HP Project and Portfolio Management Center

Software Version: 7.5

HP Resource Management User's Guide

hp ®

invent

Legal Notices

Warranty

The only warranties for HP products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. HP shall not be liable for technical or editorial errors or omissions contained herein.

The information contained herein is subject to change without notice.

Restricted Rights Legend

Confidential computer software. Valid license from HP required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor's standard commercial license.

Copyright Notices

Trademark Notices

Adobe® is a trademark of Adobe Systems Incorporated.

Intel®, Intel® Itanium®, Intel® Xeon™, and Pentium® are trademarks or registered trademarks of Intel Corporation or its subsidiaries in the United States and other countries.

Java™ is a U.S. trademark of Sun Microsystems, Inc.

Microsoft®, Windows®, and Windows® XP are U.S. registered trademarks of Microsoft Corporation.

Microsoft Vista® is either a registered trademark or trademark of Microsoft Corporation in the United States and/or other countries.

Oracle® is a registered U.S. trademark of Oracle Corporation, Redwood City, California.

UNIX® is a registered trademark of The Open Group.

Documentation Updates

This manual's title page contains the following identifying information:

- Software version number, which indicates the software version

- Document release date, which changes each time the document is updated

- Software release date, which indicates the release date of this version of the software

To check for recent updates, or to verify that you are using the most recent edition of a document, go to: h20230.www2.hp.com/selfsolve/manuals.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

Support

You can visit the HP Software Support Web site at hp.com/go/hpsoftwaresupport.

HP Software Support Online provides an efficient way to access interactive technical support tools. As a valued support customer, you can benefit by using the support site to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Download software patches
- Manage support contracts
- Look up HP support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract.

To find more information about access levels, go to: h20230.www2.hp.com/new_access_levels.jsp.

To register for an HP Passport ID, go to: h20229.www2.hp.com/passport-registration.html.

Contents

1 Getting Started with HP Resource Management

Introduction to HP Resource Management

HP Resource Management, which is part of HP Project and Portfolio Management Center (PPM Center), provides an array of tools for managing personnel related to IT initiatives.

- Role and skill modeling capabilities unlock the potential of resources, while regional calendars make it easier to accurately determine available working hours as well as holidays and vacations. See Chapter 2, *Setting Up HP Resource Management,* on page 11 for more information on the setup work that should be completed before using HP Resource Management.

- Organizational modeling capabilities keep track of where resources are located and who they report to. See Chapter 3, *Modeling Your Organization,* on page 35 for more information on modeling your organization at the individual and group level using HP Resource Management.

- 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 execution and capacity planning for the future.

  - 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. See Chapter 4, *Using HP Resource Management for Capacity Planning,* on page 57 for more information

on using resource pools and staffing profiles to model and plan for resource allocations.

○ To support current demand and project planning, HP 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. See Chapter 5, *Using HP Resource Management for Work Plan and Request Execution,* on page 121 for more detailed information on using HP Resource Management visualizations to assess current resource usage and optimize operational capacity.

Related Documents

Related documents for this book are:

- *Getting Started*
- *HP Demand Management User's Guide*
- *HP Deployment Management User's Guide*
- *HP Project Management User's Guide*
- *HP Program Management User's Guide*
- *HP Portfolio Management User's Guide*
- *HP Time Management User's Guide*
- *Security Model Guide and Reference*
- *Creating Portlets and Modules*
- *HP Time Management Configuration Guide*

2 Setting Up HP Resource Management

Overview of Setting Up HP Resource Management

This chapter discusses a number of settings and entities that should be configured prior to using HP Resource Management. This setup work includes:

- Setting values for HP Resource Management-specific fields by altering the fields' validations

- Setting default time period views for staffing profiles and resource pools

- Creating and modifying roles that will be assigned to resources

- Creating and modifying skills that will be assigned to resources

- Setting up regional calendars that will determine holidays

- Determining request types that will count as workload, if any

- Creating resource pools

- Setting default notifications for staffing profiles and resource pools

Setting Up HP Resource Management Validations

HP Resource Management employs several fields whose values should be configured prior to using it, described in *Table 2-1*. These field values can be altered by making changes to their validations.

Table 2-1. HP Resource Management validations (page 1 of 2)

Validation	Description
KNTA - Department - Enabled	All resources have an optional **Department** field that can be used to assist resource searches. HP-supplied values are provided for this validation, but may not match your company's terminology.
RSC - Resource Category	All resources have an optional **Category** field that can be used to assist resource searches. HP-supplied values are provided for this validation, but may not match your company's terminology.
RSC - Location	All resources have an optional **Location** field that can be used to assist resource searches. HP-supplied values are not provided for this validation.
RSC - Org Unit Type	All organization units have an optional **Type** field that can be used to assist organization unit searches. HP-supplied values are provided for this validation.
RSC - Skill Category	All skills have an optional **Category** field that can be used to assist skill searches. HP-supplied values are not provided for this validation.

Table 2-1. HP Resource Management validations (page 2 of 2)

Validation	Description
RSC - Skill Proficiency	All skills can be assigned to a resource with a certain skill proficiency level. HP-supplied values are 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. HP-supplied values are provided for this validation, but may not match your company's terminology.
RSC - Resource Title	All resources have an optional Resource Title field that can be used to assist resource searches. HP-supplied values are provided for this validation, but may not match your company's terminology.

To modify the values for these field validations:

1. Log on to PPM Center.

2. From the menu bar, select **Administration > Open Workbench.**

   The PPM Workbench opens.

3. From the shortcut bar, select **Configuration > Validations.**

   The Validation Workbench window opens.
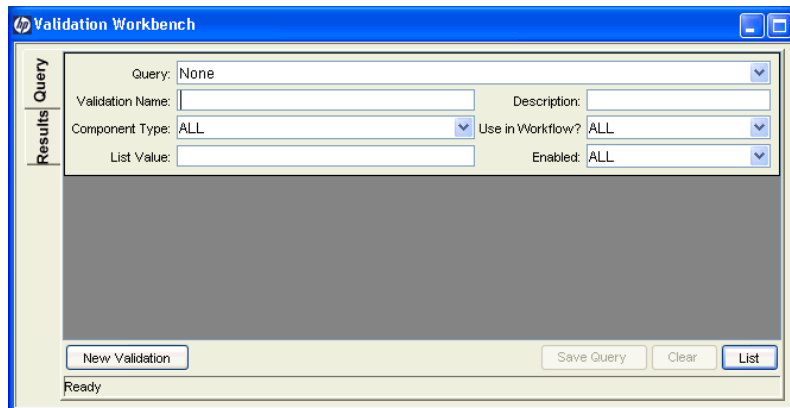
4. Type **rsc** into the **Validation Name** field and click **List.**

   The **Results** tab opens with all of the system HP Resource Management validations listed.
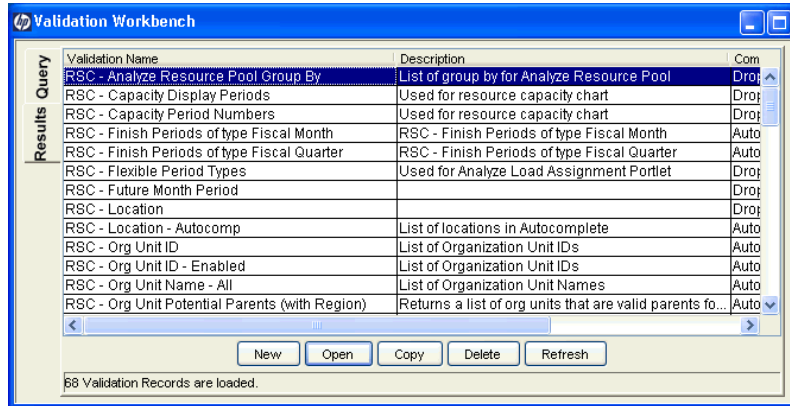
5. Modify the validations listed in *Table 2-1* on page 12 to conform to your business model.

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

   See the *Commands, Tokens, and Validations Guide and Reference* for more details on modifying values for list validations.

Setting Default Time Period Views

Staffing profiles and resource pools allow you to choose how you view the following information:

- Time periods

    o Years

    o Quarters

    o Months

    o Weeks

- Totals per resource

    o Hours

    o Full time equivalents (FTEs)

    o Person days

You can configure system-wide default settings for these options by altering the appropriate parameters in the `server.conf` file on the PPM Server. *Table 2-2* lists the parameters in the `server.conf` file that determine these default values.

Table 2-2. server.conf parameters for default time period views

Parameter	Description	Default Value
RM_DEFAULT_PERIOD_TYPE	Determines the default period type displayed in staffing profiles and resource pools. Possible values: **quarter, month, week, year**	month
RM_DEFAULT_EFFORT_TYPE	Determines the default effort type displayed in staffing profiles and resource pools. Possible values: **fte, hours, person_days**	fte
RM_ALLOWED_EFFORT_TYPES	Lists the possible effort types displayed in staffing profiles and resource pools. Possible values: **fte, hours, person_days**	fte, person_days

For more detailed information on configuring the server.conf file, see the *System Administration Guide and Reference.*

Setting Up Roles

HP Resource Management allows you to define roles and associate them with resources. Roles are associated with staffing profile positions as well as tasks on work plans, and help to clearly describe resource requirements. These roles can drive cost rates used when computing labor costs for tasks or staffing profile positions. (For information about staffing profile positions, see *Tracking Demand with Staffing Profiles* on page 71.)

► Only users with the Resource Mgmt: Edit All Roles access grant can add or modify roles.

Creating a New Role

To add a new role:

1. Log on to PPM Center.

2. Select **Resource Management > Roles & Skills > Create a Role** from the menu bar.

   The Create a New Role page opens.

3. Type a **Role Name** and complete any optional fields you want.

4. Click **Create.**

   The role is created and the Browse Roles page opens.

   Browse Roles

   Export to Excel

Select a Role		Showing 1 to 20 of 20
Name	**Description**	**Enabled**
Application Designer	Application Designer	Yes
Application Developer	Application Developer	Yes
Business Relationship Manager	Business Relationship Manager	Yes
Developer - Mainframe	Developer - Mainframe	Yes
Developer - Reporting	Developer - Reporting	Yes
Project Manager	Project Manager	Yes
Trainer	Trainer	Yes
Manager	Manager	Yes
Business Analyst	Business Analyst	Yes
Database Administrator	Database Administrator	Yes
Developer - Database	Developer - Database	Yes
Developer - Interactive Design	Developer - Interactive Design	Yes
Developer - Java/Web Technologies	Developer - Java/Web Technologies	Yes
Network Administrator	Network Administrator	Yes
Support Analyst	Support Analyst	Yes
System Administrator (UNIX)	System Administrator (UNIX)	Yes
System Administrator (WIN)	System Administrator (WIN)	Yes
QA Engineer	QA Engineer	Yes
Senior Developer		Yes
Database Admin		Yes
		Showing 1 to 20 of 20

   You can now add this role to any resource.

Modifying Existing Roles

To modify an existing role:

1. Log on to PPM Center.

2. Select **Resource Management > Roles & Skills > Browse Roles** from the menu bar.

   The Browse Roles page opens.

3. Click on a role **Name** to open its Modify Role page.

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

Deleting Roles

To delete a role:

1. Log on to PPM Center.

2. Select **Resource Management > Roles & Skills > Browse Roles** from the menu bar.

   The Browse Roles page opens.

3. Click on a role **Name** to open its Modify Role page.

4. Click **Delete.**

   The role is deleted. Roles possessed by resources or used in historical work items cannot be deleted. These roles can be disabled.

Setting Up Skills

HP Resource Management allows you to define skills and associate them with resources. To better describe resource requirements, skills are associated with staffing profile positions as well as work plan tasks. (For information about staffing profile positions, see *Tracking Demand with Staffing Profiles* on page 71.)

▶ Only users with the Resource Mgmt: Edit All Skills access grant can add or modify skills.

Creating a New Skill

To add a new skill:

1. Log on to PPM Center.

2. Select **Resource Management > Roles & Skills > Create a Skill** from the menu bar.

   The Create a New Skill page opens.

   Create a New Skill

*Name:	
Category:	
Description:	
Enabled:	⦿ Yes ○ No

   Create

3. Type a **Skill Name** and complete any optional fields you want.

4. Click **Create.** The skill is created and the Browse Skills page opens.

   You can now add this skill to any resource.

Modifying Existing Skills

To modify an existing skill:

1. Log on to PPM Center.

2. Select **Resource Management > Roles & Skills > Browse Skills** from the menu bar. The Browse Skills page opens.

3. Click on a skill **Name** to open its Modify Skill page.

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

Deleting Skills

To delete a skill:

1. Log on to PPM Center.

2. Select **Resource Management > Roles & Skills > Browse Skills** from the menu bar.

   The Browse Skills page opens.

3. Click on a skill **Name** to open its Modify Skill page.

4. Click **Delete Skill.**

   The skill is deleted. Skills possessed by resources or used in historical work items cannot be deleted. These skills can be disabled.

Setting Up a Regional Calendar

A regional calendar sets the default working and non-working days for an organization unit, resource, or project. Individual resources' work schedules can be set using individual resource calendars.

To set up a regional calendar:

1. Log on to PPM Center.

2. Select **Administration > Regions > Browse Regional Calendars** from the menu bar.

   The Manage Regional Calendars page opens.

You can expand or narrow down the list of regional calendars by entering search criteria into the filter fields and clicking **Search.**

3. Click the name of the regional calendar you wish to modify.

   The Modify Regional Calendar <*Name*> page opens.

4. Select a day or range of days by using `Shift + click` or `Ctrl + click.`

5. Click the **Non-Working day** option to mark those days as non-working.

   Optionally, select a **Reason** and type a **Description.**

6. Click **Save.**

   The regional calendar is set. Non-working days will appear as non-working days for resources and organization units using the regional calendar.

Specifying the System Default Regional Calendar

The System Default Regional Calendar is used for the scheduling of request work items. All other entities must select a region or inherit one, and thus use the regional calendar set for that region.

There can be only one System Default Regional Calendar, which is set during installation or upgrade of the PPM Center. This setting can be changed if needed.

To set the System Default Regional Calendar:

1. Log on to PPM Center.

2. Select **Administration > Regions > Set System Default Regional Calendar** from the menu bar.

   The Set System Default Regional Calendar page opens, displaying all enabled regional calendars. The current System Default Regional Calendar is selected.

3. Select the desired regional calendar and click **Done.**

Setting Up Regions

Besides setting regional calendars for resources, regions also govern currency display settings. For details on creating and modifying regions, see the *HP Financial Management User's Guide.*

Setting Up Request Work Item Fields

If you have licenses for HP Demand Management, and you wish to include requests as work items to be tracked using HP Resource Management, include work item fields into your request types. Work item fields include the following (for a list of all request work item fields, see *Table 5-1* on page 122):

- 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 2-1* illustrates the relationship between the work item field group, a request header type, and a request type.

Figure 2-1. Work item field group in a request type

To avoid associating work item fields with a request you don't want to track, use a one-to-one mapping between the request header type and the request type.

When Field Groups are associated with existing request types (through the request header type definition), tables in the PPM 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 and Reference.* Contact your system administrator for help with this procedure.

To associate work item fields with a request type:

1. Log on to PPM Center.

2. From the menu bar, select **Administration > Open Workbench.**

   The PPM Workbench opens.

3. From the shortcut bar, select **Demand Mgmt > Request Header Types.**

   The Request Header Type Workbench opens.
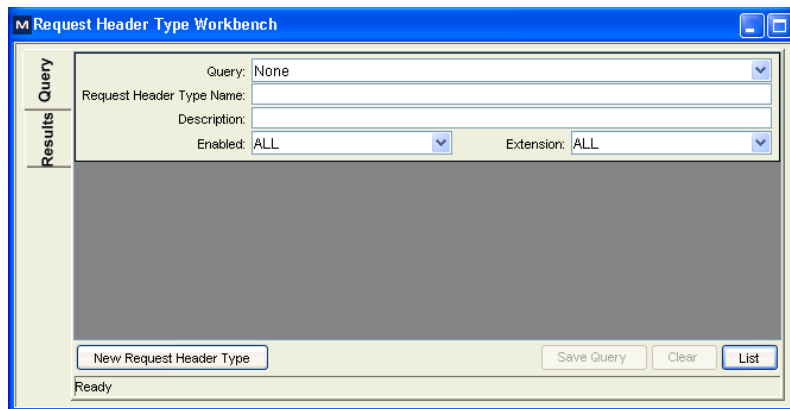
4. Click **New Request Header Type.**

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

5. Click **Field Groups.**

   The Field Groups window opens.

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

6. Select the **Enabled** checkbox 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 the *HP Demand Management Configuration Guide* 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 the *HP Demand Management Configuration Guide* 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 HP Resource Management.

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

► HP 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.

Setting Up Resource Pools

Resource pools enable resource planners to designate future resource capacity, arranged by role or organization unit. For a more detailed discussion of resource pools and their role in HP Resource Management, see *Chapter 4, Using HP Resource Management for Capacity Planning,* on page 57.

HP recommends that you set up resource pools before creating any staffing profiles. For detailed instructions on setting up resource pools, see *Planning Capacity with Resource Pools* on page 59.

Setting Up Default Notifications for Staffing Profiles and Resource Pools

Notifications allow resource pool managers, staffing profile managers, and resources to be notified (by email) when certain events occur, such as when resource requests are sent, forwarded, or rejected, and resources are allocated. Default notifications are the notifications that are automatically set up when a staffing profile or resource pool is created.

You must set parameters in `server.conf` to successfully send email notifications. See *Setting Notification Parameters* on page 33 for more details.

▶ If the resource pool manager and the staffing profile manager are the same person, notifications are not sent. If a resource pool manager is one of a group of staffing profile managers, only the other staffing profile managers receive notifications.

Default Staffing Profile Notifications

Default staffing profile notifications are set to notify a staffing profile manager when a resource request is rejected, a resource is committed, a committed resource changes to soft booked or is removed, and when the start date, end date or FTEs of a committed resource is adjusted. Optionally, you can also set the default staffing profile notifications to notify a staffing profile manager when a resource request message is forwarded or when soft booked resource allocations are affected.

You can modify the default notifications or you can modify the notifications of a specific staffing profile (see *Modifying Staffing Profile Notifications on page 82* for more information). Modifying default notifications does not affect the notifications of existing staffing profiles.

Default Resource Pool Notifications

Default resource pool notifications are set to notify the resource pool manager when resource requests are sent or forwarded to this resource pool. Optionally, you can also set default resource pool notifications to notify the resources when their committed or softbooked allocations are affected.

You can modify the default notifications or you can modify the notifications of a specific resource pool (see *Modifying Resource Pool Notifications on page 64* for more information). Modifying default notifications does not affect the notifications of existing resource pools.

You can temporarily disable notification to a resource when you make an assignment. See *Disabling Notification to a Resource on page 65* for more information.

Modifying Default Notifications

You must have Edit All Staffing Profiles or Edit All Resource Pools access grants in order to modify default notifications.

To modify default notifications for staffing profiles and resource pools:

1. Log on to PPM Center.

2. From the menu bar, select **Administration > Resource Management > Configure Notification Defaults.**

3. Select or unselect the checkbox for the level of notification you desire.

4. Click **Save.**

Grouping Notifications

Notifications can be sent out immediately or, if they are to be sent to the same recipient, notifications can be grouped in a single email. You can configure this delivery option by setting the RM_NOTIFICATION_INTERVAL_MINUTES parameter in the server.conf file (for more information on configuring the server.conf file, see the *System Administration Guide and Reference*). The RM_NOTIFICATION_INTERVAL_MINUTES parameter defines how often, in minutes, notification emails are sent.

To send out notifications immediately, set the RM_NOTIFICATION_INTERVAL_ MINUTES parameter to 1.

To group notifications for a single recipient in one email, set the RM_ NOTIFICATION_INTERVAL_MINUTES parameter to greater than 1. During the defined time interval, notifications to a single recipient are grouped. When the time interval ends, one email with the grouped notifications is sent to the recipient.

Setting Notification Parameters

The following parameters in the server.conf file must be configured in order to send notifications:

Table 2-3. server.conf parameters for notifications

Parameter	Description	Default Value
EMAIL_NOTIFICATION_ SENDER	Email address of the default sender of email notifications.	
ENABLE_RM_NOTIFICATION_ SERVICE	Enable the notification service. The service must be enabled in order to send notifications. Possible values: **TRUE, FALSE**	TRUE
RM_NOTIFICATION_ INTERVAL_MINUTES	How often, in minutes, notifications are sent. If set to 1, notifications are sent immediately. If set to a number greater than 1, notifications sent to the same recipient during that interval are grouped into a single email.	10
SMTP_SERVER	Host name of the SMTP-compliant mail server that acts as the gateway for email notifications.	
TURN_ON_SCHEDULER	Turns on the scheduler. The scheduler must be enabled in order to send notifications. Possible values: **TRUE, FALSE**	TRUE

For more detailed information on configuring the server.conf file, see the *System Administration Guide and Reference*.

3 Modeling Your Organization

Overview of Modeling Your Organization

This chapter discusses the various attributes of resources and organization units, and discusses how to set them up, among them:

- Configuring information for individual resources

  - Resource attributes like name, phone number, email address

  - Calendar information for each resource, including planned vacation days

  - Resource security settings that determine what the resource can view and edit

- Setting up organization units

  - Placing resources inside organization units

  - Setting organization units' relationships to each other

  - Determining whether an organization unit's membership is linked to a particular security group

  - Determining whether an organization unit is primary or matrixed

Setting Up a Resource

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

- First and last name

- Phone number

- Email address

- Direct manager

- Department

- Role

- Skills

- Region

- Time sheet approver

Figure 3-1. View Resource page

Table 3-1 describes resource attributes that are especially useful. To take full advantage of HP Resource Management functionality, these attributes should be defined for every resource.

Table 3-1. Key resource attributes

Attribute	Utilization
Role	Used in resource booking and to build staffing profiles and resource pools (see *Using HP Resource Management for Capacity Planning* on page 57). See *Setting Up Roles* on page 16 for more detailed information.
Skills	Used to further describe resource requirements for tasks and staffing profile positions beyond the role description. See *Setting Up Skills* on page 20 for more detailed information.
Region	Used to determine the resource's regional calendar and currency settings. A resource can inherit their region setting from their primary organization unit, or a region can be specified directly. For more information on regions and regional calendars, see *Setting Up a Regional Calendar* on page 23. For more information on currency settings, see the *HP Financial Management User's Guide.*

Resources map to PPM Center users on a one-to-one basis.

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

The system takes into account users' start and end dates in resource capacity calculations and visualizations. For example, a user who is set to leave the company at a certain date cannot be assigned to a task or staffing profile afterward. Likewise, users starting work in the future can be selected for relevant entities scheduled to be active in the future.

The system also takes into account a resource's participation in a resource pool for resource capacity calculations and visualizations. If the resource belongs to one or more resource pools, the capacity is non-zero.

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

Setting Resource Attributes

General resource attributes are set in the standard interface.

➤ Resource cost rates are set using cost rate rules. See the *HP Financial Management User's Guide* for more detailed information on cost rate rules and their configuration.

To configure attributes for a resource:

1. Log on to PPM Center.

2. Select **Resource Management > Resources > Search Resources** 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 changes to display the results of your search.

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

   The Modify Resource page opens to the **General** tab.

5. Provide date for any desired resource attributes.

   The primary organization unit the resource belongs to appears in the **Organization Information** section.

   To add a role and skills, click the **Role/Skill** tab.

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

► The resource will use the regional calendar and currency configured for its selected region.

Setting Up the Resource Calendar

A resource's calendar, which specifies working and non-working days for that particular resource, is configured in the standard interface. Resources that are part of a security group with the **Edit My Calendar** access grant can edit their own calendars.

To set a resource's calendar:

1. Open the resource's Modify Resource page as described in *Setting Resource Attributes* on page 38.

2. Open the resource's calendar by clicking the **Calendar** tab of the Modify Resource page.

3. Select a day or range of days by using `Shift + click` or `Ctrl+ click.`

4. Choose the **Non-Working day** option to mark those days as non-working.

   Optionally, select a **Reason** and type a **Description.**

5. Click **Save.**

   The resource's calendar is set and will be used to calculate that resource's capacity in HP Resource Management visualizations.

   ➤ By default, the resource calendar will inherit all the non-working days set in the regional calendar the resource uses.

Modifying Multiple Resources

You can modify attributes for multiple resources simultaneously. For example, you may want to associate a particular role or region with multiple resources without having to update each resource individually.

To modify attributes for multiple resources simultaneously:

1. Log on to PPM Center.

2. Select **Resource Management > Resources > Search Resources** 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 changes to display the results of your search.

4. Select the checkboxes next to the **Username** of each resource you want to modify and click **Modify Selected Resources.**

   The Resource Mass Update page opens.

5. Provide data for any desired resource attributes.

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

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 3-2* describes these access grants in more detail.

Table 3-2. Resource information access grants

Access Grant	Description
View my own personal resource info only	The user can only view his 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.
Edit My Calendar	The user can edit his own resource calendar.

Access grants are linked to a user through their security group membership. For more information on user security, see the *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 3-2* illustrates a sample organization model.

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 3-2. Sample organization model

There are two kinds of organization units:

- **Primary.** Resources can only belong to one primary organization unit. If set to inherit their region setting from their parent organization unit, a resource will inherit their primary organization unit's region. Only primary organization units can be linked to resource pools (see *Planning Capacity with Resource Pools* on page 59 for more information).

- **Matrix.** Made up of members from primary organization units, matrix organization units do not determine region settings for their resources.

An organization unit of one type can be converted into the other. See *Converting Organization Unit Type* on page 55 for more information.

▶ Every resource needs to be a member of one and only one primary organization unit. Resources that are not assigned to a primary organization unit become part of a default "Unspecified" organization unit and inherit the region assigned to it.

Organization units can have budgets, staffing profiles, and resource pools associated with them, making it easy to run comparisons.

Figure 3-3 depicts the Budget to Budget Comparison portlet comparing the budget for an entire IT organization unit with the project budgets owned by its members. Observe that during the first and last months, the combined budgets for these projects exceed the budget for the organization unit by a wide margin.

Figure 3-3. Organization unit budget compared to project budgets
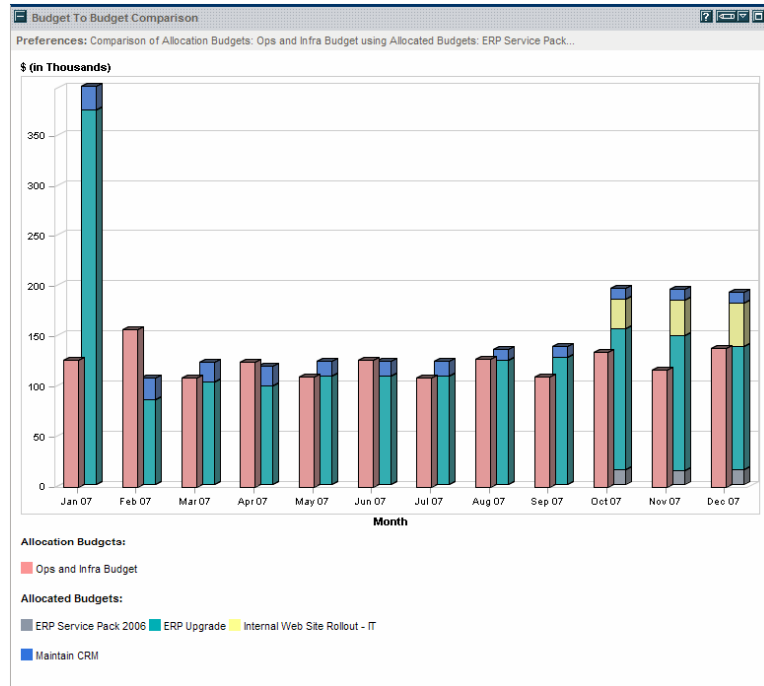
You can also show the assignment load for all resources in an organization unit with the Analyze Assignment Load portlet. *Figure 3-4* shows the Analyze Assignment Load portlet for an organization unit whose members are currently underutilized. The total capacity for the organization unit is calculated from each resource's calendar and workload capacity.

Figure 3-4. Analyze Assignment Load portlet
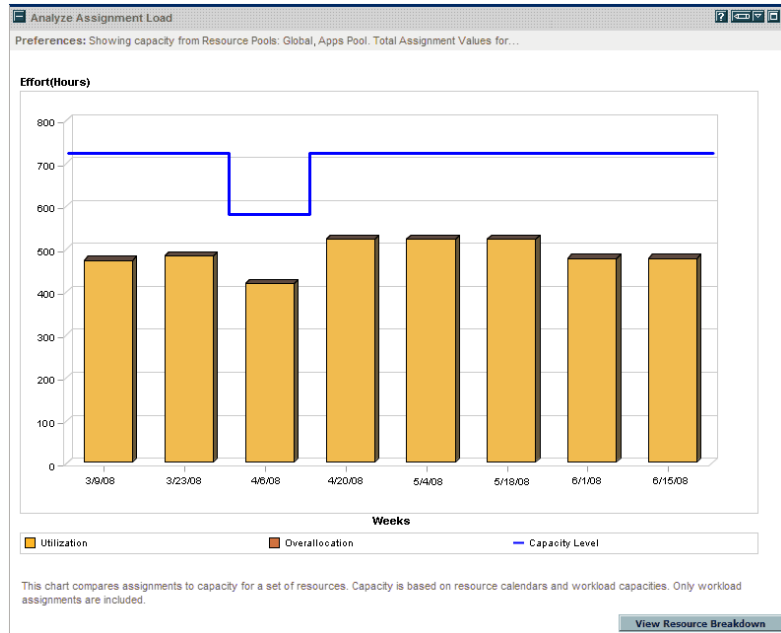
Creating an Organization Unit

To create an organization unit:

1. Log on to PPM Center.

2. Select **Resource Management > Organization Model > Create an Org Unit** from the menu bar.

   The Create a New Organization Unit page opens.

3. Provide the organization unit **Name** and any other desired information.

   a. If necessary, select a **Parent Org Unit.**

   b. Determine whether to **Inherit Region from Parent** or select from the **Use this Region** field for the organization unit.

   c. From the **This Organization Unit is a** field, select **Primary** or **Matrix.**

4. Add users to the organization unit by selecting a user from the **Resource** field 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 3-5* illustrates the terms used by HP Resource Management when defining the organization model.

Figure 3-5. Parent organization unit with two child units

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

Figure 3-6. Top of Modify Organization Unit page

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.

Figure 3-7. Create a New Child Org Unit button

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

1. Log on to PPM Center.

2. Selecting **Resource Management > Organization Model > Search Org Units** from the menu bar.

   The Modify Organization Units page opens.

3. Enter search criteria and click **Search.**

   The Modify Organization Units page changes to display the results of your search.

4. Click the name of the organization unit you wish to modify.

   The View Organization Unit page opens.

5. 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 PPM Center administrators to business users who actually manage organization units.

Figure 3-8. Security group membership determined by organization unit
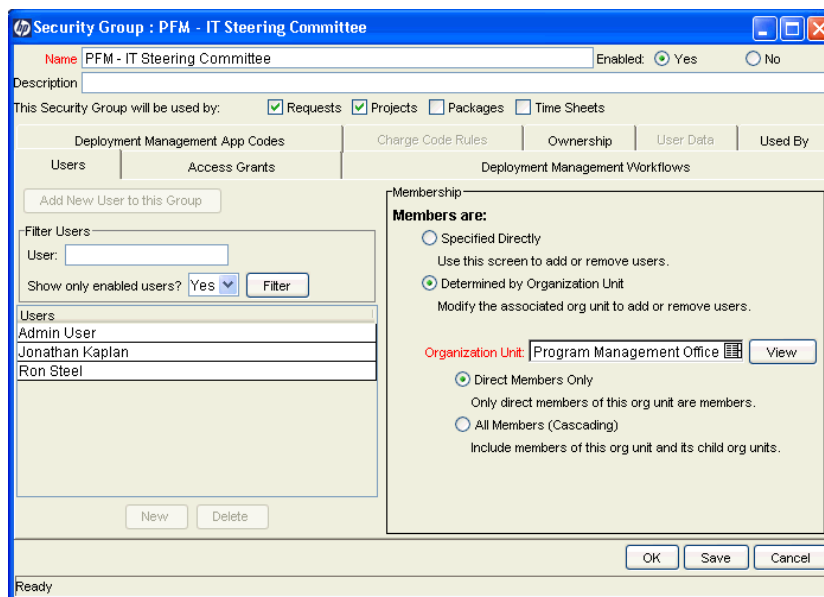
With HP Resource Management, security group membership can be determined in the following ways:

- **Specified Directly.** Security group members are specified in the **Users** tab of the Security Group window in the PPM Workbench. 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.

> When a security group's members are determined by an organization unit, the organization unit's member list overwrites 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. Log on to PPM Center.

2. From the menu bar, select **Administration > Open Workbench.**

   The PPM Workbench opens.

3. From the shortcut bar, select **Sys Admin > Security Groups.**

   The Security Group Workbench opens.
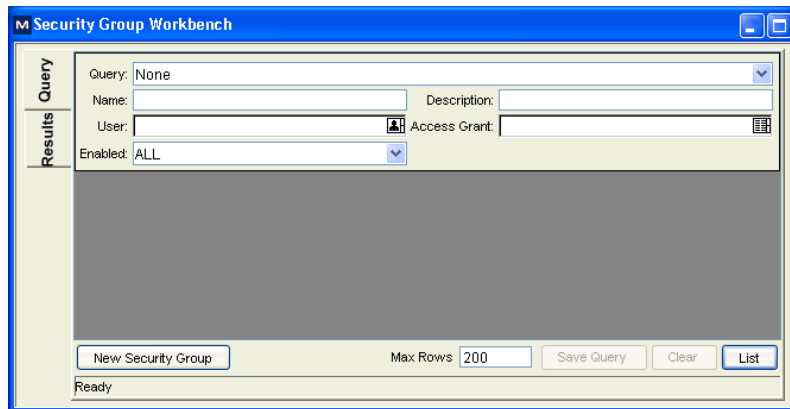
4. Create a new security group or search for and open an existing one.

   The Security Group window opens.

5. In the **Users** tab, select the **Determined by Organization Unit** option.

   A question dialog box opens, warning you that the security group's present member list will be overridden by the current members of the organization unit.

6. Click **Yes** to continue.
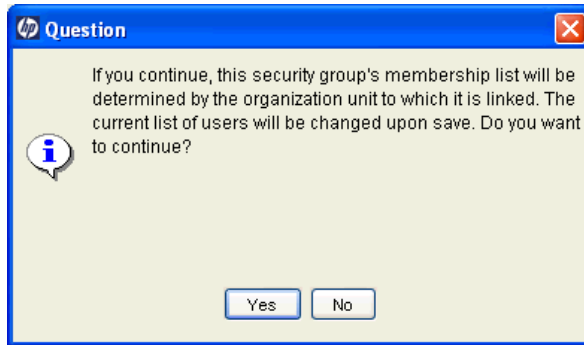
The **Organization Unit** auto-complete field becomes enabled and required.

7. Select an organization unit to be linked to the security group.

8. Specify either **Direct Members Only** or **All Members (Cascading)** for the security group's member list.

9. Click **Save.**

   You will see the new list of members for the security group.

Converting Organization Unit Type

Primary organization units can be converted into matrix organization units and vice versa. The following changes apply when the conversions are made:

- **Primary to Matrix.** All of the Resources in the organization unit will now belong to the "Unspecified" organization unit.

  - If they were set to inherit their region from their organization unit, they will now inherit the region belonging to the "Unspecified" organization unit.

  - If there was a resource pool associated with the organization unit, it will no longer be linked.

- **Matrix to Primary.** All of the resource in the organization unit will be pulled out of their existing primary organization units and placed in the current one. If they were set to inherit their region from their former primary organization unit, they will instead inherit their region from the current organization unit.

When you attempt to make this conversion, HP Resource Management will present you with a window detailing the impact of the change. You can then confirm the conversion or cancel the attempt.

To convert an organization unit from Primary to Matrix or vice versa:

1. Log on to PPM Center.

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

3. Click the name of the organization unit you wish to convert.

   The View Organization Unit page opens.

4. Click **Modify Org Unit.**

   The Modify Organization Unit page opens.

5. Next to **Change to a Matrix/Primary Organization Unit,** click **Change.**

A window opens, displaying a list of the users whose organization unit or region settings will be altered.
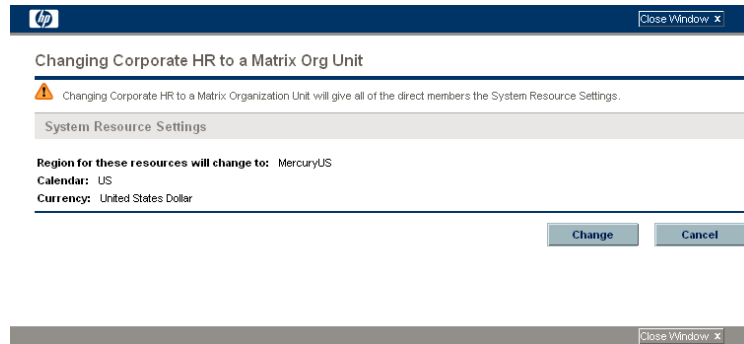
6. Click **Change.**

4 Using HP Resource Management for Capacity Planning

Overview of Using HP Resource Management for Capacity Planning

Resource capacity planning consists of the following activities:

- Gauging present resource capacity and workload

- Predicting future resource capacity in terms of needed roles or resources

- Forecasting future resource demand in terms of needed roles or resources

- Viewing historical trends in resource allocation

- Comparing present resource usage to previous forecasts

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

- **Staffing profiles.** Staffing profiles allow a manager to plan the future allocation of resources, broken down by role. This lets the business see what kinds of resources and roles they will need for future work.

- **Resource pools.** Resource pools provide a way to track future resource capacity, broken down by role. This lets the resource manager see what resources and roles will be available to apply to future work.

Staffing profiles and resource pools integrate to form an end-to-end resource management process:

1. Resource managers create resource pools that define resource capacity. See *Planning Capacity with Resource Pools* for details on creating resource pools.

2. Project managers create staffing profiles that forecast resource demand. See *Tracking Demand with Staffing Profiles* on page 71 for details on staffing profile usage and creation.

3. These staffing profiles spawn resource requests meant for various resource pools. See *Sending Resource Requests from a Staffing Profile* on page 83 for details on resource requests.

4. Resource managers fill these requests by drawing from the specified resource pools to make the actual resource allocations to the originating staffing profiles. See *Assigning Resource Pool Resources* on page 89, *Adjusting Resource Participation Within Resource Pools* on page 66, and *Assigning Resource Requests from the Resource Allocation Management Page* on page 114 for details on making assignments to staffing profiles from resource pools.

   Resource managers can also forward requests to another resource pool, or reject resource requests altogether. See *Rejecting and Forwarding Demand* on page 92, *Forwarding Resource Requests from the Resource Allocation Management Page* on page 114, and *Rejecting Resource Requests from the Resource Allocation Management Page* on page 115 for details on forwarding and rejecting resource requests.

   Resource managers can load balance resources from their pools across the staffing profiles requesting resources. They can also examine the utilization of resources on projects. See *Analyzing Staffing Profiles Associated with Projects* on page 97 and *Analyzing Resource Pools* on page 93 for details on this process.

Planning Capacity with Resource Pools

Resource pools enable resource planners to designate future resource capacity, arranged by role or resource, split according to any of the options described in *Table 4-1*:

Table 4-1. Resource pool features

Feature	Options
Lines on a resource pool can represent	• Resources • Roles • (both)
A resource pool can show capacity forecasts out to	• 3 months • 6 months • 9 months • 1 year • 2 years • 3 years
Resource capacity can be grouped by	• Week • Month • Quarter • Year
Resource capacity totals can be shown in	• Hours • Full Time Equivalents (FTE) • Person Days

Resource pools can be organized into hierarchies, mirroring or elaborating on groupings of responsibility in a business. *Table 4-2* describes the key attributes of a resource pool.

Table 4-2. Resource pool attributes

Field Name	Description
Resource Pool Information	
Name	The name of the resource pool.
Description	A description of the resource pool.
Pool manager	The user responsible for the resource pool and allocating resources to staffing profiles.
This Resource Pool is for	Defines whether the resource pool is associated with a primary organization unit or freestanding.
Region	The region associated with the resource pool; determines holiday schedule for unnamed resources.
Parent resource Pool	Allows you to specify a parent resource pool if desired, creating a hierarchy of resource pools.

Using Resource Pools: General Walkthrough

The resource pool is a tool for the resource manager. Resource managers can use resource pools and their visualizations to assess whether proposed projects or programs are within capacity bounds.

Aside from making assignments within staffing profiles from resource pools, a resource manager can examine resource pools themselves to determine overallocations. The resource manager can then perform load balancing by doing any of the following:

- Reassigning staffing assignments to other resources

- Adding resources to the resource pool

- Transferring resources to another resource pool

- Modifying a resource's level of participation across multiple resource pools

A resource manager can also assess and manage resources and resource requests for a resource pool from the Resource Allocation Management page. See *Managing Resource Allocation* on page 103 for more information.

Creating a Resource Pool

To create a resource pool:

1. Log on to PPM Center.

2. Select **Resource Management > Resources > Create a Resource Pool** from the menu bar.

   The Create a New Resource Pool page opens.

3. Complete the required fields and any optional fields.

   At this point, you should decide the following:

   - Whether the resource pool is freestanding or associated with a primary organization unit, and if so, which one

   - Whether the resource pool has a parent resource pool

4. Click **Create.**

   The Resource Pool page opens.

5. Add lines to the resource pool.

   a. Click **Manage Pool Capacity.**

      The Manage Pool Capacity page opens.

Manage Pool Capacity: Shared Developers — Done

Resource	Role	Q2 '06		Q3 '06		
		Jun	Jul	Aug	Sep	Oct
○ Brandi Greer	Database Administrator	1	0.85			
○ Finn Gill	Database Administrator		1	0.35		
○ Holly Haywood	Developer - Java/Web Technologies	1	0.45			
○ Jason Swain	Database Administrator	1	0.85			
○ John Groom	Developer - Interactive Design	1	0.85			
○ Larry X. Veach	Developer - Java/Web Technologies	1	1	1	1	1
○ Leslie Franklin	Developer - Interactive Design	1	0.85			
○ Pamela Stewart	Developer - Database	1	0.85			
○ Raymond Ackley	Developer - Java/Web Technologies	1	1	1	1	1
○ Richard Gomez	Database Administrator	1	1	1	1	1
○ Traci Shimizu	Network Administrator	1	0.85			
○ William Klein	Developer - Interactive Design	1	0.85			
Month Total		**11**	**10.4**	**3.35**	**3**	**3**

Export Resource Pool

***FTEs for these lines are rolled up from child Resource Pools.

   b. Click the links below the resource pool name.

      ● **Show Pool for the Next** specifies the amount of time the resource pool will cover.

      ● **Show Resource Capacity In** determines the time period breakdown.

      ● **Show Totals In** sets the units in which to count allocations.

   c. Add a resource or role.

      ● To add a resource, click **Add New Resource** to specify a resource and the resource's start date for the resource pool.

      ● To add a role, click **Add Unnamed Headcount** to specify a role and the required hours for the role.

      The Manage Pool Capacity page reloads with the resource pool line added, specifying a resource or role.

> To maintain PPM Center performance, when the number of resources assigned to a resource pool exceeds `RM_MAX_IN_POOL,` certain functionality is disabled. However, you can remove the excess resources to re-enable this functionality.

d. Repeat as necessary.

e. Click **Done.**

The Resource Pool page opens.

Viewing Resource Pools

Resource pools are accessed most easily from the Resource Pool List portlet.

Figure 4-1. Resource Pool List portlet

Users with View or Edit All Resource Pools access grants can add the Resource Pool List portlet to their PPM Dashboard. Refer to the "Adding Portlets to PPM Dashboard Pages" section in the Getting Started guide for more information.

You can also view resource pools by using the Search Resource Pools page:

1. From the menu bar, select **Resource Management > Resources > Search Resource Pools.** The Search Resource Pools page opens.

Figure 4-2. Search Resource Pools page

2. Provide search criteria in the appropriate fields.

3. Click **Search.**

   The Search Resource Pools page reloads, displaying the results of your search.

4. Click the name of a resource pool to open its resource pool page.

Modifying Resource Pool Notifications

Notifications allow resource pool managers and resources to be notified (by email) when resource requests are sent or forwarded and resources are allocated. By default, resource pool notifications are set to notify the resource pool manager when resource requests are sent or forwarded to this resource pool.

To modify resource pool notifications:

1. Open a resource pool.

2. In the Resource Pool page, click **Configure Notifications.**

3. Select or unselect the check box for the level of notification you desire.

4. Click **Save.**

Disabling Notification to a Resource

If a resource pool is configured to send notifications to a resource, you can temporarily disable notification to the resource when you make an assignment:

1. Open a resource pool.

2. In the Resource Requests section of the Resource Pool page, click on the name of a staffing profile.

   The Staffing Profile page opens.

3. Click **Assign.**

   The Resource Capacity with Assignments dialog opens.

4. To temporarily disable notification to the resource, select the **Do not send this resource an email notification** check box.

5. Click **Save.**

▶ Notification to this resource is disabled for this assignment only.

Exporting Resource Load and Forecasted Demand to Excel

To export the resource load or forecasted demand data tables:

1. Open a resource pool.

2. Click either **View Forecasted Demand** or **View Resource Load.**

3. Click the **Microsoft Excel** icon.

   A new window opens, refreshing at a set interval until the system completes the export.

4. Save the exported Excel file.

▶ If you are having problems with the data in Excel, you may need to configure the Internet options of your Web browser. See the *HP Project Management User's Guide* for more information.

Adjusting Resource Participation Within Resource Pools

A resource may participate in more than one resource pool at a time. You can adjust the distribution of a resource's time across resource pools, which has the effect of altering the resource's capacity in each pool.

To redistribute a resource's participation across multiple resource pools:

1. Open a resource pool.

2. In the Resource Pool page, click **Manage Pool Capacity.**

   The Manage Pool Capacity page for the resource pool opens.

Resource	Role	Q2 '06		Q3 '06		
		Jun	Jul	Aug	Sep	Oct
Brandi Greer	Database Administrator	1	0.85			
Finn Gill	Database Administrator		1	0.35		
Holly Haywood	Developer - Java/Web Technologies	1	0.45			
Jason Swain	Database Administrator	1	0.85			
John Groom	Developer - Interactive Design	1	0.85			
Larry X. Veach	Developer - Java/Web Technologies	1	1	1	1	1
Leslie Franklin	Developer - Interactive Design	1	0.85			
Pamela Stewart	Developer - Database	1	0.85			
Raymond Ackley	Developer - Java/Web Technologies	1	1	1	1	1
Richard Gomez	Database Administrator	1	1	1	1	1
Traci Shimizu	Network Administrator	1	0.85			
William Klein	Developer - Interactive Design	1	0.85			
Month Total		**11**	**10.4**	**3.35**	**3**	**3**

3. Select the radio button next to a resource and click **Manage Participation.**

   The Manage Resource Pool Participation page for that user opens, displaying the user's current distribution of participation across resource pools.

Manage Resource Pool Participation: Brandi Greer

Resource Pool	Effective Date Aug 11, 2006	Effective Date Jul 27, 2006	Effective Date Jan 1, 2006
Shared Developers			100
Apps Pool		100	
Shared DBAs	100		
Non-Workload	0	0	0
Total (Must be 100%)	100%	100%	100%
	Edit	Edit	Edit

Add Participation   Done

4. Click **Add Participation.**

   The Add Resource Participation across Resource Pools dialog box opens.

Add Resource Participation across Resource Pools

| Effective Date: | | |
Resource Pool		% of Time
☒ Shared Developers		
Non-Workload		
Total (Must be 100%)		100

Add Resource Pool   Add   Cancel

5. Type a new distribution of percentages for each resource pool and an **Effective Date** for the redistribution to take effect.

6. Click **Add.** The Manage Resource Pool Participation page opens.

7. Click **Done.** The Manage Pool Capacity page opens.

8. Click **Done.** The 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.

Resource Pool Access Grants

Users are linked to access grants through the security groups to which they belong. The access grants related to resource pools are discussed in more detail in *Table 4-3*. 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 4-3. Resource pool access grants

Access Grant	Description
View Resource Pools	The user can view any resource pool for which they are on the Configure Access page 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.
Edit All resources	The user can edit any resource in the system. This access grant is needed to modify resource participation across resource pools.
Edit only resources that I manage	The user can edit any resource they manage. This access grant is needed to modify resource participation across resource pools.

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.

▶ 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* for more detailed information.

The Configure Access page options are discussed in more detail in *Table 4-4*.

Table 4-4. 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 Header	The user can edit the resource pool's header information, but nothing else.
Edit Unnamed Headcount	The user can edit the lines in the resource pool that specify roles, but nothing else.
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 Resource Pool page.

   If you have permission to modify the resource pool, the **Configure Access** button will be enabled.
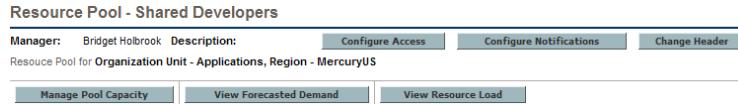
2. Click **Configure Access.**

   The Configure Access for Resource Pool page opens.

3. Add a user to the list by click **Add User** and making a selection from the list.
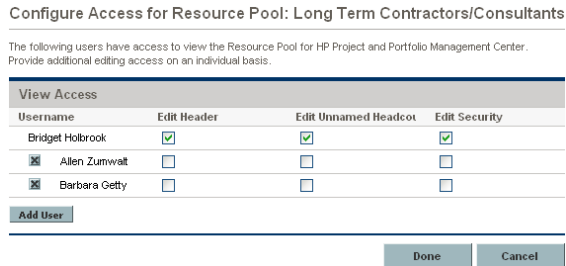
4. Configure each user's access individually by selecting the checkboxes under each category.

   Granting Edit access automatically grants the user View access. See *Table 4-4* for more detailed information on each option.

5. Click **Save.**

Rolling Up Resource Pool Information

Resource pools can be linked to other resource pools in parent/child relationships, establishing a hierarchy of resource pools that can be useful for organization and visualization purposes.

Display of roll-up information is handled in the following ways:

- The View Resource Pool page displays related resource pools, as shown in *Figure 4-3*.

Figure 4-3. View Resource Pool page - Related Resource Pools section

Related Resource Pools		
Resource Pool	Relationship	Primary Organization Unit
Global	Parent	

- The Manage Pool Capacity page displays rolled-up lines from child resource pools.

➤ When a primary organization unit is changed to matrixed, its linked resource pool will be unlinked.

Tracking Demand with Staffing Profiles

Staffing profiles enable a project manager to track the forecast demand of resources, arranged by role. Each line in a staffing profile tracks the FTE, hours, or person days forecast for a role, and, optionally, a resource who possesses that role who is assigned to the position. Staffing profiles include some features that make them simpler to use:

- Staffing profiles can be linked to organization units, projects, proposals, or assets, to tie them to business functions and facilitate meaningful comparison visualizations.

- If the staffing profile is meant to represent workload, the **Workload Category** field allows you to categorize it as such.

- These staffing profile positions are then treated as assignments when visualizing operational capacity. See *Visualizing Assignments* on page 143 for more details.

- New lines in the staffing profile can be set to automatically provide the Resource Pool value using the **Default Resource Pool** field.

- Staffing profile lines can also track actual values.

- Staffing profiles can be synchronized with budgets; lines in the staffing profile become planned labor lines in the associated budget.

- Staffing profile effort allocations can be counted in FTEs, hours, or person days.

Figure 4-4. Staffing Profile page

Table 4-5 describes the configuration options and components of a staffing profile:

Table 4-5. Staffing profile configuration options and components (page 1 of 3)

Item Name	Description
Staffing Profile Header Information	
Name	The name of the staffing profile.
Configure Access	Allows you to configure access to the staffing profile. See *Using the Configure Access Page* on page 86.
Configure Notifications	Select the type of notification a staffing profile manager receives. See *Modifying Staffing Profile Notifications* on page 82.
Change Header	Change the information displayed in the header of the staffing profile. See step 3 on page 77 for a description of the fields.
This staffing profile is for __	Displays what the staffing profile is associated with **(Asset, Org Unit, Proposal, Freestanding,** or **Project)** and its name.
Status	The status of the staffing profile.
Description	A description of the staffing profile.
Created On	The date the staffing profile was created.
Created By	The user who created the staffing profile.
Work Load Category	The category of work being tracked by the staffing profile.
Region	The geographic region in which the staffing profile is used; determines holiday schedule.
Profile Start	The starting date for the staffing profile.
Profile Finish	The ending date for the staffing profile.
Default Resource Pool	When adding a line to the staffing profile, the **Resource Pool** field will be automatically defaulted with this value.

Table 4-5. Staffing profile configuration options and components (page 2 of 3)

Item Name	Description
Allocation Detail	
Enter Allocation In	Allows you to choose the time period breakdown for the staffing profile. Possible values: **Weeks, Month, Quarters, Year**
FTE/Hours/ Person Days	Allows you to choose between entering allocations in Full Time Equivalents (FTE), hours, or person days.
Add a Position	Opens a window allowing you to add a line to the staffing profile. See step 6 on page 80.
Send Resource Requests	Requests for resources appear in the resource request queue of the resource pool. Resource managers can then make assignments to the staffing profile. See *Sending Resource Requests from a Staffing Profile* on page 83.
Import Positions	Copies the positions from the staffing profile selected using the auto-complete. See the **Position** field below for a description of positions. See *Importing Positions into a Staffing Profile* on page 81.
Compare to Work Plan	Opens the Analyze Staffing for Project page, which compares staffing profile allocations to work plan assignments. This is only available for staffing profiles that are attached to projects. See *Comparing a Project's Assignments to its Staffing Profile* on page 100.
Position	The position defines the needed role, skills, and additional resource attributes, along with the forecasted resource FTEs and any named assignments made.
Status	The status of the position's assignment.
Resource Pool	The resource pool the position draws from. This is determined by the last action taken on the position.
[period totals]	The total hours for each month being projected in the staffing profile. If FTEs or person days are being used, the field appears as Period Average.

Table 4-5. Staffing profile configuration options and components (page 3 of 3)

Item Name	Description
Check all	Select this checkbox to select all unmet demand. Unselect this checkbox to unselect all unmet demand.
Assign	Assign one or more resources to the selected unmet demand. See *Making Assignments* on page 90 for more information.
Resource Finder	Use the Resource Finder to search for a resource. See *Making Assignments* on page 90 for more information.
Reject	Reject a request for the selected unmet demand. See *Rejecting and Forwarding Demand* on page 92 for more information.
Forward	Forward a request to another resource pool. See *Rejecting and Forwarding Demand* on page 92 for more information.
Export Staffing Profile	Export the staffing profile page to a Microsoft Excel file.
Notes	
Add Notes	Allows you to add any notes on the staffing profile itself.

Using Staffing Profiles: General Walkthrough

When putting together a project, the project manager should create a staffing profile, which allows her to plan resource usage for that project. Each line in the staffing profile represents a position for a resource with a specific role that needs to be filled. When the project manager is finished making her resource usage forecasts, she sends them to the resource manager as resource requests from her staffing profile. Each resource request is submitted against a specific resource pool. See *Sending Resource Requests from a Staffing Profile* on page 83 for more details on this process.

The resource manager receives these resource requests as alerts on the Resource Pool Overview page for a resource pool he manages, and proceeds to the relevant staffing profile or Resource Allocation Management page to begin making assignments. The Resource Request portlet can also be configured to

display resource requests across resource pools. See *Assigning Resource Pool Resources* on page 89 for more details on this process.

> A resource must be in a resource pool in order to be assigned to a staffing profile. By default, only the resource pool manager (or a manager of a parent resource pool) is permitted to make that assignment. To allow a project manager to assign any resource (from any resource pool) to a work plan, staffing profile, or both, set the `RM_OVERRIDE_ASSIGNMENT_CONTROLS` parameter in the `server.conf` file on the PPM Server to `TRUE`.

Once assignments have been made and the project has been started, the project manager can begin entering actual effort amounts into staffing profile positions. The project can also be configured to roll up actual effort amounts from the work plan into the staffing profile as work is completed. See the *HP Project Management User's Guide* for more detailed information on configuring project settings.

Creating a Staffing Profile

To create a staffing profile:

1. Log on to PPM Center.

2. Select **Project Management > Staffing Profiles > Create a Staffing Profile** from the menu bar.

   The Create a Staffing Profile page opens.

   Create a Staffing Profile

'Name:	
Description:	
Manager:	Admin User

'Start Period:		Status:	In Planning
'End Period:		'Region	MercuryUS
Work Load Category:	Strategic Projects		

   This staffing profile should show as work load: ⦿ Yes ○ No

   Copy positions from existing staffing profile:

   'This is a Freestanding **Staffing Profile**

   Default Resource Pool:

   Synchronized with Budget ○ Yes ⦿ No

   Budget Name:

   [Create]

3. Provide data for all required fields **(Name, Start Period, End Period, Region,** and **This is a __ Staffing Profile)** and any optional fields.

Field Name	Description
Name	The name of the staffing profile.
Description	A description of the staffing profile.
Manager	The user responsible for the staffing profile
Start Period	The starting period (a fiscal month) for the staffing profile.
End Period	The ending period (a fiscal month) for the staffing profile.
Status	The status of the staffing profile. • **In Planning:** The staffing profile is being developed. • **Active:** The staffing profile is available to execute. • **Completed:** The staffing profile has completed execution. • **Cancelled:** The staffing profile has been cancelled.
Region	The geographic region in which the staffing profile is used; determines holiday schedule.
Work Load Category	The category of work being tracked by the staffing profile.
This staffing profile should show as work load	If selected, the Full Time Equivalents set in the staffing profile will be counted as actual work assignments in the HP Resource Management Analyze Assignment Load capacity visualization.
Copy positions from existing staffing profile	Copies the positions from the staffing profile selected using the auto-complete.
This is a __ Staffing Profile	Defines whether the staffing profile is associated with an **Asset, Org Unit, Proposal, Freestanding,** or **Project.**

Field Name	Description
Default Resource Pool	When adding a line to the staffing profile, the **Resource Pool** field will be automatically defaulted with this value.
Synchronized with Budget	Defines whether the staffing profile lines are rolling up to a budget.
Budget Name	The name of the budget the staffing profile is synchronized with.

At this point, you should decide the following:

- Whether lines in the staffing profile count as workload

- Whether to copy positions from an existing staffing profile, and if so, which one

- Whether the staffing profile is linked to an organization unit, asset, project, or proposal

- Whether the staffing profile will request resources from a particular resource pool by default, and if so, which one

- Whether the staffing profile's lines will synchronize with a budget, and if so, which one

4. Click **Create.**

The Staffing Profile page opens.

5. Click the links above the Allocation Detail section to set the time periods and units in which you want to provide allocations.

6. Add positions (lines) to the staffing profile.

   a. Click **Add A Position.** The Add Position dialog box opens.

   b. Specify a **Role Required, Name,** and **Resource Pool** for the staffing profile line.

   c. (Optional) Provide data for any optional fields.

   d. Type the assignments needed for each time period.

      To save time, you can highlight a cell by clicking it and then using `Shift + click` to fill a range of other cells in the same row with the value it contains.

   e. Click **Add.**

      The Staffing Profile page reloads with the staffing profile line added.

   f. Repeat as necessary.

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

7. Click **Done.**

Importing Positions into a Staffing Profile
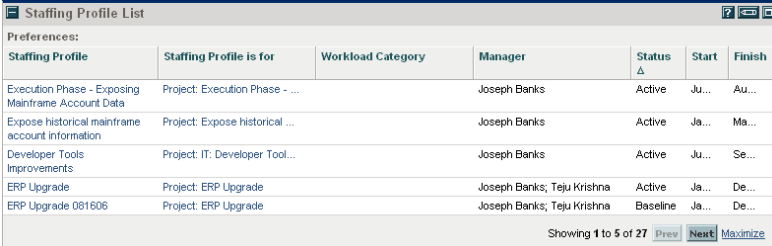
If you have created positions in a staffing profile that you want to use in a new or existing staffing profile, you can import these positions.

1. Open the staffing profile in which you want to add positions.

2. Click **Import Positions.**

3. From the Import Positions dialog, select the staffing profile from which to copy positions. The number of positions that will be imported from the selected staffing profile is displayed.

4. Click **Import.**

Viewing Staffing Profiles

Staffing profiles can be reached most easily from the Staffing Profile List portlet.

Figure 4-5. Staffing Profile List portlet

Users with the View or Edit access to staffing profiles can add the Staffing Profile List portlet to their PPM Dashboard.

You can also reach staffing profiles by using the Search Staffing Profiles page. The Search Staffing Profiles page is opened by selecting **Project Management > Staffing Profiles > Search Staffing Profiles** from the menu bar.

Figure 4-6 shows the Search Staffing Profiles page and some of its key features.

Figure 4-6. Search Staffing Profiles page

Modifying Staffing Profile Notifications

Notifications allow staffing profile managers to be notified (by email) when resource requests are forwarded or rejected, and resources are allocated. By default, staffing profile notifications are set to notify a staffing profile manager when a resource request message is rejected, a resource is committed, a committed resource changes to soft booked or is removed, and when the start date, end date or FTEs of a committed resource is adjusted.

To modify staffing profile notifications:

1. Open a staffing profile.

2. In the Staffing Profile page, click **Configure Notifications.**

3. Select or unselect the check box for the level of notification you desire.

4. Click **Save.**

Sending Resource Requests from a Staffing Profile

When you are creating a staffing profile, its lines represent forecasts for roles that lack a specific resource. Once you have finished creating the staffing profile, you can send assignment requests to the resource pools specified in each staffing profile line. Assignment requests will appear for each resource pool, for the resource manager to fill.

Figure 4-7. Resource pool with unfilled resource requests

To send assignment requests for your staffing profile:

1. Create a staffing profile with positions.

2. In the Staffing Profile page, click **Send Resource Requests.**

   The Send Assignment Requests dialog box opens.

3. Select the checkbox next to each position for which you want to send an assignment request.

4. Specify a date by which a response should be made in the **Response Needed** date field.

5. Click **Send.**

   The assignment requests are sent to the appropriate resource pools. See *Assigning Resource Pool Resources* on page 89 for details on what happens once assignment requests have been made.

Staffing Profile Security

Access to a staffing profile is controlled primarily through access grants set in the security group definitions. For further granularity, 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.

A staffing profile attached to a project can be viewed by everyone participating in that project who has the proper access grants (see *Staffing Profile Access Grants*), without necessarily appearing on the list specified for the staffing profile using the Configure Access page (see *Staffing Profile Configure Access Page*). This includes project process participants and project participants (users who are assigned to tasks in the work plan, or who are specified on the staffing profile itself). In addition, project managers can edit staffing profiles attached to their projects. The same type of access applies to staffing profiles attached to proposals and assets, for users of HP Portfolio Management.

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 4-6*. 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, or are a participant in the project the staffing profile is attached to (if any).

- For more information on access grants and security groups, see the *Security Model Guide and Reference.*

- For more information on project and project process participants, see the *HP Project Management User's Guide.*

Table 4-6. 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.

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.

➤ 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, unless the staffing profile is attached to a project in which the user participates. See *Staffing Profile Access Grants* for more detailed information.

The Configure Access page options are discussed in more detail in *Table 4-7*.

Table 4-7. 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 Header	The user can edit the fields in the staffing profile header section, but not the staffing profile lines, nor change periods.
Edit Positions	The user can edit the staffing profile lines, but nothing else.
Edit Assignment Actuals	The user can edit actuals on staffing profile lines, but nothing else.
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 staffing profile.

   If you have permission to modify the staffing profile, the **Configure Access** button will be enabled.

2. Click **Configure Access.**

   The Configure Access for Staffing Profile page opens.

3. Add a user to the list by click **Add User** and making a selection from the list.

4. Configure each user's access individually by selecting the checkboxes under each category.

   Granting Edit access automatically grants the user View access. See *Table 4-7* for more detailed information on each option.

5. Click **Save.**

Using Other Staffing Profile Features

Staffing profiles have other features that are useful for resource managers.

Staffing Profiles and HP Portfolio Management

HP Portfolio Management allows you to create proposals, projects, and assets to build and monitor your portfolio. If a staffing profile is associated with one of these HP Portfolio Management entities (proposal, project, or asset), then the dates on that staffing profile are determined by the entity to which it has been linked. If the dates for that entity change, the staffing profile's start and finish dates are also altered.

Default Resource Pools for Staffing Profiles

The **Default Resource Pool** field is used to specify a default resource pool from which a staffing profile makes requests. This can be a convenient way to save time when creating new lines for a staffing profile.

Synchronizing Budgets and Staffing Profiles

HP Financial Management allows you to create budgets to organize and track costs. You can synchronize a staffing profile to an existing budget, creating lines in the budget for planned labor costs that are automatically calculated using cost rate rules from the positions and position forecasts in the staffing profile.

For more details on cost rate rules, see the *HP Financial Management User's Guide.*

If you decide to synchronize the staffing profile with a different budget, the labor lines created in the old budget will be automatically deleted and the link removed.

To synchronize a staffing profile with a budget:

1. Open an existing staffing profile and click **Change Header.**

2. Select the **Yes** option for **Synchronized with Budget.**

3. In **Budget Name,** choose a budget.

4. Click **Done.**

Entering Actuals Directly

You can enter actual load or effort for a position directly from the staffing profile.

1. Open an existing staffing profile.

2. Click on a position for which you want to enter actuals.

3. In the Assignments Needed table, scroll down to the user for which you want to enter actuals and enter the actual effort.

4. If you want to add actuals for additional users, click **Save.** Otherwise, click **Done** to save your data and exit the dialog.

The actual effort can be viewed in the Analyze Assignment Load portlet.

If the staffing profile is associated with a project, the actual effort can be used to track resource usage. This is controlled through the projects settings in the **Cost and Effort** policy. For more information on project settings and policies, see the *HP Project Management User's Guide*.

Allocation Time Period Adjustment

When a project (with a staffing profile associated with it) changes its start/end date, the last viewed allocation time period (either hours or FTE) is maintained while the non-viewed allocation is adjusted. For example, if a project (starting in January and ending in February, viewed in FTEs with one FTE per month) is adjusted back by one month (starting in December and ending in January), the allocation time period for each month is maintained at 1 FTE per month while the hours are adjusted to equal 1 FTE per month. Or, if the project (for the month of January is viewed in hours with 80 hours) is adjusted ahead by one month (to February), the allocation time period for February is maintained at 80 hours while the FTE is adjusted to equal 80 hours.

Assigning Resource Pool Resources

When a staffing profile is created, its positions represent needed roles without resources specified. After creating a staffing profile, a project manager can send resource assignment requests from the staffing profile to the various resource pools specified in each staffing profile position (see *Sending Resource Requests from a Staffing Profile* on page 83 for details). The resource manager can then review the assignment requests for each resource pool and go into each staffing profile, making the appropriate assignments for each line.

Collecting Resource Requests

To view resource requests, open the Resource Pool page for any resource pool. All resource assignment requests submitted against a resource pool appear on the Resource Pool page.

Figure 4-8. Resource pool with unfilled resource requests

You can also view resource requests by adding the Resource Request portlet to your PPM Dashboard or from the Resource Allocation Management page. The Resource Request portlet displays collections of resource requests filtered by resource pool manager, staffing profile, or role (fulfilled or partially assigned requests are not displayed in the resource requests list). The Resource Allocation Management page displays resource requests sorted by staffing profile or position.

Click on the name of a resource pool to open its Resource Pool page.

Making Assignments

To fill a resource assignment request:

1. Open a resource pool.

2. In the Resource Requests section of the Resource Pool page, click on the name of a staffing profile.

   The Staffing Profile page opens. Positions with open resource assignment requests display an Unmet Demand message in orange. The position requesting resources will be selected.

3. Assign one or more resources in one of the following ways.

- From the Staffing Profile page, do one of the following:

  o Click **Assign** to assign one or more resources.

  o Click the Resource Finder icon to search for a suitable resource using the Resource Finder.

  The Resource Capacity with Assignments dialog box opens, displaying the selected resource's current capacity with the staffing profile line's commitments marked as **Soft Booked.**

- From the Resource Allocation Management page, click the pull-down menu next to the position to assign and select **Assign.**

4. Make any changes to the resource's commitment to the staffing profile line.

- You can change the nature of the resource's commitment between **Soft Booked** and **Hard Booked,** or you can remove it entirely.

- You can change the number of hours committed to the staffing profile.

- If the resource pool is configured to send notifications to a resource, you can choose not to send an email notification.

5. Click **Done.**

The Staffing Profile page reloads with your changes made. If unmet demand still remains, you can repeat the assignment process as needed.

➤ A resource must be in a resource pool in order to be assigned to a staffing profile. By default, only the resource pool manager (or a manager of a parent resource pool) is permitted to make that assignment. To allow a project manager to assign any resource (from any resource pool) to a work plan, staffing profile, or both, set the RM_OVERRIDE_ASSIGNMENT_CONTROLS parameter in the server.conf file on the PPM Server to TRUE.

You can only make assignments from the resource pool specified by the originating requests when using the **Assign** button, but you can assign resources from other resource pools that you manage by using the Resource Finder. The specified resource pool includes resources from its child resource pools.

Rejecting and Forwarding Demand

Resource demand that comes from staffing profiles can be rejected from a particular resource pool outright, or forwarded to a different resource pool for assignment.

When making assignments to a staffing profile in response to resource assignment requests, the **Reject** and **Forward** buttons appear next to the **Assign** button and Resource Finder icon on the staffing profile.

To reject unmet resource demand for a staffing profile line:

1. Select the checkbox next to the unmet demand for the staffing profile line(s) you wish to reject.

2. Click **Reject.**

   The Reject Request for Unmet Demand dialog box opens.

3. Supply a reason for rejecting the resource demand in the **Comments** field and click **Done.**

To forward unmet resource demand for a staffing profile line to a different resource pool:

1. Select the checkbox next to the unmet demand for the staffing profile line(s) you wish to forward.

2. Click **Forward.**

   The Forward Request to Another Pool dialog box opens.

3. Specify a resource pool in the **Forward to Resource Pool** field.

4. Supply a reason for forwarding the resource demand in the **Comments** field and click **Done.**

You can also reject and forward demand from the Resource Allocation Management page. See *Rejecting Resource Requests from the Resource Allocation Management Page* on page 115 and *Forwarding Resource Requests from the Resource Allocation Management Page* on page 114 for more information.
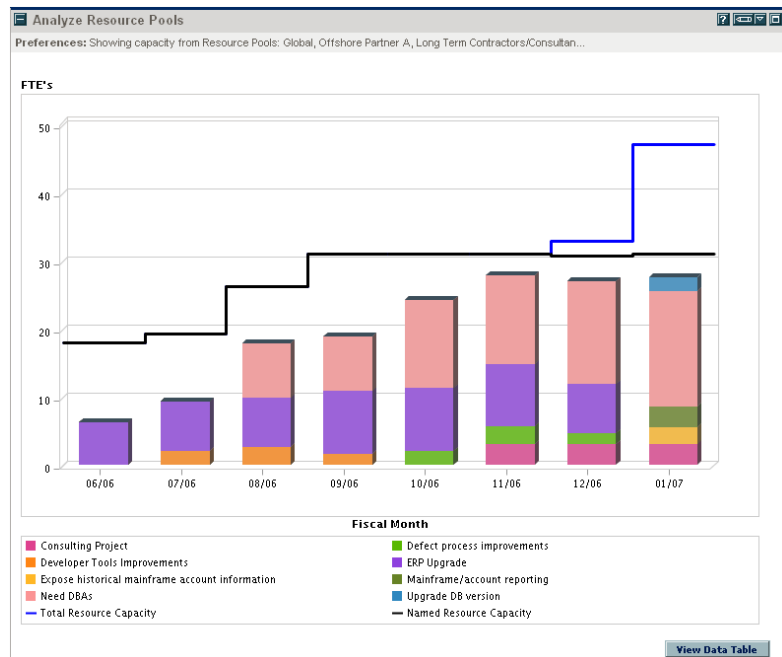
Analyzing Resource Pools

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.

Comparing Resource Pools to Staffing Profiles

The Analyze Resource Pools portlet 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 4-9* shows the Analyze Resource Pools portlet.

Figure 4-9. Analyze Resource Pools portlet

Key features of the Analyze Resource Pool portlet include:

● The blue line represents the total capacity of the resource pool or pools being analyzed

● The black line represents the total named capacity of the resource pool or pools being analyzed

● Bars on the chart represent resource allocations from staffing profiles by period, which can be split internally by staffing profile or status

The Analyze Resource Pools portlet can be filtered using the parameters described in *Table 4-8*.

Table 4-8. Analyze Resource Pools portlet - parameters (page 1 of 2)

Field Name	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 Role	A multi-select auto-complete field that selects a role or set of roles to display from the resource pools and staffing profiles being analyzed.

Table 4-8. Analyze Resource Pools portlet - parameters (page 2 of 2)

Field Name	Description
Time Period	
Period	Selects the time period being used by the Analyze Resource Pools portlet such as **Weeks, Day, Quarters, Month,** or **Year.**
Display (x) past periods	Selects up to 20 time periods before the current date to include in the Analyze Resource Pools portlet. If the period is yearly, selects up to 12 time periods. 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 portlet. If the period is yearly, selects up to 8 time periods.
Arrange Data	
Group By	Determines whether to display the results by **Staffing Profile** or **Assignment Status.**

To get a breakdown of total resource capacity viewed against load by staffing profile, click **View Data Table.** The Analyze Resource Pools Breakdown table, pictured in *Figure 4-10*, opens in a new window.

▶ For parent resource pools, the capacity line includes the FTEs from all child resource pools as well, meaning all roll-up lines are included. Similarly, the resource allocation bars represent all staffing profiles that draw from the child resource pools.

Figure 4-10. 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.

You can have multiple instances of this portlet on your PPM Dashboard, for keeping track of different resource pools.

Analyzing Staffing Profiles Associated with Projects

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.

Automatic Tracking of Actuals for Staffing Profiles

If a staffing profile is associated with a project, you can set it to roll up values for Actual Effort directly from the work plan. This is controlled through the project settings, in the **Cost and Effort** policy. For more information on project settings and policies, see the *HP Project Management User's Guide*.

► A staffing profile can only be associated with one project, and vice versa.

The roll-up of Actual Effort values from a work plan works thusly:

● Actual FTE values are calculated from the Actual Effort tracked on the work plan's tasks. The actual effort values appear only in the Analyze Staffing Profile page.

● The Analyze Staffing Profile page shows the scheduled and actual effort from the project's work plan, grouped by either resource or role.

● When viewing the Analyze Staffing Profile page grouped by resource, if a resource is not yet assigned to a task, the roll-up of scheduled effort will appear in the unassigned collection.

● When viewing the Analyze Staffing Profile page by role, the scheduled and actual effort appears under the role specified on the task.

► A staffing profile for a project must be created from that project's Project Overview page.

To create a staffing profile for a project:

1. Log on to PPM Center.

2. From the menu bar, select **Search Projects** and open the project you want.

3. Click **Project Settings** and click on the **Cost and Effort** policy.

➤ The Cost and Effort policy may not be editable. If not, you cannot modify the project's Cost and Effort settings unless you modify the project type that governs the project. See the *HP Project Management User's Guide* for more detailed discussion of how project types govern project settings through project policies.

4. Select **Staffing Profile represents the work load imposed by the project.**

5. Select **Use actual information from the work plan and Time Management when viewing actuals in the staffing profile.**

6. Click **Save.**

7. In the **Project Staffing** section of the Project Overview page, click **Create a Staffing Profile.**

   The Create a Staffing Profile page opens.

8. Provide data for required and optional fields and click **Create.**

   You can copy positions from an existing staffing profile by specifying them in the **Copy positions from existing staffing profile** auto-complete.

Automatic Tracking of Actuals with HP Time Management

A staffing profile linked to a project can roll up even more accurate Actual Effort data if HP Time Management has been enabled and is properly set for the project. For more details on HP Time Management, see the *HP Time Management User's Guide.*

The **Cost and Effort** policy in the project's settings determines whether or not financial data is tracked for a project, and how actuals are to be calculated, if at all. The **Cost and Effort** policy also determines how HP Time Management is used to track effort, if HP Time Management has been enabled for the system.

Figure 4-11. Project Settings: Cost and Effort policy

Once HP Time Management is activated for the project, the Actual Effort values entered will roll up into the staffing profile, assuming the staffing profile is set properly (see *Automatic Tracking of Actuals for Staffing Profiles on page 97*).

To set HP Time Management to track Actual Effort for a project:

1. Log on to PPM Center.

2. From the menu bar, select **Search Projects** and open the project you want.

3. Click **Project Settings** and click on the **Cost and Effort** policy.

   ➤ The Cost and Effort policy may not be editable. If not, you cannot modify the project's Cost and Effort settings unless you modify the project type that governs the project. See the *HP Project Management User's Guide* for more detailed discussion of how project types govern project settings through project policies.

4. Select **Use Time Management to track actual effort against this project.**

5. Select the appropriate level of the work plan to track.

6. Click **Save.**

Comparing a Project's Assignments to its Staffing Profile

The Analyze Staffing for Project page, pictured in *Figure 4-12*, compares capacity (as the active staffing profiles for a project) to assignments within the associated project's work plan, viewable by role or by resource. It can be used to monitor compliance of the work plan and actuals to organizationally agreed-upon staffing levels for the project. Open it by clicking **Compare to Work Plan** in the Staffing Profile page.

Figure 4-12. Analyze Staffing for Project page

Compare to Work Plan For Project ERP Upgrade   [Done]

View By: Role | Resource   ⊞® Export to Excel

Staffing Details by Roles (Shown in Hours)

Role	Q1 '06			Q2 '06			Q3 '06			Q4 '06		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
DBA												
Forecast	336.0	304.0	368.0	320.0	352.0	352.0	320.0	368.0	320.0	352.0	336.0	320.0
Allocation	336.0	304.0	368.0	320.0	352.0	352.0	320.0	368.0	320.0	352.0	336.0	320.0
Scheduled Effort						40.0	48.0	184.0				
Actual Effort												
Developer - Database												
Forecast												
Allocation												
Scheduled Effort				40.0	64.0	64.0	16.0					
Actual Effort												
Developer - Interactive Design												
Forecast												
Allocation												
Scheduled Effort								24.0				
Actual Effort												
Senior Developer												
Forecast	504.0	456.0	552.0	480.0	528.0	528.0	480.0	552.0	480.0	528.0	504.0	480.0
Allocation	504.0	456.0	552.0	480.0	528.0	528.0	480.0	552.0	480.0	528.0	504.0	480.0
Scheduled Effort						280.0	232.0	24.0				
Actual Effort												
Network Administrator												
Forecast	42.0	38.0	46.0	40.0	44.0	44.0	40.0	46.0	40.0	44.0	42.0	40.0
Allocation	42.0	38.0	46.0	40.0	44.0	44.0	34.0					
Scheduled Effort												
Actual Effort												
QA Engineer												
Forecast				160.0	176.0	176.0	320.0	368.0	640.0	704.0	672.0	320.0
Allocation				160.0	176.0	176.0	160.0	184.0	320.0	352.0	336.0	160.0
Scheduled Effort						112.0	624.0	104.0				
Actual Effort												
Unspecified Role												
Scheduled Effort				9,657.6	9,286.3	7,744.1	3,264.0	2,504.0	1,280.0	7,120.0	5,200.0	
Actual Effort												

[Done]

The data in the Analyze Staffing for Project page can also be exported to a Microsoft Excel file for use in presentations or for further analysis. To export the Analyze Staffing for Project page to a Microsoft Excel file, click the **Export to Excel** link.

➤ If you are having problems with the data in Excel, you may need to configure the Internet options of your Web browser. See the *HP Project Management User's Guide* for more information.

Analyzing Staffing Profiles Associated with Assets

If a staffing profile is associated with an asset, you can:

- collect actuals from a time sheet and roll them up into the staffing profile,

- view actuals entered against an asset, and

- view resource load that includes time logged against an asset.

Rolling up Time of an Asset to a Staffing Profile

If the request type of an asset request is configured to use HP Time Management to track actuals (actuals are collected from the asset's time sheet), time is rolled up to the staffing profile of the asset.

Viewing Actuals

If a staffing profile is associated with an asset, you can view a table that contains the breakdown of the actuals entered against the asset:

1. Open the staffing profile.

2. Click **View Actuals.**

The table displays actuals and assigned loads for resources who have entered time against the asset associated with the staffing profile.

The actuals are not limited by the staffing profile period.

Analyze Assignment Load Portlet

If a staffing profile is associated with an asset, the Analyze Assignment Load portlet includes time logged against an asset (time logged against asset requests is counted as actual effort).

Managing Resource Allocation

Resource allocation management enables the resource pool manager to assess and manage resources and resource requests for a single resource pool from a quick edit page.

From the Resource Allocation Management page, you can:

- Allocate resources to staffing profile position requests

- Assess total capacity, committed and soft-booked allocations, and remaining capacity of a single resource pool

- View all resource requests and balance resource allocation across projects

- Make changes and view their impact before saving them

Accessing the Resource Allocation Management Page

You can access the Resource Allocation Management page from two different locations in the interface.

- From the menu bar:

  a. Select **Resource Management > Resources > Manage Allocation.**

  b. Select a resource pool by clicking **Select a Resource Pool** or **Please Specify a Resource Pool.**

- From the Resource Pool Overview page: click **Manage Allocation.**

➤ You must be the manager of at least one resource pool in order to access the Resource Allocation Management page.

The Resource Allocation Management page loads data once. If the data is modified by another user (outside of the current Resource Allocation Management page or using another instance of the Resource Allocation Management page), the data on the current Resource Allocation Management page is not updated. If any modifications you make collide with modifications saved by another user, your modifications are not saved. You must exit and

reload the Resource Allocation Management page and re-enter your data. To avoid these collisions, you should save your modifications often.

Interpreting the Resource Allocation Management Page

Figure 4-13. Resource Allocation Management page

The following table describes the data that displays in the Resource Allocation Management page. The data is only for the selected resource pool and changes dynamically when a resource allocation is modified.

Table 4-9. Data displayed in the Resource Allocation Management page (page 1 of 2)

Time Period Data	Description
Position: Forecast	The anticipated demand for a staffing profile position. This information is located in the first column of a time period section for a staffing profile position.
Position: Unmet Demand	A position with open resource assignment requests. This information is located in the second column of a time period section for a staffing profile position. Unmet Demand = Forecast − Resource Allocations

Table 4-9. Data displayed in the Resource Allocation Management page
(page 2 of 2)

Time Period Data	Description
Resource: Allocation	Modifiable capacity of a resource allocated to a staffing profile position. This information is located in the first column of a time period section for a resource.
Resource: Remaining Capacity	The available capacity of a resource. A number displayed in red denotes an overallocation of a resource's effort. If the resource is assigned to more than one staffing profile, allocations for the other staffing profiles are reflected in this number. This information is located in the second column of a time period section for a resource. Remaining Capacity = Resource Capacity − Resource Allocations
Projected Resource Pool Utilization	The allocation and capacity for the selected resource pool. Click ⊞ to view the data. This information changes dynamically when resource allocations are modified. **NOTE:** Loading this data may cause system performance to decrease. This data never includes resources of child resource pools. Selecting the **Include children resource pools when calculating the resource load for this resource pool** check box (from the Edit Resource Pool page) does not affect the data on the Resource Allocation Management page. See *Viewing Projected Resource Pool Utilization from the Resource Allocation Management Page* on page 117 for more information.

Filtering and Sorting the Resource Allocation Management Page

Filtering allows you to modify the information displayed in the Resource Allocation Management page. Quick filters are used to select a single item on which to filter. The advanced filter allows you to filter on multiple items. The time period filter allows you to filter on a start and end period. You can also sort the information by staffing profile and staffing profile position.

The filters currently applied to the Resource Allocation Management page are displayed at the top of the table along with the time the page was opened. If the list of applied filters is truncated, placing the cursor on the filter displays a tooltip that shows all of the applied filters.

> All resources of a filtered position are displayed. That is, results are filtered by position, not resource status. For example, if Resource A of Position 1 is soft-booked, Resource B of Position 1 is committed, and Resource C of Position 1 is committed, Position 1 is a soft-booked position. If you filter on soft-booked, Position 1 is displayed and includes Resource A, Resource B, and Resource C.

Quick Filters

Use the quick filters to select a single item on which to filter for the selected resource pool (choose an item from the Filter For menu).

Table 4-10. Quick filters for the Resource Allocation Management page
(page 1 of 2)

Quick Filter	Description
All	Displays all positions that have a resource allocated (soft-booked or committed) or a resource with forecast demand (whose position status is not new).
Not Fulfilled	Displays all positions for which resources have been requested, soft-booked, or partially assigned. By default, this filter is selected when the Resource Allocation Management page is opened.
Requested	Displays all positions for which resources have been requested.
Soft Booked	Displays all positions for which resources are soft-booked. Soft-booked positions contain soft-booked resources from the selected resource pool (and include forwarded requests).

Table 4-10. Quick filters for the Resource Allocation Management page
(page 2 of 2)

Quick Filter	Description
Partially Assigned	Displays all positions for which resources are partially assigned. Partially assigned positions have all resources committed and there is unmet demand. If one or more resources are not committed (that is, one or more resources are soft-booked), the position is considered soft-booked. Partially assigned positions do not include positions whose resource request is partially allocated from the selected resource pool and the remaining portion of the request has been forwarded.
Staffing Profile	Displays all positions of the staffing profile(s) you select from the dialog.
Resource	Displays all positions of the resource(s) you select from the dialog.

Advanced Filter

Use the advanced filter to select multiple items on which to filter the Resource Allocation Management page. To set the advanced filter, do the following:

1. Open the **Filter For** menu.

2. Select **Advanced.**

The Search for Staffing Profile Positions dialog displays.

3. Enter the information for one or more fields on which you want to filter.

Field Name	Description
Position Status	Select one or more position statuses. This filter displays all staffing profile positions that have an assigned resource whose status matches the selected status(es). Choices include: New, Requested, Partially Assigned, Soft Booked, Fulfilled, and Rejected.
Staffing Profile Status	Select one or more staffing profile statuses. This filter displays all staffing profile positions whose staffing profile status matches the selected status(es). Choices include: Active, In Planning, and Completed. Note that Cancelled, Approved, and Baselined are not available.
Role	Select one or more roles. This filter displays data for staffing profile positions that contain the selected role(s).
Skill	Select one or more skills. This filter displays data for staffing profile positions that contain the selected skill(s).
Staffing Profile Manager	Select one or more staffing profile managers. This filter displays data for staffing profile positions controlled by the selected staffing profile manager(s).
Position Name (contains)	Enter a text string. This filter displays data for staffing profile positions that contain the entered text in the position name.
Resource Type	Select one or more resource types. This filter displays data for staffing profile positions that contain the selected resource type(s).
Resources	Select one or more resources. This filter displays data for staffing profile positions that contain the selected resource(s).
Staffing Profile	Select one or more staffing profiles. This filter displays data for staffing profile positions contained in the selected staffing profile(s).

4. Click **Search.**
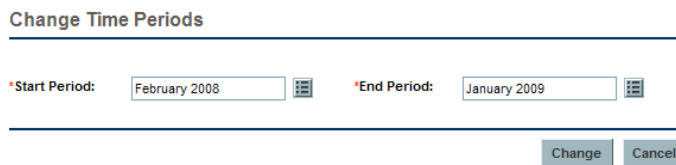
Time Period Filter

`Showing from <date> to <date>` is the time period of the data displayed. The default time period displayed is one year, starting one month prior to the current month.

To change the time period, do the following:

1. Click **Change,** located next to the displayed time period (`Showing from <date> to <date>`).

   The Change Time Periods dialog appears.

   Change Time Periods

*Start Period:	February 2008 ▦	*End Period:	January 2009 ▦

   Change   Cancel

2. Enter the Start Period and End Period dates.

Field Name	Description
Start Period	Enter the initial time period from which to start the display of data.
End Period	Enter the final time period for which to end the display of data.

3. Click **Change.**

Sorting by Staffing Profile and Staffing Profile Position

By default, the list of staffing profiles and positions are sorted in alphabetical order by staffing profile. You can also sort by staffing profile position by clicking the Position header. The Sort icon (⏶) appears next to the header of the item on which the sort is taking place.

You can sort the staffing profiles or staffing profile positions in reverse alphabetical order by clicking on the appropriate header.
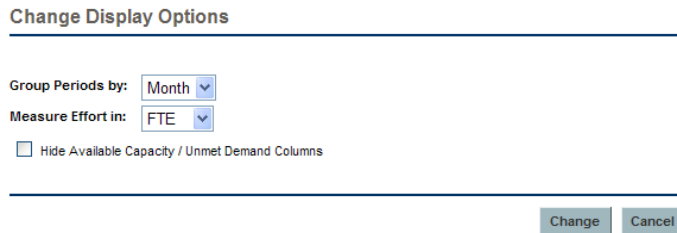
Changing the Display Options of the Resource Allocation Management Page

Display options alter the amount of data displayed in the Resource Allocation Management page. You can change the period type, effort type, and the columns of data displayed.

To modify display options, do the following:

1. Click **Display Options.**

   The Change Display Options dialog displays.

   Change Display Options

   Group Periods by: Month ▾
   Measure Effort in: FTE ▾
   ☐ Hide Available Capacity / Unmet Demand Columns

   Change   Cancel

2. Edit one or more of the following:

Field Name	Description
Group Periods by	The period type (how the time period is divided). Select either Month or Week. Default: The value to which the RM_ DEFAULT_PERIOD_TYPE parameter is set in the `server.conf` file.
Measure Effort in	The effort type (how effort is measured). Select either FTE (full time equivalents) or Hours. **NOTE:** If set to FTE, the position's unmet demand may be calculated incorrectly. Use the unmet demand values from the Staffing Profile page instead. Default: The value to which the RM_DEFAULT_EFFORT_ TYPE parameter is set in the `server.conf` file.
Hide Available Capacity/ Unmet Demand Columns	Select this check box to hide the second column of data (containing unmet demand and remaining capacity) for each time period section. By default, this check box is not selected. If this check box is selected and you assign a resource, the resource's allocations are automatically set to zero. Because the position's unmet demand and the resource's remaining capacity are not calculated, the resource's allocation cannot be calculated and is therefore set to zero.

3. Click **Change.**

Displaying Resources

You can expand and collapse a staffing profile position to display its resources in the Resource Allocation Management page:

- To display all resources of all staffing profiles, click .

- To hide all resources of all staffing profiles, click .

- To display the resources of a staffing profile, click ⊞ next to the staffing profile.

- To hide the resources of a staffing profile, click ⊟ next to the staffing profile.

Displaying Additional Pages of Data

Depending on the filters you select, data may be displayed on more than one page of the Resource Allocation Management page. In the top right corner of the table, you can see how many pages of date are available to view and which page you are viewing.

To go to the next page of data, click **Next.**

To go to the previous page of data, click **Prev.**

If you made changes on the current page, you are prompted to save or discard these changes.

Modifying server.conf Parameters

You can modify parameters in the `server.conf` file to change the maximum number of rows displayed on a single page, the number of staffing profile positions displayed on a single page, the units displayed in the Display Options dialog for measurements, the default unit displayed in the Display Options dialog for groupings and measurements, and the maximum number of resources for which the Projected Resource Pool Utilization summary is calculated.

See the *System Administration Guide and Reference* for more information about editing the `server.conf` file.

Table 4-11. Resource allocation management server.conf parameters

Parameter	Description
RAMP_MAX_RA_PER_PAGE	The maximum number of rows of data to display on a single page. Default: 200.
RAMP_PAGE_SIZE	The maximum number of staffing profile positions to display on a single page. Default: 20.
RM_ALLOWED_EFFORT_TYPES	The effort types from which the resource pool manager can select for the `Measure Effort in` field in the Display Options dialog. Valid values: fte, hours, person days. Default: fte, hours.
RM_DEFAULT_EFFORT_TYPE	The default effort type. The resource pool manager can change the effort type by modifying the `Measure Effort in` field in the Display Options dialog. Valid values: fte, hours, person days. Default: fte.
RM_DEFAULT_PERIOD_TYPE	The default time period section. The resource pool manager can change the time period section by modifying the `Group Periods by` field in the Display Options dialog. Valid values: week, month. Default: month.
RM_MAX_RESOURCE_IN_POOL	The maximum number of resources in a resource pool for which the Projected Resource Pool Utilization summary will be calculated. If the number of resources in a resource pool exceeds this number, you cannot load or view the Projected Resource Pool Utilization summary data. Default: 250.

Assigning Resource Requests from the Resource Allocation Management Page

To assign a resource, do the following:

1. From the Resource Allocation Management page, click [icon] next to the position to assign and select **Assign.**

2. Search for a specific resource and select the resource to assign to the position.

▶ Resources from a child resource pool are not displayed in the auto-complete window.

3. Click **Save.**

▶ You must click **Save** from the Resource Allocation Management Page in order to save any assignments you made.

Forwarding Resource Requests from the Resource Allocation Management Page

To forward a resource, do the following:

1. From the Resource Allocation Management page, click [icon] next to the position to forward and select **Forward.**

   The Forward Request to Another Pool dialog opens.

Forward request to another pool

*Forward to Resource Pool: [   ] [icon]

Name: DBA   Skill Requirements:
Role Required: DBA
Resource Type:

Comments:
[   ]

                                    [Forward] [Cancel]

2. Specify a resource pool in the `Forward to Resource Pool` field.
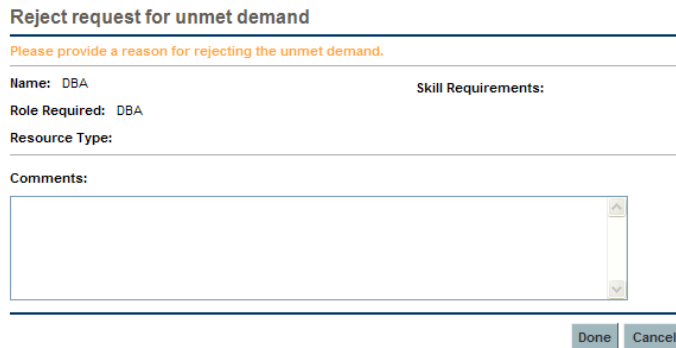
3. Supply a reason for forwarding the resource demand in the **Comments** field.

4. Click **Forward.**

Rejecting Resource Requests from the Resource Allocation Management Page

To reject a resource, do the following:

1. From the Resource Allocation Management page, click [icon] next to the position to reject and select **Reject.**

   The Reject Request for Unmet Demand dialog opens.

2. Supply a reason for rejecting the resource demand in the Comments field.

3. Click **Done.**

Removing a Resource from the Resource Allocation Management Page

A resource that has been assigned to a position can also be removed from that position. To remove a resource, do the following:

1. Click ✖ next to the resource to select it for removal. The resource and its data remain, but are displayed in gray.

2. Click **Save** on the Resource Allocation Management page.

You can re-add a resource that has been selected for removal by clicking ⟳. This icon only appears when a resource has been selected for removal but *before* clicking the **Save** button on the Resource Allocation Management page.

If a resource request has been forwarded to your resource pool and that resource has been assigned to a position, you cannot remove this resource if you do not manage this resource.

Changing Resource Status from the Resource Allocation Management Page

Once a resource has been assigned to a position, you can change the status of the resource to either committed or soft-booked. By default, the status of a resource is soft-booked.

To change the status of a resource:

- Open the menu located to the right of the resource and select a status.

Saving Allocation Data Changes in the Resource Allocation Management Page

If you made changes to and try to save data that has been recently modified by another user (that is, the data displayed in the Resource Allocation Management page is not the most current data), a message displays the data that cannot be saved. You must exit and reload the Resource Allocation Management page and re-enter your data.

To save changes made to the Resource Allocation Management page, click **Save.**

To exit and save any changes made to the Resource Allocation Management page, click **Done.**

To cancel any changes made to the Resource Allocation Management page since the last save, click **Cancel.**

Viewing Projected Resource Pool Utilization from the Resource Allocation Management Page

The Projected Resource Pool Utilization section displays the total capacity, total committed allocations, total soft-booked allocations, and remaining capacity for the resource pool. The data is updated dynamically when resource allocations are modified in the Resource Allocation Management page.

▶ This data never includes resources of child resource pools. Selecting the **Include children resource pools when calculating the resource load for this resource pool** check box (from the Edit Resource Pool page) does not affect the data on the Resource Allocation Management page.

To view the total capacity, total committed allocations, total soft-booked allocations, and remaining capacity, do the following:

- Click ⊞ next to Projected Resource Pool Utilization.

▶ Loading this data may cause system performance to decrease.

Table 4-12. Data displayed in the Projected Resource Pool Utilization section (page 1 of 2)

Time Period Data	Description
Total Capacity	The direct capacity of the selected resource pool. This information is located in the first column of a time period section for the projected resource pool utilization.
Total Committed Allocations	The total number of resources in the selected resource pool committed to a staffing profile.

Table 4-12. Data displayed in the Projected Resource Pool Utilization section (page 2 of 2)

Time Period Data	Description
Total Soft Booked	The total number of resources in the selected resource pool not yet committed to a staffing profile.
Remaining Capacity	The available capacity of the selected resource pool. A number displayed in red denotes an overallocation. This information is located in the second column of a time period section for the projected resource pool utilization. Remaining Capacity = Total Capacity − (Total Committed + Total Soft Booked)

Viewing Information about a Staffing Profile, Resource, or Position from the Resource Allocation Management Page

You can display additional information about a staffing profile, resource, or position by using a tooltip or opening an overview window (staffing profile only).

Viewing Staffing Profile Information

You can view information about a staffing profile in two different ways:

● Place the cursor on a staffing profile to display a tooltip. The following information displays: staffing profile name, status, staffing profile manager, start date, end date, and work load category.

● Click on the staffing profile name to open a Staffing Profile overview page in another window.

➤ The information displayed is for reference only. Do not edit the staffing profile from this window. If you make changes in this window, changes in the Resource Allocation Management page may not be saved.

Viewing Resource Information

To view information about a resource, do the following:

- Place the cursor on a resource to display a tooltip. The following information displays: full name, user name, role, and email address.

Viewing Position Information

To view information about a position, do the following:

- Place the cursor on a position to display a tooltip. The following information displays: position name, status, response needed by, role, resource pool, and resource type.

Changing the Resource Pool Displayed in the Resource Allocation Management Page

If you manage more than one resource pool, you can load the data from another resource pool (including a child resource pool if you are the manager of its parent resource pool):

1. Click **Change** next to the resource pool name at the top of the page.

2. Select the resource pool to view.

You can only view data for one resource pool in the Resource Allocation Management page.

Performance and Other Considerations of the Resource Allocation Management Page

- Do not load the Projected Resource Pool Utilization data unless you must view it. Loading this data may cause system performance to decrease.

- The Mozilla Firefox browser renders tables more efficiently than Microsoft Internet Explorer.

- Save your changes often. This reduces the chance of losing data due to collisions (other users updating the same data at the same time).

- Use the filters to display a small number of positions (20 or less) if you are allocating resources.

- Change the time period to display the smallest period of time possible if you are allocating resources.

5 Using HP Resource Management for Work Plan and Request Execution

Overview of Using HP Resource Management for Work Plan and Request Execution

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

- Finding the most appropriate resources to complete a task or request

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

- **Managers.** Project or team managers use HP Resource Management to analyze resource workload for their teams and take the appropriate actions.

- **Team members.** Team members view their own workload with handy visualizations and spot potential trouble areas.

Workload tracked in HP Resource Management can consist of either project tasks or requests.

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 71 for more information on staffing profiles.

► The system takes into account users' start and end dates in resource capacity calculations and visualizations. For example, a user who is set to leave the company at a certain date cannot be assigned to a task or staffing profile afterward. Likewise, users starting work in the future can be selected for relevant entities scheduled to be active in the future.

Configuring Requests for HP Resource Management

In order to consider requests as work items to be tracked in HP Resource Management, you must associate work item fields with them. See *Setting Up Request Work Item Fields* on page 26 for more detailed information on associating work item fields with requests.

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

A request work item features the fields described in *Table 5-1*.

Table 5-1. Request work item fields (page 1 of 2)

Field Name	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.
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.**)

Table 5-1. Request work item fields (page 2 of 2)

Field Name	Description
Role	The role being used by the **Assigned Resource.**
% 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 HP Resource Management interaction built into them through request type rules and other built-in system functionality. For more information on request type rules, see the *HP Demand Management Configuration Guide* document.

The following work item fields can be safely customized with minimal impact to HP Resource Management functionality:

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

- Workload Category

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 HP 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 role. If the resource has a different role you want to book, you can change the value in the **Role** field.

The request is counted as load against the resource's capacity and will show up in HP Resource Management visualizations, such as the resource Gantt chart on the **Capacity/Load** tab of the View Resource page, pictured in *Figure 5-1*. If the **Workload** flag is enabled, the request will show up in load histograms.

Figure 5-1. View Resource page: Capacity/Load tab
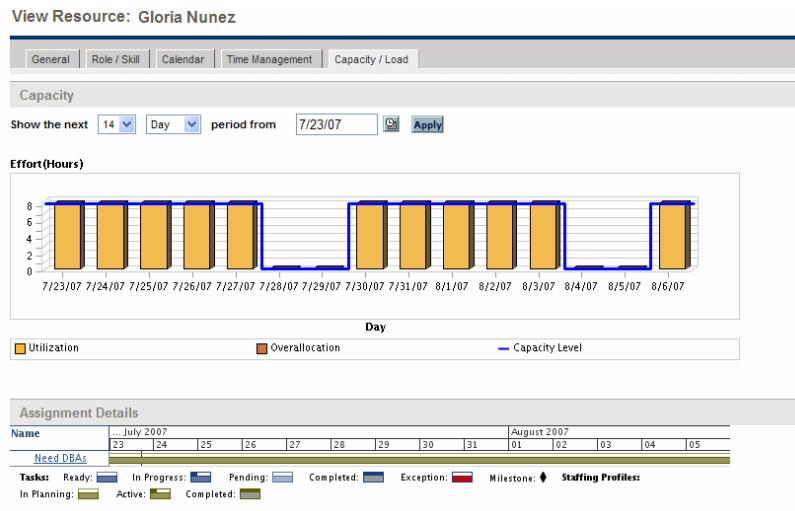
To view your resource Gantt chart, select **Administration > View My Resource Information** from the menu bar in the standard interface and click the **Capacity/Load** tab. The resource Gantt chart can be altered to display a wide range of time periods.

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

A request that is in progress but is 0 percent complete appears as Ready in the Gantt chart.
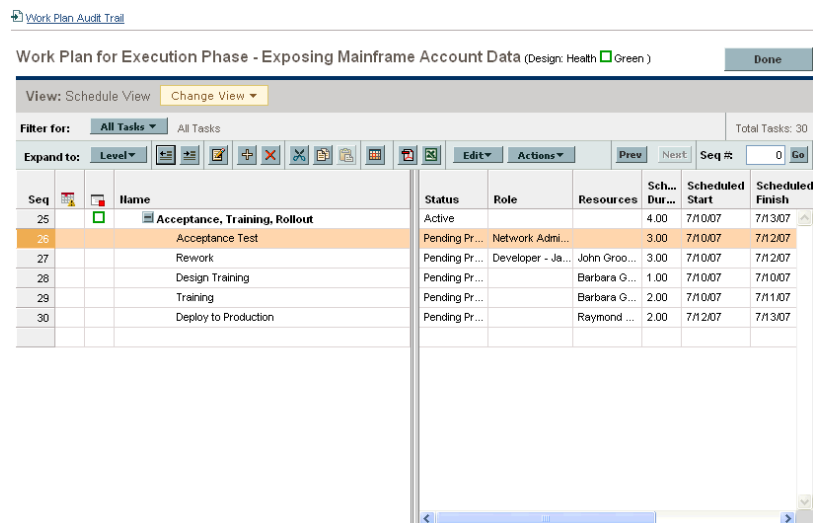
Assigning Tasks

Tasks can be assigned to a role or a specific resource.

Associating Roles with Tasks

When planning a project, tasks can be associated with a specific role prior to booking the exact resource who will complete the task. This can help produce more accurate cost estimates as well as a detailed role load view in the early stages of project plan management.

Figure 5-2. Task with role assigned but no resource

To book a role for a task:

1. Open the work plan.

2. Double-click the task to which you want to assign a role.

   The Task Details page opens.

3. Click the **Resources** tab.

4. Provide a value in the **Assigned Role** field.

5. Click **Save.**

Assigning Resources to Tasks

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 role.

To book a resource for a role other than their primary role:

1. Open the work plan.

2. Double-click the task to which you want to assign a role.

   The Task Details page opens.

3. Click the **Resources** tab.

4. Provide a value in the **Assigned Role** field.

5. Click **Save.**

Assigned tasks can be automatically counted as load against a resource's capacity, but it is recommended that the project staffing profile (if one exists) be configured to count as workload. This allows the work plan to be laid out and scheduled in phases without concern that resources will appear free when they are not yet assigned to specific tasks. Work plan task assignments will show up in HP Resource Management visualizations such as the two-week Resource Gantt chart pictured in *Figure 5-1* on page 124.

The Resource Finder can also be used to find the most appropriate resource to complete the task. The Resource Finder scores resources based on role and skill suitability and availability. See *Using the Resource Finder* on page 130 for more detailed information.

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 HP Resource Management behavior:

● 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.

To assign multiple resources to a task:

1. Open the work plan.

2. Double-click the task to which you want to assign a role.

   The Task Detail page opens.

3. Click the **Resources** tab.

4. Click **Add Resource** to select a new resource to add to the task.

   Repeat as necessary.

5. Click **Save.**

The values for each individual resource's scheduled effort can be altered in the Task Detail page.

To change the scheduled effort for multiple resources assigned to a task:

1. Open the work plan.

2. Double-click the task to which you want to assign a role.

   The Task Detail page opens.

3. Click the **Resources** tab.

4. Click **Change to Manual Control.**

5. For each resource, type a value in the **Scheduled Effort** numeric field.

The **Total Effort (hours)** and **Unassigned Effort** fields update themselves automatically. If **Total Effort** is altered directly, the partial effort of each resource is adjusted proportionately.

6. Click **Save.**

Comparing Project Capacity to Work Plan Load

The Compare to Work Plan for Project page can be used to compare the forecasts made by the project staffing profile to the task assignments made on the work plan. If the rolled-up scheduled effort from the work plan does not align with the high-level assignments made in the staffing profile, this could be an indication of unbalanced utilization of the resources committed to the project. This is the same page used to compare the actual effort from the work plan with the assigned capacity in the staffing profile.

Compare to Work Plan for Project

The Compare to Work Plan for Project page displays a data table for a staffing profile that can be broken down by role or resource.

Figure 5-3. Compare to Work Plan for Project page

The table shows a different set of details depending on which is chosen, listed in *Table 5-2*.

Table 5-2. Details available in Compare to Work Plan for Project page

Table breakdown by	Available details
Role	Demand Forecast Assigned Scheduled Effort Actual Effort
Resource	Assigned Scheduled Effort Actual Effort

Open the Compare to Work Plan for Project page by clicking **Compare to Work Plan** in the Staffing Profile page. The data in the Compare to Work Plan for Project page can also be exported to a Microsoft Excel file for use in presentations or for further analysis. To export the Compare to Work Plan for Project page to a Microsoft Excel file, click the **Export to Excel** link.

If you are having problems with the data in Excel, you may need to configure the Internet options of your Web browser. See the *HP Project Management User's Guide* for more information.

Work Plan Resource Usage View

The Resource Usage page for work plans allows you to view the load placed on each resource by the work plan, broken down by task by day.

Open the Resource Usage page by clicking **Actions** at the top of the Work Plan page and selecting **Resource Usage.** For more details on the Resource Usage page, see the *HP Project Management User's Guide.*

Using the Resource Finder

HP Resource Management's Resource Finder allows you to locate and compare resources for assignment to the following entities:

- Tasks

- Requests

- Staffing profile positions

The **Resource Finder** icon, 🔍, is typically the second icon associated with the **Resource** field on a task, request, or staffing profile line.

You can also open the Resource Finder for a generic resource availability search by selecting **Resources > Search Availability** from the menu bar in the standard interface.

The Resource Finder may display some results in grey. These are resources that belong to a resource pool you do not manage. These resources can be viewed in the Resource Finder, but not assigned.

The Resource Finder's main fields are described in *Table 5-3*. Its header fields vary depending on whether a search is being run for a task, request, staffing profile, or generically.

Figure 5-4. Resource Finder

Table 5-3. Resource Finder fields and buttons (page 1 of 2)

Field/Button Name	Definition
Resource Results	
[checkbox]	Selecting this option keeps the selected resource at the top of the Resource Finder when paging through or revising the search.
Resource Name	The name of the resource. Sortable column.
Suitability Score	A numeric score representing the resource's suitability for the entity in question, based on their related role, skills, and availability. The higher this score, the better. See *Adjusting Resource Finder Calculations* on page 136 for more detailed information on how this score is computed.
Availability Score	A numeric score representing the resource's availability for the entity in question, based on their current load and capacity. The higher this score, the better.
Skill Score	A numeric score representing the resource's suitability for the entity in question relative to the skill required.
Projected Utilization	How much the resource would be used if the assignment were made.
Check All	Selects the checkboxes next to all resources listed.
View Resource Load	Opens the Resource Load page with data for all selected resources.
Compare Skills	Opens the Compare Skills page with data for all selected resources.
Prev/Next	Moves on to the next or previous set of search results, with the selected resources (if any) retained at the top of the list.
Assign	Enabled when one or more resources are selected. Assigns the selected resource(s) to the entity in question and closes the Resource Finder.
Cancel	Closes the Resource Finder without making changes.

Table 5-3. Resource Finder fields and buttons (page 2 of 2)

Field/Button Name	Definition
Modify Search Criteria	
Availability Within Dates	Searches for resources available within the selected dates.
Effort	The amount of effort in hours or FTEs required within the available dates. This field only appears on the Resource Finder for tasks and requests.
Delete icon	Removes the skill from the filter list.
Skill	Searches for resources with the selected skill.
Ideal Proficiency	Searches for resources near the selected Proficiency Level.
Add Skill	Adds another skill line to the filter list.
Only show results with a Suitability Score greater than	Searches for resources with a Suitability Score greater than the entered value.
Resource Name	Only displays the selected resources.
Resource Category	Only displays resources in the selected category.
Role	Only displays resources with the selected role.
Location	Only displays resources in the selected location.
Resource Pool	Only displays resources in the selected resource pool.
Department	Only displays resources in the selected department.
Organization Unit	Only displays resources in the selected organization unit.
Search	Reloads the Resource Finder with search results based on the new criteria.

Searching for a Resource

To use the Resource Finder to search for a resource to assign to a task, request or staffing profile:

1. Provide a **Role** for the desired entity.

2. Click the **Resource Finder** icon next to the **Resource** field.

   The Resource Finder opens, displaying a set of resources with the desired role.

3. Select the checkboxes next to any of the resources displayed to retain them in case you want to page to the next set of results or refine the search.

   If you select some resources and click **Search Again** in the **Modify Search Criteria** tab, the Resource Finder reloads with the selected resources collected at the top of the list for easy comparison.

4. If needed, refine the Resource Finder's search by entering filter criteria into the fields in the **Modify Search Criteria** tab and clicking **Search Again.**

   The filter fields in the **Modify Search Criteria** tab vary depending on whether you are looking at a task, request, or staffing profile line.

5. If desired, drill down into the selected resources' load and skill profiles by clicking **View Resource Load** or **Compare Skills.**

   See *Viewing Resource Load* or *Comparing Skills* for more detailed information.

6. Click **Assign** once you have selected the resources you wish to assign.

   The Resource Finder closes and the **Resource** field on the current entity is automatically filled in with the selected resources.

Viewing Resource Load

The Resource Finder allows you to view a breakdown table of selected resource load similar to the table accessed from the Analyze Assignment Load page. This table includes scheduled effort values for all assigned tasks and requests, resource allocations for staffing profiles, and the available capacity for each resource.

Figure 5-5. Resource Finder Resource Load Breakdown table

To access this table:

1. Click **View Resource Load** in the Resource Finder window.

   The Resource Load Breakdown page opens.

2. Click any of the **Highlight** links to highlight over-allocations, availability, both, or neither.

3. Click **Done** to return to the Resource Finder.

Comparing Skills

The Resource Finder allows you to view a table comparing the skills of selected resources, including each resource's skill level.

Figure 5-6. Resource Finder Compare Resource Skills page

To access this table:

1. Click **Compare Skills** in the Resource Finder window.

   The Compare Resource Skills page opens.

2. Click **Done** to return to the Resource Finder.

Adjusting Resource Finder Calculations

The Resource Finder computes its Suitability Score using the following values:

- Skill Score
- Role Score
- Availability Score

These scores are weighted according to the following formulae to produce the final Suitability Score:

Availability Weight = 100 – Skill Weight – Role Weight

Suitability Score = Skill Score * (Skill Weight%) + Role Score * (Role Weight%) + Availability Score * (Availability Weight%)

You can change the Skill Weight and Role weight by altering the appropriate parameters in the `server.conf` file on the PPM Server. *Table 5-4* describes the `server.conf` parameters that set the Skill Weight and Role Weight.

Table 5-4. server.conf parameters for skill weight and role weight

Parameter	Description	Default Value
RESOURCE_FINDER_ROLE_ WEIGHT	The weight given to the Role Score in Suitability Score calculations for the Resource Finder. Possible values: **0-100**	25
RESOURCE_FINDER_SKILL_ WEIGHT	The weight given to the Skill Score in Suitability Score calculations for the Resource Finder. Possible values: **0-100**	25

For example, given the default values for the Skill Weight and Role Weight and the following scores:

- Skill Score = 80

- Role Score = 100

- Availability Score = 60

The following calculation occurs:

Availability Weight = 100 – 25 – 25 = 50

Suitability Score = 80 (25%) + 100 (25%) + 60 (50%) = 75

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** − (Regional calendar non-working days)

> **Scheduled Effort** = **Scheduled Duration** * (Working hours in a day defined from regional calendar)

- Requests use the System Default Regional Calendar's setting for the number of working hours in a day.
- Tasks use the setting defined in the project's selected region, defined in the Project Settings window.
- Requests with resources assigned use the number of working hours in a day set by the resource's regional calendar.

Scheduled Value Field Relationships

The **Scheduled Duration** and **Scheduled Effort** for a request work item are automatically calculated in the following manner:

> **Scheduled Duration** = **Scheduled Finish Date** − **Scheduled Start Date** − Regional calendar non-working days)

> **Scheduled Effort** = **Scheduled Duration** * (Working hours in a day defined from regional 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.

➤ 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

Actual field values for work item requests 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** – (Regional 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.

> 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.

My Tasks Portlet

Task work items can be viewed and updated from the My Tasks portlet.

Resources with a Project Management or Time Management license can add the My Tasks portlet to one of their PPM 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.
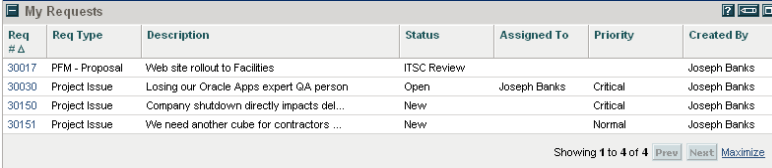
For example, the My Tasks portlet can be filtered to display only tasks beginning within the next two weeks that are ready for action whose Predecessors are more than 50% complete.

For more information on using the My Tasks portlet, see the *HP Project Management User's Guide.* For more information on using the My Tasks portlet in conjunction with HP Time Management, see the *HP Time Management User's Guide.*

My Requests Portlet

Request work items can be viewed and updated from the My Requests portlet.

Figure 5-7. My Requests portlet

Resources with a Demand Management license can add the My Requests portlet to one of their PPM 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 the View my personal resource information only access grant can select **Administration > View My Resource Information** from the menu bar.

Figure 5-8 shows the **Capacity/Load** tab of the View Resource page for a resource, including capacity graph and personalized Gantt chart.

Figure 5-8. View Resource page: Capacity/Load tab
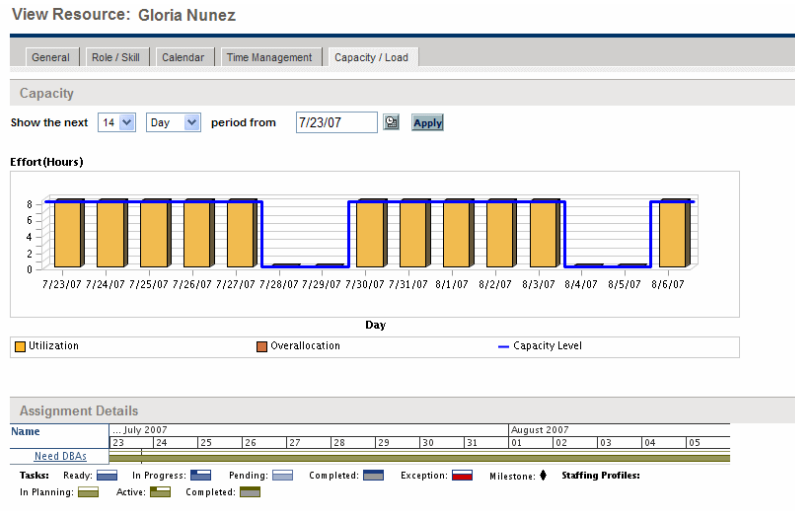
Of particular interest are the visualizations in the **Capacity/Load** tab:

● **Capacity.** Charts the resource's capacity against their current assignments, and shows areas of over-allocation. Non-Workload assignments are omitted.

● **Assignment Details.** A Gantt chart that displays all of the resource's assignments, as well as showing task exceptions.

The time scale of both of these visualizations can be altered to view a wide range of time periods. They are also available as portlets.

The Analyze Assignment Load portlet pictured in *Figure 5-11* on page 144 can be personalized to display only allocations for one resource. For more detailed information on the Analyze Assignment Load visualization, see *Visualizing Assignments*.

The Resource Gantt portlet can be personalized to display only allocations for one resource (*Figure 5-9*) and can display both task and staffing profile allocations.

Figure 5-9. Resource Gantt portlet, one resource
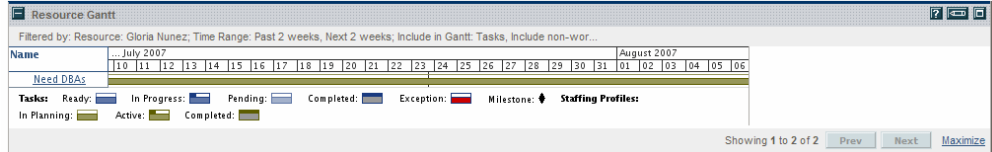
Figure 5-10. Resource Gantt portlet, non-workload tasks
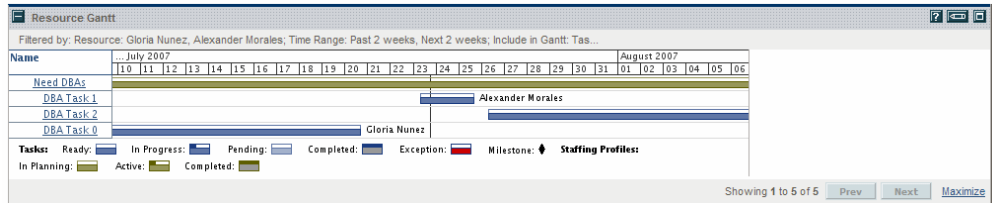
Visualizing Assignments

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 portlet 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 5-11 shows the Analyze Assignment Load portlet, which can help a manager rapidly pinpoint areas of over- or under-allocation.

Figure 5-11. Analyze Assignment Load portlet
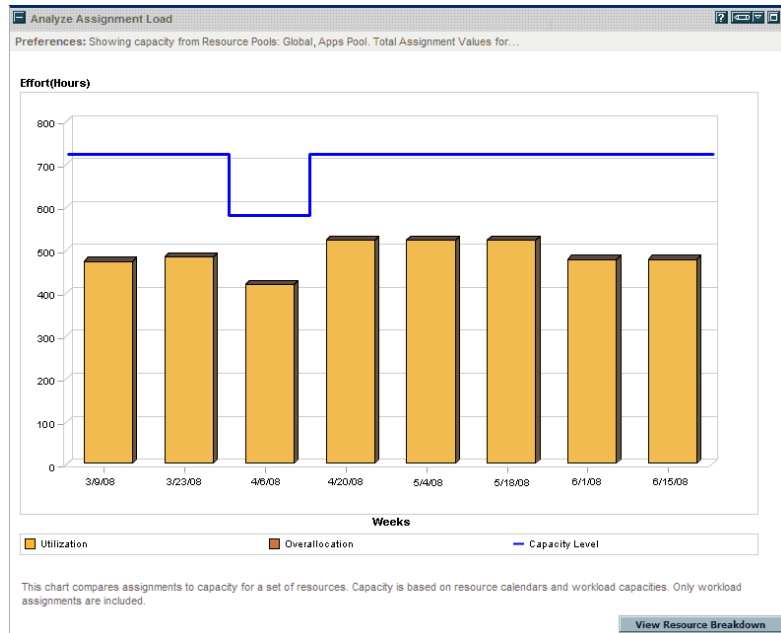
The Analyze Assignment Load portlet can be filtered according to the parameters described in *Table 5-5*.

Table 5-5. Analyze Assignment Load portlet - parameters

Field Name	Description
Preferences	
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, Resource Pool, Resources Managed By, Resource Name, Resources on Project**
Assignments with Workload Category	Selects assignments of a specific **Workload Category** to display.
Resources with Role	A multi-select auto-complete field that selects a role or set of roles to display from the sets of resources being analyzed.
Total Assignment Values for	Sets whether to display **Scheduled Effort, Actual Effort,** or **Scheduled and Actual Effort** in the Analyze Assignment Load page.
Time Period	
Period	Sets the time period being used by the Analyze Assignment Load page.
Display __ 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 __ future periods	Selects up to 20 time periods after the current date to include in the Analyze Assignment Load page.

To get a detailed breakdown of total resource capacity and workload, click
View Resource Breakdown. The Resource Breakdown table, pictured in
Figure 5-12, opens in a new dialog box.

Figure 5-12. Resource Breakdown table

The Resource Breakdown table itself can be filtered to show different data
according to the parameters described in *Table 5-6*.

Table 5-6. Resource Breakdown table - parameters

Field Name	Description
View Table by	Chooses the data to display in the table. **Assignments (hours)** — Shows each resource's assignment total in working hours. **Assignments (hours) - Details** — Shows the work items that contribute to the resource's assignment totals.
Highlight	Chooses whether to highlight **Overallocation** (red numbers) or **Availability** (green numbers) in the table.

With the visualizations available from the Analyze Assignment Load portlet, 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.

➤ 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

Adjusting Resource Calendars

Individual resource calendars can be modified by a resource or the resource's manager, depending on their levels of access. Modifying an individual's resource calendar can help create more accurate visualizations of that resource's capacity and workload. For more detailed information on modifying resource calendars, see *Setting Up the Resource Calendar* on page 41.

Index

C

calendars
    regional setup, **23**
    regional system default, **24**
    setting up for resources, **41**

capacity planning
    assigning resources, **89**
    collecting resource requests, **89**
    forwarding demand, **92**
    making assignments, **90**
    rejecting demand, **92**
    Resource Management, **57**
    resource pools, **59**

changing
    notifications for resource pools, **31**
    notifications for staffing profiles, **31**
    resource pools in resource allocation
        management, **119**
    status in resource allocation management,
        116

Configure Access page
    access grants, **69**
    resource pools, **70**
    staffing profiles, **86**

configuring
    access to resource pools, **70**
    notification parameters, **33**

creating
    organization model, **35**
    organization units, **47**
    resource pools, **61**
    roles, **17**
    skills, **20**
    staffing profile for a project, **97**
    staffing profiles, **76**

D

default time period views, **15**

deleting
    resources from resource allocation
        management, **115**
    roles, **19**
    skills, **22**

disabling
    notifications for resources, **65**

display options
    Resource Allocation Management page,
        110

E

EMAIL_NOTIFICATION_SENDER
    parameter, **33**
ENABLE_RM_NOTIFICATION_SERVICE
    parameter, **33**

F

filtering
    Resource Allocation Management page,
        106

filters in Resource Allocation Management
    page
    advanced, **107**
    quick, **106**
    time period, **109**

forecasted demand
    exporting to Microsoft Excel files, **65**

forwarding
    resource requests in resource allocation
        management, **114**

forwarding demand, **92**