



Mercury IT Governance Center™
Mercury Resource Management™
User's Guide
Version: 6.0

MERCURY™



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Chapter 1 Introduction

In This Chapter:

- *About This Document*
 - *Who Should Read This Document*
 - *Related Documents*
 - *Overview of Resource Management*
-

About This Document

This guide describes how to navigate and use Mercury Resource Management™, which is part of Mercury IT Governance Center™. This includes the following activities:

- Modeling your organization
- Setting up resources and calendars
- Using staffing profiles and resource pools for capacity planning
- Visualizing resource load and capacity across the system for operational planning

Each chapter covers a specific topic on navigation or usage:

- [Chapter 1, *Introduction*, on page 11](#)

Includes an overview of Mercury Resource Management and details the document's intended audience and related guides.

- [Chapter 2, *Before Starting*, on page 15](#)

Describes the setup work that should be completed before using Resource Management.

- [Chapter 3, *Modeling Your Organization*, on page 29](#)

Explains how to model your organization at the individual and group level using Resource Management.

- [Chapter 4, *Using Resource Management for Capacity Planning*, on page 51](#)

Describes how to use Resource Management entities such as resource pools and staffing profiles to model and plan for resource allocations.

- [Chapter 5, *Using Resource Management for Operational Planning*, on page 91](#)

Explains how to use Resource Management visualizations to assess current resource usage and optimize operational capacity.

- [Appendix A: Resource Management Portlets on page 121](#)
Lists the reports delivered as part of Mercury Resource Management.
- [Appendix B: Reports by Category on page 123](#)
Defines the reports delivered as part of Mercury IT Governance Center™.

Who Should Read This Document

The intended audience for this document include:

- Business or technical users who configure and maintain resources or an organization model using Resource Management
- Business users responsible for creating and managing projects or requests using Mercury IT Governance Center
- Business users responsible for forecasting capacity and resource allocations to projects and programs
- Managers responsible for reporting on projects or demand

Related Documents

Related documents for this book are:

- *Guide to Documentation*
- *Key Concepts*
- *Getting Started*
- *Mercury Demand Management User's Guide*
- *Mercury Change Management User's Guide*
- *Mercury Project Management User's Guide*
- *Mercury Program Management User's Guide*
- *Mercury Portfolio Management User's Guide*
- *Mercury Time Management User's Guide*

- *Security Model Guide and Reference*
- *Configuring the Standard Interface*
- *Mercury Time Management Configuration Guide*

For More Information

For information about these documents and how to access them, see the *Guide to Documentation*.

Overview of Resource Management

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

- To support current demand and project planning, Resource Management delivers a set of visualizations and related tools that managers and individual resources can use to communicate each others' needs and capabilities. These include work calendars, standard planning fields on tasks and requests, and resource load and capacity histograms.
- To support future demand and project planning, resource forecasting capability is achieved with staffing profiles and resource pools. High-level visualizations help program and resource managers with assessing project feasibility and timing, and with making advance staffing decisions and allocations.

Chapter 2 Before Starting

In This Chapter:

- *Overview of Before Starting*
 - *Setting Up Resource Management Validations*
 - *Setting Up Skills*
 - *Creating a New Skill*
 - *Modifying Existing Skills*
 - *Deleting Skills*
 - *Setting Up a Regional Calendar*
 - *Specifying the System Default Regional Calendar*
 - *Setting Up Regions*
 - *Setting Up Request Work Item Fields*
-

Overview of Before Starting

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

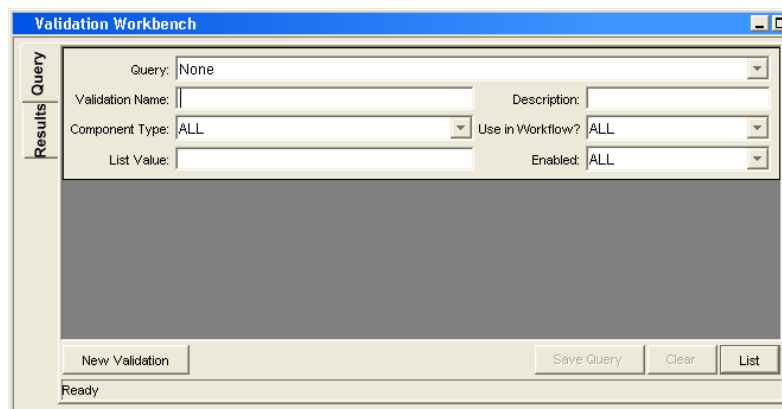
Setting Up Resource Management Validations

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

To modify the values for these field validations:

1. Log on to Mercury IT Governance Center and open the Workbench.
2. From the shortcut bar, select **Configuration > Validations**.

The Validation Workbench window opens.



3. Type “rsc” into the Validation Name field and click **List**.

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

The screenshot shows the 'Validation Workbench' window with a table of validation queries. The table has three columns: 'Validation Name', 'Description', and 'C'. The 'C' column contains dropdown menus with options like 'Drop', 'Auto', and 'Refresh'. Below the table are buttons for 'New', 'Open', 'Copy', 'Delete', and 'Refresh'. At the bottom, it says '47 Validation Records are loaded.'

Validation Name	Description	C
RSC - Capacity Display Periods	Used for resource capacity chart	Drop
RSC - Capacity Period Numbers	Used for resource capacity chart	Drop
RSC - Finish Periods of type Fiscal Quarter	RSC - Finish Periods of type Fiscal Quarter	Auto
RSC - Location		Drop
RSC - Location - Autocomp	List of locations in Autocomplete	Auto
RSC - Org Unit ID - Enabled	List of Organization Unit IDs	Auto
RSC - Org Unit Name - All	List of Organization Unit Names	Auto
RSC - Org Unit Potential Parents (with Region)	Returns a list of org units that are valid parents fo...	Auto
RSC - Org Unit Potential Parents (with Region) fo...	Returns a list of org units that are valid parents fo...	Auto
RSC - Org Unit Sort By	RSC - Org Unit Sort By	Drop
RSC - Org Unit Type	RSC - Org Unit Type	Drop
RSC - Org Unit Type - Autocomp	List of Org Unit Types in Autocomplete	Auto
RSC - Org Units - Enabled (non-seeded)	RSC - Organization Units - Enabled	Auto

4. Modify the following validations to conform to your business model:

Table 2-1. Important Resource Management validations

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

5. 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 Up Skills

Resource Management comes with a single “Unspecified” skill, which all resources have in the absence of any defined skills. To make use of resource skill tracking, you need to add new skills and modify them as you see fit.



Note

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

Creating a New Skill

To add a new skill:

1. Log on to Mercury IT Governance Center.
2. Select **Resource > Skills > Create a Skill** from the menu bar.

The Create a New Skill page opens.

Create a New Skill

Skill Name:

Skill Category:

Description:

Enabled: Yes No

Regional Cost Rate: Enterprise /hour

Create Cancel

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



Note

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

4. Click **Create**.

The skill is created and the View Skill page opens.

View Skill: Document Manager

Modify Skill

Skill Name: Document Manager **Regional Cost Rate:** Enterprise - \$60 /hour

Skill Category: Development

Description: Manages all aspects of documentation

Enabled: Yes

Related Actions

View Resources with this Skill

View Upcoming Use of this Skill

View Historical Use of this Skill

Done

You can now add this skill to any resource.

Modifying Existing Skills

To modify an existing skill:

1. Log on to Mercury IT Governance Center.
2. Select **Resource > Skills > Modify Skills** from the menu bar.

The Modify Skills search page opens.

Modify Skills

Search for Skill

Please use the search criteria below to find the Skills you wish to modify.

Skill Name: **Enabled:** All


Skill Category:

Maximum Results Per Page:

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

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

Modify Skills

 Export Data to Excel

Select Skill to Modify				Showing 1 to 6 of 6
Skill Name	Description	Skill Category	Enabled	
<input type="checkbox"/> IT Coding	IT In-House Program Support	Technical	Y	
<input type="checkbox"/> Product Architect	Product Architect	Development	Y	
<input type="checkbox"/> Product Integration Tester	Product integration tester	Development	Y	
<input type="checkbox"/> Product Unit Testing	Product unit testing	Development	Y	
<input type="checkbox"/> RandD Coding	Product Coding	Development	Y	
<input type="checkbox"/> Technical Writer	Write product documents.	Development	Y	

Showing 1 to 6 of 6

Search for Skill

Please use the search criteria below to find the Skills you wish to modify.

Skill Name: Enabled: All

Skill Category:

*Maximum Results Per Page:

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

Modify Skill: Technical Writer

Skill Name:

Skill Category: Development

Description:

Enabled: Yes No

Regional Cost Rate: Enterprise /hour

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

Deleting Skills

To delete a skill:

1. Log on to Mercury IT Governance Center.
2. Select **Resource > Skills > Modify a Skill** from the menu bar.

The Modify Skills search page opens.

Modify Skills

Search for Skill

Please use the search criteria below to find the Skills you wish to modify.

Skill Name: **Enabled:** All

Skill Category:

Maximum Results Per Page:

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

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

Modify Skills

Select Skill to Modify Showing 1 to 6 of 6

Skill Name	Description	Skill Category	Enabled
<input type="checkbox"/> IT Coding	IT In-House Program Support	Technical	Y
<input type="checkbox"/> Product Architect	Product Architect	Development	Y
<input type="checkbox"/> Product Integration Tester	Product integration tester	Development	Y
<input type="checkbox"/> Product Unit Testing	Product unit testing	Development	Y
<input type="checkbox"/> RandD Coding	Product Coding	Development	Y
<input type="checkbox"/> Technical Writer	Write product documents.	Development	Y

Showing 1 to 6 of 6

Search for Skill

Please use the search criteria below to find the Skills you wish to modify.

Skill Name: **Enabled:** All

Skill Category:

Maximum Results Per Page:

4. Select the checkbox next to a skill or skills and click **Delete**.

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

Setting Up 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 Mercury IT Governance Center.
2. Select **Administration > Regional Calendars > View Regional Calendars** from the menu bar.

The Modify Regional Calendars page opens. You can expand or narrow down the list of regional calendars by entering search criteria into the filter fields and clicking **Search**.

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

The Modify Regional Calendar <Name> page opens.

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

You can also select all the Mondays in a month, for example, by selecting the day's column header.

5. Click the the Non-Working day radio button to mark those days as non-working.

Optionally, select a Reason and enter 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 Mercury IT Governance Center. This setting can be changed if needed.

To set the System Default Regional Calendar:

1. Log on to Mercury IT Governance Center.
2. Select **Administration > Regional Calendars > Set System Default Region** from the menu bar.

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

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

Setting Up Regions

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

Setting Up Request Work Item Fields

If you have licenses for Demand Management, and you wish to include requests as work items to be tracked using Resource Management, include work item fields into your request types. Work item fields include the following (for a list of all request work item fields, see [Table 5-1 on page 93](#)):

- 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.

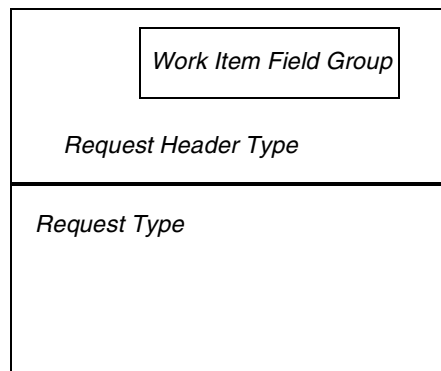


Figure 2-1. Work item field group in a request type



Note

To avoid associating work item fields with a request you don't want to track, use a 1:1 request header type to request type mapping.



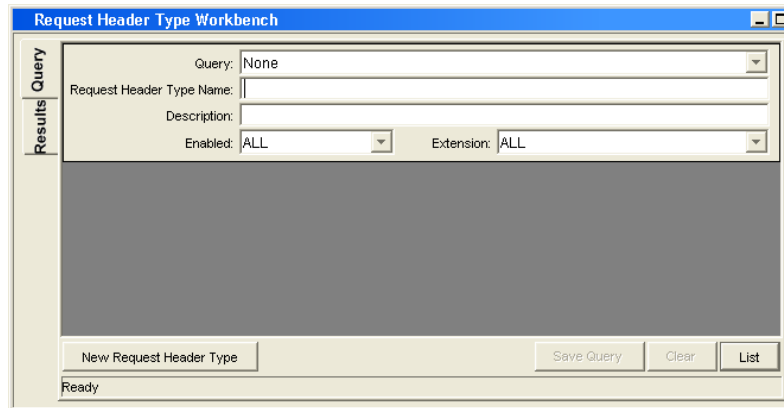
Note

When Field Groups are associated with existing request types (through the request header type definition), tables in the Mercury IT Governance Center database are updated to handle this new configuration. Because of the scope of database changes, you should re-run the Database Statistics on your Database. Instructions for this are included in the *System Administration Guide and Reference*. Contact your System Administrator for help with this procedure.

To associate work item fields with a request type:

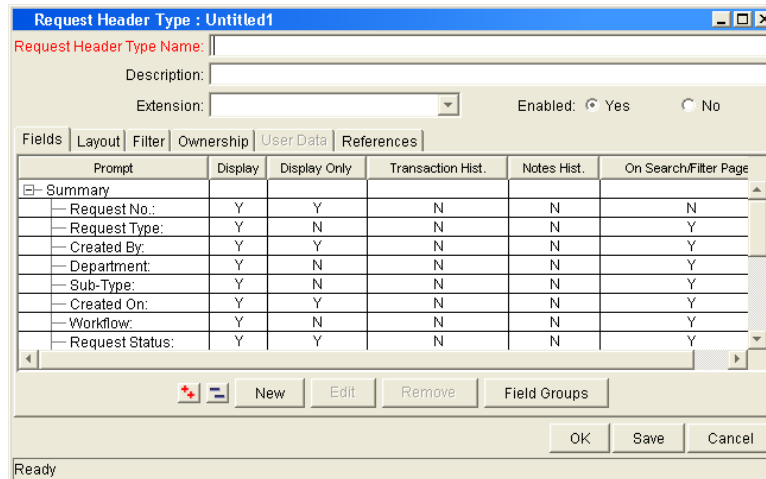
1. Log on to Mercury IT Governance Center and open the Workbench.
2. From the shortcut bar, select **Demand Mgmt > Request Header Types**.

The Request Header Type Workbench opens.



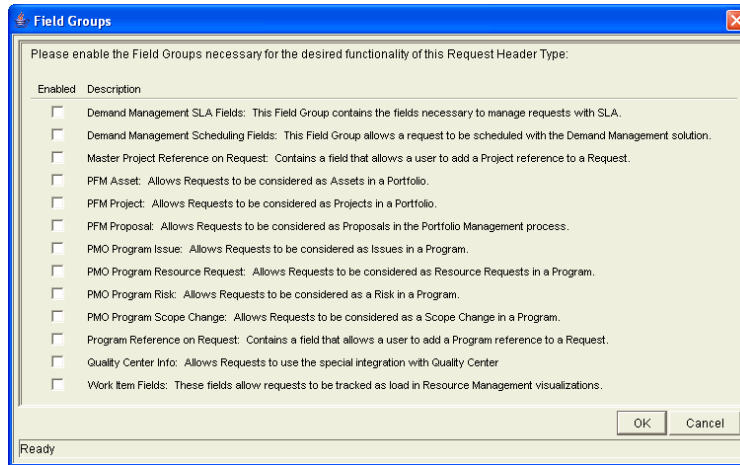
3. Click **New Request Header Type**.

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



4. Click **Field Groups**.

The Field Groups window opens.



Note

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

5. 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.

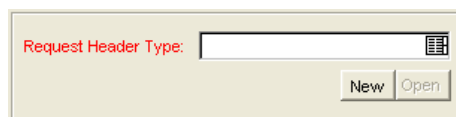
6. Enter any other required or optional information.

7. (Optional) Modify other existing request header type fields or create new ones as you see fit. See the *Mercury Demand Management: Configuring a Request Resolution System* document for more detailed information on modifying request header type fields.

8. Save the request header type.

9. Click the Request Types screen and open the request type in which you wish to include work item fields.

10. In the Request Header Type field, specify the request header type containing the work item fields.



11. (Optional) Modify the request type as you see fit, including setting field logic and security. See the *Mercury Demand Management: Configuring a Request Resolution System* document for more detailed information on modifying request type fields.

12. Save the request type.

The request type now has work item fields associated with it and can be tracked using Resource Management.



Note

Certain request work item fields are interdependent, meaning one field might be updated when another field's value is changed. Demand Management field-level security allows you to make request fields invisible to certain users or sets of users. Resource Management for requests may not work correctly if you make an interdependent request work item field invisible to a user. Any user who will be making use of request work item fields must have at least View access to all of them. Edit access to all work item fields is not necessary unless the user will be changing work item field values.

Chapter

3

Modeling Your Organization

In This Chapter:

- *Overview of Modeling Your Organization*
 - *Setting Up a Resource*
 - *Setting Resource Attributes*
 - *Setting Up the Resource Calendar*
 - *Resource Security*
 - *Modeling Organization Units*
 - *Creating an Organization Unit*
 - *Building the Organization Model*
 - *Linking Organization Units to Security Groups*
 - *Converting Organization Unit Type*
-

Overview of Modeling Your Organization

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

Setting Up a Resource

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

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

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

Table 3-1. Key resource attributes

Attribute	Utilization
Cost Rate	<p>Used to calculate project and task costs. Example: $\text{Cost Rate} * \text{Hours Worked} = \text{Task Actual Cost}$</p> <p>If the cost rate for a resource is not set, the cost rate for the resource's primary skill is used.</p> <p>See the <i>Mercury Financial Management User's Guide</i> for more detailed information.</p>
Capacity	<p>Used to calculate resource capacity for work items.</p> <p>See Visualizing Assignments on page 114 for more detailed information.</p>
Skills	<p>Used in resource booking and to build staffing profiles and resource pools.</p> <p>See Using Resource Management for Capacity Planning on page 51 for more detailed information.</p>
Region	<p>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.</p> <p>For more information on regions and regional calendars, see Setting Up a Regional Calendar on page 22.</p> <p>For more information on currency settings, see the <i>Mercury Financial Management User's Guide</i>.</p>

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



Note

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

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

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.

Setting Resource Attributes

General resource attributes are set in the standard interface.

To configure attributes for a resource:

1. Log on to Mercury IT Governance Center.
2. Select **Resource > Resources > Modify Resources** from the menu bar.

The Modify Resources search page opens.

Modify Resources

Search for Resources

Please use the search criteria below to find the Resources you wish to modify.

Username: Skill: Primary Skill Only

First Name: Last Name:

Department: Location:

Manager: Category:

Organization Unit: Title:

Minimum Capacity: % Enabled:

*Sort By: Ascending Descending *Maximum Results Per Page:

Search

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

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

Modify Resources

Export Data to Excel

Select Resources to Modify					
Username	First Name	Last Name	Category	Enabled	Primary Skill, Secondary Skills
<input type="checkbox"/> belindanolan	Belinda	Nolan		Yes	
<input type="checkbox"/> bettynolan	Betty	Nolan		Yes	
<input type="checkbox"/> billnolan	Bill	Nolan		Yes	
<input type="checkbox"/> bobnolan	Bob	Nolan		Yes	
<input type="checkbox"/> bradnolan	Brad	Nolan		Yes	

Showing 1 to 5 of 5

Showing 1 to 5 of 5

Search for Resources

Please use the search criteria below to find the Resources you wish to modify.

Username: Skill: Primary Skill Only

First Name: Last Name:

Department: Location:

Manager: Category:

Organization Unit: Title:

Minimum Capacity: % Enabled:

Sort By: Ascending Descending Maximum Results Per Page:

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

Modify Resource: Bob Nolan

Full Name: Bob Nolan Start Date: 10/26/04 End Date:

First Name: Cost Rate: /hour

Last Name: Capacity: 100 % for workload assignments

Title: Department:

Email: Location:

Phone Number: Category:

Direct Manager:

Resource will:

Inherit Region: Enterprise, from Org Unit: Unspecified

Use this Region:

Organization Information		
Org Unit Name	Type	Manager
This Resource does not currently belong to any Organization.		

Skill Profile		
Skill	Primary	Proficiency
There are currently no Skills specified.		

Related Actions

[Modify User Information for this Resource \(Workbench\)](#)

[View Organization Model](#)

[Modify Time Management Settings \(Workbench\)](#)

[Modify Calendar for this Resource](#)

Add Skill: Level 3

5. Fill in any desired resource attributes.



Note

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

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

To add a skill:

- a. Select one from the Add Skill auto-complete list.
- b. Select a proficiency level from the drop-down list.
- c. Click **Add**. The skill will be associated with the resource upon save.

To add more skills, repeat as necessary.

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

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



Note

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

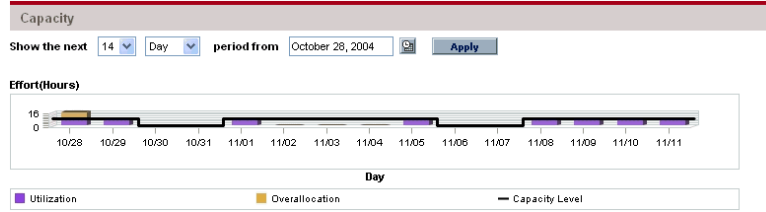
View Resource: Tina Wilcox

Modify Resource
Done

Full Name: Tina Wilcox	Start Date: 10/26/04	End Date:
First Name: Tina	Cost Rate: \$65 /hour	
Last Name: Wilcox	Capacity: 100 % for workload assignments (40 hours/week)	
Title:	Department:	
Email: tinawilcox@company.com	Location:	
Phone Number: 650 555 8885	Category:	
Direct Manager:		
Resource will:		
Inherit Region: Enterprise, from Org Unit: Primary Info Systems		

Organization Information		Skill Profile	
Org Unit Name	Type	Skill	Proficiency
Tech Facilitators		DBA	Level 4
Primary Info Sy...	John Smith	Document Manager	Level 3
Primary Organization Unit is shown in Bold		External Systems Expert (Primary Skill)	Level 5 (High)
		Java Consultant	Level 2

Related Actions
[View Organization Model](#)
[View Calendar for this Resource](#)



Assignment Details															
Name	October 2004				November 2004										
	28	29	30	31	01	02	03	04	05	06	07	08	09	10	11
Launch Window Confirmation															
Maintain Corporate Accounts															
Code Complete				♦											
Clear Previous Project Cache															

Done

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.

To set a resource's calendar:

1. Open the resource's calendar by clicking the **Modify Calendar** for this Resource link near the bottom of the **Modify Resource** page.
2. Select a day or range of days by using **Shift+click** or **Ctrl+click**.
3. Choose the **Nonworking day** radio button to mark those days as non-working.

Optionally, select a Reason and enter a Description.

4. Click **Save**.

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



Note

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

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 their own resource information.
View all resources	The user can only view information for all resources in the system.
Edit only resources that I manage	The user can view and edit information for resources that list them as Direct Manager.
Edit all resources	The user can view and edit information for all resources in the system.

Cost access grants also come into play when a user is viewing resource data: for example, the Cost Rate can be sensitive information. [Table 3-3](#) discusses the interaction of Cost access grants with resource viewing.

Table 3-3. Cost access grants and resource information

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

Access grants are linked to a user 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 an organization model with two large independent organization units, each made up of child org units.

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

View Organization Model

Show me: All Organization Units Only Enabled Organization Units

Organization Unit Name	Type	Manager	Department	Location	Enabled	Members Total (Direct)
<input type="checkbox"/> Dev		ksmith			Yes	3 (3)
<input checked="" type="checkbox"/> Primary Info Systems		johnsmith			Yes	24 (24)
<input checked="" type="checkbox"/> Information Engineers		martingreenbaum			Yes	11 (5)
<input type="checkbox"/> Operations		billholan			Yes	5 (5)
<input type="checkbox"/> Tech Facilitators		thomaswilcox			Yes	5 (5)

Figure 3-1. Sample organization model

There are two kinds of organization units:

- **Primary.** Resources can only belong to one primary organization unit. If set to inherit their region setting from their parent organization unit, a resource will inherit their primary organization unit’s region. Only primary organization units can be linked to resource pools (see *Planning Capacity with Resource Pools* on page 52 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 48 for more information.

Organization units can have budgets, staffing profiles, and resource pools associated with them, making it easy to run comparisons. *Figure 3-2* depicts the Budget to Budget Comparison portlet comparing the budget for an entire IT organization unit with two project budgets owned by its members. We can see that during almost every month, the combined budgets for these projects exceeds the organization unit’s by a wide margin.

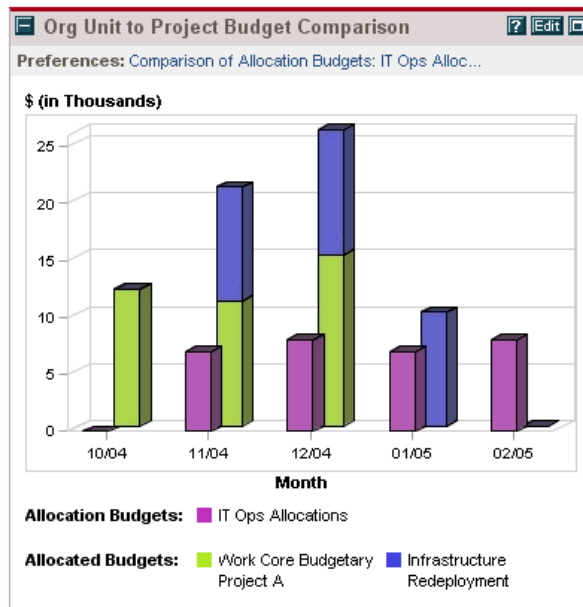
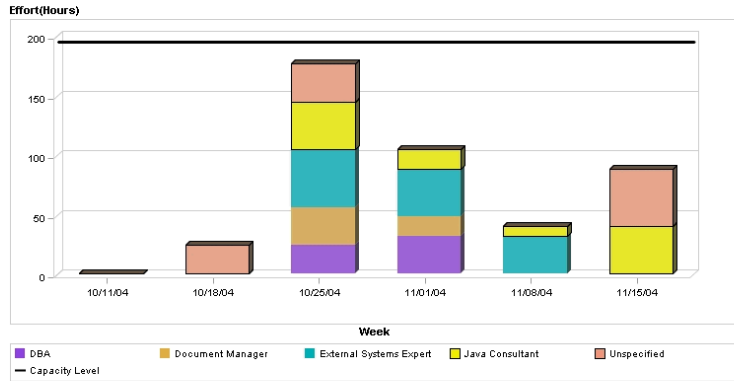


Figure 3-2. Organization unit budget compared to two project budgets

You can also show the assignment load for all resources in an organization unit with the Analyze Assignment Load page. [Figure 3-3](#) shows the Analyze Assignment Load page for an organization unit whose members are overbooked for one week and underutilized for several more. The total capacity for the organization unit is calculated from each resource's calendar and workload capacity.

Analyze Assignment Load

Showing capacity from Organization Units: Operations. Include Assignments on: Tasks. Total Assignment Values for: Scheduled Effort. Group By: Skills. Period Type Week from October 11, 2004 to November 21, 2004.



This chart compares assignments to capacity for a set of resources. Capacity is based on resource calendars and workload capacities. Only workload assignments are included.

View Resource Breakdown

Filter By Apply

Analyze Capacity from:		Include Assignments on:	
<input checked="" type="radio"/> Organization Units:	Operations	<input checked="" type="checkbox"/> Tasks	
<input type="radio"/> Resources Managed By:		<input type="checkbox"/> Requests	
<input type="radio"/> Resource Name:		<input type="checkbox"/> Staffing Profile Lines	
<input type="radio"/> Resources on Project:		Assignments with Workload Category:	
Resources with primary Skill:		Total Assignment Values for:	
		<input checked="" type="radio"/> Scheduled Effort	
		<input type="radio"/> Scheduled and Actual Effort	

Time Period

Period: Week

Display: 2 past periods

Display: 3 future periods

Arrange Data

Group By: Skills Apply

Figure 3-3. Analyze Assignment Load page

Creating an Organization Unit

To create an organization unit:

1. Log on to Mercury IT Governance Center.
2. Select **Resource > Organization Model > Create an Org Unit** from the menu bar.

The Create a New Organization Unit page opens.

Create a New Organization Unit

Name:

Department:

Type:

Manager:

Location:

Budget:

This Organization Unit is a:

Primary Organization Unit

Matrix Organization Unit

Parent Org Unit:

Inherit Region from Parent: Enterprise

Use this Region:

Enabled: Yes No

Direct Members		
Username	Full Name	Primary Org Unit
There are currently no Direct Members.		
<input type="button" value="Check All"/>	<input type="button" value="Clear All"/>	<input type="button" value="Remove"/>

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. Fill in the organization unit Name and any other desired information.
 - a. If necessary, select a Parent Org Unit.
 - b. Determine whether to Inherit Region from Parent or select from the Use this Region field for the organization unit.
 - c. From the This Organization Unit is a field, select **Primary** or **Matrix**.
4. Add users to the organization unit by selecting a user from the Resource field and clicking **Add**.

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

Create a New Organization Unit

Name:

Department:

Type:

Manager:

Location:

Budget:

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"/> martingre...	Martin Greenbaum	Primary I...
<input type="checkbox"/> mortongre...	Morton Greenbaum	Primary I...
<input type="checkbox"/> moegreenbaum	Moe Greenbaum	Primary I...
<input type="checkbox"/> mindygree...	Mindy Greenbaum	Primary I...
<input type="checkbox"/> marthagre...	Martha Greenbaum	Primary I...

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.		

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

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

View Organization Unit: Information Engineers (Matrix Organization Unit)

Name: Information Engineers **Parent Org Unit:** Primary Info Systems

Department: **Enabled:** Yes

Type: **Note:** This is a Matrix Organization Unit.

Manager: Greenbaum, Martin

Location:

Budget:

Direct Members		
Username	Full Name	Primary Org Unit
marthagre...	Martha Greenbaum	Primary I...
martingre...	Martin Greenbaum	Primary I...
mindygree...	Mindy Greenbaum	Primary I...
moegreenbaum	Moe Greenbaum	Primary I...
mortongre...	Morton Greenbaum	Primary I...

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 Assignments for this Organization Unit](#)

[View Staffing Profiles for this Organization Unit](#)

Building the Organization Model

The organization model is a hierarchy of organization units. [Figure 3-4](#) illustrates the terms used by Resource Management when defining the organization model.

<i>Parent Org Unit</i>	<input type="checkbox"/> Primary Info Systems	johnsmith
	<input checked="" type="checkbox"/> Information Engineers	martingreenbaum
<i>Child Org Units</i>	<input type="checkbox"/> Operations	billnolan
	<input type="checkbox"/> Tech Facilitators	thomaswilcox

Figure 3-4. Organization model hierarchy terms

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.

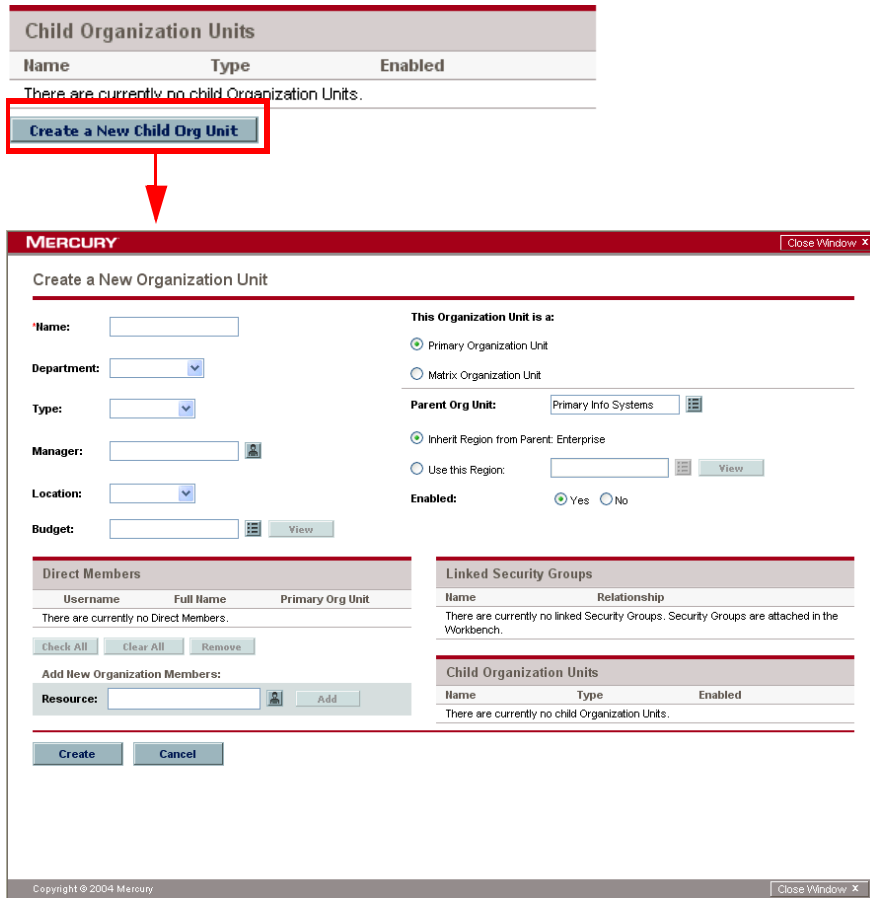
Modify Organization Unit: Operations (Primary Organization Unit)

Name: **Parent Org Unit:**

Department: Inherit Region from Parent:

Type: Use this Region:

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



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



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

1. Log on to Mercury IT Governance Center.
2. Search for the organization unit by selecting **Resource > Organization Model > Modify Org Units** from the menu bar.
3. Click the name of the organization unit you wish to modify.

The View Organization Unit page opens.

View Organization Unit: Information Engineers (Matrix Organization Unit)

Modify Org Unit **Done**

Name: Information Engineers **Parent Org Unit:** Primary Info Systems
Department: **Enabled:** Yes
Type: Note: This is a Matrix Organization Unit.
Manager: Greenbaum, Martin
Location:
Budget:

Direct Members		
Username	Full Name	Primary Org Unit
marthagre...	Martha Greenbaum	Primary I...
martingre...	Martin Greenbaum	Primary I...
mindygree...	Mindy Greenbaum	Primary I...
moeegreenbaum	Moe Greenbaum	Primary I...
mortongre...	Morton Greenbaum	Primary I...

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 Assignments for this Organization Unit](#)
[View Staffing Profiles for this Organization Unit](#)

Done

4. Click **Modify Org Unit**.

The Modify Organization Unit page opens.

Modify Organization Unit: Information Engineers (Matrix Organization Unit)

View Org Unit **Save** **Cancel**

Name: **Parent Org Unit:**

Department: **Change to a Primary Organization Unit:** **Change**

Type: **Enabled:** Yes No

Manager:

Location:

Budget: **View**

Direct Members		
Username	Full Name	Primary Org Unit
<input type="checkbox"/> marthagre...	Martha Greenbaum	Primary I...
<input type="checkbox"/> martingre...	Martin Greenbaum	Primary I...
<input type="checkbox"/> mindygree...	Mindy Greenbaum	Primary I...
<input type="checkbox"/> moegreenbaum	Moe Greenbaum	Primary I...
<input type="checkbox"/> mortongre...	Morton Greenbaum	Primary I...

Check All **Clear All** **Remove**

Add New Organization Members:
Resource: **Add**

Save **Cancel**

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
Architecture Maintenance		Yes

Create a New Child Org Unit

Linking Organization Units to Security Groups

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

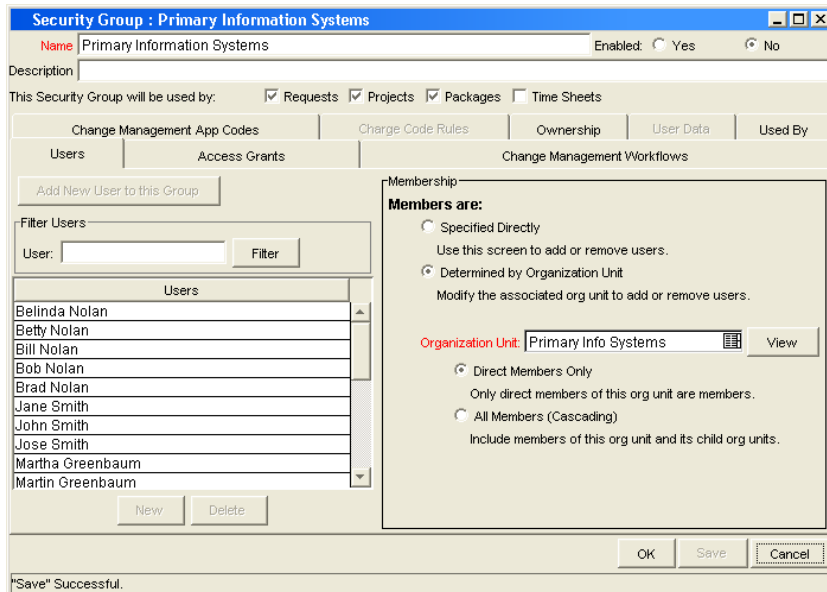


Figure 3-5. Security group membership determined by organization unit

With Resource Management, security group membership can be determined in the following ways:

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

Note

When a security group's members are determined by an organization unit, the organization unit's member list overwrites that of the security group.

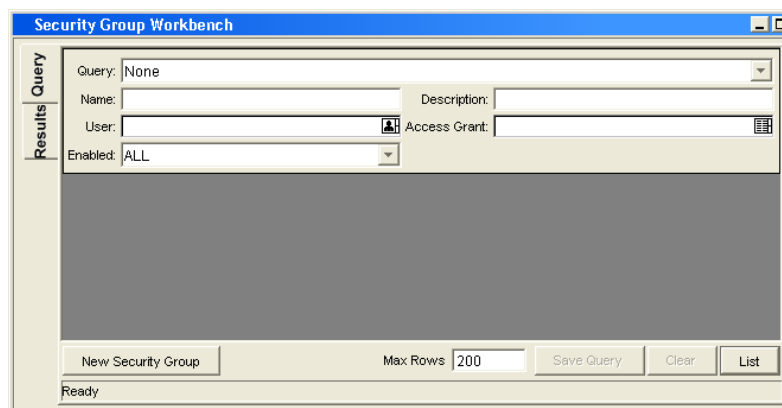
If a security group's members are determined by its organization unit, an additional level of control is added:

- **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. Open the Workbench.
2. From the shortcut bar, select **Sys Admin > Security Groups**.

The Security Group Workbench opens.



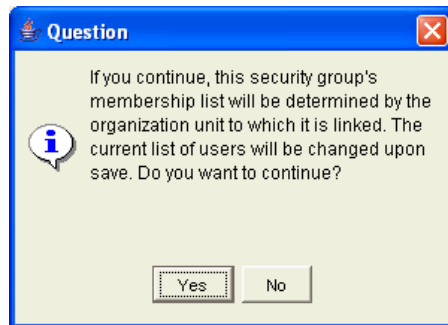
3. Create a new security group or search for and open an existing one.

The Security Group window opens.

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

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

5. Click **Yes** to continue.



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

6. Select an organization unit to be linked to the security group.
7. Specify either Direct Members Only or All Members (Cascading) for the security group's member list.
8. Click **Save**.

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

Converting Organization Unit Type

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

- **Primary to Matrix.** All of the Resources in the organization unit will now belong to the “Unspecified” organization unit.
 - If they were set to inherit their region from their organization unit, they will now inherit the region belonging to the “Unspecified” organization unit.
 - If there was a resource pool associated with the organization unit, it will no longer be linked.
- **Matrix to Primary.** All of the resource in the organization unit will be pulled out of their existing primary organization units and placed in the current one. If they were set to inherit their region from their former primary organization unit, they will instead inherit their region from the current organization unit.

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

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

1. Log on to Mercury IT Governance Center.
2. Search for the organization unit by selecting **Resource > Organization Model > Modify Org Units** from the menu bar.
3. Click the name of the organization unit you wish to convert.

The View Organization Unit page opens.

4. Click **Modify Org Unit**.

The Modify Organization Unit page opens.

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

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

MERCURY Close Window X

Changing Information Engineers to a Primary Org Unit

Changing Information Engineers to a primary Organization Unit will remove the following resources from their current primary Organization Unit.

Resources that will be Affected		
Resource	Primary Organization Unit	Current Region
Martin Greenbaum	Primary Info Systems	Enterprise
Morton Greenbaum	Primary Info Systems	Enterprise
Moe Greenbaum	Primary Info Systems	Enterprise
Mindy Greenbaum	Primary Info Systems	Enterprise
Martha Greenbaum	Primary Info Systems	Enterprise

Region for this Organization Unit:

Copyright © 2004 Mercury Close Window X

6. Click **Change**.

Chapter

4

Using Resource Management for Capacity Planning

In This Chapter:

- *Overview of Using Resource Management for Capacity Planning*
 - *Planning Capacity with Resource Pools*
 - *Creating a Resource Pool*
 - *Resource Pool Security*
 - *Analyzing Resource Pools*
 - *Viewing Resource Pools*
 - *Rolling Up Resource Pool Information*
 - *Comparing Resource Pools to Staffing Profiles*
 - *Tracking Demand with Staffing Profiles*
 - *Creating a Staffing Profile*
 - *Automatic Tracking of Actuals for Staffing Profiles*
 - *Staffing Profile Security*
 - *Analyzing Staffing Profiles*
 - *Viewing Staffing Profiles*
 - *Comparing a Project's Assignments to its Staffing Profile*
-

Overview of Using Resource Management for Capacity Planning

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

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

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

- **Resource pools.** Resource pools provide a way to track the forecast resource capacity, broken down by skill. This lets the manager see what resources and skills they will have on-hand to apply to future work.
- **Staffing Profiles.** Staffing profiles allow a manager to plan the future allocation of resources, broken down by skill. This lets the user see what kinds of resources and skills they will need for future work.

Planning Capacity with Resource Pools

Resource pools enable resource planners to designate future resource capacity, arranged by skill, on a monthly basis. Program and project managers can then build staffing profiles that draw from a resource pool, and use visualizations to assess whether proposed projects or programs are within capacity bounds outlined by the resource pool. A resource pool is broken down across monthly segments, with each line specifying the “full-time equivalent” (FTE) capacity for a skill, and optionally for a resource that possesses the skill. Resource pools can be associated with primary organization units or programs, linking them with their role in the business. [Table 4-1](#) describes the key attributes of a resource pool.

Table 4-1. Resource pool attributes

Field	Description
Resource Pool Information	
Pool Status	The status of the resource pool. Possible values: New, Proposed, Under Review, In Rework, On Hold, Approved, Rejected, Cancelled, Closed
Active	Whether or not the resource pool is active. Inactive resource pools are not included in Resource Management visualizations.
Name	The name of the resource pool.
Created On	The date the resource pool was created.
Created By	The user who created the resource pool.
Description	A description of the resource pool.
This Resource Pool is for	Defines whether the resource pool is associated with an organization unit, a program (if Mercury Program Management is installed), or Unspecified.
Start Period	The starting period (a fiscal month) for the resource pool.
Finish Period	The ending period (a fiscal month) for the resource pool.
Resource Pool Breakdown	
Skill	The skill being planned. Each resource pool line can hold one skill.
Resource	The resource for the skill. Each resource pool line can hold one resource.
Total FTEs for Month	The total Full Time Equivalents for each month being planned in the resource pool.
Average FTEs for Quarter	The average Full Time Equivalents per quarter being planned in the resource pool.
Notes	Any notes on the resource pool itself.

Figure 4-1 depicts a resource pool containing four different skills and their full-time equivalents for the months of February through April.

View Resource Pool: Tech Educators A

Resource Pool Information

Resource Pool Status: New Active: Yes

Name: Tech Educators A
 Created On: October 29, 2004 Created By: John Smith
 Description:

This Resource Pool is for: Primary Organization Unit - Tech Facilitators

Related Resource Pools

Resource Pool	Relationship	Primary Organization Unit
Information Systems	Parent	Primary Info Systems

Start Period: November 2004 Finish Period: January 2005

Resource Pool Breakdown

Resource Pool Status: New

		Resource Details					
Skill	Resource	Q4 2004			Q1 2005		
		Oct	Nov	Dec	Jan	Feb	Mar
DBA	Tim Wilcox		1.0	1.0	1.0		
Document Manager			1.0	1.0	1.0		
External System...			1.0	1.0	1.0		
Java Consultant			1.0	1.0	1.0		
Total FTE's for Month			4.0	4.0	4.0		
Average FTE's for Quarter			4.0			4.0	

Notes

Currently there are no notes.

Figure 4-1. Resource pool

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

In this resource pool, there is only one skill with a resource attached; “Tim Wilcox” is specified as the DBA for the pool. The other skills could lack specific resources for a number of reasons:

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

Creating a Resource Pool

To create a resource pool:

1. Log on to Mercury IT Governance Center.
2. Select **Resource > Resource Pools > Create a Resource Pool** from the menu bar.

The Create a New Resource Pool page opens.

Create New Resource Pool

Resource Pool Name:

Time Range

Start Period:

Finish Period:

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

The Create New Resource Pool: Enter Details page opens.

Create New Resource Pool: Enter Details

[Configure Access](#) [Create](#) [Cancel](#)

Resource Pool Information

Resource Pool Status: Active: Yes No

Name:

Created On: October 29, 2004 Created By: John Smith

Description:

This Resource Pool is for:

Primary Organization Unit [View](#)

Program: [View](#)

Unspecified

Start Period: November 2004 Finish Period: January 2005 [Change Periods](#)

Resource Pool Breakdown

Resource Pool Status: New

Add Resource Pool Lines

Skill Resource

Please use the Add button to add lines to this Resource Pool.

[Assign Resources](#) [Remove Lines](#)

	Q4 2004			Q1 2005		
	Oct	Nov	Dec	Jan	Feb	Mar
Total FTE's for Month		0.0	0.0	0.0		
Average FTE's for Quarter		0.0		0.0		

Notes

Notes to be added on save:

[Configure Access](#) [Create](#) [Cancel](#)

5. Fill in any desired fields in the Resource Pool Information section.
6. Add lines to the Resource Pool Breakdown.
 - a. Click **Add Resource Pool Lines**.

The Add Lines to Resource Pool page opens.

Add Lines to Resource Pool: Operational Pool A

Name: Operational Pool A Status: New

Line Information

Filter Resources by Skill: Yes No

Skill: Resource:

[Add Another](#)

[Add](#) [Cancel](#)

b. Select a Skill for the resource pool line.

c. (Optional) Specify a Resource for the resource pool line.

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

d. Click **Add**.

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

e. Repeat as necessary.

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

7. Specify full-time equivalent values for each resource pool line.

Create New Resource Pool: Enter Details

[Configure Access](#) [Create](#) [Cancel](#)

Resource Pool Information

Resource Pool Status: Active: Yes No

Name:

Created On: October 29, 2004 Created By: John Smith

Description:

This Resource Pool is for:

Primary Organization Unit [View](#)

Program: [View](#)

Unspecified

Start Period: November 2004 Finish Period: January 2005 [Change Periods](#)

Resource Pool Breakdown

Resource Pool Status: New

Add Resource Pool Lines

Skill	Resource
<input type="checkbox"/>	Java Consultant
<input type="checkbox"/>	External Syste...

[Assign Resources](#) [Remove Lines](#)

Total FTE's for Month

Average FTE's for Quarter

Resource Details

	Q4 2004			Q1 2005		
	Oct	Nov	Dec	Jan	Feb	Mar
		2.0	1.0	2.0		
		3.0	2.0	3.0		
Total FTE's for Month		5.0	3.0	5.0		
Average FTE's for Quarter			4.0			5.0

Notes

Notes to be added on save:

[Configure Access](#) [Create](#) [Cancel](#)

8. Click **Create**.

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

View Resource Pool: Operational Pool A

Resource Pool Information

Resource Pool Status: New **Active:** Yes

Name: Operational Pool A
Created On: October 29, 2004 **Created By:** John Smith
Description:

This Resource Pool is for: Primary Organization Unit - Operations
Start Period: November 2004 **Finish Period:** January 2005

Resource Pool Breakdown

Resource Pool Status: New

		Resource Details					
		Q4 2004			Q1 2005		
Skill	Resource	Oct	Nov	Dec	Jan	Feb	Mar
DBA	<input type="button" value="▾"/>		1.0	2.0	1.0		
Document Manager	<input type="button" value="▾"/>		3.0	2.0	3.0		
External Syste...	<input type="button" value="▾"/>		3.0	2.0	3.0		
Java Consultant	<input type="button" value="▾"/>		2.0	1.0	2.0		
Total FTE's for Month			9.0	7.0	9.0		
Average FTE's for Quarter			8.0			9.0	

Notes

Currently there are no notes.

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 4-2](#). Without these access grants, a user cannot view or edit a resource pool regardless of whether they are specified in the list on the resource pool's Configure Access page. For more information on access grants and security groups, see the *Security Model Guide and Reference*.

Table 4-2. Resource pool access grants

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

Resource Pool Configure Access Page

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



Without the proper access grants, a user cannot view or edit a resource pool regardless of whether they are specified in the list on the resource pool's Configure Access page. See [Resource Pool Access Grants on page 59](#) for more detailed information.

The Configure Access page options are discussed in more detail in [Table 4-3](#).

Table 4-3. Security Options for Resource Pool Configure Access page

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

Using the Configure Access Page

To set up a list of users with View or Edit access to a resource pool:

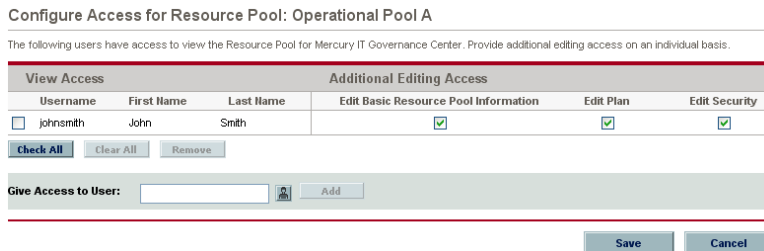
1. Open the View Resource Pool page.

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



2. Click **Configure Access**.

The Configure Access for Resource Pool page opens.



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

4. Click **Add**.

Configure Access for Resource Pool: Operational Pool A

The following users have access to view the Resource Pool for Mercury IT Governance Center. Provide additional editing access on an individual basis.

View Access			Additional Editing Access		
Username	First Name	Last Name	Edit Basic Resource Pool Information	Edit Plan	Edit Security
<input type="checkbox"/>	belindanolan	Belinda Nolan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	betlynolan	Betty Nolan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	billnolan	Bill Nolan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	bobnolan	Bob Nolan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	bradnolan	Brad Nolan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	johnsmith	John Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Give Access to User:

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

Granting Edit access automatically grants the user View access. See [Table 4-3 on page 61](#) for more detailed information on each option.


6. Click **Save**.

Analyzing Resource Pools

Resource capacity planning typically involves the use of both resource pools and staffing profiles. The projected capacity of resources can be tracked with resource pools, while anticipated demand is tracked with staffing profiles. Comparing a resource pool to a staffing profile can yield valuable insight on future resource deployments as they are weighed against planned resource capacity.

Viewing Resource Pools

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



The screenshot shows a portlet titled "Resource Pool List" with a table of resource pools. The table has columns for Resource Pool, Resource Pools for, Status, Active, Start, and Finish. The first row is highlighted, and red arrows point from text annotations to the "Resource Pools for" column and the "Active" column.

Resource Pool	Resource Pools for	Status	Active	Start	Finish
Information Engineering A	Org Unit: Information Engin...	New	Yes	11/04	01/05
Information Systems	Org Unit: Primary Info Systems	New	Yes	11/04	01/05
Operational Pool A	Org Unit: Operations	New	Yes	11/04	01/05
Sales Demo Upgrade Q4 2004		New	Yes	10/04	12/04
SalesDemo	Program: Sales Upgrade Program	New	Yes	12/04	02/05

Annotations:

- Click to open resource pool (points to the "Resource Pools for" column)
- Click to open associated entity (points to the "Active" column)

Figure 4-2. Resource Pool List portlet

Users with View or Edit Resource Pools access grants can add the Resource Pool List portlet to their Dashboard.

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

Search Resource Pools

Export Data to Excel

Select Resource Pool to View Showing 1 to 5 of 5

Resource Pool Name Δ	Status	Organization	Program
Information Engineering A	New	Information Engineers	
Information Systems	New	Primary Info Systems	
Operational Pool A	New	Operations	
Sales Demo Upgrade Q4 2004	New		
Tech Educators A	New	Tech Facilitators	

Showing 1 to 5 of 5

Search for Resource Pool

Please use the search criteria below to find the Resource Pool you wish to view.

Name: Status:

Primary Org Unit: Program:

Active:

*Sort By: Ascending Descending

*Maximum Results Per Page:

Search results appear here

Enter any search criteria

Click to start search

Search results can be exported to Excel spreadsheets

Figure 4-3. Search Resource Pools page

Modifying Resource Pool Lines

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

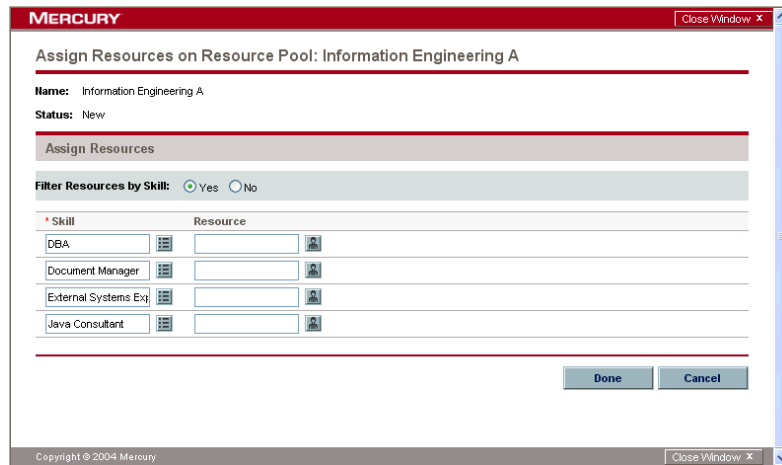
To modify a group of resource pool lines:

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

Skill	Resource
<input checked="" type="checkbox"/> DBA	<input type="checkbox"/>
<input checked="" type="checkbox"/> Document Manager	<input type="checkbox"/>
<input checked="" type="checkbox"/> External System...	<input type="checkbox"/>
<input checked="" type="checkbox"/> Java Consultant	<input type="checkbox"/>

4. Click **Assign Resources**.

The Assign Resources on Resource Pool window opens.



5. Modify the resource pool lines as desired and click **Done**.

You can either change the Skill or Resource.

6. Click **Save**.

The resource pool is saved with the changes.

Rolling Up Resource Pool Information

Resource pools can be linked to primary organization units. Resource pools linked to primary organization units that are part of a hierarchy automatically reflect that hierarchy, rolling up information from resource pools linked to child primary organization units.

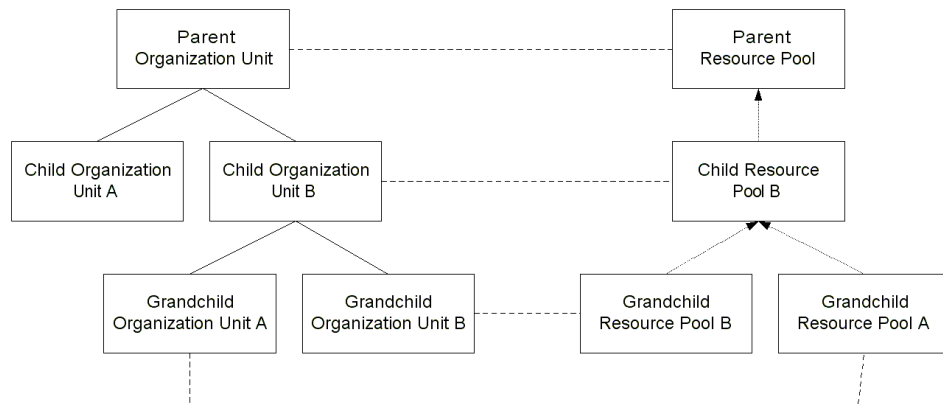


Figure 4-4. Rollup for resource pools attached to primary organization units

Display of rollup information is handled in the following ways:

- The View Resource Pool page displays related resource pools.

Related Resource Pools		
Resource Pool	Relationship	Primary Organization Unit
Operational Pool A	Child	Operations
Tech Educators A	Child	Tech Facilitators

Start Period: November 2004 **Finish Period:** January 2005

Figure 4-5. View Resource Pool page - Related Resource Pools section

- The View Resource Pool page displays rolled-up lines from child resource pools at the bottom of the **Resource Pool Breakdown** section.

Resource Pool Breakdown		Resource Details					
Resource Pool Status: New							
Skill	Resource	Q4 2004			Q1 2005		
		Oct	Nov	Dec	Jan	Feb	Mar
DBA	John Smith		2.0	2.0	2.0		
Document Manager	Jane Smith		2.0	1.0	2.0		
External Syste...	Jose Smith		2.0	1.0	1.0		
Java Consultant			1.0	1.0	1.0		
* Document Manager	Details		5.0	5.0	4.0		
* DBA	Details		3.0	3.0	4.0		
* Java Consultant	Details		4.0	2.0	5.0		
* External Syste...	Details		5.0	5.0	4.0		
Total FTE's for Month			24.0	20.0	23.0		
Average FTE's for Quarter			22.0			23.0	

*FTEs for these lines are rolled up from resource Pools associated with Child Organization Units. These are current as of October 29, 2004 04:23:02 PM PDT; they will be auto-updated within the next 5 minute(s).

Figure 4-6. View Resource Pool page—Resource Pool Breakdown section

Clicking **Details** opens a window displaying the contribution for the rollup line detailed by contributing resource pool and time period.

For each skill represented by a rollup line, the resource pool will retain a manually entered line that will add to its value.



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

Reconciling Resource Pool FTEs to Resource Calendars

The Reconcile Resource Pool FTEs to Resource Calendars page lets you quickly identify over- and under-projection of resource utilization for any resource pool.

- For a resource pool linked to an organization unit, the page lists all the resources entered into the resource pool and all the direct members of the linked organization unit.
- For a resource pool linked to a program or not linked to anything, the page lists all the resources entered into the resource pool itself.

The page displays the resource pool’s members and compares the resource pool FTE numbers with each resource’s individual capacity, calculated from their resource calendar as follows:

$$\text{Cal (in FTE)} = (\text{Number of working days in resource calendar} * \text{resource workload capacity}) / \text{Number of working days in resource’s regional calendar}$$

Over- and under-projection of resource utilization is highlighted in different colors.

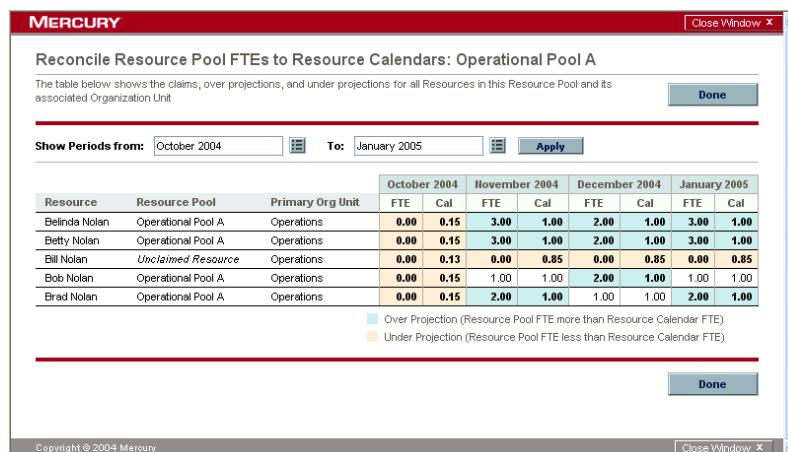


Figure 4-7. Reconcile Resource Pool FTEs to Resource Calendars page

The Reconcile Resource Pool FTEs to Resource Calendars page can identify the following situations:

- **Resource Pool FTE does not match the Resource Calendar FTE.** This exception can occur when a resource pool line is not updated to reflect vacation time set in the resource's calendar.
- **Shared Resource with a total FTE from all resource Pools not matching the Resource Calendar FTE.** The Reconcile Resource Pool FTEs to Resource Calendars page counts the FTEs in all resource pools. This exception occurs if a resource is claimed "Full Time" by more than one resource pool for the same time period.
- **Borrowed Resource.** If a resource is not a member of the organization unit linked to this resource pool, but is projected on the resource pool being examined, then they are borrowed by this resource pool. If this resource is shared by any other resource pool, then they are listed as a "Shared Resource". If not, the name of the current resource pool is listed.
- **Unclaimed Resource.** This exception only occurs for resource pools linked to primary organization units. A resource is marked as "Unclaimed Resource" if they exist in the linked primary organization unit of this resource pool and are not projected in any resource pool for the selected Periods.

You can change the time period examined by the Reconcile Resource Pool FTEs to Resource Calendars page by entering new values in the Show Periods From/To fields and clicking **Apply**.

Comparing Resource Pools to Staffing Profiles

The Analyze Resource Pools page provides a way to assess planned load on resource pools by directly comparing the projected demand in a staffing profile or Profiles to projected capacity in a resource pool or pools. *Figure 4-8* shows the Analyze Resource Pools page and some of its key features.

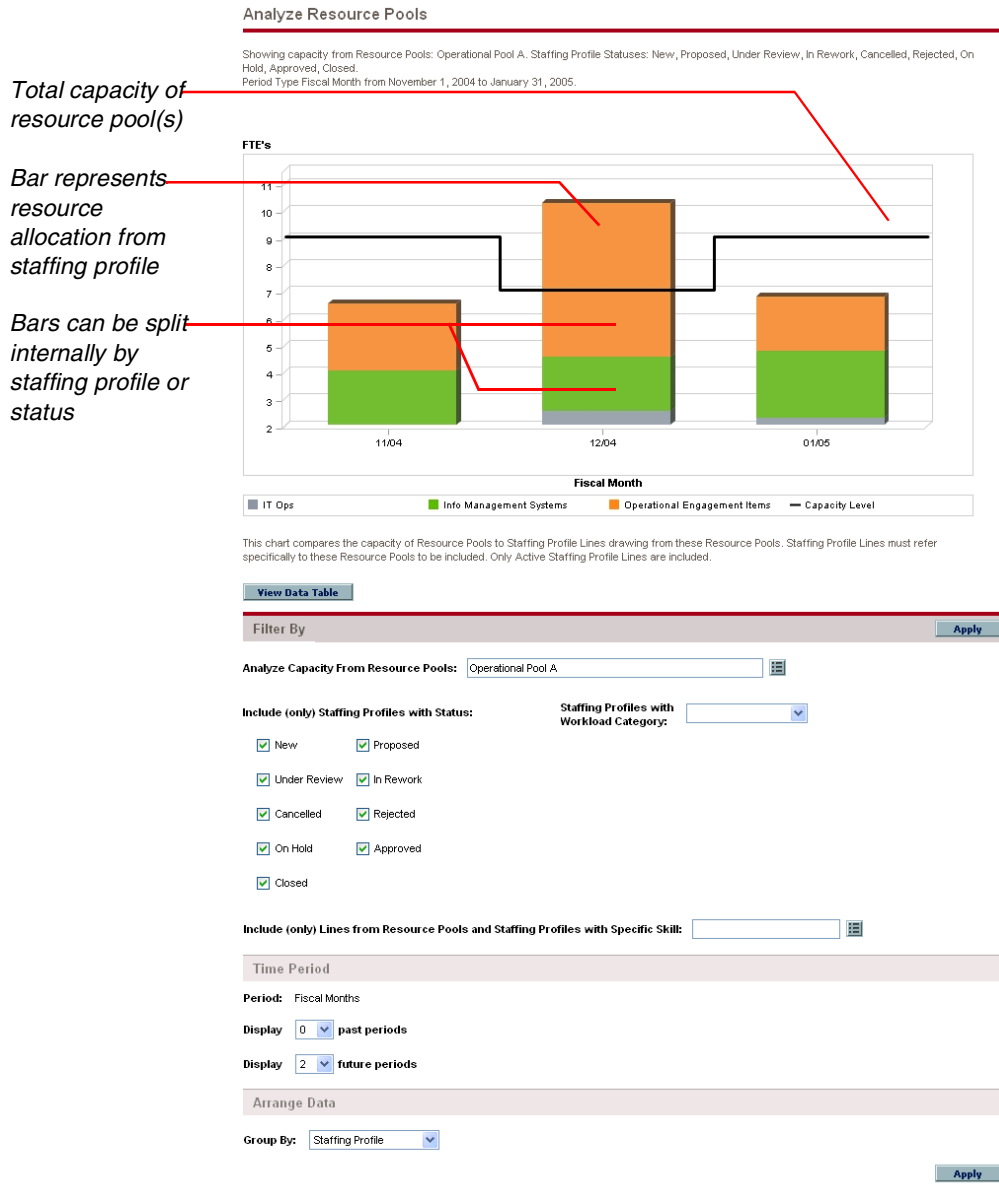



Figure 4-8. Analyze Resource Pools page

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

Table 4-4. Analyze Resource Pools page - parameters

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

To get a breakdown of total resource capacity vs. load by staffing profile, click **View Data Table**. The Analyze Resource Pools Breakdown Table, pictured in [Figure 4-9](#), opens in a new window.

 **Note** For resource pools linked to primary organization units, the capacity line includes the FTEs from all child resource pools as well, meaning all rollup lines are included. Similarly, the resource allocation bars represent all staffing profiles that draw from the child resource pools.

Analyze Resource Pools Breakdown Table

Showing workload breakdown for capacity from Resource Pools: Operational Pool A. Staffing Profile Statuses: New, Proposed, Under Review, In Rework, On Hold, Approved. Period Type Fiscal Month from November 1, 2004 to January 31, 2005.

Assignments (FTEs)			
Capacity			
Resource Pool	11/04	12/04	01/05
Operational Pool A	9.0	7.0	9.0
Totals	9.0	7.0	9.0

Load Assignments			
Staffing Profile	11/04	12/04	01/05
IT Ops	2.0	2.5	2.25
Info Management Systems	2.0	2.0	2.5
Operational Engagement Items	2.5	5.75	2.0
Totals	6.5	10.25	6.75

Figure 4-9. Analyze Resource Pools Breakdown Table

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

The same resource pool analysis functionality is available as a portlet. The Analyze Resource Pools portlet is pictured in [Figure 4-10](#).

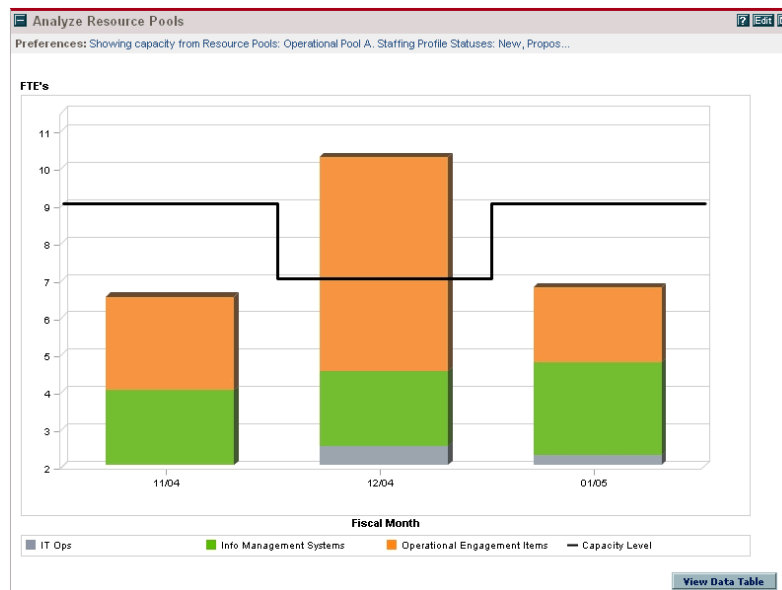


Figure 4-10. Analyze Resource Pools portlet

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

Tracking Demand with Staffing Profiles

Staffing profiles enable a project manager to track the forecast demand of resources, arranged by skill. Each line in a staffing profile tracks the FTE allocation for a skill, and, optionally, a resource who possesses that skill. Staffing profiles include some features that make them simpler to use:

- Staffing profiles can be associated with organization units, making them easy to access.
- If the staffing profile is meant to represent workload, the Workload Category field allows you to categorize it as such.
- New lines in the staffing profile can be set to automatically fill in the Resource Pool value using the New lines on this Staffing Profile draw Resources from field.
- A staffing profile can be linked to organization units, projects, project plans, proposals, assets, or programs to tie them to business functions and facilitate meaningful comparison visualizations.
- These staffing profile lines are then treated as assignments when visualizing operational capacity. See [Visualizing Assignments on page 114](#) for more details.
- Staffing profile lines can also track actual values.

Modify Staffing Profile: IT Ops

View Staffing Profile Configure Access Copy Save Cancel

Staffing Profile Information

Profile Status: Active: Yes No

Name: Workload Category:

Created On: October 29, 2004 Created By: John Smith

Description:

This Staffing Profile is **freestanding**, actuals are **entered manually**.

Start Period: November 2004 Finish Period: January 2005

Staffing Profile Breakdown

Profile Status: New Staffing Profile Lines appear as assignments in capacity visualizations

Add Staffing Profile Lines

Skill	Resource	Oct	Nov	Dec	Jan	Feb	Mar
<input type="checkbox"/>	DBA		1.0	2.0	1.0		
<input type="checkbox"/>	Document Manager		3.0	2.0	1.0		
<input type="checkbox"/>	External Syste...		2.0	1.0	1.0		
<input type="checkbox"/>	Java Consultant		1.0	2.0	3.0		
Total FTE's for Month			7.0	7.0	6.0		
Average FTE's for Quarter			7.0		6.0		

Show: Plan Only Plan and Actuals

Enter Lines In: Months Quarters

Notes

Notes to be added on save:

View Staffing Profile Configure Access Copy Save Cancel

Figure 4-11. Staffing profile

Table 4-5 describes the key attributes of a staffing profile:

Table 4-5. Staffing profile attributes

Field	Description
Staffing Profile Information	
Profile Status	The status of the staffing profile. Possible values: New, Proposed, Under Review, In Rework, On Hold, Approved, Rejected, Cancelled, Closed
Active	Whether or not the staffing profile is active. Inactive staffing profiles are not included in Resource Management visualizations.

Table 4-5. Staffing profile attributes [continued]

Field	Description
Name	The name of the staffing profile.
Workload Category	The category of work being tracked by the staffing profile.
Created On	The date the staffing profile was created.
Created By	The user who created the staffing profile.
Description	A description of the staffing profile.
This Staffing Profile is for	Defines whether the staffing profile is associated with an organization unit, program, project plan, project, asset, proposal, or Unspecified.
New lines on this Staffing Profile draw Resources from	When adding a line to the staffing profile, the Resource Pool field will be automatically defaulted with this value.
Start Period	The starting period (a fiscal month) for the staffing profile.
Finish Period	The ending period (a fiscal month) for the staffing profile.
Staffing Profile Breakdown	
Staffing Profile lines appear as assignments in capacity visualizations	If selected, the Full Time Equivalents set in the staffing profile will be counted as actual work assignments in the Resource Management Analyze Assignment Load capacity visualization.
Add	Adds a line to the staffing profile.
Profile Line Details	This tab displays details on staffing profile lines.
Profile Allocations	This tab displays the FTE allocations for staffing profile lines.
Skill	The skill being projected. Each staffing profile line can hold one skill.
Resource	The resource for the skill. Each staffing profile line can optionally hold one resource per skill.
Assign Resources	Opens a window allowing you to assign resources to selected lines. Active when a line(s) has been checked.
Remove Lines	Removes the selected lines. Active when a line(s) has been checked.
Total FTE's for Month	The total Full Time Equivalents for each month being projected in the staffing profile.

Table 4-5. Staffing profile attributes [continued]

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

Creating a Staffing Profile


To create a staffing profile:


1. Log on to Mercury IT Governance Center.
2. Select **Resource > Staffing Profiles > Create a Staffing Profile** from the menu bar.
3. The Create New Staffing Profile page opens.

Create New Staffing Profile

*Staffing Profile Name:

Time Range

*Start Period: 

*Finish Period: 

4. Enter the Staffing Profile Name.
5. Enter the staffing profile's Start Period and Finish Period.
6. Click **Continue**.

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

Create New Staffing Profile: Enter Details

[Configure Access](#) [Create](#) [Cancel](#)

Staffing Profile Information

Profile Status: Active: Yes No

Name: Workload Category:

Created On: October 29, 2004 Created By: John Smith

Description:

This Staffing Profile is **freestanding**, actuals are **entered manually**. [Change](#)

Start Period: November 2004 Finish Period: January 2005 [Change Periods](#)

Staffing Profile Breakdown

Profile Status: New Staffing Profile Lines appear as assignments in capacity visualizations

[Add Staffing Profile Lines](#)

Skill	Resource	Q4 2004			Q1 2005		
		Oct	Nov	Dec	Jan	Feb	Mar
Please use the Add button to add lines to this Staffing Profile.							
Total FTE's for Month			0.0	0.0	0.0		
Average FTE's for Quarter			0.0			0.0	

Plan Only Plan and Actuals
 Enter Lines In: Months Quarters [Apply](#)

Notes

Notes to be added on save:

[Configure Access](#) [Create](#) [Cancel](#)

7. Fill in any desired fields in the Staffing Profile Information section.
8. (Optional) Enter any other desired information relating to the staffing profile's associations by clicking **Change**. In the Change Properties for Staffing Profile page, determine the staffing profile's associations and whether it tracks actuals from some other entity.

For more information, see [Automatic Tracking of Actuals for Staffing Profiles on page 79](#).
9. Add lines to the Staffing Profile Breakdown.
 - a. Click **Add Staffing Profile Lines**.

The Add Lines to Staffing Profile page opens.

Add Lines to Staffing Profile: IT Ops

Name: IT Ops Status: New

Line Information

Filter Resources by Skill: Yes No

Skill: Resource:

Resource Pool:

Comments:

[Add Another](#)

[Add](#) [Cancel](#)

b. Specify a Skill for the staffing profile line.

c. (Optional) Specify a Resource for the staffing profile line.

Only resources with the selected Skill will appear in the auto-complete list unless you select **No** in the Filter Resources by Skill option. You can use the [Resource Finder](#) to locate suitable resources with the selected Skill; see [Using the Resource Finder on page 100](#) for details.

d. Click **Add**.

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

e. Repeat as necessary.

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

10. Specify full-time equivalent values for each staffing profile line.

You can choose to enter actual values alongside the planned values in each staffing profile line, for comparison purposes. Select the Show Plan and Actuals radio button and click **Apply** to enter actual values. Actual values can also be rolled up from an associated project plan, if one exists. See [Automatic Tracking of Actuals for Staffing Profiles on page 79](#) for more details.

Staffing Profile Breakdown

Profile Status: New Staffing Profile Lines appear as assignments in capacity visualizations

Add Staffing Profile Lines

Skill	Resource
<input type="checkbox"/>	DBA
<input type="checkbox"/>	Document Manager
<input type="checkbox"/>	Java Consultant
<input type="checkbox"/>	External Syste...

[Assign Resources](#) [Remove Lines](#)

	Q4 2004						Q1 2005			
	Oct		Nov		Dec		Jan		Feb	Mar
	Plan	Act	Plan	Act	Plan	Act	Plan	Act	Plan	
Total FTE's for Month			0.0	0.0	0.0	0.0	0.0	0.0		
Average FTE's for Quarter	(Plan) 0.0 (Act) 0.0						(Plan) 0.0 (Act) 0.0			

Plan Only Plan and Actuals
 Months Quarters [Apply](#)

11. Click **Create**.

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

View Staffing Profile: IT Ops

[Modify Staffing Profile](#) [Configure Access](#) [Done](#)

Staffing Profile Information

Profile Status: New **Active:** Yes

Name: IT Ops **Workload Category:**

Created On: October 29, 2004 **Created By:** John Smith

Description:

This Staffing Profile is **freestanding**, actuals are **entered manually**.

Start Period: November 2004 **Finish Period:** January 2005

Staffing Profile Breakdown

Profile Status: New Staffing Profile Lines appear as assignments in capacity visualizations

Skill	Resource	Q4 2004			Q1 2005		
		Oct	Nov	Dec	Jan	Feb	Mar
		DBA		1.0	2.0	1.0	
Document Manager		3.0	2.0	1.0			
External Syste...		2.0	1.0	1.0			
Java Consultant		1.0	2.0	3.0			
Total FTE's for Month		7.0	7.0	6.0			
Average FTE's for Quarter		7.0			6.0		

Plan Only Plan and Actuals
 Months Quarters [Apply](#)

Notes

Currently there are no notes.

[Modify Staffing Profile](#) [Configure Access](#) [Done](#)

Automatic Tracking of Actuals for Staffing Profiles

If a staffing profile is associated with a project plan, you can set it to roll up values for Actual Effort directly from the project plan.



Note

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

The rollup of Actual Effort values from a project plan works thusly:

- Actual FTE values are calculated from the Actual Effort tracked on the project plan's tasks. These values are non-editable and link a drilldown page displaying the details of how the actuals were calculated.
- For a staffing profile line with a resource assigned, the actual value is an aggregation of all the tasks the resource has worked on within the specified period.
- If there are multiple staffing profile lines with the same resource, but different skills, the skills are matched from tasks.
- For a staffing profile line that does not have a resource assigned, the actual value is comprised of all the tasks that have the same skill but lack a resource in the project plan.
- If there are multiple staffing profile lines with the same skill, but no resource, the lines are visually grouped and the actual value appears at the bottom of the group.
- If a skill is not specified in the staffing profile, but there are tasks in the project plan utilizing that skill, a new staffing profile line is automatically created with no Planned values and Actual values as rolled up from those tasks.
- Tasks with no skill or resource assigned all roll up to a read-only "Unspecified" staffing profile line. Such a task should not appear very often in a normal project plan.

To set a staffing profile to roll up Actual Effort values from a project plan:

1. Create a staffing profile or open an existing one and click **Change** in the **Staffing Profile Information** section of the page.

The Change Properties for Staffing Profile page opens.

2. From the This is a ___ Staffing Profile drop-down list, select **Project** or **Project Plan**.
3. Select the desired project or project plan from the auto-complete list.
4. From the Actuals are options, select **Automatically Rolled Up from project plan**.
5. Click **Change**.
6. The staffing profile will roll up actuals from the project plan’s tasks and report them as subtotals in each staffing profile line category.

Automatic Tracking of Actuals with Time Management

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

The **Cost and Effort** tab in the Project Settings window for a project determines whether or not financial data is tracked for a project plan, and how actuals are to be calculated, if at all. The **Cost and Effort** tab also determines how Time Management is used to track effort, if Time Management has been enabled for the system.

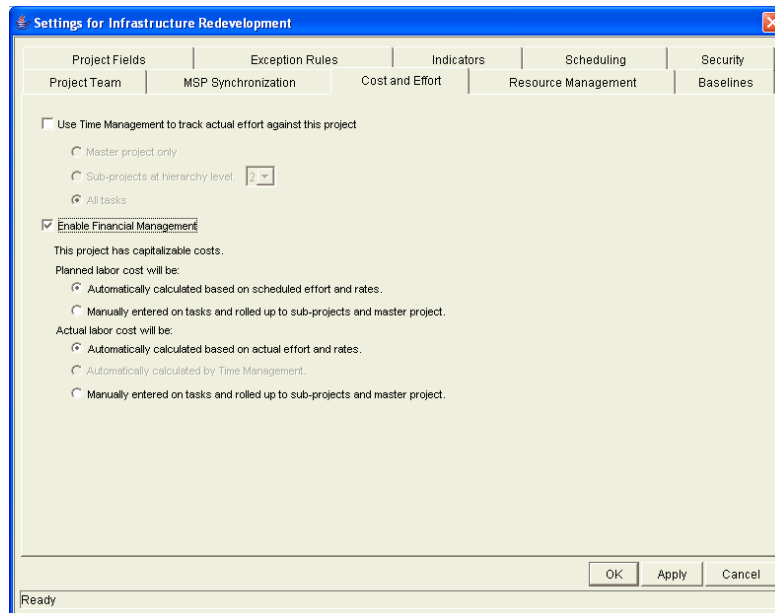


Figure 4-12. Project Plan Project Settings window - Cost and Effort tab

Once Time Management is activated for the project plan, the Actual Effort values entered will roll up into the staffing profile, assuming the staffing profile is set properly (see [Automatic Tracking of Actuals for Staffing Profiles on page 79](#)).

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

1. Log on to Mercury IT Governance Center.
2. Open the project plan in the Workbench.
3. Open the Project Settings window and click on the **Cost and Effort** tab.
4. Select Use Time Management to track actual effort against this project.
5. Select the appropriate level of the project plan to track.
6. Click **OK**.
7. **Save** the project.

Staffing Profile Security

Access to a staffing profile is controlled primarily through access grants set in the security group definitions. Additionally, the user who creates a staffing profile can specify a list of users who can view it, edit its basic information, edit its lines, or edit its security.

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

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.
Approve Staffing Profiles	The user can set the Profile Status to Approved , but nothing else. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles access grant.

Staffing Profile Configure Access Page

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



Without the proper access grants, a user cannot view or edit a staffing profile regardless of whether they are specified in the list on the staffing profile's Configure Access page. See [Staffing Profile Access Grants on page 81](#) 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 Basic Staffing Profile Information	The user can edit the fields in the Staffing Profile Information section, but not the actual Staffing Profile Breakdown, nor change periods.
Edit Plan	The user can edit the Staffing Profile Breakdown, but not the fields in the Staffing Profile Information section.
Edit Security	The user can use the Configure Access page to edit viewing or editing security for the staffing profile.

Using the Configure Access Page

To set up a list of users with View or Edit access to a staffing profile:

1. Open the View Staffing Profile page.

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

View Staffing Profile: IT Ops



2. Click **Configure Access**.

The Configure Access for Staffing Profile page opens.

Configure Access for Staffing Profile: IT Ops

The following users have access to view the Staffing Profile for Mercury IT Governance Center. Provide additional editing access on an individual basis.

View Access			Additional Editing Access			
Username	First Name	Last Name	Edit Basic Staffing Profile Information	Edit Plan and Actuals	Edit Actuals	Edit Security
<input type="checkbox"/>	johnsmith	John Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Give Access to User:

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

Configure Access for Staffing Profile: IT Ops

The following users have access to view the Staffing Profile for Mercury IT Governance Center. Provide additional editing access on an individual basis.

View Access			Additional Editing Access			
Username	First Name	Last Name	Edit Basic Staffing Profile Information	Edit Plan and Actuals	Edit Actuals	Edit Security
<input type="checkbox"/>	belindanolan	Belinda Nolan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	betlynolan	Betty Nolan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	billnolan	Bill Nolan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	bobnolan	Bob Nolan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	bradnolan	Brad Nolan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	johnsmith	John Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Give Access to User:

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

Granting Edit access automatically grants the user View access. See [Table 4-7](#) for more detailed information on each option.

5. Click **Save**.

Analyzing Staffing Profiles

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

Viewing Staffing Profiles

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



Staffing Profile	Workload Category	Active	Start	Finish	Total Hours	Actual Hours
IT Maintenance	Maintenance	Yes	10/04	12/04	51200	51200
IT Ops		Yes	11/04	01/05	3416	0
Finance S/W U...		Yes	04/05	12/05	3056	0
Info Managem...		Yes	11/04	01/05	2904	0
Education Te...		Yes	11/04	01/05	2736	0

Showing 1 to 5 of 11 [Prev](#) [Next](#) [Maximize](#)

Figure 4-13. Staffing Profile List portlet

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

You can also reach staffing profiles by using the Search Staffing Profiles page. The Search Staffing Profiles page is opened by selecting **Search > Staffing Profiles** from the menu bar. [Figure 4-14](#) shows the the Search Staffing Profiles page and some of its key features.

Search Staffing Profiles

Export Data to Excel

Search results can be exported to Excel spreadsheets

Search results appear here

Staffing Profile Name	Status	Staffing Profile For
IS Server Upgrade	New	IS Server Upgrade
IS Workstation Upgrade	New	IS Workstation Upgrade
IT Maintenance	New	Program - InstallationManager Q4 2004 RollOut
IT Ops	New	
Info Management Systems	New	

Showing 1 to 5 of 5

Search for Staffing Profile

Please use the search criteria below to find the Staffing Profile you wish to view.

Name: Status:

This Staffing Profile is for:

Active:

Sort By: Ascending Descending

Maximum Results Per Page:

Click to start search

Search

Figure 4-14. Search Staffing Profiles page

Modifying Staffing Profile Lines

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

To modify a group of staffing profile lines:

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

Skill	Resource
<input checked="" type="checkbox"/> DBA	<input type="text"/>
<input checked="" type="checkbox"/> Document Manager	<input type="text"/>
<input checked="" type="checkbox"/> External Syste...	<input type="text"/>
<input checked="" type="checkbox"/> Java Consultant	<input type="text"/>

4. Click **Assign Resources**.

The Assign Resources on Staffing Profile window opens.

5. Modify the staffing profile lines as desired and click **Done**.

You can either change the Skill or Resource.

6. Click **Save**.

The staffing profile is saved with the changes.

Comparing a Project's Assignments to its Staffing Profile

The Compare Project Assignments to Staffing Profile Lines page compares capacity (as the set of active staffing profiles for a project) to assignments within the project. It can be used to monitor compliance of the project plan and actuals to organizationally agreed-upon staffing levels for the project. Open it by selecting **Resource > Analyze > Project Assignments to Staffing Profile Lines Comparison** from the menu bar. *Figure 4-15* shows the Compare Project Assignments to Staffing Profile Lines page and some of its key features.



Figure 4-15. Compare Project Assignments to Staffing Profile Lines page

The Compare Project Assignments to Staffing Profile Lines page can be filtered according to the parameters described in *Table 4-8*.

Table 4-8. Compare Project Assignments to Staffing Profile Lines page - parameters

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

To get a breakdown of total staffing profile capacity compared to project assignments, click **View Data Table**. The Compare Project Assignments to Staffing Profile Lines Breakdown table, pictured in [Figure 4-16](#), opens in a new window.

MERCURY Close Window X

Compare Projects to Staffing Profile Lines Breakdown

Showing workload breakdown for Projects: DEC Mainline Dev, SXW Synch Project, RAD6.5 Prototype Project. Total Assignments Values for: Scheduled Effort.
Period Type Week from January 3, 2005 to March 6, 2005. Done

	01/03/05	01/10/05	01/17/05	01/24/05	01/31/05	02/07/05	02/14/05	02/21/05	02/28/05
Capacity	180.0	180.0	180.0	180.0	188.0	190.0	190.0	152.0	206.0
Scheduled Effort									
Assigned	96.0	208.0	232.0	72.0	176.0	120.0	40.0	16.0	0.0
Total Charge	96.0	208.0	232.0	72.0	176.0	120.0	40.0	16.0	0.0

Done

Close Window X

Figure 4-16. Compare Projects to Staffing Profile Lines Breakdown table

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

The same staffing profile analysis functionality is available as a portlet. The Compare Project Assignments to Staffing Profile Lines portlet is pictured in [Figure 4-17](#).

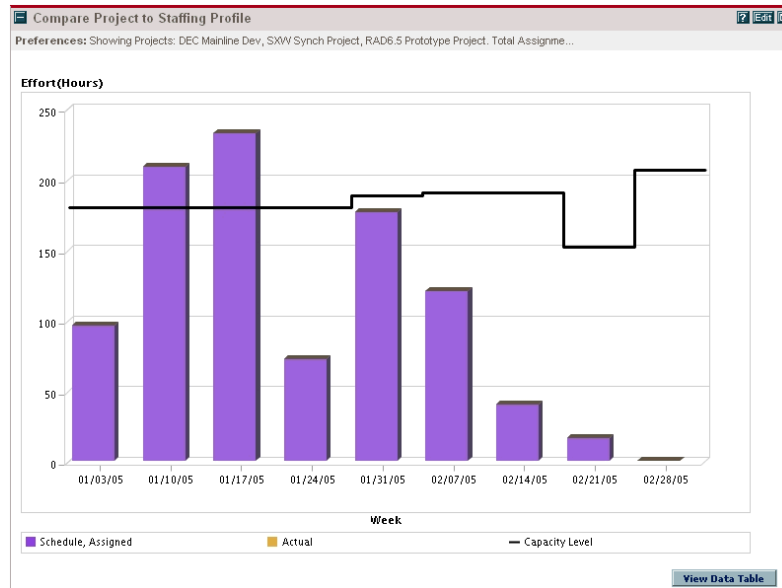


Figure 4-17. Compare Project Assignments to Staffing Profile Lines portlet

You can have multiple instances of this portlet on your Dashboard, for keeping track of different projects and their associated staffing profiles.

Chapter

5

Using Resource Management for Operational Planning

In This Chapter:

- *Overview of Using Resource Management for Operational Planning*
 - *Configuring Requests for Resource Management*
 - *Assigning Requests*
 - *Assigning Tasks*
 - *Associating Skills with Tasks*
 - *Assigning Resources to Tasks*
 - *Booking Multiple Resources on a Task*
 - *Microsoft Project Integration*
 - *Using the Resource Finder*
 - *Searching for a Resource*
 - *Viewing Resource Load*
 - *Comparing Skills*
 - *Overriding Scheduled and Actual Values*
 - *Scheduled Value Field Relationships*
 - *Actual Value Field Relationships*
 - *Viewing Work Items*
 - *My Tasks Portlet*
 - *My Requests Portlet*
 - *Personal Load and Capacity Visualizations*
 - *Visualizing Assignments*
 - *Adjusting Resource Calendars*
-

Overview of Using Resource Management for Operational Planning

This chapter explains how to use Resource Management functionality to perform operational planning tasks and analyze current resource usage. Resource Management can be used for operational resource planning, which concerns itself with how resources are being used for current work. Operational resource planning using Resource Management can consist of the following activities:

- Viewing present resource usage
- Determining areas of over-allocation and under-allocation of workload among resources (load balancing)
- Displaying personal workload for the present and near future
- 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.** Managers use 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 Resource Management can consist of either project tasks or requests.



Note

Assignments made to resources in staffing profile lines can also be tracked as operational load if so desired. See [Tracking Demand with Staffing Profiles on page 72](#) for more information on staffing profiles.

Configuring Requests for Resource Management

In order to consider requests as work items to be tracked in Resource Management, you must associate work item fields with them. See [Setting Up Request Work Item Fields on page 24](#) for more detailed information on associating work item fields with requests.



Note

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

A request work item features the fields described in [Table 5-1](#).

Table 5-1. Request work item fields

Field	Description
Workload/Non Workload	Whether the request work item is counted as load against the assigned resource's capacity.
Workload Category	The reporting category of the request work item.
Scheduled Start Date	The scheduled start date for the request work item.
Scheduled Finish Date	The scheduled finish date for the request work item.
Scheduled Duration	The scheduled duration for the request work item.
Scheduled Effort	The scheduled effort for the request work item.
Assigned Resource	(Already present as the Assigned User.)
Skill	The skill being used by the Assigned Resource. This defaults to the primary skill unless otherwise specified.
% Complete	(Automatically updated by request workflow.)
Actual Start Date	The actual start date for the request work item.
Actual Finish Date	The actual finish date for the request work item.
Actual Duration	The actual duration for the request work item.
Actual Effort	The actual effort for the request work item.

These work item fields have Resource Management interaction built into them through request type rules and other built-in system functionality. For more information on request type rules, see the *Mercury Demand Management: Configuring a Request Resolution System* document.

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

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



Note

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

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

Assigning Requests

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

Assigned To:  

Booking a resource for a request also books that resource's primary skill. If the resource has a different skill you want to book, you can change the value in the Skill field.

The request is counted as load against the resource's capacity and will show up in Resource Management visualizations, such as the two-week Resource Gantt chart pictured in [Figure 5-1](#). If the Workload flag is enabled, the request will show up in load histograms.

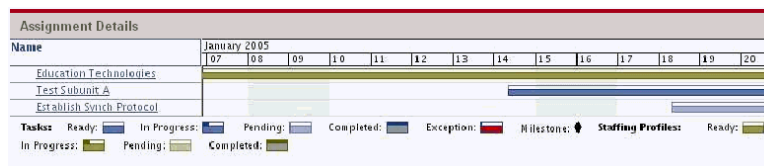


Figure 5-1. Resource Assignment Gantt chart

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



Note

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

Assigning Tasks

Tasks can be assigned a skill or a specific resource.

Associating Skills with Tasks

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

Project : DEC Mainline Dev					
Plan		Cost	EV Analysis	Baselines	
Seq	!	Name	Resource/Proj Manager	Skill	State
1	<input checked="" type="checkbox"/>	[-] DEC Mainline Dev	Thomas Wilcox		Active
2	<input checked="" type="checkbox"/>	[-] Migrate Changes	Martin Greenbaum		Active
3		[-] Enable Core Connections	Morton Greenbaum	DBA	Ready
4		[-] Establish Synch Protocol	Moe Greenbaum	DBA	Pending Predec...
5		[-] Neutralize Data Pathways	Mindy Greenbaum	Java Consult	Pending Predec...
6	<input checked="" type="checkbox"/>	[-] Initialize Main Routine Tasker	Betty Nolan		Active
7		[-] Design Primary Template	Martha Greenbaum	External Syst	Ready
8		[-] Template Design Finalized	Morton Greenbaum	Document M	Pending Predec...
9	<input checked="" type="checkbox"/>	[-] Begin Unit Tests	Belinda Nolan		Active
10		[-] Test Subunit A		DBA	Ready
11		[-] Test Subunit B	Mindy Greenbaum	Java Consult	Ready
12		[-] Test Subunit C	Martha Greenbaum	External Syst	Ready
13		[-] Test Subunit D	Morton Greenbaum	DBA	Ready
14	<input checked="" type="checkbox"/>	[-] Test Verification Protocol	Brad Nolan		Active
15		[-] Verify Tests Alpha	Moe Greenbaum	DBA	Pending Predec...
16		[-] Verify Tests Beta	Mindy Greenbaum	External Syst	Pending Predec...
17		[-] Prototype Synchronization	Martha Greenbaum	Java Consult	Pending Predec...
18		[-] Synch Complete	Morton Greenbaum	External Syst	Pending Predec...

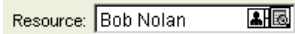
Figure 5-2. Task with Skill assigned but no Resource

To book a skill for a task:

1. Open the project plan.
2. In the Skill field on the task, enter a value.
3. Save the project plan.

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 skill.

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

1. Open the project plan.
2. Change the value in the Skill field.
3. Save the project plan.

Assigned tasks are automatically counted as load against a resource's capacity, and will show up in Resource Management visualizations such as the two-week Resource Gantt chart pictured in [Figure 5-1](#).

The Resource Finder can also be used to find the most appropriate resource to complete the task. The Resource Finder scores resources based on skill suitability and availability. See [Using the Resource Finder on page 100](#) 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 Resource Management behaviors:

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

To assign multiple resources to a task:

1. Open the project in the Workbench.

2. In the Project Plan Panel, enter the username of each resource in the task line's Resource field, separated by semicolons.

- Alternatively, in the Project Plan Panel, use the task line's Resource auto-complete field to assign multiple resources.
- As another alternative, open the task's Task Information window and click on the **Resources** tab.
 - i. Add a new resource to the task by selecting one from the Add Resource to Task auto-complete list and clicking **Add**.
 - ii. Click **Apply** to save changes and continue to work in the Task Information window. Click **OK** to save changes and close the Task Information window.

3. Click **Save**.

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

To change the Scheduled Effort for multiple resources assigned to a task:

1. Open the project in the Workbench.
2. Open the Task Information window for the task you want and click on the **Resources** tab.

Task Name: Launch Window Confirmation

Activity: [] Task State: In Progress

Details Resources Cost Exceptions Predecessors

Add multiple resources to this task or modify partial effort for individual resources

Task Duration: 2.0 days

Task Start: October 27, 2004 **Task Finish:** October 28, 2004

Edit Booked Skill or Partial Effort:

Resource	Effort (hours)
Tina Wilcox	16
Martin Greenbaum	16
Sara Smith	16

Remove Total Effort (hours): 48

Add Resource to Task: [] Add View Resource Details

OK Apply Cancel

Ready

3. For each resource, enter a value in the Effort numeric field.

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

4. (Optional) Add a new resource to the task by selecting one from the Add Resource to Task auto-complete list and clicking **Add**.

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

Microsoft Project Integration

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

Using the Resource Finder

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

- Tasks
- Requests
- Staffing profile lines

The **Resource Finder** icon, pictured in [Figure 5-3](#), is typically the second icon associated with the Resource field on a task, request, or staffing profile line.



Figure 5-3. Resource Finder Icon

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

The Resource Finder's main fields are described in [Table 5-2](#). Its header fields vary depending on whether a search is being run for a task, request, staffing profile, or generically.

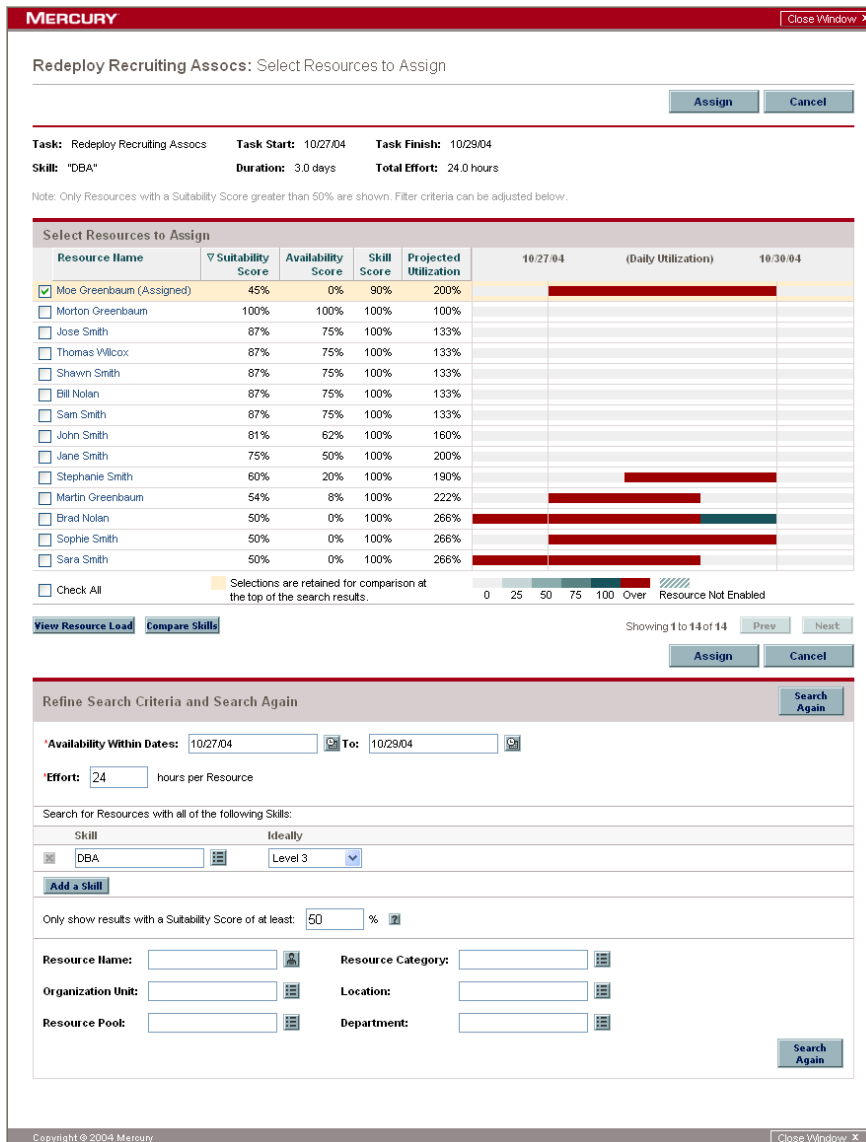


Figure 5-4. Resource Finder

Table 5-2. Resource Finder fields and buttons

Field/Button	Definition
Select Resources to Assign	
(checkbox)	Checking this box 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.

Table 5-2. Resource Finder fields and buttons [continued]

Field/Button	Definition
Suitability Score	A numeric score representing the resource's suitability for the entity in question, based on their related skill and availability. The higher this score, the better.
Availability Score	A numeric score representing the resource's availability for the entity in question, based on their current load and capacity. The higher this score, the better.
Skill Score	A numeric score representing the resource's suitability for the entity in question relative to the skill required.
Projected Utilization	How much the resource would be used if the assignment were made.
Check All	Selects the checkboxes next to all resources listed.
View Resource Load	Opens the Resource Load page with data for all selected resources.
Compare Skills	Opens the Compare Skills page with data for all selected resources.
Prev/Next	Moves on to the next or previous set of search results, with the selected resources (if any) retained at the top of the list.
Assign	Enabled when one or more resources are selected. Assigns the selected resource(s) to the entity in question and closes the Resource Finder.
Cancel	Closes the Resource Finder without making changes.
Refine Search Criteria and Search Again	
Availability Within Dates	Searches for resources available within the selected dates.
Effort	The amount of effort in ours or FTEs required within the available dates. This field only appears on the Resource Finder for tasks and requests.
(X Button)	Removes the skill from the filter list.
Skill	Searches for resources with the selected skill.
Ideally	Searches for resources near the selected Proficiency Level.
Add a Skill	Adds another skill line to the filter list.
Only show results with a Suitability Score greater than	Searches for resources with a Suitability Score greater than the entered value. Clicking the Help icon opens a window describing how the Suitability Score is calculated.

Table 5-2. Resource Finder fields and buttons [continued]

Field/Button	Definition
Resource Name	Only displays the selected resources.
Resource Category	Only displays resources in the selected Category.
Organization Unit	Only displays resources in the selected organization unit.
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.
Limit search to Project Team members	Only displays resources in the project team. This field only appears on the Resource Finder for tasks.
Search Again	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. Enter a Skill 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 skill.

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**, the Resource Finder reloads with the selected resources collected at the top of the list for easy comparison.

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

The filter fields in the **Refine Search Criteria and Search Again** section 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, as well as the available capacity for each resource.

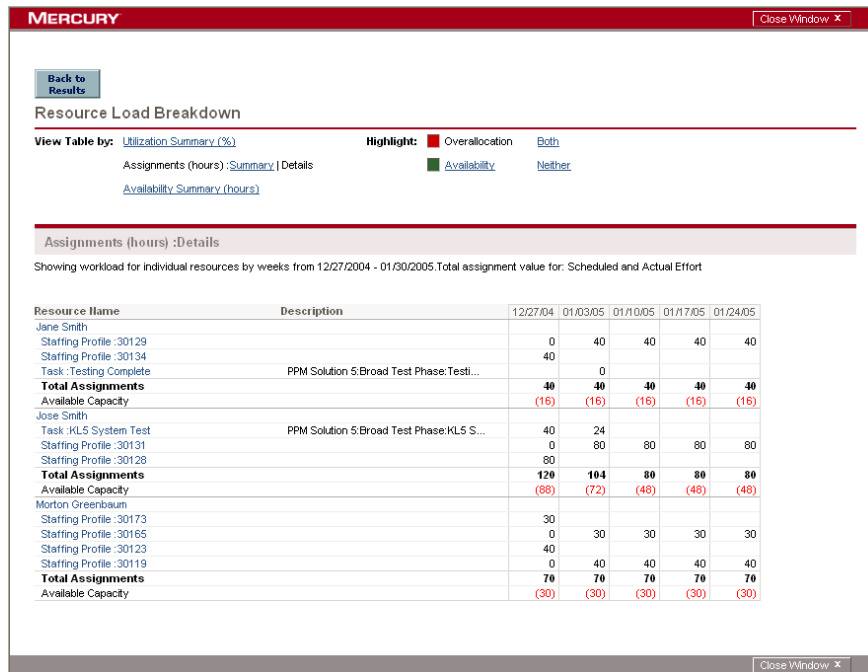


Figure 5-5. Resource Finder Resource Load Breakdown table

To access this table:

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

The Resource Load Breakdown page opens.

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

3. Click **Back to Results** 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 and when they were last used.

MERCURY Close Window X

[Back to Results](#)

Compare Resource Skill

Task: Redeploy Recruiting Assocs **Task Start:** 10/27/04 **Task Finish:** 10/29/04
Skill: "DBA" **Duration:** 3.0 days **Total Effort:** 24.0 hours

Searching for Desired Skills: DBA Level 3

Resource Name	Overall Skill Score	Skill Score	Desired Skills	Proficiency	Last Used On	For Work Item
Moe Greenbaum	90%	90%	DBA	Level 4	10/27/2004	Project:WCB Project 2
Martin Greenbaum	100%	100%	DBA	Level 3		
Brad Nolan	100%	100%	DBA	Level 3		
Stephanie Smith	100%	100%	DBA	Level 3		
Sara Smith	100%	100%	DBA	Level 3		
Sophie Smith	100%	100%	DBA	Level 3		

■ Exact Match ■ Partial Match **Bold** Indicates Primary Skill Note: Not all Resource Skills are shown.

Copyright © 2004 Mercury Close Window X

Figure 5-6. Resource Finder Compare Resource Skills page

To access this table:

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

The Compare Resource Skills page opens.

2. Click **Back to Results** to return to the Resource Finder.

Overriding Scheduled and Actual Values

Work items (both tasks and requests) have fields for the Scheduled and Actual values for:

- Start Date
- Finish Date
- Duration
- Effort

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

Scheduled Duration = Scheduled Finish Date - Scheduled Start Date -
(Regional calendar non-working days)

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



Note

- 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.
- Tasks with resources assigned use the number of working hours in a day set by the resource's regional calendar.
- Requests with resources assigned use the number of working hours in a day set by the resource's regional calendar as well.

Scheduled Value Field Relationships

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

Scheduled Duration = Scheduled Finish Date - Scheduled Start Date -
(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.



Note

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

Actual Value Field Relationships

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

- Start Date. When the work item is started (task is set to **In Progress** or request is submitted)
- Finish Date. When the work item is completed (task is set to **Completed** or request is closed)
- Duration. Calculated as Actual Finish Date - Actual Start Date - (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.



Note

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

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

Viewing Work Items

Once work items have been assigned, there are several ways for resources to view and update their workload from the standard interface.

My Tasks Portlet

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

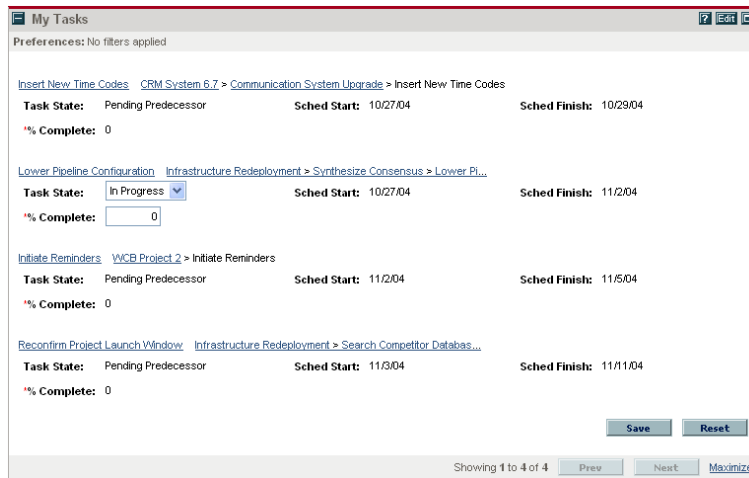


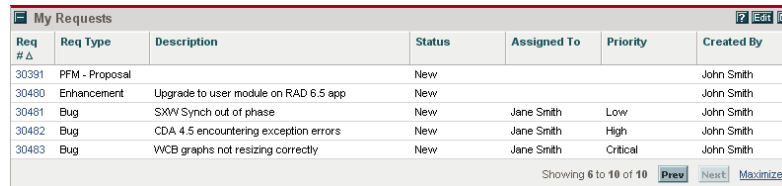
Figure 5-7. My Tasks portlet

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

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.

My Requests Portlet

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



Req # Δ	Req Type	Description	Status	Assigned To	Priority	Created By
30391	PFM - Proposal		New			John Smith
30480	Enhancement	Upgrade to user module on RAD 6.5 app	New			John Smith
30481	Bug	SKW Synch out of phase	New	Jane Smith	Low	John Smith
30482	Bug	CDA 4.5 encountering exception errors	New	Jane Smith	High	John Smith
30483	Bug	WCB graphs not resizing correctly	New	Jane Smith	Critical	John Smith

Showing 6 to 10 of 10 [Prev](#) [Next](#) [Maximize](#)

Figure 5-8. My Requests portlet

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

Personal Load and Capacity Visualizations

To see what their upcoming workload looks like, resources with any Resource Management View or Edit access grant can select **Settings > View my Resource Information** from the menu bar. *Figure 5-9* shows the View Resource page for a resource, including capacity graph and personalized Gantt chart.

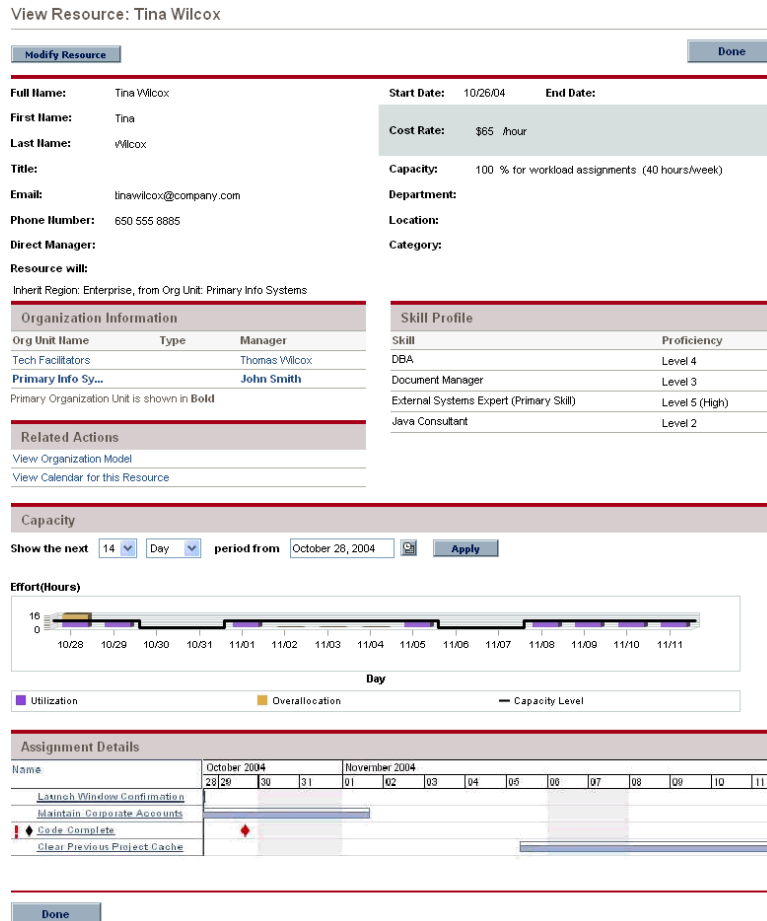


Figure 5-9. View My Resource Information page

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

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



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

Both of these visualizations are also available as portlets.

The Analyze Assignment Load portlet pictured in *Figure 5-10* can be personalized to display only allocations for one resource. For more detailed information on the Analyze Assignment Load visualization, see *Visualizing Assignments* on page 114.

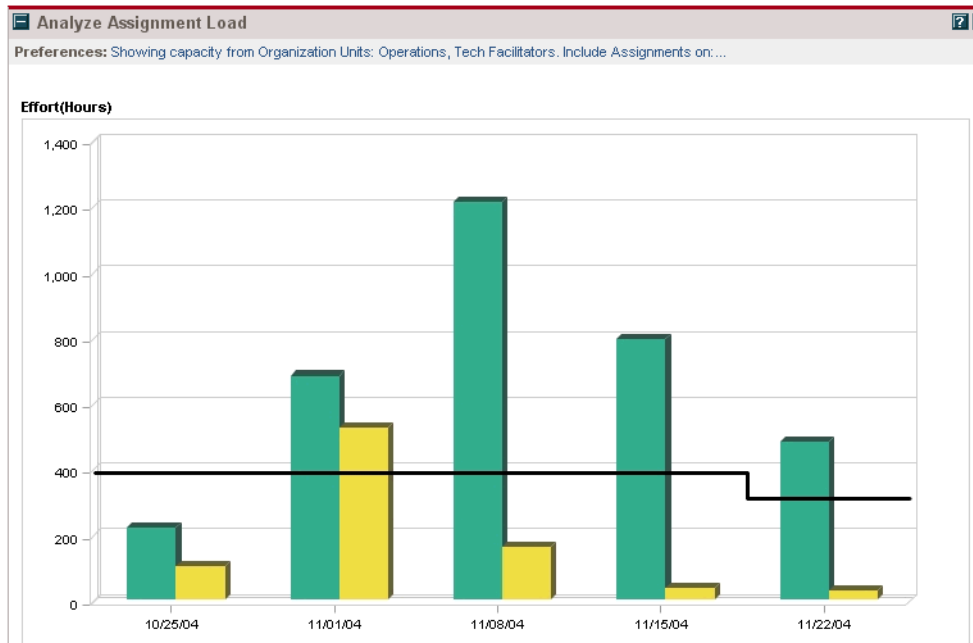


Figure 5-10. Analyze Assignment Load portlet

The Resource Gantt portlet pictured in *Figure 5-11* can be personalized to display only allocations for one resource.

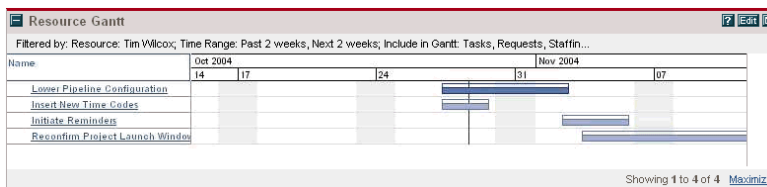


Figure 5-11. Resource Gantt portlet

Visualizing Assignments

A basic task for project managers and request managers is to ensure that work items are assigned to their team members without overloading anyone. This task of balancing the assignments of all resources is called load balancing.

The Analyze Assignment Load page provides a tool for visualizing assignments that allows a manager to view workload sorted according to different criteria and levels of specificity, giving them better control and visibility over their resources' workload. *Figure 5-12* shows the Analyze Assignment Load page, which can help a manager rapidly pinpoint areas of over- or under-allocation.



Figure 5-12. Analyze Assignment Load page

The Analyze Assignment Load page can be filtered according to the parameters described in [Table 5-3](#).

Table 5-3. Analyze Assignment Load page - parameters

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

To get a breakdown of total resource capacity, click **View Resource Breakdown**. The Resource Breakdown Table, pictured in *Figure 5-13*, opens in a new window.

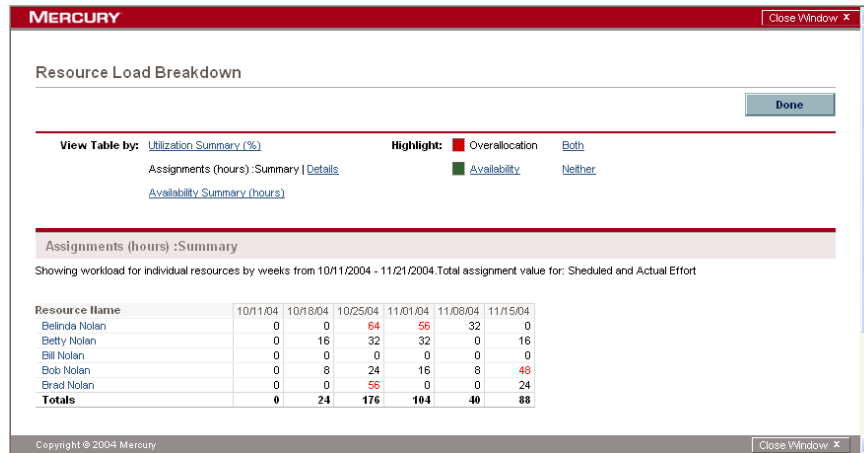


Figure 5-13. Resource Breakdown Table

The Resource Breakdown Table itself can be filtered to show different data according to the parameters described in *Table 5-4*.

Table 5-4. Resource Breakdown Table - parameters

Field	Description
View Table by	<p>Chooses the data to display in the table.</p> <p>Utilization Summary (%) — Shows each resource’s assignments as a percentage of their workload capacity.</p> <p>Assignments (hours) — Shows each resource’s assignment total in working hours.</p> <p>Assignments (hours) - Details — Shows the work items that contribute to the resource’s assignment totals.</p> <p>Availability Summary (hours) — Shows each resource’s total available working hours.</p>
Highlight	<p>Chooses whether to highlight Overallocation (red numbers) or Availability (green numbers) in the table.</p>

To use the Analyze Assignment Load page:

1. Log on to Mercury IT Governance Center.
2. Select **Resource > Analyze > Assignment Load** from the menu bar.

The Analyze Assignment Load page opens with no graph.

Analyze Assignment Load

No Resources matched your filter criteria.

[View Resource Breakdown](#)

Filter By [Apply](#)

Analyze Capacity from:

- Organization Units:
- Resources Managed By:
- Resource Name:
- Resources on Project:
- Resources with primary Skill:

Include Assignments on:

- Tasks
- Requests
- Staffing Profile Lines

Assignments with Workload Category:

Total Assignment Values for:

- Scheduled Effort
- Scheduled and Actual Effort

Time Period

Period:

Display: past periods

Display: future periods

Arrange Data

Group By:

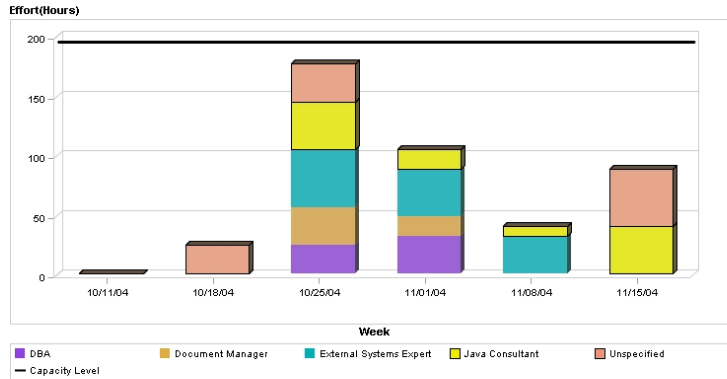
[Apply](#)

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

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

Analyze Assignment Load

Showing capacity from Organization Units: Operations. Include Assignments on: Tasks. Total Assignment Values for: Scheduled Effort. Group By: Skills. Period Type Week from October 11, 2004 to November 21, 2004.



This chart compares assignments to capacity for a set of resources. Capacity is based on resource calendars and workload capacities. Only workload assignments are included.

View Resource Breakdown

Filter By Apply

Analyze Capacity from: Include Assignments on:

Organization Units:
 Resources Managed By:
 Resource Name:
 Resources on Project:
 Resources with primary Skill:

Tasks
 Requests
 Staffing Profile Lines
 Assignments with Workload Category:
 Total Assignment Values for:
 Scheduled Effort
 Scheduled and Actual Effort

Time Period

Period:
 Display: past periods
 Display: future periods

Arrange Data

Group By: Apply

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

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

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



Note

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

- Modifying staffing profiles that call on the resource
- Adjusting the resource's workload capacity
- Assigning a different resource

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 36](#).

Appendix

A

Resource Management Portlets

Information regarding Resource Management data can be organized and presented using Mercury Resource Management portlets. Mercury does not supply a preconfigured Resource Management Dashboard page. See [Table A-1](#) for a complete list of the Resource Management portlets.

Table A-1. Resource Management portlets

Resource Management Portlets	Description
Analyze Assignment Load	Compares capacity [(resource calendars) X (resource workload capacity)] to assignments, such as requests, and staffing profiles marked "treat as assignments." Use to assess upcoming load on resources, in support of manual load leveling.
Analyze Resource Pools	Compares capacity (active resource pools) to load (lines on active staffing profiles drawing from these resource pools). Used to assess planned load on resource pools, in support of strategic resource planning.

Table A-1. Resource Management portlets [continued]

Resource Management Portlets	Description
Compare Project and Staffing Profile	Compares a project to the staffing profile. Compares capacity (as the set of active staffing profiles for a project) to assignments within the project. Monitors compliance of the project plan and actuals to the agreed staffing levels for the project.
Current Resource Load by Organization	Displays the current resource load by organization. Organization unit or skill name is a link to the related detail page. To support breakdowns, sort the list by the organization hierarchy structure.
Current Resource Load By Skill	Displays the current resource load by skills. Shows a snapshot of current load on a set of resources, broken down by the skill required by the work item. When a skill is not specified during, it will default to the resource's primary skill.
Resource Pool List	Lists information regarding resource pools.
Staffing Profile List	Lists staffing profiles. Filter to display a specific staffing profile.

Appendix **B** Reports by Category

In This Appendix:

- *Overview of Report Categories*
 - *Administrative Reports*
 - *Change Management Reports*
 - *Demand Management Reports*
 - *Financial Management Reports*
 - *Portfolio Management Reports*
 - *Program Management Reports*
 - *Project Management Reports*
 - *Resource Management Reports*
 - *Time Management Reports*
-

Overview of Report Categories

Reports available through the Mercury IT Governance Center standard interface are listed (by category) and described in the following sections.



Note

Another type of report in Mercury IT Governance Center (not discussed in this document) are server reports, which are submitted and viewed from the Workbench interface. For information about server reports, see the *System Administration Guide and Reference*.

Administrative Reports

The administrative reports (listed in [Table B-1](#)) are available to users with an administration license.

Table B-1. Administrative reports

Report	Definition
Contact Synchronization	Provides an interface for checking whether Mercury Demand Management contacts are properly defined. This report is also in the Resource category.
Environment Comparison	Helps audit environment definitions when different environments (for example, development and production) are similar to each other.
Environment Detail	Lists the detailed definitions of a given environment or group of environments, the major attributes of the environments, and the attributes of applications tied to the environments.
Environment Group Detail	Contains detailed information about specified environment groups.
Import Requests	Imports requests into Demand Management request tables, moves the requests to the appropriate status, and reports on the results of the execution. For more information about this report, see the <i>Open Interface Guide and Reference</i> .

Table B-1. Administrative reports [continued]

Report	Definition
Import Users	Imports data from the user interface tables or an LDAP server. For more information about this report, see the <i>Open Interface Guide and Reference</i> .
Lookup Types	Provides information about one or more lookups.
Notification History	Provides information about notifications that have been sent or are pending.
Object Type Detail	Lists all parameters and commands associated with a given object type.
Portlet Detail	Provides information about a portlet or range of portlets.
RCS Check In	Template of a report used to check files into the RCS repository (if the RCS file management system is being used).
RCS Check Out	Template of a report used to check files out of the RCS repository (if the RCS file management system is being used).
Report Type Detail	Provides information about report type definitions.
Request Header Type Detail	Lists detailed definitional information for request header types.
Request Type Detail	Lists detailed definitional information for request types.
Run Field Security Denormalization	Runs field level security-related denormalization tasks for particular entities.
Run ITG Organization Unit Interface	Imports data from the organization unit interface tables or an LDAP server. For more information about this report, see the <i>Open Interface Guide and Reference</i> .
Run ITG Package Interface	Validates and loads package data from the package open interface tables into the standard Mercury Change Management data model. For more information about this report, see the <i>Open Interface Guide and Reference</i> .
Run Workflow Transaction Interface	Validates and runs workflow transactions based on data in the workflow open interface tables. For more information about this report, see the <i>Open Interface Guide and Reference</i> .
Security Group Detail	Lists definitional information for one or more security groups.

Table B-1. Administrative reports [continued]

Report	Definition
Special Command Detail	Provides details for a command (special command) or a range of commands.
Synchronize Meta Layer	Assesses or synchronizes the RML (Reporting Meta Layer).
User Data Detail	Displays the definition of custom user data field (for example, fields on entities like packages, requests, workflows, and security groups).
User Detail	Lists the users who have been defined in the Mercury IT Governance system, as well as the security groups attached to each user. This report is also in the Resource category.
Validations	Provides information about the various custom validations that have been entered into the system as well as those that are standard with Mercury IT Governance Center products.
Workflow Detail	Provides detailed definitional information about specific workflows or sets of workflows.
Workflow Statistics	Given a date range and a workflow (or a range of workflows), this report provides statistical information regarding workflow usage.

For More Information

Unless otherwise indicated in *Table B-1*, see the *Reports Guide and Reference* for more information about Administrative reports.

Change Management Reports

The Change Management reports (listed in [Table B-2](#)) are available to users with a Mercury Change Management application license.

Table B-2. Change Management reports

Report	Definition
Compare Custom Database Setup	Runs custom database comparisons.
Compare Filesystem Environment	Compares the files and file structures of two machines.
Compare MS SQL Server 7 Environments	Compares the data model of two SQL Server Version 7 databases.
Compare Oracle Environments	Compares the data model of two Oracle schemas.
Distribution Detail	Lists the contents and results of a distribution.
Environment Comparison by Objects Migrated	Given two environments, this report looks at the history of all the objects migrated into each environment (using Mercury Change Management) and lists any differences.
Environments/Objects Detail	Lists objects that have been migrated into a given environment or set of environments.
Object History	Provides a workflow step transaction history for packages.
Objects/Environments Detail	Lists objects that have been migrated into a given environment or a set of environments.
Package Details	Returns details about a given package.
Package History	Lists the complete workflow history of a given package.
Package Impact Analysis	Lists three separate sections for analysis: <ul style="list-style-type: none"> • Other packages that contain common objects with a given package • Objects that have migrated alongside one or more of the objects being migrated on the given package but are not included in the given package • Recent migrations for each object in the package, showing where changes to the given objects have recently been deployed
Packages Pending	Lists: <ul style="list-style-type: none"> • Open packages with pending activity • Details about each package • Pending work for a group of users

Table B-2. Change Management reports [continued]

Report	Definition
Release Detail	Lists requests, packages and distributions associated with a release.
Release Notes	Shows all of the requests and packages in a release as well as their associations.

For More Information

For more information about Change Management reports, see the *Reports Guide and Reference*.

Demand Management Reports

The Demand Management reports (listed in [Table B-3](#)) are available to users with a Mercury Demand Management application license.

Table B-3. Demand Management reports

Report	Definition
Contact Detail	Queries the contacts already entered in the Demand Management system that are available for entering and updating requests.
DEM Demand Creation History	Shows the history of demand creation for a specified demand set.
DEM Historical SLA Violation	Shown the history of SLA violations for a specified demand set.
DEM Satisfied Demand History	Shows the history of demand that has been satisfied for a specified demand set.
Request Detail	Provides information about requests using a number of selection criteria.
Request Detail (Filter by Custom Fields)	Similar to the Request Detail report except that requests can be filtered by values in custom fields.
Request History	Lists the complete workflow and field change history for each selected request.
Request Quick View	Lists a quick summary of open and closed requests, breaking down the requests by priority.
Request Summary	Displays the total counts for groups of requests matching the selection criteria.
Request Summary (Filter by Custom Fields)	Similar to the Request Summary report except that requests can be filtered by values in custom fields.
Resource Load by Priority	Lists all open requests assigned to different users. This report is also in the Resource category.

For More Information

For more information about Demand Management reports, see the *Reports Guide and Reference*.

Financial Management Reports

The Financial Management reports (listed in *Table B-4*) are available to users with a Mercury Time Management application license.

Table B-4. Financial Management reports

Report	Definition
Actual Time/Cost Summary	Summarizes actual time information entered in non-cancelled time sheets and the calculated charge dollar totals for each grouping. This report is also in the Time Management category.
Project Cost Breakdown	Shows the costs for a project, and the activities with which the costs are associated. This report is also in the Project Management category.
Project Cost Details	Shows the cost details for select projects, grouped by labor/non-labor or operating categorizations. This report is also in the Project Management category.

For More Information

For more information about Financial Management reports, see the *Reports Guide and Reference*.

Portfolio Management Reports

The Portfolio Management reports are available to users with a Mercury Portfolio Management application license.

There are currently no Mercury-supplied reports in this category, but you can create your own custom reports, if you like.

Program Management Reports

The Program Management reports are available to users with a Mercury Program Management application license.

There are currently no Mercury-supplied reports in this category, but you can create your own custom reports, if you like.

Project Management Reports

The Project Management reports (listed in [Table B-5](#)) are available to users with a Mercury Project Management application license.

Table B-5. Project Management reports

Report	Definition
Project Cost Breakdown	Shows the costs for a project, and the activities with which the costs are associated. Totals include both labor and non-labor costs. This report is also in the Financial Management category.
Project Cost Details	Shows the cost details for select projects, grouped by labor/non-labor or operating categorizations. This report is also in the Financial Management category.
Project Critical Path	Displays the tasks that are on a project's critical path.
Project Custom Detail	Generated in HTML table format, showing only the columns that are selected from the header fields and custom fields based on the selected project.
Project Detail	Queries projects by their header fields.
Project Detail (Filter by Custom Fields)	Queries projects by their header fields. You can filter the query using the project's custom fields.
Project Exception Detail	Lists task details for tasks that have violated user-defined exception rules.
Project Resource	Lists all resources working on a given project and the tasks on which they are working. This report is also in the Resource category.
Project Schedule Change	Compares a project plan with a baseline, or a baseline to another baseline.
Project Status Detail	Summarizes project statuses of selected projects and tasks.
Project Summary	Displays all projects that meet the criteria selected in the header fields.
Project Task Assignment	Shows assignment information for a user or a group of users. This report is also in the Resource category.
Project Template Detail	Lists the parameters and parameter details for project templates.

For More Information

For more information about Project Management reports, see the *Reports Guide and Reference*.

Resource Management Reports

The Resource Management reports (listed in *Table B-6*) are available to users with the licenses indicated in the definition column in the table.

Table B-6. Resource Management reports

Report	Definition
Contact Synchronization	Provides an interface for checking whether Mercury Demand Management contacts are properly defined. Available to users with an administration license. This report is also in the Administrative category.
Project Resource	Lists all resources working on a given project and the tasks on which they are working. Available to users with a Mercury Project Management license.
Project Task Assignment	Shows assignment information for a user or a group of users. Available to users with a Mercury Project Management license.
Resource Load by Priority	Lists open requests assigned to different users. Available to users with a Mercury Demand Management license.
User Detail	Lists the users who have been defined in the Mercury IT Governance system, as well as the security groups attached to each user. This report is available to users with any application license. This report is also in the Administration category.
Work Allocation Details	Shows much of the same information shown on the Work Allocation definition page—for example, allocation work item information, budget and actuals to date, charge code allocations, and resource restrictions. Available to users with a Mercury Time Management application license. This report is also in the Time Management category.

For More Information

For more information about Resource Management reports, see the *Reports Guide and Reference*.

Time Management Reports

The Time Management reports (listed in *Table B-7*) are available to users with a Mercury Time Management application license.

Table B-7. Time Management reports

Report	Definition
Actual Time/Cost Summary	Summarizes actual time information entered in non-cancelled time sheets and the calculated charge dollar totals for each grouping.
Actual Time Summary	Summarizes actual time information entered in non-cancelled time sheets.
Time Sheet Details	Summarizes multiple time sheets displays their details.
Time Sheet Summary	Summarizes time information entered in non-cancelled time sheets.
Work Allocation Details	Shows much of the same information shown on the Work Allocation definition page—for example, allocation work item information, budget and actuals to date, charge code allocations, and resource restrictions. This report is also in the Resource category.

For More Information

For more information about Time Management reports, see the *Reports Guide and Reference*.

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