

**Mercury IT Governance Center™**

**Mercury Resource Management™**

**User's Guide**

Version: 7.0



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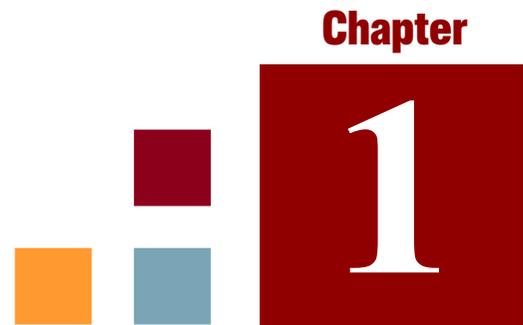
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# Getting Started with Mercury Resource Management

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In This Chapter:

- *Introduction to Mercury Resource Management*
  - *Related Documents*
-

## Introduction to Mercury Resource Management

Mercury Resource Management™ (part of Mercury IT Governance Center™) provides an array of tools for managing personnel related to IT initiatives.

- Role and skill modeling capabilities unlock the potential of resources, while regional calendars make it easier to accurately determine available working hours as well as holidays and vacations. See [Chapter 2, \*Setting Up Resource Management\*, on page 15](#) for more information on the setup work that should be completed before using Resource Management.
- Organizational modeling capabilities keep track of where resources are located and who they report to. See [Chapter 3, \*Modeling Your Organization\*, on page 29](#) for more information on modeling your organization at the individual and group level using Resource Management.
- As resources are assigned to tasks and requests, executives and managers have full visibility into the capacity of their teams and the load placed on them, in terms of both current execution and capacity planning for the future.
  - To support future demand and project planning, resource forecasting capability is achieved with staffing profiles and resource pools. High-level visualizations help program and resource managers with assessing project feasibility and timing, and with making advance staffing decisions and allocations. See [Chapter 4, \*Using Resource Management for Capacity Planning\*, on page 45](#) for more information on using resource pools and staffing profiles to model and plan for resource allocations.
  - 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. See [Chapter 5, \*Using Resource Management for Work Plan and Request Execution\*, on page 81](#) for more detailed information on using Resource Management visualizations to assess current resource usage and optimize operational capacity.

## Related Documents

Related documents for this book are:

- *Mercury Demand Management User's Guide*
- *Mercury Deployment 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*



**Chapter**

**2**

## **Setting Up Resource Management**

---

### **In This Chapter:**

- *Overview of Setting Up Resource Management*
  - *Setting Up Resource Management Validations*
  - *Setting Default Time Period Views*
  - *Setting Up Roles*
    - *Creating a New Role*
    - *Modifying Existing Roles*
    - *Deleting Roles*
  - *Setting Up Skills*
    - *Creating a New Skill*
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    - *Deleting Skills*
  - *Setting Up a Regional Calendar*
    - *Specifying the System Default Regional Calendar*
    - *Setting Up Regions*
  - *Setting Up Request Work Item Fields*
  - *Setting Up Resource Pools*
-

## Overview of Setting Up Resource Management

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

- Setting values for Resource Management-specific fields by altering the fields' validations
- Setting default time period views for staffing profiles and resource pools
- Creating and modifying roles that will be assigned to resources
- Creating and modifying skills that will be assigned to resources
- Setting up regional calendars that will determine holidays
- Determining request types that will count as workload, if any
- Creating resource pools

## Setting Up Resource Management Validations

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

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

Validation	Description
KNTA - Department - Enabled	All resources have an optional <b>Department</b> field that can be used to assist resource searches. Mercury-supplied values are provided for this validation, but may not match your company's terminology.
RSC - Resource Category	All resources have an optional <b>Category</b> field that can be used to assist resource searches. Mercury-supplied values are provided for this validation, but may not match your company's terminology.
RSC - Location	All resources have an optional <b>Location</b> field that can be used to assist resource searches. Mercury-supplied values are not provided for this validation.

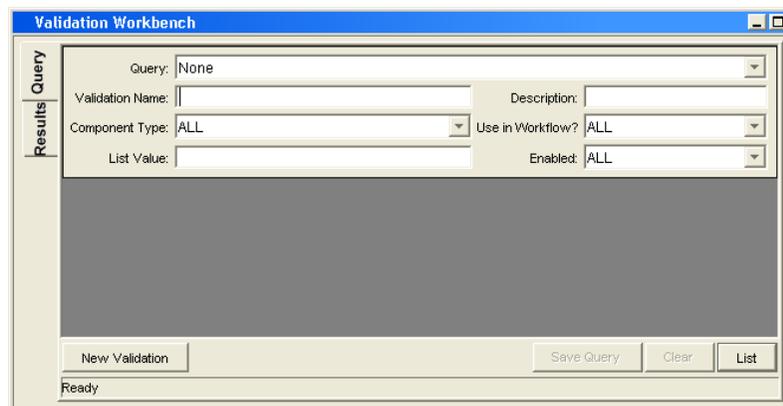
Table 2-1. Resource Management validations (page 2 of 2)

Validation	Description
RSC - Org Unit Type	All organization units have an optional <b>Type</b> 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 <b>Category</b> 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 <b>Workload Category</b> field that can be used to divide work items into major reporting categories for analysis purposes. Mercury-supplied values are provided for this validation, but may not match your company's terminology.
RSC - Resource Title	All resources have an optional Resource Title field that can be used to assist resource searches. Mercury-supplied values are provided for this validation, but may not match your company's terminology.

To modify the values for these field validations:

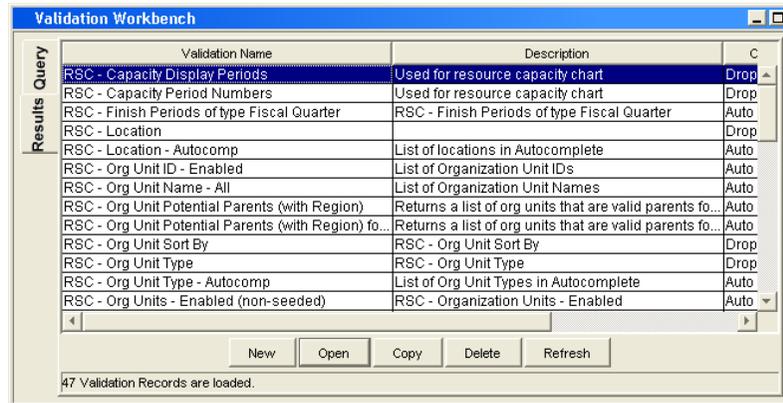
1. Log on to Mercury IT Governance Center and open the Workbench.
2. From the shortcut bar, select **Configuration > Validations**.

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.



4. Modify the validations listed in *Table 2-1* to conform to your business model.
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 Default Time Period Views

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

- Time periods
  - Years
  - Quarters
  - Months
  - Weeks
- Totals per resource
  - Hours
  - Full time equivalents (FTEs)

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

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

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

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

## Setting Up Roles

Resource Management allows you to define roles and associate them with resources. Roles are associated with staffing profile positions as well as tasks on work plans, and help to clearly describe resource requirements. These roles can drive cost rates used when computing labor costs for tasks or staffing profile positions.



Note

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

## Creating a New Role

To add a new role:

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

The Create a New Role page opens.

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

The role is created and the View Role page opens.

You can now add this role to any resource.

## Modifying Existing Roles

To modify an existing role:

1. Log on to Mercury IT Governance Center.
2. Select **Resource Management > Roles & Skills > Browse Roles** from the menu bar.

The Browse Roles page opens.

3. Click on a role **Name** to open its Modify Role page.
4. Make any necessary changes and click **Save**.

## Deleting Roles

To delete a role:

1. Log on to Mercury IT Governance Center.
2. Select **Resource Management > Roles & Skills > Browse Roles** from the menu bar.

The Browse Roles page opens.

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

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

## Setting Up Skills

Resource Management allows you to define skills and associate them with resources. To better describe resource requirements, skills are associated with staffing profile positions as well as work plan tasks.



Note

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

## Creating a New Skill

To add a new skill:

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

The Create a New Skill page opens.

Create a New Skill

---

Name:

Category:

Description:

Enabled:  Yes  No

---

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

The skill is created and the View Skill page opens.

You can now add this skill to any resource.

## Modifying Existing Skills

To modify an existing skill:

1. Log on to Mercury IT Governance Center.
2. Select **Resource Management > Roles & Skills > Browse Skills** from the menu bar.

The Browse Skills page opens.

3. Click on a skill **Name** to open its Modify Skill page.
4. Make any necessary changes and click **Save**.

## Deleting Skills

To delete a skill:

1. Log on to Mercury IT Governance Center.
2. Select **Resource Management > Roles & Skills > Browse Skills** from the menu bar.

The Browse Skills page opens.

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

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

## Setting Up a Regional Calendar

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

To set up a regional calendar:

1. Log on to Mercury IT Governance Center.
2. Select **Administration > Regions > Browse Regional Calendars** from the menu bar.

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

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

The Modify Regional Calendar <Name> page opens.

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

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

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

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

6. Click **Save**.

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

## Specifying the System Default Regional Calendar

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

There can be only one System Default Regional Calendar, which is set during installation or upgrade of the 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 > Regions > Set System Default Regional Calendar** from the menu bar.

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

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

## Setting Up Regions

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

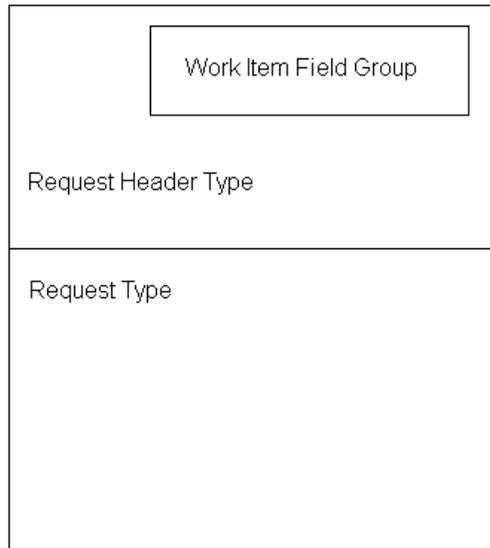
## Setting Up Request Work Item Fields

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 83*):

- 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. 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 one-to-one mapping between the request header type and the request type.

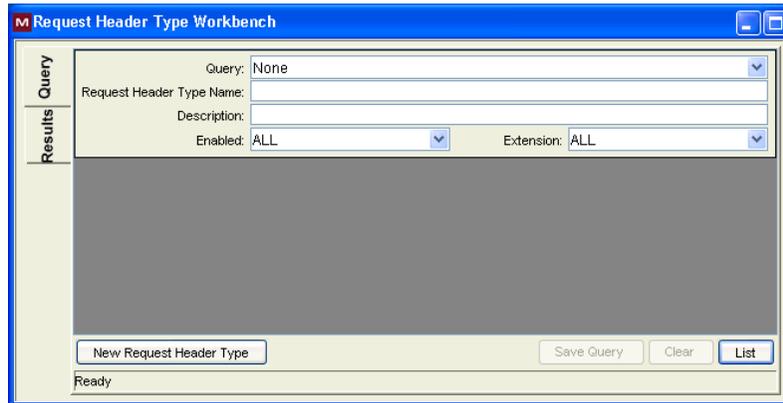
■ ■ Note

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:

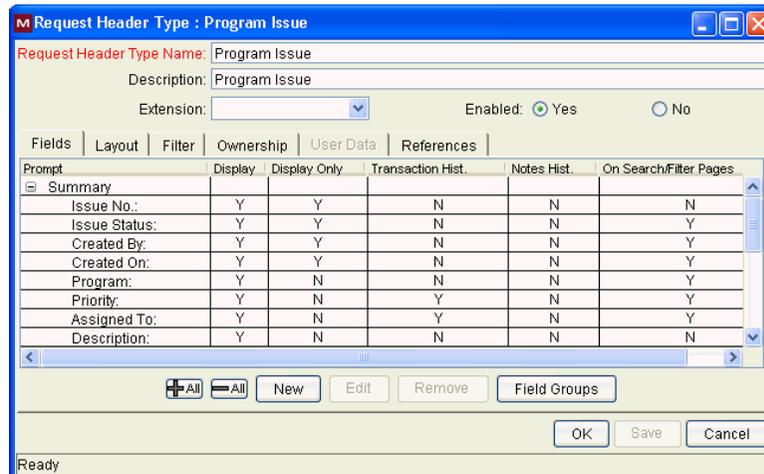
1. Log on to Mercury IT Governance Center and open the Workbench.
2. From the shortcut bar, select **Demand Mgmt > Request Header Types**.

The Request Header Type Workbench opens.



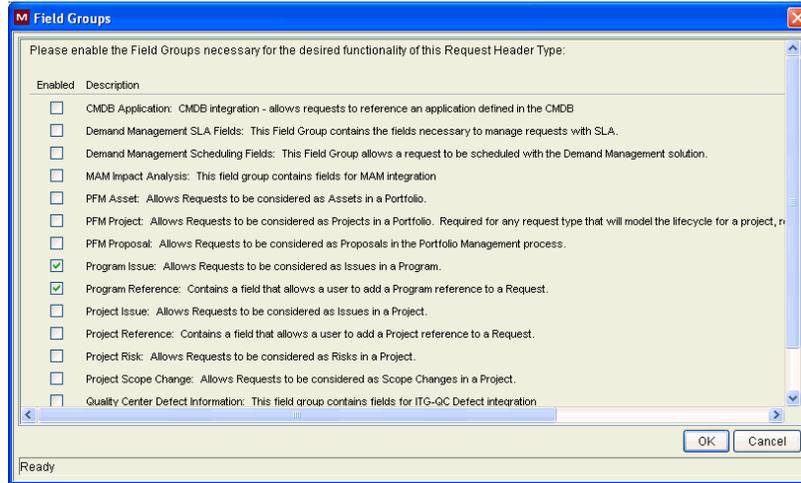
3. Click **New Request Header Type**.

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 Center 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 Configuration Guide* 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 Configuration Guide* 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.

## Setting Up Resource Pools

Resource pools enable resource planners to designate future resource capacity, arranged by role or organization unit. For a more detailed discussion of resource pools and their role in resource management, see [Chapter 4, \*Using Resource Management for Capacity Planning\*, on page 45](#).

Mercury recommends that you set up resource pools before creating any staffing profiles. For detailed instructions on setting up resource pools, see [Planning Capacity with Resource Pools on page 47](#).

**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, among them:

- Configuring information for individual resources
  - Resource attributes like name, phone number, email address
  - Calendar information for each resource, including planned vacation days
  - Resource security settings that determine what the resource can view and edit
- Setting up organization units
  - Placing resources inside organization units
  - Setting organization units' relationships to each other
  - Determining whether an organization unit's membership is linked to a particular security group
  - Determining whether an organization unit is primary or matrixed

## Setting Up a Resource

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

- First and last name
- Phone number
- Email address
- Direct manager
- Department
- Role
- Skills
- Region
- Time sheet approver

Figure 3-1. View Resource page

View Resource: Gloria Nunez

---

General | Role / Skill | Calendar | Time Management | Capacity / Load

General Resource Settings

**Full Name:** Gloria Nunez      **Start Date:** 1/1/06      **End Date:**

**\*First Name:** Gloria      **Title:**

**\*Last Name:** Nunez      **Department:**

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

**Phone Number:**      **Category:**

**Direct Manager:** Bruce Solomon

**Resource will:**  
Inherit Region: MercuryUS, from Org Unit: Unspecified

Organization Information			Resource Pool Participation	
Org Unit Name	Type	Manager	Resource Pool	Current Participation (eff. 8/11/06)
Unspecified			Shared DBAs	100%
Non-Matrixed Organization Units are shown in Bold.			Non-Work Load Capacity	0%
			<b>Total</b>	<b>100%</b>

**Related Actions**

Modify User Information for this Resource (Workbench)

View Organization Model

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
Role	Used in resource booking and to build staffing profiles and resource pools (see <a href="#">Using Resource Management for Capacity Planning</a> on page 45). See <a href="#">Setting Up Roles</a> on page 19 for more detailed information.
Skills	Used to further describe resource requirements for tasks and staffing profile positions beyond the role description. See <a href="#">Setting Up Skills</a> on page 21 for more detailed information.
Region	Used to determine the resource's regional calendar and currency settings. A resource can inherit their region setting from their primary organization unit, or a region can be specified directly. For more information on regions and regional calendars, see <a href="#">Setting Up a Regional Calendar</a> on page 23. For more information on currency settings, see the <i>Mercury Financial Management User's Guide</i> .

Resources map to Mercury IT Governance Center users on a one-to-one 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.

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

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

## Setting Resource Attributes



Note

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

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

The Modify Resources search page opens.

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

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

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

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

5. Fill in any desired resource attributes.

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

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

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



Note

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

## Setting Up the Resource Calendar

A resource's calendar, which specifies working and non-working days for that particular resource, is configured in the standard interface.

To set a resource's calendar:

1. Open the resource's Modify Resource page as described in *Setting Resource Attributes on page 32*.
2. Open the resource's calendar by clicking the **Calendar** tab of the Modify Resource page.
3. Select a day or range of days by using **Shift + click** or **Ctrl+ click**.
4. Choose the **Non-Working day** option to mark those days as non-working.

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

5. Click **Save**.

The resource's calendar is set and will be used to calculate that resource's capacity in 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 <b>Direct Manager</b> .
Edit all resources	The user can view and edit information for all resources in the system.

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.

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

Figure 3-2. Sample organization model

View Organization Model

[Create New Organization Unit](#) [Search for Organization Units](#)

Show me:  All Organization Units  Only Enabled Organization Units [Refresh](#)

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

[Expand All](#) [Collapse All](#)

[Create New Organization Unit](#) [Search for Organization Units](#)

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 47 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 43 for more information.

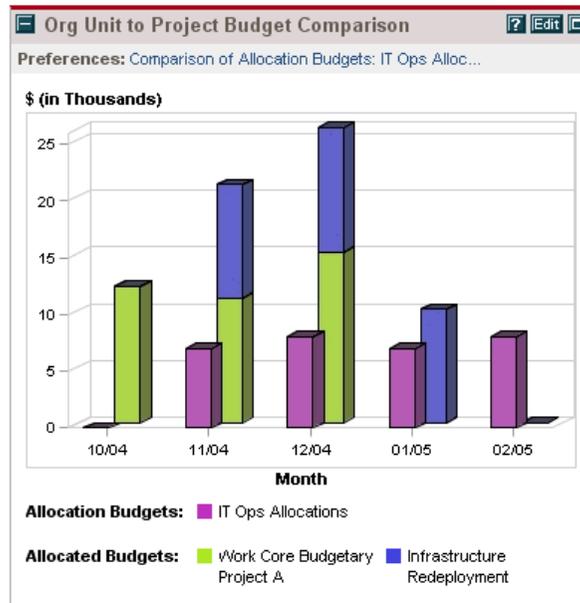


Note

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

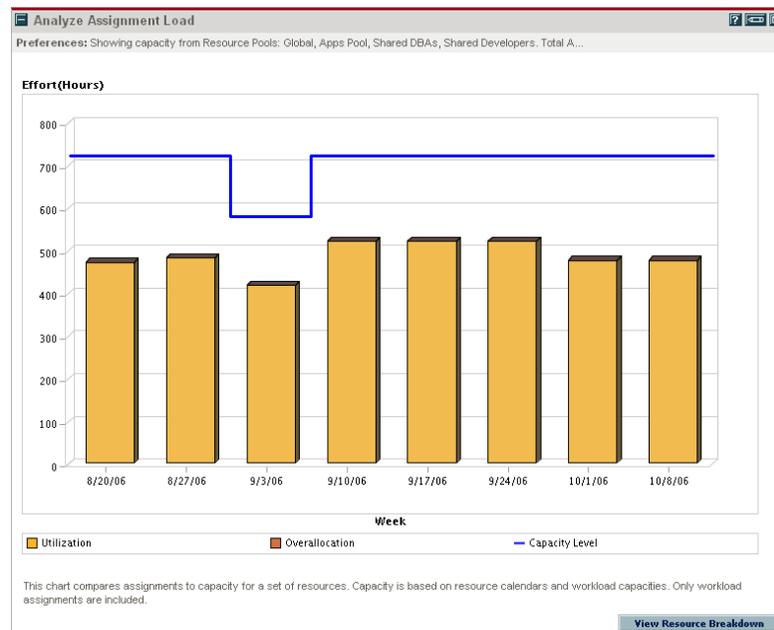
Organization units can have budgets, staffing profiles, and resource pools associated with them, making it easy to run comparisons.

Figure 3-3. 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 portlet. The total capacity for the organization unit is calculated from each resource’s calendar and workload capacity.

Figure 3-4. Analyze Assignment Load portlet



## Creating an Organization Unit

To create an organization unit:

1. Log on to Mercury IT Governance Center.
2. Select **Resource Management > 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

Use this Region:

**Enabled:**  Yes  No

---

Direct Members		
Username	Full Name	Primary Org Unit
There are currently no Direct Members.		
No Results <input type="button" value="Prev"/> <input type="button" value="Next"/>		

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:** Information Architecture

**Department:** Corporate IT

**Type:** Group

**Manager:** Gloria Nunez

**Location:** San Francisco

**Budget:** [View]

**This Organization Unit is a:**

Primary Organization Unit

Matrix Organization Unit

**Parent Org Unit:** [View]

Inherit Region from Parent

Use this Region: [View]

**Enabled:**  Yes  No

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

Showing 1 - 4 of 4 [Prev](#) [Next](#)

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

Add New Organization Members:

**Resource:** [Add]

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

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

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

View Organization Unit: QA (Primary Organization Unit)

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

**Name:** QA

**Department:**

**Type:** Team

**Manager:** Solomon, Bruce

**Location:**

**Budget:**

**Parent Org Unit:** Applications

**Inheriting Region:** MercuryUS

**Regional Calendar:** US

**Currency:** United States Dollar

**Enabled:** Yes

Note: This is a Primary Organization Unit.

Direct Members		
Username	Full Name	Primary Org Unit
molive	Marjole Olive	QA
ngiddings	Nancy Giddings	QA
tbeach	Tony Beach	QA

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

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

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

**Related Actions**

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

[Done](#)

## Building the Organization Model

The organization model is a hierarchy of organization units. *Figure 3-5* illustrates the terms used by Resource Management when defining the organization model.

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

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

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

*Figure 3-6. Top of Modify Organization Unit page*

Modify Organization Unit: QA (Primary Organization Unit)

[View Org Unit](#) [Save](#) [Cancel](#)

---

**Name:**  **Parent Org Unit:**  

**Department:**  **Inherit Region from Parent:**  MercuryUS

**Type:**  **Use this Region:**   [View](#)

**Manager:**   **Change to a Matrix:** Organization Unit: [Change](#)

**Location:**  **Enabled:**  Yes  No

**Budget:**   [View](#)

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

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

Child Organization Units		
Name	Type	Enabled
There are currently no child Organization Units.		
<a href="#">Create a New Child Org Unit</a>		

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

1. Log on to Mercury IT Governance Center.
2. Selecting **Resource Management > Organization Model > Search Org Units** from the menu bar.

The Modify Organization Units page opens.

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

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

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

The View Organization Unit page opens.

View Organization Unit: QA (Primary Organization Unit)

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

---

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

**Budget:**

Direct Members		
Username	Full Name	Primary Org Unit
molive	Marjole Olive	QA
ngiddings	Nancy Giddings	QA
tbeach	Tony Beach	QA

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

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

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

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

[Done](#)

5. Click **Modify Org Unit**.

The Modify Organization Unit page opens.

Modify Organization Unit: QA (Primary Organization Unit)

[View Org Unit](#) [Save](#) [Cancel](#)

---

**Name:** QA **Parent Org Unit:** Applications   
**Department:** **Inherit Region from Parent:** MercuryUS  
**Type:** Team **Use this Region:**  [View](#)  
**Manager:** Bruce Solomon **Change to a Matrix Organization Unit:** [Change](#)  
**Location:** **Enabled:**  Yes  No  
**Budget:** [View](#)

Direct Members		
Username	Full Name	Primary Org Unit
<input type="checkbox"/> molive	Marjole Olive	QA
<input type="checkbox"/> ngiddings	Nancy Giddings	QA
<input type="checkbox"/> tbeach	Tony Beach	QA

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

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

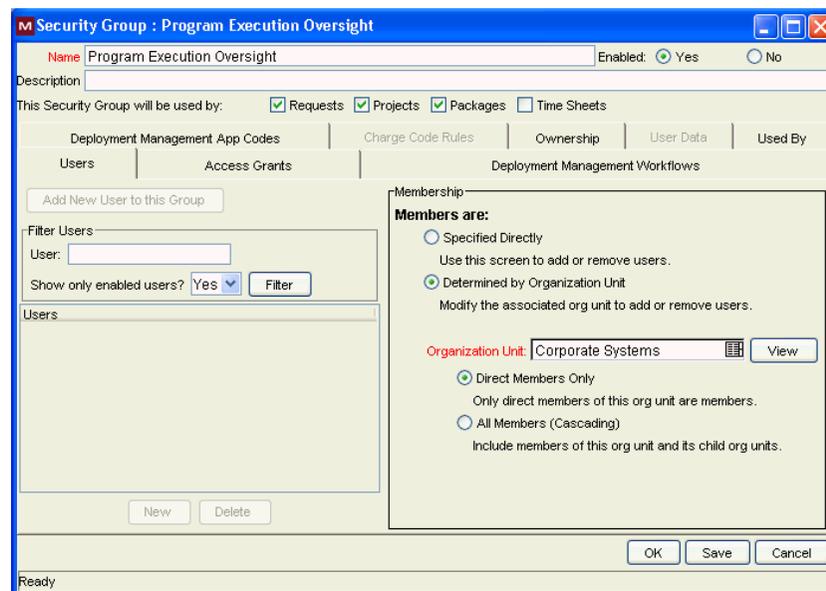
[Create a New Child Org Unit](#)

[Save](#) [Cancel](#)

## 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 Center administrators to business users who actually manage organization units.

Figure 3-8. 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.

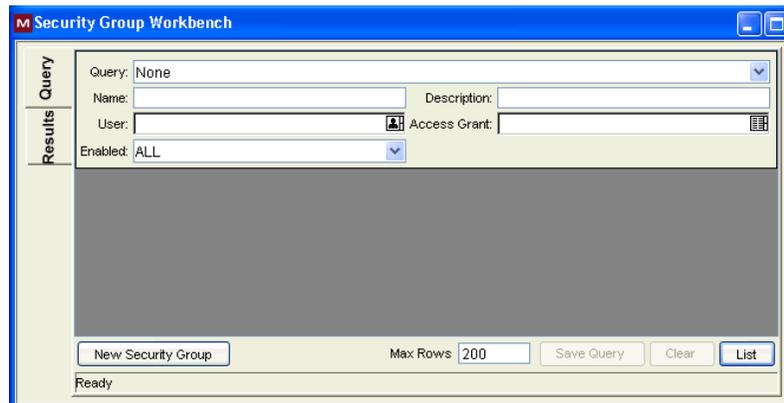
If a security group's members are determined by its organization unit, an additional level of control is added:

- **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.



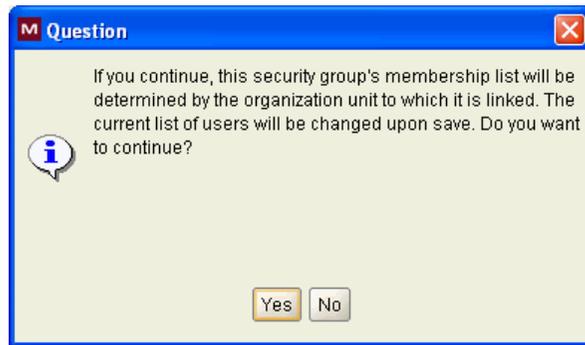
3. Create a new security group or search for and open an existing one.

The Security Group window opens.

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

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

- Click **Yes** to continue.



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

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

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

## Converting Organization Unit Type

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

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

When you attempt to make this conversion, 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.

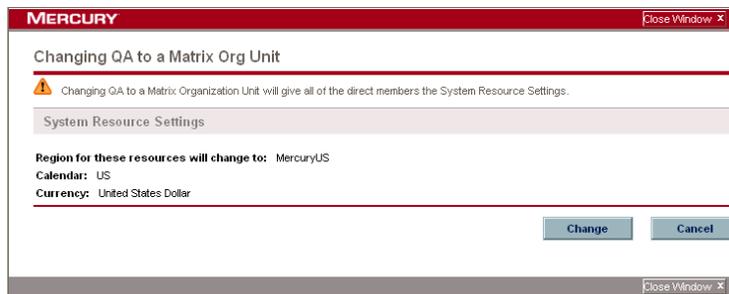
The View Organization Unit page opens.

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.



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*
  - *Using Resource Pools: General Walkthrough*
  - *Creating a Resource Pool*
  - *Viewing Resource Pools*
  - *Adjusting Resource Participation Within Resource Pools*
  - *Resource Pool Security*
  - *Rolling Up Resource Pool Information*
- *Tracking Demand with Staffing Profiles*
  - *Using Staffing Profiles: General Walkthrough*
  - *Creating a Staffing Profile*
  - *Viewing Staffing Profiles*
  - *Sending Resource Requests from a Staffing Profile*
  - *Staffing Profile Security*
  - *Using Other Staffing Profile Features*
- *Assigning Resource Pool Resources*
  - *Collecting Resource Requests*
  - *Making Assignments*
  - *Rejecting and Forwarding Demand*
- *Analyzing Resource Pools*
  - *Comparing Resource Pools to Staffing Profiles*

- *Analyzing Staffing Profiles*
    - *Automatic Tracking of Actuals for Staffing Profiles*
    - *Comparing a Project's Assignments to its Staffing Profile*
- 

## Overview of Using Resource Management for Capacity Planning

Resource capacity planning consists of the following activities:

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

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

- **Staffing profiles.** Staffing profiles allow a manager to plan the future allocation of resources, broken down by role. This lets the user see what kinds of resources and roles they will need for future work.
- **Resource pools.** Resource pools provide a way to track future resource capacity, broken down by role. This lets the manager see what resources and roles will be available to apply to future work.

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

1. Resource managers create resource pools that define resource capacity. See *Planning Capacity with Resource Pools on page 47* for details on creating resource pools.
2. Project managers create staffing profiles that forecast resource demand. See *Tracking Demand with Staffing Profiles on page 57* for details on staffing profile usage and creation.

3. These staffing profiles spawn resource requests meant for various resource pools. See *Sending Resource Requests from a Staffing Profile* on page 64 for details on resource requests.
4. Resource managers fill these requests by drawing from the specified resource pools to make the actual resource assignments to the originating staffing profiles. Resource managers can also forward requests to another resource pool, or reject resource requests altogether. See *Assigning Resource Pool Resources* on page 69 and *Adjusting Resource Participation Within Resource Pools* on page 52 for details on making assignments to staffing profiles from resource pools.

Resource managers can load balance resources from their pools across the staffing profiles requesting resources. They can also examine the utilization of resources on projects. See *Analyzing Staffing Profiles* on page 75 and *Analyzing Resource Pools* on page 71 for details on this process.

## Planning Capacity with Resource Pools

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

*Table 4-1. Resource pool features (page 1 of 2)*

Feature	Options
Lines on a resource pool can represent	<ul style="list-style-type: none"> <li>■ Resources</li> <li>■ Roles</li> <li>■ (both)</li> </ul>
A resource pool can contain capacity forecasts out to	<ul style="list-style-type: none"> <li>■ 3 months</li> <li>■ 6 months</li> <li>■ 9 months</li> <li>■ 1 year</li> <li>■ 2 years</li> <li>■ 3 years</li> </ul>

Table 4-1. Resource pool features (page 2 of 2)

Feature	Options
Resource capacity can be split by	<ul style="list-style-type: none"> <li>■ Week</li> <li>■ Month</li> <li>■ Quarter</li> <li>■ Year</li> </ul>
Resource capacity totals can be shown in	<ul style="list-style-type: none"> <li>■ Hours</li> <li>■ Full Time Equivalents (FTE)</li> </ul>

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

Table 4-2. Resource pool attributes

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

## Using Resource Pools: General Walkthrough

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

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

- Reassigning staffing assignments to other resources
- Adding resources to the resource pool
- Transferring resources to another resource pool
- Modifying a resource's level of participation across multiple resource pools

## Creating a Resource Pool

To create a resource pool:

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

The Create a New Resource Pool page opens.

Create a New Resource Pool

Pool Name:

Description:

Pool Manager:

---

This Resource Pool is for:

Primary Organization Unit:

Freestanding

---

Region:

Parent resource Pool:

3. Complete the required fields and any optional fields.

At this point, you should decide the following:

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

4. Click **Create**.

The Resource Pool page opens.

5. Add lines to the resource pool.

a. Click **Manage Pool Capacity**.

The Manage Pool Capacity page opens.

Manage Pool Capacity: Shared Developers Done

---

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

[Add New Resource](#) [Add Unnamed Headcount](#)

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

[Manage Participation](#)

[Export Resource Pool](#)

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

Done

b. Click the links below the resource pool name.

- **Show Pool for the Next** specifies the amount of time the resource pool will cover.
- **Show Resource Capacity In** determines the time period breakdown.
- **Show Totals In** sets the units in which to count allocations.

- c. Add a resource or role.
  - To add a resource, click **Add New Resource** to specify a resource and the resource’s start date for the resource pool.
  - To add a role, click **Add Unnamed Headcount** to specify a role and the required hours for the role.

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

- d. Repeat as necessary.
  - e. Click **Done**.
6. The Resource Pool page opens.

## Viewing Resource Pools

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

Figure 4-1. Resource Pool List portlet

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

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

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

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

Figure 4-2. Browse Resource Pools page

Browse Resource Pools

[Export to Excel](#)

Select a Resource Pool Showing 1 to 7 of 7

Name	Resource Pool Manager	Primary Organization Unit	Description
Global	Bridget Holbrook; Admin User		
Shared Developers	Bridget Holbrook	Applications	
Apps Pool	Bridget Holbrook		
Long Term Contractors/Consultants	Bridget Holbrook		
QA Engineers	Bridget Holbrook		
Shared DBAs	Bridget Holbrook		
Offshore Partner A	Pramod Manon	Offshore Partner A	Offshore resources

Showing 1 to 7 of 7

[Create New Resource Pool](#)

## Adjusting Resource Participation Within Resource Pools

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

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

1. Open a resource pool.
2. In the Resource Pool page, click **Manage Pool Capacity**.

The Manage Pool Capacity page for the resource pool opens.

Manage Pool Capacity: Shared Developers Done

---

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

Add New Resource Add Unnamed Headcount

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

Manage Participation Done

[Export Resource Pool](#)

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

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

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

Manage Resource Pool Participation: Brandi Greer

Resource Pool	Effective Date	Effective Date	Effective Date
	Aug 11, 2006	Jul 27, 2006	Jan 1, 2006
Shared Developers		100	100
Apps Pool		100	
Shared DBAs	100		
Non-Work Load	0	0	0
<b>Total (Must be 100%)</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">Edit</a>

Add Participation Done

- Click **Modify Participation**.

The Modify the Resources Participation Across Resource Pools dialog box opens.

Resource Pool	% of Time
<input checked="" type="checkbox"/> Shared Developers	
<input checked="" type="checkbox"/> Apps Pool	
<input checked="" type="checkbox"/> Shared DBAs	
Non-Work Load	
<b>Total (Must be 100%)</b>	<b>100</b>

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

- Click **Done**.

The Manage Resource Pool Participation page opens.

- Click **Done**.

The Manage Pool Capacity page opens.

- Click **Done**.

The Resource Pool page opens.

## Resource Pool Security

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

### *Resource Pool Access Grants*

Users are linked to access grants through the security groups to which they belong. The access grants related to resource pools are discussed in more detail in [Table 4-3](#). Without these access grants, a user cannot view or edit a resource pool regardless of whether they are specified in the list on the resource pool's

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

Table 4-3. Resource pool access grants

Access Grant	Description
View Resource Pools	The user can view any resource pool for which they are on the Configure Access page list.
View All Resource Pools	The user can view any resource pool in the system, even if they are not listed in the View or Edit list.
Edit Resource Pools	The user can edit any resource pool for which they are on the specified Edit list.
Create Resource Pools	The user can create new resource pools. Supplemental to the Edit Resource Pools or Edit All Resource Pools access grant.
Edit All Resource Pools	The user can edit any resource pool in the system.
Edit All resources	The user can edit any resource in the system. This access grant is needed to modify resource participation across resource pools.
Edit only resources that I manage	The user can edit any resource they manage. This access grant is needed to modify resource participation across resource pools.

### ***Resource Pool Configure Access Page***

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



Note

Without the proper access grants, a user cannot view or edit a resource pool regardless of whether they are specified in the list on the resource pool's Configure Access page. See [Resource Pool Access Grants on page 53](#) for more detailed information.

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

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

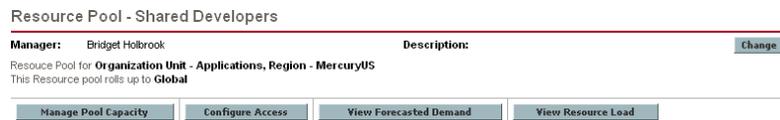
Option	Description
View Access	The user can view the resource pool but not edit its information. Any user listed has View access.
Edit Header	The user can edit the resource pool's header information, but nothing else.
Edit Unnamed Headcount	The user can edit the lines in the resource pool that specify roles, but nothing else.
Edit Security	The user can use the Configure Access page to edit viewing or editing security for the resource pool.

## Using the Configure Access Page

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

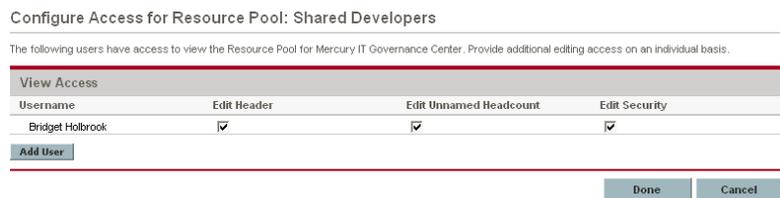
1. Open the Resource Pool page.

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



2. Click **Configure Access**.

The Configure Access for Resource Pool page opens.



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

Configure Access for Resource Pool: Shared Developers

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			
Username	Edit Header	Edit Unnamed Headcount	Edit Security
Bridget Holbrook	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Carolyn Sayer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Allen Zumwalt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Gina Anderson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Granting Edit access automatically grants the user View access. See *Table 4-4 on page 55* for more detailed information on each option.

5. Click **Save**.

## Rolling Up Resource Pool Information

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

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

- The View Resource Pool page displays related resource pools.

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

Related Resource Pools		
Resource Pool	Relationship	Primary Organization Unit
Global	Parent	

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



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

## Tracking Demand with Staffing Profiles

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

- Staffing profiles can be linked to organization units, projects, proposals, or assets, to tie them to business functions and facilitate meaningful comparison visualizations.
- If the staffing profile is meant to represent workload, the **Workload Category** field allows you to categorize it as such.
- New lines in the staffing profile can be set to automatically fill in the Resource Pool value using the **Default Resource Pool** field.
- These staffing profile positions are then treated as assignments when visualizing operational capacity. See [Visualizing Assignments on page 101](#) for more details.
- Staffing profile lines can also track actual values.
- Staffing profiles can be synchronized with budgets; lines in the staffing profile become planned labor lines in the associated budget.

Figure 4-4. Staffing profile

[View Audit Trail](#)

Staffing Profile:ERP Upgrade Done

[Configure Access](#) [Change Header](#)

**This staffing profile is for Project - [ERP Upgrade](#)**      **Status:** Active

**Description:**

**Created On:** Jul 27, 2006      **Created By:** Carolyn Sayer

**Work Load Category:**      **Region:** MercuryUS

**Profile Start:** Jan 1, 2006      **Profile Finish:** Dec 31, 2006      **Default Resource Pool:**

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

[Add A Position](#)   [Send Resource Requests](#)   [Compare to Work Plan](#)

Position	Status	Resource Pool	Q1 '06			Q2 '06			Average FTE's Requested
			Jan	Feb	Mar	Apr	May	Jun	
DBA	Soft Booked	Long Term Contractor...	2.00	2.00	2.00	2.00	2.00	2.00	2.00
Richard Gomez	Soft Booked	Long Term Contractor...	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Dennis Morrison	Committed	Long Term Contractor...	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Network Administrator	Requested	Shared Developers	0.25	0.25	0.25	0.25	0.25	0.25	0.25
Traci Shimizu	Committed	Shared Developers	0.25	0.25	0.25	0.25	0.25	0.25	0.14
<b>Unmet Demand</b>									0.11
QA Engineer	Partially Assigned	Offshore Partner A				1.00	1.00		1.75
Marjole Olive	Committed	QA Engineers				1.00	1.00		0.75
Nancy Giddings	Committed	QA Engineers							0.25
<b>Unmet Demand</b>									0.75
Senior Developer	Soft Booked	Shared Developers	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Holly Haywood	Soft Booked	Shared Developers	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Larry X. Veach	Committed	Shared Developers	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Raymond Ackley	Committed	Shared Developers	1.00	1.00	1.00	1.00	1.00	1.00	1.00
<b>Period Total</b>			<b>5.25</b>	<b>5.25</b>	<b>5.25</b>	<b>6.25</b>	<b>6.25</b>		<b>7.00</b>

Check all      <      >

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

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

[Export Staffing Profile](#)

Notes

[Add Notes](#)

Done

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

Table 4-5. Staffing profile attributes (page 1 of 3)

Field Name	Description
<b>Staffing Profile Header Information</b>	
Name	The name of the staffing profile.
Description	A description of the staffing profile.
Manager	The user responsible for the staffing profile
Start Period	The starting period (a fiscal month) for the staffing profile.
End Period	The ending period (a fiscal month) for the staffing profile.

Table 4-5. Staffing profile attributes (page 2 of 3)

Field Name	Description
Status	The status of the staffing profile. Possible values: <b>In Planning, Active, Completed, Cancelled</b>
Region	The geographic region in which the staffing profile is used; determines holiday schedule.
Workload Category	The category of work being tracked by the staffing profile.
This staffing profile should show as work load	If selected, the Full Time Equivalents set in the staffing profile will be counted as actual work assignments in the Resource Management Analyze Assignment Load capacity visualization.
This is a ___ Staffing Profile	Defines whether the staffing profile is associated with an <b>Asset, Organization Unit, Proposal, or Freestanding.</b>
Default Resource Pool	When adding a line to the staffing profile, the <b>Resource Pool</b> field will be automatically defaulted with this value.
Synchronized with Budget	Defines whether the staffing profile lines are rolling up to a budget.
Budget Name	The name of the budget the staffing profile is synchronized with.
Created On	The date the staffing profile was created.
Created By	The user who created the staffing profile.
<b>Allocation Detail</b>	
<b>Add a Position</b>	Opens a window allowing you to add a line to the staffing profile.
<b>Send Resource Requests</b>	Requests for resources appear in the resource request queue of the resource pool. Resource managers can then make assignments to the staffing profile.
<b>Compare to Work Plan</b>	Opens the Analyze Staffing for Project page, which compares staffing profile allocations to work plan assignments. This is only useful for staffing profiles that are attached to projects.
<b>Configure Access</b>	Allows you to configure access to the staffing profile.
Enter Allocation In	Allows you to choose the time period breakdown for the staffing profile. Possible values: <b>Weeks, Month, Quarters, Year</b>

Table 4-5. Staffing profile attributes (page 3 of 3)

Field Name	Description
FTE/Hours	Allows you to choose between entering allocations in Full Time Equivalents (FTE) or hours.
Position	The position defines the needed role, skills, and additional resource attributes, along with the forecasted resource FTEs and any named assignments made.
Status	The status of the position's assignment.
Resource Pool	The resource pool the position draws from.
Period Total	The total Full Time Equivalents for each month being projected in the staffing profile.
Add Notes	Allows you to add any notes on the staffing profile itself.

## Using Staffing Profiles: General Walkthrough

When putting together a project, the project manager should create a staffing profile, which allows her to plan resource usage for that project. Each line in the staffing profile represents a position for a resource with a specific role that needs to be filled. When the project manager is finished making her resource usage forecasts, she sends them to the resource manager as resource requests from her staffing profile. Each resource request is submitted against a specific resource pool. See [Sending Resource Requests from a Staffing Profile on page 64](#) for more details on this process.

The resource manager receives these resource requests as alerts on the Resource Pool Overview page for a resource pool he manages, and proceeds to the relevant staffing profile to begin making assignments. See [Assigning Resource Pool Resources on page 69](#) for more details on this process.



Note

A resource must be in a resource pool in order to be assigned to a staffing profile, and only the resource pool manager (or a manager of a parent resource pool) is permitted to make that assignment.

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

## Creating a Staffing Profile

To create a staffing profile:

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

The screenshot shows the 'Create a Staffing Profile' form with the following fields and values:

- Name: [Empty]
- Description: [Empty]
- Manager: Admin User
- Start Period: [Empty]
- End Period: [Empty]
- Work Load Category: Strategic Projects
- Status: In Planning
- Region: MercuryUS
- This staffing profile should show as work load: Yes (selected), No
- Copy positions from existing staffing profile: [Empty]
- This is a: Freestanding Staffing Profile
- Default Resource Pool: [Empty]
- Synchronized with Budget: No (selected), Yes
- Budget Name: [Empty]

A 'Create' button is located at the bottom right of the form.

4. Fill in all required fields and any optional fields.

At this point, you should decide the following:

- Whether lines in the staffing profile count as workload
- Whether to copy positions from an existing staffing profile, and if so, which one
- Whether the staffing profile is linked to an organization unit, asset, or proposal
- Whether the staffing profile will request resources from a particular resource pool by default, and if so, which one
- Whether the staffing profile's lines will synchronize with a budget, and if so, which one

5. Click **Create**.

The Staffing Profile page opens.

Staffing Profile: Data Architecture Initiative

[Configure Access](#) [Change Header](#)

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

**Description:**

**Created On:** Sep 14, 2006      **Created By:** Admin User

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

**Profile Start:** Sep 1, 2006      **Profile Finish:** Feb 28, 2007      **Default Resource Pool:**

Allocation Detail for Sep 1, 2006 to Feb 28, 2007      Enter Allocation in: [Year](#) | [Quarters](#) | [Month](#) | [Weeks](#)      [FTE](#) | [Hours](#)

[Add A Position](#)      [Send Resource Requests](#)

Position	Status	Resource Pool	Q3 '06				Q1 '07		Average FTE's Requested
			Sep	Oct	Nov	Dec	Jan	Feb	
There are currently no positions forecasted on this profile.									
<b>Period Total</b>			<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>		<b>0.00</b>

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

[Export Staffing Profile](#)

Notes

[Add Notes](#)

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

7. Add lines to the staffing profile.

a. Click **Add A Position**.

The Add Position dialog box opens.

Add Position

Summary | **Advanced**

**Role Required:**       **Resource Type:**

**Label:**       **Resource Pool:**

**Status:**       **Response needed by:**

Assignments Needed Assignments in FTE

Q3 '06		Q4 '06		Q1 '07	
Sep	Oct	Nov	Dec	Jan	Feb
<input type="text"/>					

**Comments:**

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

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

c. (Optional) Fill in any optional fields.

- d. Type the assignments needed for each time period.
- e. Click **Add**.

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

- f. Repeat as necessary.

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

- 8. Click **Done**.

## Viewing Staffing Profiles

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

Figure 4-5. Staffing Profile List portlet

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

Showing 1 to 5 of 27 [Prev](#) [Next](#) [Maximize](#)

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

Figure 4-6. Search Staffing Profiles page

Search Staffing Profiles

Search for Staffing Profile to View

Profile Name contains:  Status:

Staffing Profile For:

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

[Search](#)

## Sending Resource Requests from a Staffing Profile

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

Figure 4-7. Resource pool with unfilled resource requests

Resource Pool - Shared Developers

Manager: Bridget Holtbrook Description: [Change](#)

Resource Pool for Organization Unit - Applications, Region - MercuryUS  
This Resource pool rolls up to Global

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

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

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

Related Resource Pools		
Resource Pool	Relationship	Primary Organization Unit
Global	Parent	

Notes

[Add Notes](#)

[Done](#)

To send assignment requests for your staffing profile:

1. Create a staffing profile with positions.
2. In the Staffing Profile page, click **Send Resource Requests**.  
The Send Assignment Requests dialog box opens.
3. Select the checkbox next to each position for which you want to send an assignment request.
4. Specify a date by which a response should be made in the **Response Needed** date field.
5. Click **Send**.

The assignment requests are sent to the appropriate resource pools. See [Assigning Resource Pool Resources on page 69](#) for details on what happens once assignment requests have been made.

## Staffing Profile Security

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

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

### Staffing Profile Access Grants

Users are linked to access grants through the security group they are a part of. The access grants related to staffing profiles are discussed in more detail in *Table 4-6*. Without these access grants, a user cannot view or edit a staffing profile regardless of whether they are specified in the list on the staffing profile's Configure Access page, or are a participant in the project the staffing profile is attached to (if any).

- For more information on access grants and security groups, see the *Security Model Guide and Reference*.
- For more information on project and project process participants, see the *Mercury Project Management User's Guide*.

*Table 4-6. Staffing profile access grants (page 1 of 2)*

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.

Table 4-6. Staffing profile access grants (page 2 of 2)

Access Grant	Description
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 <b>Profile Status</b> , but nothing else. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles access grant.

### ***Staffing Profile Configure Access Page***

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



Note

Without the proper access grants, a user cannot view or edit a staffing profile regardless of whether they are specified in the list on the staffing profile's Configure Access page, unless the staffing profile is attached to a project in which the user participates. See [Staffing Profile Access Grants on page 65](#) for more detailed information.

The Configure Access page options are discussed in more detail in [Table 4-7](#).

Table 4-7. Security options for Staffing Profile Configure Access page

Option	Description
View Access	The user can view the staffing profile but not edit its information. Any user listed has View access.
Edit Header	The user can edit the fields in the staffing profile header section, but not the staffing profile lines, nor change periods.
Edit Positions	The user can edit the staffing profile lines, but nothing else.
Edit Assignment Actuals	The user can edit actuals on staffing profile lines, but nothing else.
Edit Security	The user can use the Configure Access page to edit viewing or editing security for the staffing profile.

### Using the Configure Access Page

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

1. Open the staffing profile.

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

2. Click **Configure Access**.

The Configure Access for Staffing Profile page opens.

Configure Access for Staffing Profile: ERP Upgrade

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	Edit Header	Edit Positions	Edit Assignment Actuals	Edit Security
Project Participants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teju Krishna	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Joseph Banks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

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

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

5. Click **Save**.

## Using Other Staffing Profile Features

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

### *Staffing Profiles and Portfolio Management*

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

### *Default Organization Units for Staffing Profiles*

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

### *Synchronizing Budgets and Staffing Profiles*

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

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

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

To synchronize a staffing profile with a budget:

1. Open an existing staffing profile and click **Change Header**.
2. Select the **Yes** option for **Synchronized with Budget**.
3. In **Budget Name**, choose a budget.
4. Click **Done**.

## Assigning Resource Pool Resources

When a staffing profile is created, its positions represent needed roles without resources specified. After creating a staffing profile, a project manager can send resource assignment requests from the staffing profile to the various resource pools specified in each staffing profile position (see *Sending Resource Requests from a Staffing Profile on page 64* for details). The resource manager can then review the assignment requests for each resource pool and go into each staffing profile, making the appropriate assignments for each line.

## Collecting Resource Requests

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

Figure 4-8. Resource pool with unfilled resource requests

Resource Pool - Shared Developers

Manager: Bridget Holtbrook Description: [Change](#)

Resource Pool for **Organization Unit - Applications, Region - MercuryUS**  
This Resource pool rolls up to **Global**

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

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

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

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

Related Resource Pools

Resource Pool	Relationship	Primary Organization Unit
Global	Parent	

Notes

[Add Notes](#)

[Done](#)

## Making Assignments

To fill a resource assignment request:

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

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

3. Assign one or more resources in either of the following ways:
  - Click **Assign** to assign one or more resources.
  - Click the Resource Finder icon to search for a suitable resource using the Resource Finder.

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

4. Make any changes to the resource's commitment to the staffing profile line.
  - You can change the nature of the resource's commitment between **Soft Booked** and **Hard Booked**, or you can remove it entirely.
  - You can change the number of hours committed to the staffing profile.
5. Click **Done**.

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



A resource must be in a resource pool in order to be assigned to a staffing profile, and only the resource pool manager (or a manager of a parent resource pool) is permitted to make that assignment.



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

## Rejecting and Forwarding Demand

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

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

To reject unmet resource demand for a staffing profile line:

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

The Reject Request for Unmet Demand dialog box opens.

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

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

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

The Forward Request to Another Pool dialog box opens.

3. Specify a resource pool in the **Forward to Resource Pool** field.
4. Supply a reason for forwarding the resource demand in the **Comments** field and click **Done**.

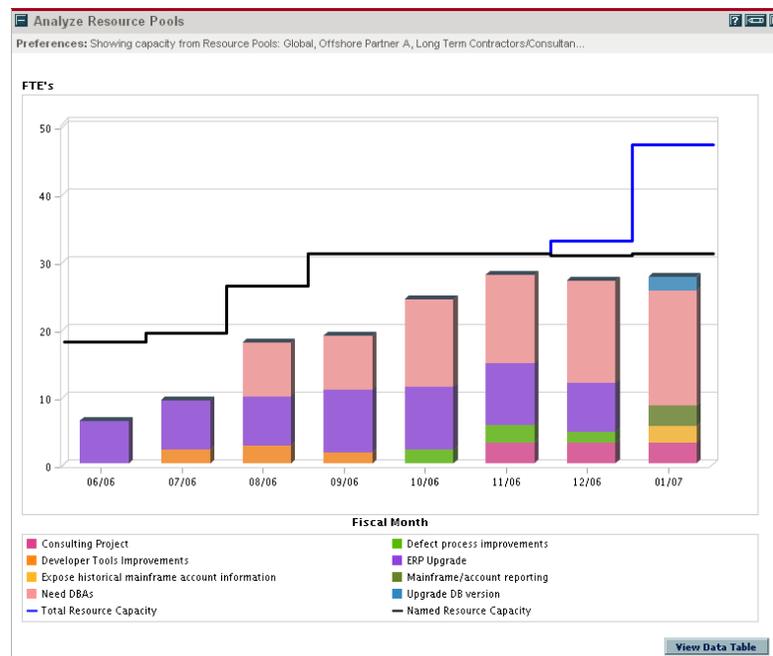
## Analyzing Resource Pools

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

## Comparing Resource Pools to Staffing Profiles

The Analyze Resource Pools portlet provides a way to assess planned load on resource pools by directly comparing the projected demand in a staffing profile or Profiles to projected capacity in a resource pool or pools.

Figure 4-9. Analyze Resource Pools portlet



Key features of the Analyze Resource Pool portlet include:

- The black line represents the total capacity of the resource pool or pools being analyzed
- Bars on the chart represent resource allocations from staffing profiles by period, which can be split internally by staffing profile or status

The Analyze Resource Pools portlet can be filtered using the parameters described in [Table 4-8](#).

Table 4-8. Analyze Resource Pools portlet - parameters

Field Name	Description
<b>Filter By</b>	
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 <b>Workload Category</b> to display.
Include (only) Lines from Resource Pools and Staffing Profiles with Specific Role	A multi-select auto-complete field that selects a role or set of roles to display from the resource pools and staffing profiles being analyzed.
<b>Time Period</b>	
Period	Display only. Shows the time period being used by the Analyze Resource Pools portlet.
Display (x) past periods	Selects up to 20 time periods before the current date to include in the Analyze Resource Pools portlet. Useful for viewing historical trends.
Display (x) future periods	Selects up to 20 time periods after the current date to include in the Analyze Resource Pools portlet.
<b>Arrange Data</b>	
Group By	Determines whether to display the results by <b>Staffing Profile</b> or <b>Assignment Status</b> .

To get a breakdown of total resource capacity vs. load by staffing profile, click **View Data Table**. The Analyze Resource Pools Breakdown table opens in a new window.



Note

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

Figure 4-10. Analyze Resource Pools Breakdown table

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

Resource Pool Details (FTEs)									
	Q2 '06		Q3 '06		Q4 '06			Q1 '07	
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	
Named Resources	18	19.35	26.22	31	31	31	30.8	31	
Unnamed Resources	0	0	0	0	0	0	2.1	16.09	
<b>Total Capacity</b>	<b>18</b>	<b>19.35</b>	<b>26.22</b>	<b>31</b>	<b>31</b>	<b>31</b>	<b>32.9</b>	<b>47.09</b>	
<b>Total Forecast</b>	<b>6.25</b>	<b>9.26</b>	<b>17.86</b>	<b>18.9</b>	<b>24.26</b>	<b>27.86</b>	<b>26.9</b>	<b>27.56</b>	
Soft Booked	2	2	3.3	4	5.29	5.43	5.1	2	
Committed	4.25	4.21	7.71	11	8.57	9.43	8.05	5.5	
<b>Total Assignments</b>	<b>6.25</b>	<b>6.21</b>	<b>11.01</b>	<b>15</b>	<b>13.86</b>	<b>14.87</b>	<b>13.15</b>	<b>7.5</b>	
Unmet Demand	1	4.05	7.85	7.25	12.4	14.99	14.75	20.06	
Remaining Capacity	11.75	13.14	15.21	16	17.14	16.13	19.75	39.59	
<b>Breakdown By Role</b>									
<b>Developer - Interactive D...</b>									
Named	3	3	3.52	4	4	4	4	4	
Unnamed	0	0	0	0	0	0	0	5	
<b>Total</b>	<b>3</b>	<b>3</b>	<b>3.52</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>9</b>	
<b>Forecast Total</b>	<b>0</b>	<b>1.15</b>	<b>1.74</b>	<b>0.55</b>	<b>1.15</b>	<b>1.74</b>	<b>0.55</b>	<b>0</b>	
Developer Tools Impr...	0	1.15	1.74	0.55	0	0	0	0	
Defect process impr...	0	0	0	0	1.15	1.74	0.55	0	
<b>Assigned Total</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>0.55</b>	<b>0</b>	
Developer Tools Impr...	0	0	1	2	0	0	0	0	
Defect process impr...	0	0	0	0	1	1	0.55	0	
<b>Database Administrator</b>									
Named	6	7.1	9.04	10	10	10	9.8	10	
Unnamed	0	0	0	0	0	0	2.1	6.09	

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

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

## Analyzing Staffing Profiles

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

### Automatic Tracking of Actuals for Staffing Profiles

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



Note

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

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

- Actual FTE values are calculated from the Actual Effort tracked on the work plan's tasks. The actual effort values appear only in the Analyze Staffing Profile page.
- The Analyze Staffing Profile page shows the scheduled and actual effort from the project's work plan, grouped by either resource or role.
- When viewing the Analyze Staffing Profile page grouped by resource, if a resource is not yet assigned to a task, the roll-up of scheduled effort will appear in the unassigned collection.
- When viewing the Analyze Staffing Profile page by role, the scheduled and actual effort appears under the role specified on the task.



Note

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

To create a staffing profile for a project:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Search Projects** and open the project you want.
3. Click **Project Settings** and click on the **Cost and Effort** policy.

■ ■ Note

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

4. Select **Staffing Profile** represents the work load imposed by the project.
5. Select **Use actual information from the work plan and Time Management when viewing actuals in the staffing profile**.
6. Click **Save**.
7. In the **Project Staffing** section of the Project Overview page, click **Create a Staffing Profile**.

The Create a Staffing Profile page opens.

8. Fill in required and optional fields and click **Create**.

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

### ***Automatic Tracking of Actuals with Time Management***

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

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

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

**Cost and Effort**

Allow project managers to override these settings?  Yes  No

**Resource Load Settings**

Work Load Category: Strategic Projects

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

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

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

**Scheduled Effort in the Work Plan**

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

Automatically calculate Scheduled Effort  
 Manually enter Scheduled Effort per task assignment  
 Allow override of effort calculation made in the work plan

**Actual Effort in the Work Plan**

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

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

**Time Management**

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

**Track time at the:**

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

Project level  
 Not available when tracking Estimated Remaining Effort

**Allow the following to report time on this project:**

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

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

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

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

Day(s) more  
 Time period(s) more (for time period in which the task is complete, enter 0)  
 Any time  
 Do not allow. Resources cannot log time against a task that is complete.

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

Participant Group: Project Managers  
 Security Group

**Financial Management**

Enable Financial Management for Work Plan

Roll up actual costs from the work plan into the project budget  
 Allow capitalized costs on this project

**Planned costs will be:**

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

**Actual labor cost will be:**

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

Once Time Management is activated for the project, the Actual Effort values entered will roll up into the staffing profile, assuming the staffing profile is set properly (see [Automatic Tracking of Actuals for Staffing Profiles](#) on page 75).

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

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Search Projects** and open the project you want.
3. Click **Project Settings** and click on the **Cost and Effort** policy.



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

4. Select **Use Time Management to track actual effort against this project**.
5. Select the appropriate level of the work plan to track.
6. Click **Save**.

## Comparing a Project's Assignments to its Staffing Profile

The Analyze Staffing for Project page, pictured in 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 work plan and actuals to organizationally agreed-upon staffing levels for the project. Open it by clicking **Compare to Work Plan** in the Staffing Profile page.

Figure 4-12. Analyze Staffing for Project page

Analyze Staffing For Project ERP Upgrade Done

View By: Role | Resource

Staffing Details by Resources (Shown in Hours)

Resource (Position)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Brandi Greer</b>												
Assigned												
Scheduled Effort						40.0		16.0				
Actual Effort												
<b>Dennis Morrison (DBA)</b>												
Assigned	168.0	152.0	184.0	160.0	176.0	176.0	160.0	184.0	160.0	176.0	168.0	160.0
Scheduled Effort							8.0	24.0				
Actual Effort												
<b>Holly Haywood (Senior Developer)</b>												
Assigned	168.0	152.0	184.0	160.0	176.0	176.0	160.0	184.0	160.0	176.0	168.0	160.0
Scheduled Effort						32.0	176.0	8.0				
Actual Effort												
<b>Jason Swain</b>												
Assigned												
Scheduled Effort								80.0				
Actual Effort												
<b>Larry X. Veach (Senior Developer)</b>												
Assigned	168.0	152.0	184.0	160.0	176.0	176.0	160.0	184.0	160.0	176.0	168.0	160.0
Scheduled Effort						120.0	48.0	8.0				
Actual Effort												
<b>Leslie Franklin</b>												
Assigned												
Scheduled Effort								24.0				
Actual Effort												
<b>Marjole Olive (QA Engineer)</b>												
Assigned				160.0	176.0	176.0	160.0	184.0	160.0	176.0	168.0	160.0
Scheduled Effort							120.0					
Actual Effort												
<b>Nancy Giddings (QA Engineer)</b>												
Assigned									160.0	176.0	168.0	
Scheduled Effort							208.0	32.0				
Actual Effort												
<b>Pamela Stewart</b>												
Assigned												
Scheduled Effort					40.0	64.0	64.0					
Actual Effort												

Done

The Analyze Staffing for Project page 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.





## Using Resource Management for Work Plan and Request Execution

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### In This Chapter:

- *Overview of Using Resource Management for Work Plan and Request Execution*
  - *Configuring Requests for Resource Management*
  - *Assigning Requests*
  - *Assigning Tasks*
    - *Associating Roles with Tasks*
    - *Assigning Resources to Tasks*
    - *Booking Multiple Resources on a Task*
    - *Comparing Project Capacity to Work Plan Load*
  - *Using the Resource Finder*
    - *Searching for a Resource*
    - *Viewing Resource Load*
    - *Comparing Skills*
    - *Adjusting Resource Finder Calculations*
  - *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 Work Plan and Request Execution

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.** Project or team 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 57](#) for more information on staffing profiles.

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

## Configuring Requests for 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 Name	Description
Workload/Non Workload	Whether the request work item is counted as load against the assigned resource's capacity.
Workload Category	The reporting category of the request work item.
Scheduled Start Date	The scheduled start date for the request work item.
Scheduled Finish Date	The scheduled finish date for the request work item.
Scheduled Duration	The scheduled duration for the request work item.
Scheduled Effort	The scheduled effort for the request work item.
Assigned Resource	(Already present as the <b>Assigned User</b> .)
Role	The role being used by the <b>Assigned Resource</b> .
% 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 Configuration Guide* 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

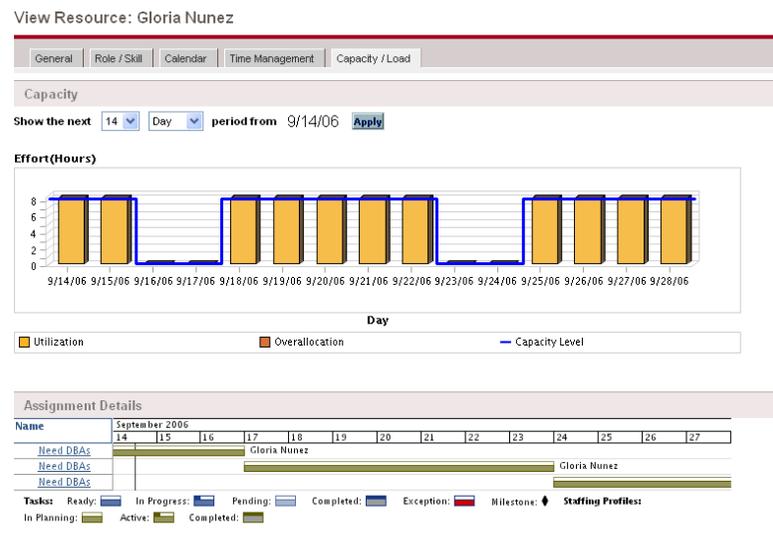
## Assigning Requests

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

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

The request is counted as load against the resource's capacity and will show up in Resource Management visualizations, such as the resource Gantt chart. If the **Workload** flag is enabled, the request will show up in load histograms.

Figure 5-1. View Resource page: Capacity/Load tab



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



Note

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

## Assigning Tasks

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

## Associating Roles with Tasks

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

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

Seq	Name	Scheduled Start	Scheduled Effort	Remaining Effort	Predecessors	Resources	Role	Actions
1	ERP Service Pack - Sept 2006	4/06	262...			Joseph Ba...		
2	Requirements	6/06	90.00					
3	Conduct Requirements Interviews	2/06	40.00	0.00		Calvin Wu	Business Analyst	
4	Consolidate Findings	7/06	24.00	0.00	3	Calvin Wu	Business Analyst	
5	Sizing Estimates	8/06	8.00	0.00	4	Finn Gill	Developer - Interac...	
6	Requirements Review	5/06	10.00	0.00	4FS+5	William Klei...	Business Analyst	
7	Standards audit	6/06	8.00	8.00			Business Analyst	
8	Scope Determined	6/06	0.00	0.00	6, 7			
9	Prototyping	7/06	108...		8			
10	Transaction management	7/06	40.00	0.00		Finn Gill	Developer - Interac...	
11	New UI widgets	7/06	16.00	0.00		Finn Gill	Developer - Interac...	
12	installer options	7/06	8.00	8.00				
13	navigation paths	7/06	8.00	0.00		Gloria Nun...		
14	Common components	7/06	16.00	0.00	10	Finn Gill	Developer - Interac...	
15	Demo prototypes	7/06	20.00	0.00	10, 11, 14	Calvin Wu...	Developer - Interac...	
16	Development	4/06	40.00	0.00	9	Finn Gill		
17	Internal QA							

To book a role for a task:

1. Open the work plan.
2. Double-click the task to which you want to assign a role.

The Task Details page opens.

3. Click the **Resources** tab.
4. Provide a value in the **Assigned Role** field.
5. Click **Save**.

## Assigning Resources to Tasks

Setting a resource as the **Resource** for a task automatically books that resource for the task.

Booking a resource for a task also books that resource's primary role.

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

1. Open the work plan.
2. Double-click the task to which you want to assign a role.

The Task Details page opens.

3. Click the **Resources** tab.
4. Provide a value in the **Assigned Role** field.
5. Click **Save**.

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

The Resource Finder can also be used to find the most appropriate resource to complete the task. The Resource Finder scores resources based on role and skill suitability and availability. See *Using the Resource Finder* on page 90 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 work plan.
2. Double-click the task to which you want to assign a role.

The Task Detail page opens.

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

Repeat as necessary.

5. Click **Save**.

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

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

1. Open the work plan.
2. Double-click the task to which you want to assign a role.

The Task Detail page opens.

3. Click the **Resources** tab.
4. Click **Change to Manual Control**.
5. For each resource, type a value in the **Scheduled Effort** numeric field.

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

6. Click **Save**.

## Comparing Project Capacity to Work Plan Load

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

## Analyze Staffing for Project

The Analyze Staffing for Project page displays a data table for a staffing profile that can be broken down by role or resource.

Figure 5-3. Analyze Staffing for Project page

Analyze Staffing For Project ERP Upgrade Done

View By: Role | Resource

Staffing Details by Resources (Shown in Hours)

Resource (Position)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Brandi Greer</b>												
Assigned												
Scheduled Effort						40.0		16.0				
Actual Effort												
<b>Dennis Morrison (DBA)</b>												
Assigned	168.0	152.0	184.0	160.0	176.0	176.0	160.0	184.0	160.0	176.0	168.0	160.0
Scheduled Effort							8.0	24.0				
Actual Effort												
<b>Holly Haywood (Senior Developer)</b>												
Assigned	168.0	152.0	184.0	160.0	176.0	176.0	160.0	184.0	160.0	176.0	168.0	160.0
Scheduled Effort						32.0	176.0	8.0				
Actual Effort												
<b>Jason Swain</b>												
Assigned												
Scheduled Effort								80.0				
Actual Effort												
<b>Larry X. Vesch (Senior Developer)</b>												
Assigned	168.0	152.0	184.0	160.0	176.0	176.0	160.0	184.0	160.0	176.0	168.0	160.0
Scheduled Effort						120.0	48.0	8.0				
Actual Effort												
<b>Leslie Franklin</b>												
Assigned												
Scheduled Effort								24.0				
Actual Effort												
<b>Marjole Olive (QA Engineer)</b>												
Assigned				160.0	176.0	176.0	160.0	184.0	160.0	176.0	168.0	160.0
Scheduled Effort							120.0					
Actual Effort												
<b>Nancy Giddings (QA Engineer)</b>												
Assigned									160.0	176.0	168.0	
Scheduled Effort							208.0	32.0				
Actual Effort												
<b>Pamela Stewart</b>												
Assigned						40.0	64.0	64.0				
Scheduled Effort												
Actual Effort												

Done

The table shows a different set of details depending on which is chosen, listed in [Table 5-2](#).

Table 5-2. Details available in Analyze Staffing for Project page

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

Open the Analyze Staffing for Project page by clicking **Compare to Work Plan** in the Staffing Profile page.

### ***Work Plan Resource Usage View***

The Resource Usage page for work plans allows you to view the load placed on each resource by the work plan, broken down by task by day. Open the Resource Usage page by clicking **Actions** at the top of the Work Plan page and selecting **Resource Usage**. For more details on the Resource Usage page, see the *Mercury Project Management User's Guide*.

## **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 positions

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

*Figure 5-4. 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 may display some results in grey. These are resources that belong to a resource pool you do not manage. These resources can be viewed in the Resource Finder, but not assigned.

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

Figure 5-5. Resource Finder

Search Resource Availability

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

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

0 1 25 50 75 100 Over Resource Not Enabled

[View Resource Load](#) [Compare Skills](#)

Resources displayed in grey belong to a Resource Pool that is managed by someone else. Showing 1 to 3 of 3 [Prev](#) [Next](#)

Refine Search Criteria and Search Again

\*Availability within dates:  To:

Search for resources with all of the following skills:

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

[Add Skill](#)

Only show results with a Suitability Score greater than:  %

Resource Name:  Resource Category:

Role:  Location:

Resource Pool:  Department:

Organization Unit:

Sort By:   Ascending  Descending \*Results Displayed Per Page:

[Search](#)

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

Field/Buton Name	Definition
<b>Resource Results</b>	
<b>(checkbox)</b>	Selecting this option keeps the selected resource at the top of the Resource Finder when paging through or revising the search.
Resource Name	The name of the resource. Sortable column.
Suitability Score	A numeric score representing the resource's suitability for the entity in question, based on their related role, skills, and availability. The higher this score, the better. See <a href="#">Adjusting Resource Finder Calculations on page 95</a> for more detailed information on how this score is computed.
Availability Score	A numeric score representing the resource's availability for the entity in question, based on their current load and capacity. The higher this score, the better.
Skill Score	A numeric score representing the resource's suitability for the entity in question relative to the skill required.
Projected Utilization	How much the resource would be used if the assignment were made.

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

Field/Button Name	Definition
<b>Check All</b>	Selects the checkboxes next to all resources listed.
<b>View Resource Load</b>	Opens the Resource Load page with data for all selected resources.
<b>Compare Skills</b>	Opens the Compare Skills page with data for all selected resources.
<b>Prev/Next</b>	Moves on to the next or previous set of search results, with the selected resources (if any) retained at the top of the list.
<b>Assign</b>	Enabled when one or more resources are selected. Assigns the selected resource(s) to the entity in question and closes the Resource Finder.
<b>Cancel</b>	Closes the Resource Finder without making changes.
<b>Modify Search Criteria</b>	
Availability Within Dates	Searches for resources available within the selected dates.
Effort	The amount of effort in hours or FTEs required within the available dates. This field only appears on the Resource Finder for tasks and requests.
<b>Delete icon</b>	Removes the skill from the filter list.
Skill	Searches for resources with the selected skill.
Ideal Proficiency	Searches for resources near the selected Proficiency Level.
<b>Add Skill</b>	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 <b>Help</b> icon opens a window describing how the Suitability Score is calculated.
Resource Name	Only displays the selected resources.
Resource Category	Only displays resources in the selected category.
Role	Only displays resources with the selected role.
Location	Only displays resources in the selected location.
Resource Pool	Only displays resources in the selected resource pool.

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

Field/Button Name	Definition
Department	Only displays resources in the selected department.
Organization Unit	Only displays resources in the selected organization unit.
<b>Search Again</b>	Reloads the Resource Finder with search results based on the new criteria.

## Searching for a Resource

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

1. Provide a **Role** for the desired entity.
2. Click the **Resource Finder** icon next to the **Resource** field.

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

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

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

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

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

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

See [Viewing Resource Load](#) or [Comparing Skills](#) for more detailed information.

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

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

## Viewing Resource Load

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

Figure 5-6. Resource Finder Resource Load Breakdown table

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

To access this table:

1. Click **View Resource Load** in the Resource Finder window.  
The Resource Load Breakdown page opens.
2. Click any of the **Highlight** links to highlight over-allocations, availability, both, or neither.
3. Click **Done** to return to the Resource Finder.

## Comparing Skills

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

Figure 5-7. Resource Finder Compare Resource Skills page

Resource Name	Role	Overall Skill Score	Skill Score	Desired Skills	Level
John Groom	Developer - Interactive ...	100%	100%	JSP/Servlets	1
Offshore Developer 2	Developer - Java/Web ...	80%	80%	JSP/Servlets	3
Offshore Developer 3	Developer - Java/Web ...	60%	60%	JSP/Servlets	5

To access this table:

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

The Compare Resource Skills page opens.

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

## Adjusting Resource Finder Calculations

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

- Skill Score
- Role Score
- Availability Score

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

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

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

You can change the Skill Weight and Role weight by altering the appropriate parameters in the `server.conf` file on the Mercury IT Governance Server. [Table 5-4](#) describes the `server.conf` parameters that set the Skill Weight and Role Weight.

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

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

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

- Skill Score = 80
- Role Score = 100
- Availability Score = 60

The following calculation occurs:

$$\text{Availability Weight} = 100 - 25 - 25 = 50$$

$$\text{Suitability Score} = 80 (25\%) + 100 (25\%) + 60 (50\%) = 75$$

## Overriding Scheduled and Actual Values

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

- **Start Date**
- **Finish Date**
- **Duration**
- **Effort**

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

$$\text{Scheduled Duration} = \text{Scheduled Finish Date} - \text{Scheduled Start Date} - (\text{Regional calendar non-working days})$$

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

## Scheduled Value Field Relationships

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

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

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

Each of these fields automatically updates the other:

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



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

Actual field values for work item requests are captured in the following ways:

- **Start Date.** When the work item is started (task is set to **In Progress** or request is submitted)
- **Finish Date.** When the work item is completed (task is set to **Completed** or request is closed)
- **Duration.** Calculated as **Actual Finish Date – Actual Start Date – (Regional calendar non-working days)**
- **Effort.** Calculated as **Total Scheduled Effort \* (Actual Duration / Scheduled Duration)**

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

■ ■ 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.

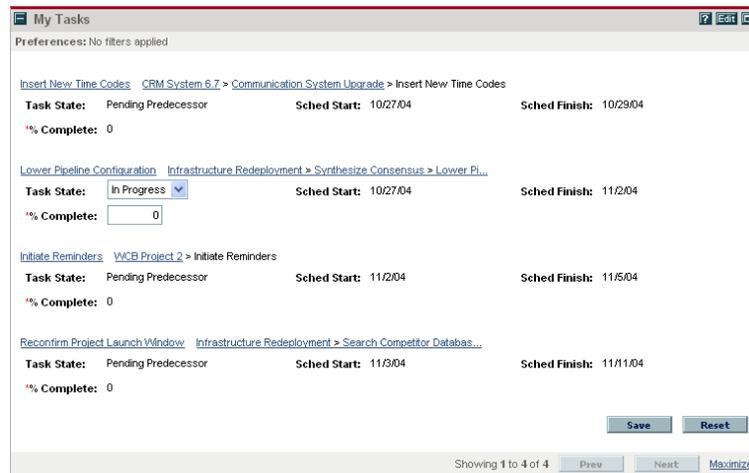
## Viewing Work Items

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 5-8. My Tasks portlet



Resources with a Project Management or Time 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.

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

## My Requests Portlet

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

Figure 5-9. My Requests portlet

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

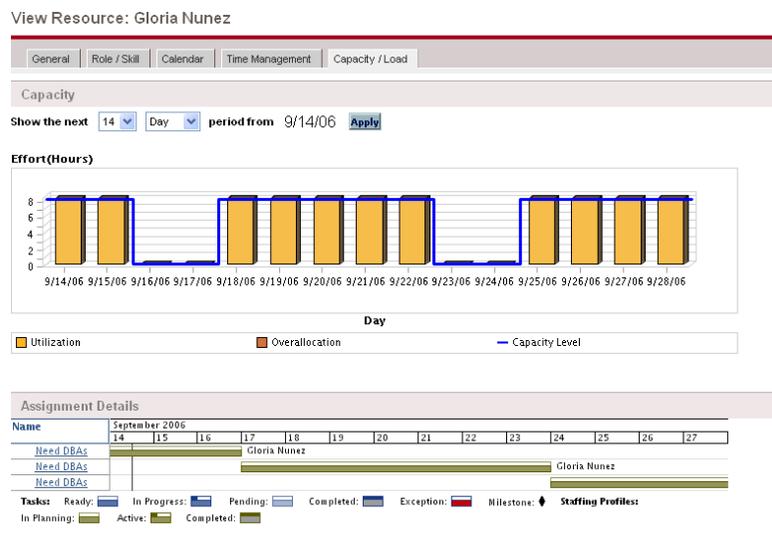
Showing 1 to 4 of 4 [Prev](#) [Next](#) [Maximize](#)

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

## Personal Load and Capacity Visualizations

To see what their upcoming workload looks like, resources with the View my personal resource information only access grant can select **Administration > View My Resource Information** from the menu bar.

Figure 5-10. View Resource page: Capacity/Load tab



Of particular interest are the visualizations in the **Capacity/Load** tab:

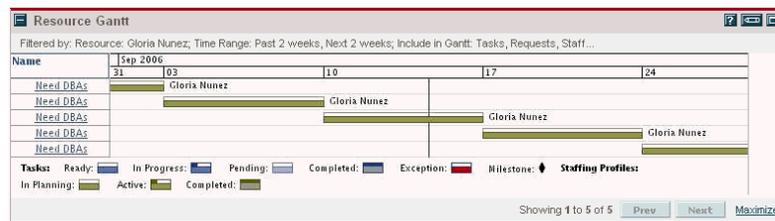
- **Capacity.** Charts the resource's capacity against their current assignments, and shows areas of over-allocation. Non-Workload assignments are omitted.
- **Assignment Details.** A Gantt chart that displays all of the resource's assignments, as well as showing task exceptions.

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

The Analyze Assignment Load portlet 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 101.

The Resource Gantt portlet can be personalized to display only allocations for one resource.

Figure 5-11. Resource Gantt portlet

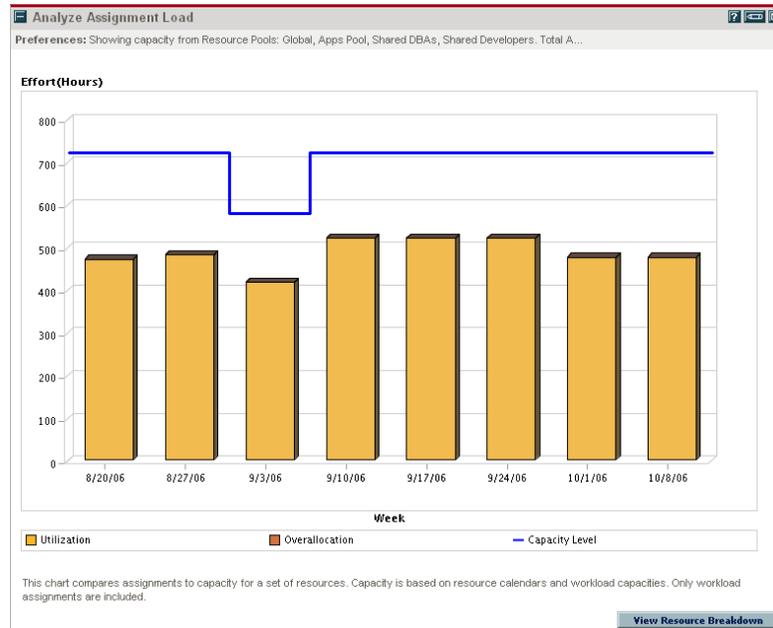


## Visualizing Assignments

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 portlet provides a tool for visualizing assignments that allows a manager to view workload sorted according to different criteria and levels of specificity, giving them better control and visibility over their resources' workload.

Figure 5-12. Analyze Assignment Load portlet



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

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

Field Name	Description
Preferences	
Analyze Capacity from	A choice of multi-select auto-complete fields that selects the sets of resources to display in the Analyze Assignment Load page. Possible choices: <b>Organization Units, Resource Pool, Resources Managed By, Resource Name, Resources on Project</b>
Assignments with Workload Category	Selects assignments of a specific <b>Workload Category</b> to display.
Resources with Role	A multi-select auto-complete field that selects a role or set of roles to display from the sets of resources being analyzed.
Total Assignment Values for	Sets whether to display <b>Scheduled Effort, Actual Effort, or Scheduled and Actual Effort</b> in the Analyze Assignment Load page.

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

Field Name	Description
Time Period	
Period	Sets the time period being used by the Analyze Assignment Load page.
Display __ past periods	Selects up to 20 time periods before the current date to include in the Analyze Assignment Load page. Useful for viewing historical trends.
Display __ future periods	Selects up to 20 time periods after the current date to include in the Analyze Assignment Load page.

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

Figure 5-13. Resource Breakdown table

Resource Load Breakdown - Assignment Summary

View: Assignment Summary | Assignment Details Legend: Over-Allocations Availability

Showing workload breakdown for individual resources by Weeks from Aug 20, 2006 to Oct 13, 2006

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

The Resource Breakdown table itself can be filtered to show different data according to the parameters described in [Table 5-6](#).

Table 5-6. Resource Breakdown table - parameters

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

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



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 33](#).

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