

HP Project and Portfolio Management Center

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HP Resource Management User's Guide

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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
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Why version number 9.10?

PPM Center is an integrated part of the HP BTO Operations version 9 portfolio. Using this version number aligns PPM Center with other products that are releasing in the same time frame. PPM Center 9.10 builds on PPM Center 8.0x and is an extension of that product version family. Product releases within the HP BTO Operations version 9 portfolio will feature shared technology, common platforms, integrations, solutions, upgrade tools, and professional services offerings.

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- 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

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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

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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 13](#) 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 55](#) 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 147 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*
- *Operational Reporting User's 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:

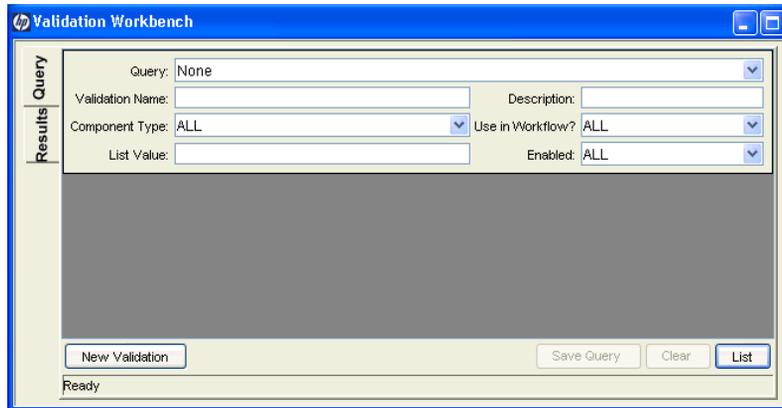
 If the validation's definition language differs from your session language, you cannot modify the validation. You can only modify a validation in its definition language. Select **File > Language Options** and see the *Multilingual User Interface Guide* for more information.

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.

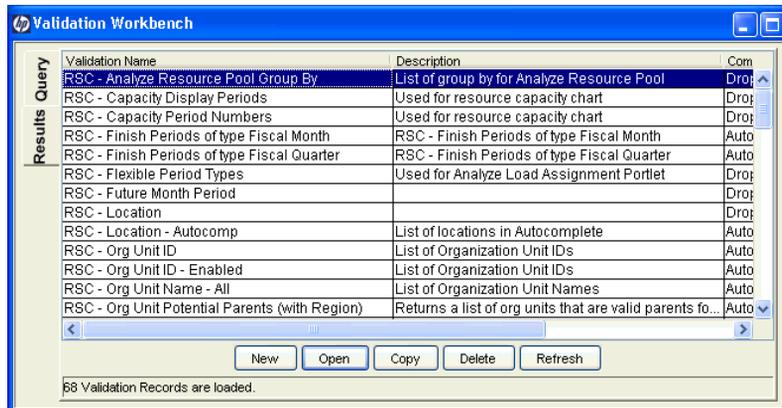
- From the shortcut bar, select **Configuration > Validations**.

The Validation Workbench window opens.



- Type **rsc** into the **Validation Name** field and click **List**.

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



- Modify the validations listed in *Table 2-1* on page 14 to conform to your business model.
- 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
 - Years
 - Quarters
 - Months
 - Weeks
- Totals per resource
 - Hours
 - Full time equivalents (FTEs)
 - 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 *Installation and Administration Guide*.

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 **Create > Administrative > 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
Role 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 (VMN)	System Administrator (VMN)	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.



The definition language of the role is set to your session language. The role can only be modified in its definition language. See the *Multilingual User Interface Guide* for more information.

Modifying Existing Roles



If the role's definition language differs from your session language, you cannot modify the role. Click **Why?** in the header and see the *Multilingual User Interface Guide* for more information.

To modify an existing role:

1. Log on to PPM Center.
2. Select **Search > Administrative > Roles** from the menu bar.
3. From the Browse Roles page, 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 **Search > Administrative > Roles** from the menu bar.
3. From the Browse Roles page, 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. Therefore, a user cannot add to or modify his or her own skills unless that user has the Edit All Skills access grant.

Creating a New Skill

To add a new skill:

1. Log on to PPM Center.
2. Select **Create > Administrative > 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.



The definition language of the skill is set to your session language. The skill can only be modified in its definition language. See the [Multilingual User Interface Guide](#) for more information.

Modifying Existing Skills

To modify an existing skill:

1. Log on to PPM Center.
2. Select **Search > Administrative > Skills** from the menu bar. The Browse Skills page opens.
3. Click on a skill **Name** to open its Modify Skill page.



If the skill's definition language differs from your session language, you cannot modify the skill. Click **Why?** in the header and see the *Multilingual User Interface Guide* for more information.

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

Deleting Skills

To delete a skill:

1. Log on to PPM Center.
2. Select **Search > Administrative > Skills** from the menu bar.
3. From the Browse Skills page, 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 **Search > Administrative > Regional Calendars** from the menu bar.

The Manage Regional Calendars page opens.

Manage Regional Calendars

 @ [Export to Excel](#)

Select Calendar to Modify Showing 1 to 11 of 11 [Prev](#) [Next](#)

Name	Enabled
US (System Default)	Yes
UK	Yes
France	Yes
Germany	Yes
Italy	Yes
Spain	Yes
Canada	Yes
Brazil	Yes
Australia	Yes
Singapore	Yes
Israel	Yes

Showing 1 to 11 of 11 [Prev](#) [Next](#)

[Create New Regional Calendar](#) [Set System Default Regional Calendar](#)

Filter Regional Calendars

Name:

Enabled:

Used by Resource: 

Used by Org Unit: 

Used by Project: 

Used by Region: 

Sort By: Ascending Descending Results Displayed Per Page:

[Search](#)

You can expand or narrow down the list of regional calendars by providing 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.

Modify Regional Calendar: Australia

Save Done Cancel

February 2007 Jump to: 2006 2008 Today

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	1	2	3

Set selected days to:

Working Day Reason: Description: Apply

Non-Working Day

Revert to default from setting

Hours per day: 8.0 Change Settings

This calendar is not in use. Enabled Note: Disabling this calendar will not affect Resources, Organization Units or Projects that are currently using it. However, it will no longer be available for addition to new or existing items. Copy Calendar

Disabled for future use

Delete

Save Done Cancel

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 **Open > 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.

Set System Default Regional Calendar

The System will use the Regional Calendar selected below unless a different Regional Calendar is specified.

Select a Regional Calendar to use as the System Default	
Regional Calendar	Calendar Settings
<input checked="" type="radio"/> US	8 hours/day, Monday - Friday, US Holidays Holidays
<input type="radio"/> UK	8 hours/day, Monday - Friday, UK Holidays Holidays
<input type="radio"/> France	8 hours/day, Monday - Friday, France Holidays Holidays
<input type="radio"/> Germany	8 hours/day, Monday - Friday, Germany Holidays Holidays
<input type="radio"/> Italy	8 hours/day, Monday - Friday, Italy Holidays Holidays
<input type="radio"/> Spain	8 hours/day, Monday - Friday, Spain Holidays Holidays
<input type="radio"/> Canada	8 hours/day, Monday - Friday, Canada Holidays Holidays
<input type="radio"/> Brazil	8 hours/day, Monday - Friday, Brazil Holidays Holidays
<input type="radio"/> Australia	8 hours/day, Monday - Friday, Australia Holidays Holidays
<input type="radio"/> Singapore	8 hours/day, Monday - Friday, Singapore Holidays Holidays
<input type="radio"/> Israel	8 hours/day, Sunday - Thursday, Israel Holidays Holidays

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

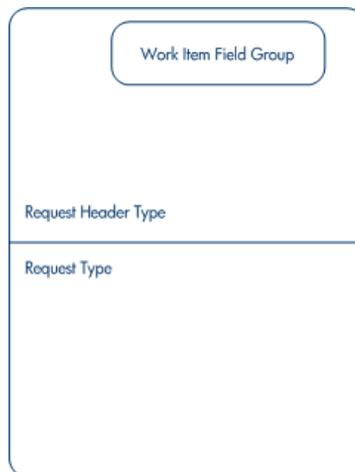
If you have licenses for HP Demand Management, and you wish to include requests as work items to be tracked using HP Resource Management, associate work item fields with your request types. Work item fields include the following (for a list of all request work item fields, see [Table 5-1 on page 148](#)):

- 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 *Installation and Administration Guide*. Contact your system administrator for help with this procedure.

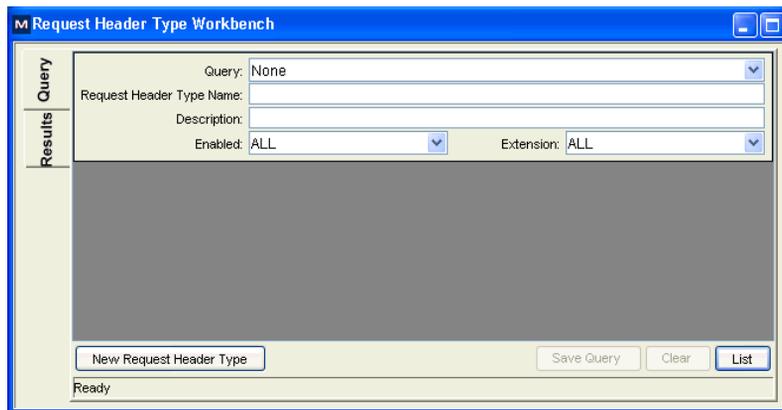
To associate work item fields with a request type:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.

The PPM Workbench opens.

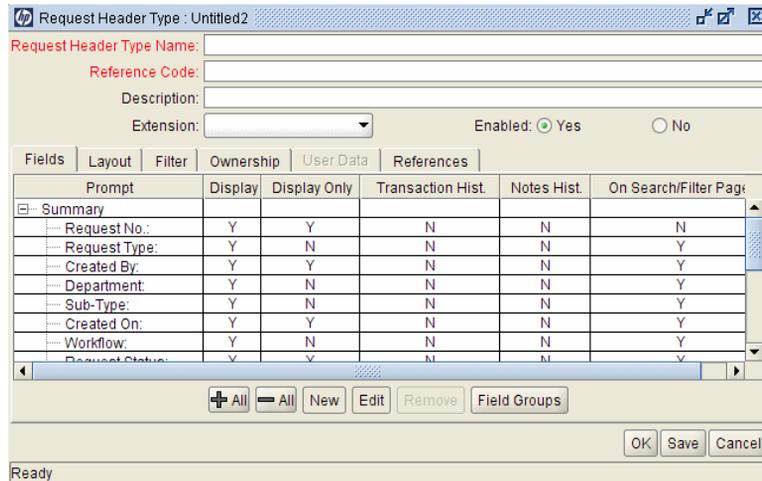
3. From the shortcut bar, select **Demand Mgmt > Request Header Types**.

The Request Header Type Workbench opens.



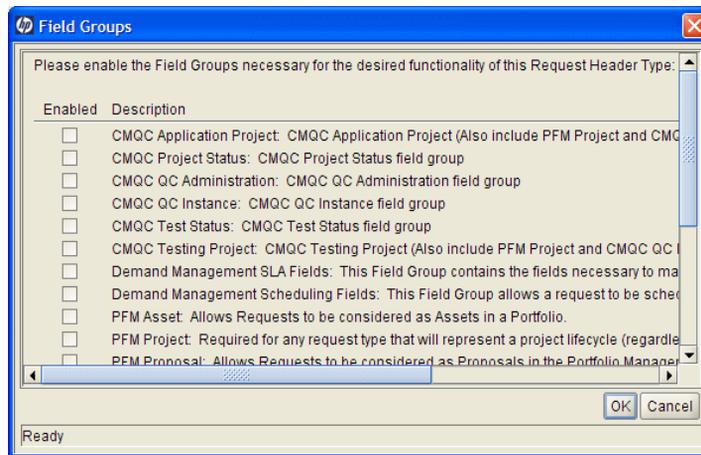
4. Click **New Request Header Type**.

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



5. Click **Field Groups**.

The Field Groups window opens.

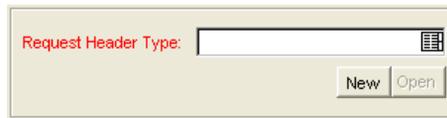


Depending on the PPM Center products your site has licensed, the Field Groups window may display a different set of options.

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. Provide 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.



The screenshot shows a web form with a label 'Request Header Type:' in red text. To the right of the label is an empty text input field with a small grid icon on its right side. Below the input field are two buttons: 'New' and 'Open'.

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 55.

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 57.

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` and set up the notification service to successfully send email notifications. See [Setting Notification Parameters](#) on page 32 and [Setting Up the Notification Service](#) 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 84](#) 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 soft-booked 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 63](#) 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 64](#) 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 **Open > 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 *Installation and Administration Guide*). 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
<code>EMAIL_NOTIFICATION_SENDER</code>	Email address of the default sender of email notifications.	
<code>SMTP_SERVER</code>	Host name of the SMTP-compliant mail server that acts as the gateway for email notifications.	

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

Setting Up the Notification Service

The notification service for resource pools and staffing profiles is governed by the RM Notification Service on the PPM Server. *Table 2-4* describes this service.

Table 2-4. Notification service for resource pools and staffing profiles

Service	Description	Default Values
RM Notification Service	Determines if notifications are sent and how often they are sent. If Schedule is set to 1 minute, notifications are sent immediately. If Schedule is set to an interval greater than 1 minute, notifications sent to the same recipient during that interval are grouped into a single email.	Status: Disabled Schedule Type: Simple Schedule: 1 hour

To modify the service, do the following:

1. From the menu bar in the standard interface, select **Open > Administration > Schedule Services**.
2. Click on the **RM Notification Service**.
3. Edit the Status, Schedule Type, and Schedule. See the online help for more information about the Schedule Type.
4. Click **Save**.

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

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 55). Roles can be user responsibilities that help to describe resource requirements. See Setting Up Roles on page 18 for more detailed information.
Skills	Used to further describe resource requirements for tasks and staffing profile positions beyond the role description such as an ability or area of knowledge. See Setting Up Skills on page 21 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 <i>HP Financial Management User's Guide</i> .

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 **Search > Administrative > Resources** from the menu bar.

The Search Resources page opens.

Search Resources

Search for Resources to View

Username contains:	<input type="text"/>	Role:	<input type="text"/>
First Name contains:	<input type="text"/>	Last Name contains:	<input type="text"/>
Department:	<input type="text"/>	Skill:	<input type="text"/>
Manager:	<input type="text"/>	Region:	<input type="text"/>
Org Unit:	<input type="text"/>	Location:	<input type="text"/>
Security Group:	<input type="text"/>	Category:	<input type="text"/>
Enabled:	<input type="text" value="Yes"/>	Time Sheet Policy:	<input type="text"/>
Time Approver:	<input type="text" value="Resource"/>	Title:	<input type="text"/>
Billing Approver:	<input type="text" value="Resource"/>	Resource Pool:	<input type="text"/>
Cost Category:	<input type="text"/>		

Sort By: Ascending Descending *Results Displayed Per Page:

Search

- Specify any search criteria in the Search for Resources section and click **Search**.

The Search Resources page displays the results of your search.

Search Resources

 [Export to Excel](#)

Select Resource to View Showing 1 to 7 of 7 [Prev](#) [Next](#)

Username 	First Name	Last Name	Role	Department
<input type="checkbox"/> bsolomon	Bruce	Solomon		
<input type="checkbox"/> bucason	Benjamin U.	Cason	Database Administrator	
<input type="checkbox"/> djones	David	Jones	Application Developer	
<input type="checkbox"/> dmorrison	Dennis	Morrison	Business Analyst	
<input type="checkbox"/> ganderson	Gina	Anderson		
<input type="checkbox"/> pmanon	Pramod	Manon		
<input type="checkbox"/> pmoon	Penelope	Moon		
<input type="checkbox"/> Check all				

[Modify Checked Resources](#) [Modify All Returned Resources](#) Showing 1 to 7 of 7 [Prev](#) [Next](#)

Search for Resources to View

Username contains: Role: 
 First Name contains: Last Name contains:
 Department:  Skill: 
 Manager:  Region: 
 Org Unit:  Location: 
 Security Group:  Category: 
 Enabled: Yes  Time Sheet Policy: 
 Time Approver:   Title: 
 Billing Approver:  
 Cost Category: 

Sort By:  Ascending Descending Results Displayed Per Page: 50

[Search](#)

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

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

Modify Resource: Carolyn Sayer

Save Done Cancel

General Role / Skill Calendar Time Management Capacity / Load

General Resource Settings

Full Name: Carolyn Sayer **Start Date:** 1/1/05 **End Date:**

First Name: Carolyn **Title:**

Last Name: Sayer **Department:**

Email: csayer@acme.com **Location:**

Phone Number: **Category:**

Direct Manager: Ron Steel **Cost Category:**

Resource will:

Inherit Region: MercuryUS, from Org Unit: Corporate IT

Use this Region: View

Organization Information		
Org Unit Name	Type	Manager
Corporate IT	Department	Ron Steel

Non-Matrixed Organization Units are shown in Bold.

Resource Pool Participation	
Resource Pool	Current Participation (eff.)
Non-Work Load Capacity	100%
Total	100%

Manage Participation

Related Actions

Modify User Information for this Resource (Workbench)

View Organization Model

Save Done Cancel

5. Provide data for any desired resource attributes.

When the financial summary settings are set to calculate forecasted labor costs from the staffing profile, the cost category is used to categorize costs of work allocations.

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 **Search > Administrative > Resources** from the menu bar.

The Search Resources page opens.

3. Specify any search criteria in the Search for Resources section and click **Search**.

The Search Resources 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 Checked Resources**.

The Resource Mass Update page opens.

Resource Mass Update Save Done Cancel

2 out of 4 total returned resources are selected and the new values will be applied to them.

Org Unit: Time Approver: Resource

Region: Billing Approver: Resource

Location: Time Sheet Policy:

Category: Manager:

Role: Cost Category: Level 1 (Low) Add Remove

Skill:

Save Done Cancel

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.
Promise Unspecified Resources	The user can add, assign, modify and remove promised allocations. The ENABLE_PROMISE_RESOURCE_ALLOCATION parameter must be enabled to view promised allocations.

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 3-1 illustrates a sample organization model.

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

Figure 3-1. Sample organization model



The screenshot shows the 'View Organization Model' page with a table of organization units. The table has columns for Organization Unit Name, Type, Manager, Department, Location, Enabled, and Members Total (Direct). The data is as follows:

Organization Unit Name	Type	Manager	Department	Location	Enabled	Members Total (Direct)
ACME Corporation				San Francisco	Yes	34 (0)
Commercial Banking	Department		Commercial Banking	London	Yes	1 (0)
Corporate Finance	Department		Corporate Finance	San Francisco	Yes	0 (0)
Corporate HR	Department		Corporate HR	San Francisco	Yes	0 (0)
Corporate IT	Department	rsteel	Corporate IT	San Francisco	Yes	33 (7)
Corporate Marketing	Department		Corporate Marketing	San Francisco	Yes	0 (0)
Retail Banking	Department		Retail Banking	San Francisco	Yes	0 (0)

The **Expand All** and **Collapse All** buttons, used to view and hide all organization units on this page, are not enabled. If your organization is large, selecting these buttons causes slow performance. If you want to enable these buttons, set the `RM_ENABLE_ORG_VIEW_EXPAND_ALL` `server.conf` parameter to true. For more information, see *Installation and Administration Guide*.

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 57 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 53](#) 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.

You can show the assignment load for all resources in an organization unit with the Analyze Assignment Load portlet. [Figure 3-2](#) 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 3-2. Analyze Assignment Load portlet



Creating an Organization Unit

To create an organization unit:

1. Log on to PPM Center.
2. Select **Create > Administrative > Org Unit** from the menu bar.

The Create a New Organization Unit page opens.

Create a New Organization Unit

Name:

Department:

Type:

Manager: 

Location:

This Organization Unit is a:

Primary Organization Unit

Matrix Organization Unit

Parent Org Unit: 

Inherit Region from Parent

Use this Region:  

Enabled: Yes No

Direct Members		
Username	Full Name	Primary Org Unit
There are currently no Direct Members.		

No Results  

Add New Organization Members:

Resource:  

Linked Security Groups	
Name	Relationship
There are currently no linked Security Groups. Security Groups are attached in the Workbench.	

Child Organization Units		
Name	Type	Enabled
There are currently no child Organization Units.		

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**.

- 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.

Create a New Organization Unit

Name:

Department:

Type:

Manager:

Location:

This Organization Unit is a:

Primary Organization Unit

Matrix Organization Unit

Parent Org Unit:

Inherit Region from Parent

Use this Region:

Enabled: Yes No

Direct Members		
Username	Full Name	Primary Org Unit
<input type="checkbox"/> grunez	Gloria Nunez	Unspecified
<input type="checkbox"/> bucason	Benjamin U. Cason	Server & Desk...
<input type="checkbox"/> bsolomon	Bruce Solomon	Corporate IT
<input type="checkbox"/> jswain	Jason Swain	Applications

Showing 1 - 4 of 4

[Check All](#) [Clear All](#) [Remove](#)

Add New Organization Members:

Resource: [Add](#)

[Create](#) [Cancel](#)

5. Click **Create** to create the organization unit.

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

View Organization Unit: QA (Primary Organization Unit)

[Modify Org Unit](#) [Done](#)

Name: QA	Parent Org Unit: Applications
Department:	Inheriting Region: MercuryUS
Type: Team	Regional Calendar: US
Manager: Solomon, Bruce	Currency: United States Dollar
Location:	Enabled: Yes
Financial Summary: QA	Note: This is a Primary Organization Unit.

<table border="1"> <thead> <tr> <th colspan="3">Direct Members</th> </tr> <tr> <th>Username</th> <th>Full Name</th> <th>Primary Org Unit</th> </tr> </thead> <tbody> <tr> <td>molive</td> <td>Marjole Olive</td> <td>QA</td> </tr> <tr> <td>ngiddings</td> <td>Nancy Giddings</td> <td>QA</td> </tr> <tr> <td>tbeach</td> <td>Tony Beach</td> <td>QA</td> </tr> </tbody> </table> <p style="text-align: center;">Showing 1 - 3 of 3 Prev Next</p>	Direct Members			Username	Full Name	Primary Org Unit	molive	Marjole Olive	QA	ngiddings	Nancy Giddings	QA	tbeach	Tony Beach	QA	<table border="1"> <thead> <tr> <th colspan="2">Linked Security Groups</th> </tr> <tr> <th>Name</th> <th>Relationship</th> </tr> </thead> <tbody> <tr> <td colspan="2">There are currently no linked Security Groups. Security Groups are attached in the Workbench.</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="3">Child Organization Units</th> </tr> <tr> <th>Name</th> <th>Type</th> <th>Enabled</th> </tr> </thead> <tbody> <tr> <td colspan="3">There are currently no child Organization Units.</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Related Actions</th> </tr> </thead> <tbody> <tr> <td>View Staffing Profiles for this Organization Unit</td> </tr> </tbody> </table>	Linked Security Groups		Name	Relationship	There are currently no linked Security Groups. Security Groups are attached in the Workbench.		Child Organization Units			Name	Type	Enabled	There are currently no child Organization Units.			Related Actions	View Staffing Profiles for this Organization Unit
Direct Members																																	
Username	Full Name	Primary Org Unit																															
molive	Marjole Olive	QA																															
ngiddings	Nancy Giddings	QA																															
tbeach	Tony Beach	QA																															
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Name	Type	Enabled																															
There are currently no child Organization Units.																																	
Related Actions																																	
View Staffing Profiles for this Organization Unit																																	

[Done](#)

Building the Organization Model

The organization model is a hierarchy of organization units. *Figure 3-3* illustrates the terms used by HP Resource Management when defining the organization model.

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

<input checked="" type="checkbox"/> Retail Banking	Department
<input type="checkbox"/> Retail Banking IT	Team
<input type="checkbox"/> Retail Banking Marketing	Group

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 3-4. 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 3-5. Create a New Child Org Unit button

Name	Type	Enabled
There are currently no child Organization Units.		

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

1. Log on to PPM Center.
2. Selecting **Search > Administrative > Org Units** from the menu bar.

The Modify Organization Units page opens.

3. Provide 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 3-6. Security group membership determined by organization unit

The screenshot displays the 'Security Group : PPM Resource Manager' configuration window. Key elements include:

- Name:** PPM Resource Manager
- Reference Code:** PPM_RESOURCE_MANAGER
- Description:** Provides access to resource workload and capacity planning data
- Membership Section:** The 'Determined by Organization Unit' radio button is selected. Below it, the 'Direct Members Only' radio button is also selected. An 'Organization Unit' field is present with a 'View' button.
- Users Table:** A table with one entry: 'Admin User'.
- Buttons:** 'New' and 'Delete' buttons are located below the users table. 'OK', 'Save', and 'Cancel' buttons are at the bottom right.
- Status:** 'Filtered to 1 of 1 total user(s)' is shown at the bottom left.

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 and the manager of the organization unit 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.

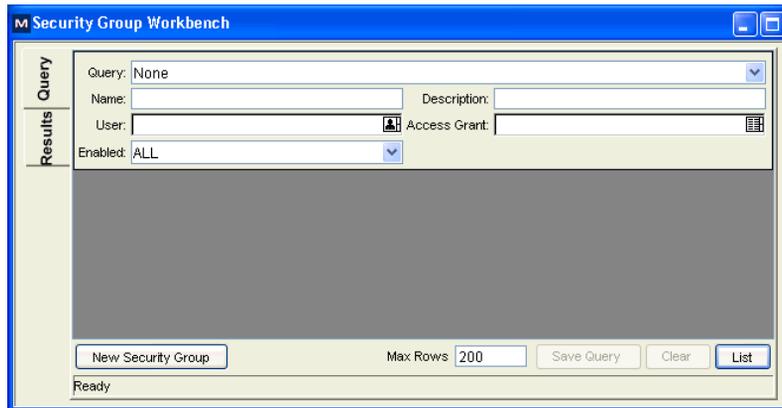
To link a security group to an organization unit:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench.**

The PPM Workbench opens.

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

The Security Group Workbench opens.



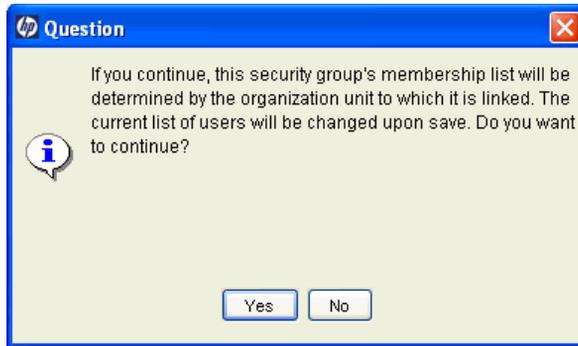
4. Create a new security group or search for and open an existing one.

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 belong to the “Unspecified” organization unit.
 - If they were set to inherit their region from their organization unit, they inherit the region belonging to the “Unspecified” organization unit.
 - If there was a resource pool associated with the organization unit, it is no longer linked.
- **Matrix to Primary.** All of the resources in the organization unit are 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 instead inherit their region from the current organization unit.

When you attempt to make this conversion, HP Resource Management presents 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 **Search > Administrative > Org Units** from the menu bar.
3. Click the name of the organization unit you wish to convert.

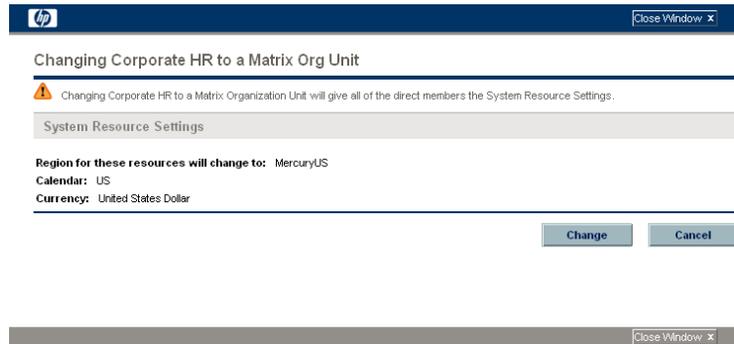
The View Organization Unit page opens.

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**.

Deleting an Organization Unit

Deleting an organization does not remove resources, security groups, child organization units, or other entities associated with it. You must have either the Resource Mgmt: Edit Entire Organization or Resource Mgmt: Edit Only Organization Units that I Manage access grant to delete an organization unit.

To remove an organization unit:

1. Log on to PPM Center.
2. Selecting **Search > Administrative > Org Units** from the menu bar.

The Modify Organization Units page opens.

3. Select the checkbox next to the organization unit to delete.
4. Click **Delete**.

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 85 for details on resource requests.

Staffing Profile managers can manage positions and assignments for the projects he owns using the Forecast Planning page. See *Forecast Planning* on page 93 for details on the Forecast Planning page.

4. Resource managers fill resource 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 104, *Adjusting Resource Participation Within Resource Pools* on page 65, and *Assigning a Resource to a Resource Request from the Resource Allocation Management Page* on page 136 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 107, *Forwarding a Resource Request from the Resource Allocation Management Page* on page 138, and *Rejecting a Resource Request from the Resource Allocation Management Page* on page 139 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 116 and *Analyzing Resource Pools* on page 110 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	<ul style="list-style-type: none">• Resources• Roles• (both)
A resource pool can show capacity forecasts out to	<ul style="list-style-type: none">• 3 months• 6 months• 9 months• 1 year• 2 years• 3 years
Resource capacity can be grouped by	<ul style="list-style-type: none">• Week• Month• Quarter• Year
Resource capacity totals can be shown in	<ul style="list-style-type: none">• 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 123* for more information.

Creating a Resource Pool

To create a resource pool:

1. Log on to PPM Center.
2. Select **Create > Administrative > Resource Pool** from the menu bar.

The Create a New Resource Pool page opens.

Create a New Resource Pool

*Pool Name:

Description:

Pool Manager:

This Resource Pool is for:

Primary Organization Unit:

Freestanding

*Region:

Parent resource Pool:

Include children resource pools when calculating the resource load for this resource pool.

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

Show Pool for the: **Past** 3 Months **Next** 9 Months Show Resource Capacity in: Year | Quarters | Month | Weeks Show Totals in: Hours | FTE

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

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

Done

b. Click the links below the resource pool name.

- **Show Pool for the Past/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. Manage participation. See *Adjusting Resource Participation Within Resource Pools* on page 65 for more information.
- e. Repeat as necessary.
- f. 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

Resource Pool	Resource Pool is for	Pool Manager
Apps Pool		Bridget Holtbrook
Global		Admin User, Bridget Holtbrook
Long Term Contractors/Co...		Bridget Holtbrook
Offshore Partner A	Org Unit: Offshore Partner A	Pramod Manon
QA Engineers		Bridget Holtbrook

Showing 1 to 5 of 7 [Prev](#) [Next](#) [Maximize](#)

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 **Search > Administrative > Resource Pools**. The Search Resource Pools page opens.

Figure 4-2. Search Resource Pools page

Search Resource Pools

Search Resource Pools To View

Pool Name contains: Region:

Pool Manager: Primary Organization Unit:

Contains Resources: Include:

Sort By: Ascending Descending *Results Displayed Per Page:

Search

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.

Disabling and Enabling Resource Pools

A resource pool can be disabled, preventing it from being used. If a resource pool is not being used or is not actively managed, disabling it prevents it from being mistakenly assigned to or from a staffing profile.

When a resource pool is disabled, you may forward or reject any outstanding resource requests. If the selected resource pool is a default resource pool, you may replace or remove it. Existing capacity and current allocations remain active (they must be manually managed) and continue to be part of resource load and capacity calculations.

To disable a resource pool:

1. Open a resource pool.
2. Click **Additional Actions > Disable Resource Pool**.

3. Select to forward or reject all outstanding resource requests. If you forward all outstanding resource requests, select the resource pool to which to forward the requests.
4. If the resource pool is configured as a default resource pool for a staffing profile, project, or project type, additional fields display. You can select to replace the default resource pool with a new default resource pool or you can remove it from being the default resource pool (the staffing profile, project, or project type no longer has a default resource pool).
5. Click **Disable**. The Status field of the resource pool changes to **Disabled**.

To enable a resource pool:

1. Open a resource pool.
2. Click **Additional Actions > Enable Resource Pool**. The Status field of the resource pool changes to **Enabled**.

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 **Additional Actions > 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 Pool Data to Excel

To export the resource pool capacity, resource load, or forecasted demand data tables:

1. Open a resource pool.
2. Click **Manage Pool Capacity**, **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.

If your PPM Center instance supports multiple languages, the session language (selected at login) determines the language used in the Microsoft Excel file. Regional settings in your user profile determine the date, time, number, and currency format. Refer to the *Multilingual User Interface Guide* for more information.



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.

Manage Pool Capacity: Shared Developers Done

Show Pool for the: Show Resource Capacity in: Show Totals in:
 Past 3 Months 9 Months Year | Quarters | Month | Weeks | Hours | FTE

Resource	Role	02 '06		03 '06		
		Jun	Jul	Aug	Sep	Oct
<input type="radio"/> Brandi Greer	Database Administrator	1	0.85			
<input type="radio"/> Finn Gill	Database Administrator		1	0.35		
<input type="radio"/> Holly Haywood	Developer - Java/Web Technologies	1	0.45			
<input type="radio"/> Jason Swain	Database Administrator	1	0.85			
<input type="radio"/> John Groom	Developer - Interactive Design	1	0.85			
<input type="radio"/> Larry X. Veach	Developer - Java/Web Technologies	1	1	1	1	1
<input type="radio"/> Leslie Franklin	Developer - Interactive Design	1	0.85			
<input type="radio"/> Pamela Stewart	Developer - Database	1	0.85			
<input type="radio"/> Raymond Ackley	Developer - Java/Web Technologies	1	1	1	1	1
<input type="radio"/> Richard Gomez	Database Administrator	1	1	1	1	1
<input type="radio"/> Traci Shimizu	Network Administrator	1	0.85			
<input type="radio"/> William Klein	Developer - Interactive Design	1	0.85			
Month Total		11	10.4	3.35	3	3

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

Done

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	100
Apps Pool			
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
<input checked="" type="checkbox"/> Shared Developers	<input type="text"/>
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.

Viewing Forecasted Demand

To get a breakdown of total resource capacity viewed against load by staffing profile:

1. Open a resource pool.
2. In the Resource Pool page, click **View Forecasted Demand**. The Resource Supply Demand for dialog (or Analyze Resource Pool Breakdown table) opens.

See *Analyze Resource Pools Breakdown Table* on page 114 for more information.

Managing Allocation

To assess and manage resources and resource requests for a single resource pool:

1. Open a resource pool.
2. In the Resource Pool page, click **Manage Allocation**. The Resource Allocation Management page opens.



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

See *Managing Resource Allocation* on page 123 for more information.

Viewing Resource Load

To get a detailed breakdown of total resource capacity and workload:

1. Open a resource pool.
2. In the Resource Pool page, click **View Resource Load**. The Resource Load Breakdown dialog (or Resource Breakdown table) opens.

See *Resource Load Breakdown Table* on page 184 for more information.

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 or not 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** selection is enabled.

2. Click **Additional Actions > 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.

Configure Access for Resource Pool: Long Term Contractors/Consultants

The following users have access to view the Resource Pool for HP Project and Portfolio Management Center.
Provide additional editing access on an individual basis.

View Access			
Username	Edit Header	Edit Unnamed Headco	Edit Security
Bridget Holbrook	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Allen Zumwalt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Barbara Getty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Figure 4-4. Staffing Profile page

Staffing Profile: Consulting Project Done

[Configure Access](#) | [Configure Notifications](#) | [Change Header](#) | [Delete Staffing Profile](#)

This staffing profile is for Project - [Consulting Project](#) Status: In Planning

Description:

Created On: Aug 23, 2006 Created By: Barbara Getty

Work Load Category: Strategic Projects Region: MercuryUS

Profile Start: Nov 1, 2006 Profile Finish: Mar 31, 2007 Default Resource Pool:

Allocation Detail for Nov 1, 2006 to Mar 31, 2007 Enter Allocation in: [Year](#) | [Quarters](#) | [Month](#) | [Weeks](#) FTE | [Hours](#)

Position	Status	Resource Pool	Q4 '06		Q1 '07			Average FTE's Requested
			Nov	Dec	Jan	Feb	Mar	
Application Designer	New	Global	1.00	1.00	1.00	1.00	1.00	1.00
<input type="checkbox"/> Unmet Demand			1.00	1.00	1.00	1.00	1.00	1.00
Business Analyst	Requested	Offshore Partner A	2.00	2.00	2.00	2.00	2.00	2.00
user 1	Soft Booked	Offshore Partner A	0.10	0.10	0.10	0.10	0.10	0.10
<input type="checkbox"/> Unmet Demand			1.90	1.90	1.90	1.90	1.90	1.90
DBA	Soft Booked	Global	1.00	1.00	1.00	1.00	1.00	1.00
Dennis Morrison	Committed	Global						
Finn Gill	Committed	Global	1.00	0.50	1.00	1.00	1.00	0.90
Barbara Getty	Soft Booked	Global		0.50				0.10
Helpdesk Engineer	Requested	Global	1.00	1.00	1.00	1.00	1.00	1.00
<input type="checkbox"/> Unmet Demand			1.00	1.00	1.00	1.00	1.00	1.00
Period Total			5.00	5.00	5.00	5.00	5.00	5.00

Check all

Unmet Demand: [Assign](#) | [Reject](#) | [Forward](#)

Note: Because assigned resources may belong to a different region than the position's associated resource pool, unmet demand may be non-zero even if assigned FTEs match requested FTEs

[Export Staffing Profile](#)

Notes

[Add Notes](#)

Done

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 88 .
Configure Notifications	Select the type of notification a staffing profile manager receives. See Modifying Staffing Profile Notifications on page 84 .
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.
Delete Staffing Profile	Remove this staffing profile. You must have the Delete Staffing Profile access grant to delete a staffing profile. You must have the Delete Staffing Profile with Actuals access grant to delete a staffing profile that contains actuals. See Staffing Profile Security on page 86 for more information about staffing profile access grants.
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.

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

Item Name	Description
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.
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 specifying allocations in Full Time Equivalent (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 85 .
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 82 .
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 120 .
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.

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

Item Name	Description
[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.
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 106 for more information.
Resource Finder	Use the Resource Finder to search for a resource. See Making Assignments on page 106 for more information.
Reject	Reject a request for the selected unmet demand. See Rejecting and Forwarding Demand on page 107 for more information.
Forward	Forward a request to another resource pool. See Rejecting and Forwarding Demand on page 107 for more information.
Promise	Allocate a promised resource. See Assigning Promised Allocations on page 109 and Promised Allocations 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 85 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 104 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 providing 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.

- Select **Create > Staffing Profile** from the menu bar. The Create a Staffing Profile page opens.

Create a Staffing Profile

Name:

Description:

Manager:

Start Period: Status:

End Period: Region:

Work Load Category:

This staffing profile should show as work load: Yes No

Copy positions from existing staffing profile:

This is a Staffing Profile

Default Resource Pool:

- 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	<p>The status of the staffing profile.</p> <ul style="list-style-type: none"> • In Planning. The staffing profile is being developed. • Active. The staffing profile is available to execute. • Complete. The staffing profile has completed execution. • Cancelled. The staffing profile has been cancelled. • Lock Down. The staffing profile has been locked and is read-only (cannot be updated).

Field Name	Description
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.
Default Resource Pool	When adding a line to the staffing profile, the Resource Pool field will be automatically defaulted with this value.

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

4. Click **Create**.

The Staffing Profile page opens.

Staffing Profile: Project Actualization A Done

Configure Access Configure Notifications Change Header Delete Staffing Profile

This is freestanding staffing profile **Status:** In Planning

Description:

Created On: Feb 22, 2007 **Created By:** Admin User

Work Load Category: Strategic Projects **Region:** MercuryUS

Profile Start: Mar 1, 2007 **Profile Finish:** Jun 30, 2007 **Default Resource Pool:**

Allocation Detail for Mar 1, 2007 to Jun 30, 2007 Enter Allocation in: [Year](#) | [Quarters](#) | [Month](#) | [Weeks](#) FTE | [Hours](#)

Add A Position Send Resource Requests Import Positions Compare to Work Plan

Position	Status	Resource Pool	Q1 '07				Q2 '07				Average FTE's Requested
			Mar	Apr	May	Jun	Mar	Apr	May	Jun	
There are currently no positions forecasted on this profile.											
Period Total			0.00								

Note: Because assigned resources may belong to a different region than the position's associated resource pool, unmet demand may be non-zero even if assigned FTEs match requested FTEs

[Export Staffing Profile](#)

Notes

Add Notes

Done

5. In the Allocation Detail section, click on a time period next to **Enter Allocation in:** 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**, **Position Label**, and **Resource Pool** for the staffing profile line (required). Provide data for any optional fields such as the assignments needed for each time period.

Field	Description
Role Required	The role needed to fill the position.
Position Label	The name of the position.
Resource Type	The kind of resource needed.
Resource Pool	The resource pool from which to assign the role. Click Search to find a resource pool.
Specific Resources Requested	The name of a specific resource to fill the position. The resource request will include the name of the specified resource. However, the resource pool manager may choose to allocate other resources.

Field	Description
Response Needed By	The date when the position should be filled.
Assignments Needed	The amount of FTEs or hours needed to fill the position. 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.
Comments	Any notes you want to include about the position.

- c. Optionally, you can assign a skill to the position. Select the **Advanced** tab and click **Add a Skill**. Use the auto-complete to select the skill to assign.
- d. Optionally, set the cost category, and if SOP 98-1 tracking is enabled on the parent entity of the staffing profile, the expense type. When the financial summary settings are set to calculate forecasted labor costs from the staffing profile, the cost category is used to categorize costs of unmet demand and the expense type is used to categorize capital and operating expenses.

- 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

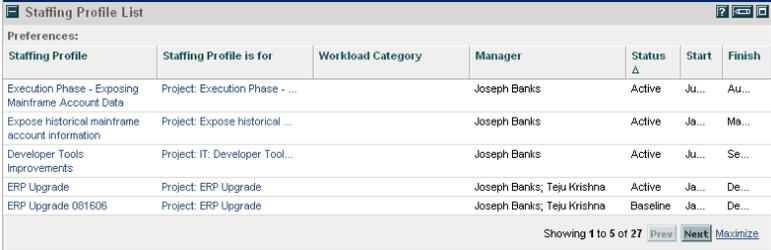
If you have created positions in a staffing profile that you want to use in a new or existing staffing profile, you can import these positions.

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



The screenshot shows a web portlet titled "Staffing Profile List". It contains a table with the following columns: Staffing Profile, Staffing Profile is for, Workload Category, Manager, Status, Start, and Finish. The table lists several profiles, including "Execution Phase - Exposing Mainframe Account Data", "Expose historical mainframe account information", "Developer Tools Improvements", "ERP Upgrade", and "ERP Upgrade 081606". The status of these profiles is "Active" or "Baseline". The portlet also includes a "Preferences:" section and navigation buttons at the bottom.

Staffing Profile	Staffing Profile is for	Workload Category	Manager	Status	Start	Finish
Execution Phase - Exposing Mainframe Account Data	Project: Execution Phase - ...		Joseph Banks	Active	Ju...	Au...
Expose historical mainframe account information	Project: Expose historical ...		Joseph Banks	Active	Ja...	Ma...
Developer Tools Improvements	Project: IT: Developer Tool...		Joseph Banks	Active	Ju...	Se...
ERP Upgrade	Project: ERP Upgrade		Joseph Banks; Teju Krishna	Active	Ja...	De...
ERP Upgrade 081606	Project: ERP Upgrade		Joseph Banks; Teju Krishna	Baseline	Ja...	De...

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 box or Search Staffing Profiles page.

Using the Search Box

The search box is used to locate and open staffing profiles based on staffing profile names that contain the specified text. Use the search box if you know the name of the staffing profile or want to search for one or more staffing profiles that use a particular phrase or fragment of text in its name. The search box is located in the upper-right corner.

To locate and open a staffing profile using the search box:

1. Log on to PPM Center.
2. In the search box, located on the right side of the menu bar, type @ followed by the text to search for in the staffing profile name. When you start typing the text, a submenu appears (the search is not case-sensitive).
3. Once you have finished typing your search text, select **Search for staffing profiles: <search_text>**.

If the search text matches only one staffing profile name, the Staffing Profile page for that staffing profile opens.

If the search text matches more than one staffing profile name, the Search Staffing Profiles page opens, displaying a list of staffing profiles with matching names. Click the name of a staffing profile to open its Staffing Profile page.

Using the Search Staffing Profiles Page

Use the Search Staffing Profiles page if you want to search for a staffing profile based on criteria such as staffing profile type or staffing profile status.

To locate and open a staffing profile using the Search Staffing Profiles page:

1. Log on to PPM Center.

2. From the menu bar, select **Search > Staffing Profiles**.

The Search Staffing Profiles page opens.

Search Staffing Profiles

Search for Staffing Profile to View

Profile Name contains: Status:

Staffing Profile For:

Sort By: Profile Name Ascending Descending Results Displayed Per Page: 50

Search

3. Provide search criteria in the appropriate fields.
4. Click **Search**.

The Search Staffing Profiles page reloads, displaying the results of your search.

5. Click the name of a staffing profile to open its Staffing Profile 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 4-6. Resource pool with unfilled resource requests

The screenshot displays the 'Resource Pool - Shared Developers' interface. At the top, it shows the Manager as 'Bridget Holbrook' and the Description as 'Resource Pool for Organization Unit - Applications, Region - MercuryUS'. Below this, there are buttons for 'Manage Pool Capacity', 'View Forecasted Demand', 'Manage Allocation', and 'View Resource Load'. The main section is titled 'Resource Requests' and contains a table with the following data:

Staffing Profile	Position	Status	Requested By	Response Needed By
Mainframe/account reporting	Senior Developer	Requested	Joseph Banks	Nov 15, 2006
ERP Upgrade	Network Administrator	Requested	Joseph Banks	Aug 23, 2006
ERP Upgrade	Senior Developer	Soft Booked	Joseph Banks	Aug 1, 2006

Below the table, there is a 'Related Resource Pools' section with a table showing the relationship between the current pool and the 'Global' pool as 'Parent'. At the bottom, there is a 'Notes' section with an 'Add Notes' button and a 'Done' button.

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 104](#) for details on what happens once assignment requests have been made.



If comments for staffing profile positions exceed field limitations, the comments are automatically truncated (a warning message is not displayed). Field limitations include comments larger than 2,000 characters and comments larger than 255 characters that are sent in notifications (the comment in the notification is truncated).

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.
Delete Staffing Profiles	The user can delete a staffing profile as long as no actuals are specified.
Delete Staffing Profiles with Actuals	The user can delete any staffing profile in the system.
Promise Unspecified Resource	The user can allocate a promised resource.

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. 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.

Configure Access for Staffing Profile: Project Actualization A

The following users have access to view the Staffing Profile for HP Project and Portfolio Management Center. Provide additional editing access on an individual basis.

View Access				
Username	Edit Header	Edit Positions	Edit Assignment Actual	Edit Security
Barbara Getty	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Benjamin U. Cesor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add User

Done **Cancel**

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**.

Clearing Future Forecast and Assignments

When a staffing profile is completed, you have an option to clear future forecast and assignments (forecast and assignments that go beyond the finish date) from the staffing profile. If the future forecast and assignments are cleared, they are no longer reflected in areas such as the Analyze Assignment Load and Analyze Resource Pool portlets, a resource's workload capacity, the Resource Finder, forecasted demand, the staffing profile, and the Resource Allocation Management page.

To clear future forecast and assignments (you must have the Edit Positions access grant):

1. Open the staffing profile.

If the staffing profile status is Completed, the **Clear Future Forecast and Assignment** button is enabled.

2. Click **Clear Future Forecast and Assignment**.

The Clear Future Forecast and Assignment dialog opens.

3. Specify a date from which to clear all forecast and assignment information. The date must be after the Profile Start date.



Verify the **Clear From** date. Once you click **OK**, the forecast and assignments cannot be restored.

4. Click **OK**.

Forecast and assignments starting from the specified date to the future are cleared from the staffing profile.

Deleting Staffing Profiles

If you have created a staffing profile that you no longer need, you can delete it.

1. Open the staffing profile.

If you have permission to delete the staffing profile, the **Delete Staffing Profile** button is enabled.

2. Click **Delete Staffing Profile**.
3. Confirm that you want to delete the staffing profile by clicking **Delete**.

The staffing profile is deleted.

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.

Calculating Forecasted Labor Costs from the Staffing Profiles

HP Financial Management allows you to organize and track costs. You can roll up actual costs from a work plan to the financial summary. If you choose to calculate forecasted labor costs from the staffing profile position forecasts and allocations, you are creating lines in the financial summary for planned labor costs that are automatically calculated using cost rate rules.

For more details on cost rate rules and financial summaries, see the *HP Financial Management User's Guide*. For more details about HP Financial Management settings in the Cost and Effort policy, see *HP Project Management User's Guide* and *HP Financial Management User's Guide*.

Entering Actuals Directly

You can specify 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 provide 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 forecasts and allocations (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.

Promised Allocations

Promised allocations are resource allocations who are not specifically named or identified. They can be used when a resource is allocated but the resource is not defined in PPM Center (for example, a subcontractor). Or, they can be used to commit resources and then assign a specific resource at a later time. Actuals cannot be entered for promised allocations.

This feature must be enabled and can be used from the staffing profile and Resource Allocation Management page. To enable this feature, set the `ENABLE_PROMISE_RESOURCE_ALLOCATION` parameter to **TRUE**. To add, assign, modify or delete promised allocations, the user must have the Resource Mgmt: Promise Unspecified Resources access grant.

Calculations, such as unmet demand, current demand, and remaining capacity, always include promised allocations. Even if this feature is disabled, if promised allocations exist (that is, values were entered before the feature was disabled), then promised allocations are used in all calculations even though they are not viewable from the interface.

Calculations that rely on a calendar (such as recalculating a promised allocation from hours to FTE or when rolling up forecasted labor costs from the staffing profile to a financial summary) use the regional calendar of the resource pool of the position to which the promised allocation belongs. The regional calendar determines the promised allocation's working and non-working days. A resource calendar cannot be set up for a promised allocation.

Forecast Planning

When planning for multiple projects in an organization, the staffing profile manager may find several projects require deliverables from his team. Rather than accessing the staffing profile of each project one at a time, the staffing profile manager can create his forecast plans for these multiple projects from a single page, the Forecast Planning page.

The Forecast Planning page allows the staffing profile manager to:

- View all positions and staffing profiles he owns, even if they span multiple projects
- Filter the positions and staffing profiles displayed
- View forecasts for all projects simultaneously to quickly and accurately estimate resource needs
- Edit resource forecasts across multiple staffing profiles
- Add positions to a staffing profile
- Send resource requests

Configuring the Forecast Planning Page

You can modify parameters in the `server.conf` file to change the number of staffing profile positions that appear on a single page and change the default units that appear in the Display Options dialog for measurements and groupings. Modifying these parameters are optional.

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

Table 4-8. Forecast planning server.conf parameters

Parameter	Description
FORECAST_PLANNING_PAGE_SIZE	The number of staffing profile positions that appear on a Forecast Planning page.
RM_DEFAULT Effort_TYPE	The default effort type that appears in the Display Options dialog. The staffing profile manager can change the effort type by modifying the <code>Measure Effort in</code> field in the Display Options dialog. Valid values: fte, hours, person days. Default: fte.
RM_DEFAULT PERIOD_TYPE	The default time period section that appears in the Display Options dialog. The staffing profile manager can change the time period section by modifying the <code>Group Periods by</code> field in the Display Options dialog. Valid values: week, month. Default: month.

Configuring Access Grants

To access the Forecast Planning page, users must have one of the following access grants:

- Resource Mgmt: Edit All Staffing Profiles
- Resource Mgmt: Edit Staffing Profiles

See the *Security Model Guide and Reference* for more information about access grants.

Accessing the Forecast Planning Page

You can access the Forecast Planning page from the menu bar.

➤ To access the Forecast Planning page, you must have the required access grants. Refer to [Configuring Access Grants](#).

1. Select **Open > Project Management > Staffing Profiles > Manage Forecast**.
2. Select the search criteria and click **Search**. For more information about the search fields, see [Search Filter on page 101](#).

The Forecast Planning page appears.



Forecast Planning

Filter For: **Modify** Filtered on 01:31 PM for: Staffing Profile:Staffing Profile 1, Staffing Profil... Showing 1 to 3 of 3 **Prev** **Next**

Showing from Sep 1, 2008 to Dec 31, 2009 **Change** **Display Options**

Staffing Profile	Resource Pool	Q3 '08	Q4 '08	Q1 '09	Q2 '09					
Position		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Staffing Profile 1										
Role 1	Global	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00
Role 3	Global	0.00	0.00	0.00	0.50	0.50	0.50	0.00	0.00	0.00
Staffing Profile 2										
Role 2	Global	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00

Tip: Click to highlight a cell; Shift-click to copy the value from the highlighted cell through the shift-clicked cell.

➤ The staffing profiles that appear in the Forecast Planning page are ones that you manage and do not have the status of Lock Down, Cancelled, or Completed.

➤ The Forecast Planning page loads data once. If the data is modified by another user (outside of the current Forecast Planning page or using another instance of the Forecast Planning page), the data on the current Forecast Planning page is not updated. If any modifications you made collide with modifications saved by another user, your modifications are not saved. The Forecast Planning page is reloaded and you must re-type your data. To avoid these collisions, you should save your modifications often.

Using the Forecast Planning Page

Use the Forecast Planning page to:

- Edit and save forecast data
- Add or remove a position
- Send a resource request
- View more detailed information about a staffing profile or position

You can also modify the amount of the information that appears on the Forecast Planning page by using the search and time period filters or adjusting display options.

Changing Forecast Data

To update a forecast value:

1. Select the cell to update.
2. Replace the existing value with a new forecast value.
3. Press **TAB** or click on another cell.

To copy a value from one cell to multiple cells:

1. Select a cell to copy.
2. Use **SHIFT + click** to copy the value to all contiguous cells. That is, all cells from the copied cell to the selected cell will have their values updated.

Saving Forecast Data Changes

To save changes made to or exit from the Forecast Planning page, do one of the following:

- To save changes made to the Forecast Planning page, click **Save**.
- To exit and save any changes made to the Forecast Planning page, click **Done**.
- To cancel any changes made to the Forecast Planning page since the last save, click **Cancel**.



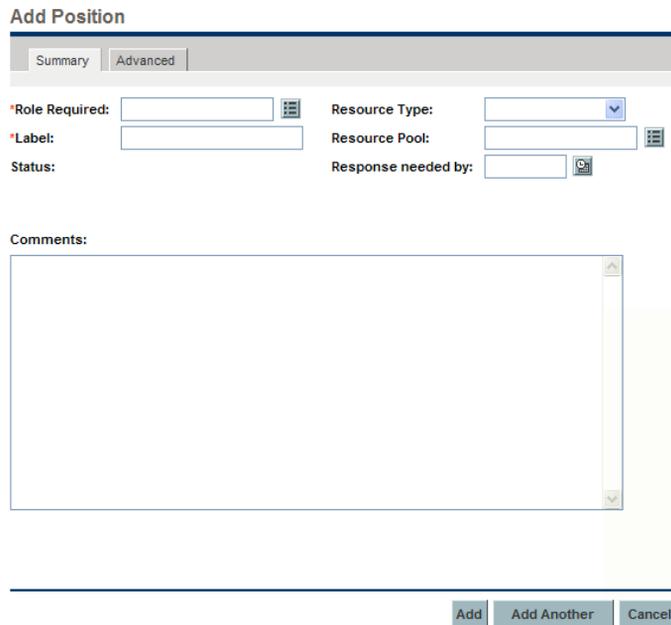
If you made changes to and try to save data that has been recently modified by another user (that is, the data that appears in the Forecast Planning page is not the most current data), a message appears and the data is not saved. The Forecast Planning page is reloaded and you must re-type your data.

Adding a Position

To add a position to a staffing profile, do the following:

1. From the Forecast Planning page, click  next to the staffing profile and select **Add Position**.

The Add Position dialog box opens.



2. Specify a **Role Required**, **Position Label** (name of the position), and **Resource Pool**.
3. (Optional) Provide data for any optional fields.



A message appears if any data provided does not match the filter information specified in the Search for Staffing Profile dialog (the added position will not appear in the Forecast Planning page).

For a description of the fields, see [step b on page 80](#).

4. Repeat as necessary.

You can add more than one position at a time without returning to the Forecast Planning page by clicking **Add Another** once you have filled in the values for one position.

5. Click **Add**.

The Forecast Planning page reloads with the position(s) added.

Removing a Position

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

1. Click next to the position to select it for removal. The position and its data remain, but appear in gray.
2. Click **Save** on the Forecast Planning page.

You can re-add a position that has been selected for removal by clicking . This icon only appears when a position has been selected for removal but *before* clicking the **Save** button on the Forecast Planning page.

Sending a Resource Request

To send a resource request for one or more positions of a staffing profile:

1. From the Forecast Planning page, click  next to the staffing profile and select **Send Requests**.

The Send Resource Requests dialog box opens.

Send Resource Requests

Resource requests for the following positions will be sent.

Position	Resource Pool	Total # of Hours Requested	Position Status	Response needed by
<input checked="" type="checkbox"/> Role 2	Global	504.00	New	<input type="text"/> 

Check all

2. Select the checkbox next to each position for which you want to send a resource request.

3. Specify a date by which a response should be made in the **Response needed by** date field.
4. Click **Send**.

The resource requests are sent to the appropriate resource pools. See [Assigning Resources to Tasks on page 152](#) for details about assigning resources.

Viewing Information about a Staffing Profile or Position

You view additional information about a staffing profile or position by using a tooltip or opening an overview window.

Viewing Staffing Profile Information

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

- Place the cursor on a staffing profile to view the tooltip. The following information appears: staffing profile name, status, staffing profile manager, project name, 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 that appears is for reference only. Do not edit the staffing profile from this window. If you make changes in this window, changes in the Forecast Planning page may not be saved.

Viewing Position Information

You can view information about a position in two different ways:

- Place the cursor on a position to view the tooltip. The following information appears: position name, status, response needed by, role, resource pool, and resource type.
- Click on the position name to open a position overview page in another window.

Filtering and Sorting

Filtering allows you to modify the information that appears in the Forecast Planning page. The search filter allows you to filter on staffing profiles, roles, resources pools, and positions. The time period filter allows you to filter on a start and end period. You can also sort the information by staffing profile.

The filters currently applied to the Forecast Planning page appear at the top of the table along with the time the page was opened. If the list of applied filters is truncated, you can place the cursor on the filter to show all of the applied filters.

Search Filter

Use the search filter to select multiple items on which to filter the Forecast Planning page. To set the search filter, do the following:

1. Click **Modify** next to the **Filter For** header.

The Search Positions page appears.

Search Positions

Staffing Profile:	<input type="text" value="Staffing Profile 1; Staffing"/>		Role:	<input type="text"/>	
Resource Pool:	<input type="text"/>		Position Name (contains):	<input type="text"/>	

2. Provide the information for one or more fields on which you want to filter.

Field Name	Description
Staffing Profile	Select one or more staffing profiles. This filter displays data for staffing profile positions contained in the selected staffing profile(s).
Role	Select one or more roles. This filter displays data for staffing profile positions that contain the selected role(s).
Resource Pool	Select one or more resource pools. This filter displays data for staffing profiles that belong to the selected resource pool(s).
Position Name (contains)	Type a text string. This filter displays data for staffing profile positions that contain the typed text in the position name.

3. Click **Search**.

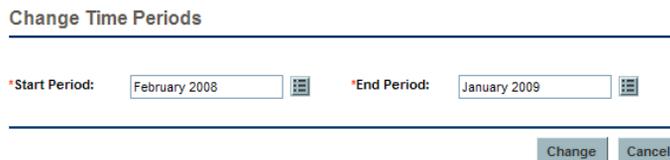
Time Period Filter

Showing from *<date>* to *<date>* is the time period of the data that appears. The default time period that appears 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 time period that appears (Showing from *<date>* to *<date>*).

The Change Time Periods dialog appears.



The dialog box is titled "Change Time Periods". It features two input fields: "*Start Period:" with the value "February 2008" and "*End Period:" with the value "January 2009". Each field has a small calendar icon to its right. At the bottom right of the dialog, there are two buttons: "Change" and "Cancel".

2. Select the Start Period and End Period dates. The months specified are included in the time period of the data that appears.
3. Click **Change**.

Sorting by Staffing Profile

By default, the list of staffing profiles are sorted in alphabetical order. You can sort the staffing profiles in reverse alphabetical order by clicking on the staffing profile header. The Sort icon (▲) appears next to the staffing profile header.

Changing the Display Options

Display options alter the amount of data that appears in the Forecast Planning page. You can change the period type and effort type.

To modify display options, do the following:

1. Click **Display Options**. The change Display Options dialog appears.
2. Edit one or more of the following.

Field Name	Description
Group Periods by	The period type (how the time period is divided). Select Week, Month, or Quarter.
Measure Effort in	The effort type (how effort is measured). Select FTE, Hour, or Person Day.

3. Click **Change**.

Displaying Positions

You can expand and collapse a staffing profile to view its positions in the Forecast Planning page:

- To view all positions of all staffing profiles, click .
- To hide all positions of all staffing profiles, click .
- To view the positions of a staffing profile, click  next to the staffing profile.
- To hide the positions of a staffing profile, click  next to the staffing profile.

Displaying Additional Pages of Data

Depending on the filters you select, data may appear on more than one page of the Forecast Planning page. In the top-right corner of the table, you can see how many pages of data 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**.

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 85](#)* 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 4-7. Resource pool with unfilled resource requests

Resource Pool - Shared Developers

Manager: Bridget Holbrook **Description:** [Additional Actions](#)
Resource Pool for **Organization Unit - Applications, Region - MercuryUS** **Status:** Enabled
This Resource pool rolls up to **Global**

[Manage Pool Capacity](#) [View Forecasted Demand](#) [Manage Allocation](#) [View Resource Load](#)

Resource Requests Showing 1 to 3 of 3 [Prev](#) [Next](#)

Staffing Profile	Position	Status	Requested By	Response Needed By
Mainframe/account reporting	Senior Developer	Requested	Joseph Banks	Nov 15, 2006
ERP Upgrade	Network Administrator	Requested	Joseph Banks	Aug 23, 2006
ERP Upgrade	Senior Developer	Soft Booked	Joseph Banks	Aug 1, 2006

Showing 1 to 3 of 3 [Prev](#) [Next](#)

Related Resource Pools

Resource Pool	Relationship	Primary Organization Unit
Global	Parent	

Notes
[Add Notes](#)

[Done](#)

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 **Unmet Demand** 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:
 - Click **Assign** to assign one or more resources.
 - 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**.



If one or more specific resources were requested, the Specific Resources Requested dialog opens. You can select and assign the specified resource(s) or you can click **Choose Other Resources** to assign other resources.

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 **Committed**, 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 a Resource Request from the Resource Allocation Management Page* on page 139 and *Forwarding a Resource Request from the Resource Allocation Management Page* on page 138 for more information.

Assigning Promised Allocations

To fill a resource assignment request with a promised allocation:

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 **Unmet Demand** in orange. The position requesting resources will be selected.

3. Assign a promised allocation in one of the following ways.



You must have the Resource Mgmt: Promise Unspecified Resources access grant and the parameter `ENABLE_PROMISE_RESOURCE_ALLOCATION` must be enabled to use the **Promise** button.

- From the Staffing Profile page, select a checkbox next to Unmet Demand (only one checkbox can be selected) and click **Promise**.

The Adjust Allocations for Promise dialog box opens, displaying the promised allocation and status.

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

4. Make any changes to the promised resource's commitment to the staffing profile line.
 - You can change the nature of the promise's commitment between **Soft Booked** and **Committed**, or you can remove it entirely. The commitment defaults to **Soft Booked**.
 - You can change the number of hours/FTE/person days committed to the staffing profile. The values default to the position's unmet demand.
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.

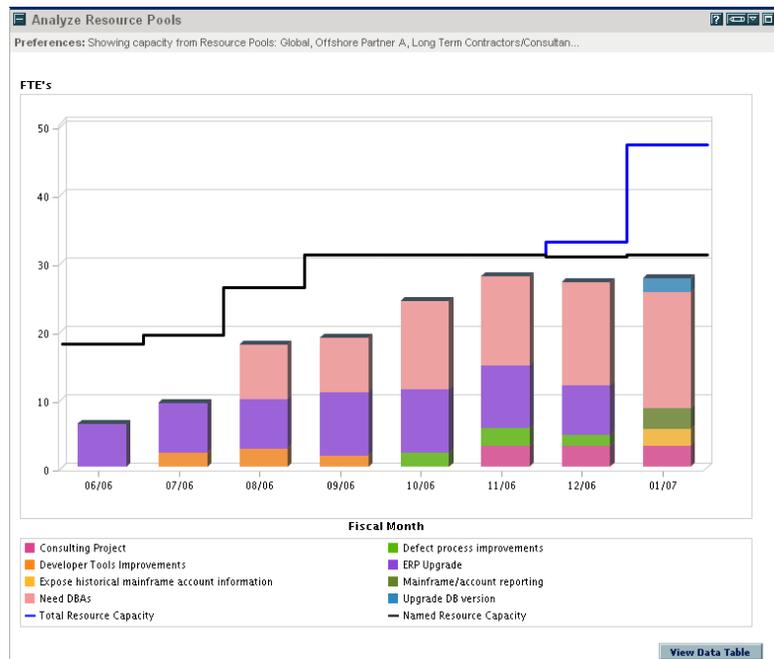
Analyzing Resource Pools

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 4-8* shows the Analyze Resource Pools portlet.

Figure 4-8. 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 4-9](#).

Table 4-9. 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 4-9. 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 Committed, Soft-booked, and Unmet Demand.



If a staffing profile is completed, future forecast and assignments (those past the finish date of the staffing profile) can be cleared and will not display in the portlet. See [Clearing Future Forecast and Assignments on page 89](#) for more information.

If large amounts of data are supplied to the portlet, there may be performance problems. Therefore, thresholds for this portlet can be specified in the `server.conf` file and default values are provided for optimal performance.

- `ARP_MAX_RESOURCES`: the maximum number of total resources. The default value is 300.
- `ARP_MAX_RESOURCE_POOLS`: the maximum number of total resource pools. The default value is 30.

Refer to the *Installation and Administration Guide* for more information about editing the `server.conf` file.

When a threshold is exceeded, the portlet does not display. Instead, a message containing the threshold value and current value that exceeds the threshold appear. To make the portlet display, you can edit the preferences of the portlet

so that the threshold is no longer exceeded. HP does not recommend that you increase the threshold values as this may cause performance problems.

If the amount of data you need to analyze exceeds the thresholds, you can export the data to Microsoft Excel. To export Analyze Resource Pool portlet data to Microsoft Excel, do the following:

1. Select **Open > Resource Management > Data Exports > Analyze Resource Pool**.
2. Set the filter criteria for export.

An additional field is included for the filter criteria: Include Detailed Data. Select this checkbox if you want to get a breakdown of total resource capacity viewed against load by staffing profile (data displayed in the Analyze Resource Pool Breakdown table).

3. Click **Export To Excel**.

The date when the snapshot was taken is included in the export.

Analyze Resource Pools Breakdown Table

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 4-9*, 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 4-9. Analyze Resource Pools Breakdown table

Resource Supply and Demand for Global,Offshore Partner A,Apps Pool,Long Term Contractors/Consultants,QA Engineers,Shared DBAs,Shared Developers

Resource Pool Details(FTEs)

	Q4 '06		Q1 '07			Q2 '07		
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Named Resources	32.7	32.5	32.7	32.7	32.7	32.7	32.7	32.7
Unnamed Resources	0	2.1	16.09	16.11	17	17	17.14	17
Total Capacity	32.7	34.6	48.79	48.81	49.7	49.7	49.84	49.7
Total Forecast	29.86	27.9	26.5	26.25	26	13	10	14.1
Soft Booked	5.43	5.1	4	4	4	2	2	2.1
Committed	9.43	8.05	5	5	5	3	3	5.5
Total Assignments	14.87	13.15	9	9	9	5	5	7.6
Unmet Demand	14.99	14.75	17.5	17.25	17	8	5	6.5
Remaining Capacity	17.83	21.45	39.79	39.81	40.7	44.7	44.84	42.1
Breakdown By Role								
Developer - Interactive D...								
Named	4	4	4	4	4	4	4	4
Unnamed	0	0	5	5	5	5	5	5
Total	4	4	9	9	9	9	9	9
Assigned Total	1	0.55	0	0	0	0	0	0
Developer Tools Impr...	0	0	0	0	0	0	0	0
Defect process Impr...	1	0.55	0	0	0	0	0	0
Database Administrator								
Named	9	8.8	9	9	9	9	9	9
Unnamed	0	2.1	6.09	6.11	7	7	7.14	7
Total	9	10.9	15.09	15.11	16	16	16.14	16
Assigned Total	8.43	8.05	6	6	6	5	5	5.5

Export Resource Pool Details

Done

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 exported to Microsoft Excel for further manipulation.

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

Table 4-10. Analyze Resource Pools Breakdown table row descriptions
(page 1 of 2)

Row	Description
Named Resources	Maximum amount of effort that can be allocated for named resources.
Unnamed Resources	Maximum amount of effort that can be allocated for unnamed resources.
Total Capacity	Maximum total amount of effort that can be allocated for named and unnamed resources.
Total Forecast	Anticipated demand for named and unnamed resources.
Soft Booked Resources	Amount of effort provided by allocated resources that are not yet committed.
Committed Resources	Amount of effort provided by allocated resources that are committed.
Soft Booked Promises	Amount of effort provided by promised resources that are not yet committed. Viewable if the <code>ENABLE_PROMISE_RESOURCE_ALLOCATION</code> parameter is enabled.
Committed Promises	Amount of effort provided by promised resources that are committed. Viewable if the <code>ENABLE_PROMISE_RESOURCE_ALLOCATION</code> parameter is enabled.
Total Assignments	Total effort provided by allocated and promised resources that are soft-booked and committed.
Unmet Demand	Amount of effort needed from unallocated resources. Unmet Demand = Total Forecast – Total Assignments
Remaining Capacity	The available capacity of the selected resource pool. Remaining Capacity = Total Capacity – Total Assignments
Breakdown by Role	
Named	Maximum amount of effort that can be allocated for named resources for the specified role.
Unnamed	Maximum amount of effort that can be allocated for unnamed resources for the specified role.

Table 4-10. Analyze Resource Pools Breakdown table row descriptions
(page 2 of 2)

Row	Description
Total	Maximum total amount of effort that can be allocated for named and unnamed resources for the specified role.
Forecast Total	Anticipated demand for named, unnamed, and promised resources for the specified role.
Assigned Total	Total amount of effort that is allocated for named, unnamed, and promised resources for the specified role.

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.
- Actual effort includes promised allocations.



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 4-10. Project Settings: Cost and Effort policy

Cost and Effort

Resource Load Settings

Work Load Category: ▼

Staffing Profile represents the work load imposed by the project
 It is recommended that you use the staffing profile as the planned work load for your project. This allows the project manager to plan and schedule the project in phases without concern that the resources will appear unutilized.
 In this option, the staffing profile represents both planned and actual resource load. Planned load is always entered directly on the staffing profile. Actual load can be entered directly on the staffing profile or on the work plan or time sheets.

Enter actuals directly on the staffing profile
 Use actual information from the work plan and Time Management when viewing actuals in the staffing profile
 Actual Effort must be tracked on the work plan in order to use this option.

Work plan task assignments represent the work load imposed by the project
 This option is only recommended for short projects when the work plan is fully defined and scheduled.
 Scheduled Effort and Actual Effort must be tracked on the work plan in order to use the work plan as work load.

Scheduled Effort in the Work Plan

Use Scheduled Effort during planning
 Tracking Scheduled Effort in the work plan is required when automatically calculating planned costs or when the work plan represents resource work load.

Automatically calculate Scheduled Effort
 Manually enter Scheduled Effort per task assignment

Allow override of effort calculation mode in the work plan

Actual Effort in the Work Plan

Track Actual Effort per resource assignment
 Tracking Actual Effort in the work plan is required when automatically calculating actual costs, when using Time Management to track actuals against the work plan, or when the work plan represents resource work load.

Require resources to enter % Complete along with actual effort
 If this option is selected, when a resource enters actual effort for an assigned task (on time sheets or elsewhere), the resource must also specify a non-zero value for % Complete. If this option is not selected, resources do not need to specify % Complete, and project managers can specify it later.

Track Estimated Remaining Effort per resource assignment
 Tracking Estimated Remaining Effort is not allowed when using Time Management to track actuals against the work plan at a summary task or project level. Once actuals have been entered, this option cannot be deselected.

Time Management

Use Time Management to track actuals against this project.
 When the project has a work plan, you can integrate with Time Management if your organization uses time sheets, allowing resources to enter their actuals data in a single location.

Track time at the:

Task level
 Summary tasks at hierarchy level: 2 ▼
Not available when tracking Estimated Remaining Effort

Project level
Not available when tracking Estimated Remaining Effort

Allow the following to report time on this project:

Project resources
Resources assigned to tasks, resources on the staffing profile, and summary task owners.

Assigned resources
Resources can log time against tasks to which they are assigned, or (if tracking time at a summary task or project level) to summary tasks above them in the project hierarchy.

All resources
All resources who can see the project can log time against it.

After a task is complete, allow time to be logged:

 Day(s) more

 Time period(s) more (for time period in which the task is complete, enter 0)

Any time

Do not allow. Resources cannot add tasks that are complete to their timesheets.

Time logged against this project must be approved by a project representative from the following group:

Participant Group Project Managers ▼

Security Group ▼

Financial Management

Allow capitalized costs on this project.

Enable Financial Management for work plan

Planned labor costs on the work plan will be:

Automatically calculated based on scheduled effort and rates
 Manually entered on tasks and rolled up to summary tasks

Actual labor costs on the work plan will be:

Automatically calculated based on actual effort and rates
 Manually entered on tasks and rolled up to summary tasks

Costs on the Financial Summary

Calculate the forecasted labor costs from the staffing profile.

Calculate the actual labor costs from the work plan and time sheets. (Note: Financial Management for the work plan must be enabled.)

Calculate the actual non-labor costs from the work plan. (Note: Financial Management for the work plan must be enabled.)

Once HP Time Management is activated for the project, the Actual Effort values provided will roll up into the staffing profile, assuming the staffing profile is set properly (see *Automatic Tracking of Actuals for Staffing Profiles* on page 116).

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 4-11*, 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 4-11. 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				
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 provided 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 **Open > Resource Management > Resources > Manage Allocations.**
 - 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.**



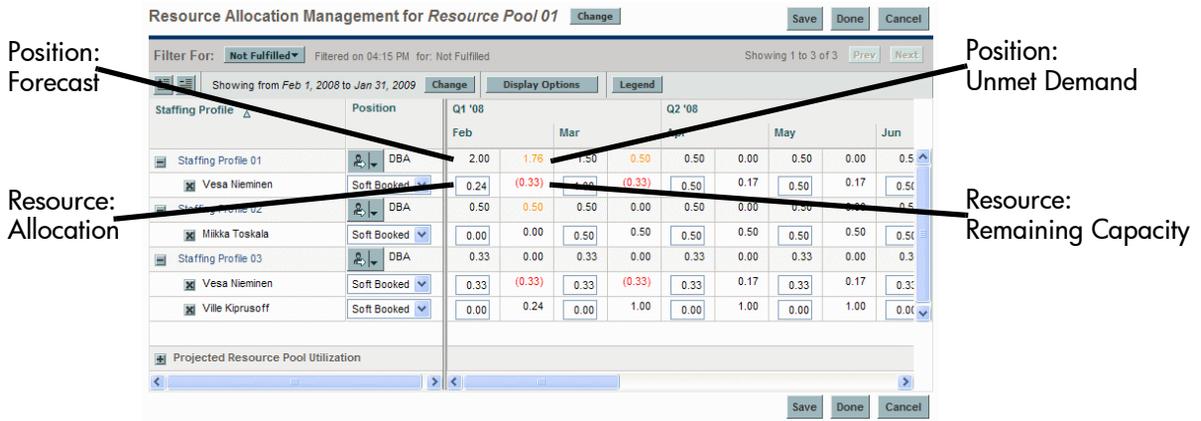
You must be the manager of at least one resource pool in order to access the Resource Allocation Management page.

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-type your data. To avoid these collisions, you should save your modifications often.

Interpreting the Resource Allocation Management Page

Figure 4-12. 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 4-11. 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 – (Named Resource Allocations + Promised Allocations)

Table 4-11. Data displayed in the Resource Allocation Management page
(page 2 of 2)

Time Period Data	Description
Resource: Allocation	<p>Modifiable capacity of a resource allocated to a staffing profile position.</p> <p>For promised allocations, if you do not have the Resource Mgmt: Promise Unspecified Resources access grant or if the <code>ENABLE_PROMISE_RESOURCE_ALLOCATION</code> parameter is not enabled, this data is view-only and not modifiable.</p> <p>When this value is updated, the unmet demand value is automatically updated.</p> <p>This information is located in the first column of a time period section for a resource.</p>
Resource: Remaining Capacity	<p>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.</p> <p>For a promised resource, there is no remaining capacity and this cell is empty.</p> <p>This information is located in the second column of a time period section for a resource.</p> <p>Remaining Capacity = Resource Capacity – (Named Resource Allocations + Promised Allocations)</p>
Projected Resource Pool Utilization	<p>The allocation and capacity for the selected resource pool. Click  to view the data. This information changes dynamically when resource allocations are modified.</p> <p>NOTE: Loading this data may cause system performance to decrease.</p> <p>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.</p> <p>See Viewing Projected Resource Pool Utilization from the Resource Allocation Management Page on page 142 for more information.</p>



Even if the promised allocation feature is disabled, if promised allocations exist (that is, values were entered before the feature was disabled), then promised allocations are used in all calculations (such as current demand and remaining capacity) even though they are not viewable from the interface.

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 4-12. Quick filters for the Resource Allocation Management page

Quick Filter	Description
All	Displays all positions for which resources have been requested, soft-booked, partially assigned, fulfilled, or rejected. New positions are not displayed.
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).
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. A staffing profile with the status of Lock Down, Completed, or Cancelled is not displayed by the filter.
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.

Search for Staffing Profile Positions

Position Status:	<input type="text"/>		Staffing Profile Status:	<input type="text"/>	
Role:	<input type="text"/>		Skill:	<input type="text"/>	
Staffing Profile Manager:	<input type="text"/>		Position Name (contains):	<input type="text"/>	
Resource Type:	<input type="text"/>		Resources:	<input type="text"/>	
Staffing Profile:	<input type="text"/>				

3. Provide 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, Cancelled, Completed, and Lock Down. Note that 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)	Specify a text string. This filter displays data for staffing profile positions that contain the specified 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). A staffing profile with the status of Lock Down, Completed, or Cancelled is not displayed by the filter.

4. Click **Search**.

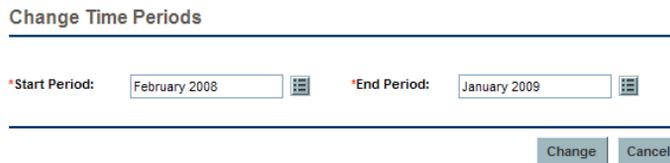
Time Period Filter

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.



The dialog box is titled "Change Time Periods". It contains two input fields: "*Start Period:" with the value "February 2008" and "*End Period:" with the value "January 2009". Each field has a small calendar icon to its right. At the bottom right of the dialog are two buttons: "Change" and "Cancel".

2. Specify the Start Period and End Period dates.

Field Name	Description
Start Period	Specify the initial time period from which to start the display of data.
End Period	Specify 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.

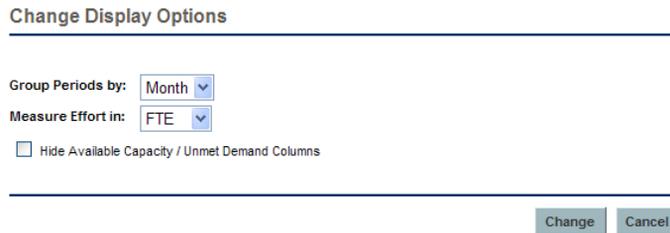
Changing the Display Options of the Resource Allocation Management Page

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 appears.



The dialog box is titled "Change Display Options" and is enclosed in a thin blue border. It contains the following elements:

- Group Periods by:** A dropdown menu with "Month" selected.
- Measure Effort in:** A dropdown menu with "FTE" selected.
- Hide Available Capacity / Unmet Demand Columns
- At the bottom right, there are two buttons: "Change" and "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 PPM Application Configuration page or <code>server.conf</code> 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 PPM Application Configuration page or <code>server.conf</code> 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 data 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 Keys or `server.conf` Parameters

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

See the *Installation and Administration Guide* for more information about using the PPM Application Configuration page or editing the `server.conf` file.

Table 4-13. Resource allocation management `server.conf` parameters
(page 1 of 2)

Parameter	Description
<p>ENABLE_PROMISE_RESOURCE_ALLOCATION</p>	<p>Enable or disable the allocation of promised resources. Promised resources or allocations are resource allocations who are not specifically named or identified. They can be used when a resource is allocated but the resource is not defined in PPM Center (for example, a subcontractor) or to commit a resource and then assign a specific resource at a later time.</p> <p>If enabled but the user does not have the Resource Mgmt: Promise Unspecified Resources access grant, promised allocations are view-only.</p> <p>If enabled or disabled, promised allocations are used in all calculations (such as current demand and remaining capacity).</p> <p>Promised allocations may exist when this parameter is disabled if values were entered before the parameter was disabled. That is, the parameter was enabled, promised allocations were entered, and then the parameter was disabled.</p> <p>If disabled, any existing promised allocations are view-only.</p> <p>Default: false (disabled)</p>
<p>RAMP_MAX_RA_PER_PAGE</p>	<p>The maximum number of rows of data to display on a single page. Default: 200.</p>
<p>RAMP_PAGE_SIZE</p>	<p>The maximum number of staffing profile positions to display on a single page. Default: 20.</p>

Table 4-13. Resource allocation management server.conf parameters
(page 2 of 2)

Parameter	Description
RM_ALLOWED_EFFORT_TYPES	The effort types from which the resource pool manager can select for the <code>Measure Effort in</code> 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 <code>Measure Effort in</code> 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 <code>Group Periods by</code> 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 a Resource to a Resource Request from the Resource Allocation Management Page

To assign a resource, do the following:

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



If one or more specific resources were requested, the Specific Resources Requested dialog opens. You can select and assign the specified resource(s) or you can click **Choose Other Resources** to assign other resources.

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.

Assigning a Resource to a Promised Allocation from the Resource Allocation Management Page

A promised allocation that has been assigned to a position can be assigned a specific resource (you must have the Resource Mgmt: Promise Unspecified Resources access grant and the parameter `ENABLE_PROMISE_RESOURCE_ALLOCATION` must be enabled):

1. Click  next to Promise and select **Assign**.
2. Select a resource to assign to the promised allocation.



Only one resource can be assigned to a promised allocation.

The allocation provided for the resource is the lowest value of either the capacity of the resource or the promised allocation. If the resource's capacity is used and it is lower than the promised allocation, the promised allocation in the staffing profile remains, showing the remaining allocation (remaining allocation = initial promised allocation – the resource's remaining capacity). If there is no remaining allocation, Promise is removed (displayed in gray).

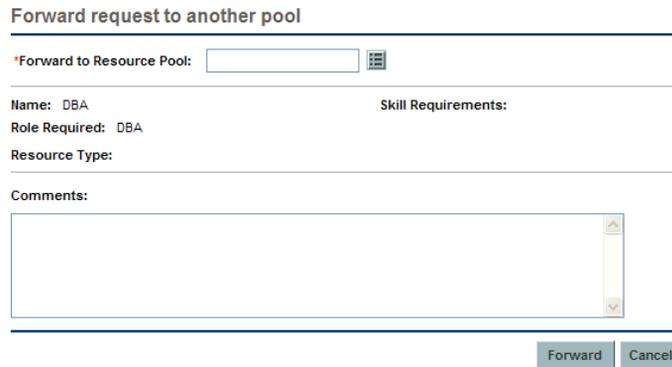
3. Click **Save** on the Resource Allocation Management page.

Forwarding a Resource Request from the Resource Allocation Management Page

To forward a resource, do the following:

1. From the Resource Allocation Management page, click  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:

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**.

Promising Allocations from the Resource Allocation Management Page

To allocate a promise (you must have the Resource Mgmt: Promise Unspecified Resources access grant and the parameter `ENABLE_PROMISE_RESOURCE_ALLOCATION` must be enabled), do the following:

1. From the Resource Allocation Management page, click  next to the position to promise and select **Promise**.

A new line appears with Promise as the resource. The status defaults to soft-booked and the promised allocation defaults to the position's unmet demand. You can edit the promised allocation value as needed.

2. Click **Save**.



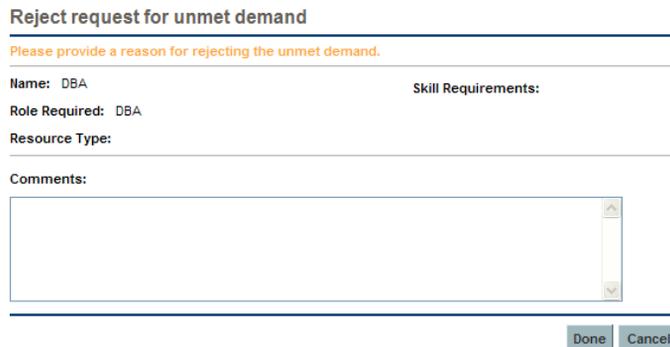
You must click **Save** from the Resource Allocation Management Page in order to save any promises you made.

Rejecting a Resource Request from the Resource Allocation Management Page

To reject a resource, do the following:

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

The Reject Request for Unmet Demand dialog opens.



Reject request for unmet demand

Please provide a reason for rejecting the unmet demand.

Name: DBA Skill Requirements:

Role Required: DBA

Resource Type:

Comments:

Done Cancel

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.

Removing a Promised Allocation

A Promise that has been assigned to a position can also be removed from that position (you must have the Resource Mgmt: Promise Unspecified Resources access grant and the parameter `ENABLE_PROMISE_RESOURCE_ALLOCATION` must be enabled). To remove a promised allocation, do the following:

1. Click  next to Promise and select **Remove**.



If a Promise has been added but the page has not been saved, the Promise is immediately removed (you do not have the option to re-add the Promise).



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

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

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-type your data.

If financial management is enabled and if forecasted labor costs on the financial summary are to be calculated (rolled up) from the staffing profile, allocation data changes are reflected in the financial summary after the allocation data changes are saved and when the Staffing Profile Financial Summary Sync Service runs.

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 4-14. 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 Resources	The total number of named resources in the selected resource pool committed to a staffing profile.
Total Soft Booked Resources	The total number of named resources in the selected resource pool not yet committed to a staffing profile.
Total Committed Promises	The total number of promised resources in the selected resource pool committed to a staffing profile.

Table 4-14. Data displayed in the Projected Resource Pool Utilization section
(page 2 of 2)

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

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 an HP 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

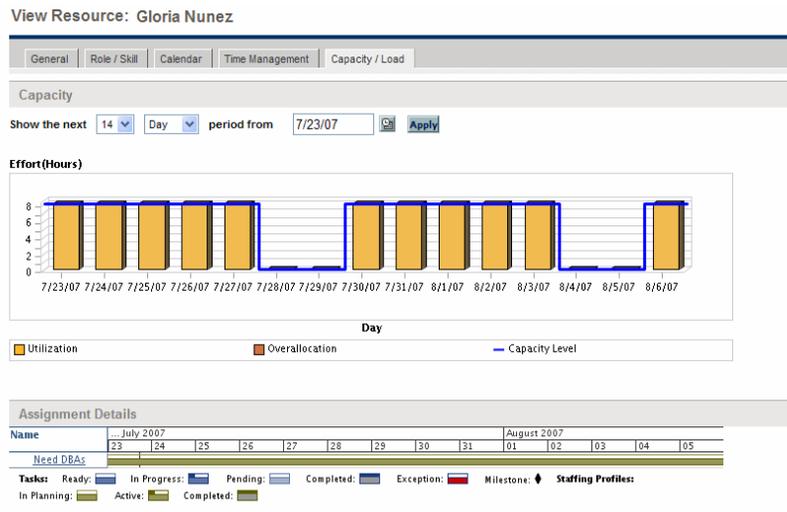
Assigning Requests

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 **Open > 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

Work Plan for Exposing Mainframe Account Data (In Planning : Health Green)

View: Schedule View Change View

Filter for: All Tasks All Tasks Total Tasks: 26

Expand to: Level

Seq	Name	Status	Role	Resources	Schedule...	Scheduled...	Scheduled...	Sched...	Un
20	Acceptance, Training, Rollout	In Planning			5.00	8/29/10	9/3/10	88.00	
21	Acceptance Test	Pending Pre...	Network Administrator		3.00	8/29/10	9/1/10	24.00	
22	Rework	Pending Pre...	Java Developer	Joseph Boyle	3.00	8/29/10	9/1/10	24.00	
23	Design Training	Pending Pre...		Barbara Getty	1.00	8/29/10	8/30/10	8.00	
24	Training	Pending Pre...		Barbara Getty	2.00	8/31/10	9/1/10	16.00	
25	Deploy to Production	Pending Pre...	Daniel Pavels...		2.00	9/2/10	9/3/10	16.00	

To book a role for a task:

1. Open the work plan.
2. Select the task to which you want to assign a role.
3. Provide a value in the **Role** field.
4. 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 150.

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 157 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

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

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

View by	Available details	Description
Role	Forecast	Anticipated demand for named and unnamed resources.
	Allocation	Total effort allocated (includes assigned and promised resources).
	Scheduled Effort	Total effort required.
	Actual Effort	Total effort completed.
Resource	Allocation	Total effort allocated.
	Scheduled Effort	Total effort required.
	Actual Effort	Total effort completed.

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 **Open > Resource Management > Analyze Resources > Search Resource 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

Search Resource Availability

Select a Resource for Staffing Profile Line Showing 1 to 3 of 3 [Prev](#) [Next](#)

Resource Name Δ	Suitability Score	Availability Score	Skill Score	Projected Utilization	Weeks
<input type="checkbox"/> John Groom	86%	73%	100%	128%	09/10 11/19
<input type="checkbox"/> Offshore Developer 2	95%	100%	80%	100%	
<input type="checkbox"/> Offshore Developer 3	90%	100%	60%	100%	
<input type="checkbox"/> Check all					

0 1 25 50 75 100 Over Resource Not Enabled

[View Resource Load](#) [Compare Skills](#) Showing 1 to 3 of 3 [Prev](#) [Next](#)

Resources displayed in grey belong to a Resource Pool that is managed by someone else.

Refine Search Criteria and Search Again

*Availability within dates: To:

Search for resources with all of the following skills:

Skill	Ideal Proficiency
<input checked="" type="checkbox"/> JSP/Servlets	Level 1 (Low)

[Add Skill](#)

Only show results with a Suitability Score greater than: %

Resource Name: Role: Resource Category:
 Location: Department:
 Organization Unit:

Sort By: Ascending Descending *Results Displayed Per Page:

[Search](#)

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

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 the Suitability Score on page 165 for more detailed information on how this score is computed.

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

Field/Button Name	Definition
Availability Score	A numeric score representing the resource's availability for the entity in question, based on their current load and capacity. A higher score (close or equal to 100) means better availability. See Calculating the Availability Score on page 167 for more detailed information on how this score is computed.
Skill Score	A numeric score representing the resource's suitability for the entity in question relative to the skill required. A higher score (close or equal to 100) means better suitability. See Calculating the Skill Score on page 171 for more detailed information on how this score is computed.
Projected Utilization	How much the resource would be used if the assignment were made. See Calculating the Projected Utilization on page 172 for more detailed information on how projected utilization is computed.
Current Utilization (chart)	How much the resource is currently being used during the selected time period, displayed in a chart. Utilization is expressed by color. Current utilization is current load divided by capacity for the given time period.
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 3 of 3)

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 provided 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 providing filter criteria in 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

Resource Name	9/10/06		9/17/06		9/24/06		10/1/06	
	Sched	Actual	Sched	Actual	Sched	Actual	Sched	Actual
John Groom								
Total Capacity	40	40	40	40	40	40	40	40
Total Assignments	40	0	40	0	40	0	0	0
Available Capacity	0	40	0	40	0	40	40	40
Offshore Developer 2								
Total Capacity	40	40	40	40	40	40	40	40
Total Assignments	0	0	0	0	0	0	0	0
Available Capacity	40	40	40	40	40	40	40	40
Offshore Developer 3								
Total Capacity	40	40	40	40	40	40	40	40
Total Assignments	0	0	0	0	0	0	0	0
Available Capacity	40	40	40	40	40	40	40	40

To access this table:

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

The Resource Load Breakdown page opens. Resources are listed alphabetically, by last name.

The Resource Load Breakdown table can be filtered to show different data.

Filter	Description
View	<p>Chooses the data to display in the table.</p> <p>Assignment Summary — Shows each resource's assignment total in working hours.</p> <p>Assignment Details — Shows the work items that contribute to the resource's assignment totals.</p>
Highlight	Select Overallocation to highlight overallocation data in red, Availability to highlight availability data in green, or neither.

The following table lists the column and row descriptions.

Column/Row	Description
Sched	The scheduled effort of the resource. Scheduled effort is evenly distributed across working days from the scheduled start date to the scheduled finish date. Hours per week may differ based on regional and personal calendars (for example, holidays and personal vacations). Decimal values may not be displayed when viewing this table from the Analyze Assignment Load portlet.
Actual	The actual effort of the resource.
Total Capacity	Maximum total amount of effort that can be allocated for the resource.
Total Assignments	Total effort provided by the resource.
Available Capacity	The remaining capacity of the resource. Available Capacity = Total Capacity – Total Assignments

2. 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

Resource Name	Role	Overall Skill Score	Skill Score	Desired Skills	Level
Cindy Ruth	Developer - Java/Web	30%	60%	HTML	5
			0%	JavaScript	-
Sally Smith	Developer - Applicat	35%	0%	HTML	-
			70%	JavaScript	4
Tony Sanchez	Developer - Java/Web	60%	60%	HTML	5
			60%	JavaScript	5

To access this table:

1. Click **Compare Skills** in the Resource Finder window. The Compare Resource Skills page opens.

Column	Description
Resource Name	The name of the resource.
Role	User responsibility that helps describe resource requirements.
Overall Skill Score	The average of all skill scores of a resource.
Skill Score	A numeric score representing the resource's suitability relative to the skill required. A higher score (close or equal to 100) means better suitability. See Calculating the Skill Score on page 171 for more detailed information on how this score is computed.
Desired Skills	Skills selected in the Resource Finder that you would like the resource to possess.
Level	The proficiency level of the resource for the specified skill.

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

Resource Finder Calculations

Adjusting the Suitability Score

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

- **Availability Score.** See *Calculating the Availability Score* on page 167 for more detailed information on how this score is computed.
- **Skill Score.** See *Calculating the Skill Score* on page 171 for more detailed information on how this score is computed.
- **Role Score.** If the resource's role matches the role requirement, this value is 100%. If the resource's role does not match the role requirement, this value is 0%.

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

$$\text{Availability Weight} = 100 - \text{Skill Weight} - \text{Role Weight}$$

$$\text{Suitability Score} = \text{Availability Score} * (\text{Availability Weight}\%) + \text{Skill Score} * (\text{Skill Weight}\%) + \text{Role Score} * (\text{Role Weight}\%)$$

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. When added to the skill weight, the total should not exceed 100. Possible values: 0-100	25
RESOURCE_FINDER_SKILL_WEIGHT	The weight given to the skill score in suitability score calculations for the Resource Finder. When added to the role weight, the total should not exceed 100. Possible values: 0-100	25

Example: Suitability Scores for William Klein, Joseph Bank, and Barbara Getty

Table 5-5 lists three examples of scores and weights for three different resources for Project B. Project B requires application developers with C++ programming skills for six months from May through October. *Table 5-6* lists the calculations used for the availability weight and suitability score of the same three resources using the scores and weights listed in *Table 5-5*.

Table 5-5. Example suitability score adjustments

Resource	Availability Score	Skill Score	Role Score	Skill Weight	Role Weight
William Klein	79	90	100	25	25
Joseph Bank	63	80	100	25	25
Barbara Getty	100	100	0	35	25

Table 5-6. Example suitability score calculations

Resource	Availability Weight	Suitability Score
William Klein	$100 - 25 - 25 = 50$	$79 * 50\% + 90 * 25\% + 100 * 25\% = 87$
Joseph Bank	$100 - 25 - 25 = 50$	$63 * 50\% + 80 * 25\% + 100 * 25\% = 77$
Barbara Getty	$100 - 35 - 25 = 40$	$100 * 40\% + 100 * 35\% + 0 * 25\% = 75$

Calculating the Availability Score

The availability score is a numeric score representing the resource's availability for the entity in question, based on their current load and capacity. A higher score (close or equal to 100) means better availability. The availability score is the average of the availability by time period (years, quarters, months, or weeks). The availability by time period is calculated from the available resource capacity (remaining capacity) over a non-zero position forecast (available resource capacity = resource capacity – resource allocation), expressed as a percentage.

$$\text{Availability Score} = [\text{AT}(1) + \text{AT}(2) + \dots + \text{AT}(n)] / N$$

or

$$= \{ [\text{RC}(1) / \text{PF}(1)] * 100 + [\text{RC}(2) / \text{PF}(2)] * 100 + \dots + [\text{RC}(n) / \text{PF}(n)] * 100 \} / N$$

where:

AT = availability by time period = (RC / PF) * 100

RC = available resource capacity

PF = position forecast (0 < PF <= 1)

N = number of time periods

The availability by time period cannot be greater than 100% (that is, a resource cannot be available more than 100% of the time). If this calculation is greater than 100%, the availability by time period is set to 100%.



The position forecast cannot be greater than one (that is, a resource cannot be booked for more than one FTE per time period). If the position forecast is zero, the availability by time period is not used in the calculation of the availability score.

Table 5-7. Example availability score calculations

RC	PF	N	Availability by Time Period			Availability Score
.33, .25, 1	.33, .5, 1	3	(.33 / .33) * 100 = 100%	(.25 / .5) * 100 = 50%	(1 / 1) * 100 = 100%	(100% + 50% + 100%) / 3 = 83%
.33, .25, 1	0, .5, 1	3	N/A	(.25 / .5) * 100 = 50%	(1 / 1) * 100 = 100%	(50% + 100%) / 2 = 75%*

*Because the position forecast is zero in the first time period, the first time period is not included in the calculation of the availability score.

Example: Availability Score for William Klein

In the following example, William Klein is an application developer who has 75% of his time allocated in May to Project A. He is also planning to take two weeks of vacation in July.

Project B requires application developers for six months from May through October. Staffing requirements are three FTEs for May through August, tapering off to one FTE for September, and 1/2 FTE for October.

The following are William Klein's capacity, allocation, available capacity, and availability by month:

Table 5-8. William Klein's monthly availability calculations for Project B

	May	Jun	Jul	Aug	Sep	Oct
Capacity	1	1	.5	1	1	1
Allocation	.75	0	0	0	0	0
Available Capacity (RC) (Capacity - Allocation)	.25	1	.5	1	1	1
Position Forecast (PF) (0 < PF <= 1)	1	1	1	1	1	.5
Availability by Month (AT) ([RC / PF] * 100, <= 100%)	25%	100%	50%	100%	100%	100%

William Klein's availability score for Project B is:

$$(25\% + 100\% + 50\% + 100\% + 100\% + 100\%) / 6 = 79\%$$

Example: Availability Score for Joseph Bank

In the following example, Joseph Bank is an application developer who has 50% of his time allocated in May and June to Project A and 100% of his time allocated in September and October to Project C. He is planning to take two weeks of vacation in August.

Project B requires application developers for six months from May through October. Staffing requirements are three FTEs for May through August, tapering off to one FTE for September, and 1/2 FTE for October. William Klein is expected to be allocated to the work in September and October.

The following are Joseph Bank’s capacity, allocation, available capacity, and availability by month:

Table 5-9. Joseph Bank’s monthly availability calculations for Project B

	May	Jun	Jul	Aug	Sep	Oct
Capacity	1	1	1	.5	1	1
Allocation	.5	.5	0	0	1	1
Available Capacity (RC) (Capacity - Allocation)	.5	.5	1	.5	0	0
Position Forecast (PF) (0 < PF <= 1)	1	1	1	1	0	0
Availability by Month (AT) ([RC / PF] * 100, <= 100%)	50%	50%	100%	50%	N/A	N/A

Joseph Bank’s availability score for Project B is:

$$(50\% + 50\% + 100\% + 50\%) / 4 = 63\%$$

Example: Availability Score for Barbara Getty

In the following example, Barbara Getty is a Java™ developer who has no time allocated from May through October. She is not planning to take any vacation during that time.

Project B requires application developers for six months from May through October. Staffing requirements are three FTEs for May through August, tapering off to one FTE for September, and 1/2 FTE for October. William Klein is expected to be allocated to the work in September and October.

The following are Barbara Getty's capacity, allocation, available capacity, and availability by month:

Table 5-10. Barbara Getty's monthly availability calculations for Project B

	May	Jun	Jul	Aug	Sep	Oct
Capacity	1	1	1	1	1	1
Allocation	0	0	0	0	0	0
Available Capacity (RC) (Capacity - Allocation)	1	1	1	1	1	1
Position Forecast (PF) ($0 < PF \leq 1$)	1	1	1	1	0	0
Availability by Month (AT) ($[RC / PF] * 100, \leq 100\%$)	100%	100%	100%	100%	N/A	N/A

Barbara Getty's availability score for Project B is:

$$(100\% + 100\% + 100\% + 100\%) / 4 = 100\%$$

Calculating the Skill Score

The skill score is a numeric score representing the resource's suitability for the entity in question relative to the skill required. A higher score (close or equal to 100) means better suitability. Calculating the skill score depends on the specified skill level and the resource's skill level.

If $RSL > SSL$, Skill Score = $100 - (RSL - SSL) * [100 / (2 * N)]$

If $SSL > RSL$, Skill Score = $100 - (SSL - RSL) * (100 / N)$

If $RSL = SSL$, Skill Score = 100

where:

RSL = resource's skill level

SSL = specified (required) skill level

N = number of skill levels

If more than one skill is required, the score for the resource is the average of the skill scores.

Example: Skill Scores for William Klein, Joseph Bank, and Barbara Getty

Table 5-11 shows the skill score calculations for three resources. The first set of skill scores listed are for the C++ programming skill. The second set of skill scores listed are for multiple skills of C++ and DBA.

Table 5-11. Example skill score calculations (page 1 of 2)

Resource	Skill	RSL	SSL	N	Skill Score
Single Skill Requirement					
William Klein	C++	4	3	5	$100 - \{ (4 - 3) * [100 / (2 * 5)] \} = 90$
Joseph Bank	C++	2	3	5	$100 - [(3 - 2) * (100 / 5)] = 80$
Barbara Getty	C++	3	3	5	100

Table 5-11. Example skill score calculations (page 2 of 2)

Resource	Skill	RSL	SSL	N	Skill Score
Multiple Skill Requirements					
William Klein	C++	4	3	5	$\{ [100 - (4 - 3) * 100 / (2 * 5)] + 100 \} / 2 = 95$
	DBA	2	2	5	
Joseph Bank	C++	2	3	5	$\{ 100 - [(3 - 2) * (100 / 5)] + 100 - (4 - 2) * [100 / (2 * 5)] \} / 2 = 80$
	DBA	4	2	5	
Barbara Getty	C++	3	3	5	$\{ 100 + [100 - (2 - 0) * (100 / 5)] \} / 2 = 80$
	DBA	0	2	5	

Calculating the Projected Utilization

Projected utilization is how much the resource would be used if the assignment were made. If the resource is not overallocated, projected utilization is less than 100%. If the resource is overallocated, projected utilization is greater than 100%. Projected utilization is calculated by the sum of the total resource allocation and the total position forecast divided by the total resource capacity.

$$\text{Projected Utilization} = (\text{RA} + \text{PF}) / \text{RC}$$

where:

RA = resource allocation total

PF = position forecast total

RC = resource capacity total



Projected utilization is calculated in hours. The totals used must be converted to hours before projected utilization can be calculated.

Example: Projected Utilization for William Klein

In the following example, William Klein is an application developer who currently has 75% of his time allocated in May to Project A. He is also planning to take two weeks of vacation in July.

Project B requires application developers for six months from May through October. Staffing requirements are three FTEs for May through August, tapering off to one FTE for September, and 1/2 FTE for October.

William Klein's allocation and capacity are:

Table 5-12. William Klein's projected utilization calculations

	May	Jun	Jul	Aug	Sep	Oct	Total
Allocation	.75 (120 hrs)	0	0	0	0	0	.75 (120 hrs)
Capacity	1 (160 hrs)	1 (176 hrs)	.5 (96 hrs)	1 (168 hrs)	1 (168 hrs)	1 (176 hrs)	5.5 (944 hrs)
Position Forecast (≤ 1)	1 (160 hrs)	1 (176 hrs)	1 (176 hrs)	1 (168 hrs)	1 (168 hrs)	.5 (88 hrs)	5.5 (936 hrs)

William Klein's projected utilization from May through October is:

$$(120 + 936) / 944 = 119\%$$

Example: Projected Utilization for Joseph Bank

In the following example, Joseph Bank is an application developer who has 50% of his time allocated in May and June to Project A and 100% of his time allocated in September and October to Project C. He is planning to take two weeks of vacation in August.

Project B requires application developers for six months from May through October. Staffing requirements are three FTEs for May through August, tapering off to one FTE for September, and 1/2 FTE for October. William Klein is expected to be allocated to the work in September and October.

Joseph Bank's allocation and capacity are:

Table 5-13. Joseph Bank's projected utilization calculations

	May	Jun	Jul	Aug	Sep	Oct	Total
Allocation	.5 (80 hrs)	.5 (88 hrs)	0	0	1 (168 hrs)	1 (176 hrs)	3 (512 hrs)
Capacity	1 (160 hrs)	1 (176 hrs)	1 (176 hrs)	.5 (88 hrs)	1 (168 hrs)	1 (176 hrs)	5.5 (944 hrs)
Position Forecast (≤ 1)	1 (160 hrs)	1 (176 hrs)	1 (176 hrs)	1 (168 hrs)	0 (0 hrs)	0 (0 hrs)	4 (680 hrs)

Joseph Bank's projected utilization from May through October is:

$$(512 + 680) / 944 = 126\%$$

Example: Projected Utilization for Barbara Getty

In the following example, Barbara Getty is a Java developer who has no time allocated from May through October. She is not planning to take any vacation during that time.

Project B requires application developers for six months from May through October. Staffing requirements are three FTEs for May through August, tapering off to one FTE for September, and 1/2 FTE for October. William Klein is expected to be allocated to the work in September and October.

Barbara Getty's allocation and capacity are:

Table 5-14. Barbara Getty's projected utilization calculations

	May	Jun	Jul	Aug	Sep	Oct	Total
Allocation	0	0	0	0	0	0	0
Capacity	1 (160 hrs)	1 (176 hrs)	1 (176 hrs)	1 (168 hrs)	1 (168 hrs)	1 (176 hrs)	6 (1024 hrs)
Position Forecast (≤ 1)	1 (160 hrs)	1 (176 hrs)	1 (176 hrs)	1 (168 hrs)	0 (0 hrs)	0 (0 hrs)	4 (680 hrs)

Barbara Getty's projected utilization from May through October is:

$$(0 + 680) / 1024 = 66\%$$

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**

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.

Scheduled Effort is evenly distributed across working days from the **Scheduled Start** to the **Scheduled Finish**. Hours per week may differ based on regional and personal calendars (for example, holidays and personal vacations).



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 specifying 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



Req # Δ	Req Type	Description	Status	Assigned To	Priority	Created By
30017	PFM - Proposal	Web site rollout to Facilities	ITSC Review			Joseph Banks
30030	Project Issue	Losing our Oracle Apps expert QA person	Open	Joseph Banks	Critical	Joseph Banks
30150	Project Issue	Company shutdown directly impacts del...	New		Critical	Joseph Banks
30151	Project Issue	We need another cube for contractors ...	New		Normal	Joseph Banks

Showing 1 to 4 of 4 [Prev](#) [Next](#) [Maximize](#)

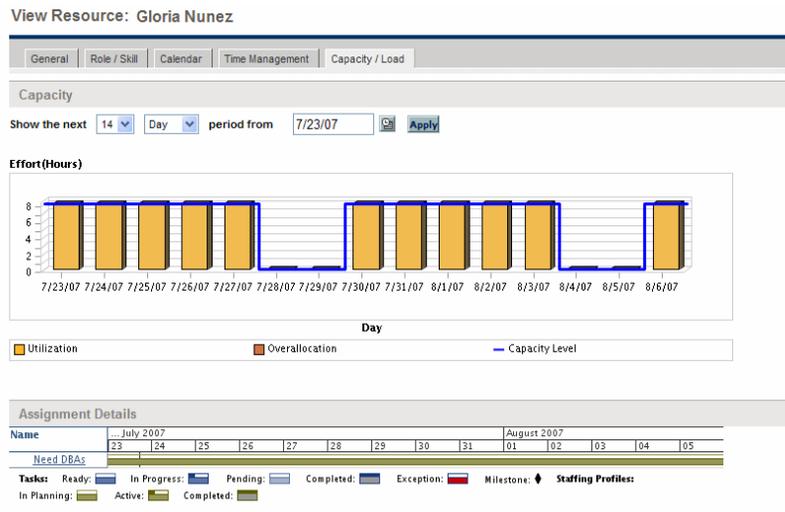
Resources with a Demand Management license can add the My Requests portlet to one of their PPM Dashboard pages, enabling them to view request work items that have been assigned to them, or that they have created.

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 **Open > 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 181 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

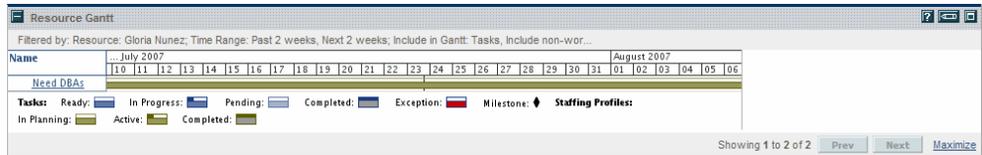
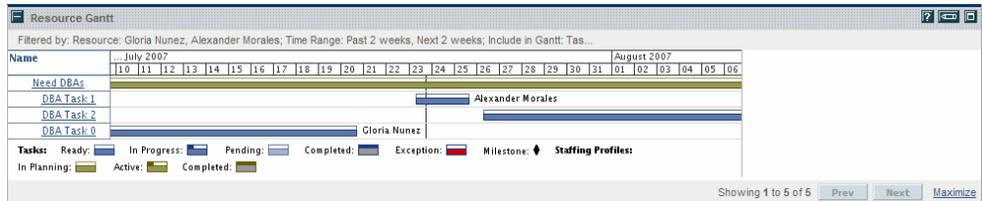


Figure 5-10. Resource Gantt portlet, non-workload tasks



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



Table 5-15. Analyze Assignment Load portlet legend

Name	Description
Utilization	The amount of effort that has been allocated to the selected resources during the time period.
Overalllocation	The amount of effort that exceeds the capacity level of the selected resources.
Capacity Level	The maximum amount of effort that can be allocated to the selected resources during the time period.

The Analyze Assignment Load portlet can be filtered according to the parameters described in [Table 5-16](#).

Table 5-16. Analyze Assignment Load portlet - parameters (page 1 of 2)

Field Name	Description
Preferences	
Analyze Capacity from	<p>A choice of multi-select auto-complete fields that selects the sets of resources to display in the Analyze Assignment Load page.</p> <p>Possible choices: Organization Units, Resource Pool, Resources Managed By, Resource Name, Resources on Project</p> <p>If you select Resource Pool, two additional options are available:</p> <ul style="list-style-type: none"> • Include children resource pools. Include resources from children resource pools of the selected resource pools. • Limit capacity against selected resource pools. Include the capacity and scheduled effort (from staffing profiles) of resources for the selected resource pools only. If a resource belongs to more than one resource pool, the capacity and scheduled effort for only the selected resource pools are used. Scheduled effort entered in a work plan or request (effort not associated with a resource pool) is not limited.
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	<p>Select to display Scheduled Effort, Actual Effort, or Scheduled and Actual Effort in the Analyze Assignment Load page.</p> <p>If you are analyzing capacity from a resource pool and have selected Limit capacity against selected resource pools, only Scheduled Effort can be selected.</p>

Table 5-16. Analyze Assignment Load portlet - parameters (page 2 of 2)

Field Name	Description
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.



If a staffing profile is completed, future forecast and assignments (those past the finish date of the staffing profile) can be cleared and will not display in the portlet. See [Clearing Future Forecast and Assignments on page 89](#) for more information.

If large amounts of data are supplied to the portlet, there may be performance problems. Therefore, a threshold for this portlet can be specified in the `server.conf` file and a default value is provided for optimal performance.

- `AAL_PORTLET_MAX_RESOURCES`: the maximum number of total resources. The default value is 300.

Refer to the *Installation and Administration Guide* for more information about editing the `server.conf` file.

When the threshold is exceeded, the portlet does not display. Instead, a message containing the threshold value and current value that exceeds the threshold appear. To make the portlet display, you can edit the preferences of the portlet so that the threshold is no longer exceeded. HP does not recommend that you increase the threshold value as this may cause performance problems.

If the amount of data you need to analyze exceeds the threshold, you can export the data to Microsoft Excel. To export Analyze Assignment Load portlet data to Microsoft Excel, do the following:

1. Select **Open > Resource Management > Data Exports > Analyze Assignment Load**.

2. Set the filter criteria for export.

An additional field is included for the filter criteria: Include Detailed Data. Select this checkbox if you want to get a breakdown of total resource capacity and workload (data displayed in the Analyze Assignment Load Breakdown table).

3. Click **Export To Excel**.

The date when the snapshot was taken is included in the export.



The data may not contain decimal places. Therefore, numbers such as 2.47 may display as 3.

Resource Load Breakdown Table

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

Figure 5-12. Resource Breakdown table

Resource Name	8/20/06	8/27/06	9/3/06	9/10/06	9/17/06	9/24/06	10/1/06	10/8/06
	Sched	Sched	Sched	Sched	Sched	Sched	Sched	S
John Groom								
Total Capacity	40	40	32	40	40	40	40	
Total Assignments	0	8	32	40	40	40	0	
Available Capacity	40	32	0	0	0	0	40	
Gloria Nunez								
Total Capacity	40	40	32	40	40	40	40	
Total Assignments	40	40	32	40	40	40	52	
Available Capacity	0	0	0	0	0	0	(12)	
Holly Haywood								
Total Capacity	40	40	32	40	40	40	40	
Total Assignments	40	40	32	40	40	40	40	
Available Capacity	0	0	0	0	0	0	0	
Barbara Getty								
Total Capacity	40	40	32	40	40	40	40	
Total Assignments	0	0	0	0	0	0	0	

The Resource Load Breakdown table can be filtered to show different data according to the parameters described in [Viewing Resource Load on page 162](#). Column and row descriptions are also listed in this section.

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 Load Breakdown table can be exported to 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](#).

A Typical Usage

The following information is based on typical usage of PPM Center and HP Resource Management. HP cannot warrant that you will have the same or similar experience.

Table A-1 lists entities with an amount for its typical usage, amounts that are considered complex and might impact performance, where that performance impact might occur, and recommendations or comments about complex usage.

Table A-1. HP Resource Management Typical Usage

	Typical	Complex	Performance Impact	Recommendations/Comments
Duration of a Staffing Profile	<= 3 years	> 3 years	View staffing profile when allocation entered in weeks	Enter allocation for a staffing profile in months, quarters, or years. Use the Forecast Planning page for resource planning.
Number of Positions and Resources in a Staffing Profile	100	> 200	View staffing profile when allocation entered in weeks	Enter allocation for a staffing profile in months, quarters, or years. Use the Forecast Planning page for resource planning.
Number of Projects to which a Single Resource is Assigned	<= 10	> 10		Plan for unknown resources using promises. Use the Resource Allocation Management page to manage individual resources across multiple projects.
Resources in a Resource Pool	<= 300	> 300	Manage Pool Capacity page, View Forecasted Demand page, View Resource Load page	

Table A-1. HP Resource Management Typical Usage

	Typical	Complex	Performance Impact	Recommendations/Comments
Total Resources in the Analyze Assignment Load Portlet	<= 300	> 300	Analyze Assignment Load portlet	The maximum number of total resources in the Analyze Assignment Load portlet is set by the AAL_PORTLET_MAX_RESOURCES parameter.
Total Resources in the Analyze Resource Pools Portlet	<= 300	> 300	Analyze Resource Pools portlet	The maximum number of total resources in the Analyze Resource Pools portlet is set by the ARP_MAX_RESOURCES parameter.
Total Resource Pools in the Analyze Resource Pools Portlet	<= 30	> 30	Analyze Resource Pools portlet	The maximum number of total resource pools in the Analyze Resource Pools portlet is set by the ARP_MAX_RESOURCE_POOLS parameter.

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