource.

   The View Resource page opens, displaying the Resource's new information.



Setting Up the Resource Calendar

A Resource's Calendar, which specifies working and non-working days for that particular Resource, is configured in the Workbench.

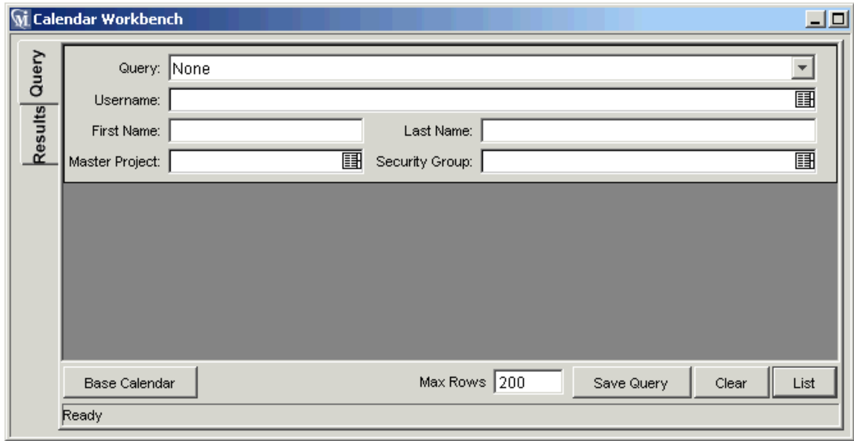
To set a Resource's Calendar:

1. Open the Resource's Calendar by clicking the Modify Calendar for this Resource (Workbench) link on the Modify Resource page.

   Or:

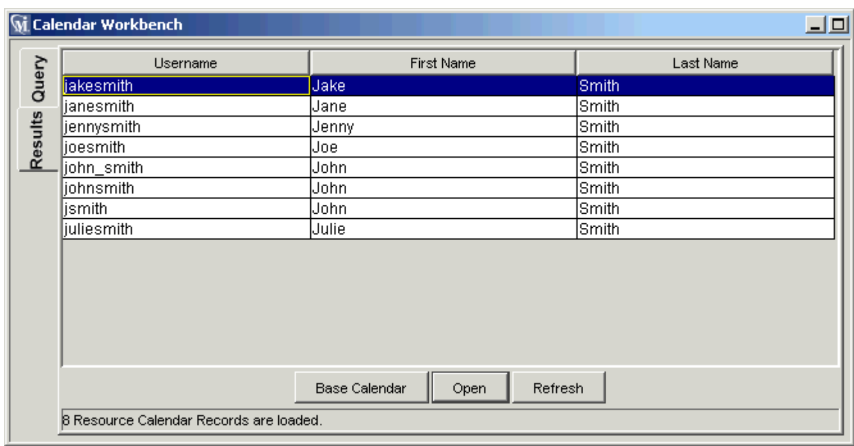
   a. Open the Workbench.

   b. Click the **Project Mgmt** screen group and click the Calendars icon. The Calendar Workbench opens.



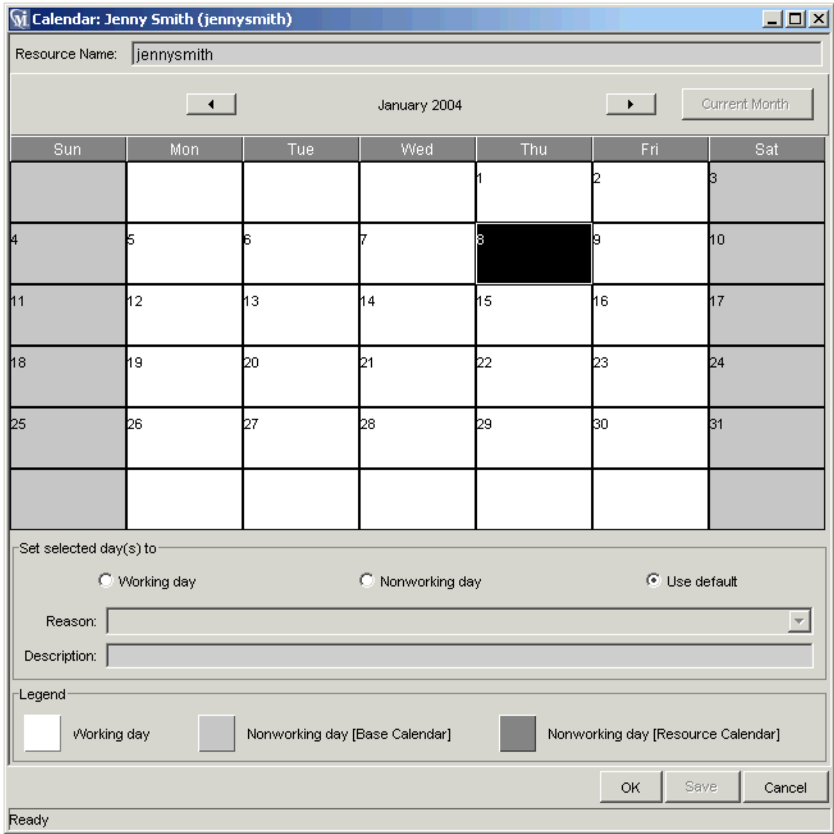
c. Enter any search criteria to locate the user and click **List**.

The **Results** tab opens, displaying the results of your search.



d. Double-click the name of the Resource whose Calendar you wish to configure.

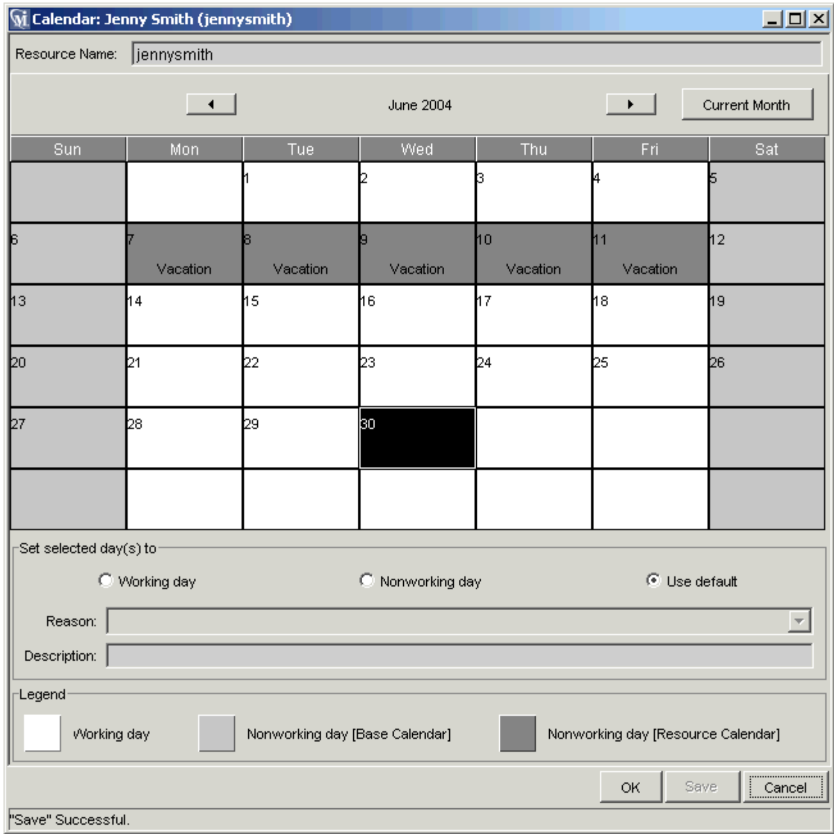
The Resource's Calendar window opens.



2. Select a day or range of days by clicking and dragging.

3. Choose the Nonworking day radio button to mark those days as non-working.

   Optionally, select a Reason and enter a Description. Below is the Calendar for a Resource who is taking a vacation during the second week of June.



4. Click **Save**.

   The Resource's Calendar is set and will be used to calculate that Resource's Capacity in Resource Management visualizations.

Resource Security

Resource information can have various layers of security applied to it. Depending on the Access Grants a user has, that user can view his own Resource information, view information on other Resources, edit information for Resources he manages, or edit all Resources in the system. These Access Grants are also needed to use the Analyze Assignment Load visualizations. *Table 4-2* describes these Access Grants in more detail.

Table 4-2. Resource Information Access Grants

Access Grant	Description
View my own personal Resource info only	The user can only view their own Resource information.
View all resources	The user can only view information for all Resources in the system.
Edit only resources that I manage	The user can view and edit information for Resources that list them as Direct Manager.
Edit all resources	The user can view and edit information for all Resources in the system.

Cost Access Grants also come into play when a user is viewing Resource data: for example, the Cost Rate can be sensitive information. *Table 4-3* discusses the interaction of Cost Access Grants with Resource viewing.

Table 4-3. Cost Access Grants and Resource Information

Access Grant	Description
View Cost Data	The user can view a Resource's Cost Rate, but cannot edit it, even from the Modify Resource page.
Edit Cost Data	The user can view a Resource's Cost Rate and change it from the Modify Resource page.
(none)	The Cost Rate field is not displayed to the user.

Access Grants are linked to a user via their Security Group membership. For more information on user security, see Security Model Guide and Reference.

Modeling Organization Units

Resources can be members of Organization Units, which can stand on their own or be arranged in relation to one another to form an Organization Model. *Figure 4-1* illustrates an Organization Model with two large independent Organization Units, each made up of child Org Units.

The Organization Model is visible at all times from the View Organization Model page. To open this page, select **Resource > Organization Model > Browse the Org Model** from the menu bar.

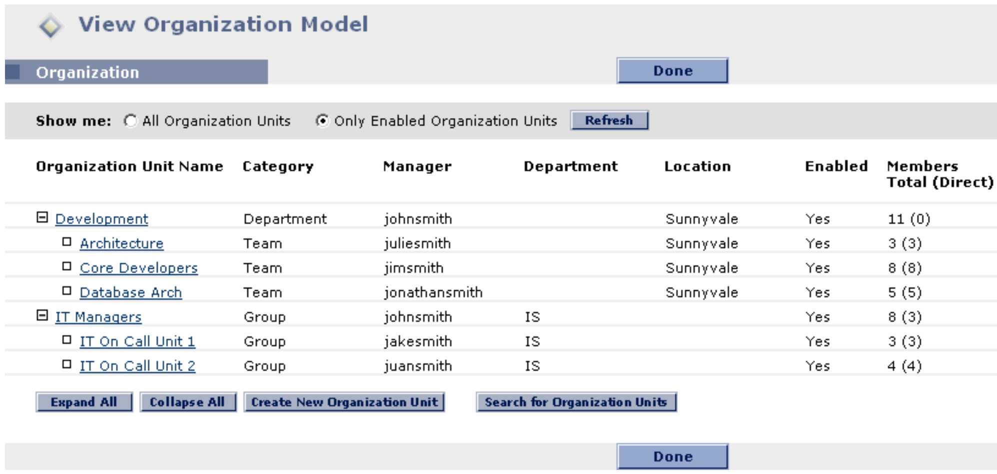


Figure 4-1 Sample Organization Model

Organization Units can have Budgets, Staffing Profiles, and Resource Pools associated with them, making it easy to run comparisons. *Figure 4-2* depicts a Portlet comparing the Budget for an entire IT Organization Unit with three Project Budgets owned by its members. We can see that during almost every month, the combined Budgets for these Projects exceeds the Organization Unit's, in some cases by a wide margin.

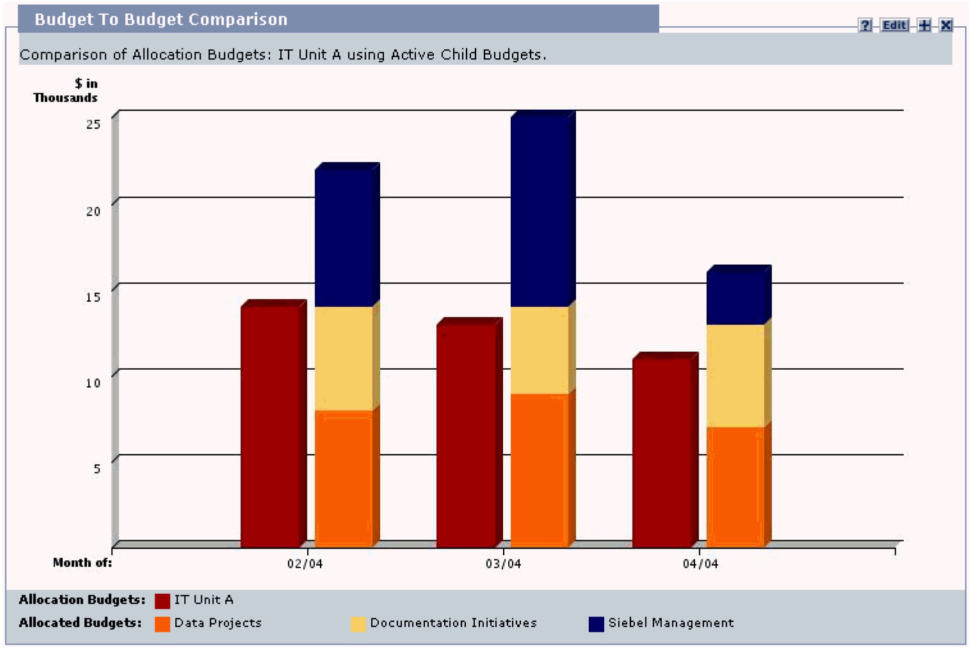


Figure 4-2 Budget to Budget Comparison Portlet showing Organization Unit Budget against three Project Budgets

You can also show the assignment load for all Resources in an Organization Unit with the Analyze Assignment Load page. *Figure 4-3* shows the Analyze Assignment Load page for an Organization Unit whose members are over-booked for one week and under-utilized for several more. The total capacity for the Organization Unit is calculated from each Resource's Calendar and Workload Capacity.

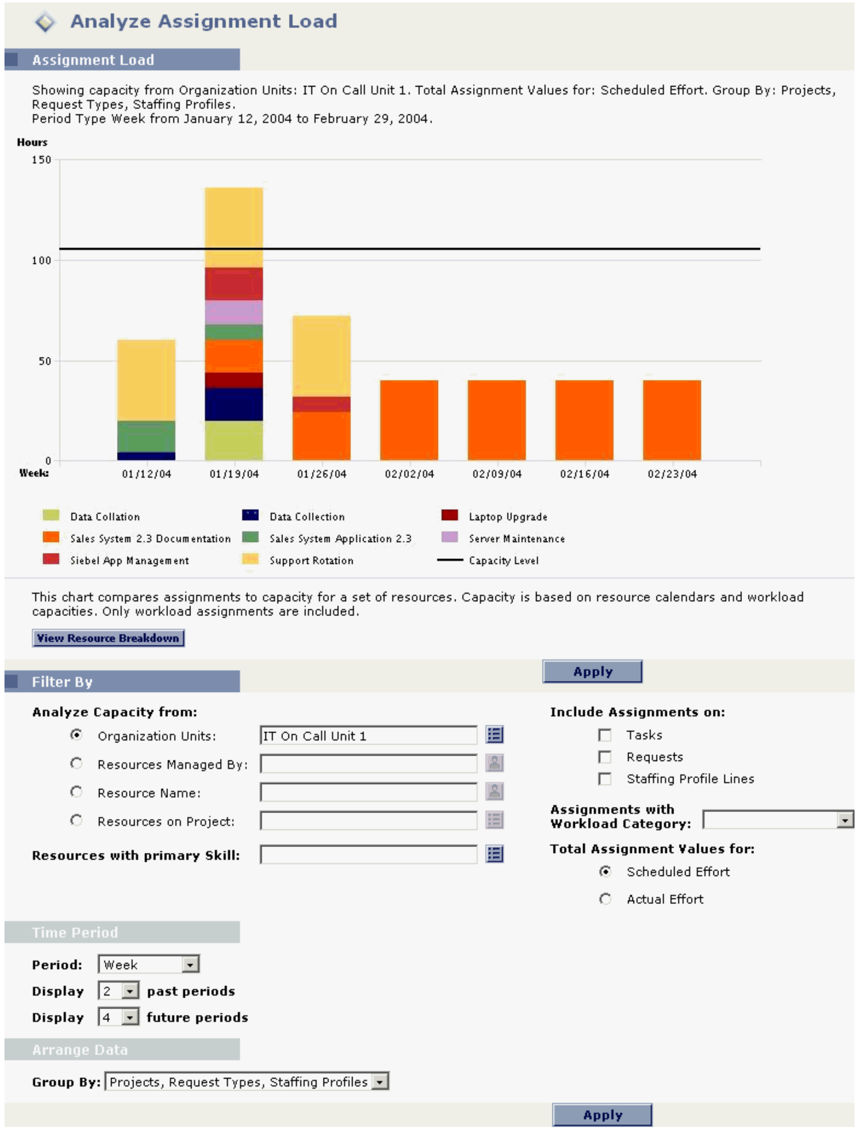


Figure 4-3 Analyze Assignment Load page

The following sections discuss Organization Units in more detail:

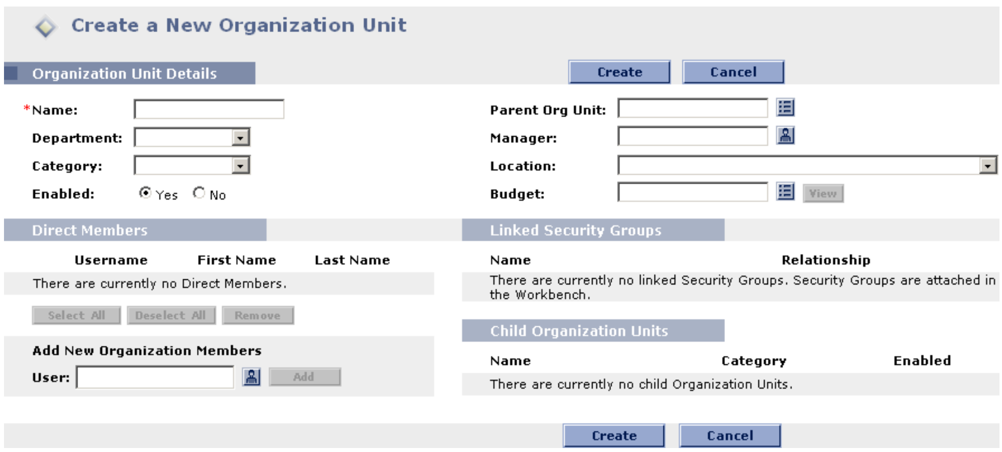
- *Creating an Organization Unit*
- *Building the Organization Model*
- *Linking Organization Units to Security Groups*

Creating an Organization Unit

To create an Organization Unit:

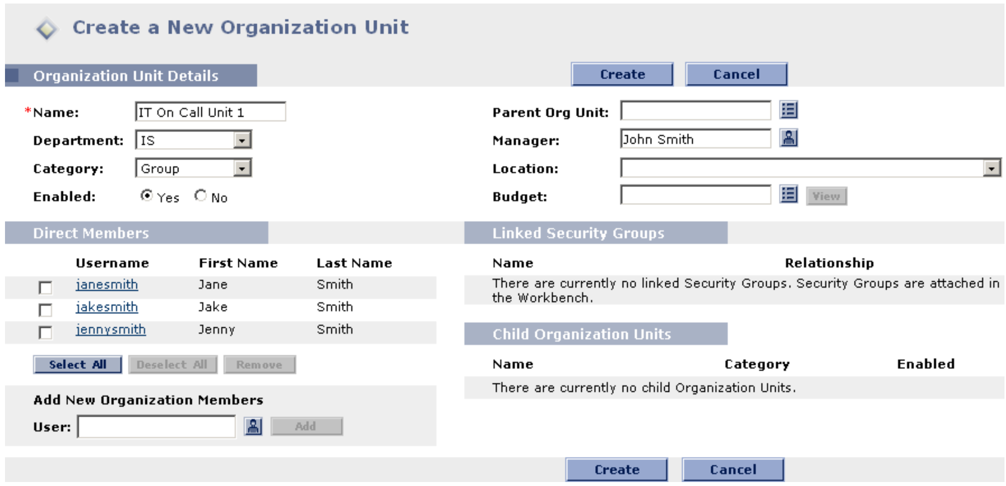
1. Log onto Mercury ITG Center.
2. Select **Create > Organization Unit** or **Resource > Organization Model > Create an Org Unit** from the menu bar.

   The Create a New Organization Unit page opens.



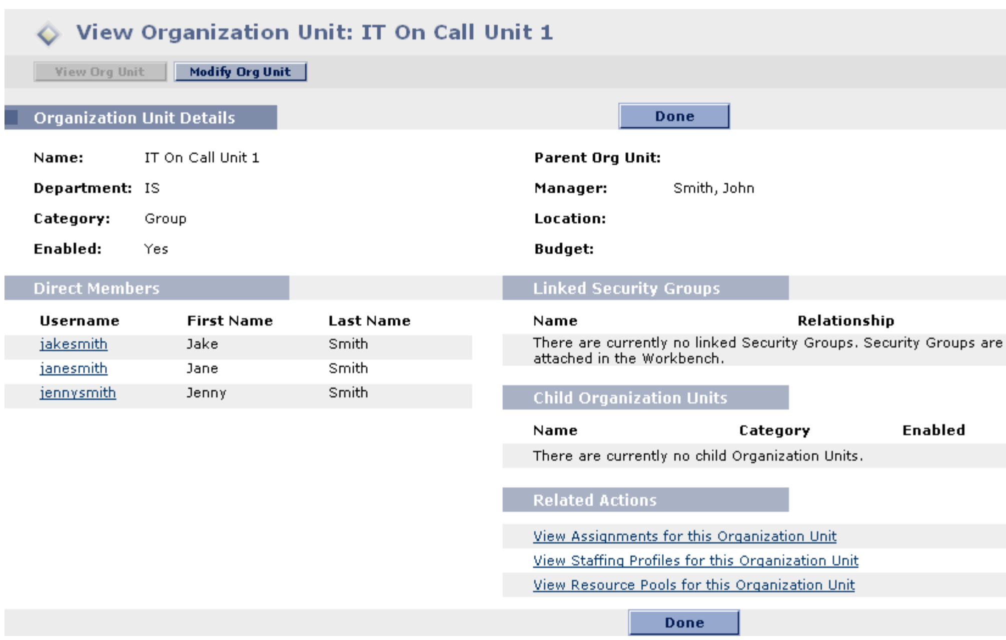
3. Fill in the Organization Unit Name and any other desired information.
4. Add users to the Organization Unit by selecting a user from the Username multi-select auto-complete list and clicking **Add**.

   The Create a New Organization Unit page reloads with the selected users displayed in the Direct Members list.



5. Click **Create** to create the Organization Unit.

   The View Organization Unit page opens, displaying the newly-created Organization Unit.



Building the Organization Model

The Organization Model is a hierarchy of Organization Units. *Figure 4-4* illustrates the terms used by Resource Management when defining the Organization Model.

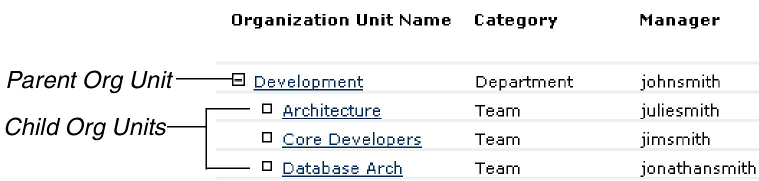
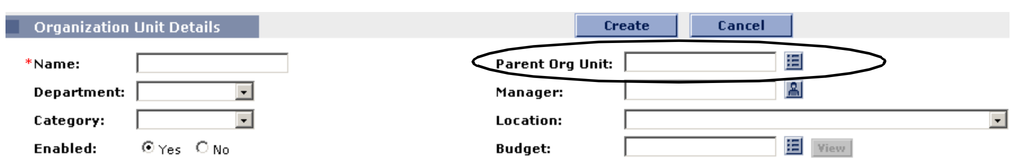
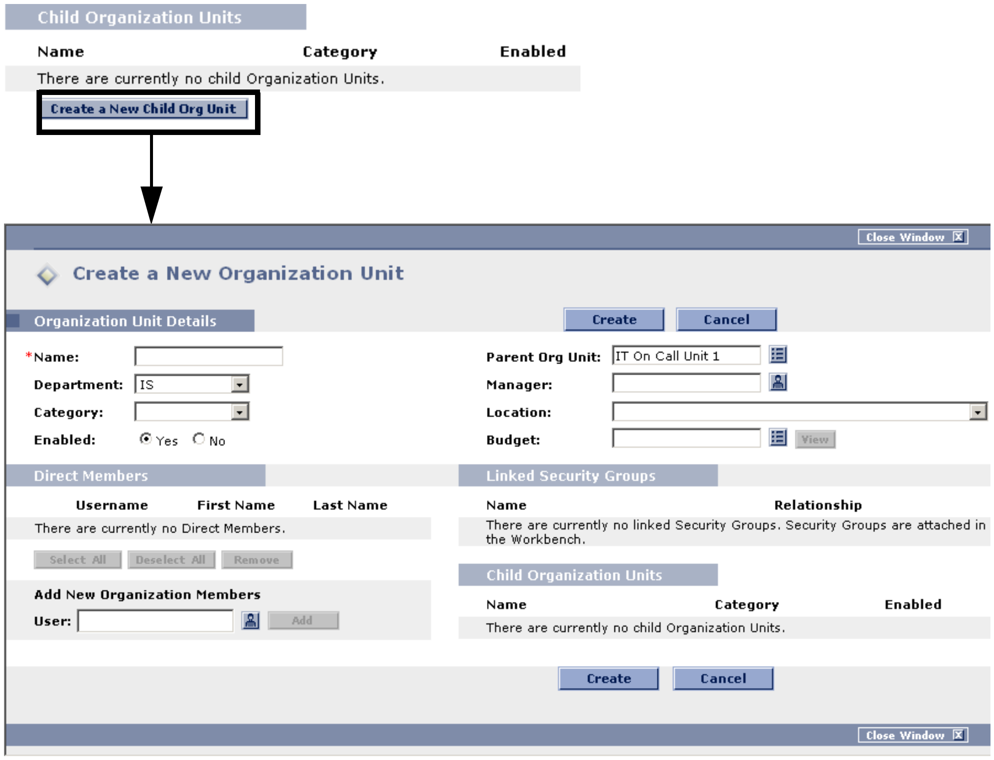


Figure 4-4 Organization Model Hierarchy Terms

An Organization Unit's Parent is defined from its Modify or Create a New Organization Unit page. Use the Parent Org Unit field in the Organization Unit Details section to set the Organization Unit's parent.



The Modify Organization Unit page also allows you to create a new child Organization Unit. Click **Create a New Child Org Unit** to create a new child Organization Unit in a new window.



You can also select an Organization Unit in the View Organization Model page and click **Create New Organization Unit.**

To reach an Organization Unit's Modify Organization Unit page:

1. Log onto Mercury ITG Center.

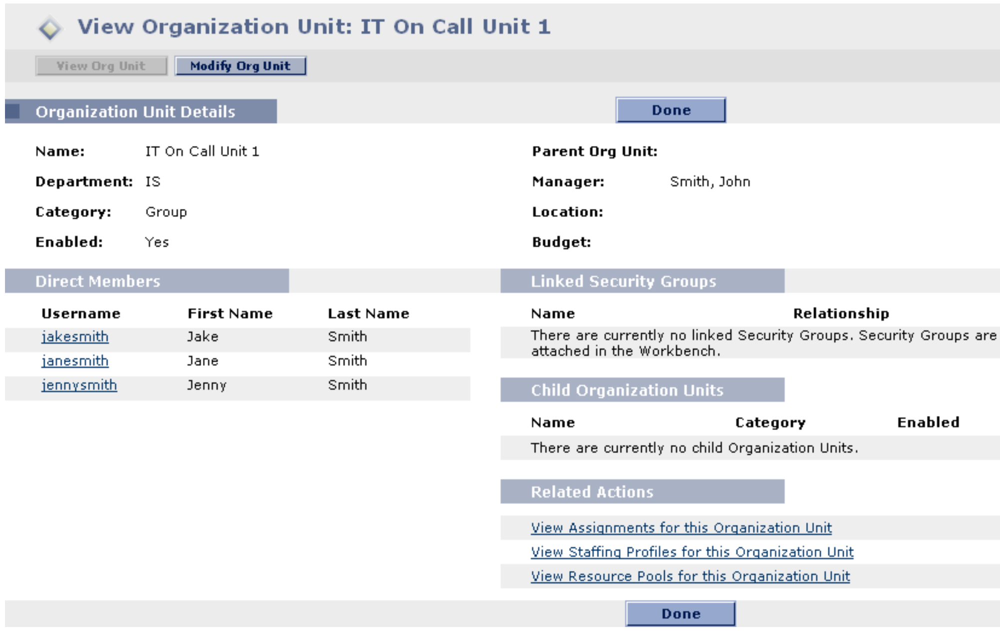
2. Search for the Organization Unit by selecting **Search > Organization Units** or **Resource > Organization Model > Modify Org Units** from the menu bar.

   or

   Select **Resource > Organization Model > Browse the Org Model** from the menu bar.

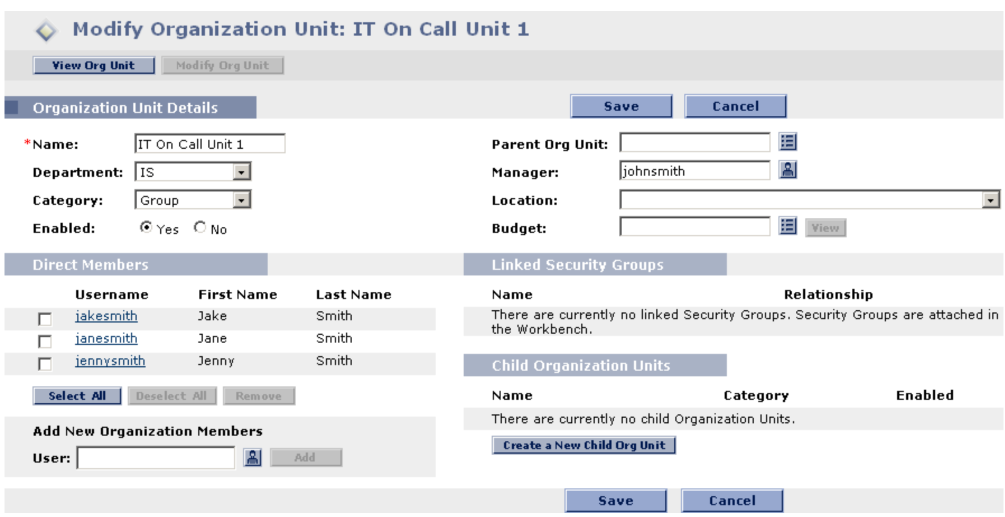
3. Click the name of the Organization Unit you wish to modify.

The View Organization Unit page opens.



4. Click **Modify Org Unit**.

The Modify Organization Unit page opens.



Linking Organization Units to Security Groups

Security Groups can be linked to Organization Units. This can allow your security configuration to more accurately reflect your business needs, as well as supply a more convenient and intuitive way of adding or removing security from users by associating or dissociating them from Organization Units. Doing so also distributes the maintenance of Security Groups from Mercury ITG Administrators to business users who actually manage Organization Units.

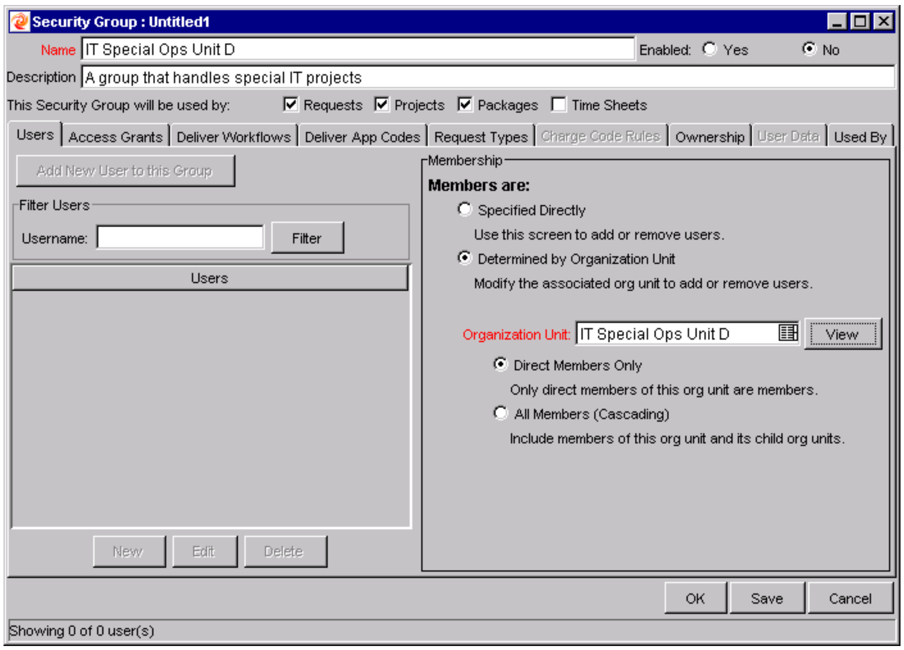


Figure 4-5 Security Group window showing Security Group membership determined by an Organization Unit's direct members

With Resource Management, Security Group membership can be determined in the following ways:

- **Specified Directly** — Security Group members are specified in the **Users** tab of the Security Group window in the Workbench interface. This method does not take the Organization Model into account.
- **Determined by Organization Unit** — The Security Group's member list is determined by the Organization Unit to which it is linked. An Organization Unit must be specified for this method to be used.

Note

When a Security Group's members are determined by an Organization Unit, the Organization Unit's member list over-writes that of the Security Group.

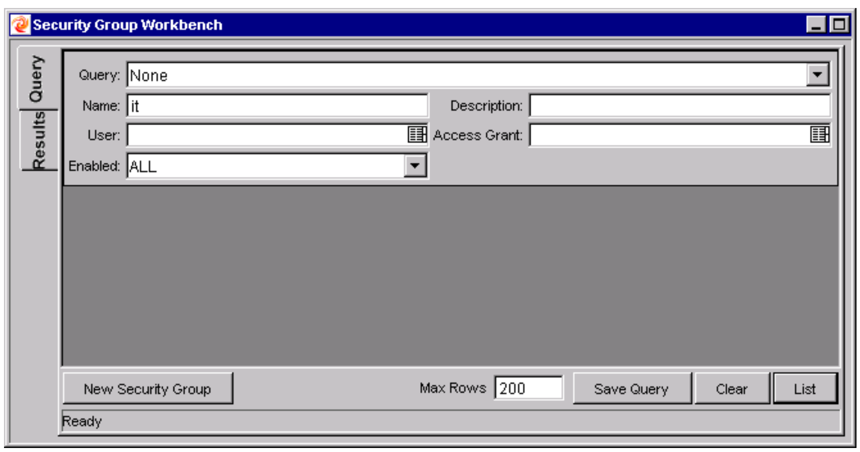
If a Security Group's members are determined by its Organization Unit, an additional level of control is added:

- **Direct Members Only** — Only the direct members of the Organization Unit are part of the Security Group.
- **All Members (Cascading)** — The direct members of the Organization Unit and all the members of all its child Organization Units are part of the Security Group.

To link a Security Group to an Organization Unit:

1. Open the Workbench.
2. Click the **Sys Admin** screen group and the Security Groups icon.

   The Security Group Workbench opens.



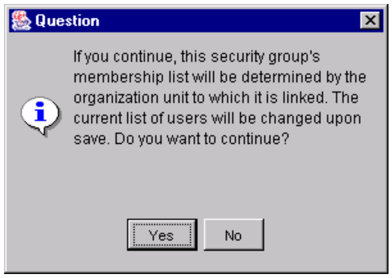
3. Create a new Security Group or search for and open an existing one.

   The Security Group window opens.

4. In the **Users** tab, select the Determined by Organization Unit radio button.

   A question dialog opens, warning you that the Security Group's present member list will be overridden by the current members of the Organization Unit.

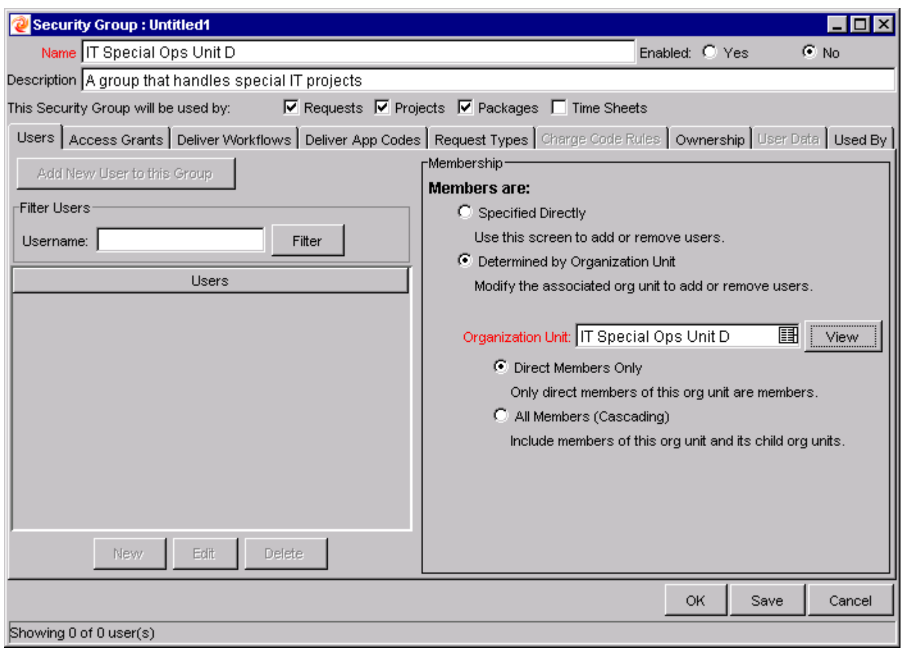
5. Click **Yes** to continue.



The Organization Unit auto-complete field becomes enabled and required.

6. Select an Organization Unit to be linked to the Security Group.

7. Specify either Direct Members Only or All Members (Cascading) for the Security Group's member list.



8. Click **Save**.

You will see the new list of members for the Security Group.

Chapter 5
Using Resource Management for Capacity Planning

This chapter explains how to use Resource Management functionality, including Resource Pools, Staffing Profiles, and related visualizations, for Resource capacity planning.

The following topics are covered:

- *Capacity Planning Overview*
- *Planning Capacity with Resource Pools*
- *Tracking Demand with Staffing Profiles*
- *Analyzing Resource Pools*
- *Analyzing Staffing Profiles*

Capacity Planning Overview

Resource Management can be used for Resource capacity planning. Resource capacity planning can consist of the following activities:

- Gauging present Resource capacity and workload
- Predicting future Resource capacity in terms of needed Skills or Resources
- Forecasting future Resource demand in terms of needed Skills or Resources
- Viewing historical trends in Resource allocation
- Comparing present Resource usage to previous forecasts

Mercury Resource Management includes two basic tools to help in Resource capacity planning:

- **Resource Pools** — Resource Pools provide a way to track the forecast Resource capacity, broken down by Skill. This lets the manager see what Resources and Skills they will have on-hand to apply to future work.
- **Staffing Profiles** — Staffing Profiles allow a manager to plan the future allocation of Resources, broken down by Skill. This lets the user see what kinds of Resources and Skills they will need for future work.

Planning Capacity with Resource Pools

Resource Pools enable Resource planners to designate future Resource capacity, arranged by Skill, on a monthly basis. Program and Project managers can then build Staffing Profiles that draw from a Resource Pool, and use visualizations to assess whether proposed Projects or Programs are within capacity bounds outlined by the Resource Pool. A Resource Pool is broken down across monthly segments, with each line specifying the "full-time equivalent" (FTE) capacity for a Skill, and optionally for a Resource that possesses the Skill. Resource Pools can be associated with Organization Units or Programs, linking them with their role in the business. *Table 5-1* describes the key attributes of a Resource Pool.

Table 5-1. Resource Pool Attributes

Field	Description
Resource Pool Information	
Pool Status	The status of the Resource Pool. Possible values: **New**, **Proposed**, **Under Review**, **In Rework**, **On Hold**, **Approved**, **Rejected**, **Cancelled**, **Closed**
Active	Whether or not the Resource Pool is active. Inactive Resource Pools are not included in Resource Management visualizations.
Name	The name of the Resource Pool.
Created On	The date the Resource Pool was created.
Created By	The user who created the Resource Pool.
Description	A description of the Resource Pool.

Table 5-1. Resource Pool Attributes

Field	Description
This Resource Pool is for	Defines whether the Resource Pool is associated with an Organization Unit, a Program (if Mercury Program Management is installed), or Unspecified.
Start Period	The starting period (a fiscal month) for the Resource Pool.
Finish Period	The ending period (a fiscal month) for the Resource Pool.
Resource Pool Breakdown	
Skill	The Skill being planned. Each Resource Pool line can hold one Skill.
Resource	The Resource for the Skill. Each Resource Pool line can hold one Resource.
Total FTE's for Month	The total Full Time Equivalents for each month being planned in the Resource Pool.
Average FTE's for Quarter	The average Full Time Equivalents per quarter being planned in the Resource Pool.
Notes	Any notes on the Resource Pool itself.

Figure 5-1 depicts a Resource Pool containing four different Skills and their Full-Time Equivalents for the months of February through April.

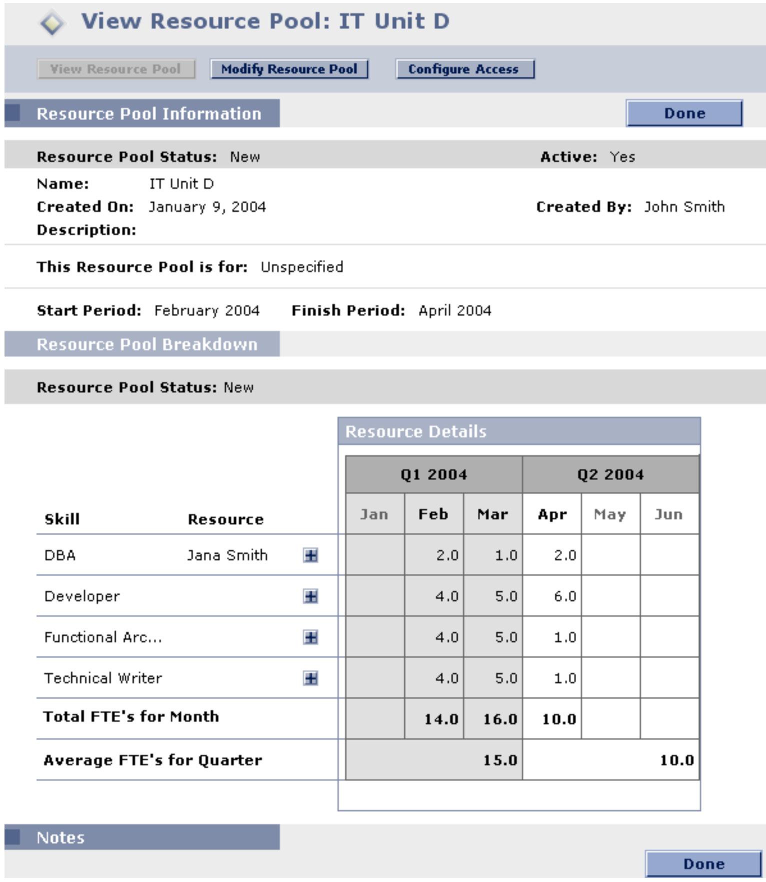


Figure 5-1 Resource Pool

Each Skill has an even FTE of 1, meaning one person with the specified Skill will be fully available during that fiscal month (or the equivalent, such as two people available at 1/2 time each).

In this Resource Pool, there is only one Skill with a Resource attached; “Jana Smith” is specified as the DBA for the Pool. The other Skills could lack specific Resources for a number of reasons:

- The specific identity of the Resource is not important for planning purposes.
- The specific Resource is not yet determined.
- The Line represents more than one Resource.
- The specific Resource has not been hired.

The following sections discuss creating and configuring access to Resource Pools in more detail:

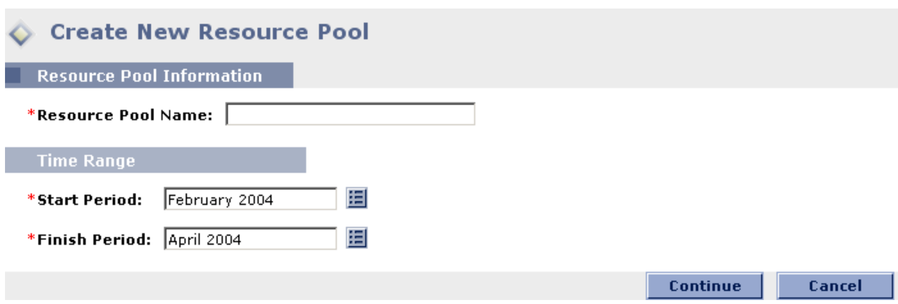
- *Creating a Resource Pool*
- *Resource Pool Security*

Creating a Resource Pool

To create a Resource Pool:

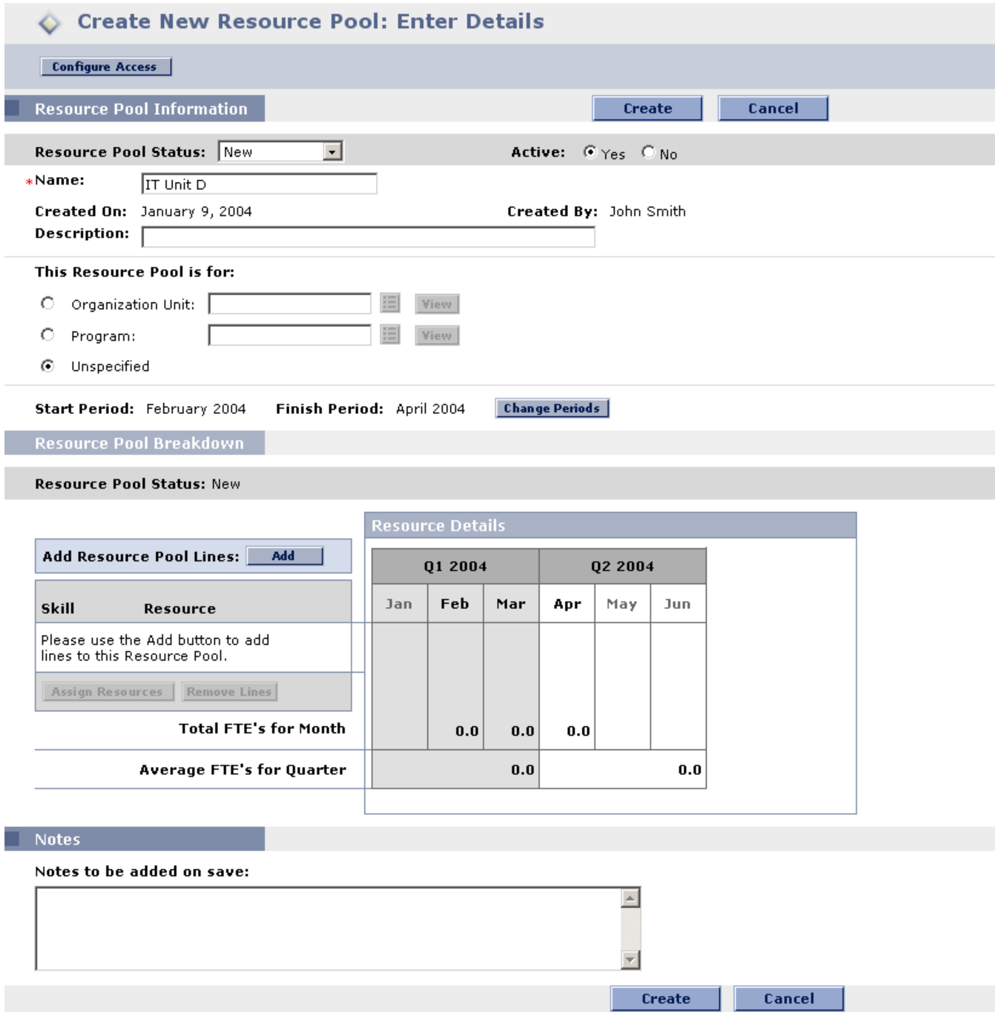
1. Log onto Mercury ITG Center.
2. Select **Create > Resource Pool** or **Resource > Resource Pools > Create a Resource Pool** from the menu bar.

   The Create a New Resource Pool page opens.



3. Fill in the Resource Pool Name and define a Start Period and Finish Period for the Resource Pool.
4. Click **Continue**.

   The Create a New Resource Pool: Enter Details page opens.

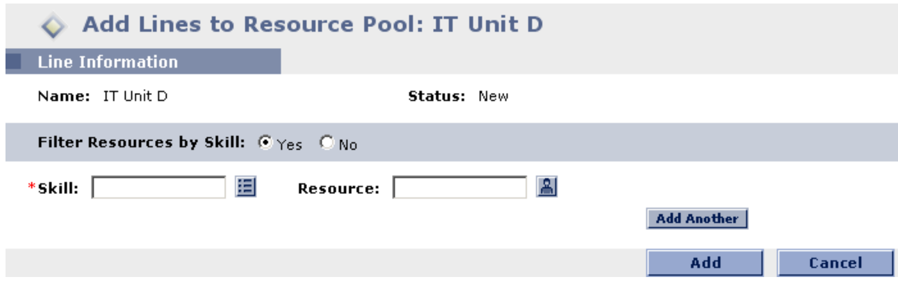


5. Fill in any desired fields in the Resource Pool Information section.

6. Add lines to the Resource Pool Breakdown.

   a. Click **Add**.

      The Add Lines to Resource Pool page opens.



b. Select a Skill for the Resource Pool line.

c. (optional) Specify a Resource for the Resource Pool line.

Only Resources with the selected Skill will appear in the auto-complete list unless you select **No** in the Filter Resources by Skill option.

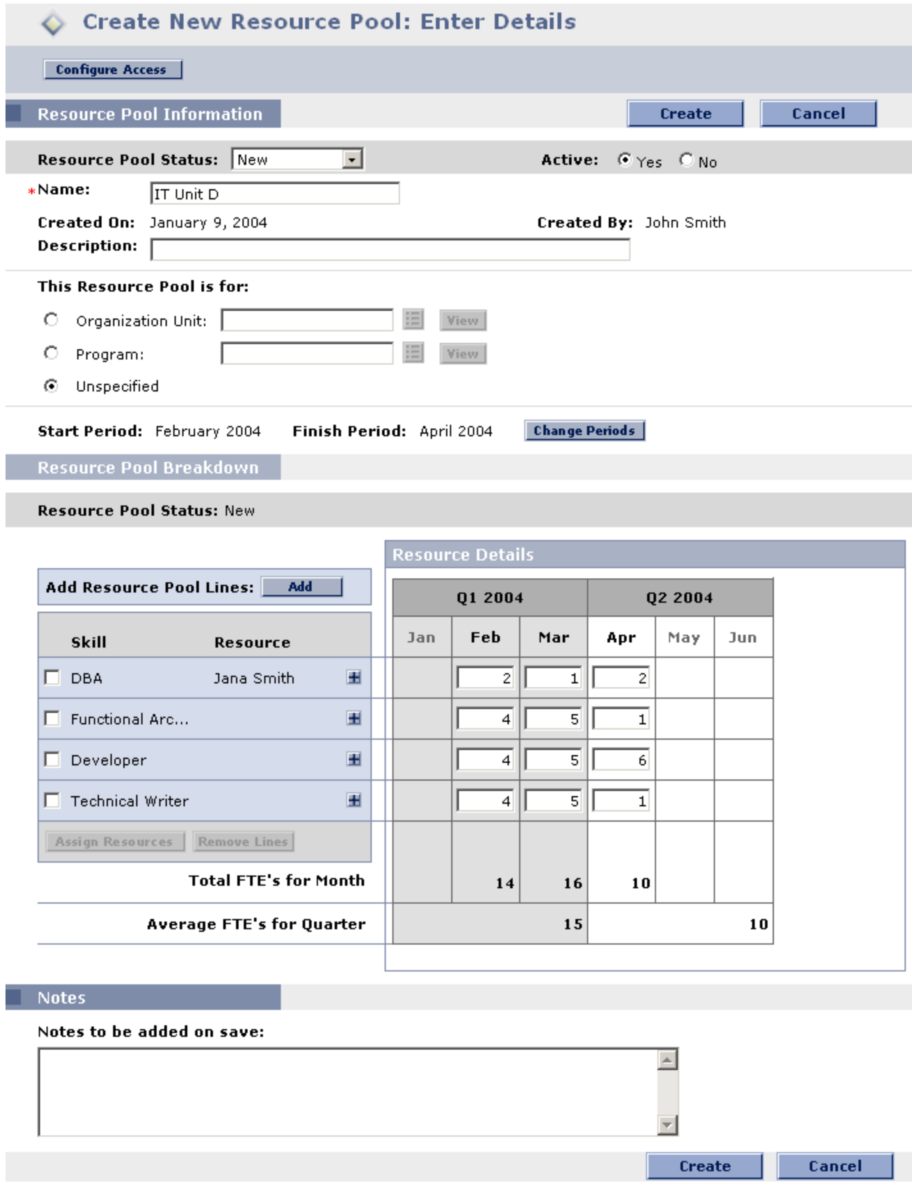
d. Click **Add**.

The Create a New Resource Pool: Enter Details page reloads with the Resource Pool lines added.

e. Repeat as necessary.

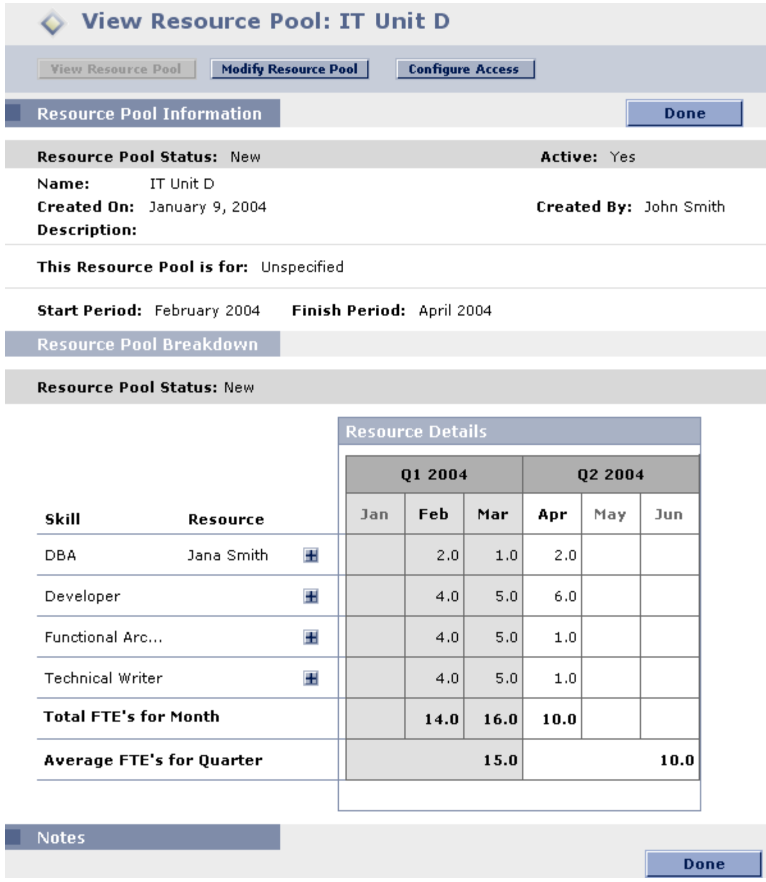
You can add more than one line to the Resource Pool at a time without returning to the Create a New Resource Pool: Enter Details page by clicking **Add Another** once you have filled in the values for one line.

7. Specify Full-Time Equivalent values for each Resource Pool line.



8. Click **Save**.

   The Resource Pool is created and the View Resource Pool page opens.



Resource Pool Security

Access to a Resource Pool is controlled primarily through Access Grants set in the Security Group definitions. Additionally, the user who creates a Resource Pool can specify a list of users who can view it, edit its basic information, edit its lines, or edit its security. The following sections describe the security surrounding Resource Pools in more detail:

- *Resource Pool Access Grants*
- *Resource Pool Configure Access Page*
- *Using the Configure Access Page*

Resource Pool Access Grants

Users are linked to Access Grants through the Security Group they are a part of. The Access Grants related to Resource Pools are discussed in more detail in

Table 5-2. Without these Access Grants, a user cannot view or edit a Resource Pool regardless of whether they are specified in the list on the Resource Pool's Configure Access page. For more information on Access Grants and Security Groups, see the Security Model Guide and Reference.

Table 5-2. Resource Pool Access Grants

Access Grant	Description
View Resource Pools	The user can view any Resource Pool for which they are on the specified View or Edit list.
View All Resource Pools	The user can view any Resource Pool in the system, even if they are not listed in the View or Edit list.
Edit Resource Pools	The user can edit any Resource Pool for which they are on the specified Edit list.
Create Resource Pools	The user can create new Resource Pools. Supplemental to the Edit Resource Pools or Edit All Resource Pools Access Grant.
Edit All Resource Pools	The user can edit any Resource Pool in the system.
Update Resource Pool Status	The user can update the Pool Status. Supplemental to the Edit Resource Pools or Edit All Resource Pools Access Grant.
Approve Resource Pools	The user can set the Pool Status to **Approved**. Supplemental to the Edit Resource Pools or Edit All Resource Pools Access Grant.

Resource Pool Configure Access Page

The Configure Access page for a Resource Pool is used to grant additional editing access to the Resource Pool to each user on the list individually. All users listed on the Configure Access page minimally have viewing access.

Note

Without the proper Access Grants, a user cannot view or edit a Resource Pool regardless of whether they are specified in the list on the Resource Pool's Configure Access page. See *"Resource Pool Access Grants"* on page 65 for more detailed information.

The Configure Access page options are discussed in more detail in *Table 5-3*.

Table 5-3. Security Options for Resource Pool Configure Access Page

Option	Description
View Access	The user can view the Resource Pool but not edit its information. Any user listed has View access.
Edit Basic Resource Pool Information	The user can edit the fields in the Resource Pool Information section, but not the actual Resource Pool Breakdown, nor change periods.
Edit Plan	The user can edit the Resource Pool Breakdown, but not the fields in the Resource Pool Information section.
Edit Security	The user can use the Configure Access page to edit viewing or editing security for the Resource Pool.

Using the Configure Access Page

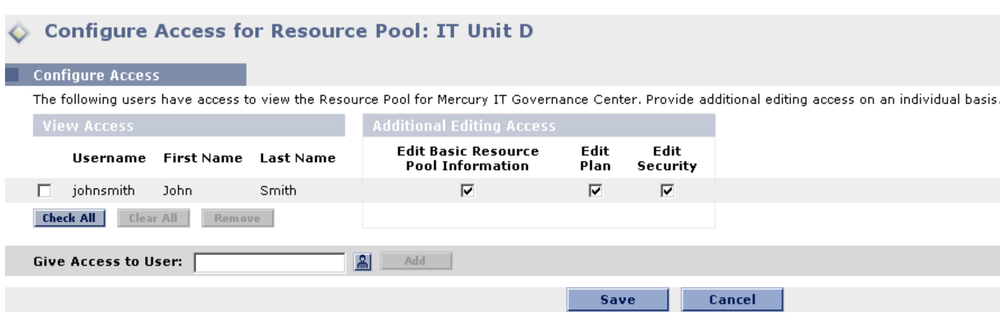
To set up a list of users with View or Edit access to a Resource Pool:

1. Open the View Resource Pool page.

   If you have permission to modify the Resource Pool, the **Modify Resource Pool** and **Configure Access** buttons will be enabled.

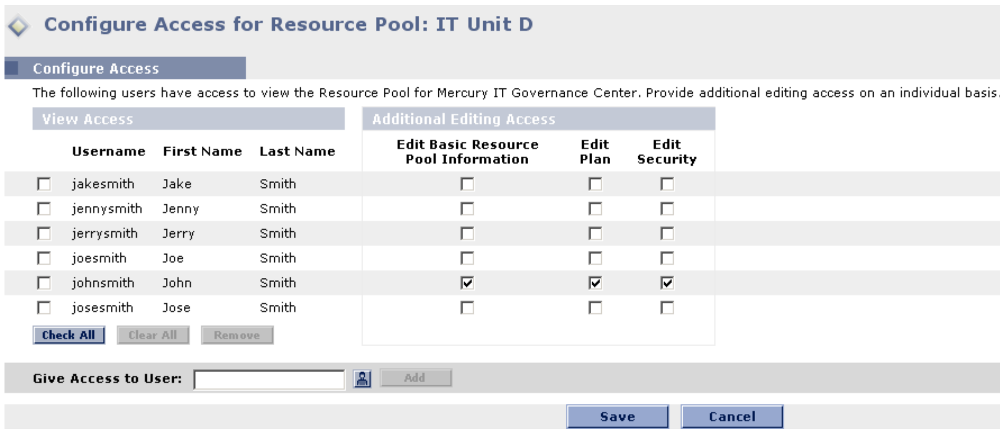
2. Click **Configure Access**.

   The Configure Access for Resource Pool page opens.



3. Select a user or group of users from the Give Access to Username multi-select auto-complete list

4. Click **Add**.



5. Configure each user's access individually by selecting the checkboxes in the Additional Editing Access section.

   Granting Edit access automatically grants the user View access. See *Table 5-3 on page 67* for more detailed information on each option.

6. Click **Save**.

Tracking Demand with Staffing Profiles

Staffing Profiles enable a Project manager to track the forecast demand of Resources, arranged by Skill. Each line in a Staffing Profile tracks a Skill, and optionally a Resource who possesses that Skill. Staffing Profiles can be associated with Organization Units, making them easy to access. *Figure 5-2* illustrates the main features of the Staffing Profile.

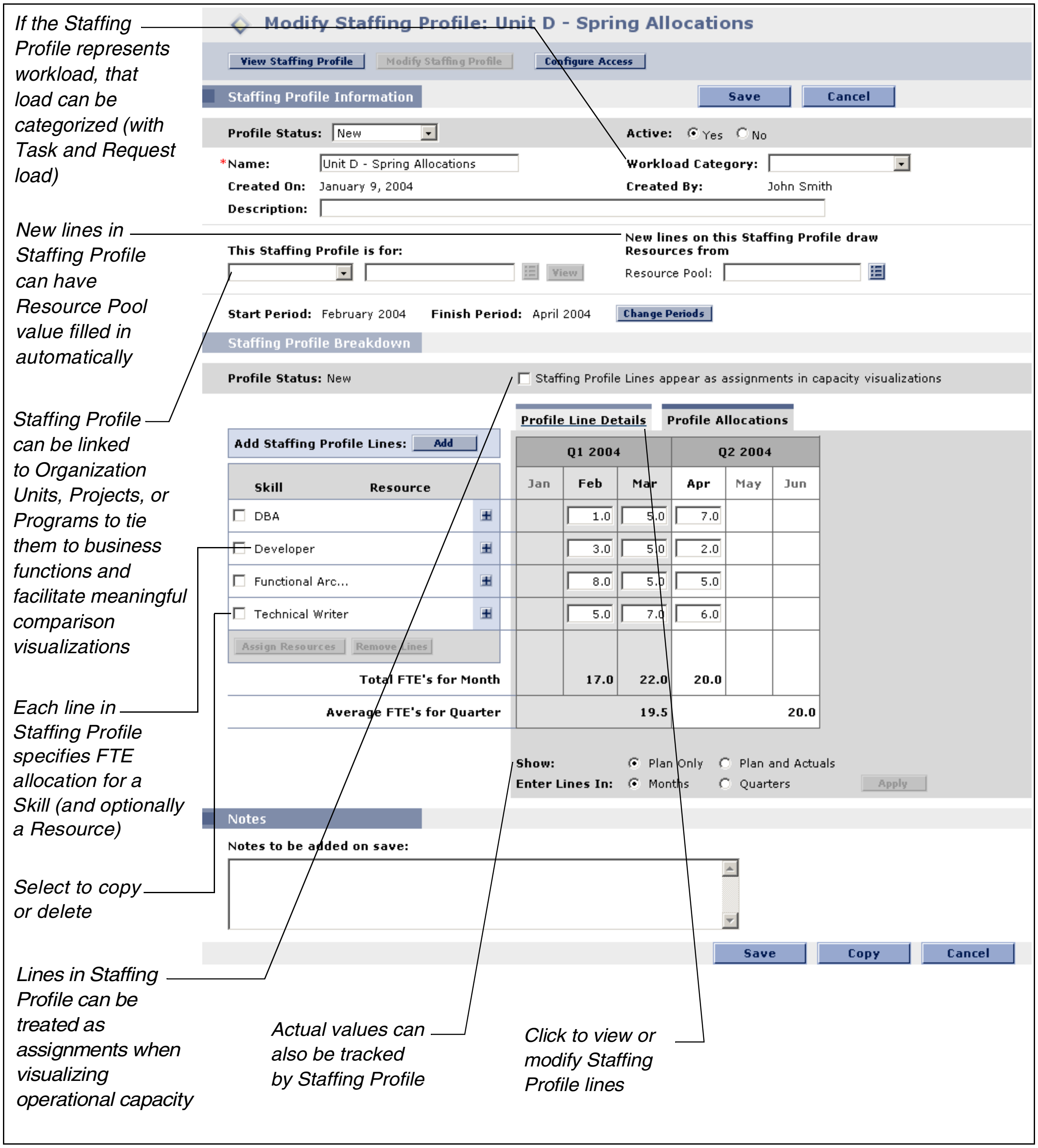


Figure 5-2 Staffing Profile

Table 5-4 describes the key attributes of a Staffing Profile:

Table 5-4. Staffing Profile Attributes

Field	Description
Staffing Profile Information	
Profile Status	The status of the Staffing Profile. Possible values: **New**, **Proposed**, **Under Review**, **In Rework**, **On Hold**, **Approved**, **Rejected**, **Cancelled**, **Closed**
Active	Whether or not the Staffing Profile is active. Inactive Staffing Profiles are not included in Resource Management visualizations.
Name	The name of the Staffing Profile.
Workload Category	The category of work being tracked by the Staffing Profile.
Created On	The date the Staffing Profile was created.
Created By	The user who created the Staffing Profile.
Description	A description of the Staffing Profile.
This Staffing Profile is for	Defines whether the Staffing Profile is associated with an Organization Unit, a Program (if Mercury Program Management is installed), a Mercury Project Management Master Project, or Unspecified.
New lines on this Staffing Profile draw Resources from	When adding a line to the Staffing Profile, the Resource Pool field will be automatically defaulted with this value.
Start Period	The starting period (a fiscal month) for the Staffing Profile.
Finish Period	The ending period (a fiscal month) for the Staffing Profile.
Staffing Profile Breakdown	
Staffing Profile lines appear as assignments in capacity visualizations	If selected, the Full Time Equivalents set in the Staffing Profile will be counted as actual work assignments in Resource Management capacity visualizations.
Skill	The Skill being projected. Each Staffing Profile line can hold one Skill.
Resource	The Resource for the Skill. Each Staffing Profile line can optionally hold one Resource per Skill.
Total FTE's for Month	The total Full Time Equivalents for each month being projected in the Staffing Profile.

Table 5-4. Staffing Profile Attributes

Field	Description
Average FTE's for Quarter	The average Full Time Equivalents per quarter being projected in the Staffing Profile.
Show	Allows you to choose between tracking **Plan Only** values for the Staffing Profile, or **Plan and Actuals**, which enables you to enter actual values alongside the planned values when they become known.
Notes	Any notes on the Staffing Profile itself.

The following sections discuss creating and configuring access to Staffing Profiles in more detail:

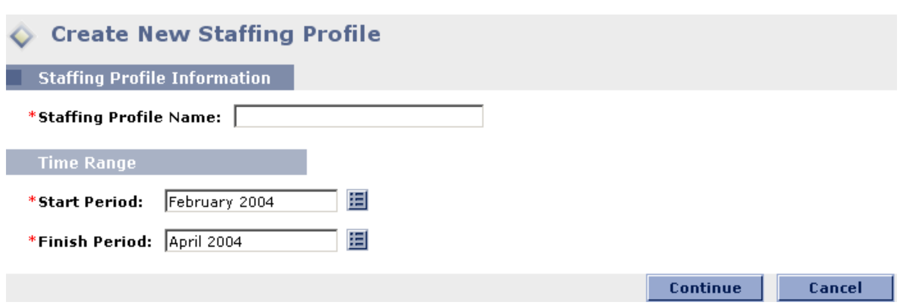
- *Creating a Staffing Profile*
- *Staffing Profile Security*

Creating a Staffing Profile

To create a Staffing Profile:

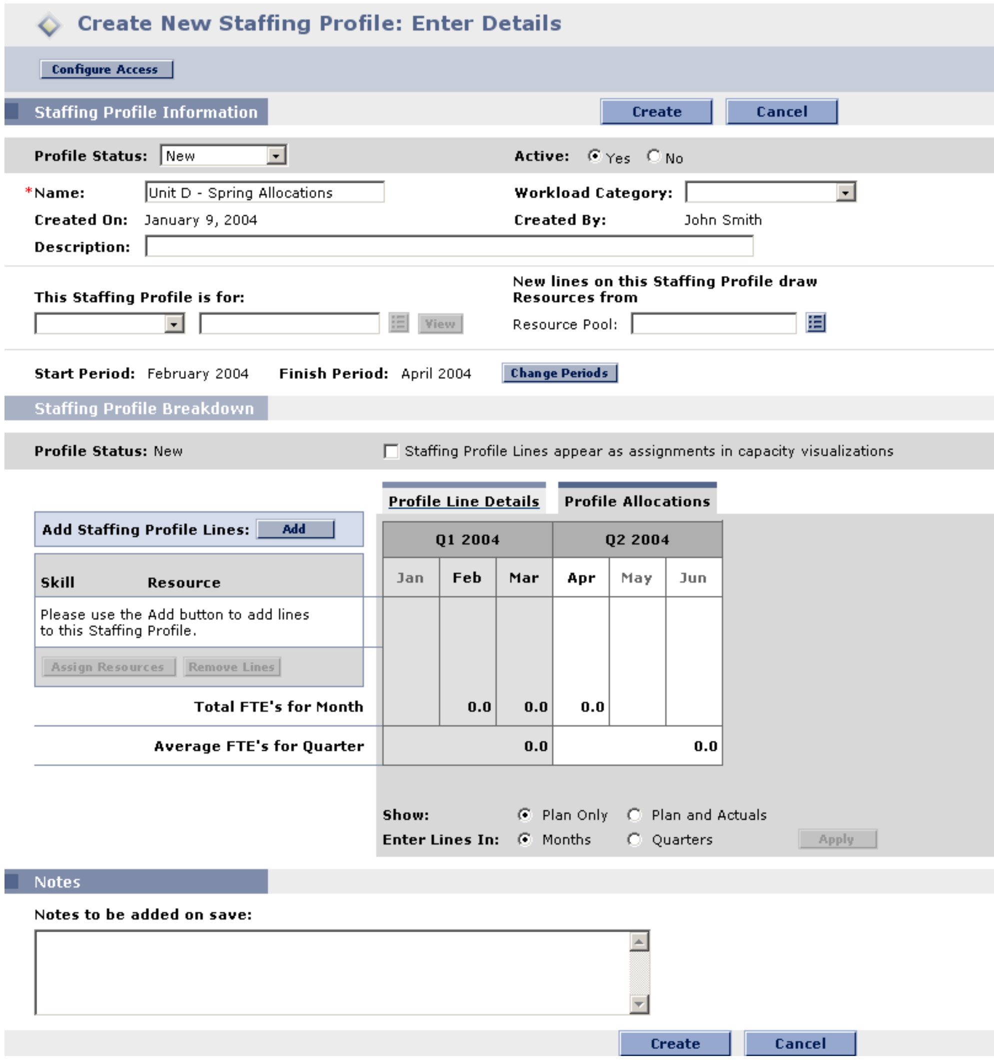
1. Log onto Mercury ITG Center.
2. Select **Create > Staffing Profile** or **Resource > Staffing Profiles > Create a Staffing Profile** from the menu bar.

   The Create a New Staffing Profile page opens.



3. Fill in the Staffing Profile Name and define a Start and Finish Period for the Staffing Profile before clicking **Continue**.

   The next Create a New Staffing Profile: Enter Details page opens.

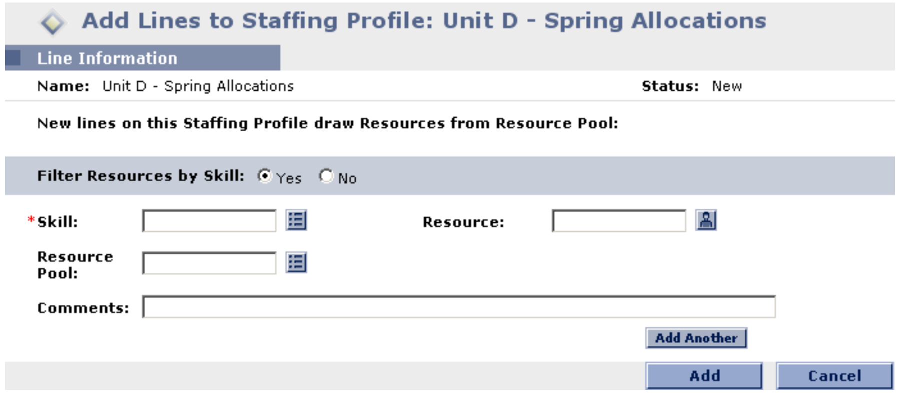


4. Fill in any desired fields in the Staffing Profile Information section.

5. Add lines to the Staffing Profile Breakdown.

   a. Click **Add**.

      The Add Lines to Staffing Profile page opens.



b. Specify a Skill for the Staffing Profile line.

c. (optional) Specify a Resource for the Staffing Profile line.

Only Resources with the selected Skill will appear in the auto-complete list unless you select **No** in the Filter Resources by Skill option.

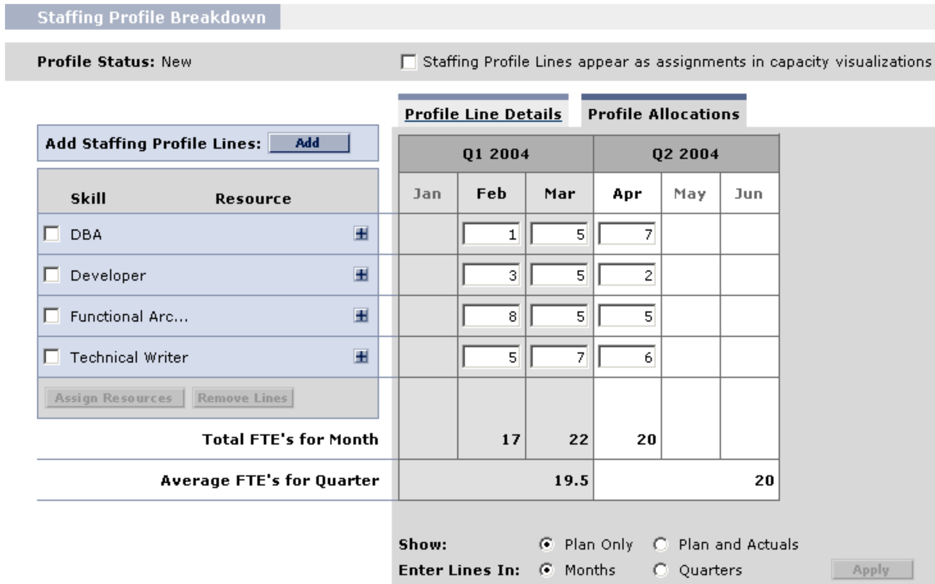
d. Click **Add**.

The Create a New Staffing Profile: Enter Details page reloads with the Staffing Profile lines added.

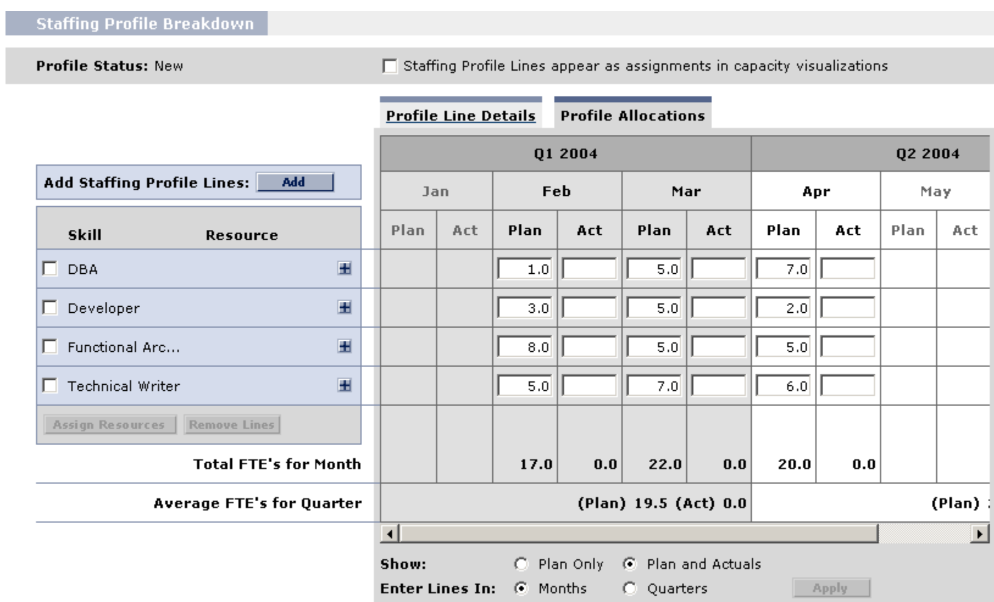
e. Repeat as necessary.

You can add more than one line to the Staffing Profile at a time without returning to the Create a New Staffing Profile: Enter Details page by clicking **Add Another** once you have filled in the values for one line.

6. Specify Full-Time Equivalent values for each Staffing Profile line.

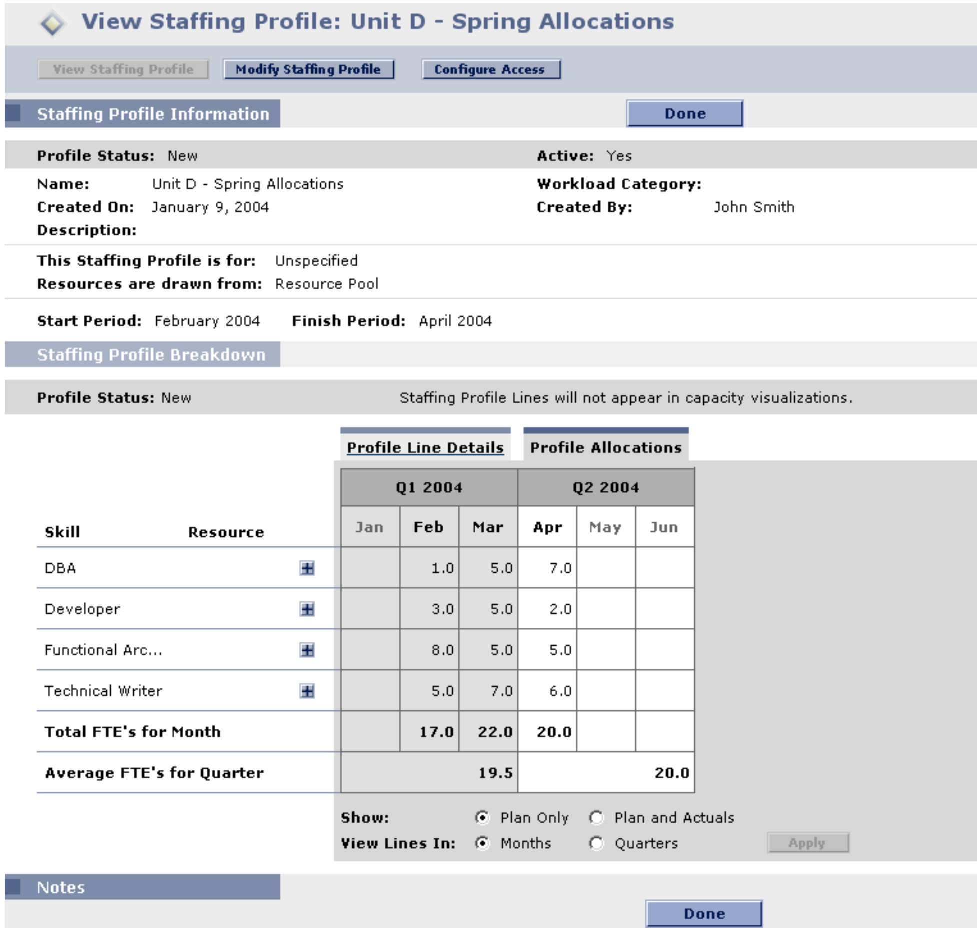


You can choose to track actual values alongside the planned values in each Staffing Profile line, for comparison purposes. Select the Show Plan and Actuals radio button and click **Apply** to track actual values.



7. Click **Create**.

The Staffing Profile is created and the View Staffing Profile page opens.



Staffing Profile Security

Access to a Staffing Profile is controlled primarily through Access Grants set in the Security Group definitions. Additionally, the user who creates a Staffing Profile can specify a list of users who can view it, edit its basic information, edit its lines, or edit its security. The following sections describe the security surrounding Staffing Profiles in more detail:

- *Staffing Profile Access Grants*
- *Staffing Profile Configure Access Page*
- *Using the Configure Access Page*

Staffing Profile Access Grants

Users are linked to Access Grants through the Security Group they are a part of. The Access Grants related to Staffing Profiles are discussed in more detail in *Table 5-5*. Without these Access Grants, a user cannot view or edit a Staffing Profile regardless of whether they are specified in the list on the Staffing Profile's Configure Access page. For more information on Access Grants and Security Groups, see the Security Model Guide and Reference.

Table 5-5. Staffing Profile Access Grants

Access Grant	Description
View Staffing Profiles	The user can view any Staffing Profile for which they are on the specified View or Edit list.
View All Staffing Profiles	The user can view any Staffing Profile in the system.
Edit Staffing Profiles	The user can edit any Staffing Profile for which they are on the specified Edit list.
Create Staffing Profiles	The user can create new Staffing Profiles. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles Access Grant.
Edit All Staffing Profiles	The user can edit any Staffing Profile in the system.
Update Staffing Profiles Status	The user can update the Profile Status, but nothing else. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles Access Grant.
Approve Staffing Profiles	The user can set the Profile Status to **Approved**, but nothing else. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles Access Grant.

Staffing Profile Configure Access Page

The Configure Access page for a Staffing Profile is used to grant additional editing access to the Staffing Profile to each user on the list individually. All users listed on the Configure Access page minimally have viewing access.

Note

Without the proper Access Grants, a user cannot view or edit a Staffing Profile regardless of whether they are specified in the list on the Staffing Profile's Configure Access page. See *"Staffing Profile Access Grants"* on page 76 for more detailed information.

The Configure Access page options are discussed in more detail in *Table 5-6*.

Table 5-6. Security Options for Staffing Profile Configure Access Page

Option	Description
View Access	The user can view the Staffing Profile but not edit its information. Any user listed has View access.
Edit Basic Staffing Profile Information	The user can edit the fields in the Staffing Profile Information section, but not the actual Staffing Profile Breakdown, nor change periods.
Edit Plan	The user can edit the Staffing Profile Breakdown, but not the fields in the Staffing Profile Information section.
Edit Security	The user can use the Configure Access page to edit viewing or editing security for the Staffing Profile.

Using the Configure Access Page

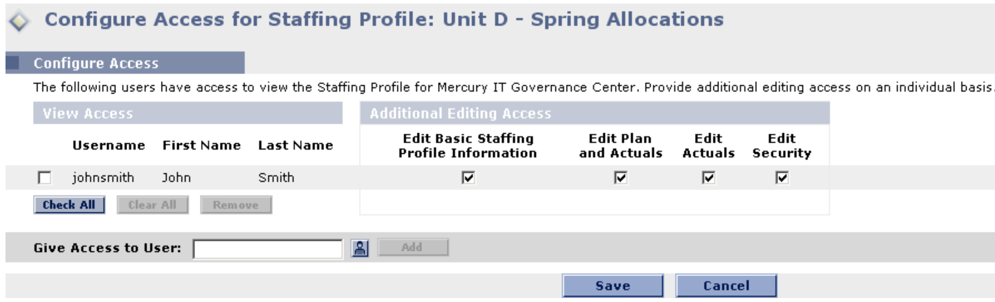
To set up a list of users with View or Edit access to a Staffing Profile:

1. Open the View Staffing Profile page.

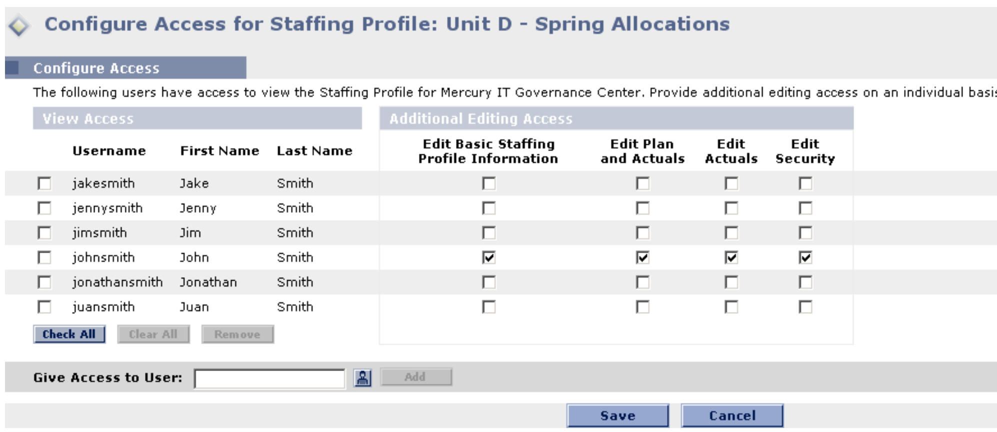
   If you have permission to modify the Staffing Profile, the **Modify Staffing Profile** and **Configure Access** buttons will be enabled.

2. Click **Configure Access**.

   The Configure Access for Staffing Profile page opens.



3. Add a user or group of users to the list by selecting from the Give Access to Username multi-select auto-complete list and clicking **Add**.



4. Configure each user's access individually by selecting the checkboxes in the Additional Editing Access section.

   Granting Edit access automatically grants the user View access. See *Table 5-6* for more detailed information on each option.

5. Click **Save**.

Analyzing Resource Pools

Resource capacity planning typically involves the use of both Resource Pools and Staffing Profiles. The projected capacity of Resources can be tracked with Resource Pools, while anticipated demand is tracked with Staffing Profiles. Comparing a Resource Pool to a Staffing Profile can yield valuable insight on future Resource deployments as they are weighed against planned Resource capacity.

The following sections discuss viewing Resource Pools and comparing Resource Pools to Staffing Profiles in more detail:

- *Viewing Resource Pools*
- *Comparing Resource Pools to Staffing Profiles*

Viewing Resource Pools

Resource Pools are accessed most easily from the Resource Pool List Portlet.

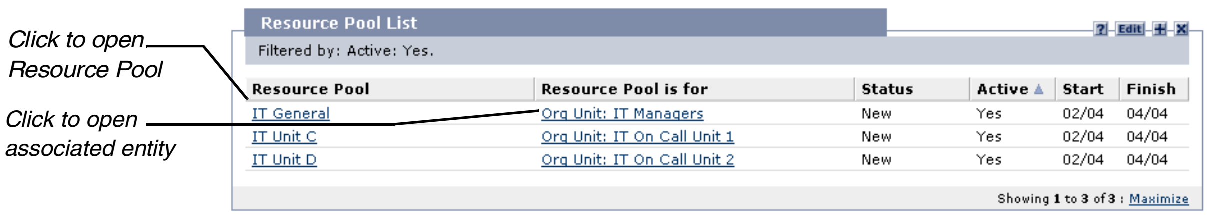


Figure 5-3 Resource Pool List Portlet

Users with View or Edit Resource Pools Access Grants can add the Resource Pool List Portlet to their Dashboard.

You can also reach Resource Pools by using the Search Resource Pools page. The Search Resource Pools page is opened by selecting **Search > Resource Pools** from the menu bar.

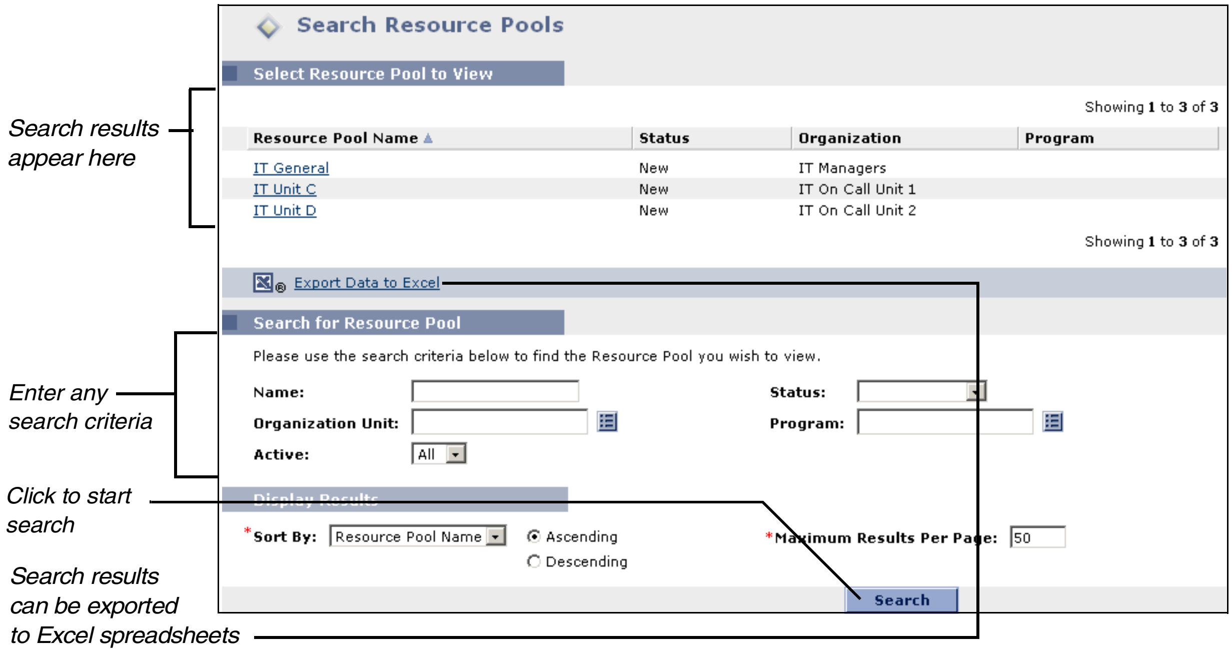


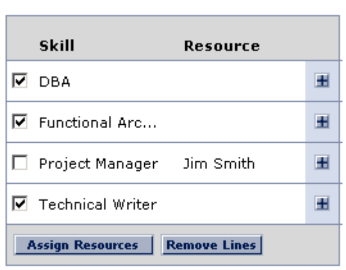
Figure 5-4 Search Resource Pools page

Modifying Resource Pool Lines

Groups of Resource Pool lines can be modified simultaneously from the Modify Resource Pool page.

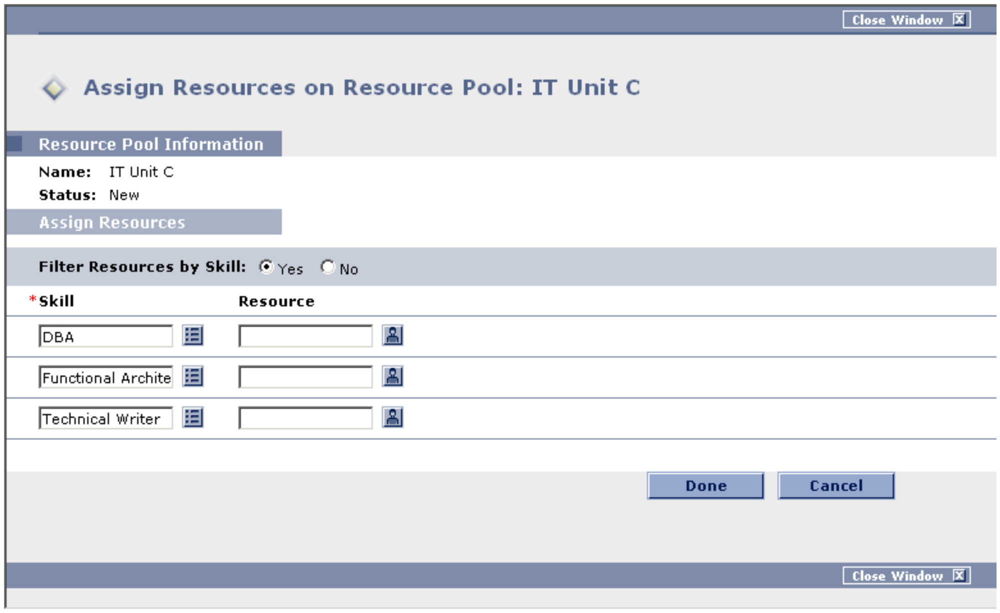
To modify a group of Resource Pool lines:

1. Open the Resource Pool you wish to modify.
2. Scroll down to the Resource Pool Breakdown section.
3. Select the checkboxes next to the Resource Pool lines you wish to modify.



4. Click **Assign Resources**.

The Assign Resources on Resource Pool window opens.



5. Modify the Resource Pool lines as desired and click **Done**.

   You can either change the Skill or Resource.

6. Click **Save**.

   The Resource Pool is saved with the changes.

Comparing Resource Pools to Staffing Profiles

The Analyze Resource Pools page provides a way to assess planned load on Resource Pools by directly comparing the projected demand in a Staffing Profile or Profiles to projected capacity in a Resource Pool or Pools. *Figure 5-5* shows the Analyze Resource Pools page and some of its key features.

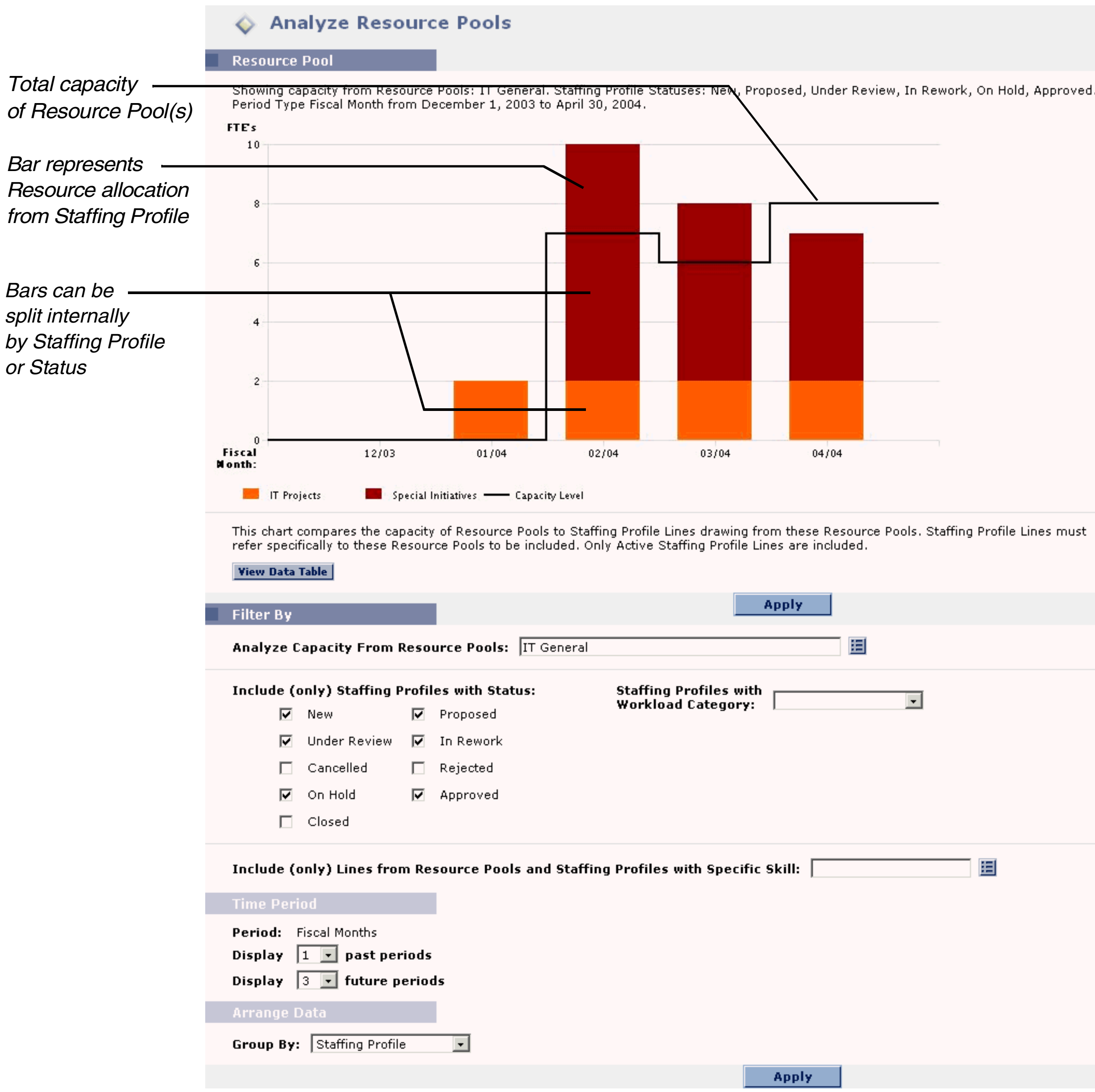


Figure 5-5 Analyze Resource Pools page

The Analyze Resource Pools page can be filtered using the parameters described in *Table 5-7*.

Table 5-7. Analyze Resource Pools page - Parameters

Field	Description
Filter By	
Analyze Capacity from Resource Pools	A multi-select auto-complete field that selects the Resource Pool or Pools you wish to analyze.
Include (only) Staffing Profiles with Status	Selects Staffing Profiles with the specified Statuses to display.
Staffing Profiles with Workload Category	Selects Staffing Profiles of a specific Workload Category to display.
Include (only) Lines from Resource Pools and Staffing Profiles with Specific Skill	A multi-select auto-complete field that selects a Skill or set of Skills to display from the Resource Pools and Staffing Profiles being analyzed.
Time Period	
Period	Display only. Shows the time period being used by the Analyze Resource Pools page.
Display (x) past periods	Selects up to 20 time periods before the current date to include in the Analyze Resource Pools page. Useful for viewing historical trends.
Display (x) future periods	Selects up to 20 time periods after the current date to include in the Analyze Resource Pools page.
Arrange Data	
Group By	Determines whether to display the results by **Staffing Profile** or **Staffing Profile Status**.

To get a breakdown of total Resource capacity vs. load by Staffing Profile, click **View Data Table**. The Analyze Resource Pools Breakdown Table, pictured in *Figure 5-6*, opens in a new window.

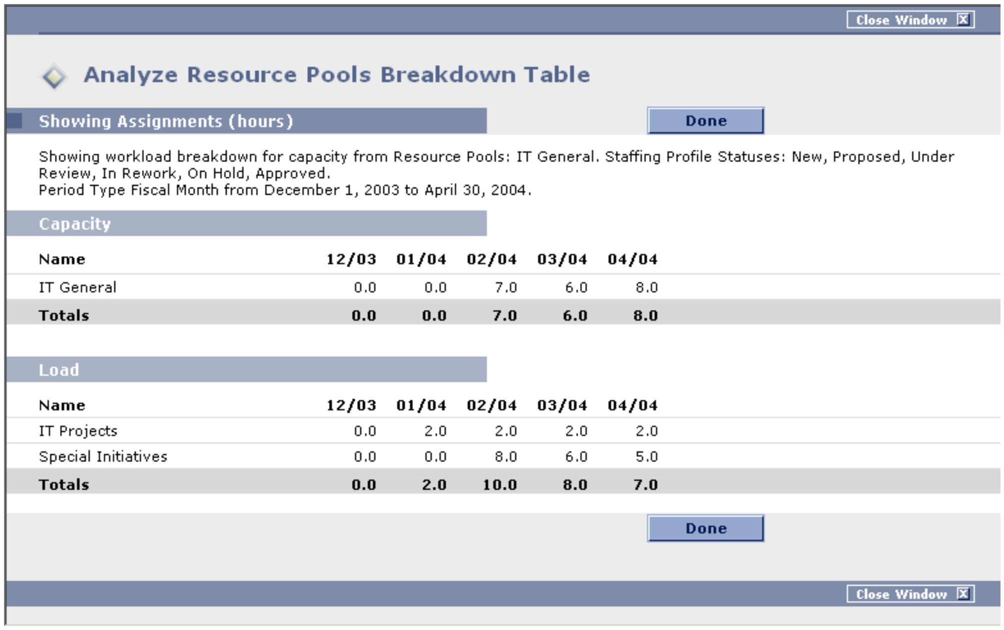


Figure 5-6 Analyze Resource Pools Breakdown Table

The Analyze Resource Pools Breakdown Table can be used to obtain a more numerically precise breakdown of projected load distribution. The figures can also be copied and pasted into a spreadsheet program like Microsoft Excel for further manipulation.

The same Resource Pool analysis functionality is available as a Portlet. The Analyze Resource Pools Portlet is pictured in *Figure 5-7*.

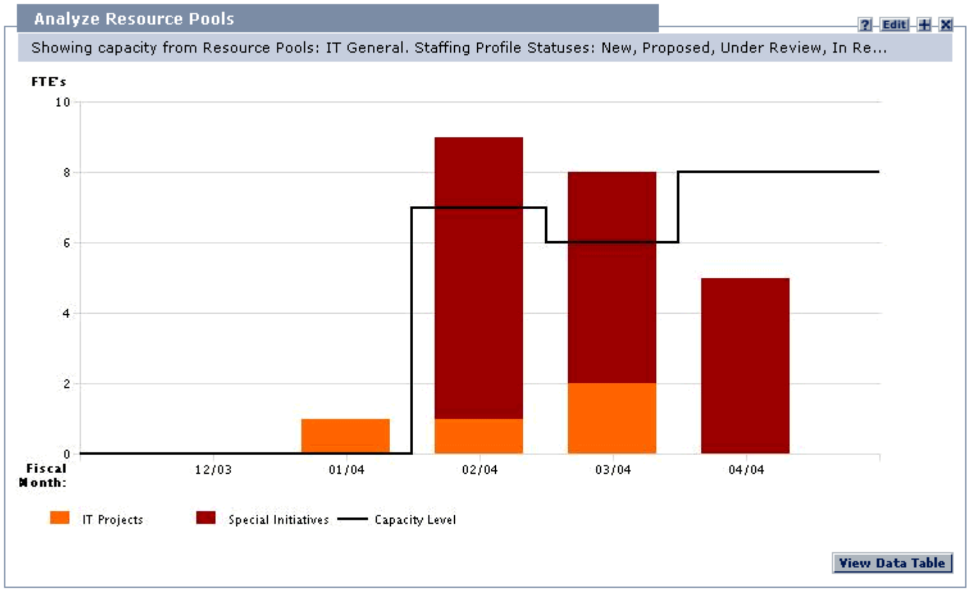


Figure 5-7 Analyze Resource Pools Portlet

You can have multiple instances of this Portlet on your Dashboard, for keeping track of different Resource Pools.

Analyzing Staffing Profiles

Staffing Profiles, used to project and track future Resource demand, can be a useful Resource capacity planning tool. Staffing Profiles that are associated with Projects can be compared with those Projects to see how well they match up in terms of Resource allocation and actual workload.

The following sections discuss viewing Staffing Profiles and comparing Staffing Profiles to Project assignments in more detail:

- *Viewing Staffing Profiles*
- *Comparing a Project's Assignments to its Staffing Profile*

Viewing Staffing Profiles

Staffing Profiles can be reached most easily from the Staffing Profile List Portlet.

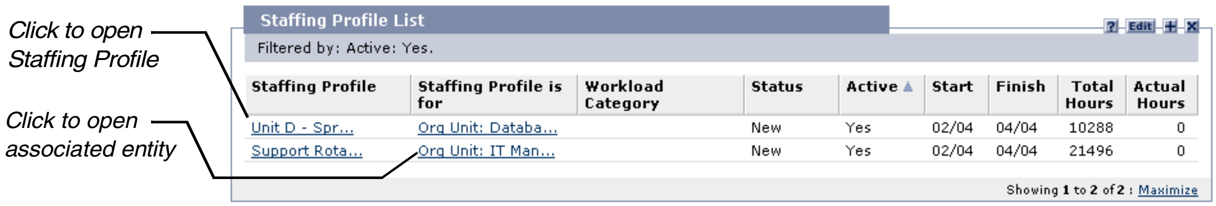


Figure 5-8 Staffing Profile List Portlet

Users with the View or Edit access to Staffing Profiles can add the Staffing Profile List Portlet to their Dashboard.

You can also reach Staffing Profiles by using the Search Staffing Profiles page. The Search Staffing Profiles page is opened by selecting **Search > Staffing Profiles** from the menu bar. *Figure 5-9* shows the the Search Staffing Profiles page and some of its key features.

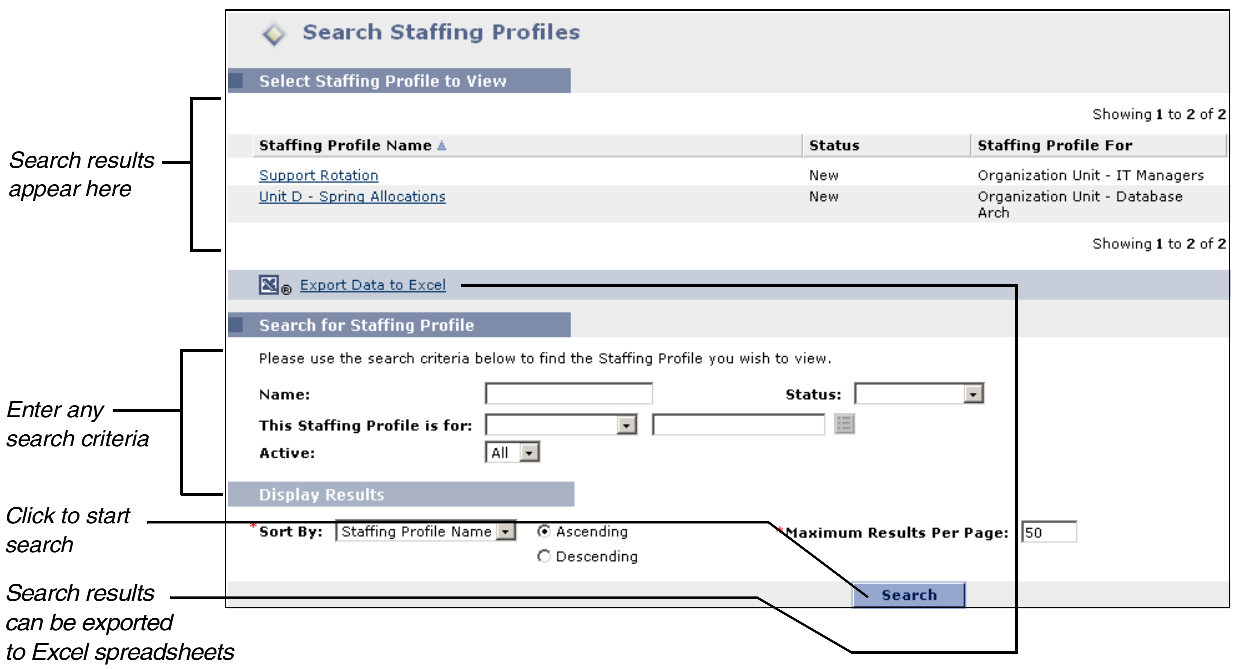


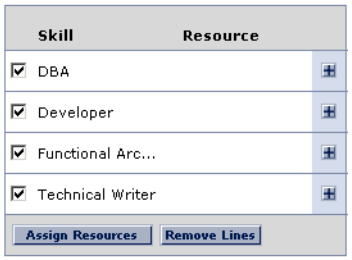
Figure 5-9 Search Staffing Profiles page

Modifying Staffing Profile Lines

Groups of Staffing Profile lines can be modified simultaneously from the Modify Staffing Profile page.

To modify a group of Staffing Profile lines:

1. Open the Staffing Profile you wish to modify.
2. Scroll down to the Staffing Profile Breakdown section.
3. Select the checkboxes next to the Staffing Profile lines you wish to modify.



4. Click **Assign Resources**.

   The Assign Resources on Staffing Profile window opens.

5. Modify the Staffing Profile lines as desired and click **Done**.

You can either change the Skill or Resource.

6. Click **Save**.

   The Staffing Profile is saved with the changes.

Comparing a Project's Assignments to its Staffing Profile

The Compare Project Assignments to Staffing Profile Lines page compares capacity (as the set of active Staffing Profiles for a Project) to assignments within the Project. It can be used to monitor compliance of the Project Plan and actuals to organizationally-agreed-upon staffing levels for the Project. Open it by selecting **Resource > Analyze > Project Assignments to Staffing Profile Lines Comparison** from the menu bar. *Figure 5-10* shows the Compare Project Assignments to Staffing Profile Lines page and some of its key features.

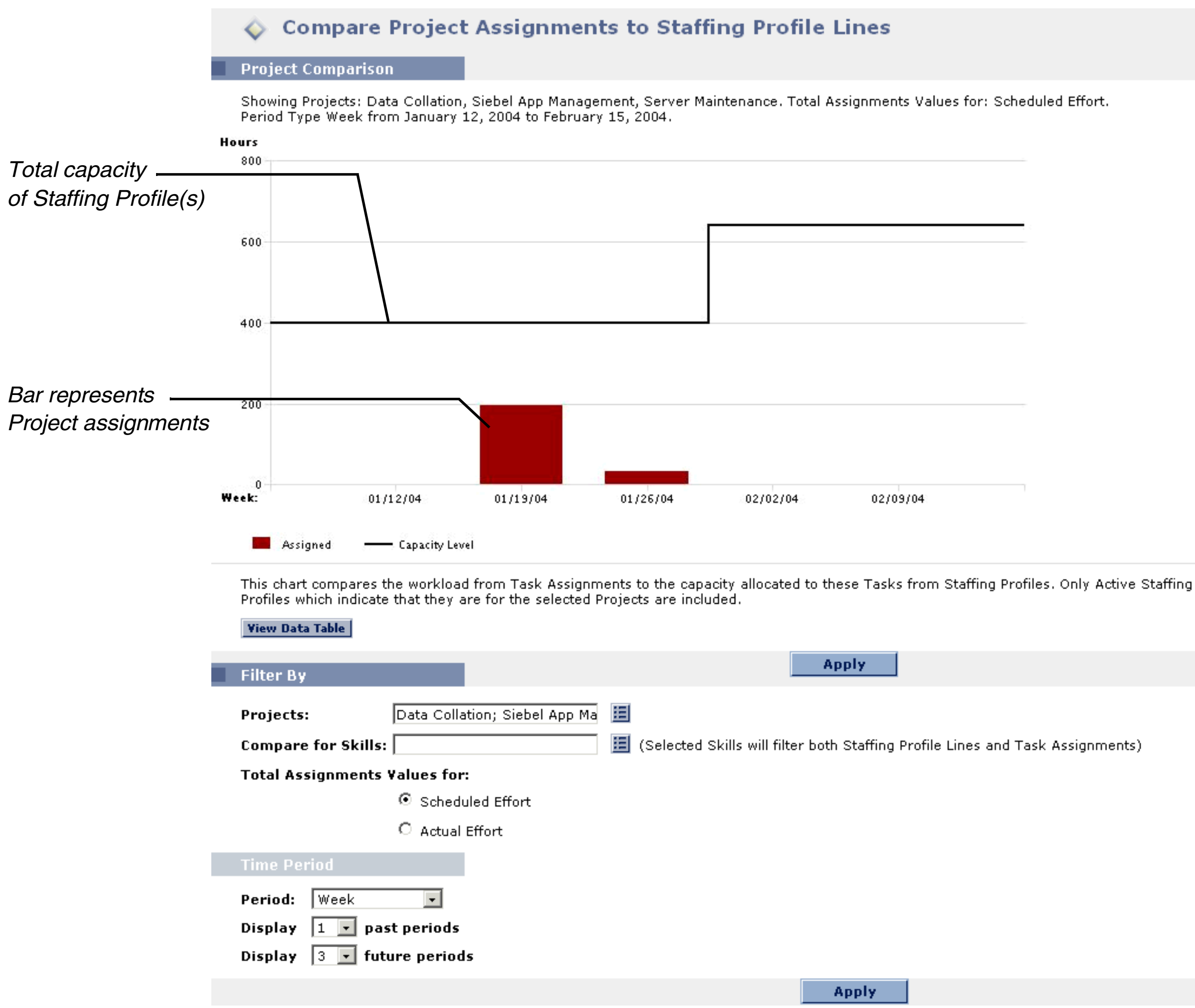


Figure 5-10 Compare Project Assignments to Staffing Profile Lines page

The Compare Project Assignments to Staffing Profile Lines page can be filtered according to the parameters described in *Table 5-8*.

Table 5-8. Compare Project Assignments to Staffing Profile Lines page - parameters

Field	Description
Filter By	
Projects	A multi-select auto-complete field that selects the Projects to display in the Compare Project Assignments to Staffing Profile Lines page. All Staffing Profile lines from active Staffing Profiles associated with these Projects are included automatically in the visualization.
Compare for Skills	A multi-select auto-complete field that selects the Skills specified in both Staffing Profile lines and Task assignments which will be displayed.
Total Assignments Values for	Sets whether to display **Scheduled** or **Actual Effort** in the Compare Project Assignments to Staffing Profile Lines page.
Time Period	
Period	Sets the time period being used by the Compare Project Assignments to Staffing Profile Lines page.
Display (x) past periods	Selects up to 20 time periods before the current date to include in the Compare Project Assignments to Staffing Profile Lines page. Useful for viewing historical trends.
Display (x) future periods	Selects up to 20 time periods after the current date to include in the Compare Project Assignments to Staffing Profile Lines page.

To get a breakdown of total Staffing Profile capacity vs. Project assignments, click **View Data Table**. The Compare Project Assignments to Staffing Profile Lines Breakdown Table, pictured in *Figure 5-11*, opens in a new window.

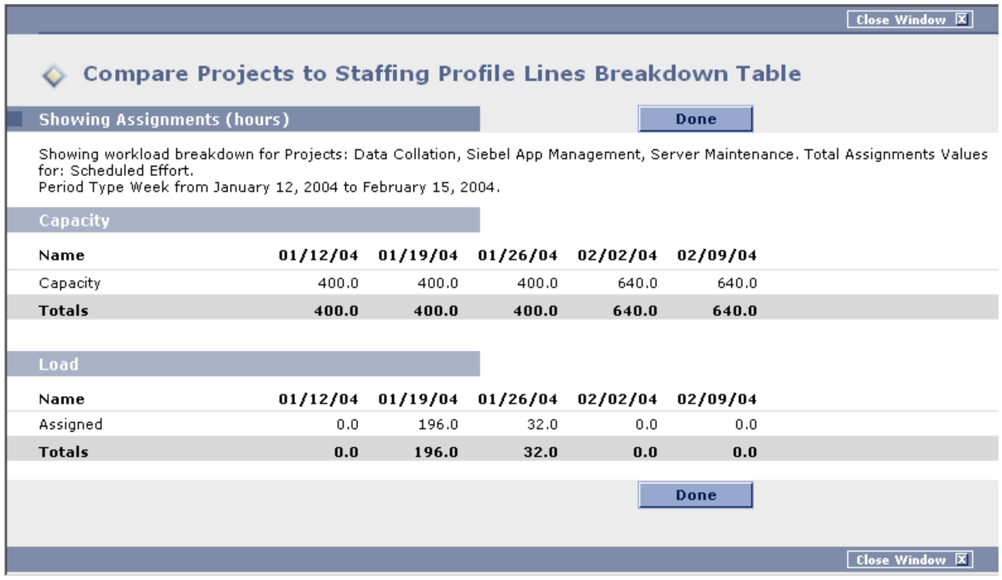


Figure 5-11 Compare Projects to Staffing Profile Lines Breakdown Table

The Compare Project Assignments to Staffing Profile Lines Breakdown Table can be used to obtain a breakdown of capacity vs. Project assignment distribution. The figures can also be copied and pasted into a spreadsheet program like Microsoft Excel for further manipulation.

The same Staffing Profile analysis functionality is available as a Portlet. The Compare Project Assignments to Staffing Profile Lines Portlet is pictured in *Figure 5-12*.

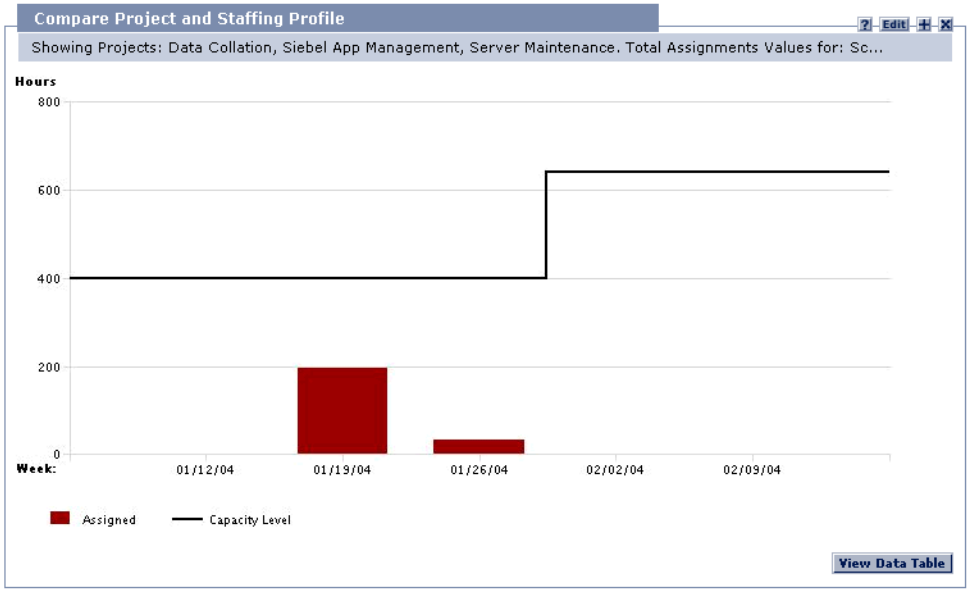


Figure 5-12 Compare Project Assignments to Staffing Profile Lines Portlet

You can have multiple instances of this Portlet on your Dashboard, for keeping track of different Projects and their associated Staffing Profiles.

Chapter 6
Using Resource Management for Operational Planning

This chapter explains how to use Resource Management functionality to perform operational planning tasks and analyze current Resource usage.

The following topics are covered:

- *Operational Planning Overview*
- *Configuring Requests for Resource Management*
- *Assigning Requests*
- *Assigning Tasks*
- *Overriding Scheduled and Actual Values*
- *Viewing Work Items*
- *Visualizing Assignments*

Operational Planning Overview

Resource Management can be used for operational Resource planning, which concerns itself with how Resources are being used for current work. Operational Resource planning using Resource Management can consist of the following activities:

- Viewing present Resource usage
- Determining areas of over-allocation and under-allocation of workload among Resources (load balancing)
- Displaying personal workload for the present and near future

Whereas Resource capacity planning typically involves only management-level personnel and higher, operational Resource planning concerns two main sets of users:

- **Managers** — Use Resource Management to analyze Resource workload for their teams and take the appropriate actions
- **Team members** — View their own workload with handy visualizations and spot potential trouble areas

Workload tracked in Resource Management can consist of either Project Tasks or Requests.

Note

Assignments made to Resources in Staffing Profile lines can also be tracked as operational load if so desired. See *"Tracking Demand with Staffing Profiles"* on page 68 for more information on Staffing Profiles.

Configuring Requests for Resource Management

In order to consider Requests as Work Items to be tracked in Resource Management, you must associate Work Item fields with them. See *"Setting Up Request Work Item Fields"* on page 31 for more detailed information on associating Work Item fields with Requests.

Note

In order to view or use Requests, you must have a Demand Management license.

A Request Work Item features the fields described in *Table 6-1*.

Table 6-1. Request Work Item fields

Field	Description
Workload/Non Workload	Whether the Request Work Item is counted as load against the assigned Resource's capacity.
Workload Category	The reporting category of the Request Work Item.
Scheduled Start Date	The scheduled start date for the Request Work Item.

Table 6-1. Request Work Item fields

Field	Description
Scheduled Finish Date	The scheduled finish date for the Request Work Item.
Scheduled Duration	The scheduled duration for the Request Work Item.
Scheduled Effort	The scheduled effort for the Request Work Item.
Assigned Resource	(Already present as the Assigned User)
Skill	The Skill being used by the Assigned Resource. This defaults to the Primary Skill unless otherwise specified.
% Complete	(Automatically updated by Request Workflow)
Actual Start Date	The actual start date for the Request Work Item.
Actual Finish Date	The actual finish date for the Request Work Item.
Actual Duration	The actual duration for the Request Work Item.
Actual Effort	The actual effort for the Request Work Item.

These Work Item fields have Resource Management interaction built into them through Request Type Rules and other built-in system functionality. For more information on Request Type Rules, see Configuring a Request Resolution System.

The following Work Item fields can be safely customized with minimal impact to Resource Management functionality:

- Workload/Non Workload (if set to **No**, the Request is not counted as workload)
- Workload Category

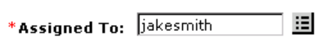
Note

Certain Work Item fields have strong functional defaults, such that altering the way they work could have unintended side effects. The following Work Item fields can have Rules that read their values, but generally should not be altered unless you need to specify effort other than full time:

- Scheduled Duration
- Actual Duration
- Scheduled Effort
- Actual Effort

Assigning Requests

Requests are assigned using Demand Management. Setting a Resource as the Assigned To user for a Request automatically books that Resource for the Request.



Booking a Resource for a Request also books that Resource's Primary Skill. If the Resource has a different Skill you wish to book, simply change the value in the Skill field.

The Request is counted as load against the Resource's capacity and will show up in Resource Management visualizations, such as the two-week Resource Gantt chart pictured in *Figure 6-1*. If the Workload flag is enabled, the Request will show up in load histograms.

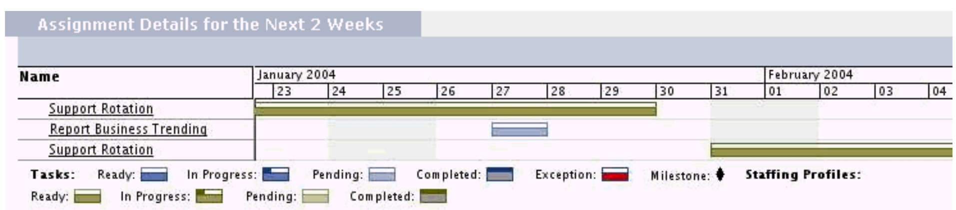


Figure 6-1 Resource Assignment Gantt chart

To view your two-week Resource Gantt chart, select **Settings > View my Resource Information** from the menu bar in the standard interface.

Note

To view a Gantt chart, you must have a license for Project Management.

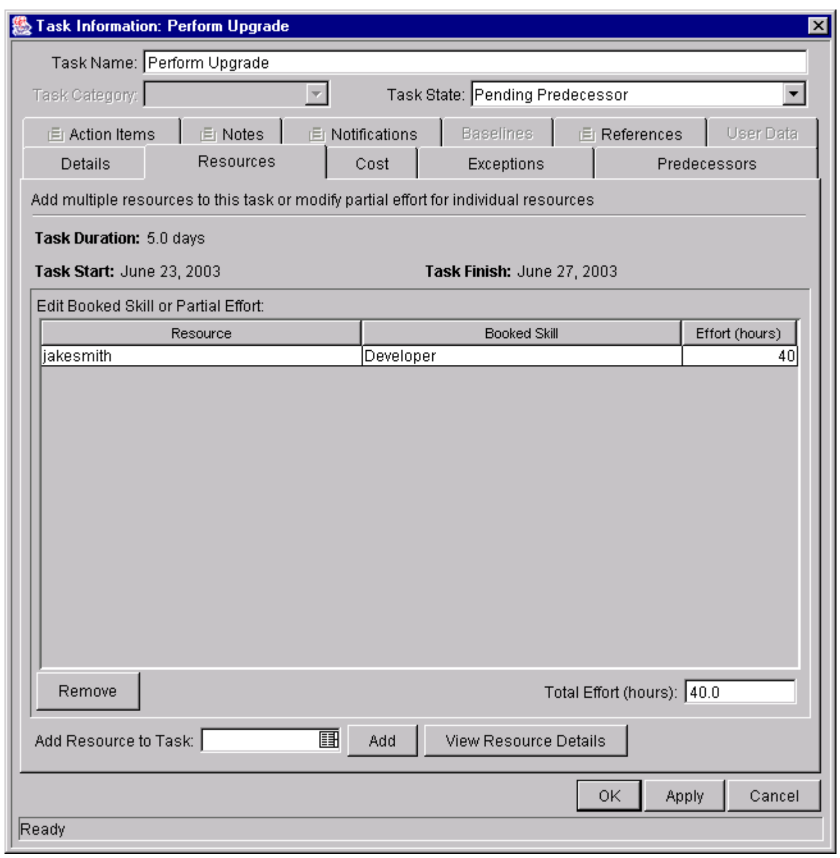
Assigning Tasks

Tasks are assigned in the Workbench. Setting a Resource as the Resource for a Task automatically books that Resource for the Task.

Booking a Resource for a Task also books that Resource's Primary Skill.

To book a Resource for a Skill other than their Primary Skill:

1. Open the Project in the Workbench.
2. Open the Task Information window for the Task you want.
3. Click on the **Resources** tab.



4. Select a different Skill from the Skill auto-complete list.

5. Click **Apply** to save changes and continue to work in the Task Information window. Click **OK** to save changes and close the Task Information window.

Assigned Tasks are automatically counted as load against a Resource's capacity, and will show up in Resource Management visualizations such as the two-week Resource Gantt chart pictured in *Figure 6-1*.

The following sections discuss more advanced topics in Resource assignment:

- *Booking Multiple Resources on a Task*
- *Microsoft Project Integration*

Booking Multiple Resources on a Task

A Task can be assigned to more than one Resource. Assigning multiple Resources to a Task results in the following Resource Management behaviors:

- Each assigned Resource is booked for the Task's entire Scheduled Duration. The Scheduled Effort is adjusted proportionately. For example, a one-day duration Task, with a 10-hour workday and two Resources assigned, would default to 20 hours of effort.
- Each assigned Resource is booked for their Primary Skill.

To assign multiple Resources to a Task:

1. Open the Project in the Workbench.
2. In the Project Plan Panel, enter the username of each Resource in the Task line's Resource field, separated by semicolons.
    - Alternatively, in the Project Plan Panel, use the Task line's Resource auto-complete field to assign multiple Resources.
    - As another alternative, open the Task's Task Information window and click on the **Resources** tab.
        i. Add a new Resource to the Task by selecting one from the Add Resource to Task auto-complete list and clicking **Add**.

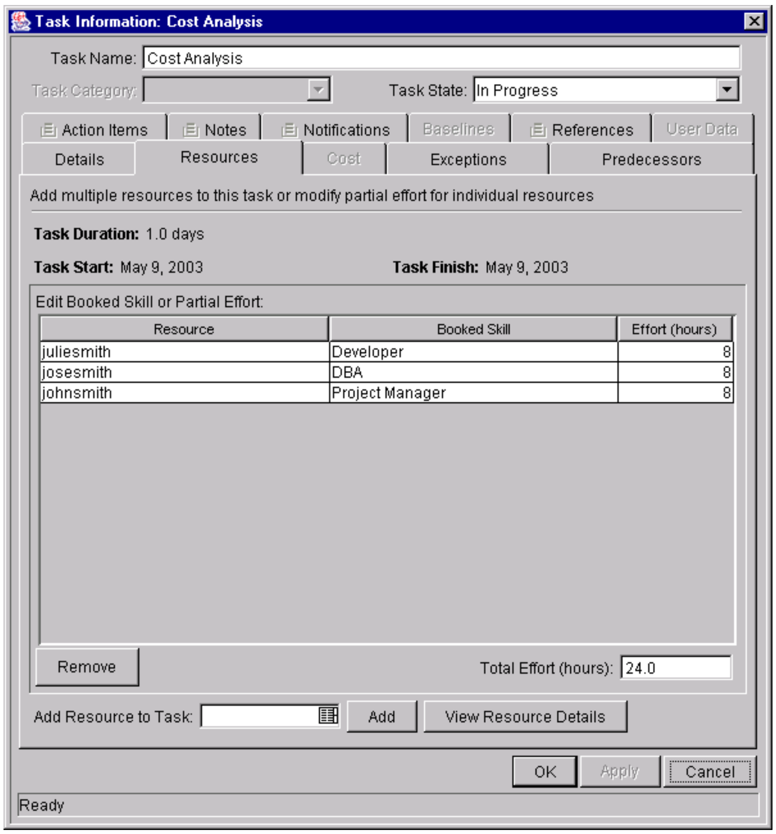
        ii. Click **Apply** to save changes and continue to work in the Task Information window. Click **OK** to save changes and close the Task Information window.
3. Click **Save**.

The values for each individual Resource's Scheduled Effort and Skill can be altered in the Task Information window.

To change the booked Skill or Scheduled Effort for multiple Resources assigned to a Task:

1. Open the Project in the Workbench.

2. Open the Task Information window for the Task you want and click on the **Resources** tab.



3. For each Resource, select a Skill from the auto-complete list in the Booked Skill column.

4. For each Resource, enter a value in the Effort numeric field.

   The Total Effort (hours) field updates itself automatically when **Apply** is clicked. If Total Effort is altered directly, the partial effort of each Resource is adjusted proportionately.

5. (optional) Add a new Resource to the Task by selecting one from the Add Resource to Task auto-complete list and clicking **Add**.

6. Click **Apply** to save changes and continue to work in the Task Information window. Click **OK** to save changes and close the Task Information window.

Microsoft Project Integration

For multi-Resource Tasks, Resource Units in Microsoft Project are imported, and are used to determine the Scheduled Effort/Resource on corresponding Project Management Tasks.

Overriding Scheduled and Actual Values

Work Items (both Tasks and Requests) have fields for the Scheduled and Actual values for:

- Start Date
- Finish Date
- Duration
- Effort

The Scheduled fields are related to each other in the following ways:

> Scheduled Duration = Scheduled Finish Date - Scheduled Start Date - (Global Calendar Non-Working Days)

> Scheduled Effort = Scheduled Duration * (Working hours in a day defined from Global Calendar)

The following sections discuss the implications of altering the Scheduled or Actual values for the above Work Item fields:

- *Scheduled Value Field Relationships*
- *Actual Value Field Relationships*

Scheduled Value Field Relationships

The Scheduled Duration and Scheduled Effort for a Work Item are automatically calculated in the following manner:

Scheduled Duration = Scheduled Finish Date - Scheduled Start Date - (Global Calendar Non-Working Days)

Scheduled Effort = Scheduled Duration * (Working hours in a day defined from Global Calendar

Each of these fields automatically updates the other:

- If the Scheduled Start Date is changed by the user, then the Scheduled Finish Date is automatically updated to reflect the Scheduled Duration.
- If the Scheduled Finish Date is changed by the user, then the Scheduled Duration is automatically updated and Scheduled Effort is recalculated.
- If the Scheduled Duration is changed by the user, then the Scheduled Finish Date is automatically updated to reflect the Scheduled Duration, and Scheduled Effort is recalculated.
- For a Work Item with multiple Resources, the total Scheduled Effort is simply the sum of all Resources' Scheduled Effort. If the total Scheduled Effort is changed by the user, each assigned user's Scheduled Effort is changed proportionately. (If the total is doubled, for example, each Resource's Scheduled Effort will also double.) Concordantly, if an assigned user's Scheduled Effort is updated, total Scheduled Effort is recalculated automatically.

Note

Changes to Scheduled Effort values do not have a "backstream" effect. Updating only the Scheduled Effort field will not change the Scheduled Duration, which is always derived from the Scheduled Start and Finish values. This allows a Task to be assigned at less than full time.

Actual Value Field Relationships

Work Item Actual field values are captured in the following ways:

- Start Date — When the Work Item is started (Task is set to **In Progress** or Request is submitted)
- Finish Date — When the Work Item is completed (Task is set to **Completed** or Request is closed)
- Duration — Calculated as Actual Finish Date - Actual Start Date - (Global Calendar Non-Working Days)

- Effort — Calculated as Total Scheduled Effort * (Actual Duration / Scheduled Duration)

If the Actual Duration is changed by the user, then the Actual Effort is automatically updated.

Note

Though the Actual Effort field can be updated independently, changes to Actual Effort do not have a "backstream" effect. Updating only the Actual Effort field will not change the Actual Duration.

To prevent the system from overriding a manually-updated Actual Effort value, make sure that you have updated the Actual Duration or Actual Start/Finish Dates before entering the new Actual Effort value.

Viewing Work Items

Once Work Items have been assigned, there are several ways for Resources to view and update their workload from the standard interface. The following sections discuss quick and convenient ways for Resources to view Work Items that have been assigned to them:

- *My Tasks Portlet*
- *My Requests Portlet*
- *Personal Load and Capacity Visualizations*

My Tasks Portlet

Task Work Items can be viewed and updated from the My Tasks Portlet.

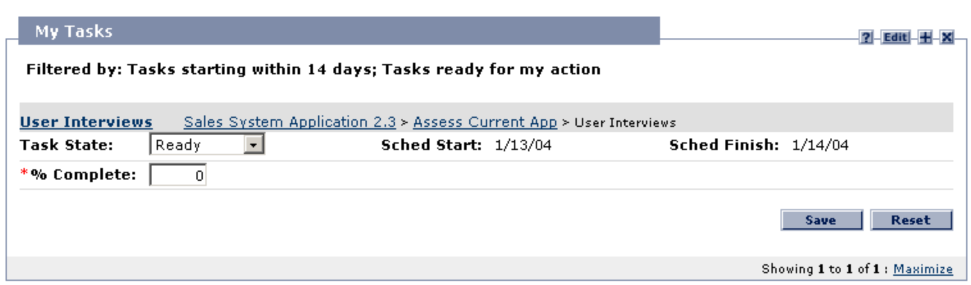


Figure 6-2 My Tasks Portlet

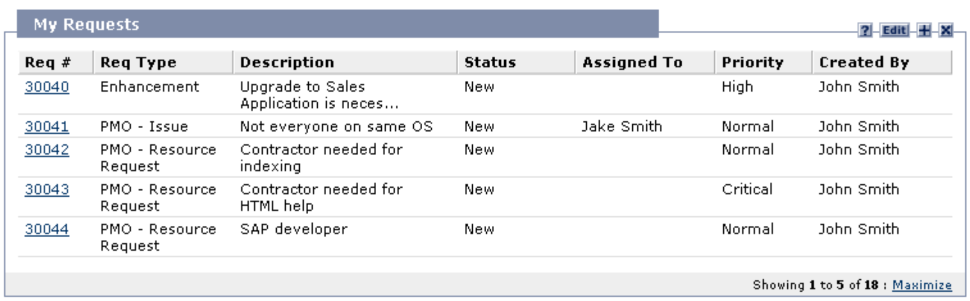
Resources with a Project Management license can add the My Tasks Portlet to one of their Dashboard pages, enabling them to view Task Work Items that have been assigned to them. The My Tasks Portlet can be filtered along many useful parameters.

Example

The My Tasks Portlet can be filtered to display only Tasks beginning within the next two weeks that are ready for action whose Predecessors are more than 50% complete.

My Requests Portlet

Request Work Items can be viewed and updated from the My Requests Portlet.



My Requests

Req #	Req Type	Description	Status	Assigned To	Priority	Created By
30040	Enhancement	Upgrade to Sales Application is neces...	New		High	John Smith
30041	PMO - Issue	Not everyone on same OS	New	Jake Smith	Normal	John Smith
30042	PMO - Resource Request	Contractor needed for indexing	New		Normal	John Smith
30043	PMO - Resource Request	Contractor needed for HTML help	New		Critical	John Smith
30044	PMO - Resource Request	SAP developer	New		Normal	John Smith

Showing **1** to **5** of **18** : Maximize

Figure 6-3 My Requests Portlet

Resources with a Demand Management license can add the My Requests Portlet to one of their Dashboard pages, enabling them to view Request Work Items that have been assigned to them, or that they have created.

Personal Load and Capacity Visualizations

To see what their upcoming workload looks like, Resources with any Resource Management View or Edit Access Grant can select **Settings > View my Resource Information** from the menu bar. *Figure 6-4* shows the View Resource page for a Resource, including capacity graph and personalized Gantt chart.

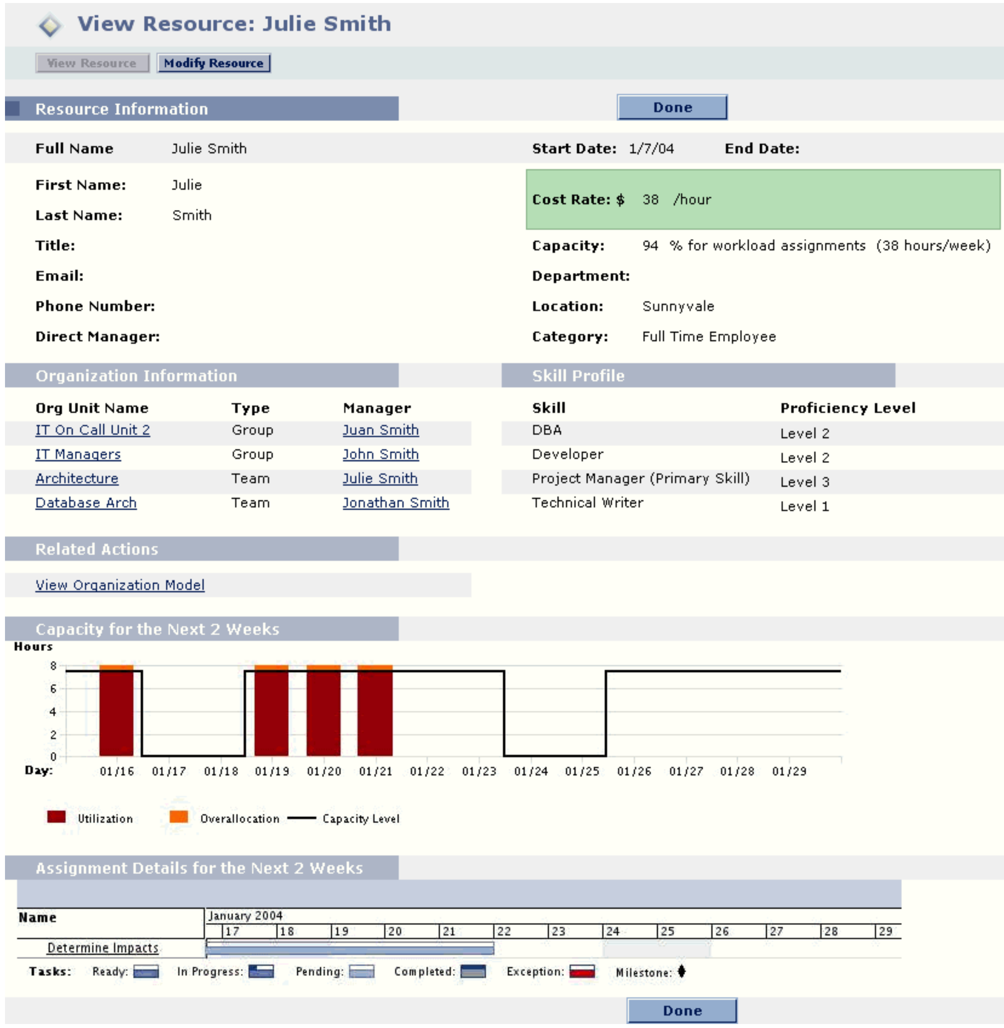


Figure 6-4 View My Resource Information page

Of particular interest are the visualizations at the bottom of the page:

- Capacity for the Next 2 Weeks — Charts the Resource's capacity against their current assignments, and shows areas of over-allocation. Non-Workload assignments are omitted.
- Assignment Details for the Next 2 Weeks — A Gantt chart that displays all of the Resource's assignments, as well as showing Task Exceptions.

Note

Depending on the Resource's level of access, some information may not be displayed, such as Cost data.

Both of these visualizations are also available as Portlets.

The Analyze Assignment Load Portlet pictured in *Figure 6-5* can be personalized to display only allocations for one Resource. For more detailed information on the Analyze Assignment Load visualization, see *"Visualizing Assignments"* on page 106.

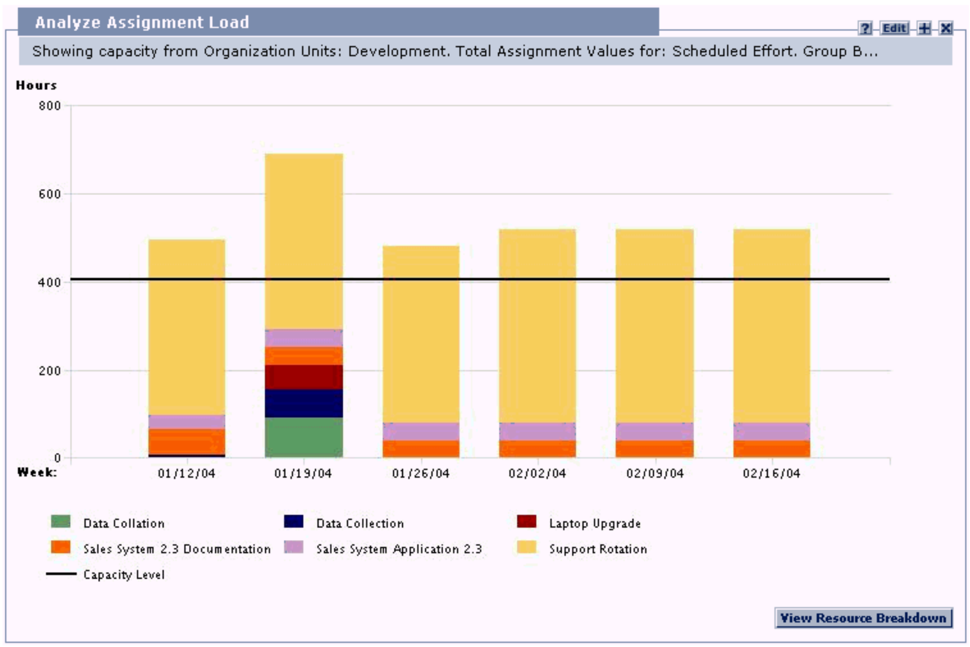


Figure 6-5 Analyze Assignment Load Portlet

The Resource Gantt Portlet pictured in *Figure 6-6* can be personalized to display only allocations for one Resource.

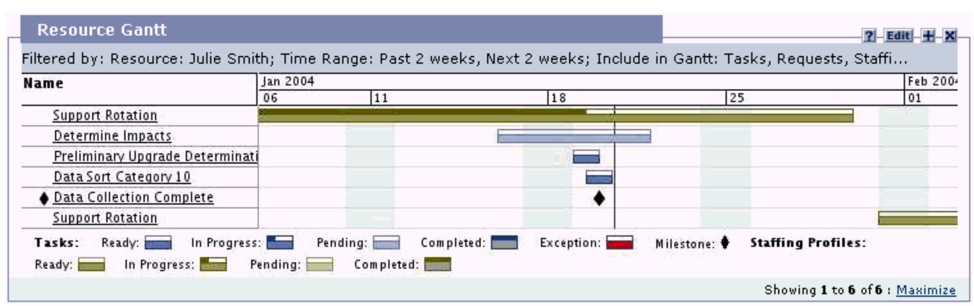


Figure 6-6 Resource Gantt Portlet

Visualizing Assignments

A basic task for Project managers and Request managers is to ensure that Work Items are assigned to their team members without overloading anyone. This task of balancing the assignments of all Resources is called load balancing.

The Analyze Assignment Load page provides a tool for visualizing assignments that allows a manager to view workload sorted according to different criteria and levels of specificity, giving them better control and visibility over their Resources' workload. *Figure 6-7* shows the Analyze Assignment Load page, which can help a manager rapidly pinpoint areas of over- or under-allocation.

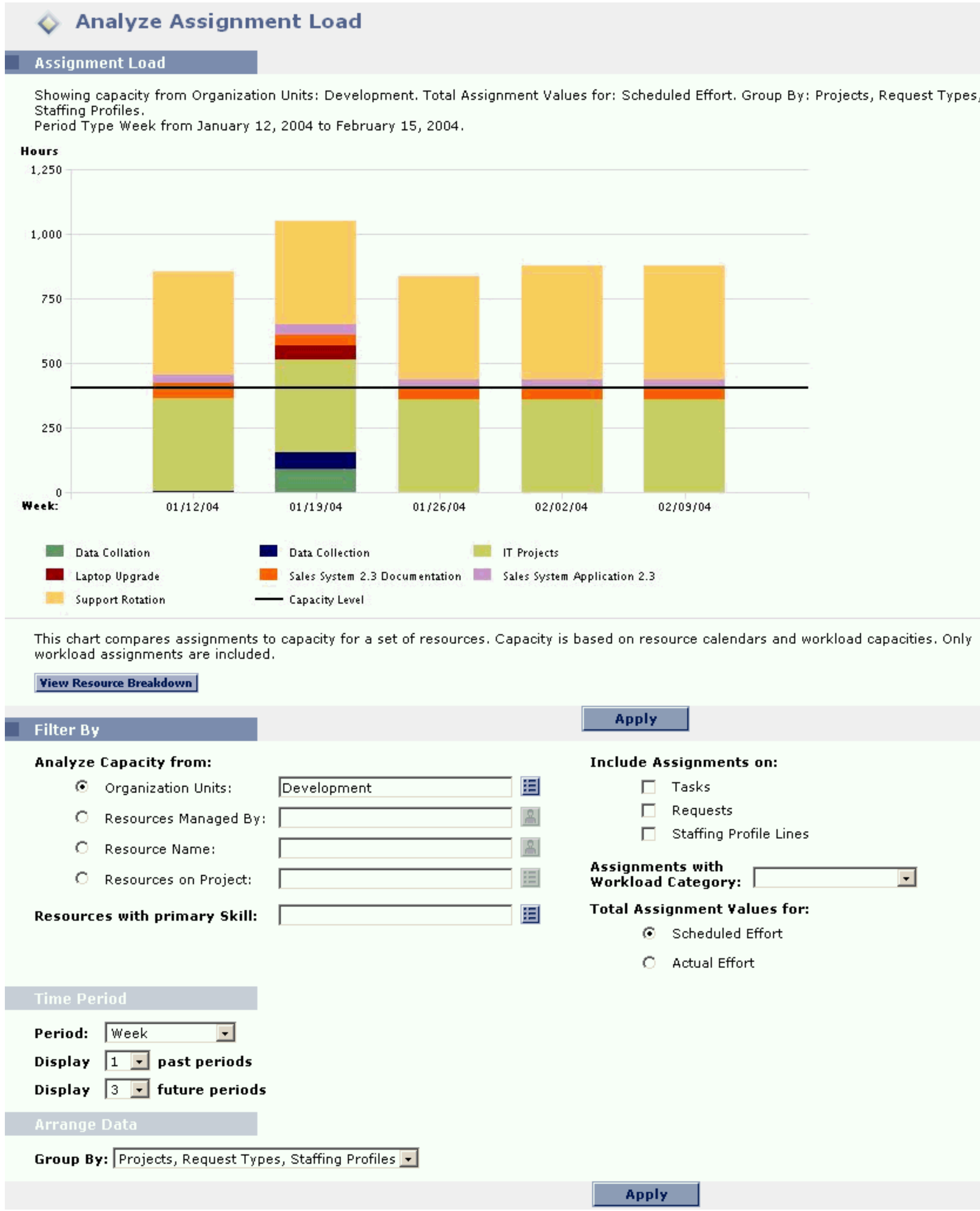


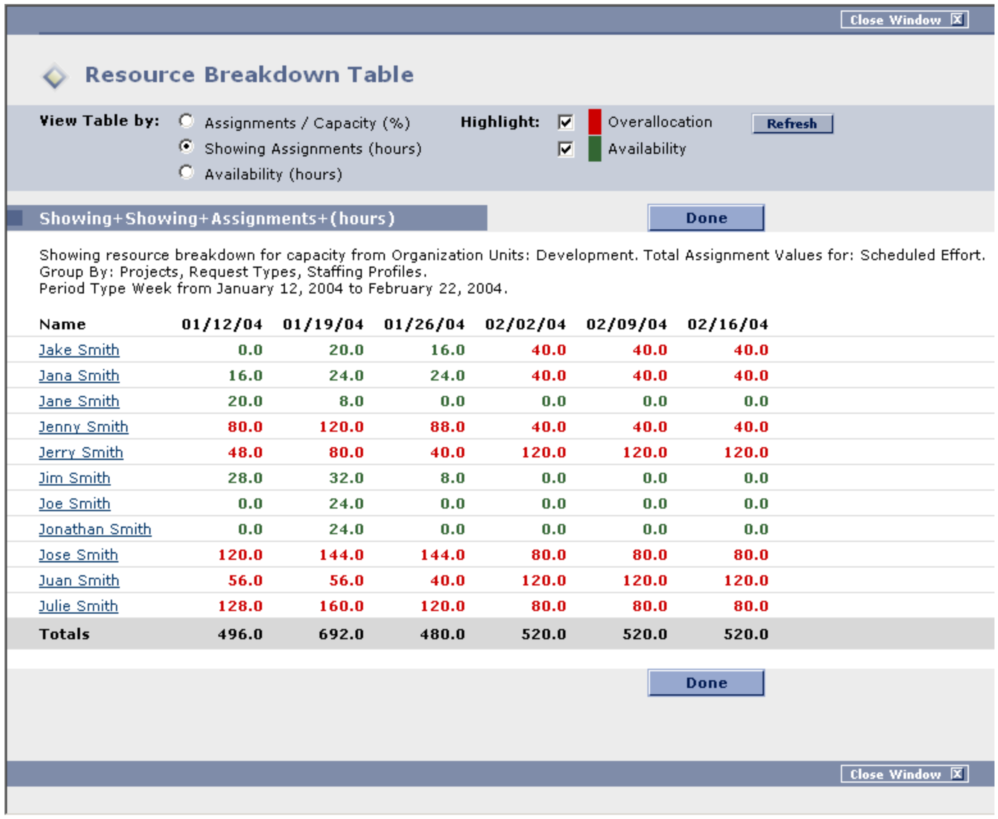
Figure 6-7 Analyze Assignment Load page

The Analyze Assignment Load page can be filtered according to the parameters described in *Table 6-2*.

Table 6-2. Analyze Assignment Load page - Parameters

Field	Description
Filter By	
Analyze Capacity From	A choice of multi-select auto-complete fields that selects the sets of Resources to display in the Analyze Assignment Load page. Possible choices: **Organization Units**, **Resources Managed By**, **Resource Name**, **Resources on Project**
Include Assignments On	Chooses whether to include **Tasks**, **Requests**, and/or **Staffing Profile Lines** in the visualization.
Assignments with Workload Category	Selects assignments of a specific Workload Category to display.
Resources with Primary Skill	A multi-select auto-complete field that selects a Skill or set of Skills to display from the sets of Resources being analyzed.
Total Assignment Values for	Sets whether to display **Scheduled** or **Actual Effort** in the Analyze Assignment Load page.
Time Period	
Period	Sets the time period being used by the Analyze Assignment Load page.
Display (x) past periods	Selects up to 20 time periods before the current date to include in the Analyze Assignment Load page. Useful for viewing historical trends.
Display (x) future periods	Selects up to 20 time periods after the current date to include in the Analyze Assignment Load page.
Arrange Data	
Group By	Chooses a category or set of categories to group the data by. Possible choices: **Projects, Request Types, Staffing Profiles**; **Skills**; **None**

To get a breakdown of total Resource capacity, click **View Resource Breakdown**. The Resource Breakdown Table, pictured in *Figure 6-8*, opens in a new window.



Close Window

Resource Breakdown Table

View Table by: Assignments / Capacity (%) Showing Assignments (hours) Availability (hours)

Highlight: Overallocation Availability Refresh

Showing+Showing+Assignments+(hours) Done

Showing resource breakdown for capacity from Organization Units: Development. Total Assignment Values for: Scheduled Effort.
Group By: Projects, Request Types, Staffing Profiles.
Period Type Week from January 12, 2004 to February 22, 2004.

Name	01/12/04	01/19/04	01/26/04	02/02/04	02/09/04	02/16/04
Jake Smith	0.0	20.0	16.0	40.0	40.0	40.0
Jana Smith	16.0	24.0	24.0	40.0	40.0	40.0
Jane Smith	20.0	8.0	0.0	0.0	0.0	0.0
Jenny Smith	80.0	120.0	88.0	40.0	40.0	40.0
Jerry Smith	48.0	80.0	40.0	120.0	120.0	120.0
Jim Smith	28.0	32.0	8.0	0.0	0.0	0.0
Joe Smith	0.0	24.0	0.0	0.0	0.0	0.0
Jonathan Smith	0.0	24.0	0.0	0.0	0.0	0.0
Jose Smith	120.0	144.0	144.0	80.0	80.0	80.0
Juan Smith	56.0	56.0	40.0	120.0	120.0	120.0
Julie Smith	128.0	160.0	120.0	80.0	80.0	80.0
Totals	496.0	692.0	480.0	520.0	520.0	520.0

Done

Close Window

Figure 6-8 Resource Breakdown Table

The Resource Breakdown Table itself can be filtered to show different data according to the parameters described in *Table 6-3*.

Table 6-3. Resource Breakdown Table - Parameters

Field	Description
View Table By	Chooses the data to display in the table. **Assignments/Capacity (%)** — Shows each Resource's assignments as a percentage of their Workload Capacity. **Showing Assignments (hours)** — Shows each Resource's assignment total in working hours. **Availability (hours)** — Shows each Resource's total available working hours.
Highlight	Chooses whether to highlight **Overallocation** (red numbers) or **Availability** (green numbers) in the table.

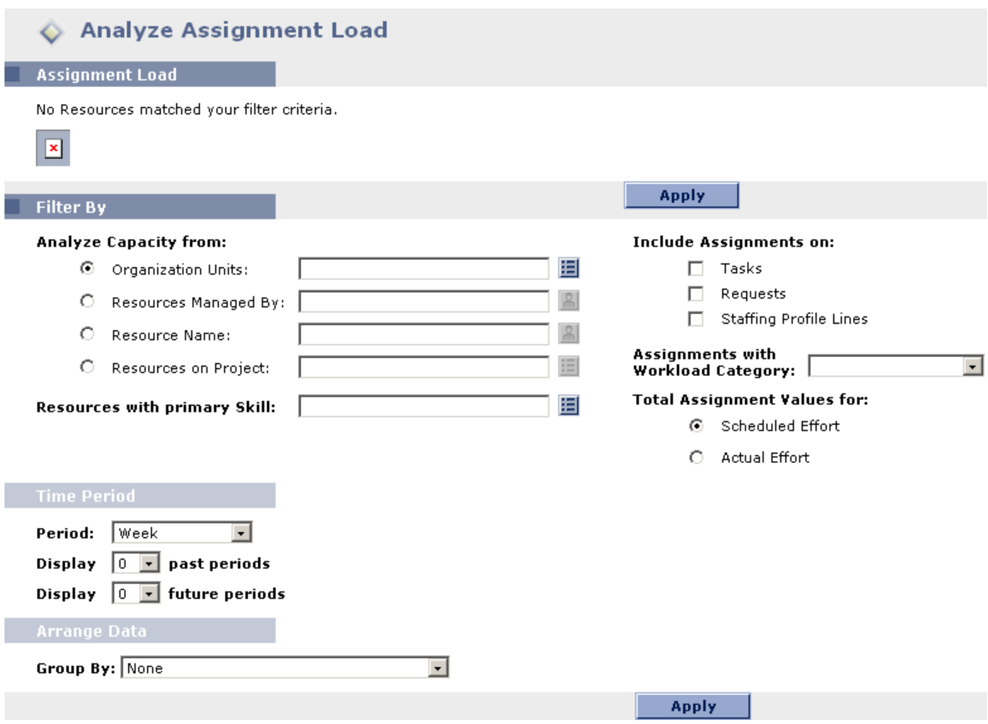
Table 6-3. Resource Breakdown Table - Parameters

Field	Description
Refresh	Refreshes the table. Click **Refresh** after making a choice in View Table By or Highlight.

To use the Analyze Assignment Load **page:**

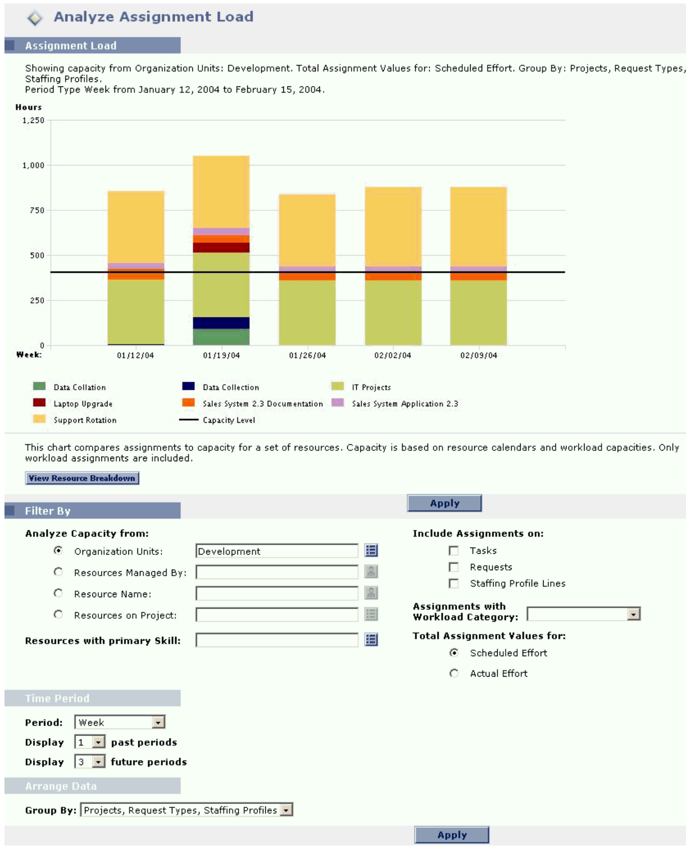
1. Log onto Mercury ITG Center.
2. Select **Resource > Analyze > Assignment Load** from the menu bar.

   The Analyze Assignment Load page opens with no graph.



3. Select any desired filter criteria.
4. Click **Apply**.

   The Analyze Assignment Load page reloads, displaying the filtered data.



5. To view a different set of data or refine your filter criteria, change any of the desired fields and click **Apply** again.

   To view the Resource Breakdown table for the displayed graph, click **View Resource Breakdown**.

With the visualizations available from the Analyze Assignment Load page, you can see areas of Resource overallocation or under-utilization, broken down by any number of filter criteria. You can use the graphs as a guide to help balance workload among Resources. Data from the Resource Breakdown table can be copied and pasted into a spreadsheet program like Microsoft Excel for further manipulation.

Note

Workload assigned to a Resource's non-working days (vacation, for example) will be redistributed to days when the Resource is present. This may result in over-allocations for that Resource, which can be adjusted in any or all of the usual ways:

- Modifying Staffing Profiles that call on the Resource
- Adjusting the Resource's Workload Capacity
- Assigning a different Resource

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