



PeopleSoft Resource Management 8.8 PeopleBook

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About These PeopleBooks

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection web site. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
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Web

From the Documentation section of the PeopleSoft Customer Connection web site, access the PeopleSoft Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
See Also	
	<i>Using PeopleSoft Applications</i>
	<i>PeopleSoft Process Scheduler</i>

PeopleSoft Resource Management Preface

Welcome to the *PeopleSoft Resource Management 8.8 PeopleBook*. This PeopleBook describes how to set up and use PeopleSoft Resource Management.

This preface discusses:

- PeopleSoft application fundamentals.
- Other related PeopleBooks.

PeopleSoft Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook*. Each PeopleSoft product line has its own version of this documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management product lines.

Note. One or more pages in PeopleSoft Resource Management operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook*.

Other Related PeopleBooks

In addition to the *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook*, these companion PeopleBooks also contain information that is used in PeopleSoft Resource Management implementation, setup, or business processes:

- *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*
- *PeopleSoft Enterprise Components 8.8 PeopleBook*
- *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*
- *PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*
- *PeopleSoft Project Costing 8.8 PeopleBook*
- *PeopleSoft Program Management 8.8 PeopleBook*
- *PeopleSoft Services Forecasting 8.8 PeopleBook*
- *PeopleSoft Services Procurement 8.8 PeopleBook*
- *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*
- *PeopleTools PeopleBook: PeopleSoft Application Designer*

- *PeopleTools PeopleBook: PeopleSoft Component Interfaces*
- *PeopleTools PeopleBook: PeopleSoft Integration Broker*
- *PeopleTools PeopleBook: PeopleSoft Optimization Framework*
- *PeopleTools PeopleBook: PeopleSoft Process Scheduler*
- *PeopleTools PeopleBook: PeopleSoft Tree Manager*
- *PeopleTools PeopleBook: Security Administration*
- *PeopleTools PeopleBook: Server Tools Administration*
- *Using PeopleSoft Applications*

CHAPTER 1

Getting Started with PeopleSoft Resource Management

This chapter discusses:

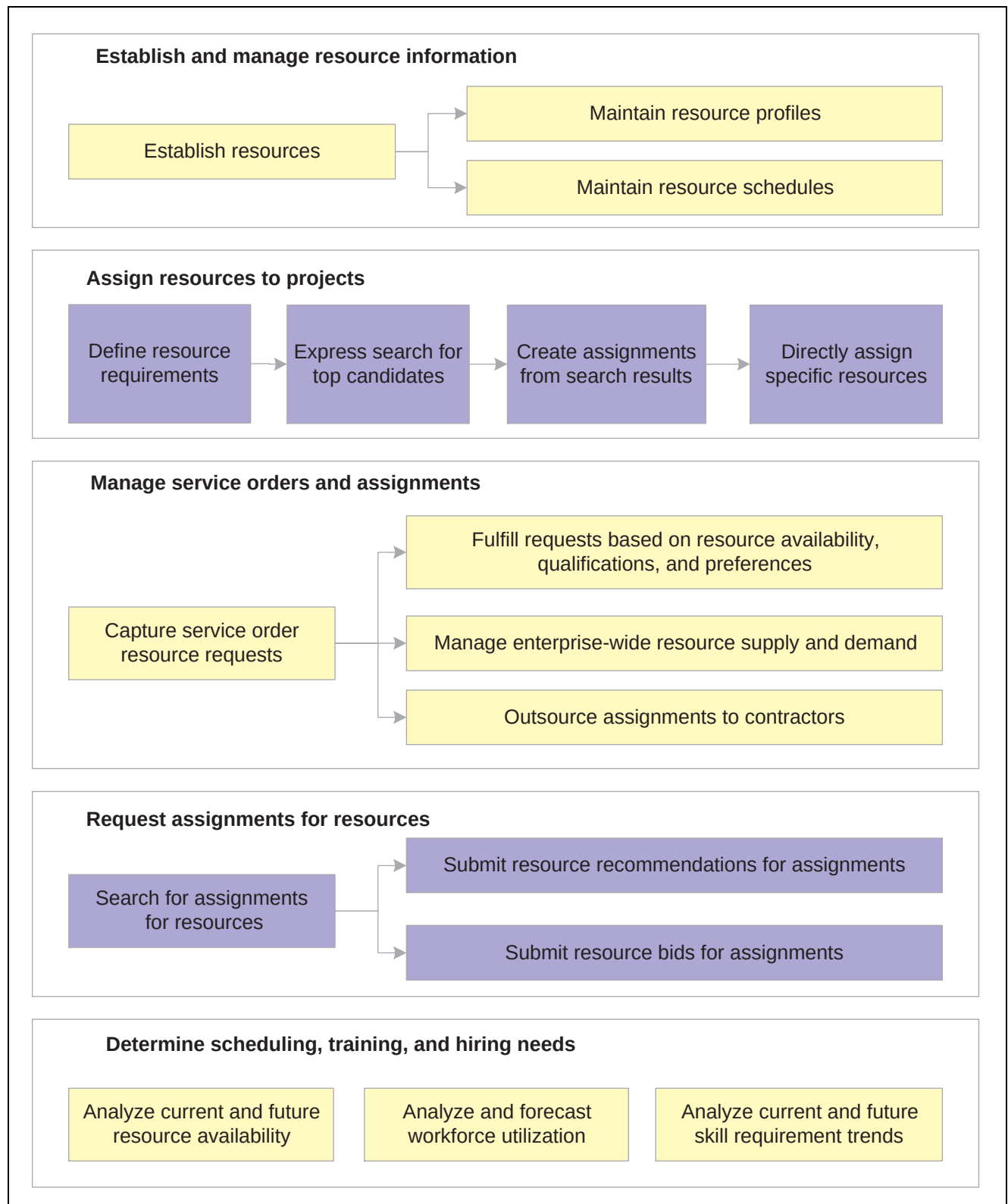
- PeopleSoft Resource Management overview.
- PeopleSoft Resource Management business processes.
- PeopleSoft Resource Management integrations.
- PeopleSoft Resource Management implementation.

PeopleSoft Resource Management Overview

To successfully deliver professional services (or internal services), you must be able to quickly find the right resources for jobs, and you must anticipate resource supply and demand. You also need to provide employees with tools that enable them to shape the direction of their careers. PeopleSoft Resource Management meets these challenges by optimizing resources, managing resource supply and demand, and assisting employees with finding new jobs.

PeopleSoft Resource Management Business Processes

PeopleSoft Resource Management supports the main business process of resource and project portfolio management. The following diagram illustrates the PeopleSoft Resource Management business processes:



PeopleSoft Resource Management business processes

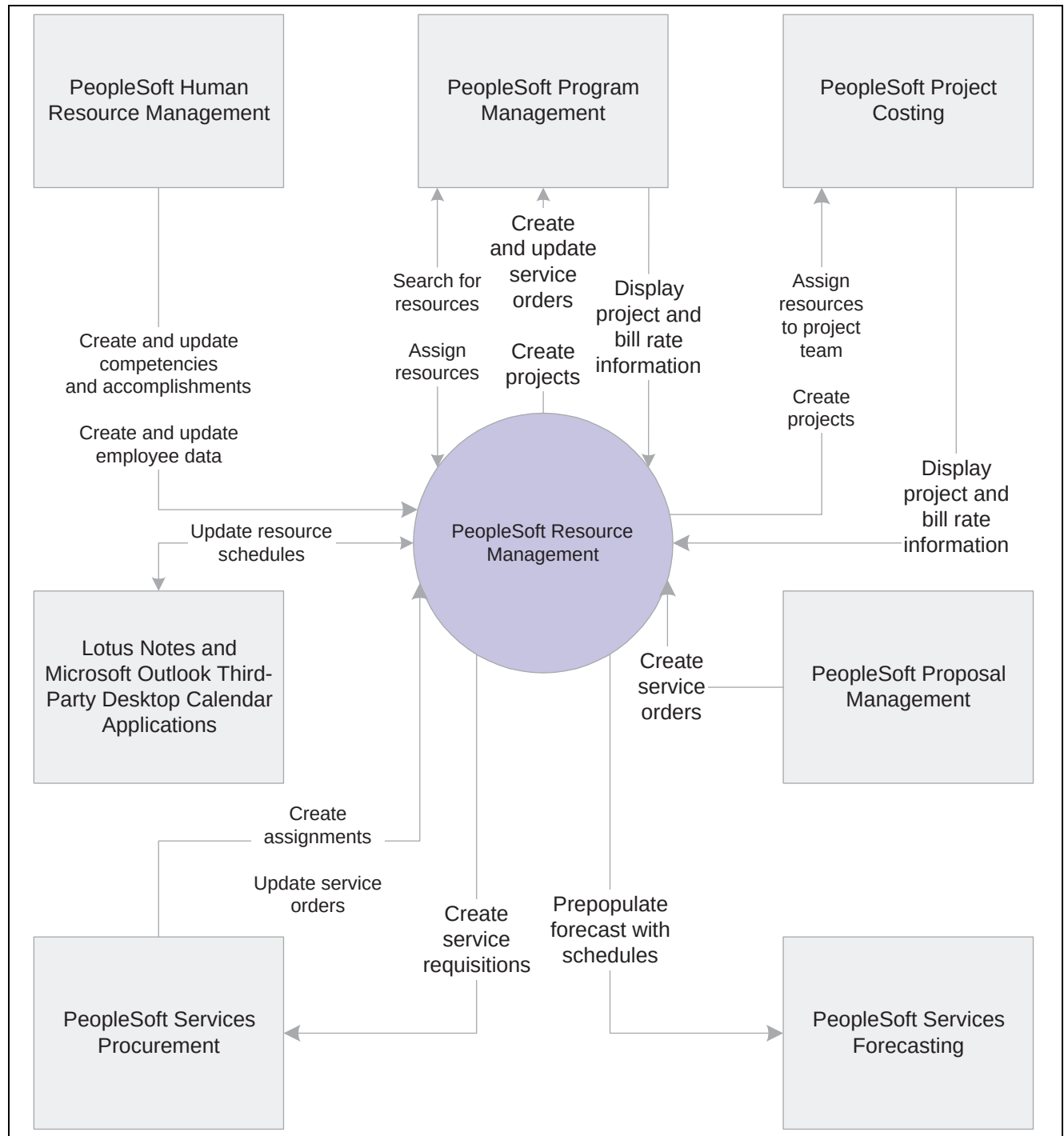
We discuss these business processes in the business process chapters in this PeopleBook.

See Also

Chapter 2, “Understanding PeopleSoft Resource Management Business Processes,” page 7

PeopleSoft Resource Management Integrations

PeopleSoft Resource Management integrates with these PeopleSoft and third-party applications:



PeopleSoft Resource Management integrations

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

See Also

[Chapter 8, “Setting Up PeopleSoft Resource Management with PeopleSoft HRMS,” page 75](#)

[Chapter 11, “Integrating PeopleSoft Resource Management with Other Applications,” page 109](#)

PeopleSoft Resource Management Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Resource Management also provides component interfaces to help you load data from an existing system into PeopleSoft Resource Management tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists the components that have setup component interfaces for loading data.

Component	Component Interface	References
RS_CM_COMPTNCY_TBL	RS_CM_COMPTNCY_TBL	See Chapter 9, “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” Establishing Application Setup Tables for Competencies, page 90.
RS_CM_PERSONAL	RS_CM_PERSONAL	See Chapter 9, “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” Creating Employee Data Files, page 92.
RS_CUST_INFO	RS_CUST_INFO	See Chapter 12, “Establishing Customers,” Working with Customer and Contact Profiles, page 122.
RS_WRKR_CREATE	RS_WRKR_CREATE	See Chapter 13, “Establishing Resources,” Establishing and Maintaining Employees and Non-Employees as Resources, page 126.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “PeopleSoft Application Fundamentals PeopleBook Preface”

PeopleSoft Setup Manager for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook

PeopleTools PeopleBook: PeopleSoft Component Interfaces

CHAPTER 2

Understanding PeopleSoft Resource Management Business Processes

This chapter discusses:

- PeopleSoft Resource Management business processes.
- Data components that support the staffing process.
- Resource matching.
- Resource optimization.

PeopleSoft Resource Management Business Processes

Project-based service enterprises must maintain a staff of skilled resources and match them to the customers' requests for services. The customer typically identifies the schedule, experience, and skills required to complete the project. To effectively manage this process, you must have the tools to capture customer requests. You must also evaluate and match customer requirements with the current inventory of resource competencies, preferences, and schedules to find the best-fitting assignments for resources. In addition, you need to sustain the highest levels of resource utilization possible.

To address the tasks of managing assignable resources and fulfilling customer requests, the service organization must perform the following business processes and tasks:

- Establishing and managing resource information, including:
 - Establishing resources.
 - Maintaining resource profiles.
 - Maintaining resource schedules.
- Assigning resources to projects, including:
 - Defining resource requirements.
 - Performing express searches for top candidates.
 - Creating assignments from search results.
 - Directly assigning specific resources.
- Managing service orders and assignments, including:
 - Recording service order resource requests.
 - Fulfilling resource requests based on resource availability, qualifications, and preferences.

- Managing enterprise-wide resource supply and demand.
- Outsourcing assignments to contractors.
- Identifying service orders and assignments that need attention.
- Controlling resource assignment status and schedule changes.
- Notifying users of resource assignment status and schedule changes.
- Requesting assignments for resources, including:
 - Searching the service order pool for desirable assignments for resources.
 - Submitting resource recommendations for assignments.
 - Submitting resource bids for assignments.
- Determining the scheduling, training, and hiring needs, including:
 - Analyzing current and future resource availability.
 - Analyzing and forecasting workforce utilization.
 - Analyzing current and future skill requirement trends.

PeopleSoft Resource Management addresses the various processes required to manage resource-scheduling activities. Those processes include maintaining a current interactive database of resources and requests for services, as well as generating reports and real-time analytical charts to review utilization and anticipate future needs.

Data Components That Support the Staffing Process

PeopleSoft Resource Management uses a collection of data about resource qualifications and preferences, resource availability, and requests for services from customers. This information is assembled in data files that support the variety of tasks required to manage resources and staff assignments.

This section discusses:

- Resource profiles.
- Resource schedules.
- Assignments.
- Service orders.

Resource Profiles

PeopleSoft Resource Management presents employee information as an editable resource profile that organizes the information from the employee source database and adds information relevant to PeopleSoft Resource Management. The resource profile serves as a resource's online resume. It includes skills, education, work history, preferences, specialties, objectives, and general information to match with the requirements specified on a service order resource request or express search for resources.

The resource profile contains the following information about each resource:

Resource Profile Section	Description
Overview	Briefly describes the resource's work objectives and background.
Specialties	Identifies the competencies or competency categories that are strengths or areas of expertise for the resource.
Work Experience	Summarizes the work that the resource has performed. This information is updated automatically by PeopleSoft Resource Management each time a resource receives a new assignment. Information can also be entered manually. You typically use manual entry when the product is implemented or when a new resource joins the organization and wants to add previous consulting experience to the profile.
Qualifications	Lists competencies and accomplishments that describe the resource, such as competencies, interests, education, licenses and certificates, languages, memberships, honors and awards, and test results. You select the qualifications to track during PeopleSoft Resource Management implementation.
Preferences	Tracks flexible resource preference attributes defined by the organization. The system uses this information to match resources with projects that they prefer.
General Information	Provides access to a resource's address and phone numbers, job information, passports and visas, weekly work days, home airport, assignment restrictions, resume attachments, and other resource attribute values.
Resource Profile (summary)	Appears as a single display-only page. During implementation, you select the sections to appear.

Resource Schedules

PeopleSoft Resource Management uses the resource schedule to interactively manage a resource's availability for assignments. The resource, resource manager, project manager, practice manager, and staffing coordinator can view and update the schedule. You can create schedule entries manually to reflect meetings, training, or personal time. The system updates the schedule during the assignment process to reflect the resource's scheduled work.

If you integrate PeopleSoft Resource Management with third-party desktop calendar applications such as Lotus Notes or Microsoft Outlook, the resource schedule can also reflect the entries generated by the third-party calendar source.

See [Chapter 14, "Enabling Resource Schedules," Synchronizing with Third-Party Desktop Calendars, page 148](#).

Assignments

Once you define resource requirements for a job and identify an appropriate resource, you create an assignment to assign the resource to the job. Assignments are the goal of the staffing process. Each assignment pairs a resource with a unit of work. It is created as the final step in a business process that usually begins with one of the following actions:

- The creation and fulfillment of a service order.

You create an assignment when you select a resource to fulfill a resource request. You can request one or more resources—each with identical qualification and date requirements—for the same resource request. Each resource that is selected for the job has a unique assignment. In this way, you can change the assignment schedule or status for one resource without affecting the assignments for other resources who are associated with the resource request.

- The creation and execution of an express search.

You can create an assignment by using the Express Search feature—also known as *orderless searching*—to find a resource that matches a specified list of competencies and accomplishments.

- A direct assignment without a service order or express search.

You can use this process if you have already identified the appropriate resource to fulfill a requirement and you don't need to track the requirement on a service order.

If you use PeopleSoft Program Management, you can select a resource and create an assignment using any of the preceding processes. The resource must be managed in PeopleSoft Resource Management. In Resource Management, you associate a project with each assignment. This enables new assignments to update the project resource list. Changes to the resource's project schedule in Program Management are reflected on the assignment, resource schedule, and resource profile in PeopleSoft Resource Management. Conversely, changes to the assignment in Resource Management are reflected in PeopleSoft Program Management.

If you use PeopleSoft Project Costing, a resource is added to the project team in Project Costing when you create an assignment for the resource in PeopleSoft Resource Management. Any changes made in the Resource Management project schedule are reflected on the project team in Project Costing. Changes made to the project team in Project Costing are not updated in Resource Management.

You can access assignment details by clicking a link in the Staffing Workbench component, My Assignments component, from PeopleSoft Resource Management reports, or on a service order (if the assignment is associated with a resource request on the order). Assigning a resource may require the approval of the resource's manager, depending on options that are selected for the business unit during PeopleSoft Resource Management implementation.

Service Orders

PeopleSoft Resource Management enables you to define services that are requested by a customer in the form of a service order.

If you use PeopleSoft Program Management, you can create a service order to fulfill generic resource placeholders on a project.

The service order form captures information about the customer engagement and includes one or more resource requests. The resource request section of a service order includes all data relevant to the identification of the requested resources. A new resource request is needed for each type of resource that is requested. Multiple resources can be requested on a single resource request, provided that the same requested skills, time frame, and location apply for each.

Once service orders are entered, they are maintained by a set of status values that reflect service order fulfillment progress.

The system uses the requirements detailed in the service order and resource request to match the available, qualified resources during the order fulfillment process in the Staffing Workbench component.

Resource Matching

PeopleSoft Resource Management is designed to replicate many of the manual processes inherent in professional service and internal service organizations. Its features process as much information as possible in the background. This design enables you to manage resources more effectively and to be more responsive to customers and resources by providing timely, accurate data. This approach keeps you from having to constantly research and reassemble information from resource schedules, resource profiles, and project requirements. You can confidently pair resources and assignments by relying on specified objectives and sound information.

The Resource Match engine evaluates the skills, experience, availability, education, and other information about resources and weighs these against the requirements that are specified in a request for services. You can use resource matching to:

- Find work for resources by using the Staffing Workbench - Manage Utilization page.
- Find work for yourself by using the Job Spy page.
- Search for resources to fulfill demand by using the Staffing Workbench - Fulfill Orders page.

The Resource Optimization feature also uses Resource Match engine calculations when it evaluates candidates for a resource request.

The Express Search feature is an alternative, ad hoc method of finding resources in PeopleSoft Resource Management. You can specify requirements and perform an express search for resources—without a service order.

Resource Optimization

The Resource Optimization feature evaluates all open resource requests and compares them with available employee resources. It then uses that information to propose a staffing plan.

You can specify objectives and select one or more business units to include in a single optimization process. The result is a solution set that represents the optimal pairing of available employee resources to open resource requests based on weighted objectives that you define. You can create an optimal solution set for each business unit or unique group of business units.

On the Staffing Workbench - Fulfill Orders page, you can view and assign the resources who the Resource Optimization feature proposes for the requests that appear in the work space. Use the Reports folder to view each solution set in a report format.

CHAPTER 3

Understanding Resource Matching

This chapter discusses:

- The Resource Match engine.
- Features that use the Resource Match engine.
- Resource Match engine fit score calculations.
- Express searching using the Verity Search engine.

The Resource Match Engine

This section lists prerequisites and discusses:

- Resource Match engine purpose.
- Resource Match engine data components.
- Factors, factor groups, and objective fit.
- Flexible attributes.
- Relative importance of factors and factor families.
- Resource match engine automatic and batch processes.
- Resource groups.

Prerequisites

You must satisfy these prerequisites before you can use the Resource Match engine:

- Select Resource Match engine options during implementation on the Installation Options - Resource Management page.

Each factor used by the match process belongs to a factor family. You assign the relative importance of each factor within its family.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Setting Installation Options for PeopleSoft Applications,” Setting Up PeopleSoft Resource Management Installation Options.

- Optionally define flexible attributes.

See Chapter 16, “Enabling Resource Matching and Cache Processes,” Defining Flexible Attributes, page 174.

- Define and schedule the cache processes.

It is through maintenance of the cache processes that you provide the appropriate data to fuel the Resource Match engine.

See [Chapter 16, “Enabling Resource Matching and Cache Processes,” Administering Cache and Maintenance Processes, page 179.](#)

- Activate the Publication and Subscription feature on the PeopleSoft Resource Management application servers.

Note. The application messages that are used by the Resource Match engine are delivered enabled in PeopleSoft Resource Management.

See *PeopleTools PeopleBook: PeopleSoft Server Tools Administration*

Resource Match Engine Purpose

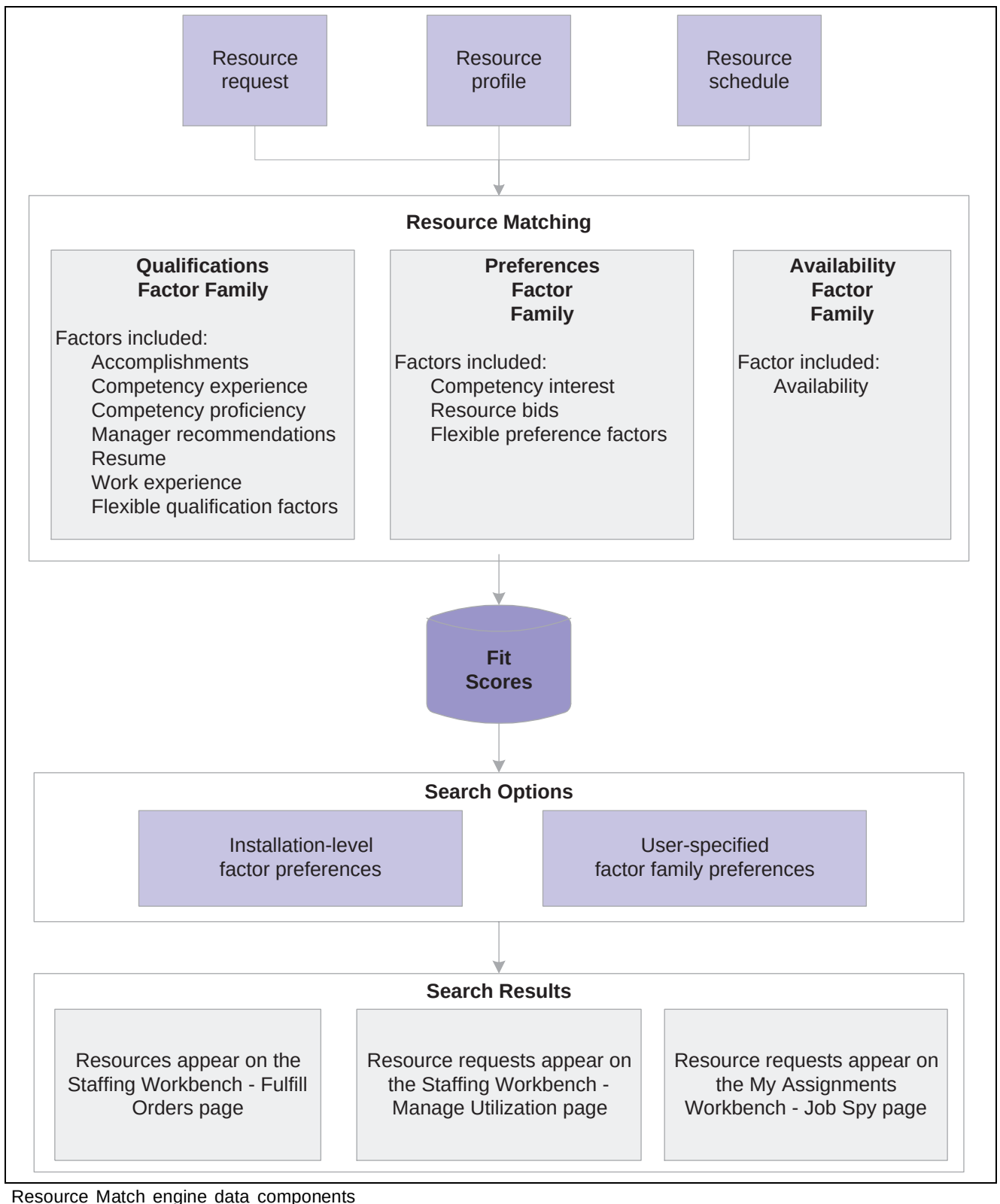
The Resource Match engine process matches eligible resources to resource demand. It objectively assesses all the resources in your organization and ranks a resource’s level of fitness for each defined factor measured against the requirements for a job. Alternatively, it evaluates all unfulfilled demand and determines, for a given resource, which jobs are appropriate. The Resource Match engine runs primarily as a background process. While the results are available from many points within the application, the process is virtually transparent to the end user. Several features take advantage of resource matching to:

- Identify resources who are the best fit for a job.
- Identify jobs that are the best fit for a resource.

The power of resource matching lies in the use of PeopleTools technologies, including component interfaces and application messages. These tools enable the Resource Match engine to maintain current resource fit scores by immediately capturing changes that affect fit scores and triggering a calculation. By calculating fit scores in the background, the application can speed the Resource Match engine, so that when you initiate a search, results appear faster.

Resource Match Engine Data Components

This diagram shows the data components—resource requests, resource profiles and schedules—that fuel the Resource Match engine calculations:



Factors, Factor Families, and Objective Fit

The Resource Match engine evaluates several different factors, such as availability, competencies, and interests, when deciding if a resource is a good fit for a job. It adjusts the fit assessment by considering which factors are important to your company.

Manually assessing how well a given resource fits a resource requirement is a complex task. It's difficult enough to obtain in-depth knowledge about the assignment's requirements and logistics and the resource's capabilities, interests, and schedule. The real challenge, though, lies in evaluating all the ways that a resource can be right or wrong for an assignment. Perhaps the resource has the necessary skills but is not interested in doing that kind of work. Maybe the resource was recommended for the assignment but is already booked for that period of time. Resource matching accomplishes this task by evaluating various factors, such as competency proficiency, resource interests, availability, and manager recommendations, and assessing how well the resource matches the requirement for each factor. This assessment is captured as a fit score, which indicates how well a specific resource matches a specific resource request for that factor.

In the context of the Resource Match engine, a factor is one way to evaluate the fit between a resource and a resource request. A factor can usually be presented as a question. For example, the Availability factor asks the question, "Is the resource available during the requested timeframe?" The Competency Proficiency factor asks the question, "Does the resource have the requested proficiency in the requested competencies?" The Resource Match engine generates a quantitative, objective answer to the questions posed by each of the factors.

When you install PeopleSoft Resource Management, you immediately have nine of the most common matching criteria available to match resources and resource requests. You can also define optional flexible factors. The Resource Match engine assesses each resource based on these standard factors and any optional flexible factors that you define. You can establish the importance, or weighting, of each factor to be applied within factor families. At search time, each user can further refine their search by adjusting the relative importance of each of factor family.

resources who have the requested values for a factor are considered a good fit for the resource request based on that factor.

This table describes the nine standard factors:

Factor	Description
Accomplishments	Compares resource accomplishments with the requested accomplishments on a resource request.
Competency Proficiency	Compares the requested competency proficiencies on the resource request with the competency proficiencies of the resource.
Competency Experience	Compares the requested competency years of experience on the resource request with the number of years of experience that the resource has in the requested competencies.
Resume	Compares resume data with keywords that are specified on a resource request. Resource resume documents are attached to the resource profile and the default resume attachments are indexed by Verity—a third-party search engine.

Factor	Description
Work Experience	Compares the work experience description with keywords that are specified on a resource request. Work experience entries are stored in the resource profile. The work description is indexed by Verity.
Manager Recommendations	Evaluates whether a manager recommended a resource for a resource request. Recommended resources are considered a good fit.
Competency Interests	Compares the requested competencies on a resource request with the competency interests of the resource. resources who have expressed interest in the requested competencies are considered a good fit.
Resource Bids	Evaluates whether the resource expressed interest in the resource request. resources who submit a bid for a resource request are considered a good fit.
Availability	Compares resource schedules against the requested start and end dates of a potential assignment on a resource request. resources who have more unscheduled time during the requested timeframe are considered a better fit. By acting as a repository for tasks, the resource schedule reflects the availability for each resource. Assignment statuses and task categories are used to calculate the Availability factor for each resource.

Factors are further grouped into factor families to provide three key scores to evaluate for each candidate—Qualifications, Preferences, and Availability. This table lists the standard factors and optional flexible factors that make up each factor family:

Factor Family	Included Factors
Qualifications	Resource Accomplishments, Competency Proficiency, Competency Experience, Resume, Work Experience, Manager Recommendations, and Flexible Qualification factors.
Preferences	Competency Interests, Resource Bids, and Flexible Preference factors.
Availability	Availability factor.

Flexible Attributes

Flexible attributes enable you to define and immediately implement, without customization, new resource or service order attributes that are unique to your business. You can also designate flexible attributes as factors that are included in the Resource Match engine factor fit score calculation. Flexible attributes are optional.

The two types of flexible attributes are:

- Resource attributes.

Resource attributes provide information about a resource, such as industry specialty, and are captured on the resource profile.

- Service order attributes.

Service order attributes provide information about a job, such as the dress code, and are captured on the service order.

Each flexible attribute can enable either a single value or multiple values to be associated with the resource or resource request. A single-value resource attribute enables a resource to specify only one attribute value. An example of a single value resource attribute is region. It's likely that each resource is assigned to only a single region; therefore, the region attribute would be defined as only allowing a single value for each resource.

A multiple-value resource attribute enables a resource to specify multiple attribute values. An example of a multiple-value resource attribute is industry specialty. Because a resource may have more than one industry specialty, the industry specialty attribute would allow multiple values for each resource.

Flexible attributes can be used for informational purposes only, or they can be used as factors in resource matching. You specify the intended use of the attribute when you establish it.

Relative Importance of Factors and Factor Families

The Resource Match engine identifies resources who are candidates for a given resource request, and resource request candidates for a given resource. This list of candidates should closely resemble the list that you would have created if you performed the process manually. To achieve this goal, the Resource Match engine takes into account the preferences of the organization and the individual user.

For example, when evaluating a resource's qualifications, the most important criteria might be whether the resource has the competency proficiency requested by the customer. You might not give as much weight to years of experience. Another company may place a higher emphasis on accomplishments. Yet another might believe that the most important criteria is a manager's resource recommendation for the assignment.

To allow for these different approaches, you can establish factor and factor family priorities as follows:

- During implementation on the Installation Options - Resource Management page, you can prioritize the fit scores for individual factors within factor families.

These priorities specify the factors that are used by the Resource Match engine and how much weight to give to each factor.

- Users can prioritize factor family fit scores each time they search for resources or resource requests in the Staffing Workbench component or the My Assignments component.

At search time users can further refine their search by adjusting relative weight of each factor family. For example, you might consider the most important criteria for one resource search to be whether the resource has the qualifications requested by the customer. In this case you don't give as much weight to availability if you are confident that the right resource can be made available. By adjusting the relative factor family importance levels, the Resource Match engine gives more weight to a factor family fit score with a higher importance level than a factor family fit score with a lower importance level.

The values used to specify relative importance range from *Not at all important* to *Much more important*. If you do not want a factor or factor family to be included in the Resource Match engine, specify *Not at all important*.

Resource Match Engine Automatic and Batch Processes

The Resource Match engine uses application messages to automatically trigger a complex set of calculations to update factor fit scores when you add a new resource, change a resource request, or change a resource's eligibility status, resource profile, or resource schedule. In addition, factor fit scores can be refreshed using an Application Engine process through the PeopleSoft Process Scheduler. The Refresh Match Cache Application Engine process (RS_DF) can refresh one or any combination of specified factors in batch for all eligible resource-and-open resource request combinations.

Automatic Calculations

The Resource Match engine uses application messages to ensure that each resource's fit to each open resource request begins calculating as soon as a change occurs. The use of application messaging in resource matching triggers the calculation of fit scores. When you search for an appropriate resource or resource request in the Staffing Workbench component (RS_MYSERVICEORDERS) or My Assignments component (RS_MYASSIGNMENTS), the Resource Match engine evaluates each resource's fit to the resource request.

Application messages that are used in PeopleSoft Resource Management for the Resource Match engine are different from the traditional messages that are used in the PeopleSoft HRMS integration. Resource matching messages are intranode messages, meaning that the same system functions as both publisher and subscriber. Resource Management uses application messages to publish to the Resource Match engine when certain events occur. Since the calculation of fit scores involves complex business logic, the message is sent asynchronously to the Resource Match engine so it does not delay online transaction processing. The subscription PeopleCode on these messages detects the changes in the message and calculates the appropriate fit scores.

These actions trigger the Resource Match engine to automatically calculate factor fit scores:

- Resource request change.

A change to a resource request on a service order triggers a message. Factor fit scores are calculated for all eligible resources for the particular resource request. Only factors that are affected by the change are calculated.

- Service order change.

A change to the service order status triggers a message. Factor fit scores are calculated for all eligible resources for the resource requests on this service order if the service order status changes from *Draft* or *Closed* to a status of *New*, *In Process*, or *Open*.

- Resource schedule change.

A change to a resource schedule, such as an assignment or appointment date change, triggers a message. Availability fit scores for all open resource requests are calculated for this resource. The Availability factor is the only factor that is affected by this change.

- Resource profile change.

A change to a resource profile, such as changes to competencies, accomplishments, or flexible factors, triggers a message. Factors that are affected by the change are calculated for all open resource requests for this resource.

- New or eligible resource.

Establishing a new resource, or changing an existing resource's eligibility status to *Eligible*, trigger a message. All factors for all open resource requests are calculated for this resource.

This table lists the application messages and message channels that are used by the Resource Match engine:

Message	Message Channel
PERSON_ACCOMP_SYNC_FIN	SRS_WORKER
PERSON_COMPETENCY_SYNC_FIN	SRS_WORKER
RESOURCE_PROFILE_UPDATE	SRS_WORKER
RS_DF_OPTIMIZED_SCHED_UPDATE	RS_DETERMINE_FIT
RS_SCHED_TASK	SRS_WORKER
SERVICE_ORDER_UPDATE	SERVICE_ORDERS
WORKER_CREATE	SRS_WORKER

The messages are delivered with a default status value of *Active*.

Batch Process Calculations

The Refresh Match Cache process is an Application Engine process that calculates and caches factor fit scores for factors that you specify. You calculate fit scores for an individual factor, or group the factors in logical batches. Schedule the process using the PeopleSoft Process Scheduler to run immediately or at a time when system usage is low. When the process runs, it calculates the specified factor fit scores for all eligible resource-and-open resource request combinations.

These situations require that you run the Refresh Match Cache process for the affected factor fit scores:

- During implementation (all factors).
- After the Create Resources Application Engine process (RS_CW) is executed (all factors).
- After standard hours or standard days change on the Installation Options - Resource Management page (Availability factor).
- After standard hours change on the Job record (JOB) (Availability factor).
- After new holidays are added to the holiday schedule and loaded with the Holiday Load Application Engine process (RS_HOLIDAY) (Availability Factor).
- After the evaluation type changes on the Installation Options - Resource Management page (Competency Proficiency, Competency Interest, and Competency Experience factors).
- After review points change for the Interest rating model (INT) used for Competency Interest and Flexible Preference factors (Competency Interest and Flexible Preference factors).
- After review points change for the rating model that is used for the Competency Proficiency factor (Competency Proficiency factor).

See Also

[Chapter 16, “Enabling Resource Matching and Cache Processes,” Refreshing the Match Cache Table, page 189](#)

Resource Groups

Resource groups are collections of resources who can be defined by one or more organizational units or one or more supervisor IDs. A resource group can contain organizational units from different business units.

Resource groups serve two main purposes:

- They can be used to selectively limit, broaden, or redirect the search for resources to different parts of the organization.
- They enable resource managers to specify the resources for which they will manage utilization on the Staffing Workbench component.

Users with access to the Express Search or Staffing Workbench components can establish their own set of resource groups. Users also designate which resource groups are active, which makes the groups easily accessible when searching for resources throughout the system.

Note. When evaluating resource factor fit scores, the Resource Match engine only retrieves resources who are members of the resource group specified for the search.

Features that use the Resource Match Engine

This section discusses:

- Matching service orders to resources using the Staffing Workbench - Fulfill Orders page.
- Finding assignments for resources using the Staffing Workbench - Manage Utilization page.
- Finding assignments for yourself using the My Assignments - Job Spy page.
- Selecting search options and settings.

Matching Service Orders to Resources Using the Staffing Workbench Component

The Staffing Workbench - Fulfill Orders page is designed for staffing coordinators or practice managers to manage the complete life cycle of service orders. During the business process of fulfilling service order resource requests, you can use the Resource Match engine to find a selectively tailored match to the staffing requirements.

Finding Assignments for Resources Using the Staffing Workbench Component

The Staffing Workbench - Manage Utilization page is designed for resource managers or practice managers to manage utilization of their resources to their fullest potential. You can use the Resource Match engine to find open resource requests that fit the skills and interests of eligible resources.

Finding Assignments Using the My Assignments Component

The My Assignments - Job Spy page enables a resource to search for new assignments and submit bids for open resource requests. You can use the Resource Match engine to find open resource requests that are a good fit for you.

Selecting Search Options and Settings

The features that use the Resource Match engine are designed with a similar interface for you to specify search options when you initiate a search for resources or new assignments. On the Fulfill Orders, Manage Utilization, and Job Spy pages you can specify the:

- Group of resources or requests to consider in the search.
- Relative importance, or weighting, of the Availability, Qualification, and Preference factor families for each search.
- Number of candidates to retrieve in the search.

Resource Match Engine Fit Score Calculations

Each match factor requires separate algorithms in the Resource Match engine. This section discusses the:

- Accomplishments factor.
- Competency Proficiency and Competency Experience factors.
- Accomplishment and Competency importance ratings.
- Work Experience and Resume factors.
- Manager Recommendation factor.
- Flexible Qualification factors.
- Competency Interest factor.
- Resource Bid factor.
- Flexible Preference factors.
- Availability factor.
- The match cache.
- The overall fit score.

Accomplishments Factor

The Accomplishments factor compares resources' accomplishments with accomplishments requested on the resource request. An accomplishment is an objective, measurable achievement. The four types of accomplishments that are included in the Accomplishments factor are:

- Education (degrees).
- Licenses and certificates.

- Memberships.
- Languages.

Note. The Resource Match engine does not include honors, awards, and test results in the Accomplishments factor fit score.

In the resource profile, resources can list their accomplishments and record detailed information about each accomplishment. You can request resources with specific accomplishments on a resource request. For each requested accomplishment, you can specify whether it is desired or required that the resource have that accomplishment.

The Accomplishments factor fit score ranges from 0 to 100. The score is:

- 100 for resources who have all of the requested accomplishments.
- 0 for resources who have none of the requested accomplishments.
- Between 0 and 100 for resources who have some, but not all, of the requested accomplishments.

When evaluating the fit of a resource to a resource request relative to accomplishments, the resource is assigned an intermediate score for each requested accomplishment. These intermediate scores range from 0 (no match) to 100 (perfect match). These low-level scores are combined to derive the Accomplishments factor fit score.

Typically, for an assignment, some accomplishments are more important than others. To address this need for prioritizing, indicate that an accomplishment is required. Marking an accomplishment as required indicates that you will only consider resources who have the requested accomplishment. Therefore, resources who lack a single required accomplishment *fail* the Accomplishments factor. Resources with a failing score are never returned as candidates for that assignment by the Resource Match engine.

The system handles accomplishment types in a slightly different manner when searching for a good match between resources and resource requests. This table describes the Resource Match engine rules for the four accomplishment types that are included in the Accomplishments factor fit score.

Accomplishment Type	Resource Matching Rules
Education	If you are seeking resources with specific educational accomplishments, specify on the resource request which degree and major the resource should have. The fit score for this accomplishment type is: • 100 for resources who graduated with the requested degrees and majors. • 0 for resources who do not have the requested degrees, or are working on the degrees but have not completed it.

Accomplishment Type	Resource Matching Rules
Licenses and Certificates	You can specify on the resource request which license or certificate the resource should have, and a country and state or province where the license or certificate was received. The fit score for this accomplishment type is: • <i>100</i> for resources who have the requested licenses or certificates from the requested country and state or province, and whose licenses or certifications are current as of the start date of the assignment. • <i>100</i> if no country and state or province are specified on the resource request, resources have the requested licenses or certificates, and the licenses or certificates are current as of the start date of the assignment. • <i>0</i> for resources who do not have the requested licenses or degrees, or whose certification is expired by the time the assignment begins. • <i>0</i> if country and state or province are specified on the resource request, and the resources' licenses and certificates do not have these additional attributes.

Accomplishment Type	Resource Matching Rules
Memberships	You can specify on the resource request which professional membership the resource should have. The fit score for this accomplishment type is: • <i>100</i> for resources who have the requested memberships. • <i>0</i> for resources who do not have the requested memberships.
Languages	You can specify on the resource request which languages the resource should know. For each requested language, you must specify the desired proficiency level in three proficiency categories—speaking, reading, and writing. Available proficiency values are Low (the default value), Moderate, and High. Resources who have at least the requested proficiency in each proficiency category for the specified language receive a score of <i>100</i> for the accomplishment. Note. When determining the fit score for languages, the Resource Match engine assigns the same score to resources who exceed the requested proficiency and resources who meet it. Resources with no proficiency in any of the desired proficiency categories receive a score of <i>0</i> for the accomplishment. resources who have some proficiency in the desired categories, but not to the requested level, receive a score between <i>0</i> and <i>100</i>, with a higher score indicating a better fit.

Competency Proficiency and Competency Experience Factors

The Competency Proficiency and Competency Experience factors compare resource competencies against the competencies that are requested on resource requests. The Competency Proficiency factor evaluates how well the resource's proficiency in a competency matches the requested proficiency. The Competency Experience factor evaluates how well the resource's years of experience match the requested years of experience.

A competency is a skill, ability, or set of knowledge that is possessed by a resource and maintained on the resource profile. Associated with each resource competency are a specific proficiency (degree of expertise) and the number of years of experience the resource has with that competency. When completing a resource request, you can list desired and required competencies, proficiency, and years of experience.

The Competency Proficiency and Experience Factors use a similar algorithm to calculate fit scores. A resource-and-resource request combination scores:

- *100* for both factors for resources who have at least the proficiency and number of years of experience in the competency that is specified on the resource request.
- Less than *100* but greater than *0* on one of the factors for resources who have some proficiency or years of experience in the requested competency, but not as high as requested.

- 0 for resources who have no proficiency or years of experience in the requested competency.

Marking a competency as required indicates that you will only consider resources who have the required competency and at least the required proficiency and years of experience.

The Competency Proficiency factor is calculated only for competencies with a requested proficiency level. Competencies that are specified on the resource request that do not have a specified proficiency level are not included in the Resource Match engine fit score calculations for this factor.

The logic applies also to the Competency Experience factor; it is calculated only for competencies with a requested number of years of experience greater than zero.

Competency Proficiency Ratings

The model, or scale, that is used to rate proficiencies may be different for each competency. For example, one competency may have valid proficiencies of high and low, while another may have beginner, intermediate, and advanced. Regardless of the model that is used, each model is mapped by your organization to numeric review points. The highest rating given to proficiency within a model marks the upper boundary of that model (the highest possible proficiency) and the lowest rating (which is typically 0) always marks the lower boundary (no proficiency). For example, high and low can have review points of 25 and 50, respectively, with high representing the most proficient and low representing half the possible proficiency.

Individual Competency Fit Scores

When evaluating the fit of a resource to a resource request relative to competencies, the resource is assigned an intermediate score for each requested competency. These intermediate scores range from 0 (no match) to 100 (perfect match). Once the individual scores are produced, the low-level competency scores are added together—weighting each requested competency equally—to derive the final Competency Proficiency and Competency Experience factor fit scores for the resource-and-resource request combination.

Accomplishment and Competency Importance Ratings

Often for an assignment, some qualifications are more important than others. This is a different consideration than the desired level of competency proficiency. For example, a project may have two software programs to develop—one in PeopleSoft Application Engine and one in PeopleCode. The total amount of work is appropriate for a single resource. The PeopleSoft Application Engine program is difficult and requires a high degree of expertise, while the PeopleCode program is fairly straightforward. The PeopleSoft Application Engine program performs a peripheral function, and the PeopleCode program is essential to the day-to-day operation of the system. When searching for a resource to staff to this project, you can specify a high PeopleSoft Application Engine proficiency as desired, and at least an average PeopleCode proficiency as required.

You can specify an importance rating to each requested competency and accomplishment. The rating choices are *Desired* and *Required*. Marking a qualification as required indicates that you will only consider resources with at least the requested qualification. If the qualification type is a competency, marking it required indicates that resources must have at least the specified proficiency and requested number of years of experience for the competency.

resources who don't have a required accomplishment fail the Accomplishment factor.

resources who don't have a required competency proficiency or years of experience fail the Competency Proficiency or Competency Experience factor.

Resources with a failing score are not recommended for that assignment by the Resource Match engine.

Note. If during implementation you select *0 - Not at all important* as the relative importance of the Accomplishment factor in the Resource Match engine calculation of the Qualification factor family fit score, a resource can fail the Accomplishment factor and still be recommended for a resource request. This logic applies also to the Competency Proficiency or Competency Experience factors if during implementation you select *0 - Not at all important* as the relative importance of these factors in the calculation of the Qualification factor family fit score.

Work Experience and Resume Factors

The Resource Match engine uses Verity to determine a resource's fit for a resource request for the Work Experience and Resume factors. Verity is a third-party search engine tool licensed by PeopleTools so that PeopleSoft applications can run free-text data searches. Keywords define the criteria used to calculate these fit scores by searching the work experience description and default resume document attachment on the resource profile.

The scores are based on how many times the keywords appear in the resource's resume or work experience description relative to the size of their resume or work experience. For example, a resource request user can specify *PeopleTools* as the keyword. If the first resource has a one-page resume with *PeopleTools* listed five times, and the second resource has *PeopleTools* listed five times in a two-page resume, the first resource receives a higher score because there is a higher occurrence (high density) of the word *PeopleTools* relative to the size of the resume.

Manager Recommendation Factor

Recommendations enable resource managers to have direct input into the staffing process. You can recommend one or more resources for resource requests by entering a recommendation directly on the request or by selecting the *Recommend* action on the Staffing Workbench - Manage Utilization page. A resource can only be recommended for a given assignment once, meaning that multiple managers cannot recommend the same resource to the same resource request.

Recommendations influence the staffing process in two ways:

- Any user with access to the Staffing Workbench component or My Assignments component can view the resources who are recommended for a resource request.
- The Resource Match engine can use the Manager Recommendation factor fit score to calculate the Qualification factor family fit score, potentially increasing the Qualification fit score for the recommended resource.

Recommending a resource for an assignment indicates that the manager who made the recommendation believes the resource is a good fit for the resource request. The Manager Recommendation factor fit score is always either *0* or *100*.

The Resource Match engine does not calculate the Manager Recommendation factor until at least one resource receives a recommendation for a resource request. The factor becomes applicable after a resource receives a recommendation. When a resource receives a recommendation for a resource request, the score is:

- *100* for resources who are recommended for that resource request.
- *0* for all other resources who did not receive a recommendation for that resource request.

Flexible Qualification Factors

You can create additional factors—called flexible factors—without customization. The two types of flexible factors are Flexible Qualification factors and Flexible Preference factors. Flexible Preference factors are discussed later in this chapter.

When the Resource Match engine uses flexible resource attributes to match resources to resource requests, the attributes are called Flexible Qualification factors. Flexible Qualification factor values can be specified on the Qualifications tab of the Resource Requests page so you can further define the resource requirements for an assignment. They also appear on the Resource Profile - General Information page so resources can further define their qualifications.

Flexible Qualification factors measure how well a resource matches the requirements for a specific attribute that you define during implementation in the Flexible Attributes Setup component (RS_ATTRIB_SETUP). An example of a Flexible Qualification factor is industry. While two resources may possess skills and experience in financial software applications, implementing financial software for a retail conglomerate differs significantly from implementing financial software for a large university. You can create an Industry qualification factor to track resource industry specialties, specify an industry on the resource request, and find the best candidate using the Resource Match engine.

Depending on the configuration of the attribute, the resource profile can have one or more values for each Flexible Qualification factor. You can request one or more attribute values on the resource request. You can also specify the importance of the requested values.

Single-value and multiple-value flexible qualification attributes are handled in a slightly different manner on the resource request. In both cases, the resource request user can request multiple values for each attribute, but the meaning of the lists of values is subtly different. For single-value attributes, the list of values on the resource request represents the pool of desirable attribute values; a resource with any of the specified values is acceptable. For multiple-value attributes, the list of values on the resource request represents a portrait of the ideal resource; the perfect resource has all of the requested values.

Flexible Qualification factor fit scores range from 0 to 100. The Flexible Qualification factor fit score is:

- 100 for resources who have the values for that attribute that are specified on the resource request.
- 0 for resources who do not have the requested values for that attribute.
- Between 0 and 100 for resources who have some, but not all, of the requested values for the attribute.

Flexible Qualification Factor Importance Ratings

You can designate on the resource request which Flexible Qualification attribute values are desired and which are required.

For multiple-value attributes, you can designate each requested value as *Desired* or *Required*. The relative importance for multiple-value attributes provides a means for the resource request user to emphasize qualities that are important and de-emphasize qualities that are preferred, but not critical.

For example, you may want a resource with both government and telecommunications industry expertise, but government is more important to the success of the project. You therefore list both government and telecommunications on the resource request as values for the multiple-value attribute industry specialty, indicating that government industry experience is required and telecommunications is desired. Marking a value as required indicates that you will only consider resources with the required value. In this example using industry specialty, marking government industry experience as required means that resources without government industry experience are not evaluated by the Resource Match engine, while resources with both government and telecommunications are given priority.

For single-value attributes, you can designate each attribute value as *Desirable* or *Very desirable* to distinguish on the resource request which values you prefer more than others. For example, you may want a resource from either the western or southeastern regions, but your first choice is western. You can list both western and southeastern on the resource request as values for the Region single-value attribute, and specify the western region as very desirable and the southeastern region as desirable.

Single-value attributes function differently than multiple-value attributes with regard to required values. You cannot mark multiple requested values as required on the resource request because each resource only one value for the attribute. For single-value attributes, you can, however, specify that only resources with one of the requested attribute values be returned by the Resource Match engine in the search results. In the previous example using region, marking the Region single-value attribute as required means that only resources from the western and southeastern regions can be returned in the search results, while resources from the western region are still preferred.

resources who don't have a required attribute value fail the associated Flexible Qualification factor. resources who fail a Flexible Qualification factor are not recommended for the resource request, unless the relative importance of the Flexible Qualification factor is specified as *0 - Not at all important* during implementation.

Note. If during implementation you select *0 - Not at all important* as the relative importance of a Flexible Qualification factor in the Resource Matching calculation of the Qualification factor family fit score, then a resource can fail the Flexible Qualification factor and still be recommended for a resource request.

Single-Value Versus Multiple-Value Factors

For single-value factors, the ideal resource has the requested attribute value with the highest importance. The Flexible Qualification factor fit score is:

- *100* for resources who have the requested attribute value with the highest importance.
In the previous example using region, resources from the western region receive a fit score of *100*. In cases where two requested values share the same, highest importance, resources with either value receive a score of *100*.
- Between *0* and *100* for resources who have a requested attribute value that is not the highest importance.
Resources with one of the other requested values receive a score between *0* and *100* proportional to the importance assigned to that value.

For multiple-value factors, the ideal resource has all of the requested attribute values. The Flexible Qualification factor fit score is:

- *100* for resources who have all of the attribute values that are specified on a resource request.
In the previous example using industry experience, only resources with both government and telecommunications experience receive a score of *100*.

- Between 0 and 100 for resources with some, but not all, of the requested values.

Resources with some of the requested values receive a score between 0 and 100 proportional to the number of values they possess and the assigned importance of each value.

Competency Interest Factor

The Competency Interest factor compares resource competency interests against the specified competencies on a resource request. Resources can indicate their level of interest in performing work that requires the use of that competency. Each resource request can include a list of resource competencies that are important to the success of the assignment. The Resource Match engine uses resource interest levels for competencies to calculate Competency Interest fit scores for each resource-and-resource request combination.

Resource attitudes toward various characteristics of an assignment can range from *Very desirable* to *Very undesirable*. Resources may be motivated to work on some types of assignment, and not interested in working on other types. It may be important to consider resource preferences when deciding which resources are the best fit for resource requests. Giving resources the ability to express their preferences—and the knowledge that those preferences are not ignored—can improve the quality of the competency proficiency data associated with a resource. For example, resources with a lot of programming expertise can rate their proficiency as high. However, if they have a desire to branch out into other areas, they can rate their degree of interest in programming as low.

For each competency value, resources can select one of these five options to characterize their preference for the competency:

- 4–*Very desirable*
- 3–*Desirable*
- 2–*No Preference*
- 1–*Undesirable*
- 0–*Very undesirable*

Resources with interest in a competency that is specified on a resource request are assumed to be interested in that assignment. Competency Interest factor fit score ranges from 0 to 100. The score is:

- 100 for resources who consider the competencies *Very desirable* that are specified on the resource request.
- 0 for resources who specify an interest level of *Very undesirable* for the competencies that are listed on the resource request.
- 0 for resources if the competencies that are specified on the resource request do not exist on the resource profile.

Resources who assign higher interest levels on their resource profile for a competency will have higher Competency Interest factor fit scores than resources who assign lower interest levels or do not have the competency on their profiles. It is up to your organization to enforce standards regarding the definition of each preference rating.

Understanding the Relationship Between Competency Importance and Competency Interest Fit Scores

When specifying competencies on a resource request, you indicate the importance of each competency—*Desired* or *Required*—to the success of the project. This importance rating does not impact the Competency Interest factor score.

There are several reasons to assign a high importance to a requested competency. For example, if a large portion of the work to be done on the assignment involves the use of that competency, it is important that the resources have expertise in that area. Another example is if the competency is necessary to ensure the success of a high-priority task. The critical nature of the task means that it is extremely important that the resource has the requested competency, even if it won't be used often. Because it is impossible to know why a given competency has been marked as important, no assumptions are made regarding whether a resource would be more or less interested in an assignment based on the importance ratings assigned to competencies on the resource request.

The competency's importance level does not affect the calculation of the Competency Interest factor fit score.

The Resource Match engine evaluates resources for resource requests even if the resources do not express an interest in a *Required* competency.

Resource Bid Factor

Bids enable resources to have direct input into the staffing process. Resources can express an interest in a particular resource request by submitting a bid for the resource request. You can bid on one or more resource requests using the Job Spy page.

Bids influence the staffing process in two ways:

- A staffing coordinator, resource manager, or practice manager can view a list of resources who submitted bids for a particular resource request, and consider the bid when making a staffing decision.
- Bids influence the Preference family factor fit score that is returned by the Resource Match engine.

A resource who submitted a bid for a particular resource request may have a higher overall fit score than a resource who is equally as qualified and available, but did not submit a bid.

The Resource Bid factor fit score is always either *0* or *100*. The factor is not included in the Resource Match engine calculations until at least one resource bids on a resource request. When a resource bids on a resource request, the score is:

- *100* for resources who submitted a bid for the resource request.
- *0* for all other resources who did not submit a bid for that resource request.

Flexible Preference Factors

When flexible service order attributes are used to help match resources to requests, they are called Flexible Preference factors. Values for Flexible Preference factors can be specified on the Service Order - Additional General Information page of the resource request. They also appear on the Resource Profile - Preferences page so resources can further define their assignment preferences.

Flexible Preference factors measure the fit of resources to resource requests based on user-defined preferences for attributes that can be selected on a resource request. Flexible Preference factors measure how well the assignment matches the preferences of the resource regarding a specific, user-defined attribute. An example of a flexible resource preference factor is attire. Creating an Attire preference factor gives you the ability to track the dress code of each assignment, capture the attire preferences of each resource, and consider how compatible the two are when performing Resource Matching. You define Flexible Preference factors during implementation in the Flexible Attributes Setup component.

The resource request can have one or more values for each flexible attribute associated with the factor. Resources indicate their preference for each attribute value. Flexible Preference factors are calculated in the same way as Competency Interest factors.

Flexible Preference factor fit scores range from 0 to 100. The score is:

- 100 for resources who consider the attribute value *Very desirable* that is specified on the resource request.
- 0 for resources who have an interest level of *Very undesirable* for the attribute value that is specified on the resource request.
- 0 for resources if the attribute values that are specified on the resource request do not exist on the resource profile.
- 0 for resources if the attribute values that are specified on the resource request exist on their resource profiles, but the resources did not specify an interest for this competency.

If resources don't specify an interest for an attribute value on their resource profile, the Resource Match engine uses a default value of 0 to calculate the fit for the attribute on this resource request.

Availability Factor

The Availability factor is a ratio of a resource's unscheduled time during the resource request time frame to the amount of work on the request. At a high level, the factor compares the requested start date, end date, total days of work, and number of hours per day on a resource request to the resource schedules. Resource schedules track the amount of time that resources are working on assignment and appointment tasks. Each task has a start date, end date, and number of hours per day to indicate the amount of time during the task period that the resource is working on that task.

At a more detailed level, the Availability factor fit scores are the result of complex algorithms that are impacted, positively or negatively, by:

- Start and end dates on the resource request.
- Days of work on the resource request.
- Resource standard weekly work days on the resource profile.
- Standard work days on the Installation Options - Resource Management page.
- Standard hours per day on the Installation Options - Resource Management page.
- Resource standard day percentage calculation (identifying part-time and full-time workers).
- Task flexibility.
- Partial days acceptable option on the resource request.

The Availability factor objective fit score ranges from 0 to 100. The score is:

- 100 for resources who are available for the requested time period.
- 0 for resources who have no availability for the requested time period.

Note. Resources can be assigned to multiple tasks on the same day, even if it results in the resource being overbooked.

Resource Request Period, Period Days, and Days of Work

The resource request period is the date range between the first start date and last end date on the request. Period days are the number of days in the resource request period. The days of work are the specified number of work days that are required to complete the assignment during the resource request period.

The days of work can equal the period days, or there can be fewer days of work than period days. The more unscheduled time the resource has during the resource request period, the higher the Availability factor fit score.

If you specify a start and end date on a resource request and do not enter a value for days of work, the resource request calculates days of work as the number of work days between the start and end dates (the period days). In this case, there is no free time between the days of work and the start and end dates (the resource request period). This results in a lower Availability factor fit score for resources who are committed to other tasks during that period, even if their other tasks are small.

If you specify a start date and days of work, but no end date, the resource request calculates the end date as the start date plus the days of work. This also results in no free time between the days of work and the resource request period.

If you specify multiple, noncontiguous date ranges, you can only specify the start and end date of each date range. The days of work is equal to the period days for each date range.

Note. The Resource Match engine does not include non-work days in the Availability factor fit score calculation, regardless of whether the resource is available or unavailable on that day.

The standard weekly work days are defined during implementation on the Installation Options - Resource Management page.

Part-Time and Full-Time Resources

Full-time resources can be scheduled up to 100 percent of the standard work week before they are considered overbooked. Part-time resources work less than the standard number of hours per week. For example, a resource that works half days is unavailable on any day that is already at least 50 percent scheduled. To support this functionality, the Resource Match engine needs to know the standard day for each resource. The resource standard day defines how much time the resource has available for tasks on any given workday. The number of hours in a resource standard day is included in the Availability factor fit score calculations for the resource.

The resource weekly work hours represents the number of hours per week that the resource is expected to work. This value is taken from the resource's Job record. Not all resource work hours are stored at the week level, so the stored value is adjusted using the following formula:

resource weekly work hours = (*annualization factor* * *resource standard hours*) / 52, where annualization factor is the number of units per year (such as 52 if already stored at the weekly level, 12 if stored at the monthly level, and so on).

The number of days per week that a resource is expected to work is specified on the Resource Profile - General Info page. The number of hours per day that a resource is expected to work is calculated as the resource weekly work hours divided by the number of days per week that a resource is expected to work.

The resource standard day percentage is the resource hours per day divided by the standard hours per day. The formula is:

(*resource weekly work hours* / *resource standard work days per week*) / *standard hours per day*, which is specified on the Installation Options - Resource Management page.

Resources with a standard day of 100 percent who work a full standard workweek are considered full-time resources. Resources with a standard day less than 100 percent are considered part-time resources. Note that a resource with a standard day of 100 percent who doesn't work on all standard work days is not a full-time resource. For example, a resource who works Monday through Thursday when the standard workweek is Monday through Friday is not a full-time resource.

Resources can also have a standard day greater than 100 percent, indicating that they work more than the standard work hours on any given workday. This is the case, for example, for resources who work 10-hour days Monday through Thursday when the standard workweek is 8-hour days Monday through Friday. In this example, the resource has a standard day of 125 percent.

Task Flexibility

Resource schedules contain assignment tasks that can be internal or external, and billable or nonbillable. Schedules also contain appointment (nonassignment) tasks such as meetings, vacations, company events, and training. You may want to consider resources for assignments if the resources are already committed to nonessential appointment tasks, but not if the resources are already committed to scheduled assignments. For example, you may consider a resource with two weeks of scheduled training to be more available than a resource with a two-week billable assignment.

Each resource schedule task belongs to a task category that is assigned a flexibility percentage, which is used by the Resource Match engine to identify how easily a task in that category can be rescheduled. Tasks that are in a category with a high flexibility percentage are considered more likely to be rescheduled. Resources with high flexibility tasks on their schedules will have a higher Availability factor fit scores than resources with low flexibility tasks for resource requests during that period.

PeopleSoft Resource Management delivers twelve standard task categories and the ability for you to add your own task categories. You specify the category's flexibility during implementation on the Task Categories page. Flexibility is a percentage between 0 and 1, where *1.00* indicates that a task of this category is completely (100 percent) flexible and can be rescheduled. A value of *0.00* indicates the task is completely inflexible and tasks in this category should not be rescheduled. For example, a value of 0.90 (90 percent) for task category *Vacation* indicates that scheduled vacations only slightly reduce resource Availability factor fit scores.

You can also specify a reserved status flexibility for assignment task categories, which assigns a different, usually higher, flexibility for assignment tasks of that category that are in a status of *Reserved*.

Full-Day Assignments

A full-day assignment requires that a resource is available to work on the assignment for at least the standard hours per day each day of the assignment. Resources with fewer demands on their time during the resource request period receive a higher Availability factor fit. Resources with a standard day less than 100 percent always receive a score of 0 for full-day assignments. A full-day assignment is specified on the resource request by clearing (not selecting) the Partial Days Acceptable option on the request.

For full-day assignments, the Resource Match engine compares the number of days that a resource is available to the number of days of work on the request. The Availability factor fit score is:

- 100 for resources with no tasks scheduled during the requested period for a full-day assignment.
- 100 for resources with scheduled tasks in a category that has a flexibility of 100 percent.
- 0 for resources with no available days during the requested period for a full-day assignment.
- Between 0 and 100 for resources with some, but not all, days available during the requested period.

- Between *0* and *100* for resources with scheduled tasks in a category that has a flexibility greater than 0 percent during the requested period.
- *0* for resources with partially-scheduled days during the requested period for a full-day assignment.

Partial-Day Assignments

If you enable the Partial Days Acceptable option on the resource request, it has an effect on availability for two reasons:

- If enabled, it allows part-time workers to be matched for the resource request.
- It indicates greater flexibility in the assignment, which means that the resource can be scheduled partial days on the assignment.

A partial-day assignment does not require that a resource work on the assignment for the entire workday. This option is used if you care less when the resource actually performs the work as long as it is completed during the requested period. A partial-day assignment is specified on the resource request by selecting the Partial Days Acceptable option on the request.

For partial-day assignments, the Resource Match engine compares the number of hours that a resource is available to the number of hours of work on the request. The Availability factor fit score is:

- *100* for resources with more total free hours during the resource request period than the number of hours requested for the partial-day assignment.
- *0* for resources with no free time during the resource request period.
- Between *0* and *100* for resources with fewer available hours during the resource request period than the number of hours requested for the partial-day assignment.
- Between *0* and *100* for resources with scheduled tasks that have a flexibility greater than 0 percent during the requested period.

The Match Cache

The Match Cache table (RS_FACTOR_FIT) is where precalculated fit scores are held for ready access each time you search for resources or resource requests using the Resource Match engine. These factor fit scores are based on matching a resource to a resource request. The Match Cache table holds a score for every combination of eligible resources to open resource requests. The exception is that the table does not store scores of *0*.

The factor fit scores are cached for system performance. Using the cache table reduces overall processing time when you perform a search. The logic to calculate the different factor scores is complex, and the cache of scores in the database is continuously updated by changes in the system.

The Overall Fit Score

The matching process identifies and prioritizes candidate resources and service order resource requests using much the same logic that you would employ if you were performing the process manually. This coupling of objective and subjective analysis produces the overall fit score.

In the Staffing Workbench component and My Assignments component, you see a list of best matches. For example, in the Staffing Workbench - Manage Utilization page, you can view a list of the best open resource requests for eligible resources. On the Staffing Workbench - Fulfill Orders page, you can view a list of the best eligible resources for open resource requests. To generate these matches, the Resource Match engine calculates the overall fit score, ranks relevant combinations of resources and resource requests, and returns the top-ranking pairs.

A resource's overall fit score includes:

- The resource's Qualifications, Availability, and Preferences factor family fit scores for a resource request.
- The organization's individual factor priorities that are specified on the Installation Options - Resource Management page.
- The priorities that are specified by the user during the search session.

The overall fit score calculation begins with the objective fit scores for each match factor, then calculates factor family fit scores by applying installation-level relative factor importance settings, and finally averages the family scores according to the relative factor family preferences that are selected during search time.

The resulting overall fit score is not visible to the end user, but it controls which resources or resource requests are presented to the user. The resources or resource requests are returned in descending order of overall fit score. The overall fit score is not cached; it is calculated every time a user performs a search using the Resource Match engine in the Staffing Workbench component or My Assignments component.

Not all factors are necessarily included in the factor family fit score calculation. If you indicated during implementation that an individual match factor is not important, the factor fit score is excluded from the fit score calculations for the factor family that contains that factor. A factor fit score is also excluded if it does not apply to the resource request. For example, if accomplishments are not specified on the resource request, the Accomplishments factor is excluded from the Qualifications factor family fit score calculations.

Not all factor families are necessarily included in the overall fit score calculations. If you specify a search settings that a particular factor family is not important, the factor family fit score is excluded from the overall fit score calculations. In addition, if none of the factors in a factor family apply to the resource request, the factor family fit score is excluded from the overall fit score calculations.

Express Searching Using the Verity Search Engine

This section discusses:

- Verity Search engine.
- Express Searching for resources without a service order.
- Express Search data components.

Verity Search Engine

Verity is a third-party search engine tool licensed by PeopleTools so PeopleSoft applications can execute free-text data searches. In order to use Verity, you must use an Application Engine program to establish and maintain a Verity search index. The indexing process extracts information from the database and loads it into Verity formatted files on the Process Scheduler server. The Verity indexing application transforms those files into an index that is used for searching.

The Verity index contains this information about each eligible resource:

- Competency proficiency
- Competency experience
- Professional memberships
- Language speaking proficiency
- Language writing proficiency
- Language reading proficiency
- Licenses
- Degrees
- Flexible attribute values
- Work history description
- Resume

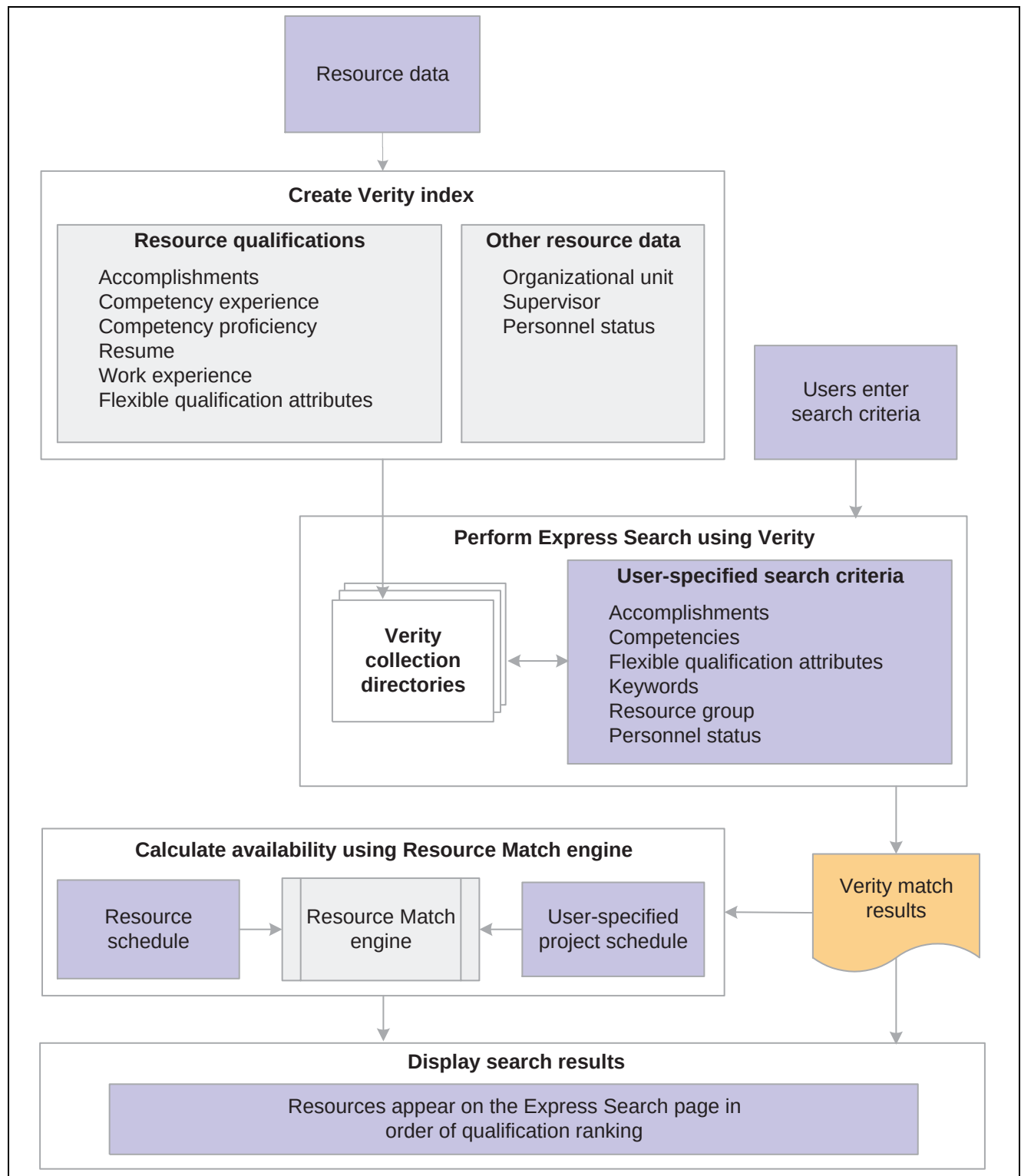
In addition, the Verity index contains the resources' organizational unit value, supervisor, and personnel status.

Express Searching for Resources Without a Service Order

With the Express Search feature, you can specify resource requirements and search for resources to fulfill those requirements in a single session—without a service order. You can define requirements through the use of a qualification profile, or select from a list of qualifications or the Competency tree. You may also specify keywords as part of your criteria. After you define the qualifications, specify the project start and end dates, and select the group of resources to consider in the search. The Express Search feature uses Verity to find resources who meet your qualifications, and ranks the search results according to qualification scores and availability.

Express Search Data Components

This diagram shows the data components that fuel the Express Search calculations:



Express Search data components

See Also

[Chapter 16, “Enabling Resource Matching and Cache Processes,” Understanding the Verity Search Index, page 181](#)

CHAPTER 4

Preparing to Implement PeopleSoft Resource Management

To implement a PeopleSoft application, first design the system's business structure based on your organization's business structure, practices, rules, and procedures. Then implement the PeopleSoft application features required to put that structure in place.

This chapter discusses:

- Employee source data options.
- PeopleSoft business structure.
- Organizational units.
- The Resource Optimization feature.
- Storage of resource resume attachments.

Understanding Employee Source Data Options

PeopleSoft Resource Management requires access to current personal and professional employee information. If you use PeopleSoft 8 Human Resources Management (PeopleSoft HRMS) or higher, this information is accessible from the HRMS database. If you do not use PeopleSoft HRMS, you can enter employee data into PeopleSoft Resource Management. If you use a third-party HRMS system or PeopleSoft 8 HRMS or earlier, PeopleSoft's PeopleTools provides the functionality to create an interface between PeopleSoft Resource Management and other HRMS databases.

During implementation planning you must determine the source of your employee data. Three possible sources of employee data are:

- PeopleSoft HRMS application database.
- An earlier version of PeopleSoft HRMS or a third-party HRMS application.
- PeopleSoft FSCM (Financial Management Solutions, Enterprise Service Organization, and Supply Chain Management) application database.

PeopleSoft HRMS

PeopleSoft Resource Management is tightly integrated with PeopleSoft Human Resources business processes. PeopleSoft recommends that you use PeopleSoft Human Resources business processes because of their complete functional capabilities and ease of integration with PeopleSoft Resource Management.

When you use PeopleSoft HRMS as your employee source database, selected data that is used to populate PeopleSoft Resource Management employee records and resource profiles is imported from HRMS using PeopleSoft application messages.

See Also

Chapter 8, “Setting Up PeopleSoft Resource Management with PeopleSoft HRMS,” page 75

PeopleSoft 7.x HRMS or Third-Party HRMS

If your organization uses a PeopleSoft 7.x HRMS or earlier, or a third-party HRMS application, you can create a bridge between your HRMS application and PeopleSoft Resource Management. You use PeopleSoft Integration Broker to map your data to PeopleSoft Resource Management.

Although you can use other HRMS applications and PeopleSoft Resource Management together, a third-party HRMS application may not support the full functionality of PeopleSoft Resource Management.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker

Chapter 10, “Understanding EIPs,” page 99

PeopleSoft Resource Management Without HRMS Integration

If you do not use an HRMS database as the source for employee or non-employee data, you must update the source data tables in PeopleSoft Resource Management to maintain employee and competency information.

See Also

Chapter 9, “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” page 83

Employee and Non-Employee Source Data

In PeopleSoft Resource Management you have the option to manage non-employee resources as easily as you manage employee resources. Non-employees may be contractors or consultants that your organization hired to do work for the organization. They may also be contract service providers that by your organization hired to provide services to an end customer.

During implementation, you determine whether your organization’s business processes allow non-employees to be established as resources. The effect of each option on establishing resources is:

- If your organization allows non-employees to be established as resources, the resources’ personnel status is visible throughout the system so that you can distinguish between employees and non-employees.

You can control non-employee resources’ eligibility, maintain their competencies, accomplishments, and schedules, search for non-employee resources, and assign non-employee resources to projects and service orders. In addition, the Person Type field (PER_TYPE) appears on the Employee Data page so that you can further classify the non-employee. Examples of non-employee person types are temporary worker or independent contractor.

- If your organization allows only employees to be established as resources, the non-employee’s personnel status appears on the Employee Data page for information, but you cannot establish a non-employee as a resource.

resources who appear elsewhere in the system all have the personnel status *Employee*, and therefore the Personnel Status field does not appear.

During implementation, you also select the employee and non-employee source database. The effect of each option on establishing resources is:

- If PeopleSoft HRMS is the *only* source for employee and non-employee data, you can review—but not create or update—employee records in PeopleSoft Resource Management.
- If PeopleSoft HRMS is the source for employee data, and PeopleSoft Resource Management is the source for some or all non-employee data, you can create employee records with the personnel status *Non-Employee* in either database, and you can review any employee records in PeopleSoft Resource Management.
- If PeopleSoft Resource Management is the *only* source for employee and non-employee data, you can create and update employee records in the FSCM database.

Understanding the PeopleSoft Business Structure

As with all PeopleSoft applications, you re-create your business environment within the PeopleSoft business structure when implementing PeopleSoft Resource Management. Business units, setIDs, and tablesets are the foundation that enables the flexible grouping of your people assets while minimizing the administrative burden of maintaining organization attributes. This feature enables you to organize your businesses by dividing them into logical units other than companies and departments—a particularly useful feature for companies operating in the global market. This feature also enables you to control how you share your organizational data among those organizational units.

This section discusses:

- PeopleSoft business units, setIDs, tablesets, and record groups.
- Projects and General Ledger business units.

See Also

[Chapter 8, “Setting Up PeopleSoft Resource Management with PeopleSoft HRMS,” page 75](#)

[Chapter 9, “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” page 83](#)

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

PeopleTools PeopleBook: PeopleSoft Application Designer

PeopleSoft Business Units, SetIDs, Tablesets, and Record Groups

During implementation planning, familiarize yourself with these PeopleSoft concepts:

Name	Description
Business units	A business unit enables you to track specific business information for reporting and other data consolidation. A business unit may be, but is not required to be, a legal entity. You define and implement business units to suit the organizational needs of the company. The data from one business unit is segregated from the data of other business units in the organization, although it exists in the same physical database table. The entire organization may have only one business unit if every department uses the same processing rules. Multinational or otherwise diversified companies, such as those that contain multiple cost centers, divisions, or subsidiaries, may have multiple business units.

Name	Description
SetIDs and TableSets	The accounting structure and processing rules for each PeopleSoft application are defined in a series of control tables, or tablesets. A tableset is a group of rows across control tables, identified by the same setID, that allow sharing of control data among business units. Many business units may share the same set of data on the physical tables in the HRMS or Financials system. In order for a business unit to process transactions, it must have an associated tableset. In simple terms: • The business unit contains the actual data. • The tableset contains the rules by which the data is processed. A setID identifies each tableset. You must create at least one setID even if you are not taking advantage of tableset sharing. You can have as many setIDs as necessary, but tableset sharing becomes more complex with multiple setIDs. Define tablesets when you implement PeopleSoft HRMS or any PeopleSoft application.
Record groups	A record group is a set of logically and functionally related control tables and views. Record groups save time by enabling tableset sharing to be accomplished quickly without the burden of redundant data entry. Record groups also ensure that tableset sharing is applied consistently across all related tables and views in the system. The PeopleSoft TableSet Record Group control table associates a business unit or setID value with a setID value for each record group. One business unit or setID can be associated with different setIDs by record group. Group the record definitions for the tables that you want to share, as well as any dependent record definitions. If a new table is added to a PeopleSoft application, the appropriate record group may already be defined. However, if tables are added for a new business function, a new record group may also be required.

See Also

“Planning Records, Control Tables, and TableSets” in the *PeopleTools PeopleBook: PeopleSoft Application Designer*

Project and General Ledger Business Units

PeopleSoft Resource Management uses the same business unit structure as PeopleSoft Program Management and PeopleSoft Project Costing. As financial applications that define project resources—labor, assets, and material—and track and report the costs of those resources, Program Management and Project Costing provide the link from Resource Management to the general ledger.

PeopleSoft Resource Management requires that you establish at least one project business unit, even if you don't use PeopleSoft Program Management or PeopleSoft Project Costing. You may want to establish more than one project business unit depending on the reporting requirements per project.

Understanding Organizational Units

During implementation you must define your organizational units and insert them into a hierarchical structure known as a *tree* using the PeopleSoft Tree Manager. For example, an organization can consist of 12 different companies grouped into three lines of business or subsidiaries, each represented by a business unit, along with a separate corporate business unit. All of these units—12 companies in three business units and a corporate business unit—roll up into the organization at the top of the hierarchy. Between the tree manager and your business unit structure, PeopleSoft Resource Management provides a powerful and flexible mechanism for defining reporting parameters.

Many organizations are composed of departments that fit hierarchically into a *treelike* structure. However, with PeopleSoft Resource Management you are not required to base your organizational structure on departments. For example, your structure can be based on geographical locations or job codes.

This table contains the primary areas in the application that depend on the organizational unit. Based on this information, and knowledge of your organization's business practices, choose the most appropriate organizational unit such as department, job code, location, or another unit.

Application Feature	Description
Owning organizations	The owning organization owns a service order, which is most likely the organization that sold the business to the customer and is responsible for ensuring that the requested services are delivered. The combination of owning business unit and owning organization are specified on each service order. Resources are tracked by organizational units. The Resource Match engine uses owning organizations to match resources with service orders. Users can search for resources in specific owning organizations to fulfill orders.

Application Feature	Description
Resource groups	Resource groups are collections of resources grouped by organizational unit or supervisor ID. Resource groups can be defined and saved by a user, and serve two main purposes. They can be used to selectively limit, broaden, or redirect the search for resources to different parts of the organization. They also enable a resource manager to define the group of resources who appear on the Staffing Workbench - Manage Utilization page.
Reports	The Chart Resource Schedules, Scheduled Utilization, Unassigned Resources, Assignments Ending, Assignment Listing, and Average Staffing Time reports enable a user to indicate which organizational unit to analyze. For example, the Scheduled Utilization interactive report calculates resource utilization for the specified organizational unit with the capability to drill down to the utilization of each individual in the unit.

After you identify the organizational unit, identify the field and record associated with that unit. This field is the organizational unit field. For example, if the organizational unit is Department, the organizational unit field is the Department ID field (DEPTID). The organizational unit record is the table that contains the valid values of the organizational unit field. For example, if the organizational unit field is DEPTID, the organizational unit record is the Departments table (DEPT_TBL).

Note. Every resource that PeopleSoft Resource Management tracks must belong to an organizational unit that is included on the organizational tree.

See Also

PeopleTools PeopleBook: PeopleSoft Tree Manager

Understanding the Resource Optimization Feature

The Resource Optimization feature proposes the optimal staffing solution that eliminates inefficiencies and matches the right resource to the right project at the right time—based on your business objectives. The Resource Optimization feature evaluates all open resource requests against available employee resources for one or more business units and proposes an optimal staffing solution set. You can create an optimal staffing solution for each individual business unit, or group business units into logical sets to run the Resource Optimization feature.

The Resource Optimization feature performs a complex set of algorithms to generate the optimal staffing solution sets, and stores each current solution set in memory for access by the application. To take advantage of this feature, you must first verify that the Process Scheduler server has adequate system specifications to perform Resource Optimization processes. Your system must have the memory, storage, and processing speed that are appropriate for your business practices. The amount of memory required to calculate a solution set effectively is a function of the number of open resource requests and active resources in the business units that belong to the set, as well as the average number of days between resource request days of work and latest start date.

For example, if a large number of the resource requests in the system have a wide request time frame window (the number of work days between the start date and the end date) and fewer work days required, the start date has some scheduling flexibility. This flexibility provides the Resource Optimization feature with more possible solutions to consider.

Important! We recommend that you install a Process Scheduler domain that is dedicated to run the Resource Optimization feature on a separate physical server, or on a shared physical server with enough dedicated CPU and RAM resources for the Resource Optimization feature.

See *PeopleTools 8.44 Hardware and Software Requirements Guide*, “Appendix D: Financials/ESA Hardware and Software Requirements” on the PeopleSoft Customer Connection website for information on requirements for the Resource Optimization feature.

Understanding Storage of Resource Resume Attachments

PeopleSoft Resource Management enables you to attach a resume document to a resource profile to provide more information about a resource’s skills and background. The resume attachments are indexed so that they can be evaluated by the Verity search engine and the Resource Match engine. Staffing coordinators and managers can also view and print the resume document for a resource when evaluating candidates, and they can attach the resume to an email and send it to a prospective customer.

PeopleSoft Resource Management uses File Transfer Protocol (FTP) servers to store resume documents. To support the attachment of a current resume document to each resource’s profile in Resource Management, you must establish an FTP server with adequate disk storage to store the resume documents.

Note. PeopleSoft supports two types of data storage systems for document attachments—a file server or database tables. However, PeopleSoft Resource Management supports only one option for document attachments—a file server.

You access the URL Maintenance page for the *RS_RESUMES* URL identifier and enter the URL in the format *ftp://<username>:<password>@<machinename>/directory name*. The user name and password are critical, as the system uses these to connect all users to the FTP resume attachment server. The *<machinename>* is the physical name by which the FTP server is identified on the network. You can include the directory name on the server where the resume attachments are stored, or you can store the resume attachments in the root directory of the FTP server. If you store the resume attachments anywhere but the root of the FTP server, it is necessary to append the directory name to the URL.

Note. We recommend that you configure the FTP server on the same platform as the Process Scheduler server—either Windows NT or UNIX. This will help facilitate resume indexing by Verity for the Express Search and Resource Match engine features.

See *PeopleTools PeopleBook: PeopleSoft Server Tools Administration*

CHAPTER 5

Defining PeopleSoft Resource Management Business Units

This chapter provides an overview of PeopleSoft Resource Management business units and discusses how to:

- Define PeopleSoft Resource Management business units.
- Establish human resources (HR) business units without PeopleSoft Human Resources Management (PeopleSoft HRMS).

Understanding PeopleSoft Resource Management Business Units

This section lists prerequisites and discusses:

- PeopleSoft Resource Management business units.
- Project business units.
- PeopleSoft HRMS business units.

Prerequisites

Complete these tasks before defining PeopleSoft Resource Management business units:

1. Establish setIDs.
2. Establish record groups.
3. Define at least one project business unit and project integration template.
4. Update TableSet controls.

PeopleSoft Resource Management Business Units

PeopleSoft Resource Management requires that you establish business unit definitions and options. The steps are:

1. Define the PeopleSoft Resource Management business unit and assign a project integration template.
You must assign a project integration template to create projects from PeopleSoft Resource Management.
2. Specify PeopleSoft Resource Management business unit options.

If you do not integrate with PeopleSoft HRMS, the Resource Management business units populate the HR Business Unit table (BUS_UNIT_TBL_HR).

If you use PeopleSoft HRMS, the HR business units that you set up in HRMS are available to PeopleSoft Resource Management.

You can specify business unit options for service order workflow, assignment approval workflow, and email notifications for assignment processing workflow.

Service Order Routing and Notification Workflow

Service order workflow options control service order routing and notification features. Each service order is keyed by a business unit. PeopleSoft Resource Management determines which set of business unit options to use for a given service order by looking up the setID associated with the service order's business unit. Service orders that belong to one business unit can use different service order workflow options than service orders that belong to another business unit.

Assignment Approval Workflow

Assignment workflow options control resource assignment approval features.

Each assignment is associated with a project business unit. PeopleSoft Resource Management determines which set of business unit options to use for a given assignment by looking up the setID associated with the assignment's business unit. Assignments that belong to one business unit can use different assignment approval options than assignments that belong to another business unit.

Note. For all resources, you must enter a supervisor on the Update Employee Data - Employee Job page before you can use workflow to send assignments for approval or notification to the resource manager.

Assignment Processing Email Notification Workflow

Email notification options define the routing of email notifications during assignment processing. You can also specify whether the resource, resource's supervisor, and project manager are notified when a resource's schedule or assignment status changes. You can also select the statuses that trigger the assignment status change notification.

Project Business Units

In PeopleSoft Resource Management, the Project Business Unit field (BUSINESS_UNIT) is used to determine the list of valid projects and customers that you can associate with an assignment or service order. It also controls workflow and assignment approval options. You must establish a project business unit regardless of whether you install PeopleSoft Project Costing or PeopleSoft Program Management. If the organization has already created project business units, PeopleSoft Resource Management can use them as defined.

You must also specify a project integration template. Integration templates are used in PeopleSoft Resource Management when you create a project from the Service Order component (RS_SERVICE_ORDER).

PeopleSoft HRMS Business Units

In PeopleSoft Resource Management, the system uses the HR business unit to associate resources with organizational units. Even if you don't integrate with PeopleSoft HRMS, you must establish HR business units.

When you implement PeopleSoft Resource Management with PeopleSoft HRMS, you create a system of business unit and setID functionality that matches the way you manage processes related to both resources and HR. The system must also handle the integration issues of using multiple applications.

If you are defining the business organization for PeopleSoft Resource Management and PeopleSoft HRMS for the first time, you must establish business units and setIDs for both applications.

If the organization uses PeopleSoft HRMS to manage employee data, consider using the same business units in the Resource Management database and the HRMS database. A one-to-one correlation between HRMS and Resource Management business units simplifies organizational structure, business rules, and processing.

Defining PeopleSoft Resource Management Business Units

To define PeopleSoft Resource Management business units, use the Business Unit Definition component (RS_BU_OPTIONS) and Business Unit Options component (RS_BUS_UNIT_OPT).

This section lists prerequisites and discusses how to:

- Create PeopleSoft Resource Management business units.
- Specify PeopleSoft Resource Management business unit options.

Prerequisites

Complete these tasks before you define a PeopleSoft Resource Management business unit:

- Create a project integration template.
- Create a project business unit.

Note. You complete these tasks during the implementation of PeopleSoft Project Costing or PeopleSoft Program Management if you use those applications.

See Also

PeopleSoft Project Costing 8.8 PeopleBook, “Defining Project Business Units”

PeopleSoft Project Costing 8.8 PeopleBook, “Structuring PeopleSoft Project Costing,” Creating Templates for Integration with Other Applications

Pages Used to Define PeopleSoft Resource Management Business Units

Page Name	Object Name	Navigation	Usage
Resource Management Definition	RS_BU_OPTIONS	Set Up Financials/Supply Chain, Business Unit Related, Resource Management, Resource Management Definition, Resource Management Definition	Define a PeopleSoft Resource Management business unit and specify the default project integration template.
Resource Management Options	RS_BUS_UNIT_OPT	Set Up Financials/Supply Chain, Business Unit Related, Resource Management, Resource Management Options, Resource Management Options	Specify the PeopleSoft Resource Management business unit options for service order workflow, assignment approval workflow, and email notifications.

Creating PeopleSoft Resource Management Business Units

Access the Resource Management Definition page.

Resource Management Definition

Business Unit: JPN01

Service Order Options

Enter the Projects Integration Template to use when creating a new project from a service order.

Integration: 

Resource Management Definition page

You must create at least one PeopleSoft Resource Management business unit with the same business unit name as a corresponding project business unit.

Service Order Options

Integration

Enter a valid project integration template that is used when you create a project from PeopleSoft Resource Management.

Specifying PeopleSoft Resource Management Business Unit Options

Access the Resource Management Options page.

Resource Management Options

SetID: SHARE

Service Order Workflow Options

- ☒ **Send Service Order to Worklist**
- ☒ **E-Mail Interested Parties**

Assignment Approval Options

- ☒ **Assignment Approval Required**
- ☒ **Date Change Approval Required**

Resource Management Options page (1 of 2)

eMail Notification Options		
Supervisor Notification		
☐ Date Change Notification		
☒ Assignment Status Notification		
eMail Supervisor for listed Statuses		
Assignment Status		
Assigned	+	-
Complete	+	-
Interviewing	+	-
Proposed	+	-
Rejected	+	-
Resource Notification		
☒ Date Change Notification		
☒ Assignment Status Notification		
eMail Resource for listed Statuses		
Assignment Status		
Assigned	+	-
Rejected	+	-
Pending Approval	+	-
Cancelled	+	-
Project Manager Notification		
☒ Date Change Notification		
☒ Assignment Status Notification		
eMail Project Manager for listed Statuses		
Assignment Status		
Assigned	+	-
Interviewing	+	-
Pending Approval	+	-

Resource Management Options page (2 of 2)

Assign the setID for which to specify business unit defaults and options when you enter the Business Unit Options component (RS_BUS_UNIT_OPT).

Service Order Workflow Options

Send Service Order to Worklist

Select to activate automatic routing of a worklist item when a user saves and submits a service order. The item is sent to the person designated as responsible for staffing on the service order. The worklist item serves as a reminder that the order needs to be staffed. A new worklist item for a previously submitted service order is routed when the value in the Responsible for Staffing field changes on the service order.

E-Mail Interested Parties

Select to send an email notification each time the status of the service order changes to these users:

- User designated as responsible for staffing the service order.
- Each of the users listed as an interested party on the service order.

Activating this option also sends an email notification each time the status of the resource request changes to these users:

- Resources who received a manager's recommendation for the resource request.
- Resources who submitted a bid on the resource request.

Assignment Approval Options**Assignment Approval Required**

Select to require that assignments in the business unit be approved by the resource's manager before the assignment status can change to *Assigned*. The resource's manager is defined in the PeopleSoft Job (JOB) record.

If the Assignment Approval Required option is selected, users other than the resource's manager cannot save an assignment with a status of *Assigned*. The status is automatically changed to *Pending Approval*. When an assignment status is changed to *Pending Approval*, a worklist item is routed to the approver (the resource's manager). The worklist item is a notification that the assignment needs to be approved.

The resource's manager can save the resource's assignment that has the status *Assigned*. The system detects that the user is the resource's manager and does not generate a worklist item.

Date Change Approval Required

Select to require that assignment schedule changes be approved by the resource's manager.

If the Date Change Approval Required option is selected, then assignment date changes for a resource with the assignment status *Assigned* require approval by the resource's manager. A worklist item is routed to the approver. Until the resource's manager approves the date change, the new or changed assignment date rows have the status *Pending*, and the pending dates appear on the assignment and the resource's schedule. The pending dates also carry over to the project team if you integrate with PeopleSoft Program Management.

If an assignment date change is rejected, the dates for the assignment, resource schedule, and project team revert back to the prechange assignment schedule.

eMail Notification Options**Date Change Notification**

Click to enable email notification to the resource's manager, the resource, and the project manager if a resource's assignment date changes.

Assignment Status Notification

Click to enable email notification to the resource's manager, the resource, and the project manager if a resource's assignment status changes.

**Email <Supervisor,
Resource, Project
Manager> for listed
Statuses**

Add the assignment statuses for which the system sends email notifications to the resource's manager, the resource, and the project manager indicating that a resource's assignment status has changed.

Establishing HR Business Units Without PeopleSoft HRMS

If you do not integrate with PeopleSoft HRMS, the Resource Management business units populate the HR Business Unit table (BUS_UNIT_TBL_HR).

Perform these steps to establish HR business units if PeopleSoft HRMS is not installed:

1. Define business units in PeopleSoft Project Costing.
2. Select the project business units to define as PeopleSoft Resource Management business units on the Resource Management Definition page.
Assign a project integration template.
3. Specify Resource Management business unit options on the Resource Management Options page.

See Also

PeopleSoft Project Costing 8.8 PeopleBook, "Defining Project Business Units"

CHAPTER 6

Defining the Organization by Using Trees

This chapter provides an overview of the organizational unit tree structure and discusses how to:

- Create and share an organizational unit tree.
- Configure nondepartment organizational units.

See Also

PeopleTools PeopleBook: PeopleSoft Tree Manager

Understanding the Organizational Unit Tree Structure

Among the first decisions that you make when implementing PeopleSoft Resource Management is the determination of how to represent the organizational structure in the application. The organizational unit that you use reflects the organization's structure. You use the organizational unit tree to show that structure and:

- To select a service order owning organization.
- To define resource groups that you can use to selectively search for resources in different parts of the organization.
- To define the groups of resources who appear on the Staffing Workbench - Manage Utilization page.
- To indicate which organizational unit to analyze on reports for scheduled utilization, unassigned resources, assignments ending, assignment listing, resource schedules, and average staffing time.

Select an organizational unit that contains categories for all resources that you manage using PeopleSoft Resource Management. Then design the company's resource structure on the organizational unit tree from the top down using the simple, graphical PeopleSoft Tree Manager. For example, the business structure may include a set of departments, regions, or business functions. The organizational unit tree illustrates the hierarchy.

PeopleSoft Resource Management permits the use of an existing HRMS tree as the organizational unit tree if you integrate with PeopleSoft Human Resources Management (PeopleSoft HRMS). Alternatively, you can create a new organizational unit tree that reflects only the units within the organization that contain resources that you manage with PeopleSoft Resource Management.

The steps to select or create a new organizational unit tree are:

1. Design the resource organization structure.
2. Select the organizational unit.
3. Determine the organizational unit field and record.

4. Determine if an existing tree can serve as the organizational unit tree or if you must create a new tree.
5. Create a new organizational unit tree.
6. (Optional) Provide access to the tree across business units.

Additional setup steps are required if you use an organizational unit tree other than department.

Department Organizational Unit Trees

If you use departments as the organizational unit, and if you are using PeopleSoft Resource Management's integration with PeopleSoft HRMS, you can use the existing PeopleSoft HRMS department tree. Use the TreeMover Application Engine process (TREEMOVER) to copy the existing HRMS department tree to the PeopleSoft Financials and Supply Chain Management (FSCM) database if it does not already exist.

In the FSCM database, you can modify the tree to support the resource management operation.

Important! If you copy an existing tree from the HRMS database to the FSCM database to use as the organizational unit tree, the Department organizational unit tree in PeopleSoft Resource Management is not automatically updated each time that a value changes in the HRMS tree. For example, if a department is added or removed from the HRMS department tree, you must update the tree in Resource Management.

Periodically complete these steps using the TreeMover process to update the organizational unit tree in PeopleSoft Resource Management with changes from the corresponding tree in HRMS:

1. Export the tree from the HRMS database.
2. Import the tree in the FSCM database.

Nondepartment Organizational Unit Trees

If you do not use the HRMS department tree as the PeopleSoft Resource Management organizational unit tree, you can:

- Create a tree that is not based on a tree in PeopleSoft HRMS.
- Use another tree from HRMS.

In this case, create and maintain the tree as described above for the HRMS department tree using the TreeMover process, and then manually update the tree as necessary.

You can use an existing tree from the PeopleSoft HRMS database by using the TreeMover process to move the tree into the FSCM database. You can also define a new tree. To decide whether to use an existing tree or create a new one, determine whether the existing tree hierarchically displays all data needed to support the resource management operation. Create a new tree if the existing tree is significantly different from the resource hierarchy.

Use one of the fields on the Job record (JOB) to map organizational units to resources. The Job record contains the PeopleSoft HRMS data for department, location, job code, and a variety of other attributes for every employee in the organization. If none of the fields in the Job record can map organizational units to resources, you can use any record and field to organize the resources.

You can select these fields in the Job record as the organizational unit field:

- Department (DEPTID)

- Job Code (JOBCODE)
- Location Code (LOCATION)
- Supervisor ID (SUPERVISOR_ID)

Note. Every resource that you track in PeopleSoft Resource Management must belong to an organizational unit that appears in the organizational tree. For example, if the Job Code field is the organizational unit, you must identify a job code for every resource.

Additional Setup Steps for Nondepartment Organizational Unit Trees

Complete these additional setup steps if you use an organizational unit other than department:

- Identify or create a valid employee-organization record.
- Modify the organization structure definition on the Installation Options - Resource Management page.
- Modify the organizational unit field name label.
- Modify the Structured Query Language (SQL) definition called Organizational Tree, Organizational Unit Description (RS_ORGTREE_DEPT_SQL) if the organizational unit record is *not* keyed by setID.

Complete these additional setup steps if the nondepartment organizational unit record does not use the Description field (DESCR) to store the organizational unit's title or name:

- Modify the field name that stores the organizational unit description in the Organizational Tree, Organizational Unit Description SQL definition and the Organizational Unit Description SQL definition (RS_ORGDTL_DESCR_SQL).
- Modify the PeopleCode with the organizational unit field.

Creating and Sharing the Organizational Unit Tree

This section discusses how to create the tree structure and define and share the tree.

Pages Used to Create and Share the Organizational Unit Tree

Page Name	Object Name	Navigation	Usage
Structure - Tree Structure Properties	PSTREESTRCTDEFN	Tree Manager, Tree Structure, Create New Tree Structure, Structure - Tree Structure Properties	Specify the tree type, key fields, and navigation options.
Nodes - Tree Nodes	PSTREESTRCTNODE	Tree Manager, Tree Structure, Create New Tree Structure, Nodes, Nodes - Tree Nodes	Specify the page and record used to enter and store information about tree nodes.
Details - Tree Details	PSTREESTRCTDETL	Tree Manager, Tree Structure, Create New Tree Structure, Details, Details - Tree Details	For detail trees, specify the page and record used to enter and store detail information. Note. This page is not used for node-only trees.
Tree Definition and Properties	PSTREEDEFN	Tree Manager, Tree Manager, Tree Definition, Tree Definition and Properties	Specify general attributes for a tree.
Enter Root Node for Tree	PSTREEROOTLEVELS	Click OK on the Tree Definition and Properties page.	Define the root node.
TableSet Control - Tree	SET_CNTRL_TABLE2	PeopleTools, Utilities, Administration, TableSet Control, Tree	Associate specific trees with a set control value.
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager, Tree Manager	View or modify existing trees.

Creating the Tree Structure and Defining and Sharing the Tree

Follow these steps to create a new organizational tree:

1. Create the tree structure.

The tree can be either a detail-value (summer) tree or a node-oriented (winter) tree. If the tree contains *details*, enter the organization unit field name as the Details field name. If the tree contains only *nodes*, enter the organization unit field name as the Nodes field name.

You can select SetID Indirection as an additional key field to use the setID to share the organizational unit tree definition across business units.

2. Define the tree.
3. Specify the root node.
4. Insert the tree nodes that define the hierarchy of the tree.
5. Attach detail values as so-called *leaves* on the nodes for a detail-value (summer) tree.
6. Share the tree across business units.

This step is necessary only if you use an organizational unit tree that is keyed by setID.

Associate the organizational unit tree with the business units that require access to the tree for PeopleSoft Resource Management.

To share the tree across business units, access the TableSet Control component and select a business unit value that uses the organizational unit tree. Access the TableSet Control - Tree page and enter the organizational unit tree name and tree setID in the Tree Controls grid.

You do not need to attach the tree to the setID set control values for the organization—only to the business units that are affected by PeopleSoft Resource Management.

Note. On the TableSet Control - Tree page, enter the setID before you look up the tree name. If you do not enter the setID first, only trees that are not keyed by a setID appear.

Configuring Nondepartment Organizational Units

This section discusses how to:

- Identify or create a valid Employee-Organization record
- Modify the organization structure definition.
- Modify the organizational unit field name.
- Modify SQL definitions with the organizational unit field.
- Modify PeopleCode with the organizational unit field.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up PeopleSoft Resource Management Installation Options

PeopleTools PeopleBook: PeopleSoft Application Designer

Page Used to Configure Nondepartment Organizational Units

Page Name	Object Name	Navigation	Usage
Installation Options - Resource Management	INSTALLATION_RS	Set Up Financials/Supply Chain, Install, Installation Options, Resource Management	Modify the organization unit field name, record name, tree name, or Employee-Organization record name as required.

Identifying or Creating a Valid Employee - Organization Record

The PeopleSoft system comes with the Employee-Organization record (RS_ORGEMPLBR_VW) to keep track of the organizational unit to which each resource belongs. The Employee-Organization record is a view of the Job record that identifies the department for every employee. The Job record is the PeopleSoft HRMS record that identifies the department, location, job code, and a variety of other attributes for every employee in the organization. If the organizational field is Department (DEPTID), you can use the Employee-Organization record as delivered.

If you cannot use the delivered Employee-Organization record, you must either modify the definition and SQL text of the Employee-Organization record, or you must use a different record. The Employee-Organization record does not need to be a view. The minimum requirements for a valid Employee-Organization record are:

- The record is keyed by the employee ID (EMPLID) of the resource.
- The record includes the resource's organization unit in the appropriate organization unit field, such as Department or Location Code (LOCATION).
- (Optional) The record includes the setID of the resource's organization unit in the Set Control field (SETCNTRLVALUE).

This is required if the organizational unit record is keyed by setID, such as the Departments record (DEPT_TBL). Some organizational units, such as supervisor ID, may not have an organizational unit record that is keyed by setID.

- The record contains rows for all resources.

The Employee-Organization record can have more than one row per resource, provided that the correct row to use can be identified at any given time. You can use multiple rows per resource by using additional key fields in the record. PeopleSoft Resource Management supports the use of the following additional key fields:

- Employee Record Number field (EMPL_RCD).

If there are multiple rows in the Employee-Organization table for a given resource, each with a different employee record number, you use only the row with the employee record number that is defined for the resource in PeopleSoft Resource Management.

- Effective Date (EFFDT).

If there are multiple rows in the Employee-Organization table for a given resource, each with a different effective date, you typically use only the row that is current. The effective date companion status field—Employee Status (EMPL_STATUS)—is also supported. This field is used to indicate active or inactive employees.

- Effective Sequence Number (EFFSEQ).

If there are multiple rows in the Employee-Organization table for a given resource, each with a different effective sequence number, you use only the row with the maximum effective sequence number. If effective dating is used, you use only the row with the maximum effective sequence number within the same effective date row.

The record must not contain any other key fields.

Modifying the Organization Structure Definition

If you change the organizational unit field, record, or tree, you must modify the values in the Organizational Structure definition on the Installation Options - Resource Management page.

This table lists the fields and delivered values in the Organizational Structure definition:

Field	Delivered Value
Organization Field Name	DEPTID
Organizational Units Record	DEPT_TBL
Organization Structure Name	CONSULTING
Employee-Organization Record	RS_ORGEMPLBR_VW

Modifying the Organizational Unit Field Name

Use PeopleSoft Application Designer to modify the Organization Field Name (ORG_FIELDNAME) if required. Change the Long Name field and the Short Name field of the label ID (ORG_LABEL) to reflect the new label (for example, *Location* and *Loc*).

Modifying SQL Definitions with the Organizational Unit Field

The Organizational Tree, Organizational Unit Description SQL definition (RS_ORGTREE_DEPT_SQL) joins the organizational unit record to the Employee-Organization record. The Organization Tree Detail SQL definition (RS_ORGDTL_DESCR_SQL) retrieves the organizational unit description.

Use PeopleSoft Application Designer to make these changes to the SQL definition if required:

- If the organizational unit record is *not* keyed by setID, remove the `A.SETID = :4` portion of the Organizational Tree, Organizational Unit Description SQL definition.

For example, if you select the Supervisor ID field as the organizational unit, remove `A.SETID = :4` from the Organizational Tree, Organizational Unit Description SQL definition. The Supervisor ID field is not contained in a record that is also keyed by setID.

- If the Description field is *not* used to store the organizational unit's title or name, modify the `A.DESCR` portion of the Organizational Tree, Organizational Unit Description SQL definition and the Organization Tree Detail SQL definition.

For example, if the Supervisor ID field is selected as the organizational unit, manager names can be stored in the Name field (NAME) on the Personal Data record (PERSONAL_DATA). Therefore, change the value `A.DESCR` to the value `A.NAME`.

Modifying PeopleCode with the Organizational Unit Field

If the Description field is *not* used to store the organizational unit's title or name, use PeopleSoft Application Designer to make these changes to the PeopleCode if required:

- Modify the `RS_INSTALL_WRK.FIND_OBJECTS_PB.FieldChange` PeopleCode program. Change the first parameter in the function call `resolve_wildcard( )` from `Field.DESCR` to the field name that stores the organizational unit's title, description, or name.
- Modify the function `ManageTree( )` function in the `FUNCLIB_RS.TREE_NAME.FieldFormula` PeopleCode program. Change the field name in this line of code—`&NodeDescr =`

`&DtldDescrRec.DESCR.Value;`—from *DESCR* to the field name that stores organizational unit name values. For example, if the *NAME* field is used to store organizational unit names—because the organizational unit is Supervisor ID, the code is `&NodeDescr = &DtldDescrRec.GetField(Field.NAME).value.`

CHAPTER 7

Understanding Access-Related Features of PeopleSoft Resource Management

To provide PeopleSoft Resource Management users with access to application functions essential to performing their jobs, you create roles and assign them to individual user profiles. Inherent in each role is access to the application pages and processes required to perform the job tasks. Setting up user access requires that you understand shared data and access to PeopleSoft applications.

This chapter discusses:

- Permission lists.
- Component interface permissions.
- Web library permissions.
- Row-level security.
- User profiles and roles.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Securing Your System”

PeopleTools PeopleBook: Security Administration

Permission Lists

Permission lists are the building blocks of end user security authorizations. You first create an inventory of permission lists, and then create user roles. When creating permission lists, consider each type of role that uses the permissions. Each permission list identifies the pages that individuals assigned to a role can access. All permissions required for a particular role must be assigned to that role; otherwise, a user may not be able to use the functionality offered in PeopleSoft Resource Management.

PeopleSoft Resource Management delivers preconfigured permission lists that grant access to various pages. These permission lists support the functional roles delivered with the application. Permission lists control access to pages, web libraries, components, and other objects as necessary to support an organization’s unique roles. To modify the access for a user’s role, you modify a permission list linked to the role. However, because the delivered permission list may be updated to include new features in future application releases, it is recommended that you do not modify the delivered permission list. Instead, duplicate the delivered permission list and modify the copy to meet your needs.

Important! If you modify a permission list, you change the access for all users who are assigned to roles that are associated with the permission list.

This table lists the delivered permission lists that provide access to PeopleSoft Resource Management, the purpose of each permission list, and the roles (if any) that are associated with each permission list:

Permission List	Description	Purpose	Roles
EPRS1000	PeopleSoft Resource Management All Users	Provides access to the graphical navigation provided via the PeopleSoft Resource Management standard navigation page and PeopleSoft Workflow worklist. Provides access to component interfaces and web libraries.	All PeopleSoft Resource Management Users
EPRS2100	RS Service Order Management	Provides user with create and update access to service order, customer maintenance, and service order defaults pages.	Staffing Coordinator, Practice Manager, Project Manager
EPRS2300	RS Service Order Review Orders	Provides view-only access to users to review service orders and regular access to change their default settings for service orders.	Resource, Resource Manager
EPRS3000	RS Assignments	Enables users to create and manage assignments.	Staffing Coordinator, Practice Manager, Project Manager
EPRS4100	RS Schedules Managers View	Enables users in managerial roles to access other users' schedules.	Resource Manager, Practice Manager
EPRS4200	RS Schedules Resource View	Enables users to access only their own schedules for review and update.	Resource
EPRS4300	RS Schedules Display Only	Enables users to view but not update resource schedules.	Project Manager, Staffing Coordinator

Permission List	Description	Purpose	Roles
EPRS5100	RS Worker	Enables resources to review and bid on open resource requests and to update and manage their own resource profiles.	Resource
EPRS5200	RS Worker Manager	Enables managers to review resource profiles, submit recommendations, and work with assignments.	Resource Manager, Practice Manager
EPRS5300	RS Worker Display Only	Allows view-only access to resource profiles.	Project Manager, Staffing Coordinator
EPRS6000	RS Pagelets	Allows access to PeopleSoft Portal Pack pagelets that come with PeopleSoft Resource Management.	Resource Manager, Practice Manager, Staffing Coordinator
EPRS7000	RS Without HRMS	Enables the use of PeopleSoft Resource Management without an integrated human resources management system (HRMS).	Administrator Note. The Administrator role is not directly associated with this permission list because administrators can access all pages using the ALLPAGES permission list.
EPRS7100	RS Interactive Reports	Enables users to run PeopleSoft Resource Management reports that show trend information, such as the Scheduled Utilization report, the Unassigned Resources report, and the Most Requested Competencies report.	Project Manager, Resource Manager, Staffing Coordinator, Practice Manager

Permission List	Description	Purpose	Roles
EPRS7200	RS Operational Reports	Enables operations users to run reports that are applicable to managing the day-to-day operations of a professional services organization, such as the Service Order Listing report and the Assignments Ending report.	Project Manager, Resource Manager, Staffing Coordinator, Practice Manager
EPRS8000	RS Optimization Report	Provides access to the Resource Optimization report.	Staffing Coordinator, Resource Manager, Practice Manager
EPRS9000	Resource Management Setup	Enables a user to set up or change installation options and preferences.	Administrator Note. The Administrator role is not directly associated with this permission list because administrators can access all pages using the ALLPAGES permission list.
EPRS9100	Resource Management BU (business unit) Setup	Enables a user to set up business rules and preferences.	Administrator Note. The Administrator role is not directly associated with this permission list because administrators can access all pages using the ALLPAGES permission list.
EPRS9200	RS Optimization Setup	Enables a user to establish resource optimization sets and objectives and to schedule resource optimization processes.	Administrator Note. The Administrator role is not directly associated with this permission list because administrators can access all pages using the ALLPAGES permission list.

Component Interface Permissions

Component interfaces enable the use of PeopleSoft components (sets of pages grouped for a business purpose) for synchronous access from another application. Component interfaces encapsulate PeopleSoft data and business processes, and they hide the details of the underlying pages and data. You can use component interfaces to integrate a PeopleSoft application with other PeopleSoft applications or with external systems, such as systems written in Java , C/C++, Visual Basic, and XML.

Component interfaces are also used by PeopleSoft Resource Management application messages on the application server and by application engines on the Process Scheduler server.

Note. Refer to the documentation on enterprise integration points (EIPs) for a list of component interfaces that you can use to create custom interfaces to other applications.

See [Chapter 10, “Understanding EIPs,”](#) page 99.

Component Interfaces Used by PeopleSoft Resource Management

Certain pages in PeopleSoft Resource Management depend on the functionality of component interfaces. Component interface security is managed independently of page security. In order for a page to function properly, the user must have access to the page and to any component interfaces used by the page. For simplicity, PeopleSoft Resource Management grants all users access to all PeopleSoft Resource Management component interfaces. System security is managed by allowing or restricting access to specific PeopleSoft Resource Management pages based on user roles.

These are the component interfaces that PeopleSoft Resource Management pages use:

Component Interface	Description	Purpose
PROJECT_GENERAL	Create Project	Creates a new project (either using autonumbering or using a specified project ID) from a service order, using the business unit on the service order for the project.
RESOURCE_PROFILE	Resource Profile	Updates or deletes the work history on the resource profile.

Component Interface	Description	Purpose
RS_ASSIGN_BC	Create and Get Assignment	Creates an assignment using <i>NEXT</i> as the assignment ID until the assignment is saved. At that time, the assignment is autonumbered. Retrieves an existing assignment for modification. This component interface is used by the Staffing Workbench and integration with PeopleSoft Program Management, PeopleSoft Project Costing, and PeopleSoft Services Procurement.
RS_BLDSCPFND	Populate Scope Table	Uses a list of tree nodes or detail values to determine the data that populates the Scope table (RS_DF_SCOPE_W). This is used only for PeopleSoft Resource Management reports.
RS_CLEARSESND	Clear Scope Table	Takes a session ID and clears the Scope table.
RS_CONV_PERSON	Convert Person to Resource	Converts PeopleSoft Services Procurement service providers to resources.
RS_REPORT_TBL_INTFC	Manage Report Temp Table	Inserts information or deletes information from the temporary reporting table RS_2010EMPL_TMP.
RS_SCHEDULE_CI	PeopleSoft Resource Management Schedule	Creates a new appointment using <i>NEXT</i> as the new appointment ID (autonumbered). Retrieves an existing appointment for modification. This component interface is also used to create and update assignment entries on the resource schedule.
RS_SERVICE_ORDER	Service Order Save As	Saves the existing service order as a new service order with the <i>NEXT</i> service order ID (autonumbered). The system copies data from the existing service order into the new service order.

Component Interface	Description	Purpose
RS_SESSION	Unique Session Number	Creates a unique number that is used to key different work or temporary tables used by online and batch processes throughout PeopleSoft Resource Management.
RS_WRKR_CREATE	Establish Employee as Resource	Establishes an employee as a resource. This is used in the integration with PeopleSoft Services Procurement when converting a service provider to a resource.
RS_WRKR_MGMT	Maintain Resource Eligibility	Manages dates of resource eligibility that are used in the integration with PeopleSoft Services Procurement when creating an assignment for a service provider.

Component Interfaces Used by Server Processes

These component interfaces must be included in a permission list that is associated with the user ID that is used to run the application server or Process Scheduler server:

Component Interface	Description	Purpose
FACTOR_FIT_CACHE	Factor Fit Cache	Updates the Factor Fit Cache and Cache Status tables. The cache and cache status are updated whenever factor fit scores are recalculated, either from the Refresh Match Cache Application Engine process (RS_DF), during a search for resources, or as changes are made to certain resource and resource request data.
RS_BLDSCPFND	Populate Scope Table	Uses a list of tree nodes or detail values to determine the data that populates the Scope table (RS_DF_SCOPE_W). This is used only for PeopleSoft Resource Management reports.
RS_CLEARSESND	Clear Scope Table	Takes a session ID and clears the Scope table.

Component Interface	Description	Purpose
RS_SCHEDULE_CI	PeopleSoft Resource Management Schedule	Creates a new appointment using <i>NEXT</i> as the new appointment ID (autonumbered). Retrieves an existing appointment for modification. This component interface is also used to create and update assignment entries on the resource schedule.
RS_SESSION	Unique Session Number	Creates a unique number that is used to key different work or temporary tables used by online and batch processes throughout PeopleSoft Resource Management.

Web Library Permissions

A web library is a derived/work record that contains iScripts, which are specialized PeopleCode functions that generate dynamic web content. Proper web library access is required to access PeopleSoft applications with a web browser. Web library security is managed independently of page security. For simplicity, PeopleSoft Resource Management grants all users access to the PeopleSoft Resource Management web library.

This is the web library that PeopleSoft Resource Management pages use:

Web Library	Description	Purpose
WEBLIB_RS	PeopleSoft Resource Management Web Library	Required by the Monthly Schedule page.

You use other web libraries to access PeopleSoft pages outside PeopleSoft Resource Management.

Row-Level Security

To establish security, you must first decide which level of security to establish throughout the system, which key fields to secure, and whether security is defined through user IDs or permission lists. With row-level support, you can implement security to provide individual users or permission lists with access to a table, but you do not have to provide access to all rows in the table. This type of security is typically applied to tables that hold sensitive data. For example, you can implement row-level security in PeopleSoft Resource Management to restrict project business units that are available for assignments and service orders.

The PeopleSoft system determines which data permissions to grant to a user by examining the primary permission list and row security permission list. The permission list that is used varies by application and data entity, such as employee, customer, or business unit.

Note. Row-level security *does not* restrict the data that is selected by batch processes.

User Profiles and Roles

A user's profile determines the pages that the user can access. To set up user and role security:

- Create user profiles in the User Profile Maintenance component (USERMAINT).
- Assign a role to each user profile.
- Link the roles to permission lists.

PeopleSoft Resource Management comes with several preconfigured roles based on functional tasks that are typically performed by an employee who is assigned to that role. Each preconfigured role comes with access to the set of pages within the application that correspond to the functional tasks of that role. For example, resources can update their own profiles and schedules, and they can view information about open resource requests or assignments. Similarly, staffing coordinators can fulfill service orders, create assignments, and view resource profiles and schedules.

User profiles define individual PeopleSoft users. After you create user roles, create user profiles and associate them with roles. The values for a user's page access and authorized actions, such as add, update, or review, are inherited from the associated roles.

You can assign multiple roles to a user. User permissions are based on the combined permissions that are assigned to all of the user's roles.

This table lists the sample roles that come with PeopleSoft Resource Management:

Role	Description
Administrator	Manages system security; specifies installation and business unit options; administers batch processes.
Resource	Updates the resources' own profile and schedule; views details about open service orders; submits bids for service orders. (An identical role is defined in PeopleSoft HRMS.)
Resource Manager	Manages resource utilization; views and modifies resource schedules and profiles; approves assignments; submits recommendations for resources. (An identical role is defined in PeopleSoft HRMS.)
Staffing Coordinator	Fulfills service orders, performs express searches, and creates assignments.
Practice Manager	Performs the tasks of a resource manager and staffing coordinator.

Note. If you integrate with PeopleSoft HRMS, you must also establish the same user IDs and passwords in the HRMS database. If you install a directory service that adheres to Lightweight Directory Access Protocol (LDAP), the LDAP server manages the creation and assignment of roles to users.

CHAPTER 8

Setting Up PeopleSoft Resource Management with PeopleSoft HRMS

This chapter provides an overview of PeopleSoft Resource Management with PeopleSoft Human Resources Management (PeopleSoft HRMS) and the Manage Competencies business processes, and it discusses how to:

- Update PeopleSoft HRMS permission lists and roles.
- Activate the Single Signon feature.

Note. The tasks that are discussed in this chapter are optional. If you maintain employees and non-employees in PeopleSoft Resource Management only, you do not need to complete these tasks. You can proceed to the next step in the implementation.

Understanding PeopleSoft Resource Management and PeopleSoft HRMS

PeopleSoft Resource Management integrates with PeopleSoft HRMS and the Manage Competencies business processes of PeopleSoft HRMS. The integration between the HRMS database and the PeopleSoft Financials and Supply Chain Management (FSCM) database requires careful planning before you design and implement configurations in both databases. Key data records exist in both databases, and they are maintained asynchronously using application messages.

This section lists prerequisites and discusses:

- Resource profiles.
- Data synchronization with the employee source database.
- The Competency tree.

Note. To integrate with PeopleSoft HRMS prior to version 8, you must create a data bridge to map the appropriate PeopleSoft Resource Management tables to the HRMS tables and exchange data.

Prerequisites

This section lists prerequisites for integrating with PeopleSoft HRMS:

- Install PeopleSoft HRMS 8 or later.
- On the Installation Options - Resource Management page, select one of the following options as the employee source database:

- PeopleSoft HCM 8.0+

Select this option to maintain employee and non-employee source data only in PeopleSoft HRMS.

- PeopleSoft HCM 8.0+ and PeopleSoft Resource Management

Select this option to maintain employee data records in PeopleSoft HRMS, and non-employee data records in HRMS and PeopleSoft Resource Management.

- Activate the Publication and Subscription services on the PeopleSoft Resource Management and PeopleSoft HRMS application servers.
- Activate the data synchronization application messages.

If you use PeopleSoft HRMS Competency Management:

- Add PeopleSoft Resource Management competency type codes and definitions in PeopleSoft HRMS if they are not already defined in the HRMS database.
- Establish individual PeopleSoft Resource Management competencies and accomplishments in PeopleSoft HRMS if they are not already defined in the HRMS database.
- Grant users access to the HRMS database to maintain resource competencies and accomplishments.

Note. If you maintain non-employee data in either PeopleSoft HRMS and PeopleSoft Resource Management, any new non-employee record that is created in Resource Management must be maintained in Resource Management. Any new non-employee record that is created in HRMS must be maintained in HRMS.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up PeopleSoft Resource Management Installation Options

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies

PeopleTools PeopleBook: PeopleSoft Application Designer

PeopleTools PeopleBook: PeopleSoft Server Tools Administration

Resource Profiles

The resource profile is derived in part from information maintained in the employee source database. The PeopleSoft HRMS database tables that store resource profile values are discussed in a subsequent chapter in this PeopleBook.

When you update competency and accomplishment information stored in PeopleSoft HRMS from the resource profile in PeopleSoft Resource Management, access to the HRMS database is achieved through the Single Signon feature.

See Also

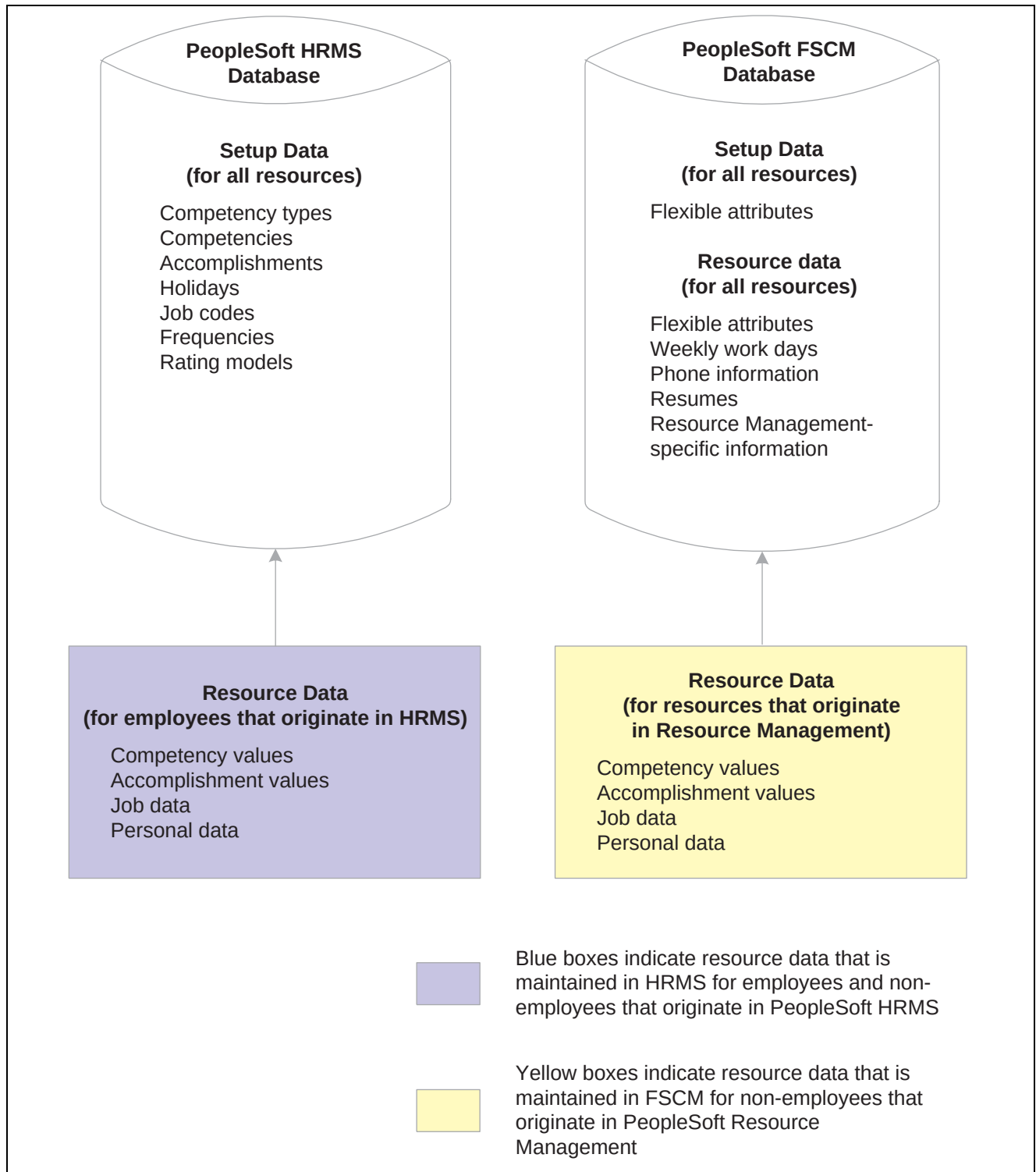
Chapter 18, “Maintaining Resource Profiles,” Resource Profile Design, page 212

Data Synchronization with the Employee Source Database

If you maintain employee and non-employee data in PeopleSoft HRMS only, the full synchronization process updates the resources' competencies and accomplishments in PeopleSoft Resource Management with information from HRMS.

If you maintain non-employees (employee IDs with the status *N*) in the HRMS and FSCM databases, the full synchronization process does not update non-employee data for employee IDs that originate in PeopleSoft Resource Management. In this case, the process updates only employee and non-employee data that originates in HRMS.

This diagram illustrates the source of employee and non-employee data if you maintain non-employees in the HRMS and FSCM databases:



Managing employee data stored in HRMS and FSCM databases

You can perform these tasks in PeopleSoft Resource Management for all resources:

- View and modify competency and accomplishment data.

For employees and non-employees who originate in PeopleSoft HRMS, the system transfers you to the HRMS database to modify the data.

For non-employees who originate in PeopleSoft Resource Management, you remain in the FSCM database to modify the data.

- Establish resources and maintain eligibility.
- View and modify Resource Management-specific resource profile data and flexible attribute values.
- View job and personal data.

For non-employees who originate in PeopleSoft Resource Management, you can also modify job and personal data.

Note. You must use the PeopleSoft HRMS system to modify job and personal data for employees and non-employees who originate in HRMS.

The Competency Tree

An organization can have many competencies, which is why the Competency tree exists in PeopleSoft HRMS. The Competency tree facilitates the location and classification of competencies in HRMS and PeopleSoft Resource Management.

Competency types are created as nodes on the Competency tree. Competencies are detailed values that are associated with nodes. You can select competencies or competency types from the tree to associate with resources.

The Competency tree that is delivered with the PeopleSoft system has multiple nodes. Each node represents a competency type, and the detail values (or competencies) are dynamically identified. Each time that you create a new competency, it automatically appears on the tree—as long as you associate the competency with a competency type that exists on the tree.

Important! The Competency tree that exists in the HRMS database must also exist in the FSCM database. The tree must be named *COMPETENCY* and use the structure ID named *COMPETENCY*.

The TreeMover Application Engine process (TREEMOVER) exports the Competency tree from HRMS and imports it into PeopleSoft Resource Management. Trees are not synchronized using application messages because trees are maintained in PeopleTools tables, and there are different portions of trees that can be synchronized between databases.

During PeopleSoft Resource Management implementation, export the Competency tree from the HRMS database using PeopleSoft TreeMover, which exports the blueprint for the tree to a file. Then import the Competency tree in the FSCM database using the TreeMover process to extract the tree from the HRMS export file and load it into the FSCM database. After the initial synchronization of the tree, periodically perform the export and import steps to update the Resource Management Competency tree with the latest changes from the HRMS Competency tree.

To determine how frequently to update the tree:

- Determine how frequently you add new competency types.
- Determine how up-to-date the competency type information must be in the PeopleSoft Resource Management tree.

Most organizations don't need to update the Competency tree in Resource Management more than a few times per year because adding a new competency type typically occurs only when an organization offers a new product or provides a new service.

See Also

PeopleTools PeopleBook: PeopleSoft Tree Manager

Updating PeopleSoft HRMS Permission Lists and Roles

This section provides a list of components used in PeopleSoft HRMS by PeopleSoft Resource Management.

PeopleSoft Resource Management users access PeopleSoft HRMS pages to update resource competencies and accomplishments. Users need access to all pages in the components that are listed in the following table. The table lists the component purpose and name, menu name, and the users in PeopleSoft Resource Management.

Purpose	Typical Users	Menu	Component
Maintain resource competencies.	Resource	ROLE_EMPLOYEE	HR_COMPETENCIES
	Resource Manager Practice Manager	MANAGE_COMPETENCIES_(GBL)	COMPETENCIES
Set up competencies.	Administrator	SETUP_HRMS	COMPETENCY_TBL
	Competencies Setup Administrator	SETUP_HRMS	CM_TYPE_TABLE
	Competency Types Setup Administrator	SETUP_HRMS	RATING_MDL_TBL
Maintain resource education.	Resource	ROLE_EMPLOYEE	HR_EDUCATION
	Resource Manager Practice Manager	MANAGE_COMPETENCIES_(GBL)	EDUCATION
Set up education.	Administrator	SETUP_HRMS	SCHOOL_TABLE
	School Setup Administrator	SETUP_HRMS	SCHOOL_TYPE_TABLE
	School Types Setup Administrator	SETUP_HRMS	DEGREE_TABLE
	Degree Setup Administrator	SETUP_HRMS	MAJOR_TABLE
Maintain resource honors and awards.	Resource	ROLE_EMPLOYEE	HR_HONORS_AWARDS

Purpose	Typical Users	Menu	Component
	Resource Manager Practice Manager	MANAGE_ COMPETENCIES_(GBL)	HONORS_AWARDS
Set up honors and awards.	Administrator	SETUP_HRMS	HONOR_AWARD_TABLE
Maintain resource languages.	Resource	ROLE_EMPLOYEE	HR_LANGUAGES
	Resource Manager Practice Manager	MANAGE_ COMPETENCIES_(GBL)	LANGUAGES
Set up languages.	Administrator	SETUP_HRMS	LANGUAGE_TABLE
Maintain resource licenses.	Resource	ROLE_EMPLOYEE	HR_LIC_CERT
	Resource Manager Practice Manager	MANAGE_ COMPETENCIES_(GBL)	LICENSES_CERTIFS
Set up licenses.	Administrator	SETUP_HRMS	LICENSE_CERTIF_TBL
Maintain resource memberships.	Resource	ROLE_EMPLOYEE	HR_MEMBERSHIPS
	Resource Manager Practice Manager	MANAGE_ COMPETENCIES_(GBL)	MEMBERSHIPS
Set up memberships.	Administrator	SETUP_HRMS	MEMBERSHIP_TABLE
Set up tests and results.	Administrator	SETUP_HRMS	TEST_TABLE

Activating the Single Signon Feature

The Single Signon feature enables a user to log in to one PeopleSoft application server with a user ID and password and, after authentication, access a second PeopleSoft application server without entering a user ID or password.

This section discusses:

- Activating the Single Signon feature for PeopleSoft HRMS 8.8.
- Activating the Single Signon feature for PeopleSoft HRMS 8.3.

Activating the Single Signon Feature for PeopleSoft HRMS 8.8

These are the basic steps to activate the Single Signon feature if you integrate with PeopleSoft HRMS 8.8:

1. Create the PeopleSoft Resource Management (subscribing) message node and the PeopleSoft HRMS (publishing) message node in the HRMS and FSCM databases.

Message nodes define the databases with which you integrate. You must create both message nodes—one for PeopleSoft HRMS and one for PeopleSoft Resource Management—in the subscribing database (FSCM) and the publishing database (HRMS).

Important! You must create the same HRMS and Resource Management message node names in both databases. If a password is defined for the message node, then it must match the password in the corresponding database.

2. Specify the message nodes on the Single Signon page in the Single Signon component (SINGLE_SIGNON) that you created in the previous step for use by the Single Signon feature in the HRMS and FSCM databases.

Important! You must specify the same HRMS and Resource Management message node names in both databases.

3. Follow these steps to specify in the FSCM database the location of the HRMS database:
 - a. Obtain the universal resource indicator (URI) of the HRMS database.
 - b. In the FSCM database, open the *HRMS* node definition and enter the HRMS database URI in the Content URI Text field (URI_TEXT_PSC) in the following format:

`http://<webservermachinename>/psc/<domain name>`

Select *PIA* as the node type.

Important! In this step, you must open the node definition for the specific node named *HRMS* to enter the HRMS database URI and node type.

The steps are different if you set up the Single Signon feature with two databases and two or more web servers.

See *PeopleTools PeopleBook: Security Administration*.

Activating the Single Signon Feature for PeopleSoft HRMS 8.3

The steps to set up the Single Signon feature are different if you integrate with PeopleSoft HRMS 8.3 and PeopleTools 8.1. For example:

- The HRMS database URI has the following format:
`http://<webservermachinename>/servlets/iclientservlet/<domain name>`
- The node type is *ICType*.

CHAPTER 9

Setting Up PeopleSoft Resource Management Without an Integrated HRMS

You can establish the employee source data tables in PeopleSoft Resource Management to capture accomplishments, competencies, and employee data even if you don't integrate with PeopleSoft Human Resources Management (PeopleSoft HRMS).

This chapter provides overviews of using PeopleSoft Resource Management without PeopleSoft HRMS and application setup and employee data tables, and discusses how to:

- Establish application setup tables for accomplishments.
- Establish application setup tables for competencies.
- Organize competencies using the Competency tree.
- Establish application setup tables for work definitions.
- Create employee data files.

Note. The tasks that are discussed in this chapter are optional. If you maintain employees and non-employees in PeopleSoft HRMS only, you do not need to complete these tasks.

If you maintain non-employees in both databases—PeopleSoft HRMS and PeopleSoft Resource Management—you create employee data files by completing the tasks that are discussed in this chapter.

If you maintain employees and non-employees only in PeopleSoft Resource Management, you must complete all the tasks that are discussed in this chapter.

Understanding PeopleSoft Resource Management Without PeopleSoft HRMS

This section lists a prerequisite and discusses resource profiles.

Prerequisite

On the Installation Options - Resource Management page, select *PeopleSoft Resource Management* as the source for employee and non-employee data. This disables the enterprise integration points (EIPs) between PeopleSoft HRMS and PeopleSoft Resource Management tables, and it enables the processing rules for PeopleSoft Resource Management to serve as the employee data source.

Note. If you use PeopleSoft 8 HRMS or higher, take advantage of the built-in integration with PeopleSoft Resource Management to manage resources and resource competencies. PeopleSoft Resource Management employs EIPs to request and send data between the PeopleSoft Financials and Supply Chain Management (FSCM) database (where PeopleSoft Resource Management information resides) and the PeopleSoft HRMS database (where employee and competency information resides).

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up PeopleSoft Resource Management Installation Options

Resource Profiles

Resource profile information is maintained in the FSCM database if you do not use PeopleSoft HRMS. The FSCM database tables that store resource profile values are discussed in a subsequent chapter in this PeopleBook.

See Also

Chapter 18, “Maintaining Resource Profiles,” Resource Profile Design, page 212

Understanding Application Setup and Employee Data Tables

This section discusses:

- Steps for employee data source implementation.
- Accomplishments.
- Competencies.
- The Competency tree (COMPETENCY).
- Work definition tables.
- Employee data tables.

Steps for Employee Data Source Implementation

You must establish tables from which PeopleSoft Resource Management draws information about resources and their qualifications. The basic steps to define the application setup and employee data tables are:

1. Complete application setup tables for each resource accomplishment that you track:
 - a. Honors and awards.
 - b. Memberships.
 - c. Languages.
 - d. Licenses and certifications.
 - e. Tests.

- f. Degrees.
 - g. Majors.
 - h. Schools.
2. Complete application setup tables for resource competencies:
 - a. Competency types.
 - b. Competencies.
 - c. Rating models.
3. Complete application setup tables for other work definitions:
 - a. Frequency.
 - b. Job codes.
 - c. Holidays.
4. Complete employee data files.

Accomplishments

An accomplishment is an objective, measurable achievement. The accomplishment setup tables identify the accomplishments that resources can include in their resource profiles or that users can list as requirements for the resources they request for an assignment. The Resource Match engine compares a resource's accomplishments with the accomplishments requested for an assignment.

There are six types of accomplishments:

- Education (including degrees, majors, and schools).
- Licenses and certifications.
- Memberships.
- Languages.
- Honors and awards.
- Tests.

Specific accomplishments for education, licenses and certifications, memberships, and languages can be included in Resource Match engine to find the best fit between resources and resource requests. On resource profiles, you can include accomplishments in the remaining categories (honors, awards, and tests) for informational purposes only.

Competencies

Competencies encompass skills, abilities, knowledge, or behavior, such as experience with office equipment, knowledge of special manufacturing processes, or a background in financial planning. Unlike accomplishments, competencies are measured or evaluated using a rating model that you define.

For each resource competency, you can track several data elements on the resource profile, including the proficiency (degree of expertise) that the resource has attained, the resource's number of years of experience with the competency, and the level of interest the resource has in the competency. When requesting or searching for a resource, you can specify the competencies that are important, the resource's proficiency and years of experience with the competency, and whether the competency is desired or required. In addition, you can use competencies to capture resource specialties on the resource profile. A resource's specialties indicate that person's areas of expertise.

You must define competency types, rating models, and competencies to support the Resource Matching feature if you implement PeopleSoft Resource Management without PeopleSoft HRMS.

Note. Effective dating logic is not utilized when you manage competencies in PeopleSoft Resource Management without PeopleSoft Competency Management. In this case, historical competency data is not maintained.

Rating Models

You define the set of alphabetic or numeric codes for ranking an employee's degree of expertise and interest in a competency. Define a single rating model for the entire organization or build multiple models for different projects or departments.

Rating model descriptions are sorted alphabetically in the system. You can assign a number prefix to the description to determine the sort order, such as *1-Beginner*, *2-Intermediate*, and *3-Advanced*.

Note. The Resource Matching feature uses the Interest rating model (*INT*) values to calculate the Competency Interest factor fit score. You must use the Interest rating model to specify the interest rating. However, an administrator can modify the Interest rating model values as required.

The Competency Tree

PeopleSoft Resource Management requires that you maintain a tree with the name *COMPETENCY*. The Competency tree is a pictorial representation of the Competency table (*COMPETENCY_TBL*) and Competency Type table (*RS_TYPE_TBL*). The tree organizes competencies into hierarchies based on competency types. You can use the Competency tree that is delivered with PeopleSoft Resource Management, or you can build a Competency tree with PeopleSoft Tree Manager in the same way that you build any other tree. Competency types are created as nodes on the tree. Competencies are the detailed values that users can select from the tree.

The Competency tree that comes with the PeopleSoft system has multiple nodes. Each node represents a competency type and the detail values, or competencies, are dynamically identified. Each time that you create a new competency, it automatically appears on the tree—as long as you associate the competency with a competency type that exists on the tree.

You don't need to order competency codes in a particular sequence to use the Competency tree. For example, you don't need to set up management-level competencies in one range (such as 100 to 199) and technical competencies in another range (such as 200 to 299).

See Also

PeopleTools PeopleBook: PeopleSoft Tree Manager

Work Definition Tables

Work definition tables store the rules for basic company-wide functions. PeopleSoft Resource Management uses the definitions for:

- The frequency of pay cycles that defines standard hours for each resource.
- Job codes designating each type of job that employees hold.
- Holiday schedules.

Frequencies

You define frequency IDs along with a frequency type (such as monthly, weekly, bimonthly, daily, and hourly), and frequency annualization factor (the number of frequency periods that occur in a year). PeopleSoft Resource Management uses the Frequency Annualization Factor field value when calculating Availability factor fit scores.

Employee Data Tables

PeopleSoft Resource Management can use employee data that is maintained in a PeopleSoft HRMS system. When you integrate with PeopleSoft HRMS, Resource Management can access employee files, which serve as the foundation for all resource information used in the application. You must create and maintain basic employee and job data in Resource Management if PeopleSoft HRMS is not the employee data source.

The employee data tables consist of:

- Employee personal data.
- Employee job information.
- Visa and work permit information.
- Citizenship and passport information.

Important! If you can maintain non-employee data in either PeopleSoft HRMS or PeopleSoft Resource Management, any new employee ID (EMPLID) for a non-employee that is created in PeopleSoft Resource Management must be maintained in Resource Management, and any new employee ID for a non-employee that is created in PeopleSoft HRMS must be maintained in HRMS.

PeopleSoft Resource Management functions rely on accurate employee and job data. Consequently, you must establish a method to maintain up-to-date employee data and ensure that all relevant changes to employee information are reflected in the FSCM database.

See Also

[Chapter 13, “Establishing Resources,” page 125](#)

Establishing Application Setup Tables for Accomplishments

To establish application setup tables for accomplishments, use these components:

- Majors Table (RS_CM_MAJOR_TBL)

- Degrees Table (RS_CM_DEGREE_TBL)
- Honors/Awards Table (RS_CM_AWARD_TBL)
- Languages Table (RS_CM_LANG_TBL)
- Licenses/Certifications Table (RS_CM_LIC_CERT_TBL)
- Memberships Table (RS_CM_MEMBR_TBL)
- Schools Table (RS_CM_SCHOOL_TBL)
- Tests Table (RS_CM_TEST_TBL)

This section discusses how to complete setup tables for these accomplishments:

- Honors and awards.
- Memberships.
- Languages.
- Licenses and certifications.
- Tests.
- Degrees.
- Majors.
- Schools.

Note. You are not required to complete all of these setup tables. However, to track a particular accomplishment type, you must complete the setup table for that accomplishment type.

Pages Used to Establish Application Setup Tables for Accomplishments

Page Name	Object Name	Navigation	Usage
Honor/Award	RS_CM_AWARD_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Honors/Awards, Honor/Award	Establish the code and definition of honors or awards.
Membership	RS_CM_MEMBR_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Memberships, Membership	Establish the code and definition of memberships to be used when matching resources to assignments.
Language	RS_CM_LANG_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Languages, Language	Establish the code and definition of languages to be used when matching resources to assignments.

Page Name	Object Name	Navigation	Usage
License/Certificate	RS_CM_LIC_CERT_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Licenses / Certifications, License / Certificate	Establish the code and definition of licenses or certifications to be used when matching resources to assignments.
Test	RS_CM_TEST_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Tests, Test	Establish the code and definition of test results.
Degree	RS_CM_DEGREE_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Degrees, Degree	Establish the code and definition of degrees to be used when matching resources to assignments.
Major	RS_CM_MAJOR_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Majors, Major	Establish the code and definition of majors to be used when matching resources to assignments.
School	RS_CM_SCHOOL_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Schools, School	Establish the code and definition of schools to be used when matching resources to assignments.

Setting Up Resource Accomplishment Tables

Define each accomplishment table as necessary for the organization by completing these steps:

1. Access the setup table page.
2. Enter a new or existing code for the accomplishment.
3. Enter or update the detailed description of the code.
4. Save the record and click Add to create the next code and definition.

Establishing Application Setup Tables for Competencies

To establish application setup tables for competencies, use the Competency Table component (RS_CM_COMPTNCY_TBL), Review Ratings Table component (RS_CM_REVW_RAT_TBL), and Competency Type Table component (RS_CM_TYPE_TABLE). If you have a large number of competencies, use the Competency component interface (RS_CM_COMPTNCY_TBL) to load data into the tables for this component.

This section discusses how to set up resource competency tables.

Pages Used to Establish Application Setup Tables for Competencies

Page Name	Object Name	Navigation	Usage
Competency Type	RS_CM_TYPE_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Competency Types, Competency Type	Create competency types or broad categories of competencies relevant to particular positions or projects. Note. You must define competency types to build and maintain the Competency tree.
Rating Model	RS_CM_REVW_RAT_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Rating Models, Rating Model	Define a set of alphanumeric codes for ranking an employee's degree of expertise or experience in a competency.
Competency	RS_CM_COMPTNCY_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Competencies, Competency	Define skills, abilities, knowledge, or behaviors pertinent to jobs in the organization.

Setting Up Resource Competency Tables

Define each competency table by completing these steps:

1. Access the setup table page.
2. Enter a new code.
3. Enter the detailed description of the code.
4. Save the record and click Add to create the next code and definition.

Organizing Competencies Using the Competency Tree

This section discusses how to organize competencies using the Competency tree.

Page Used to Organize Competencies Using the Competency Tree

Page Name	Object Name	Navigation	Usage
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager, Tree Manager	View and update the Competency tree.

Using the Competency Tree to Organize Competencies

Create the Competency tree using PeopleSoft Tree Manager. You must specify the tree name as *COMPETENCY* and use the structure ID named *COMPETENCY*.

Organize competencies under competency types, such as *ADMIN*, *EXPER*, *MGMT*, and *TECH*. You can also maintain competency types within related types and define the Competency tree to be as simple or complex as you need.

To view the competencies in a particular type, use the dynamic detail feature of PeopleSoft trees in the Tree Manager component (PSTREEMGR) or Tree Viewer component (PSTREEVIEWER) in PeopleSoft Tree Manager. Square bracket [] nodes on trees represent the dynamic details.

To view a list of the competencies maintained under a competency type, select a square bracket node under a type and click Edit Data. The Competencies table detail appears. You can change a competency as necessary. Changes that you make from this page update the Competencies table.

To view the short and long descriptions of a competency type, select a type and click Edit Data. The Competency Types page appears.

See *PeopleTools PeopleBook: PeopleSoft Tree Manager*.

Establishing Application Setup Tables for Work Definitions

To establish application setup tables for work definitions, use these components:

- Frequency Table (RS_CM_FREQNCY)
- Holiday Schedule Table (RS_CM_HOLIDAY_CMPT)
- Job Code Table (RS_CM_JOBCODE_TBL)

This section discusses how to set up work definition tables.

Pages Used to Establish Application Setup Tables for Work Definitions

Page Name	Object Name	Navigation	Usage
Frequency Setup	RS_CM_FREQNCY_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Frequencies, Frequency Setup	Define a frequency ID, its frequency type (such as monthly, weekly, bimonthly, daily, and hourly), and its annualization factor (how many frequency periods occur in one year).
Setup Jobcode Table	RS_CM_JOBCODE_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Jobcodes, Setup Jobcode Table	Establish a code for each job that a resource holds in the organization. Note. Job codes can be alphanumeric.
Holiday Schedule	RS_CM_HOLIDAY_TBL	Set Up Financials/Supply Chain, Product Related, Resource Management, Competencies / Accomplishments, Holidays, Holiday Schedule	Identify the holidays observed by the organization.

Setting Up Work Definition Tables

Define each work definition table by completing these steps:

1. Access the setup table page.
2. Enter a new or existing code for the work definition.
3. Enter or update the description and other required fields for the code.
4. Save the record and click Add to create the next code and definition.

Creating Employee Data Files

To create employee data files, use the Personal Data Table component (RS_CM_PERSONAL). If you have a large number of employees, use the Personal Data component interface (RS_CM_PERSONAL) to load data into the table for this component.

This section discusses how to set up employee data tables.

Pages Used to Create Employee Data Files

Page Name	Object Name	Navigation	Usage
Update Employee Data - Personal Data	RS_CM_PERSONL_DATA	Resource Management, Establish Resources, Update Employee Data, Personal Data	Specify name, address, telephone, and status information for an employee ID.
Update Employee Data - Employee Job	RS_CM_EMPL_JOB	Select the Employee Job tab in any page in the Personal Data Table component.	Specify employee status and other basic job information such as department, location, and supervisor.
Update Employee Data - Visa/Work Permit	RS_CM_VISA_PRMT	Select the Visa/Work Permit tab in any page in the Personal Data Table component.	Specify visa and work permit information.
Update Employee Data - Citizenship/Passport	RS_CM_CITI_PASS	Select the Citizenship/Passport tab in any page in the Personal Data Table component.	Specify citizenship and passport information.

Setting Up Employee Data Tables

Define employee data tables by completing these steps:

1. Access the setup table page.
2. Enter a new or existing employee ID.
3. Enter or update the required information on each page.
4. Save the record and click Add to create the next employee ID and definition.

Employee Personal Data

Access the Update Employee Data - Personal Data page.

Personal Data	Employee Job	Visa / Work Permit	Citizenship / Passport
Update Employee Data			
Employee ID: RS00000026			
Employee Information			
Last Name: Chin		First Name: Robert	
Telephone: 925/555-3456			
*Personnel Status: Non-Employee		Person Type:	
Home Address			
Country: USA United States			
Address 1: 45 1st St.			
Address 2: Apt 1A			
Address 3:			
City: Pleasanton			
County:		Postal: 94588	
State: CA California			

Update Employee Data - Personal Data page

Employee Information and Home Address

Enter the name, address, and telephone information for an employee ID.

The user's name appears on all pages in the Update Employee Data component after you save, exit, and reenter the component. The user's telephone number appears on the Update Employee Data - Employee Job page after you save and exit and then access the component again.

Personnel Status

Select *Employee* or *Non-Employee*.

Person Type

Select a value to further classify a non-employee. This field appears only for records with the personnel status *Non-Employee*, and is used for information only in PeopleSoft Resource Management.

Available values are based on the translate values in the Person Type field (PER_TYPE) properties.

Note. Personal data records with the personnel status *Non-Employee* appear on the Employee Data page even if you do not allow non-employees to be established as resources.

Employee Job Information

Access the Update Employee Data - Employee Job page.

Personal Data
Employee Job
Visa / Work Permit
Citizenship / Passport

Update Employee Data

Robert Chin EmplID: RS00000026

Job Details
Find | View All First 1 of 1 Last

*Effective Date: 10/19/2003 Sequence: 0 Date Entered: 10/19/2003
*Employee Status: Active Action: Hire Employee Type: Salaried

*Business Unit: US003 US003 CALIFORNIA OPERATIONS
*Department: 41000 Engineering
Location Code: US003 USA - California
Supervisor ID: RS00000003 Falkner,Armand
Job Code: HXHE03 Associate Consultant
Employee Classification:
Standard Hours: 40.00
Standard Work Period: W Weekly
Holiday Schedule: USA USA Holidays

Update Employee Data - Employee Job page

Effective Date

Displays the system-assigned effective date. The system assigns the system date when new job information is entered.

Sequence

Displays the system-assigned sequence number. The system assigns the next available sequence number for the effective date. This is a record key that is used for system processing.

Employee Status

Enter the employee's status. Available values are based on the translate values in the Employee Status field (EMPL_STATUS) properties.

Note. Resources must have an employee status value of *Active* to be eligible for staffing in PeopleSoft Resource Management. If a resource has any employee status other than active, you can view—but not change—the resource's eligibility.

Action

Enter the action that is taken for the employee. In PeopleSoft Resource Management, this field is used for information only. Available values are based on the translate values in the Employee Action field (ACTION) properties.

Employee Type

Enter the type of employee. In PeopleSoft Resource Management, this field is used for information only. Available values are based on the translate values in the Employee Type field (EMPL_TYPE) properties.

Business Unit	Enter the human resources business unit for the employee or non-employee. This is a required field. Available values are based on the Business Unit field (BUSINESS_UNIT) in the HR Business Unit record (BUS_UNIT_TBL_HR).
Department	Enter the employee's department. This is a required field. Available values are based on the Department field (DEPTID) in the Departments record (DEPT_TBL).
Location Code	Enter the employee's work location. In PeopleSoft Resource Management, this field is used for information only. Available values are based on the Location field (LOCATION) on the Location record (LOCATION_TBL).
Supervisor ID	Enter the employee's supervisor or manager. Available values are based on the Employee ID field (EMPLID) on the Personal Data record (PERSONAL_DATA). You must enter a supervisor for all resources before you can use the following features: • Resource groups that are based on supervisor ID. • Assignment approval workflow. • Assignment status change notification workflow. • Assignment schedule change notification workflow. • Email notifications with comments regarding an assignment from a resource to the resource manager. You must enter a value in this field if PeopleSoft Program Management is installed.
Job Code	Enter the employee's job code. You can use this field to determine a resource's bill rate. Available values are based on the Job Code field (JOBCODE) in the Job Code record (JOBCODE_TBL). You must enter a value in this field if PeopleSoft Program Management is installed.
Employee Classification	Enter the employee's work classification. In PeopleSoft Resource Management, this field is used for information only. Available values are based on the translate values in the Employee Classification field (EMPL_CLASS) properties.
Standard Hours	Enter the employee's standard work hours. This value is used by the Resource Matching algorithm and in various PeopleSoft Resource Management interactive reports to calculate and report availability. You must enter a value in this field if PeopleSoft Program Management is installed.
Standard Work Period	Enter the employee's standard work period. This value is used by the Resource Matching algorithm and in various PeopleSoft Resource Management analyses to calculate and report availability. Available values are based on the Standard Work Period field (STD_HRS_FREQUENCY) in the Frequency record (FREQUENCY_TBL).

You must enter a value in this field if PeopleSoft Program Management is installed.

Holiday Schedule

Enter the employee's holiday schedule. Available values are based on the Holiday Schedule field (HOLIDAY_SCHEDULE) in the Holiday table (RS_HOLIDAY_TBL).

Note. You must refresh the Eligible Resource Cache table (RS_ELGBL_WRKR) when routine changes are made to a resource's job-related information. Additionally, you must update the Resource Organizational Unit Cache table (RS_WORKER_ORG) when a resource's organization unit value changes, such as the resource's department.

See [Chapter 16, "Enabling Resource Matching and Cache Processes," Refreshing Cache Tables and Purging Data, page 184.](#)

Visa Permit Information

Access the Update Employee Data - Visa/Work Permit page.

Personal Data Employee Job **Visa / Work Permit** Citizenship / Passport

Update Employee Data

Robert Chin EmpID: RS00000026

Customize Find First 1 of 1 Last							
	*Country		Visa/Permit Number	*Status	Type	*Type of Duration	Expiration Date
1	USA	United States	US34967	Applied		Months	12/31/2005

Update Employee Data - Visa/Work Permit page

Enter the applicable information for each field.

Citizenship and Passport Information

Access the Update Employee Data - Citizenship/Passport page.

Personal Data Employee Job Visa / Work Permit **Citizenship / Passport**

Update Employee Data

Robert Chin EmpID: RS00000026

Customize Find First 1 of 1 Last					
	*Country		*Passport Number	Issue Date	Expiration Date
1	USA	United States	US34967	03/25/2003	12/31/2005

Update Employee Data - Citizenship/Passport page

Enter the applicable citizenship and passport information for each field.

CHAPTER 10

Understanding EIPs

PeopleSoft Enterprise Integration Points (EIPs) allow PeopleSoft applications to work smoothly with third-party systems or software and with other PeopleSoft applications. EIPs provide integration details for PeopleSoft applications, including the technologies that are used, technology details, application messaging information, and the relationship of different EIPs. The EIP connects the two systems or applications, enabling one-way or two-way data transfer to accomplish a specific business purpose.

This chapter discusses:

- PeopleSoft integration technologies.
- Application messages that integrate PeopleSoft Resource Management with PeopleSoft Human Resources Management (PeopleSoft HRMS), version 8 or higher.
- Business interlinks.

See Also

PeopleSoft Enterprise Components

PeopleTools PeopleBook: PeopleSoft Application Designer

PeopleTools PeopleBook: PeopleSoft Component Interfaces

PeopleTools PeopleBook: PeopleSoft Integration Broker

PeopleSoft Integration Technologies

EIPs use a variety of PeopleSoft integration tools to integrate data across an enterprise. The *PeopleSoft Enterprise Components 8.8 PeopleBook* is a good resource for EIPs, including information about development tools and techniques.

This section discusses:

- Application messages
- Component interfaces
- Business interlinks

Application Messages

Application messaging is a middleware technology that facilitates synchronous and asynchronous messaging among internal systems and trading partners while managing message structure, message format, and transport disparities. Using a publish and subscribe architecture, an application, the publisher of changes in the data, sends dynamic data. Another application, the subscriber to the changes in data, receives the data. Application messaging provides integration that is near real time.

PeopleSoft Resource Management uses application messages to integrate with PeopleSoft HRMS. In the Financials and Supply Chain Management (FSCM) database there is a mirror image of the HRMS tables that are needed for the system, and the application messages are used by PeopleSoft Resource Management to keep these tables data synchronized. When data changes in HRMS, a message is sent to PeopleSoft Resource Management to load the appropriate data. The two types of application messages are:

- Incremental synchronization messages.

These messages kick off when incremental changes are made to the system, such as when a user adds new rows of data or changes existing data.

- Full synchronization messages.

These messages kick off during implementation to synchronize data between databases. This process deletes the data in PeopleSoft Resource Management tables and loads the appropriate data from PeopleSoft HRMS.

Important! Use the HRMS database as the only source database for application setup tables for accomplishments, competencies, and work definitions if you store employee data in PeopleSoft HRMS, and non-employee data in HRMS and PeopleSoft Resource Management. Otherwise you must keep the setup tables synchronized in both databases. Full synchronization messages overwrite accomplishment, competency, and work definition information that is stored in Resource Management.

Although application messaging is described as the tool for publishing data from a source database to a target database, you can also use it to publish and subscribe to a data change within the same database. PeopleSoft Resource Management also uses application messages to trigger the calculation of fit scores by the Resource Match engine. This ensures that each resource's fit score for each open resource request is calculated as soon as a relevant change occurs. The application messages that are used by the Resource Match engine are discussed earlier in this PeopleBook.

See Also

Chapter 3, "Understanding Resource Matching," Resource Match Engine Automatic and Batch Processes, page 19

Component Interfaces

A PeopleSoft component interface is an object-oriented, request/reply, component architecture that enables a PeopleSoft or third-party application to synchronously invoke PeopleSoft business logic that implements a business process or function. Every organization depends on real-world business objects, such as service orders in PeopleSoft Resource Management or invoices in PeopleSoft Receivables, to conduct its business.

A component interface is a PeopleTools object that is created in PeopleSoft Application Designer. Components have keys that enable navigation to a specific instance of a business object. The keys contain essential information that describes the object, which is made up of the fields in the component. A component also includes an organization's business rules that are associated with the type of business object that the component represents.

PeopleSoft Resource Management uses component interfaces to encapsulate the business logic around different business objects. For example, a component interface is built over the Service Order component so other parts of the application can use PeopleCode to update or create service orders while executing the appropriate business logic around these actions.

Component interfaces can be used to integrate with external applications. The component interfaces that are used in PeopleSoft Resource Management are discussed earlier in this PeopleBook.

See [Chapter 7, “Understanding Access-Related Features of PeopleSoft Resource Management,” page 65.](#)

Business Interlinks

A business interlink enables you to perform component-based, real-time integration from PeopleSoft to third-party systems by creating synchronous transactions that allow PeopleSoft applications to pass and receive data from the third-party system in real time. Business interlinks provide a consistent framework for invoking third-party applications across a wide variety of technologies.

The business interlink framework provides for querying data, updating data, adding data, deleting data, and performing specific transactions against objects in an external system. It can process a single transaction in real time, or it can process a batch of data by loading multiple rows of input into an input buffer and then invoking the corresponding method.

Primarily, PeopleSoft Resource Management utilizes this technology to integrate with Lotus Notes and Microsoft Exchange and Outlook third-party applications. With these application interfaces, you can synchronize Notes or Outlook calendars with Resource Management resource schedules.

See [Chapter 14, “Enabling Resource Schedules,” Synchronizing with Third-Party Desktop Calendars, page 148.](#)

Application Message Subscriptions that Integrate with PeopleSoft HRMS

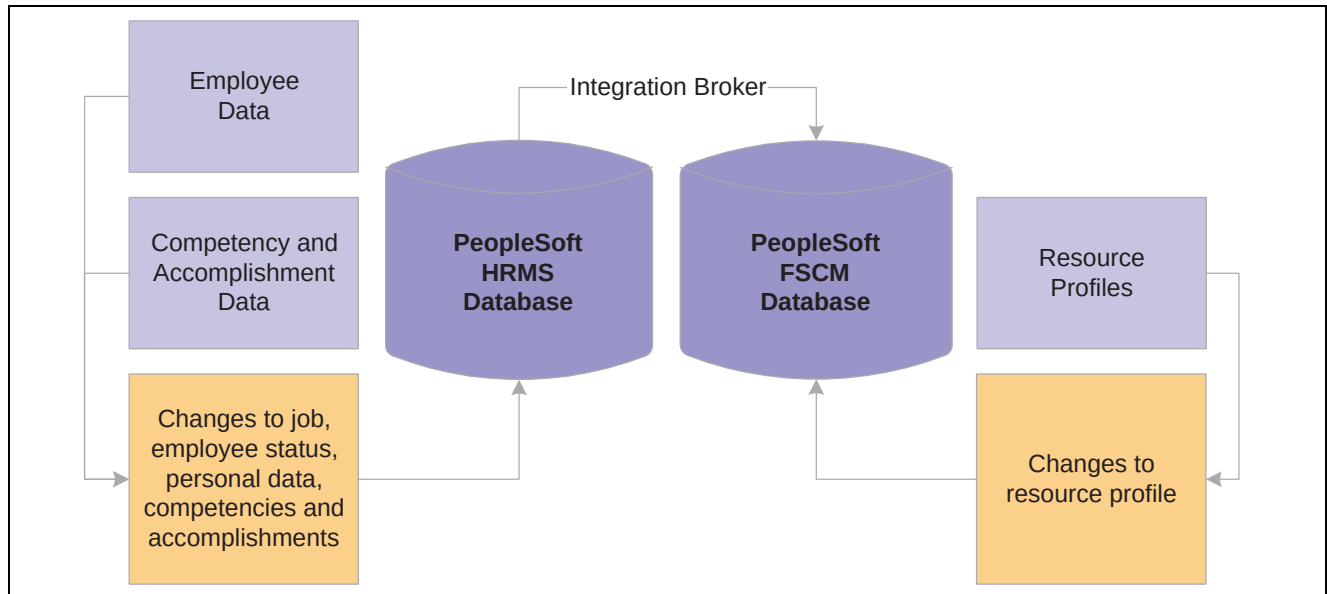
When you use PeopleSoft HRMS as the employee source database, HRMS uses application messages to send selected data to PeopleSoft Resource Management data tables, which are used to populate resource profiles. PeopleSoft Resource Management depends on the accuracy and timeliness of the information that is stored in the resource profiles. Because HRMS data is subject to continuous change, application messages provide the vehicle to keep the data current across the enterprise.

This section discusses:

- Shared data between PeopleSoft HRMS and PeopleSoft Resource Management.
- Incremental synchronization messages.
- Full table synchronization messages.

Shared Data Between PeopleSoft HRMS and PeopleSoft Resource Management

For the integration between PeopleSoft HRMS and PeopleSoft Resource Management, HRMS is the publisher of changes to data, and PeopleSoft Resource Management is the subscriber. This diagram illustrates the data-sharing process:



Sharing data between PeopleSoft HRMS and PeopleSoft Resource Management

To use PeopleSoft application messages, you must activate the Publication and Subscription services on the PeopleSoft Resource Management and PeopleSoft HRMS application servers.

If you integrate PeopleSoft Resource Management with HRMS, you must also activate the data synchronization application messages.

If you use PeopleSoft Resource Management without an integrated HRMS, the data synchronization application messages should not be activated.

Incremental Synchronization Messages

PeopleSoft Resource Management utilizes application messages to integrate PeopleSoft Resource Management tables with HRMS application tables. The messages are delivered with a default status of inactive. You must activate each message before attempting to publish messages or subscribe to messages between databases.

The direction of the publish and subscribe rule for each message may be bidirectional or unidirectional. The publish and subscribe rule may also be incremental or full table synchronization for each message.

Bidirectional, Incremental Messages—General Data Synchronization

When you use PeopleSoft HRMS with PeopleSoft Resource Management, you install two databases, HRMS and PeopleSoft Resource Management, and synchronize fundamental, general data records across the two databases. If you update the records in both databases and then make a change in PeopleSoft Resource Management, it gets published back to HRMS, and vice versa. This type of data synchronization is called bidirectional incremental messaging.

The following table lists the bidirectional, incremental synchronization messages to activate in the PeopleSoft HRMS and FSCM databases, and their corresponding message channel. You must activate and execute the messages in this table.

Note. We recommend that you do not implement the messages as bidirectional. If you set up the incremental messages as bidirectional, you may have data validation issues if you update the same record in each database at the same time. It is better to set up one database as the master so that all updates can occur in one place. The messages can then be set up as unidirectional and published to the subscribing database:

Message	Message Channel
DEPT_SYNC	ENTERPRISE_SETUP
LOCATION_SYNC	ENTERPRISE_SETUP

Unidirectional, Incremental Messages - PeopleSoft Resource Management-Specific Synchronization

The following table contains the incremental synchronization messages that update the PeopleSoft Resource Management application every time a user changes PeopleSoft HRMS data that is relevant to PeopleSoft Resource Management. These messages are published from HRMS to PeopleSoft Resource Management, which means that HRMS is always the source of data. Do not modify data in the FSCM database that is transmitted through these messages from PeopleSoft HRMS.

Once you activate these messages in PeopleSoft HRMS and PeopleSoft Resource Management, every subsequent change to HRMS data in any of the records that are associated with these messages triggers the publication and subscription of the new, modified, or deleted data. The result is that PeopleSoft Resource Management reflects the change within a few seconds.

This table lists the unidirectional incremental synchronization messages that you must activate in the PeopleSoft HRMS and FSCM databases, and their corresponding message channel:

Message	Message Channel
BUS_UNIT_HR_SYNC	HR_SETUP
CLUSTER_ACCOMP_SYNC	PERSON_SETUP
CLUSTER_COMP_SYNC	PERSON_SETUP
CM_TYPE_SYNC	PERSON_SETUP
COMPETENCY_SYNC1	PERSON_SETUP
COMPETENCY_SYNC2	COMPETENCY

Message	Message Channel
COMPETENCY_SYNC3	COMPETENCY
FREQUENCY_SYNC	PERSON_SETUP
HOLIDAY_DATE_SYNC	PERSON_SETUP
JOB_CODE_SYNC	PERSON_SETUP
JOB_FAMILY_SYNC	PERSON_SETUP
PERSON_ACCOMP_SYNC	PERSON_DATA
PERSON_COMPETENCY_SYNC	PERSON_DATA
PERSON_BASIC_SYNC	PERSON_DATA
PERSON_VISA_CITIZEN_SYNC	PERSON_DATA
RATING_MODEL_SYNC	RATING_MODEL
ROLE_ACCOMP_SYNC	PERSON_SETUP
ROLE_CLUSTER_SYNC	PERSON_SETUP
ROLE_COMP_SYNC	PERSON_SETUP
ROLE_SYNC	PERSON_SETUP
SCHOOL_SYNC	PERSON_SETUP
WORKFORCE_SYNC	PERSON_DATA

Full Table Synchronization Messages

Full synchronization is a much more data-destructive activity than incremental synchronization. Incremental synchronization messages modify, delete, or add only the data that changed as a result of an individual transaction. Full synchronization messages first delete all of the data that is in the target record in PeopleSoft Resource Management and then load a copy of the source record from PeopleSoft HRMS.

Note. There is an exception to the above statement. If you select the installation option to maintain non-employees (employee IDs with a status of *N*) in PeopleSoft HRMS and FSCM databases, the full synchronization process does not update non-employee data for employee IDs that originate in PeopleSoft Resource Management. In this case the process only updates employee and non-employee data that originates in HRMS.

An understanding of how full synchronization messages work is especially important if the list of departments or locations in the FSCM database is different from the one that is in the PeopleSoft HRMS database. Synchronizing departments by using a FULLSYNC message from PeopleSoft HRMS to PeopleSoft Resource Management overwrites all of the PeopleSoft Resource Management departments with the HRMS departments. Such an action would damage the FSCM database and require that the Departments table (DEPT_TBL) be restored from a backup that you made prior to the full synchronization.

Warning! We recommend that you only use full synchronization messages during implementation. If there is existing data in the FSCM database records and you use full synchronization messages, you will overwrite PeopleSoft Resource Management data that is associated with the message. We also recommend that you only implement full synchronization messages as unidirectional with one database as a publisher and another as a subscriber.

For example, users can add or change values in the Departments table and Location table (LOCATION_TBL) from a page in the FSCM database as well as the PeopleSoft HRMS database, but full synchronization messages copy data from HRMS to PeopleSoft Resource Management only. Therefore, any changes that a user makes directly in PeopleSoft Resource Management are eliminated when a full synchronization message is published from HRMS and subscribed to by PeopleSoft Resource Management.

Full table synchronization messages are delivered with a status of inactive. The publishing rules must be activated. Information that is to be shared by the PeopleSoft Resource Management and HRMS databases is updated properly when the appropriate messages are activated.

Warning! PeopleSoft recommends that you do not activate full synchronization messages for any record that receives input from more than one database. Carefully consider the impact of activating any of these messages. If you activate a message that is appended with FULL_SYNC, FULLSYNC, or FULLSYNCn, you overwrite all of the data in the FSCM database tables that are associated with the message, other than non-employee data that originates in PeopleSoft Resource Management.

Unidirectional, Full Synchronization Messages

This table lists the unidirectional full synchronization messages that you must activate in the PeopleSoft HRMS and FSCM databases and their corresponding message channels. When activated and executed, these messages overwrite all of the data that is associated with them in the FSCM database with the data in the HRMS database. Exceptions are preceded by an asterisk (*), which indicates that if you maintain non-employees in PeopleSoft Resource Management, the HRMS data does not overwrite the PeopleSoft Resource Management data for non-employees that originates in PeopleSoft Resource Management:

Message	Message Channel
BUS_UNIT_HR_FULLSYNC	HR_SETUP
CLUSTER_ACCOMP_FULLSYNC	PERSON_SETUP
CLUSTER_COMP_FULLSYNC	PERSON_SETUP
CM_TYPE_FULLSYNC	PERSON_SETUP
COMPETENCY_FULLSYNC1	PERSON_SETUP
COMPETENCY_FULLSYNC2	COMPETENCY
COMPETENCY_FULLSYNC3	COMPETENCY
FREQUENCY_FULLSYNC	PERSON_SETUP
HOLIDAY_DATE_FULLSYNC	PERSON_SETUP
JOB_CODE_FULLSYNC	PERSON_SETUP
JOB_FAMILY_FULLSYNC	PERSON_SETUP
* PERSON_ACCOMP_FULLSYNC	PERSON_DATA
* PERSON_BASIC_FULLSYNC	PERSON_DATA
* PERSON_COMPETENCY_FULLSYNC	PERSON_DATA
* PERSON_VISA_CITIZEN_FULLSYNC1	PERSON_DATA
RATING_MODEL_FULLSYNC	RATING_MODEL
ROLE_ACCOMP_FULLSYNC	PERSON_SETUP
ROLE_CLUSTER_FULLSYNC	PERSON_SETUP
ROLE_COMP_FULLSYNC	PERSON_SETUP

Message	Message Channel
ROLE_FULLSYNC	PERSON_SETUP
SCHOOL_FULLSYNC	PERSON_SETUP
* WORKFORCE_FULLSYNC	PERSON_DATA

A Caution Regarding Bidirectional, Full Synchronization Enterprise Messages

You must also activate and execute the messages that are in the following table, but we recommend that you do not implement the messages as bidirectional. The full synchronization messages that you implement in PeopleSoft Resource Management should be unidirectional because you only set up one database as a publisher and the other as a subscriber. If you set up full synchronization messages as bidirectional, you may overwrite unique values that are entered in each database and should not be synchronized:

Message	Message Channel
DEPT_FULLSYNC	ENTERPRISE_SETUP
LOCATION_FULLSYNC	ENTERPRISE_SETUP

Business Interlinks

The PeopleSoft Business Interlink framework provides a gateway for PeopleSoft applications to the services of any external system. This framework enables any PeopleSoft component (such as a page, an Application Engine program, and so on) to integrate with any external system in near real-time and batch modes.

This table lists the business interlink/XML transactions that are created by PeopleSoft Resource Management:

PeopleSoft Resource Management Application	Business Interlink Object	Purpose	Transaction
Integration with Microsoft Exchange/Outlook	RS_SCHED_XCALFIND	Finds external calendar entries.	Sends a request to find an external calendar entry.
Integration with Microsoft Exchange/Outlook	RS_SCHED_XCALREAD	Reads external calendar entries.	Sends a request to read an external calendar entry.
Integration with Microsoft Exchange/Outlook	RS_SCHED_XCALWRITE	Writes external calendar entries.	Sends a request to write an external calendar entry.

PeopleSoft Resource Management Application	Business Interlink Object	Purpose	Transaction
Integration with Microsoft Exchange/Outlook	RS_SCHED_XCALDELETE	Deletes external calendar entries.	Sends a request to delete an external calendar.
Integration with Lotus Notes	RS_SCHED_NCALFIND	Finds external calendar entries.	Sends a request to find an external calendar entry.
Integration with Lotus Notes	RS_SCHED_NCALREAD	Reads external calendar entries.	Sends a request to read an external calendar entry.
Integration with Lotus Notes	RS_SCHED_NCALWRITE	Writes external calendar entries.	Sends a request to write an external calendar entry.
Integration with Lotus Notes	RS_SCHED_NCALDELETE	Deletes external calendar entries.	Sends a request to delete an external calendar entry.

CHAPTER 11

Integrating PeopleSoft Resource Management with Other Applications

This chapter discusses integration with:

- PeopleSoft Program Management.
- The Services Forecasting feature.
- PeopleSoft Project Costing
- PeopleSoft Proposal Management
- PeopleSoft Services Procurement.
- Third-party desktop calendar applications.

Understanding Integration with PeopleSoft Program Management

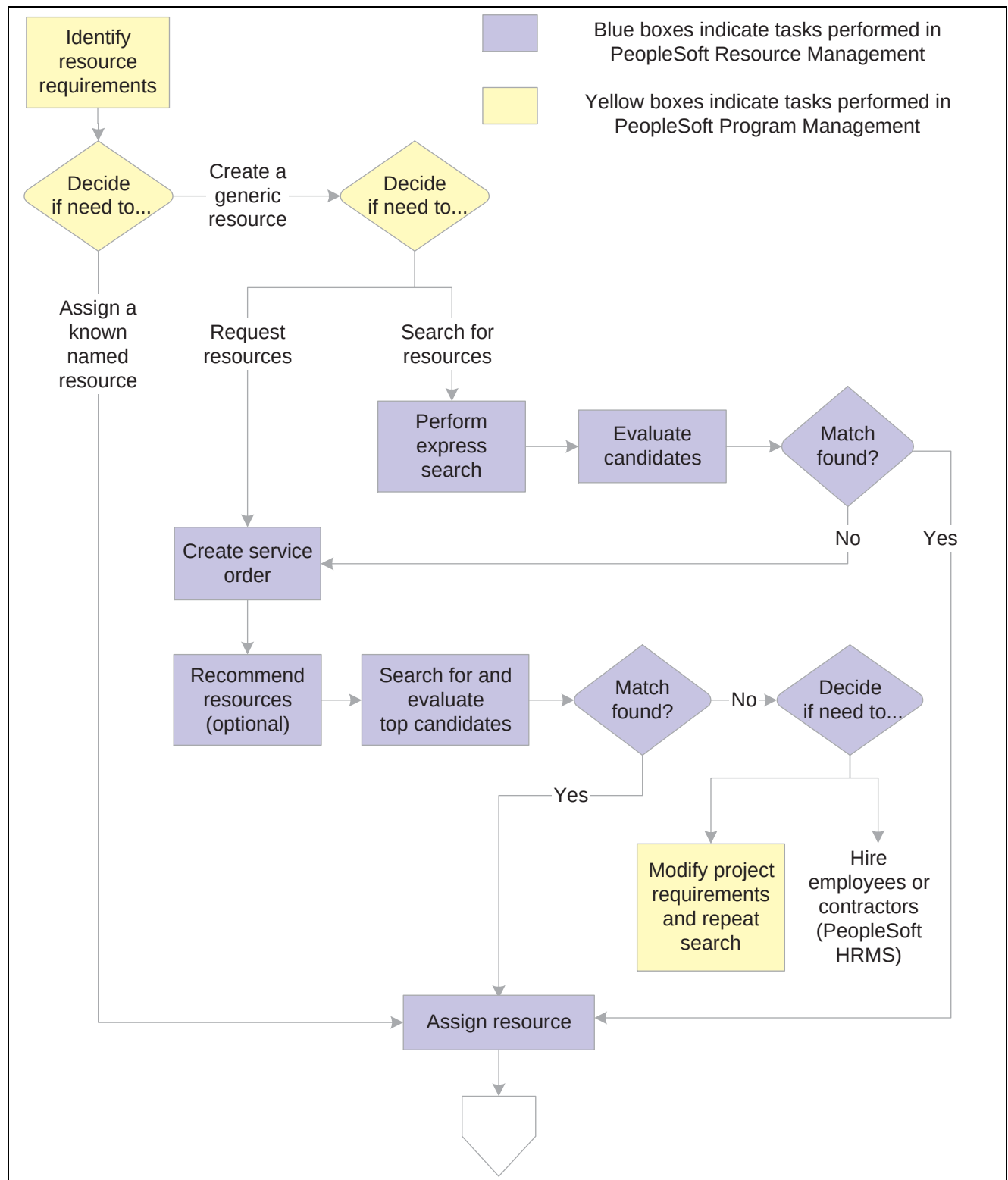
This section discusses integration with PeopleSoft Program Management.

Integration with PeopleSoft Program Management

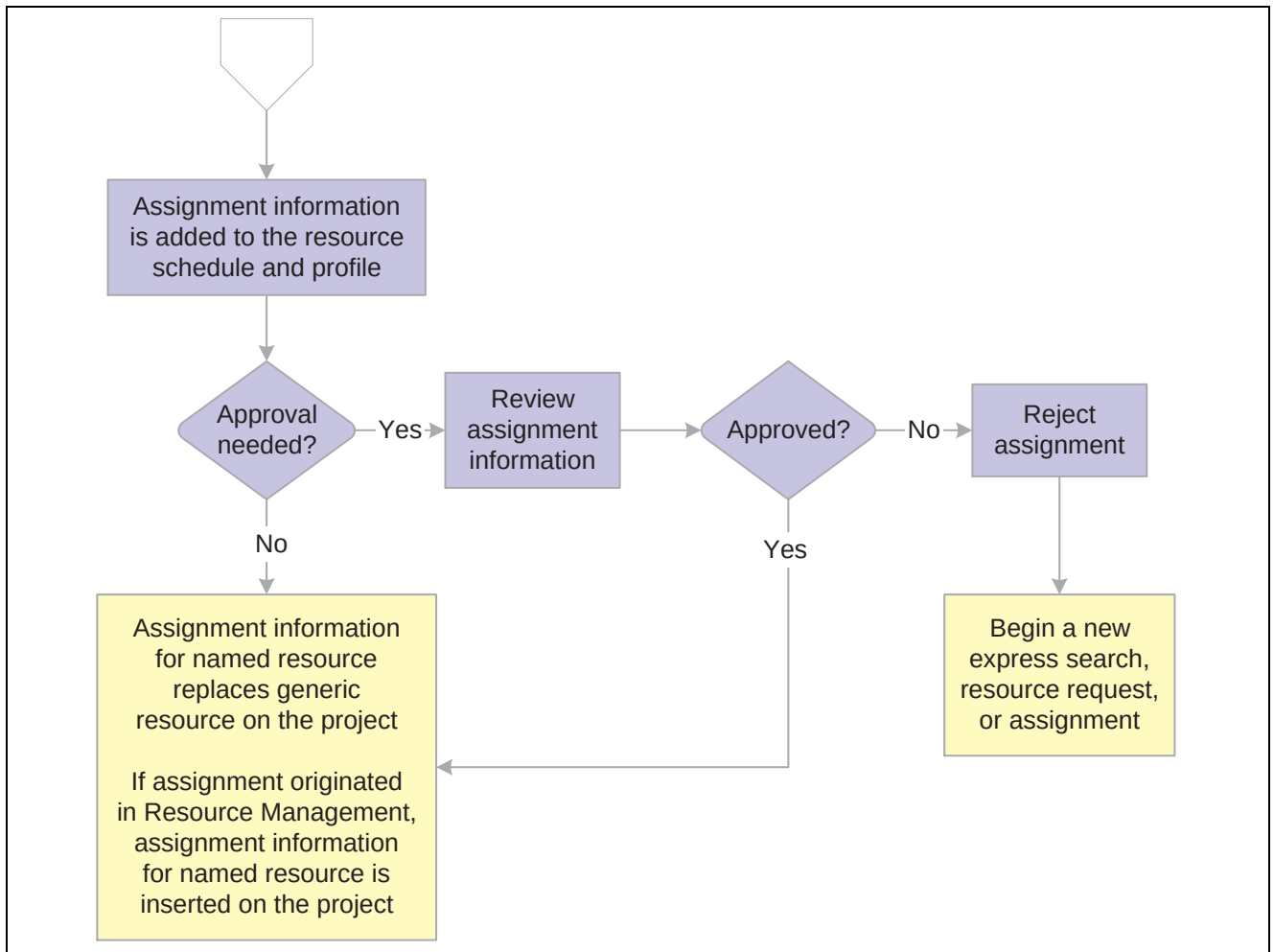
Integrating with PeopleSoft Program Management enables you to perform the following tasks from Program Management:

- Use the PeopleSoft Resource Management Express Search feature to find labor resources to replace generic resource placeholders on projects.
- Create and update service orders to fill generic resource placeholders.
- Directly assign resources to the project.
- Cancel resource requests.
- Cancel assignments.
- View resource schedules.
- Chart the schedules of the resources on a project.

This diagram illustrates the process of assigning a resource to a project:



Assigning a resource to a project (1 of 2)



Assigning a resource to a project (2 of 2)

Create Service Order

You can create service orders to assign named resources to projects on the Manage Generic Resource page in PeopleSoft Program Management. Generic resources are labor resources who do not have an employee ID associated with them; they serve as role-oriented placeholder descriptions for resources during the project planning phase. Each generic resource can generate a resource request line that is associated with the service order. Many of the service order or resource request fields, such as business unit, project, resource request dates, primary project role, and quantity requested, are populated from the generic resource.

Changes to the PeopleSoft Program Management generic resource are reflected on the PeopleSoft Resource Management *resource request* as follows:

- If the generic resource dates change, the new dates are reflected on the resource request.
- If the generic resource primary project role changes, the new project role is reflected on the resource request.
- If a generic resource is removed and the associated resource request is open, the resource request is automatically canceled.

You can also cancel resource requests for the project's generic resources on the Manage Generic Resource page.

Assign Resource

To assign a person who is established as a resource in PeopleSoft Resource Management, you can:

- Create a generic resource and use the Express Search feature to find resources and create assignments to replace the generic resource placeholder with a named resource.
- Select a resource that is managed in PeopleSoft Resource Management and create a direct assignment from the Project Resource Plan component (PGM_RESOURCE_LIST) in PeopleSoft Program Management.
- Create a resource request for a generic resource placeholder and use the Staffing Workbench to find a suitable named resource.
- Create a direct assignment in PeopleSoft Resource Management and associate it with the project.

Resource assignments are created in a status of *Reserve* for projects that are in a *Pending* processing status. Assignments are created in a status of *Assign* for projects that are in an *Active* processing status.

You cannot assign a resource in PeopleSoft Resource Management to more than one assignment for the same project if the assignment dates overlap. Resources can more than one assignment for a project if the assignment dates do not conflict.

These changes are synchronized between the PeopleSoft Program Management and PeopleSoft Resource Management:

- If a resource's scheduled time on a project changes in PeopleSoft Program Management, the new dates are reflected on the assignment in PeopleSoft Resource Management.
- If the assignment schedule changes in PeopleSoft Resource Management, the resource's new dates are reflected on the project in PeopleSoft Program Management.
- If a resource assignment is canceled in PeopleSoft Program Management after the project start date, the assignment is automatically completed.

Express Search

You can access the Express Search page in PeopleSoft Resource Management on the Resources page in PeopleSoft Program Management. On the Express Search page you can search for qualified candidates in Resource Management and create assignments to replace generic resources with named resources. The Express Search feature is accessible only for generic resource placeholders.

Chart Resource Schedules

You can review a chart of the schedules for resources who are assigned to a project from the Resources page in PeopleSoft Program Management.

Understanding Integration with the Services Forecasting Feature

This section lists prerequisites and discusses integration with the Services Forecasting feature that is part of PeopleSoft Program Management.

Note. This section is optional. If you are not using the Services Forecasting feature, you do not need to complete the tasks that are discussed in this section.

Prerequisites

This section lists prerequisites to integrating PeopleSoft Resource Management with the Services Forecasting feature:

- Set up forecast capture business units in PeopleSoft Program Management.
- Map nonassignment task categories to time reporting codes.

See Also

PeopleSoft Services Forecasting 8.8 PeopleBook, “Setting Up the Services Forecasting Feature”

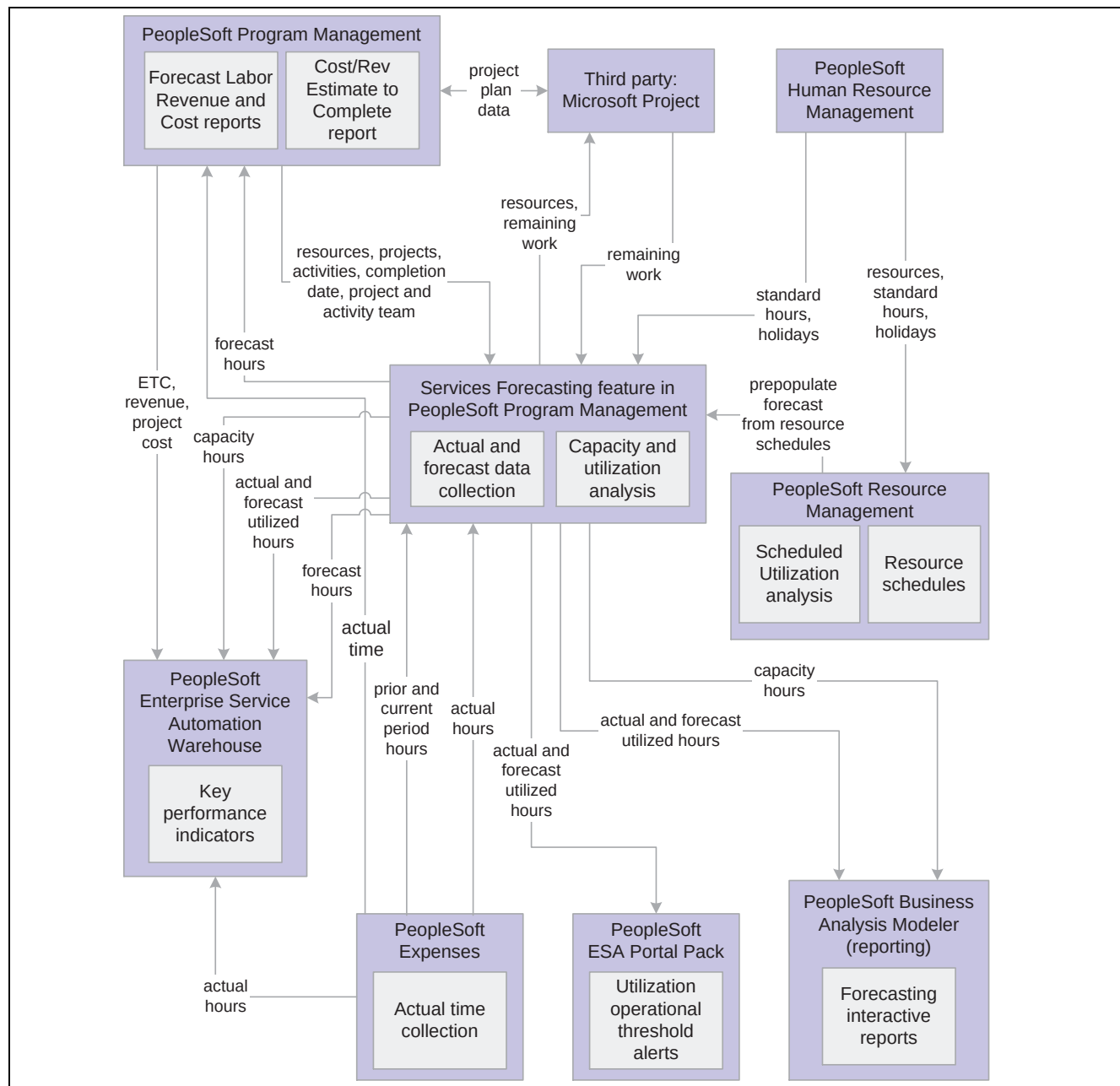
Chapter 14, “Enabling Resource Schedules,” Defining Task Categories and Mapping to TRCs, page 144

Integration with the Services Forecasting Feature

The information that the Services Forecasting feature collects and analyzes enables you to make decisions about recruiting, project profitability, productivity, new business, and company finances. You can anticipate utilization for one or a group of employees, compare forecasted utilization to actual utilization or actual capacity, and anticipate costs and revenue for a project.

PeopleSoft Resource Management resource schedules can be used—along with the previous forecast—to automatically prepopulate resource forecast horizons. You can prepopulate forecasts at the beginning of each forecast iteration for all, one, or selected GL business units. The prepopulation process loads schedules for assignments that have a status of *Pending Approval*, *Assigned*, or *Reserved*, regardless of the task category. Appointments on resource schedules are loaded to the associated time reporting code.

This diagram illustrates the data integration between the Services Forecasting feature, PeopleSoft Resource Management, and other PeopleSoft and third-party applications.



Services Forecasting feature integrations

Understanding Integration with PeopleSoft Project Costing

Integrating with PeopleSoft Project Costing enables you to assign resources in PeopleSoft Resource Management to a project team that is in PeopleSoft Project Costing.

Understanding Integration with PeopleSoft Proposal Management

Integrating with PeopleSoft Proposal Management enables you to create or update service orders from the Time Estimate page in Proposal Management. This feature is available only if you do not install PeopleSoft Program Management. The integration between proposals and service orders is through PeopleSoft Program Management if you use that product.

Understanding Integration with PeopleSoft Services Procurement

This section lists prerequisites and discusses integration with PeopleSoft Services Procurement.

Note. This section is optional. If you are not implementing PeopleSoft Services Procurement, you do not need to complete the tasks that are discussed in this section.

Prerequisites

This section lists prerequisites to integrating PeopleSoft Resource Management with PeopleSoft Services Procurement:

- Enable PeopleSoft Services Procurement integration on the Installation Options - Resource Management page.
- Specify the default field values for employee records that are created for service providers.
- Define the PeopleSoft Resource Management user who—on behalf of him or another user—initiates a service requisition in PeopleSoft Services Procurement as a valid requester in PeopleSoft Services Procurement.
- Define the PeopleSoft Resource Management user, such as the project manager, who requests service requisitions as a valid requester in PeopleSoft Services Procurement.
- Define service requisition defaults in PeopleSoft Services Procurement, such as project role, service type, and business unit.

If you allow non-employee data to be maintained only in the PeopleSoft Human Resources Management (PeopleSoft HRMS) database, then before you can select a PeopleSoft Services Procurement service provider for an assignment in PeopleSoft Resource Management, you must:

1. Create the PeopleSoft Services Procurement service provider in the PeopleSoft HRMS employee database.
2. Establish the non-employee as a resource in PeopleSoft Resource Management.

See Also

Chapter 13, “Establishing Resources,” Establishing and Maintaining Employees and Non-Employees as Resources, page 126

PeopleSoft Services Procurement 8.8 PeopleBook, “Implementing Your PeopleSoft Services Procurement System,” Setting Up Users

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up PeopleSoft Resource Management Installation Options

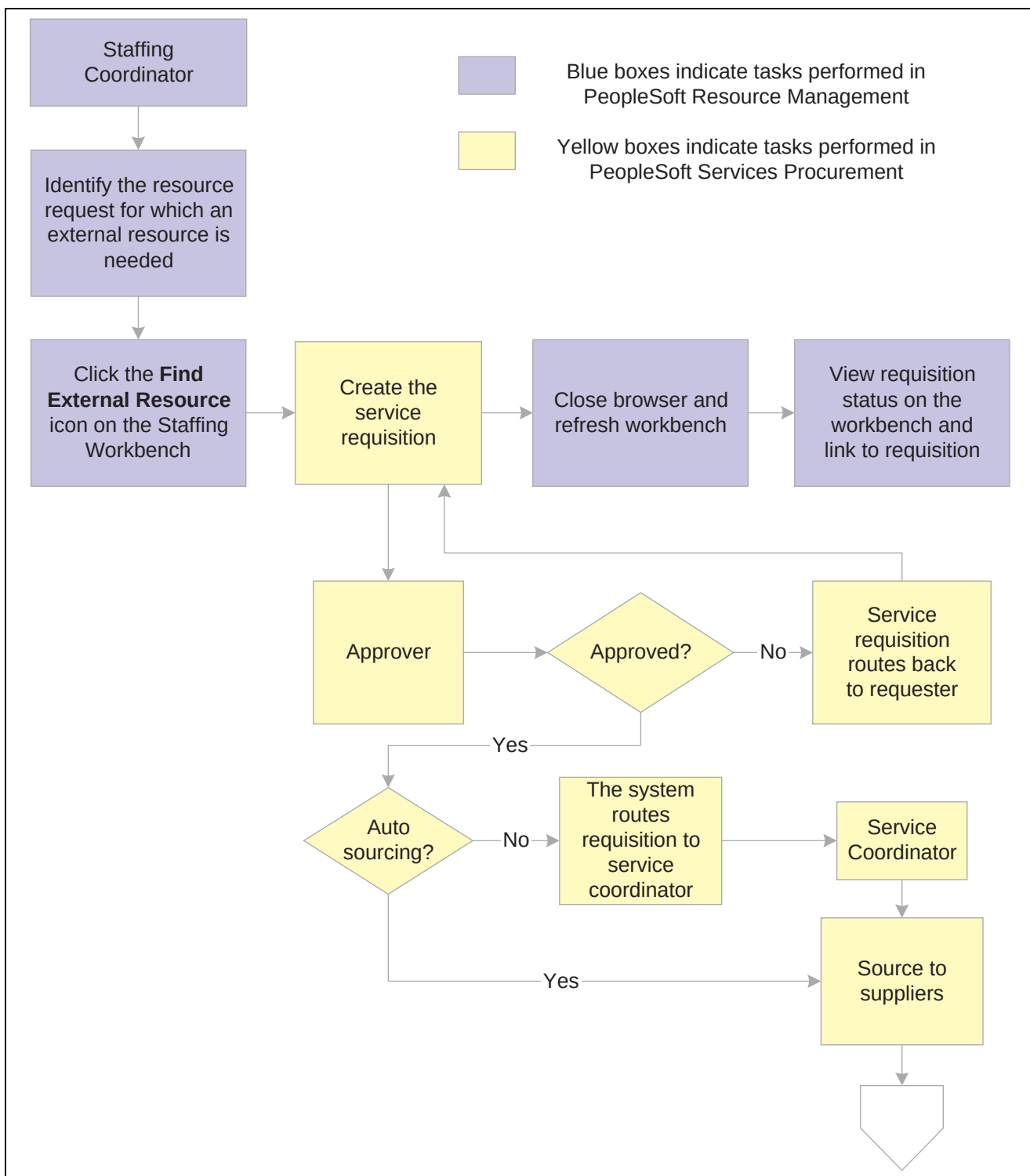
PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce

Integration with PeopleSoft Services Procurement

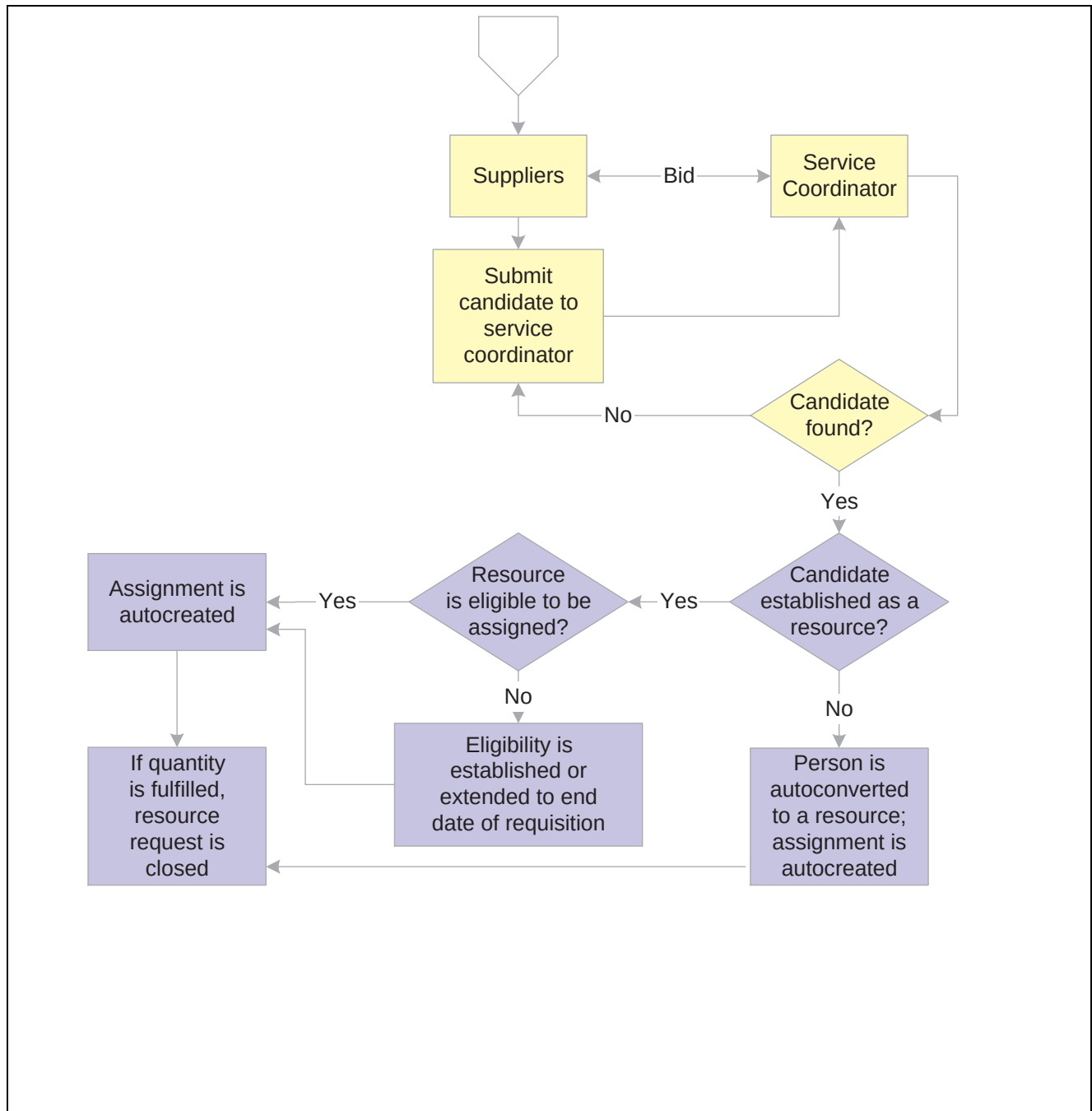
Integration with PeopleSoft Services Procurement enables you to:

- Initiate PeopleSoft Services Procurement service requisitions from within PeopleSoft Resource Management to fulfill resource requests, and navigate to requisitions to make updates.
- Create assignments from service requisitions to fulfill resource requests.
- View the fulfillment status of service requisitions.

This diagram illustrates the process of using a PeopleSoft Services Procurement service requisition to fulfill a resource request if you allow non-employee data to be maintained in PeopleSoft Resource Management:



Fulfilling a resource request using a PeopleSoft Services Procurement service requisition (1 of 2)



Fulfilling a resource request using a PeopleSoft Services Procurement service requisition (2 of 2)

Generate Service Requisition

The term *service provider* is used to describe non-employees in PeopleSoft Services Procurement who can be selected to fulfill service requisitions in PeopleSoft Services Procurement. From the Staffing Workbench - Fulfill Orders page in PeopleSoft Resource Management, you can create a PeopleSoft Services Procurement requisition and select a service provider to fulfill a resource request.

If you select a service provider to fulfill a service requisition in PeopleSoft Services Procurement and the requisition is used to fulfill a resource request, the system checks to see if the service provider is established as an eligible resource in PeopleSoft Resource Management. If the service provider is not an eligible resource and you allow non-employee data to be maintained in the FSCM database, one of these actions occurs:

- If you established the service provider as a resource previously, the system extends the existing resource's eligibility date to the end date of the requisition.
- If you did not establish the service provider as a resource, the system creates an employee record with a personnel status value of *N* (non-employee), establishes the employee as a resource, and specifies the resource's eligibility end date as the end date on the requisition.

When the system automatically creates an employee record for a service provider, the default business unit, department, location, supervisor, job, standard hours, standard work period, and holiday schedule field values appear on the Installation Options - Resource Management page.

After you establish the service provider as an eligible resource in PeopleSoft Resource Management, then the system creates an assignment for the resource automatically.

Users receive a message if they try to select a service provider for a resource request that is already fulfilled in PeopleSoft Resource Management.

Create Assignment from a Service Requisition

In PeopleSoft Services Procurement you can select a candidate to fulfill a service requisition. If the requisition was generated from a PeopleSoft Resource Management resource request, the service requisition information is used to create an assignment and establish the candidate as a resource. If the assignment fulfills the outstanding demand for the resource request, the request is closed.

View and Track Requisition Status

From the Staffing Workbench - Fulfill Orders page in PeopleSoft Resource Management, you can review the number of external requisitions initiated, filled, or canceled for each resource request. You can also access PeopleSoft Services Procurement to edit the requisition or review the approval and sourcing progress.

Understanding Integration with Third-Party Desktop Calendar Applications

This section lists prerequisites and discusses:

- Integration with third-party desktop calendar applications.
- A caution about nonassignment meetings and personal appointments.

Note. This section is optional. If you are not integrating with third-party desktop calendar applications, you do not need to read this section.

Prerequisites

Before integrating PeopleSoft Resource Management with a third-party desktop calendar application, configure your environment to support the Microsoft Outlook and Exchange or Lotus Notes and Domino client/server platform with your PeopleSoft platform. See the *PeopleSoft 8.8 Financials, ESA and Staffing Front Office Product-Specific Installation Instructions* document on the PeopleSoft Customer Connection website.

Integration with Third-Party Desktop Calendar Applications

PeopleSoft Resource Management can integrate with Lotus Domino and Notes or Microsoft Exchange and Outlook third-party calendar applications. This enables you to synchronize resource schedules in PeopleSoft Resource Management with common desktop calendars that the resources may already be using.

See [Chapter 14, “Enabling Resource Schedules,” Synchronizing with Third-Party Desktop Calendars, page 148.](#)

A Caution About Nonassignment Meetings and Personal Appointments

If you use the Resource Optimization feature, do not load or synchronize nonassignment meetings and personal appointments to resource schedules using Microsoft Outlook or Lotus Notes. Resource Optimization treats nonassignment meetings and personal appointments as days that are unavailable for resources to work on assignments, even if the appointments don't affect their availability on the resource schedules.

See [Chapter 17, “Enabling Resource Optimization,” Understanding Resource Optimization, page 193.](#)

CHAPTER 12

Establishing Customers

This chapter provides an overview of customer profiles and discusses how to work with customer and contact profiles.

See Also

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Maintaining General Customer Information”

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Maintaining Contacts”

Understanding Customer Profiles

PeopleSoft Resource Management requires customer information for reference on service orders and assignments. If you use a PeopleSoft Financial Management Solutions, Enterprise Service Automation, or Supply Chain Management application that requires defined customer records, then the PeopleSoft customer database is already available for use by Resource Management. If you don’t already use the customer database, then you must populate the tables with customer data.

This section lists prerequisites and discusses:

- Customer profiles.
- Contact profiles.

Prerequisites

Before you can work with customer profiles, you must establish a customer database that contains a valid customer ID for each PeopleSoft Resource Management customer.

See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Maintaining General Customer Information”.

Customer Profiles

After establishing the PeopleSoft customer database, you can access customer information from various links throughout PeopleSoft Resource Management. When you access the customer tables from PeopleSoft Resource Management, you work with the PeopleSoft Resource Management view of the customer location and contact information via the Customer Information and Contact Profile pages. On the Customer Information page, you can add PeopleSoft Resource Management–specific data, such as housing information, travel information, dress code, and whether trainees are allowed at that location.

On the Customer Information page, you can view but not update basic customer location data. To update this data or add new customer records, access the customer information pages.

Contact Profiles

The information that appears on the Contact Profile page is also derived from the PeopleSoft customer database. On the Contact Profile page, you can review basic customer contact data, such as name, address, and telephone. To update this data or to add new contact records, use the Contact Information page.

Working with Customer and Contact Profiles

To work with customer profiles, use the Customer Information component (RS_CUST_INFO). If you have a large number of customers, use the Customer Information component interface (RS_CUST_INFO) to load data into the tables for this component.

This section discusses how to add information to customer profiles that is specific to PeopleSoft Resource Management.

Pages Used to Work with Customer and Contact Profiles

Page Name	Object Name	Navigation	Usage
Customer Information	RS_CUST_INFO1	• Set Up Financials/Supply Chain, Product Related, Resource Management, Maintain Customer Information, Customer Information • Resource Management, Request Resources, Create or Review Service Order, Order Summary Click Location Details on the service order's Order Summary page. • Click Change Location/Contact Information in the Resource Requests in this Order scroll area, and click Location Details on the Service Order - Location and Contact Details page. • Resource Management, Request Resources, Create Svc Order from Template, Order Summary Click Location Details on the Order Summary page. • Resource Management, Assign Resource, Assign Resource Click Location Details on the Assign Resource page.	View customer profiles, or add information that is specific to PeopleSoft Resource Management.
Contact Profile	RS_CONTACT_INFO1	• Click Contact Details on the service order's Order Summary page. • Click Contact Details on the Service Order - Location and Contact Details page. • Click Contact Details on the Assign Resource page.	View basic customer contact data, such as name, address, and telephone number.

Adding Information to Customer Profiles

Access the Customer Information page.

Customer Information			
SetID:	SHARE		
Engagement Location			
Customer ID:	JPN01	Description:	Main
Customer Name:	Super Sport Max Japan		
Name 2:			
Name 3:			
Address Seq:	1		
Country:	JPN	Japan	
Address 1:	Toei Mishuku Bldg 5F		
Address 2:	1-13-1 Mishuku		
Address 3:			
Address 4:			
City:	Setagayu-ku		
	Postal:	154-0005	
Prefecture:	13	Tokyo-To	
Housing Information:	Corporate apartment available.		
Travel Information:	Plant is 2 hour drive from airport.		
Dress Code:	B. Casual	☐ Trainees Allowed	

Customer Information page

Housing Information

Enter housing information that is specific to this customer location. For example, enter local hotel names or the maximum rate that the customer will pay.

Travel Information

Enter travel information that is specific to this customer location. For example, enter expenses that are not covered.

Dress Code

Enter the dress code that is observed at the project location. Values are *B. Casual* (business casual), *Casual*, and *Formal*.

Trainees Allowed

Enter if this location permits trainees. A trainee is usually a nonbillable resource who is observing, for evaluation purposes, the resource that is assigned to a project.

CHAPTER 13

Establishing Resources

This chapter provides an overview of resources and discusses how to:

- Establish and maintain employees and non-employees as resources.
- Establish PeopleSoft Services Procurement service providers as resources.
- Maintain resource eligibility and job information.

Understanding Resources

This section lists prerequisites and discusses resources in PeopleSoft Resource Management.

Prerequisites

This section lists prerequisites to establishing employees or non-employees as resources in PeopleSoft Resource Management:

- Determine if the organization's business processes allow non-employees to be managed as resources.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Setting Up PeopleSoft Resource Management Installation Options.

- Establish the employee source database.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Setting Up PeopleSoft Resource Management Installation Options.

- Define billing rates by employee or by job.

See *PeopleSoft Project Costing 8.8 PeopleBook*, "Pricing Project Costs," Understanding and Defining Rate Templates.

- (Optional) Establish the FTP file server to store resumes that are attached to resource profiles.

See Chapter 4, "Preparing to Implement PeopleSoft Resource Management," Understanding Storage of Resource Resume Attachments, page 46.

Resources in PeopleSoft Resource Management

The term *resource* describes the employees and non-employees who can be assigned to projects in PeopleSoft Resource Management. The employee source database contains information about employees and non-employees. PeopleSoft Resource Management captures additional information about resources. After you establish the employee source database, you must designate the employees and non-employees who fulfill the role resource roles in Resource Management.

When you establish an employee or non-employee as a resource, PeopleSoft Resource Management automatically populates the resource's schedule with holidays. The new resource is immediately eligible for assignments. At any time, the resource and resource manager can update the resource's profile and schedule, and the resource manager can change the resource's eligibility status. For an employee with multiple jobs in PeopleSoft Human Resources Management (PeopleSoft HRMS), the resource manager can select the job that pertains to the employee's role as resource in PeopleSoft Resource Management.

You can establish employees and non-employees as resources by using these methods:

- Manually establish an employee or non-employee as a resource by using the Create Resources page.
- Establish a batch of resources using the Create Resources Program page.
- Manually convert a PeopleSoft Services Procurement service provider to a resource by using the Convert Person ID to Resource page if you integrate with PeopleSoft Services Procurement and maintain non-employees in PeopleSoft Resource Management.
- Automatically convert a PeopleSoft Services Procurement service provider to a resource when the service provider is selected for a service requisition that is associated with a PeopleSoft Resource Management resource request if you integrate with Services Procurement and maintain non-employees in Resource Management.

Establishing and Maintaining Employees and Non-Employees as Resources

To establish and maintain employees and non-employees as resources, use the Create Resources Program component (RS_CW_AE) and Establish Employee as Resource component (RS_WRKR_CREATE). If you have a large number of employees to establish as resources, use the Establish Employee as Resource component interface (RS_WRKR_CREATE) to load data into the tables for this component.

This section discusses how to:

- Select employees or non-employees to establish as resources in batch.
- Run the batch create resources program.
- Establish an employee or non-employee as a resource.
- Select one job for a resource.

Note. This section is required. You must establish employees and non-employees as resources before you can maintain their profiles, manage their schedules, or place them on assignments in PeopleSoft Resource Management.

Pages Used to Establish and Maintain Employees and Non-Employees as Resources

Page Name	Object Name	Navigation	Usage
Create Resources Program	RS_CW	Resource Management, Establish Resources, Create Resources Program, Create Resources Program	Select the criteria to generate a list of employees or non-employees to establish as resources.
Create Resources Program (list)	RS_CW_2	Click Generate List on the Create Resources Program page.	View the list of employees or non-employees that you select to establish as resources and execute the Create Resources program.
Create Resources	RS_WRKR_CREATE	Resource Management, Establish Resources, Create Resources, Create Resources	Establish the selected employee or non-employee as a resource.
Establish Employee as Resource	RS_WRKR_CREAT_CHNG	Click Change Job on the Create Resources page.	If you allow multiple jobs in PeopleSoft HRMS, select one job to associate with the employee or non-employee resource in PeopleSoft Resource Management.

Selecting Employees or Non-Employees to Establish as Resources in Batch

Access the Create Resources Program page.

Use the Create Resources Program page to generate a list of employees and non-employees to establish as resources. You can select employees by job code, business unit, location, or department. You can also select individual employees and non-employees.

Non-employees do not appear for selection on this page if you cannot establish non-employees as resources.

Job Codes

Use this collapsible grid to select employees and non-employees by job code:

▼ Job Codes

[Customize](#) | [Find](#) | [View 100](#) |

First ◀ 1-10 of 393 ▶ Last

Select	Job Code	Description
☒	HXHE01	Senior VP
☒	HXHE02	Senior Consultant
☐	HXHE03	Associate Consultant
☐	HXTC1	Associate I
☐	HXTC2	Associate II
☐	HXTC3	Associate III
☐	HXTC4	Associate IV
☐	HXTC5	Associate V
☐	IXHE01	Senior VP
☐	KB0001	Sales Manager

and/or: ▼

Job Codes collapsible grid on the Create Resources Program page

Select

Select one or more job codes for PeopleSoft Resource Management to use to generate the list of employees and non-employees to establish as resources.

and/or

Select *and* to narrow the list. The system includes only employees and non-employees that meet these criteria and the criteria that is in the next grid.

Select *or* to include employees and non-employees that meet any of the criteria that is selected in the grids.

If you leave the field blank, the system includes employees and non-employees that meet any of the criteria that is selected in the grids.

Business Units

Use this collapsible grid to select employees and non-employees by business unit:

▼ **Business Units** [Customize](#) | [Find](#) | [View All](#) | [First](#) ◀ 17-26 of 26 ▶ [Last](#)

Select	Business Unit	Description
☐	GBR02	Sales and Marketing - UK
☐	GBR03	Administration - UK
☐	ITA01	Italian Business Unit
☒	JPN01	Japan Business Unit
☐	NLD01	Netherlands Business Unit
☐	US001	GBI BU for US001
☐	US003	GBI BU for US003
☐	US004	GBI BU for US004
☐	US005	GBI BU for US005
☐	US006	GBI BU for US006

and/or: ▼

Business Units collapsible grid on the Create Resources Program page

Select Select one or more business units for PeopleSoft Resource Management to use to generate the list of employees or non-employees to establish as resources.

Locations

Use this collapsible grid to select employees and non-employees by location:

▼ **Locations** [Customize](#) | [Find](#) | [View All](#) | [First](#) ◀ 49-58 of 98 ▶ [Last](#)

Select	Location Code	Description
☐	INDCW	India - Location (State KAR)
☐	ITL01	Italy - Napoli
☒	JPN01	Japan - Tokyo-To
☒	JPN02	JPN02 - Sapporo
☐	KUNY00	Corporate Headquarters
☐	LUX01	Luxembourg - Location 1
☐	MANITOBA	Manitoba
☐	MS-1	Med/Surg - 1 Floor East
☐	MS-2	Med/Surg - 1 Floor West
☐	NEWBRUNSW	New Brunswick

and/or: ▼

Locations collapsible grid on the Create Resources Program page

Select

Select one or more locations for PeopleSoft Resource Management to use to generate the list of employees or non-employees to establish as resources.

Departments

Use this collapsible grid to select employees and non-employees by department:

▼ Departments Customize Find View 100  First ◀ 21-30 of 155 ▶ Last		
Select	Department	Description
☐	25000	Marketing
☐	27000	Customer Service
☐	31000	Quality Assurance
☐	41000	Engineering
☒	42000	Manufacturing Support
☐	43000	Research and Development
☐	4444	Office of the President
☐	4555	Operations
☐	50000	Purchasing
☐	51000	Stocking

and/or: ▼

Departments collapsible grid on the Create Resources Program page

Select

Select one or more departments for PeopleSoft Resource Management to use to generate the list of employees or non-employees to establish as resources.

Employees

Use this collapsible grid to select individual employees and non-employees to include in addition to the criteria that is specified in the Job Codes, Business Units, Locations, and Departments grids:

▼ Employees							
				Customize	Find	View 100	
Select	EmplID	Name	Job Code	Business Unit	Location Code	Department	Personnel Status
☐	IXHEEE128	Masterson, Carlos	KU051	US003	ICA1	22000	Employee
☒	KU0045	McCoy, Maria	KU051	US003	ICA1	41000	Employee
☐	IXHEEE212	Mercier, Patrice	KU120	US004	ICA1	22000	Non-Empl
☒	KU0114	Miller, Michelle				11000	Employee
☒	IXHEEE217	Miller, Oscar	KU077	US004	ICA1	22000	Non-Empl
☒	KU0046	Miller, William	KU001	US005	ICA1	41000	Employee
☐	KU0009	Monroe, Theresa	KU051	US001	ICA1	22000	Employee
☐	IXHEEE178	Ng, Frances	KU001	US005	ICA1	41000	Employee
☒	KUI016	O'Brien, Jacqueline	KU105	US001	ICA1	13000	Employee
☐	IXHEEE220	O'Connell, Damian	KU120	US004	ICA1	22000	Non-Empl

Employees collapsible grid on the Create Resources Program page

Select Select the employee ID for each employee or non-employee to establish as a resource in addition to those that meet the criteria that is specified by job code, location, or department.

Generate List Accesses the Create Resources Program page with a list of the selections.

Clear Clears the check boxes in all grids.

Running the Batch Create Resources Program

Access the Create Resources Program list page.

Create Resources Program

Press the "Establish Resources" button to establish the listed employees as resources.

▼ Resources To Be Established						
				Customize	Find	View All
EmplID	Name	Job Code	Business Unit	Location Code	Department	Personnel Status
KU0045	McCoy, Maria	KU051	US003	ICA1	41000	Employee
KU0114	Miller, Michelle				11000	Employee
IXHEEE217	Miller, Oscar	KU077	US004	ICA1	22000	Non-Empl
KU0046	Miller, William	KU001	US005	ICA1	41000	Employee
KUI016	O'Brien, Jacqueline	KU105	US001	ICA1	13000	Employee
11499	Ville, Margarita		US006		42000	Employee

Create Resources Program list page

Use this page to review the employees and non-employees to be established as resources and to execute the Create Resources Application Engine process (RS_CW).

Establish Resources Executes the Create Resources process to convert the list of employees or non-employees into assignable resources.

This process does not affect PeopleSoft HRMS employee records. It establishes a new row of data in the Worker table (RS_WORKER_TBL) and Worker Effective Date table (RS_WRKR_EFFDT) for each resource.

Cancel

Clears the list and return to the preceding page.

Conflicting Resources

If any of the resources that you establish have more than one job in PeopleSoft HRMS (more than one active row in the JOB table), they are listed here.

When you execute the process, the system selects the job with the lowest field value in the Employee Record Number field (EMPL_RCD) to enter into the PeopleSoft Resource Management Worker table and Worker Effective Date table. The lowest employee record number represents the job entry that is created first. Use the Establish Employee as Resource - Select Job page to select a different job to which the resource can be assigned in PeopleSoft Resource Management.

New resources are established as eligible for staffing in PeopleSoft Resource Management, which means that they are included in the Resource Match engine and can be placed on assignments. Use the Resource Eligibility Management page to change the resource's eligibility.

Important! After you execute the process to convert the list of employees into resources, run the Refresh Match Cache Application Engine process (RS_DF) to update the Match Cache table that is used for resource matching.

See Also

Chapter 16, "Enabling Resource Matching and Cache Processes," Administering Cache and Maintenance Processes, page 179

Establishing an Employee or Non-Employee as a Resource

Access the Create Resources page.

Create Resources

Randy Unger
EmplID: IXHEEE111

Please verify the information below for the employee you selected to be established as a resource in the Resource Management system. When you are finished, press the "Save" button below and the resource will be added.

Verify Resource Information

Job:	Project Scheduler	KU120
Location:	ICA1	ICA1
Department:	Information Services	11000

To establish the resource with a different Job, press the "Change Job" button.

Change Job

Create Resources page

Use this page to establish an individual employee or non-employee as a resource.

Non-employees do not appear for selection on the Establish Employee as Resource - Add an Employee as Resource search page if you cannot establish non-employees as resources.

Job, Location, and Department

Verify the information for this employee.

Information appears on this page only if all three values—job, location, and department—are entered for this resource in the employee source database.

Note. If the values that appear on this page are incorrect, go to the employee source database to make corrections.

Save

Establishes the employee as a resource with the values that appear on the page.

Change Job

If you integrate with PeopleSoft HRMS and use the multijob feature, select Change Job to access a page where you can select a different job for the resource.

Selecting One Job for a Resource

Access the Establish Employee as Resource page.

Establish Employee as Resource

Randy Unger
EmplID: IXHEEE111

Below is a list of the current active job records for this employee. Press the "Select" button corresponding to the job for which you would like the resource to be established.

Select Job			
Department	Location	Job	
Information Services	ICA1	Project Scheduler	Select
Sales Administration	ICA1	General Manager	Select

Establish Employee as Resource page

The list of active jobs for this employee appears on this page.

Select

Click Select next to the appropriate job to associate with this resource in PeopleSoft Resource Management.

Establishing PeopleSoft Services Procurement Service Providers as Resources

This section provides an overview of service providers and discusses how to:

- Set up service provider personal data and job detail tables.
- Map existing non-employee records to service provider person IDs.

Note. This section is optional. If you are not implementing PeopleSoft Services Procurement, you do not need to complete the tasks that are discussed in this section.

Understanding Service Providers

In PeopleSoft Services Procurement, each service provider has a unique person ID. This section discusses the methods that can be used to establish a service provider as an eligible, non-employee resource in PeopleSoft Resource Management.

Manual Creation of Service Providers as Resources

These are the steps to manually establish a service provider as a resource:

1. Associate the service provider person ID with an employee record in PeopleSoft Resource Management in one of two ways:

- If you allow non-employee resources to be maintained in the Financials and Supply Chain Management (FSCM) database, access the Convert Person ID to Resource page to create an employee record with the personnel status of non-employee from the existing person ID.
- If you require non-employees to be maintained in the Human Resource Management (HRMS) database, create the employee record in PeopleSoft HRMS, load the employee data into PeopleSoft Resource Management by using the application messaging synchronization process, and then access the Map Employee ID to Person ID page to associate the service provider with an employee record.

Now you can access the Create Resources page to establish the individual service provider as a resource, or access the Create Resources Program page to establish resources in batch.

2. Access the Maintain Eligibility page to manage the resource's eligibility.

By default, the resource is eligible to be placed on an assignment.

Automatic Creation of Service Providers as Resources

If you select a service provider to fulfill a service requisition in PeopleSoft Services Procurement and the requisition is associated with a resource request, the system checks to see if the service provider is established as an eligible resource in PeopleSoft Resource Management. If the service provider is not an eligible resource and you allow non-employee data to be maintained in the FSCM database, the system can automatically establish the service provider as a resource for you.

The system uses this logic to establish the service provider as a resource:

- If non-employees are maintained in PeopleSoft Resource Management and the person ID is not associated with an employee value (EMPLID) in PeopleSoft Resource Management, the system creates an employee value with the personnel status *Non-Employee*.

By default, the system creates the resource with the status eligible and the resource can be placed on an assignment. The system automatically changes the status to not eligible at the requisition end date. Other default values that appear in the employee record are specified on the Installation Options - Resource Management page.

- If the service provider is associated with an employee record that is established as a resource but the resource currently has a status of not eligible, the resource status changes to eligible.

A future-dated row is added to return the resource to an ineligible status on the requisition end date.

Note. You can allow the resource to remain eligible after the assignment end date by manually deleting the future-dated ineligibility row.

This automatic conversion process occurs before the service provider is placed on the assignment in PeopleSoft Resource Management. The automatic conversion occurs only if you allow non-employee resources to be maintained in the FSCM database.

Note. If you maintain non-employee data in both databases and you integrate PeopleSoft Resource Management with PeopleSoft Services Procurement, two employee records may exist for the same person. This can occur if a PeopleSoft Services Procurement person ID (PERSON_ID) and a PeopleSoft HRMS employee record exist for the same person, and the system automatically establishes the person ID as a non-employee resource in PeopleSoft Resource Management.

See Also

Chapter 11, “Integrating PeopleSoft Resource Management with Other Applications,” Understanding Integration with PeopleSoft Services Procurement, page 115

Pages Used to Establish PeopleSoft Services Procurement Service Providers as Resources

Page Name	Object Name	Navigation	Usage
Convert Person ID to Resource	RS_CONV_PERS_DATA	Resource Management, Establish Resources, Convert Person ID to Resource, Convert Person ID to Resource	Specify employee information and job details for the person ID.
Map Employee ID to Person ID	RS_MAP_EMP_TO_PER	Resource Management, Establish Resources, Map EmplID to Person ID, Map Employee ID to Person ID	Map a PeopleSoft Services Procurement person ID to an employee record in PeopleSoft Resource Management. Note. Use this page only if PeopleSoft HRMS is the employee source database.

Setting Up Service Provider Personal Data and Job Detail Tables

Access the Convert Person ID to Resource page.

Enter employee information and job details for the person ID.

The personnel status non-employee is not editable. The default values for business unit, department, location code, supervisor ID, job code, standard hours, standard work period, and holiday schedule are specified on the Resource Management Installation page.

See Also

Chapter 9, “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” Setting Up Employee Data Tables, page 93

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up PeopleSoft Resource Management Installation Options

Mapping Existing Non-Employee Records to Service Provider Person IDs

Access the Map Employee ID to Person ID page.

Use this page if PeopleSoft HRMS is the only source database for non-employees. When you enter the Map EmplID to Person ID component (RS_MAP_EMP_TO_PER), select Add a New Value on the search page to create a new association between an employee ID and a person ID. Select Find an Existing Value to view and edit an existing association.

Employee ID

In the search page, select the employee ID to map to a person ID or view an existing association. Available values are based on employee IDs that are created in the HRMS database with a personnel status of non-employee and are not already mapped to a person ID.

Add

Click to proceed to the Map Employee ID to Person ID page to select the corresponding person ID.

Person ID

Enter the person ID from PeopleSoft Services Procurement to associate with this employee ID in PeopleSoft Resource Management. Available values are based on person IDs that are not already mapped to an employee ID.

Maintaining Resource Eligibility and Job Information

This section discusses how to:

- Change resources' current eligibility.
- Add resources' future eligibility.
- Review resources' current job details.
- Select resources' current or future jobs.

Pages Used to Maintain Resource Eligibility and Job Information

Page Name	Object Name	Navigation	Usage
Maintain Eligibility	RS_WRKR_MGMT	Resource Management, Establish Resources, Maintain Eligibility, Maintain Eligibility	Review or change the resource's eligibility.
Resource Eligibility Management	RS_WRKR_MGMT_FUT	Click Change or Add Eligibility on the Maintain Eligibility page.	Change or add a future eligibility status and effective date for the resource.
Select Job	RS_WRKR_JOB_INFO	Resource Management, Establish Resources, Select Job, Select Job	View the current job that is associated with the resource.
Change Job	RS_WRKR_NEW_JOB	Click Change Job on the Select Job page.	If you allow multiple jobs in PeopleSoft HRMS, select one job to associate with the employee or non-employee resource in PeopleSoft Resource Management.

Changing Resources' Current Eligibility

Access the Maintain Eligibility page.

Maintain Eligibility

Randy Unger

This page is used to manage the eligibility of the resource within Resource Management. Once a resource is made ineligible, the resource will no longer be assignable within Resource Management. Also, if the employee is not active, you cannot assign the resource in Resource Management. Use the radio buttons below to modify the eligibility of the resource as needed, or push the "Change or Add Eligibility" button if you want to schedule a change in the resource's eligibility on a future date. Press the "save" button at the bottom of the page when you are finished

Resource Eligibility

Resource eligible to be staffed? ☒ Yes ☐ No

Employee Status: Active

Click here to change or add a future eligibility of a resource.

Change or Add Eligibility

Maintain Eligibility page

Resource eligible to be staffed

Enter *Yes* or *No* to indicate whether the resource is eligible for assignments and resource matching in PeopleSoft Resource Management.

You cannot select *Yes* if the value in the Employee Status field is not *Active*. If an employee or non-employee is not active, a message appears on the page stating that the resource cannot be made eligible to be staffed.

Employee Status

Displays the employee's or non-employee's human resources status in the employee source database.

Note. Changing a resource's eligibility does not change the employee status in the employee source database.

Change or Add Eligibility

Click to access the Resource Eligibility Management page to manage future eligibility.

Adding Resources' Future Eligibility

Access the Resource Eligibility Management page.

Resource Eligibility Management

Randy Unger

Check the box if the Resource is eligible to be staffed.

Future Resource Eligibility

*Effective Date	Resource eligible to be staffed?	Delete
06/01/2004 31	☐	Delete

Add Future Eligibility

Resource Eligibility Management page

Effective Date	Enter the date on which the eligibility change becomes effective.
Resource eligible to be staffed	Select if the resource is eligible for assignments as of the effective date. Clear if the resource is ineligible for assignments as of the effective date.
Add Future Eligibility	Adds additional eligibility lines.

Note. Changing a resource to ineligible at a future date does not prevent you from scheduling the resource before the effective date for an assignment that begins or continues after the effective date. However, on or after the date that resources become ineligible, you can no longer assign the resources, and they are not included in the Resource Match engine. You can continue to access and update the ineligible resource's profile, and you can access the ineligible resource's schedule and enter appointments.

Important! A resource's assignments are automatically canceled if an employee's status changes in PeopleSoft HRMS from active to any other status, and if you use HRMS as the employee source database.

Reviewing Resources' Current Job Details

Access the Select Job page.

Select Job

Randy Unger

This is the current job for which the resource will be assigned. Click the "Change Job" button to change the current job or to schedule a future job change.

Job Information Detail

Job	Department	Location
General Manager	Sales Administration	ICA1

Change Job

Select Job page

Use this page only if you use the Multiple Jobs feature in PeopleSoft HRMS.

In PeopleSoft HRMS, you can establish rules for multiple jobs so that you can assign an employee to multiple job categories. In PeopleSoft Resource Management, you can designate only one active job for each resource.

The active jobs for a resource appear on this page.

Change Job Click to select a different job to associate with the resource in PeopleSoft Resource Management.

Selecting Resources' Current or Future Jobs

Access the Change Job page.

Change Job

Randy Unger

Below is a list of all active jobs that exist for this employee. Please select a job and the date when this job should become effective.

Job Information Detail			
Job	Department	Location	New Job
Project Scheduler	Information Services	ICA1	☒
General Manager	Sales Administration	ICA1	☐

On what date will the new job be effective?

Effective Date: 

[Return to Job Information](#)

Change Job page

Use this page only if you establish rules for multiple jobs in PeopleSoft HRMS.

The list of active jobs for a resource appears on this page.

New Job Select a check box to designate the corresponding job to associate with the resource in PeopleSoft Resource Management.

Effective Date Enter the date on which the job change becomes effective.

CHAPTER 14

Enabling Resource Schedules

This chapter provides an overview of resource schedules and discusses how to:

- Define task categories and map to time reporting codes (TRCs).
- Define holidays on resource schedules.
- Synchronize with third-party desktop calendars.

Understanding Resource Schedules

PeopleSoft Resource Management provides a schedule to manage each resource's monthly, weekly, and daily commitments. The system creates a schedule for each employee or non-employee who you establish as a resource in PeopleSoft Resource Management. The resource, resource manager, or practice manager can modify the schedule, which is updated automatically with the resource's assignment tasks. Information that is stored on a resource's schedule is used to determine the resource's availability factor, which the system evaluates when it searches for resources to fulfill assignments.

This section discusses:

- Task categories.
- TRCs.
- Holidays.
- Third-party desktop calendar applications.

Task Categories

In PeopleSoft Resource Management, a task is the equivalent of a schedule entry, such as an appointment or assignment. Resource tasks are managed with a set of predefined task categories that are delivered with PeopleSoft Resource Management, and user-definable categories that are available for tasks that are specific to the organization. There are two main types of task categories: assignment task categories, such as billable external and nonbillable internal, and appointment task categories, such as meeting and holiday.

Every entry on a resource's schedule must be associated with a task category. Task categories are used to distinguish between different types of tasks on a resource's schedule, for both informational purposes and in the Resource Matching Availability factor fit score calculation. Each task category is assigned a flexibility percentage, which is used in Resource Matching to identify how easily a task in that category can be rescheduled. Tasks that are in a category with a high flexibility percentage are considered more likely to be rescheduled. Resources with high flexibility tasks on their schedules are considered to be more available than resources with low flexibility tasks.

Note. Tasks in PeopleSoft Resource Management are not the same as tasks that appear on a task pad or to-do list, such as those offered by Microsoft Outlook, Lotus Notes, and other calendar management tools.

The assignment process adds assignment tasks with a status of reserved, pending approval, and assigned to the schedule. For assignment task categories, the basic flexibility percentage that you assign applies to assignments with a status of pending approval or assigned. You can also indicate a reserved status flexibility for assignment task categories, which assigns a different—usually higher—flexibility for assignment tasks that are in that category with a status of reserved. For example, if the basic flexibility percentage for the task category of billable external is zero percent, the reserved flexibility percentage of the billable external task category can be set to 50 percent.

The following table identifies:

- Each delivered task category and description.
- The basic (default) flexibility percentage.
- The flexibility percentage for the task category with a status of reserved.
- Whether the task category is available for an assignment (Y) or an appointment (N).

Task Category	Description	Basic (Default) Flexibility	Reserved Status Flexibility	Assignment
BE	Billable External	0.00	0.50	Y
BI	Billable Internal	0.25	0.75	Y
CORPORATE	Corporate Event	0.00	0.00	N
EDUCATION	Education - College/Univ	0.25	0.25	N
HOLIDAY	Company Holiday	0.00	0.00	N
LEAVE	Planned Leave	0.00	0.00	N
MEETING	Meeting	0.50	0.50	N
NE	Nonbillable External	0.25	0.75	Y
NI	Nonbillable Internal	0.50	1.00	Y
PERSONAL TIME	Personal Time Off	0.50	0.50	N

Task Category	Description	Basic (Default) Flexibility	Reserved Status Flexibility	Assignment
TRAINING	Corporate Training	0.75	0.75	N
VACATION	Vacation	1.00	1.00	N

For each delivered task category, you can modify the default flexibility and reserved status flexibility percentages, and change the type value to *Y* (assignment) or *N* (appointment).

You can also create task categories for appointment types or assignment types. You can rename any task category that you create; however, you cannot rename the delivered task categories. Two task categories, *OTHER* and *OTHER2*, are delivered as examples.

TRCs

You must map task categories to TRCs for nonassignment time if you use the PeopleSoft Services Forecasting feature that is available with PeopleSoft Program Management. A TRC represents an incident of time and defines its type, units, currency, and other attributes. When the forecast collection tool in Services Forecasting extracts data from the PeopleSoft Resource Management resource schedules to load resource forecasts, the tool loads nonassignment hours based upon a task category's mapping to a TRC. The tool does not load nonassignment time into a resource forecast for which no mapping exists.

See Also

PeopleSoft Services Forecasting 8.8 PeopleBook, “Setting Up the Services Forecasting Feature”

Holidays

Holidays that are observed in the workplace impact availability, and holiday schedules can differ from country to country. In PeopleSoft Resource Management, you can recognize company holidays on resource schedules.

Like other tasks, holiday tasks must be associated with a task category. Using the Company Holiday task category enables you to manage flexibility during the holiday and supports reporting capabilities. For example, you can select whether to include holidays in utilization ratio calculations.

When you implement PeopleSoft Resource Management, all of the resource schedules are empty. The schedules reside in the Schedule Tasks record (RS_SCHED_TASK), which is delivered without data. When you start using PeopleSoft Resource Management, the Resource Match engine determines each eligible resource's availability to fulfill each open service order. The system calculates availability by analyzing the flexibility of each task on a resource's schedule and the portion of the resource's available work time that is assigned to tasks.

The holidays that each employee is entitled to observe reside in the Holiday Dates record (HOLIDAY_DATE), which is established during installation. During installation you initiate the Holiday Load Application Engine process (RS_HOLIDAY) to insert holidays into each resource's schedule. This process inserts into the resource's schedule all of the holidays that are associated with the holiday schedule that is specified on the resource's current data row on the Job record (JOB) in the employee source database. A task with a task category of *HOLIDAY* is inserted for every holiday.

Third-Party Desktop Calendar Applications

You can integrate PeopleSoft Resource Management with Microsoft Outlook and Exchange or Lotus Notes and Domino desktop calendar applications. If you established a client/server environment to support one of these calendar applications and you want to integrate it with schedules in PeopleSoft Resource Management, you must enable the synchronization options and run the synchronization process against the PeopleSoft Resource Management schedules. This is a bilateral synchronization process that you can schedule as a routine batch program or initiate as needed.

You enter appointments into a third-party calendar or a PeopleSoft Resource Management resource schedule by using task category types. To synchronize the calendar entries, map each PeopleSoft Resource Management appointment task category to one third-party task category. If you do not map a PeopleSoft Resource Management appointment task category to a third-party task category, and you do not define a default PeopleSoft Resource Management task category during synchronization, the individual calendar event is not synchronized. This technique allows a resource to store personal or other tasks on the third-party calendar that don't need to be considered when performing availability calculations.

Appointment tasks that you create in PeopleSoft Resource Management can be updated only in Resource Management. You cannot enter an appointment in Resource Management and modify it in a third-party calendar application.

The same is true for appointment tasks that you create in a third-party calendar application. If you create an appointment in a third-party calendar application and run the synchronization process, you cannot access the appointment details from the resource schedule in Resource Management. Appointments that originate in a third-party application appear as read-only in resource schedules.

You cannot create or modify assignment tasks in a third-party calendar application.

Defining Task Categories and Mapping to TRCs

To define task categories and map to TRCs, use the Task Type component (RS_TASK_TYPE).

This section discusses how to create or update task categories and map to TRCs.

Page Used to Define Task Categories and Map to TRCs

Page Name	Object Name	Navigation	Usage
Task Categories	RS_TASK_TYPE	Set Up Financials/Supply Chain, Product Related, Resource Management, Calendar, Setup Task Categories, Task Categories	Create or update task categories, and map task categories to TRCs.

Creating or Updating Task Categories and Mapping to TRCs

Access the Task Categories page.

Task Categories

***Task Category**
CORPORATE

Resource Schedule Categories

***Task Description**
Corporate Event ☐ Use for Assignment

Comments
Corporate Event

Flexibility
0.00

Flexibility is taken into account when calculating each resource's availability. Enter a decimal value between 0 and 1 which represents the flexibility or the possibility that a task in this Task Category can be moved or re-scheduled. A value of 1.00 indicates that a task of this category is completely (100%) flexible and can be re-scheduled. A value of 0.00 indicates the task is completely inflexible and is (in theory) not to be re-scheduled or changed.

Map Time Reporting Codes

For each Task Category, only one Time Reporting Code per setid can be mapped.

	*SetID	*Time Reporting Code		
1	SHARE	FHOL	+	-

Task Categories page

On this page, you can:

- View and modify the Comments, Flexibility, and Reserved Status Flexibility values for delivered task categories.
- Define new task categories.
- Rename and modify user-defined task categories or the delivered PeopleSoft *OTHER* and *OTHER2* task categories.
- Map task categories to TRCs (if you use the PeopleSoft Services Forecasting feature that is available with PeopleSoft Program Management).

Resource Schedule Categories

Task Description and Comments

Enter or modify information for task categories that you create, modify information for *OTHER* or *OTHER2* task categories, or view PeopleSoft task category information.

Use for Assignment

Select to make the task category available for assignments. Clear this check box to make the task category available for appointments.

Flexibility	Enter the percentage that represents flexibility of tasks in this category. For assignment type tasks, this applies to the <i>Assigned</i> or <i>Pending Approval</i> status. The higher the value, the more flexible the task. Tasks that are in a category with a high flexibility percentage are considered more likely to be rescheduled.
Reserved Status Flexibility	For assignment type tasks, enter the percentage that represents the flexibility of the task in this category with a status of <i>Reserved</i> . The higher the value, the more flexible the task. This field is available when you select the Use for Assignment check box.

Map TRCs

This group box appears if you use the Services Forecasting feature that is available with PeopleSoft Program Management.

SetID	Enter the setID for this task category. The system uses the setID according to the resource's general ledger business unit to determine which task-category-and-TRC map to follow. This field is required if you want to map the task category to a TRC for use in the Services Forecasting feature in PeopleSoft Program Management.
Time Reporting Code	Enter the TRC for this task category. For each category, enter only one TRC per setID. This field is required if you want to map the task category to a TRC for use in the Services Forecasting feature in PeopleSoft Program Management.

See Also

PeopleSoft Services Forecasting 8.8 PeopleBook, "Setting Up the Services Forecasting Feature," Setting Up TRCs and Mapping Task Categories

Defining Holidays on Resource Schedules

This section lists a prerequisite and discusses how to:

- Load holidays on all resource schedules.
- Load holidays on individual resource schedules.

Prerequisite

Before running the Holiday Load process, you must establish at least one holiday in the Holiday Dates record for every Holiday Schedule field (HOLIDAY_SCHEDULE) value that is assigned to eligible resources (employees and non-employees), and every resource must be assigned a holiday schedule on the Job record (JOB).

Pages Used to Define Holidays on Resource Schedules

Page Name	Object Name	Navigation	Usage
Load Holidays	RUN_RS_HOLIDAY	Set Up Financials/Supply Chain, Product Related, Resource Management, Calendar, Load Holidays, Load Holidays	Load or update holidays on all resource schedules.
Monthly Schedule	RS_SCHED_MONTH	- Resource Management, Maintain Schedules, Monthly Schedules, Monthly Schedule - Resource Management, Maintain Schedules, My Monthly Schedule, Monthly Schedule	Load holidays on individual resource schedules.

Loading Holidays on all Resource Schedules

Access the Load Holidays page.

The duration of each holiday that is added to resource schedules is specified in the appropriate holiday calendar. If the calendar does not specify the duration, the holiday hours are based on an option that you select on the Installation Options - Resource Management page.

Refreshing Holidays

If you integrate with PeopleSoft Human Resources Management (PeopleSoft HRMS), you must run the Holiday Load process at installation and when you add a new year to the holiday calendar. For other routine changes, application messages are used to monitor changes to the holiday schedule in the employee source database.

If you do not integrate with PeopleSoft HRMS, you must run the Holiday Load process when you:

- Install PeopleSoft Resource Management.
- Change, add or delete one or more holidays on the holiday calendar.
- Add a new year of holidays to the holiday calendar.

The Holiday Load process applies changes to a resource schedule if the resource's holiday calendar is affected.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up PeopleSoft Resource Management Installation Options

Updating Holidays on Individual Resource Schedules

Access the Monthly Schedule page.

Click Update Employee's Holidays to run the Holiday Load process and update the holidays on this individual's resource schedule.

Synchronizing with Third-Party Desktop Calendars

To synchronize with third-party desktop calendars, use the External Category Map component (RS_EMPL_EXTCALMAP) and Calendar Synchronization Options component (RS_SCHED_SYNCOPTS).

This section discusses how to:

- Map external categories.
- Specify calendar synchronization.
- Synchronize calendars.

This section discusses optional tasks. If you are not integrating with third-party desktop calendar applications, you do not need to complete the tasks that are discussed in this section.

Pages Used to Synchronize with Third-Party Desktop Calendars

Page Name	Object Name	Navigation	Usage
External Category Mapping	RS_EMPL_EXTCALMAP	Set Up Financials/Supply Chain, Product Related, Resource Management, Calendar, External Category Map, External Category Mapping	Map external categories to PeopleSoft Resource Management task categories.
Configure Calendar Synchronization Options	RS_SCHED_SYNCOPTS	Set Up Financials/Supply Chain, Product Related, Resource Management, Calendar, Synchronization Options, Configure Calendar Synchronization Options	Specify calendar synchronization options.
Synchronize Calendars	RUN_RS_CALSYNC	Set Up Financials/Supply Chain, Product Related, Resource Management, Calendar, Synchronize Calendars, Synchronize Calendars	Synchronize resource schedules with third-party desktop calendars.

Mapping External Categories

Access the External Category Mapping page.

External Category Mapping

Indicate which category name to use when mapping an appointment with an external calendar.

Task Category:

VACATION

External Category:

Vacation

External Category Mapping page

Task Category

Enter the PeopleSoft Resource Management appointment task category from the search page.

Note. Do not map Resource Management assignment task categories to third-party calendar application task categories.

External Category

Enter the equivalent task category for the third-party application. Map a PeopleSoft Resource Management task category to only one corresponding category.

Leave this field blank if you don't want to synchronize this PeopleSoft Resource Management task category with a third-party task category.

Note. If you don't want to synchronize a third-party task category to resource schedules, do not define a default PeopleSoft Resource Management task category when performing the synchronization.

Important! If you use the Resource Optimization feature, do not load or synchronize nonassignment meetings and personal appointments to resource schedules by using Microsoft Outlook or Lotus Notes. The Resource Optimization feature treats nonassignment meetings and personal appointments as days that a resource is unavailable to work on an assignment, even if the appointments don't affect the resource's availability on the resource schedule. To avoid synchronizing nonassignment meetings and personal appointments, do not map the associated PeopleSoft Resource Management task category to a third-party task category. An alternative method is to avoid using categories in Lotus Notes or Microsoft Outlook for nonassignment meetings and personal appointments. With either technique, do not define a default PeopleSoft Resource Management task category when performing the synchronization.

Specifying Calendar Synchronization Options

Access the Configure Calendar Synchronization Options page.

Configure Calendar Synchronization Options

EmplID: RS00000028

Espinosa,Marta

☒ Enabled

Notes User Name:

mespin

Notes Password:

Last Update Timestamp:

☐ Synch Flag

Configure Calendar Synchronization Options page

EmplID (employee ID)	Enter the employee ID whose calendar you are synchronizing.
Enabled	Select to activate synchronization options for this user. Activating this option synchronizes the user’s resource schedule with the third-party calendar application the next time that the Calendar Synchronization process runs based on settings in PeopleSoft Process Scheduler.
Notes User Name and Notes Password	Enter or modify the Lotus Notes user connection and password information. This field is available if you integrate with Lotus Notes.
Calendar Folder Name	Enter a calendar folder name in a format that matches the Microsoft Exchange format definition; for example, <i>Miller, William</i> or <i>William Miller</i> . The default format on this page is <first name> <last name>, such as <i>William Miller</i> . This field is available if you integrate with Microsoft Outlook. Note. To change the default format that appears on this page, modify the GetDefaultFolderName function that is located in FUNCLIB_RS_SCHD.FOLDER_NAME.FieldFormula.
Last Update Timestamp	Displays an automatic timestamp by the synchronization process.
Synch Flag (synchronize flag)	The system enables this check box if you submit a synchronization request for this user from the Monthly Calendar page. The system clears this check box if the user’s calendar is not scheduled for synchronization.

Synchronizing Calendars

Access the Synchronize Calendars page.

Synchronize Calendars

Run Control ID: SYNC_CALEDARS

[Process Monitor](#)

☐ **Sync All Calendars**

Default Category: Meeting ▼

Notes Server Name: NOTESSERVER

Log Trace: Off ▼

Log File Name: c:\temp\rscalsync.log

Synchronize Calendars page

Sync All Calendars
(synchronize all calendars)

Select to synchronize all calendar entries for resources who are enabled for synchronization on the Configure Calendar Synchronization Options page. Clear the Sync All Calendars option to synchronize only calendar entries that changed in PeopleSoft Resource Management since the previous synchronization process.

PeopleSoft Resource Management keeps track of changes on resource schedules. You can schedule the synchronization process to occur hourly to synchronize changes in resource schedules. You can then schedule the process to synchronize nightly to refresh all calendars. This is important because individual changes that are made in Lotus Notes and Microsoft Exchange are not detected by PeopleSoft Resource Management.

Default Category

Enter a default PeopleSoft Resource Management task category that is used to map any third-party task category that is not specifically mapped to another task category. All unmapped task categories are mapped to the default category.

Leave this field blank if you do not want to synchronize nonassignment meetings or personal information.

Note. To avoid synchronizing nonassignment meetings and personal appointments, do not map a PeopleSoft Resource Management task category to a third-party category containing nonassignment meetings and personal appointments, and do not select a default PeopleSoft Resource Management task category when performing the synchronization.

Notes Server Name

Enter the server name that contains the Lotus Notes calendar to use during synchronization. This field is available if you integrate with Lotus Notes.

Outlook Profile

Enter the profile of the Outlook installation that you set up on the PeopleSoft Process Scheduler machine if you use profiles in Microsoft Outlook. Leave this field blank if you do not use Outlook profiles. This field is available if you integrate with Microsoft Outlook.

Log Trace

Enter the type of log trace as needed for Process Scheduler.

On: Simple log statements are created to verify that accounts are synchronized.

Full: The log file contains detailed descriptions of what is taking place. Select this option when you want to debug installations and locate incorrect settings.

Off: No log file is created.

Log File Name

Enter the log trace filename as needed for Process Scheduler.

To schedule an individual calendar synchronization, click Synchronize Calendar on the Monthly Schedule page.

When modifications are made to a resource's schedule through an assignment or appointment process and the resource's synchronization options are configured, the calendar is automatically scheduled for synchronization. Resources can use this option if they know about changes in their third-party calendars that they want to synchronize to the resource schedule during the next opportunity.

Resource schedules in PeopleSoft Resource Management can synchronize only with shared calendars in Microsoft Outlook and Exchange or Lotus Notes and Domino. The local Outlook or Notes calendar applications do not synchronize to PeopleSoft calendars.

Consider scheduling the process for individual synchronization requests to occur several times during each day, and scheduling the process to synchronize all calendars less frequently. Use PeopleSoft Process Scheduler to schedule synchronizations.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

CHAPTER 15

Enabling Service Orders

This chapter provides an overview of service orders and discusses how to:

- Define service order priorities.
- Define service order defaults.
- Create qualification profiles.
- Create, update, and delete service order templates.

Understanding Service Orders

In PeopleSoft Resource Management, you use service orders to submit, track, and fulfill requests for services from external or internal customers. You create a service order to define the required services for a project and specify the criteria that the system uses to locate the appropriate resources.

Users with different roles in the organization have access to service orders. You specify a default value for service order priority at an organizational level. You can also specify other service order default values at an individual user level to speed service order entry.

This section discusses:

- Service order priorities
- Service order defaults
- Qualification profiles
- Service order templates

Service Order Priorities

Service order priorities define the importance levels that you can assign to service orders. Priority is an informational field; it does not control service order processing. You can filter service orders by priority on the Service Order Listing report. After defining priority levels, you can specify the priority default value that appears on all new service orders.

You must define service order priorities before you create service orders.

Service Order Defaults

A PeopleSoft Resource Management user with the authority to create a service order can specify a default value for the owning business unit, owning organization, and the person responsible for staffing service orders. An administrator can specify default values for other PeopleSoft Resource Management users. You can override service order default values on the service order.

Service order defaults are optional.

Qualification Profiles

A qualification profile predefines the standard traits for a specific job role, such as project manager or sales consultant, and stores them as a template for future use. A user who creates new service orders can use qualification profiles to identify the qualifications that are necessary for each resource request. When a qualification profile is selected, it populates the resource request with the competencies, desired levels of proficiency, importance settings, and accomplishments as defined on the qualification profile.

You can also associate a qualification profile with a project role in PeopleSoft Program Management. Then when you select the project role on a resource request, the competencies and accomplishments for the associated qualification profile automatically appear in the Qualifications region of the request. This association of qualification profiles with project roles is especially useful when you create service orders or initiate express searches for generic resources in PeopleSoft Program Management.

The setID is a key field on the qualification profile. You can select a qualification profile on a resource request if the business unit on the service order shares the same setID as the profile. Create qualification profiles with a shared setID if you have multiple business units that deliver identical services.

Qualification profiles are optional.

Service Order Templates

A service order template reduces the amount of work needed to create a service order by populating many of the fields with values that you define in advance. A service order template can include service order summary information and details for resource request lines.

Service order templates are optional.

Defining Service Order Priorities

To define service order priorities, use the Service Order Priority component (RS_SO_PRIORITY).

This section discusses how to establish or modify service order priorities.

Note. This section is required. You must complete the tasks that are discussed in this section to enable service orders in PeopleSoft Resource Management.

Page Used to Define Service Order Priorities

Page Name	Object Name	Navigation	Usage
Service Order Priority	RS_SO_PRIORITY	Set Up Financials/Supply Chain, Product Related, Resource Management, Service Order Priority, Service Order Priority	Establish or modify service order priorities.

Establishing or Modifying Service Order Priorities

Access the Service Order Priority page and enter a unique priority code.

Service Order Priority

Priority Code: H

Priority Description

Enter a sequence number to indicate a relative priority and a description to designate the priority of Service Orders.

Sequence Number:

***Description:**

Description:

Service Order Priority page

Sequence Number	Enter the relative importance of the priority. Assign the lowest number to the highest priority.
Description (short)	Enter the name of the code.
Description (long)	Enter a detailed description of the code.

Defining Service Order Defaults

To define service order defaults, use the My Service Order Defaults component (RS_OPR_OPTIONS_EM) or the Service Order Defaults component (RS_OPR_OPTIONS).

This section lists a prerequisite and discusses how to specify service order default values.

Note. This section is optional. If you do not plan to use service order defaults in PeopleSoft Resource Management, you do not need to complete the tasks that are discussed in this section.

Prerequisite

You must define an organizational tree before you can define service order default values.

See [Chapter 6, “Defining the Organization by Using Trees,” page 57](#).

Pages Used to Define Service Order Defaults

Page Name	Object Name	Navigation	Usage
Service Order Defaults for <User>	RS_OPR_OPTIONS	- Resource Management, Define User Options, My Service Order Defaults, Service Order Defaults for <User> - Set Up Financials/Supply Chain, Product Related, Resource Management, Service Order Defaults, Service Order Defaults for <User>	Specify default values for the person responsible for staffing the order, the owning business unit, and the owning organization for service orders entered by the user.
Service Order Owning Organization - Select an Organization	RS_ORGTREESEL_SEC	Click Select an Organization on the Service Order Defaults for <User> page. Click Advanced Search or Basic Search.	Enter the default owning organization for service orders that are entered by the user.

Specifying Service Order Default Values

Access the Service Order Defaults for <User> page.

Service Order Defaults for Kenneth Schumacher

The values entered below will be defaulted onto new Service Orders.

Responsible For Staffing:

Owning Business Unit: Japan Business Unit

Owning Organization:

Service Order Defaults for <User> page

Responsible For Staffing

Enter the staffing coordinator or other person responsible for fulfilling the service order. The person responsible for staffing receives new service orders submitted by the user. The service orders appear on the Fulfill Orders tab of the Staffing Workbench. In addition, if the service order workflow option is enabled on the Resource Management Options page for the service order business unit, the person who is responsible for staffing also receives a workflow notification for new orders submitted by the user.

Owning Business Unit

Enter the business unit to appear as the default owning business unit for new service orders entered by the user. This value determines the organizational tree from which you can select the default owning organization.

Note. You must select an owning business unit before you can select an owning organization.

Owning Organization

Enter the organization to appear as the default owning organization for new service orders entered by the user. This is the organizational unit that is responsible for the order, such as an organization that sells services to a customer and must ensure that the order is fulfilled.

Note. You cannot type the default Owning Organization field value—you must select it from the organizational unit tree on the Service Order Owning Organization - Select an Organization page that you access by clicking the Select an Organization icon.

See [Chapter 22, “Requesting Resources Using Service Orders,” Defining Owning Organizations, page 309.](#)

Creating Qualification Profiles

To create qualification profiles, use the My Qualification Profiles component (RS_RESRC_TEMPLT_SC) or the Qualification Profiles component (RS_RESRC_TEMPLT).

This section provides an overview of the steps to create a qualification profile and discusses how to create and update qualification profiles.

Note. This section is optional. If you do not plan to use qualification profiles in PeopleSoft Resource Management, you do not need to complete the tasks that are discussed in this section.

Understanding the Steps to Create a Qualification Profile

Follow these steps to create a qualification profile:

1. Enter the setID for the qualification profile if you are building profiles that users in the same setID share.
The setID value is your HR business unit if you are creating a qualification profile for your own use.
2. Enter the name of the qualification profile.
3. (Optional) Define the job tasks associated with the qualification profile if you are using PeopleSoft Human Resources Management (PeopleSoft HRMS) as the employee source database.
4. Complete all of the information that is relevant to the qualification profile.

Pages Used to Define Qualification Profiles

Page Name	Object Name	Navigation	Usage
Qualification Profile	RS_RESRC_TEMPLT	- Resource Management, Define Templates, Qualification Profiles, Qualification Profile - Resource Management, Define Templates, My Qualification Profiles, Qualification Profile	Create or modify qualification profiles for other users (if you are an administrator) or for yourself.
Competencies	RS_RESRC_TMPL_COMP	Click Add Competency on the Qualification Profile page.	Add, delete, or modify competencies on the qualification profile.
Delete Confirmation	EO_DEL_CONFIRM	Click Delete on an accomplishment row on the qualification profile.	Accept or cancel the action to delete an accomplishment from the qualification profile.

Creating and Updating Qualification Profiles

This section discusses how to build or modify qualification profiles for your own use or to share among specific setIDs. You can specify:

- The profile description.
- The job task in PeopleSoft HRMS that is associated with the profile.
- Profile competencies.
- Profile accomplishments.

Defining the Profile Description

Access the Qualification Profile page.

At the prompt, select the appropriate setID if you are building a qualification profile for users in a setID to share. The setID value is your HR business unit if you do not have access to build qualification profiles for other setIDs.

Go to the Profile Description group box.

Qualification Profile

PROJ MGR
SetID: SHARE

A qualification profile is a template of a type of resource. The profile consists of competencies and accomplishments that describe the resource. The competencies and accomplishments associated with a role can optionally be defaulted in when creating a qualification profile. The profiles can be used to facilitate creating a resource request on the service order. Create or modify the information below for the qualification profile. Press "Save" when you are finished filling out the form.

Profile Description

***Description:**

Comments:

Manages a team of resources at customer site.

☐ **This qualification profile is for my personal use only. Do not make this profile visible to any other users.**

Profile Description group box on the Qualification Profile page

Description	Enter a description so that users can identify the profile.
Comments	Enter relevant comments such as the profile's purpose, the type of resource it represents, its creator, or the date of the last modification.
This qualification profile is for my personal use only. Do not make this profile visible to any other users.	Select to make the qualification profile visible to the current user only. Clear to make the profile visible to all users who belong to a PeopleSoft Resource Management business unit with access to the setID.

Defining Role Competencies

Go to the Default Role Competencies group box.

This option is available if you use PeopleSoft HRMS as the only employee source database.

Default Role Competencies

Competency profiles from job task roles that have been created in your HRMS system can be used to facilitate creating a qualification profile. To default in competencies and accomplishments associated with a role, choose a job task role from the list then press the "Get Role Competencies" button. The competencies and accomplishments from the role will then be added to this qualification profile. Note that future changes to a role will not automatically be reflected in the profile but will be used for initial defaulting only.

Job Task:

Default Role Competencies group box on the Qualification Profile page

Job Task

Enter the job task that is associated with the qualification profile. When you search for a PeopleSoft HRMS job task to associate with this qualification profile, the setID controls the available tasks. The job tasks that are available to associate with the qualification profile have the same setID as the profile.

Get Role Competencies

Click to populate the profile with competencies and accomplishments that are associated with the role. The detailed competencies and accomplishments for the role appear in the Profile Competencies and Profile Accomplishments group boxes on this page.

Use this button to create a new profile or to add competencies and accomplishments from a role in PeopleSoft HRMS to an existing qualification profile. Changes to a role in PeopleSoft HRMS *do not* automatically update the qualification profile.

Defining Profile Competencies

Go to the Profile Competencies group box.

Profile Competencies

Select the competencies below that you would like the resource to have obtained.

*Competency	Description	Proficiency	Importance		Years of Work Experience
2004	Systems Analysis	5-Expert ▼	Desired ▼	Delete	2 Years ▼
4003	Project Management	3-Good ▼	Desired ▼	Delete	2 Years ▼
4015	Planning & Scheduling	5-Expert ▼	Desired ▼	Delete	1 Year ▼

Profile Competencies group box on the Qualification Profile page

You can modify the competency values that were populated with PeopleSoft HRMS values if you associated the qualification profile with a job task.

Competency

Enter the appropriate competency. Click the Look up Competency icon to search for a specific competency by competency, description, or category. Competency values are maintained in the employee source database.

Description	Displays the description of the competency. Description values are maintained in the employee source database.
Proficiency	Enter the desired level of proficiency that the resource should possess for this competency.
Years of Work Experience	Enter the number of years of work experience that the resource should possess for this competency. You can select from no years to 9+ <i>Years</i> .
Importance	Enter <i>Desired</i> or <i>Required</i> to indicate how important it is for the resource to possess the specified proficiency and number of years of experience for the competency. Designating a competency as required indicates that you will not consider a resource without at least the specified proficiency and requested number of years of experience.
Add Competency	Click to access the Competencies page where you can access the Competency tree (COMPETENCY) and select competencies from competency categories. Alternatively, you can search for a competency by key word or letters. Add, delete, or modify competencies and interests as required, and click Return to Qualification Profile to return to the Qualification Profile page.

See [Chapter 18, “Maintaining Resource Profiles,” Modifying Resource Competencies and Interests, page 233.](#)

Defining Profile Accomplishments

Go to the Profile Accomplishments group box.

Profile Accomplishments

Select the accomplishments below that you would like the resource to have obtained.

Select educational degrees below.

Degrees					
Accomplishment	Description	Major Code	Description	Importance	
BS	Bachelor of Science	M00001	Business Administration	Desired	Delete
MBA	Master of Business Admin	M00014	Management Information Systems	Desired	Delete
Add Degree					

Select languages below.

Languages						
Accomplishment	Description	Speak	Read	Write	Importance	
GE	German	High	Moderate	Moderate	Desired	Delete
Add Language						

Profile Accomplishments group box on the Qualification Profile page (1 of 2)

Select licenses below.

Licenses						
Accomplishment	Description	Country	State	Description	Importance	
					Desired	Delete
Add License						

Select memberships below.

Memberships			
Accomplishment	Description	Importance	
ASM	Association for Systems Mgmt	Desired	Delete
Add Membership			

Profile Accomplishments group box on the Qualification Profile page (2 of 2)

In the Accomplishment field in each of four group boxes—Degrees, Languages, Licenses, and Memberships—select the appropriate accomplishments from the list of all accomplishments stored in the employee source database.

You select an importance rating—desired or required—for each accomplishment. Designating an accomplishment as required indicates that you will not consider a resource without at least the requested accomplishment.

- Degrees

Specify a major code for each selected degree, and specify its importance.
- Languages

Specify the level of proficiency that the resource should possess to speak, read, and write the selected languages. Indicate the importance of all three.
- Licenses

Specify an issuing country and state for the selected licenses. Indicate the importance of both.
- Memberships

Specify the importance of each selected membership.
- Add <Degree, Language, License, or Membership>

Click to add a blank row to the accomplishment grid.
- Delete

Click to delete the corresponding row from the accomplishment grid. The Delete Confirmation page appears for you to confirm or cancel the action.

Creating, Updating, and Deleting Service Order Templates

This section discusses how to:

- Create or update service order templates.
- Delete service order templates.

Note. This section is optional. If you do not plan to use service order templates in PeopleSoft Resource Management, you do not need to complete the tasks that are discussed in this section.

Pages Used to Create, Update, and Delete Service Order Templates

Page Name	Object Name	Navigation	Usage
Service Order Template - Resource Request	RS_SO_TMPLT_REQS	Resource Management, Define Templates, Service Order Template, Resource Request	Store common resource request details that you can use to populate new service orders.
Service Order Template - Order Summary	RS_SO_TMPLT_SUM	Click Order Summary on the Service Order Template - Resource Request page.	Store common service order summary information that you can use to populate new service orders.
Resource Management User Options - Select an Organization	RS_ORGTREESEL_SEC	Click Owning Organization on the Order Summary page. Click Advanced Search or Basic Search.	Select the default organization that is responsible for delivering services.
Service Order - Additional General Information	RS_SO_SUMM_MORE	Resource Management, Define Templates, Service Order Template, Order Summary, Additional General Information, Service Order - Additional General Information	Enter values for flexible resource attributes for the resource request line on the template.
Service Order - Location and Contact Details	RS_REQ_LOCCNTC_SEC	Resource Management, Define Templates, Service Order Template, Order Summary, Change Location/Contact Information, Service Order - Location and Contact Details	Enter location and contact information for the resource request line on the template.
Delete Service Order Template	RS_SO_DELTEMPLATE	Resource Management, Define Templates, Delete Templates, Delete Service Order Template	Delete a service order template.

Creating and Updating Service Order Templates

This section discusses how to:

- Define resource request template details.
- Define the order summary template.

Defining Resource Request Template Details

Access the Service Order Template - Resource Request page.

Resource Request

Order Summary

Template ID: ASSOCIATE

Entered by: Schumacher,Kenneth

Date: 11/15/2003

Customer ID: JPN02

Tekno-Sporto, Japan Ltd.

Resource Request

Find | View All

First 1 of 1 Last

Description: Associate Consultant

Quantity: 1

Project Role: Project Consultant

Days of work:

Qualifications

Keywords

Notes

Type	Description	Importance	Years of Work Experience	Proficiency		
1 Competency	PeopleCode	Desired	2 Years	3-Good		-
2 Competency	PS nVision Reporting	Desired	1 Year	3-Good		-
3 Competency	PS Query	Desired	2 Years	4-Very Good		-
4 Language	Business English	Desired			Details	-

Add qualifications from:

Profile

List

Competency Tree

Service Order Template - Resource Request page

Template ID

Assign a unique service order template ID when you access the Service Order Template component (RS_SO_TMPLT).

Note. All service order IDs and service order template IDs must be unique.

Customer ID

(Optional) Enter a customer ID.

Resource Request

(Optional) Enter information in any resource request field that commonly appears in recurring service orders.

See [Chapter 22, “Requesting Resources Using Service Orders,” Defining Resource Requests, page 302.](#)

Defining the Order Summary Template

Access the Service Order Template - Order Summary page.

Resource Request		Order Summary	
Template ID:	ASSOCIATE	Entered by:	Schumacher,Kenneth
		Date:	11/15/2003
Order Information			
Order Description:	PeopleSoft implementation at Tekno-Sporto, Japan Ltd.		
Customer ID:	JPN02	Tekno-Sporto, Japan Ltd.	
Project:	IMPLEMENT06	Implementation	
Location:	Main	Contact:	
Owning Business Unit:	JPN01	Owning Organization:	Sales and Services
Responsible For Staffing:	Jones,Catherine		
▼ Resource Requests in this Order Find First 1 of 1 Last			
1	PROJ CONSULTANT	Associate Consultant	Additional General Information Change Location / Contact Information
Desired:	PeopleCode, PS nVision Reporting, PS Query, Business English		

Service Order Template - Order Summary page

Order Information

Enter order information that commonly appears in recurring service orders. The field values that you enter here appear in the order summary on new service orders when you use the template to create a new service order.

Note. You cannot type the default Owning Organization field value—you must select it from the organizational unit tree on the Resource Management User Options - Select an Organization page that you access by clicking the Select an Organization icon.

See [Chapter 22, “Requesting Resources Using Service Orders,” Entering Order Summary Information, page 306.](#)

Additional General Information

Click to access the Service Order - Additional General Information page, where you can enter additional attribute values for an individual resource request line.

See [Chapter 22, “Requesting Resources Using Service Orders,” Adding Additional Resource Request Information, page 313.](#)

Change Location / Contact Information

Click to access the Service Order - Location and Contact Details page, where you can specify a different location or contact for an individual resource request line.

See [Chapter 22, “Requesting Resources Using Service Orders,” Changing Locations or Contacts, page 314.](#)

Deleting Service Order Templates

Access the Delete Service Order Template page.

Template ID

Enter the template to delete from the Delete Template search page.

Delete

Select Delete to delete the template.

Save

Click Save to perform the action.

Existing service orders are not affected when you delete a service order template.

Note. PeopleSoft Resource Management users share service order templates; therefore, only system administrators should have permission to delete the templates.

CHAPTER 16

Enabling Resource Matching and Cache Processes

This chapter discusses how to:

- Establish resource groups.
- Define flexible attributes.
- Administer cache and maintenance processes.

Establishing Resource Groups

To establish resource groups, use the Resource Groups component (RS_RESOURCE_GROUPS).

This section provides an overview of resource groups and discusses how to:

- Define resource groups.
- Establish resource group details.

The tasks that are discussed in this section are required. You must establish at least one resource group in order to use the Express Search page, the Staffing Workbench - Manage Utilization page, or the Resources Needing Assignments operational summary portal pagelet that is available in PeopleSoft ESA Portal Pack.

Understanding Resource Groups

Resource groups are collections of resources that you define by organizational unit or supervisor ID. You use them to limit a search for resources on the Express Search page and the Staffing Workbench - Fulfill Orders page. In addition, a manager selects the resources to appear on the Staffing Workbench - Manage Utilization page by specifying a resource group.

Users can access only the resource groups that they create.

See Also

[Chapter 3, “Understanding Resource Matching,” Resource Groups, page 21](#)

Pages Used to Establish Resource Groups

Page Name	Object Name	Navigation	Usage
Resource Group Definition - Resource Groups	RS_RESOURCE_GROUPS	- Resource Management, Define User Options, Resource Group Setup, Resource Group Definition - Resource Groups - Resource Management, Define User Options, My Workbench Options, Workbench Click Add Resource Groups on the My Workbench Options - Workbench page. - Resource Management, Express Search, Express Search Click Add Resource Groups on the Express Search page. - Resource Management, Staffing Workbench, Fulfill Orders Click Add Resource Groups on the Staffing Workbench - Fulfill Orders page. - Resource Management, Staffing Workbench, Manage Utilization Click Add Resource Groups on the Staffing Workbench - Manage Utilization page.	Add or modify resource groups and select active resource groups.
Resource Group Definition - Resource Group Details	RS_RSRCGRP_ADD	- Click Add on the Resource Group Definition - Resource Groups page. - Click Edit on the Resource Group Definition - Resource Groups page.	Add or modify resource group details.

Defining Resource Groups

Access the Resource Group Definition - Resource Groups page.

Resource Group Definition

Resource Groups

Available Groups

Find | View All |  First ◀ 1-4 of 4 ▶ Last

Active	Group ID	Name		
☒	ALL RESOURCES	All Resources	Edit	Delete
☐	ASSETS	Capital Projects	Edit	Delete
☒	CONSULTING	Consulting Corp	Edit	Delete
☒	MFG SUPPORT	Manufacturing Support	Edit	Delete

Add

Resource Group Definition - Resource Groups page

Active Select the resource groups to appear as options in the Resource Group ID field (RS_RSRCGRP_NAME) on the Express Search page, the Staffing Workbench, and the My Workbench Options - Workbench page.

The default value is *Active* (check box selected) for new resource groups.

Group ID and Name Displays information about the resource group.

Edit Click to access the Resource Group Definition - Resource Group Details page to view or edit the group.

Delete Click to delete the group.

Add Click to access the Resource Group Definition - Resource Group Details page to add a new resource group.

Establishing Resource Group Details

Access the Resource Group Definition - Resource Group Details page.

Resource Group ID Enter a unique group identifier. This is a required field.

Name Enter a name that describes the resource group. This is a required field. If you designate the resource group as active on the Resource Group Definition - Resource Groups page, the resource group name is available for selection on the Express Search page, the Staffing Workbench, and the My Workbench Options - Workbench page.

Select Organization Structure Select to establish a resource group based on an organization unit.

Select by Supervisor ID Select to establish a resource group based on a supervisor ID.

Important! You must enter a supervisor on the Update Employee Data - Employee Job page for all resources before you can use resource groups that are based on a supervisor ID.

Advanced Search or Basic Search

Select either method to search for organizations to include in the resource group.

The Advanced Search or Basic Search options are available only if you are establishing a resource group based on organization unit.

Finding Organizations Using the Basic Search

Access the Resource Group Definition - Resource Group Details basic search page.

Resource Group Details

*Resource Group ID

MFG SUPPORT

*Name

Manufacturing Support

☒ Select Organization Structure
 ☐ Select by Supervisor ID

[Advanced Search](#)

You can choose from the available Organization Hierarchies. Enter a Hierarchy name or click on the "Find" button to search for a name.

Organization Hierarchy Name

CORPORATE SETID

Select an Organization

When the hierarchy is displayed, click on the name of the organization you would like to select for your Resource Group. Once selected, the organization name will be displayed in the Resource Group Definition grid.

[Left](#) | [Right](#)

- CONSULTING CORP - Consulting Corp
 - HUMAN RESOURCES - Human Resources
 - INFORMATION SERVICES - Information Services
 - PUBLIC RELATIONS - Public Relations
 - AUDITING - Auditing
 - ADMINISTRATION - Administration
 - BUSINESS SERVICES - Business Services
 - SALES AND SERVICES - Sales and Services
 - SERVICES - INDUSTRY - Services - Industry
 - RESEARCH - Research
 - MANUFACTURING - Manufacturing Line of Business
 - 42000 - Manufacturing Support
 - ENGINEERING - Engineering
 - NO-DEPTID - No Department

Resource Group Definition

Find | View All | First 1 of 1 Last

Hierarchy Name	Name	Description	
CORPORATE SETID	Manufacturing Support	Department - 42000	

Resource Group Definition - Resource Group Details basic search page

Use this page to select organizations from the organizational unit tree to associate with the resource group.

Organization Hierarchy Name

Enter the setID that is associated with the organizational unit tree.

Click the lookup button to search for the setID by description. The search page contains a list of setIDs that have an organizational unit tree associated with them.

The tree enables you to navigate the organization's hierarchy and find the appropriate unit to associate with this group. You can select a tree node such as a group of departments, or a tree detail such as a specific department.

When you select the setID, the organizational unit tree appears in the Select an Organization group box.

Select an Organization

Expand the organizational unit tree to view all organizations. Select the desired organization to include in the resource group. You can select any level on the tree to include in the resource group

You must select at least one organization for the resource group.

Resource Group Definition

Displays the setID name, organization name, and organization description for each selection.

Delete rows as needed.

OK

Click OK to return to the Resource Group Definition - Resource Groups page. The new resource group appears in the Available Groups grid.

Click Save on the Resource Group Definition - Resource Groups page to save new or modified resource groups.

Cancel

Click to discard the changes and return to the Resource Group Definition - Resource Groups page.

Finding Organizations Using the Advanced Search

Access the Resource Group Definition - Resource Group Details advanced search page.

Resource Group Definition

Resource Group Details

*Resource Group ID

MFG SUPPORT

*Name

Manufacturing Support

☒ Select Organization Structure

☐ Select by Supervisor ID

Basic Search

You can choose from the available Organization Hierarchies. Enter a Hierarchy name or click on the "Find" button to search for a name.

Organization Hierarchy Name

CORPORATE SETID

Search for Organizations

Search for an organization by entering all or part of the organization name in the box below and then clicking on the "Find" button. Wild card characters (* or %) can be used. All searches are case sensitive

Find Organizations Like

%Manufacturing%

Find

Select an Organization

Find | View All |

First 1-2 of 2 Last

☐	Name	Description
☐	Manufacturing Line of Business	Node - MANUFACTURING
☒	Manufacturing Support	Department - 42000

Select

Resource Group Definition

Find | View All |

First 1 of 1 Last

Hierarchy Name	Name	Description	
CORPORATE SETID	Manufacturing Support	Department - 42000	

Resource Group Definition - Resource Group Details advanced search page

Use this page to search for organizations to associate with the resource group.

Organization Hierarchy Name

Enter the setID that is associated with the organizational unit tree.

Find Organizations Like

Enter an organization name, or enter the first characters of the name followed by a wildcard (* or %). To search using characters within the name, enter a wildcard, enter any contiguous characters, and then enter another wildcard.

Searches are case-sensitive.

Note. To view all organizations in the tree, use the Resource Group Definition - Resource Group Details basic search page.

Find

Click to perform the search. The list of organizations that match the search criteria appears in the Select an Organization grid.

Select an Organization

Select the check box next to organizations to include in the resource group. You can select tree nodes or tree detail values.

You must select at least one organization for the resource group.

Select

Click to populate the Resource Group Definition grid with the selected organizations.

Creating Resource Groups by Supervisor ID

Access the Resource Group Definition - Resource Group Details page. Select the Select by Supervisor ID option.

Resource Group Definition

Resource Group Details

*Resource Group ID

LANE

*Name

Supervisor George Lane

☐ Select Organization Structure

☒ Select by Supervisor ID

You can search for Supervisors by using the Supervisor's Employee ID, First or Last Name. Use the "Search by" drop down box to select a search method and then enter the search text in the next box. Click on the "Search" button to find the Supervisors that meet your criteria.

Search by

Last Name

Last Name

L

Search

Search Results

Find | View All | First 1 of 1 Last

	Name	Supervisor ID	Location	Department
☒	George Lane	RS00000001	USA - California	Sales and Services

Select

Resource Group Definition

Find | View All | First 1 of 1 Last

Name	Supervisor ID	
George Lane	RS00000001	Delete

Select by Supervisor ID view of the Resource Group Definition - Resource Group Details page

Use this page to create a resource group based on one or more supervisor IDs.

Search by and Last Name

Select the search type and enter the supervisor's last name, first name, or employee ID. You can search using the first characters of the name or employee ID. To search using characters within the name or employee ID, enter the wildcard (%), enter any contiguous characters, and then enter another wildcard.

A supervisor is available for selection if the supervisor's employee ID appears in the Supervisor ID field (SUPERVISOR_ID) on the Employee Job - Update Employee Data page for at least one eligible resource.

Searches are not case-sensitive.

Search	Click to execute the search. The list of supervisors that match that search criteria appears in the Search Results grid.
Search Results	Select the check box next to one or more supervisors.
Select	Click to add selections to the Resource Group Definition grid. You must select at least one supervisor to establish the resource group.
Resource Group Definition	Displays the supervisor name and ID for each selection.
Delete	Click to delete the Resource Group Definition row. The Resource Group Definition - Resource Group Details page remains open.

Defining Flexible Attributes

To define flexible attributes, use the Flexible Attributes Setup component (RS_ATTRIB_SETUP).

This section provides an overview of flexible attributes and discusses how to specify flexible attributes.

Note. The tasks in this section are optional. If you do not use flexible attributes in PeopleSoft Resource Management, you do not need to complete these tasks.

See Also

[Chapter 3, “Understanding Resource Matching,” Flexible Attributes, page 17](#)

Understanding Flexible Attributes

You can define and instantly implement a new attribute of a resource and resource request using a flexible attribute. If you modify the attribute, such as changing the valid values, PeopleSoft Resource Management immediately implements the changes. The attribute can be used for information only, or it can be used as a factor in the Resource Matching Application Engine process (RS_DF) to determine fit scores.

Page Used to Define Flexible Attributes

Page Name	Object Name	Navigation	Usage
Define Flexible Attributes	RS_ATTRIB_SETUP	Set Up Financials/Supply Chain, Product Related, Resource Management, Define Flexible Attributes, Define Flexible Attributes	Define flexible attributes.

Specifying Flexible Attributes

This section discusses how to:

- Enter basic attribute information.
- Define attribute values.

- Define attribute use.

Attribute Basics

Access the Define Flexible Attributes page.

Define Flexible Attributes

Attribute ID: INDUSTRY

Change any of the fields below. Press the "save" button at the bottom of the page when you are finished filling out the form.

Attribute Basics

*Attribute Name:

Attribute Description:

Attribute Basics group box on the Define Flexible Attributes page

Attribute ID	Enter a unique identifier.
Attribute Name	Enter a name that is recognizable to users when the system prompts them to enter values for the attribute.
Attribute Description	Enter a description that is used for documentation only. The attribute description does not appear elsewhere in PeopleSoft Resource Management.

Attribute Values

In the Attribute Values group box, specify the record containing the valid values for an attribute, or define the values on this page.

Attribute Values

Would you rather list the valid values of this attribute here, or are the valid values already listed elsewhere?

☐ **Use values listed elsewhere**

What record are the valid values stored on? **Record:** 

☒ **Use values listed here**

Enter the values in the table below, putting one value of the attribute on each line. Use the Add button to add more values. Use the Delete button to remove the unwanted values.

Value	*Description	
Education	Education	Delete
Financials	Financial Industries	Delete
Manufactur	Manufacturing	Delete
Retail	Retail Services	Delete
Utilities	Utilities	Delete

For this attribute, how many values can be associated with a single resource or service order resource request?

☒ **Only one value** ☐ **Many values**

Attribute Values group box on the Define Flexible Attributes page

Use values listed elsewhere Specify the table from which users select valid values for this attribute. The table must be a valid PeopleSoft prompt table and have only one key field.

Use values listed here Enter the attribute value name and description, and click Add to insert additional values. Use a name that is recognizable to users when the system prompts them to select attribute values for a resource or resource request.

Only one value Select to permit users to specify only a single value of the attribute for a resource or resource request.

Many values Select to permit users to specify multiple values of the attribute for a resource or resource request.

Each flexible attribute can be defined to enable either a single value or multiple values for a resource or resource request. An example of a single-value resource attribute is region. Typically, each resource is assigned to only one region; therefore, you would define the region attribute to allow only one value for each resource. An example of a multiple-value resource attribute is industry specialty. Because a resource may have more than one industry specialty, the industry specialty attribute would allow multiple values for each resource.

Attribute Use

In the Attribute Use group box, specify how the attribute is used. Your selection controls where the attribute appears in PeopleSoft Resource Management. Modify the selection as business needs change.

Attribute Use

How would you like to use this attribute? Users will see the attribute on different pages depending on these settings.

☒ **Use this attribute for informational purposes only.**

☒ **Track this attribute for each service order.**
 When this option is selected, service order users are able to use the attribute to help describe the assignment. A field named after this attribute will appear on the service order Additional General Information page.

☒ **Track this attribute for each resource.**
 When this option is selected, resources are able to use the attribute to help describe themselves. Users will see a field named after this attribute on the General Info page while maintaining Resource Profiles.

☐ **Use this attribute to help match resources to assignments.**

Selecting either of the options below creates a new factor that can be used when analyzing fit between resources and resource requests. To enable this factor to be utilized by the match process, establish its relative importance on the Resource Management Installations Options Page.

☐ **Let the service order user request resources with specific values for this attribute.**
 Values for this attribute will need to be maintained for each resource on the General Info page of the Resource Profile. On the Qualifications page of the resource request, the service order user will have the option of requesting resources with specific values for this attribute. Resources that have the requested values receive higher qualification scores.

Name of the factor:

☐ **Let resources indicate their preferences for assignments with regard to this attribute.**
 Values for this attribute will be captured on the service order Additional General Information page. Resources will be able to express their preferences regarding the attribute on the Preferences page while maintaining their Resource Profiles. Resources that prefer the value specified for the assignment receive higher Preference scores.

Name of the factor:

Attribute Use group box on the Define Flexible Attributes page

Use this attribute for informational purposes only

Select if the attribute is for information only and is not used as a factor in the Resource Matching process to determine fit scores.

Track this attribute for each service order

Select to establish a service order attribute. The user specifies values for this attribute on the Service Order - Additional General Information page for the resource request.

Track this attribute for each resource

Select to establish a resource attribute. The resource can specify values for this attribute on the General Information page of the resource profile.

Use this attribute to help match resources to assignments

Select to establish the attribute as a factor in the Resource Matching process to determine fit scores.

Let the service order user request resources with specific values for this attribute

Select to establish the factor as a Flexible Qualification factor. The attribute is used to:

- Specify additional information on a resource profile.
The resource can specify values for this attribute on the Resource Profile - General Info page.
- Specify additional qualifications on a resource request.
The resource request user can specify values for this attribute on the Qualifications tab of the Resource Requests page.
- Create a new match factor used by the Resource Matching process to determine fit scores.

The resource's fit score associated with this factor is included in the Qualifications factor family fit score.

Enter the name of the factor—either the name that is established for the attribute or a different name—to appear on the Installation Options - Resource Management page and the Cache Administration - Refresh Match Cache page.

Note. Users can select as many values as they need for a flexible qualification factor on a resource request. For multiple-value attributes, users indicate if each value is desired or required. For single-value attributes, users indicate an importance weighting of *Desirable* or *Very desirable* for each value. Users can also indicate that only resources with one of the requested single-value attributes will be considered.

Let resources indicate their preferences for assignments with regard to this attribute

Select to establish this factor as a Flexible Preference factor. The attribute is used to:

- Specify preferences on a resource profile.
Resources can specify values for the attribute on the Resource Profile - Preferences page and rate their preference from *0–Very undesirable* to *4–Very desirable*.
- Specify additional information on a resource request.
The resource request user can specify values for the attribute on the Service Order - Additional General Information page.
- Create a new match factor to include in the Resource Match engine calculations of factor fit scores.
The Resource Match engine analyzes how well resource request attribute values match resource preferences. A resource's fit score that is associated with this factor is included in the Preferences factor family score for the resource request.

Enter the name of the factor—either the name that is established for the attribute or a different name—to appear on the Installation Options - Resource Management page and the Cache Administration - Refresh Match Cache page.

Important! After you create a new flexible factor, you must indicate its relative importance within the factor family on the Installation Options - Resource Management page.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Setting Installation Options for PeopleSoft Applications,” Setting Up PeopleSoft Resource Management Installation Options.

Administering Cache and Maintenance Processes

This section provides overviews of cache administration processes, Resource Match engine temporary work tables, the Verity search index, and the Match Cache table, and discusses how to:

- Refresh cache tables and purge data.
- Maintain the Verity search index.
- Refresh the Match Cache table.
- Run the Cache Administration program.

Understanding Cache Administration Processes

The Cache Administration Application Engine program (RS_CACHE_AD) manages the execution of cache and maintenance processes that are required periodically in PeopleSoft Resource Management. The cache processes update cache tables that are used by various PeopleSoft Resource Management activities such as fulfilling service orders and managing resource utilization. The maintenance processes purge unnecessary data from the system such as obsolete factor fit scores.

You can select processes and—using PeopleSoft Process Scheduler—run them immediately or schedule them to run at intervals during a time when system usage is low. You can run processes individually or they can be logically batched, such as by required interval.

Cache administration does not include processes that are typically required only at implementation (such as a process to load holidays) or as part of a normal business process (such as a process to create resources in batch).

Understanding Resource Match Engine Work Tables

The Resource Match Engine feature uses temporary work tables when calculating factor fit scores and retrieving search results. To maintain optimal system performance you must routinely clear the tables of unnecessary data as part of your database maintenance procedure.

This is a list of the temporary work tables that are used by the Resource Match engine:

- RS_ASSIGN_FIT_W
- RS_DF_ACC_ALL_W

- RS_DF_ACC_AND_W
- RS_DF_ACC_DTL_W
- RS_DF_ACC_LNG_W
- RS_DF_ACC_OR_W
- RS_DF_ACC_W
- RS_DF_AVA_W
- RS_DF_BID_W
- RS_DF_CALC
- RS_DF_EXP_W
- RS_DF_FAC_IMP_W
- RS_DF_FACF_TMP
- RS_DF_FWA_AND_W
- RS_DF_FWA_DTL_W
- RS_DF_FWA_OR_W
- RS_DF_FWA_RR_W
- RS_DF_FWA_RR1_W
- RS_DF_FWA_RR2_W
- RS_DF_FWA_W
- RS_DF_FWP_PRE_W
- RS_DF_FWP_RR_W
- RS_DF_FWP_RR1_W
- RS_DF_FWP_RR2_W
- RS_DF_FWP_RR3_W
- RS_DF_FWP_W
- RS_DF_INT_CMP_W
- RS_DF_INT_DTL_W
- RS_DF_INT_PRE_W
- RS_DF_INT_RR_W
- RS_DF_INT_W
- RS_DF_PRO_AND_W
- RS_DF_PRO_CMP_W
- RS_DF_PRO_DTL_W
- RS_DF_PRO_OR_W
- RS_DF_PRO_W

- RS_DF_REC_W
- RS_DF_RES_W
- RS_DF_WEIGHT_W
- RS_DF_YRS_AND_W
- RS_DF_YRS_CMP_W
- RS_DF_YRS_DTL_W
- RS_DF_YRS_OR_W
- RS_DF_YRS_W
- RS_WRKR_ATVAL_W

The Cache Administration program includes an option to clear obsolete data from the temporary work tables. Schedule this option to run nightly at a time when system usage is the lowest.

While obsolete data is being cleared from the work tables, transactions that impact Resource Match engine factor fit score calculations may not occur. These transactions include:

- Service order updates.
- Updates to resource profiles or resource schedules.
- Searches for resources or service orders in the Staffing Workbench component or My Assignments component.
- Running the Resource Optimization Solve Application Engine process (RS_OPTIMIZE).

Understanding the Verity Search Index

PeopleSoft Resource Management uses the Verity search engine for two purposes:

- The Resource Match engine uses the Verity search engine to determine a resource's fit for a resource request for the Work Experience and Resume factors.

During the process of calculating fit scores, the Work Experience and Resume factors use the Verity index to find work experience entries in a resource profile—or text in a resume attachment—that match the keywords that are specified on a resource request.

- The Express Search features uses the Verity search engine to determine which resources meet the specified qualifications and keywords criteria and calculate a fit score.

To use the Verity search engine, you must:

- Establish and maintain the Verity search index by running the Cache Administration program to create or update an index of competencies, accomplishments, work experience, and default resume-attachment information for each eligible resource.

You establish one index that is used by the Express Search feature and the Resource Match engine.

- Configure the Application server and Process Scheduler with the location of the Verity search index.

Note. The Verity index is separate from the database. The indexing process is a snapshot of the database at one point in time and does not remain synchronized with the data stored in the database unless you routinely update the index.

Use the Verity searching capabilities delivered with PeopleSoft Resource Management. If you do not use the Verity search engine, you cannot perform an express search for resources, and the Resource Matching process cannot calculate fit scores for Work Experience and Resume factors.

Batch Input Files

The indexing process extracts information from the database and loads it into Verity-formatted files on the Process Scheduler server. The Verity indexing application transforms the files into an index that is used for searching.

The indexing process creates two files per language—EXPRESS_SEARCH_INP.TXT and EXPRESS_SEARCH_DAT.TXT. The EXPRESS_SEARCH_INP.TXT file is used to define each resource that is indexed. It also populates the fields that are defined for PeopleSoft Resource Management in the style.ufl file, and it defines the location of the data in the EXPRESS_SEARCH_DAT.TXT file. The EXPRESS_SEARCH_DAT.TXT file contains the database information to be indexed for a resource. On the Process Scheduler server the files have the format INPUT_<Language Code>.txt (for example, INPUT_ENG.txt) and DATA_<Language Code>.txt (for example, DATA_ENG.txt). The Verity search engine creates the index based on the INPUT and DATA files that are in the Index File Path directory specified on the Index Administration page.

The indexing process creates two files per language. For English they are INPUT_ENG.BIF and DATA_ENG.DAT. The first file defines the Verity document and includes all information for the Verity fields in the index, the resource's resume location, and pointers to the second file (in the form of offset and size). The second file contains the remainder of the data—the Verity zones. On the Process Scheduler server the files have the following format:

- INPUT_<Language Code>.BIF (for example, INPUT_ENG.BIF)
- DATA_<Language Code>.DAT (for example, DATA_ENG.DAT)

The Verity search engine creates the index based on the INPUT and DATA files in the Index File Path directory that is specified on the Process Scheduler configuration file (psprcs.cfg). To accomplish this, the indexing process invokes a Verity utility named *mkvdk*. Verity uses the nine folders that created by this utility to perform searches.

A-B Model Structure

PeopleSoft Resources Management uses a Verity model structure—known as the *A-B model structure*—that guarantees that the Verity search index is available at all times for searching. The Create Search Index program creates an *A* version of the index, which is used for searching. When you refresh the index, the program creates a *B* version and switches all searching to the new model when the update is complete. During the next update cycle the program refreshes the *A* model and makes it available for searching when the update is complete.

Style Files

Style files are delivered with PeopleSoft Resource Management and are used to define the index structure for Verity. Do not change the style files. When you install PeopleSoft Resource Management, the following style files are installed in the directory \$PS_HOME\data\search\FDM_RS_Resource\Style:

- style.ddd
- style.dft
- style.did

- style.ngm
- style.pdd
- style.prm
- style.sfl
- style.sid
- style.tkm
- style.ufl
- style.uni
- style.vgw
- style.wld
- style.xfl
- style.xml
- vgwfsys.cfg.
- vgwfsys.gfl
- vgwfsys.prm
- vgwfsys.vgw
- vgwhhttp.cfg
- vgwhhttp.gfl
- vgwhhttp.prm
- vgwhhttp.vgw

Understanding the Match Cache Table

Factor fit scores are stored in a Match Cache table (RS_FACTOR_FIT), and they are retrieved when you:

- Search for resources to fulfill potential assignments using a resource request.
- Search for resource requests for a resource.
- View the job scorecard.

Fit score caching is a technique that provides immediate access to fit scores.

The Resource Match engine is a set of subengines—each in charge of determining a factor fit of a resource to a resource request. Routine changes to a resource request, resource profile, or resource schedule trigger an automatic recalculation of specific fit scores. The subengines determine which changes require a fit score recalculation. For example, if dates change on a resource request, only the Availability factor subengine recalculates fit scores. The other subengines do not process the change.

When certain nonroutine events occur in the system, such as when data changes on the Job (JOB) or Installation (INSTALLATION_RS) records, you must manually recalculate fit scores to ensure that they remain current for each combination of a resource and resource request. You can recalculate fit scores by selecting an individual factor or by grouping the factors in logical batches and running the Resource Matching process. You can run the recalculation immediately or schedule the process to run at intervals during a time when system usage is low.

Pages Used to Administer Cache and Maintenance Processes

Page Name	Object Name	Navigation	Usage
Cache Administration - Miscellaneous	RS_CACHE_MISC	Set Up Financials/Supply Chain, Product Related, Resource Management, Cache Administration, Miscellaneous	Initiate Resource Management Application Engine processes to refresh cache tables or purge unnecessary data.
Cache Administration - Maintain Search Index	RS_SRCH_INDEX	Click Maintain Search Index on any Cache Administration page.	Configure the Verity environment and create a search index from competencies, accomplishments, preferences, resource work experience information, and resume attachments.
Cache Administration - Refresh Match Cache	RUN_RS_DF	Click Refresh Match Cache on the Cache Administration page.	Recalculate and cache selected factor fit scores for all eligible resources.
Cache Administration - Summary	RS_CACHE_SUMMARY	Select Summary on the Cache Administration page.	Confirm the list of processes that you want to run or schedule for the future.

Refreshing Cache Tables and Purging Data

Access the Cache Administration - Miscellaneous page.

Miscellaneous | Maintain Search Index | Refresh Match Cache | Summary

Run Control ID: CACHE_ADMIN

Process Selection

- ☒ Refresh Resource Organizational Unit Cache
- ☒ Refresh Resource Schedule Cache
- ☒ Refresh Factor Family Applicability Cache
- ☒ Purge Service Order Change Tracking
- ☒ Refresh Current Eligible Resources
- ☒ Purge Obsolete Match Cache
- ☒ Purge Match Engine Work Tables
 - ☒ Do not update statistics
 - ☐ Update statistics

Cache Administration - Miscellaneous page

Refresh Resource Organizational Unit Cache

Select to update the Resource Organizational Unit Cache table (RS_WORKER_ORG) that stores organization information from the specified organization tree. The program is required when:

- Resources are created individually using the Establish Employee As Resource component (RS_WRKR_CREATE).
- Resources are created in batch using the Create Resources Application Engine process (RS_CW).
- A node or detail value changes on the organization tree.
- A new organization tree is implemented.
- A resource's organization unit value changes, such as the resource's department.
- Implementation occurs.

Run this program nightly.

Refresh Resource Schedule Cache

Select to update the Resource Date Cache table (RS_DF_WRKR_DATE) that is used to track a resource's schedule. The program purges old availability date and ineligible resource data. It is required when:

- Standard hours or days change on the Installation Options - Resource Management page.

Note. You must also refresh the Availability factor fit scores in the Match Cache table.

- New holidays are added to the holiday schedule and loaded using the Holiday Load Application Engine process (RS_HOLIDAY).

Note. You must also refresh the Availability factor fit scores in the Match Cache table.

- Implementation occurs.

This program runs automatically for a resource when the resource's schedule changes. Run the program manually for all resources as required.

Refresh Factor Family Applicability Cache

Select to update the Factor Cache table (RS_DF_RR_FAC) and Factor Family Cache table (RS_RR_FAC_FAM), which are used to record the applicability of factors and factor families to each resource request. The program is required when:

- Weight points change for any factors on the Installation Options - Resource Management page.
- A flexible factor is disabled.

Run the program only as required.

Purge Service Order Change Tracking

Select to purge the Service Order Audit table (RS_SO_AUDIT) of all resource requests that are associated with a closed service order. The program is required to keep the table to a manageable size.

Run this program nightly.

Refresh Current Eligible Resources

Select to update the Eligible Resource Cache table (RS_ELGBL_WRKR) with current eligible resource information. In addition to tracking the current, eligible resources, the table stores the resource's job-related information such as job code, location, and bill rate. The program is required when:

- Routine changes are made to a resource's job-related information.
- Resources are created in batch using the Create Resources process.

Run this program nightly and as required.

Purge Obsolete Match Cache

Select to purge old fit scores for resources, resource requests, and flexible factors from the Match Cache table. The program is required when:

- A resource becomes ineligible.
- A flexible factor is disabled.

Run this program nightly.

Purge Match Engine Work Tables

Select this option to clear temporary work tables that are used by the Resource Match engine of all obsolete data.

Do not update statistics: Select this option to clear obsolete data from Resource Match engine temporary work tables without updating table statistics.

Update statistics: Select this option for the system to update table statistics before it clears obsolete data from Resource Match engine temporary

work tables. Subsequently, select this option when table statistics need to be refreshed as part of routine database maintenance.

Important! This process will fail if it runs while any transactions are occurring that impact Resource Match engine factor fit score calculations. If the process fails, the next time the process runs it will clear the obsolete data. A single process failure does not create a system problem, as long as the process completes successfully at least every two to three days so you can maintain optimal performance.

Run this program nightly.

Save

Click to save the run control, or select Index Administration, Refresh Match Cache, or Summary to proceed to other Cache Administration pages.

Maintaining the Verity Search Index

This section discusses how to:

- Configure the servers with the location of the Verity search index.
- Create or update the Verity search index.

Configuring the Servers with the Location of the Verity Search Index

You must configure the Application server and Process Scheduler with the location of the Verity search index. This step must occur before the index is created and before the index can be used to search for resources.

To set up the Verity environment:

1. Open the Application server (psappsrv.cfg) and Process Scheduler (psprcs.cfg) configuration files.
2. Under the section *[Search Indexes]*, add an entry *FDM_RS_RESOURCEA* and an entry *FDM_RS_RESOURCEB*, and set the path to the Verity index by using the following format:

<INDEX NAME>=<LOCATION>

A Windows NT example is: *FDM_RS_RESOURCEA=C:\PT844\DATA\SEARCH*.

A UNIX example is: *FDM_RS_RESOURCEB=/ds1/pt844/data/search*.

A folder with the name of the index (*FDM_RESOURCEA* and *FDM_RESOURCEB*) is created in the specified path, so both entries can point to the same location.

Note. The index name is case-sensitive in a UNIX environment; use upper case.

3. If the Application server is on a different machine than the Process Scheduler, map a network drive on the Application server to the Process Scheduler. Alternatively, copy or move the index to the machines running the application server.
4. In a multiple Application server environment, add these entries to each Application server.
5. Provide the Application server and Process Scheduler with security access to the directory containing the index and the directory containing resume attachments.

Note. Configure the File Transfer Protocol (FTP) server on the same platform as the Process Scheduler—either Windows NT or UNIX—so that Verity can read the resume files.

Creating or Updating the Verity Search Index

Access the Cache Administration - Maintain Search Index page.

Cache Administration - Maintain Search Index page

Run this process with the Create New option selected as often as you want to refresh the search index with current database information. The Update option accomplishes the same result by first purging the existing index and then updating resource information. The difference in system performance between the two options is insignificant. Therefore, Create New is the best option.

Run Control ID	Displays the process run control ID that you entered to initiate the Cache Administration process.
Maintain Search Index	Select to create the search index as part of this Cache Administration run control.
Indexing Options	Select an action to take. Options are: <i>Create New:</i> Select this option to delete the existing index and create a new one. Use this option to routinely replace the Verity index. <i>Update:</i> to update the existing index without deleting it.
Index Language	Specify the index to run for all installed languages or a single language.

Style File Directory

Specify the location of the style files for PeopleSoft Resource Management. When you install Resource Management, the style files are installed in the following directory:

\$PS_HOME\data\search\FDM_RS_RESOURCE\style

The Style files do not have to stay in that specific directory as long as the Process Scheduler has access to them to create the index.

A Windows NT example is: *U:\data\search\FDM_RS_RESOURCE\style.*

A UNIX example is: */ds1/ps/psasgrp/easa/data/search/FDM_RS_RESOURCE/style.*

This field is required to create the search index.

Resume Attachment Directory

Specify the location of the attachments using the Uniform Naming Convention protocol. Because the indexing process runs on the Process Scheduler, you must enter the path in the context of the machine running the Process Scheduler.

A Windows NT example is: *\\ResumeFileServer\ftproot\.*

This field is not required for the indexing process to run. Leave this field blank if you do not have resume attachments set up and there are no resumes attached to any of the resource profiles.

Note. Configure the FTP server on the same platform as the Process Scheduler—either Windows NT or UNIX—so that the Verity search engine can read the resume files.

Save

Click Save to save the run control, or select Miscellaneous, Refresh Match Cache, or Summary to access other Cache Administration pages.

The length of time it takes to update the index depends on the number of active resources and language translations that are processed.

At the end of the index creation process, the INPUT and DATA files contain the database information. The indexing process then calls the Verity search engine to build the index as a set of directories and files. If any problems occur during the creation of the index, the errors are captured in the log file sysinfo.log, which is located in the same directory as the index.

Refreshing the Match Cache Table

Access the Cache Administration - Refresh Match Cache page.

Miscellaneous Maintain Search Index **Refresh Match Cache** Summary

Run Control ID: MATCH_CACHE

Process Selection

☒ Refresh Match Cache

Refresh cache for these factors

The match process factor fit scores will be recalculated and cached for the factors listed below. If no factors are listed, no cached fit scores will be refreshed.

Factors		
Accomplishments	+	-
Availability	+	-
Competency Experience	+	-
Competency Interest	+	-
Competency Proficiency	+	-
Dress Code	+	-
Manager Recommendations	+	-
Project Experience	+	-
Region	+	-
Resource Bids	+	-
Resume	+	-

Cache Administration - Refresh Match Cache

Run the program at implementation and as required.

Refresh Match Cache

Select to include the Refresh Match Cache Application Engine process (RS_DF) as part of this Cache Administration run control.

Factors

Add rows and select values to specify the fit scores to recalculate with this run control.

Calculate or recalculate all fit scores when:

- Implementation occurs.
- The Create Resources process (RS_CW) runs.

Recalculate specific factor fit scores as noted here.

Availability: Recalculate when:

- Standard hours or standard days change on the Installation Options - Resource Management page.

- Standard hours change on the Job record.
- New holidays are added to the holiday schedule and loaded with the Holiday Load process.

Competency Experience: Recalculate when the evaluation type changes on the Installation Options - Resource Management page.

Competency Interest: Recalculate when:

- Review points change for the Interest rating model (*INT*).
- Evaluation type changes on the Installation Options - Resource Management page.

Competency Proficiency: Recalculate when:

- Review points change in the rating model.
- Evaluation type changes on the Installation Options - Resource Management page.

(Flexible Preference Factor): Recalculate when the review points change for the Interest rating model (*INT*).

Save

Click to save the run control, or select Miscellaneous, Index Administration, or Summary to access other Cache Administration pages.

Note. If you update the Verity search index and refresh the match cache using separate run controls, schedule the Verity search index update to occur before the match cache update. This ensures that you use the most current information to recalculate factor fit scores.

Running the Cache Administration Program

Access the Cache Administration - Summary page.

Miscellaneous Maintain Search Index Refresh Match Cache **Summary**

Run Control ID: MATCH_CACHE Process Monitor Run

Process List

- ☒ Refresh Resource Organizational Unit Cache
- ☒ Refresh Resource Schedule Cache
- ☒ Refresh Factor Family Applicability Cache
- ☒ Purge Service Order Change Tracking
- ☒ Refresh Current Eligible Resources
- ☒ Purge Obsolete Match Cache
- ☒ Maintain Search Index
- ☒ Refresh Match Cache
- ☒ Purge Match Engine Work Tables
 - ☒ Do not update statistics
 - ☐ Update statistics

Cache Administration - Summary page

This page lists the selected processes that are included in the Cache Administration run control. The processes that do not contain a check mark are not included in this run control.

Run Click to save the run control and proceed to the Process Scheduler Request page to run the program or schedule it to run later.

Save Click to save the run control but not run the program.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

CHAPTER 17

Enabling Resource Optimization

This chapter provides an overview of resource optimization and discusses how to define, register, and create solution sets.

Note. This chapter is optional. If you do not plan to use the Resource Optimization feature, you do not need to complete the tasks that are discussed in this chapter.

Understanding Resource Optimization

The Resource Optimization feature enables organizations to fulfill resource requests in an optimal fashion. Resource Optimization evaluates all open resource requests against available employee resources and proposes a staffing plan that enables you to achieve the organization's objectives.

This section lists prerequisites and discusses:

- Resource optimization process flow.
- PeopleSoft Optimization Framework.
- Optimal solution sets.
- Optimization processes.
- Resource optimization weighted objectives.
- Optimization objectives, parameters, and rules.
- Transactions that affect optimal solution sets.

Prerequisites

This section lists prerequisites to using the Resource Optimization feature:

- Verify that the Process Scheduler server has adequate system specifications to run resource optimization processes.

The system performs a complex set of algorithms to generate optimal solution sets and stores each solution set in memory for access by the application. The system must have the memory, storage, and processing speed that are appropriate for your business practices.

System requirements rise with the size of the organization. For example, the memory required to calculate a solution set is a function of the number of open resource requests and active resources in the business units that belong to the set, as well as the average number of days between resource request days of work and latest start date. If many resource requests in the system have more period days (the number of work days between the start date and the end date) than days of work (the number of days that it takes to actually complete the work), then the start date is somewhat flexible. This flexibility provides the Resource Optimization feature with more possible solutions to evaluate.

Important! Install a Process Scheduler domain that is dedicated to run resource optimization processes on a separate physical server.

- Configure the Process Scheduler domain with the Optimization Engines enabled.

Important! Each optimization process run requires a dedicated Optimization Engine. If you run optimization processes concurrently, there must be an equivalent number of Optimization Engines enabled.

- (Optional) Configure the Application Server domain with Optimization Engines.

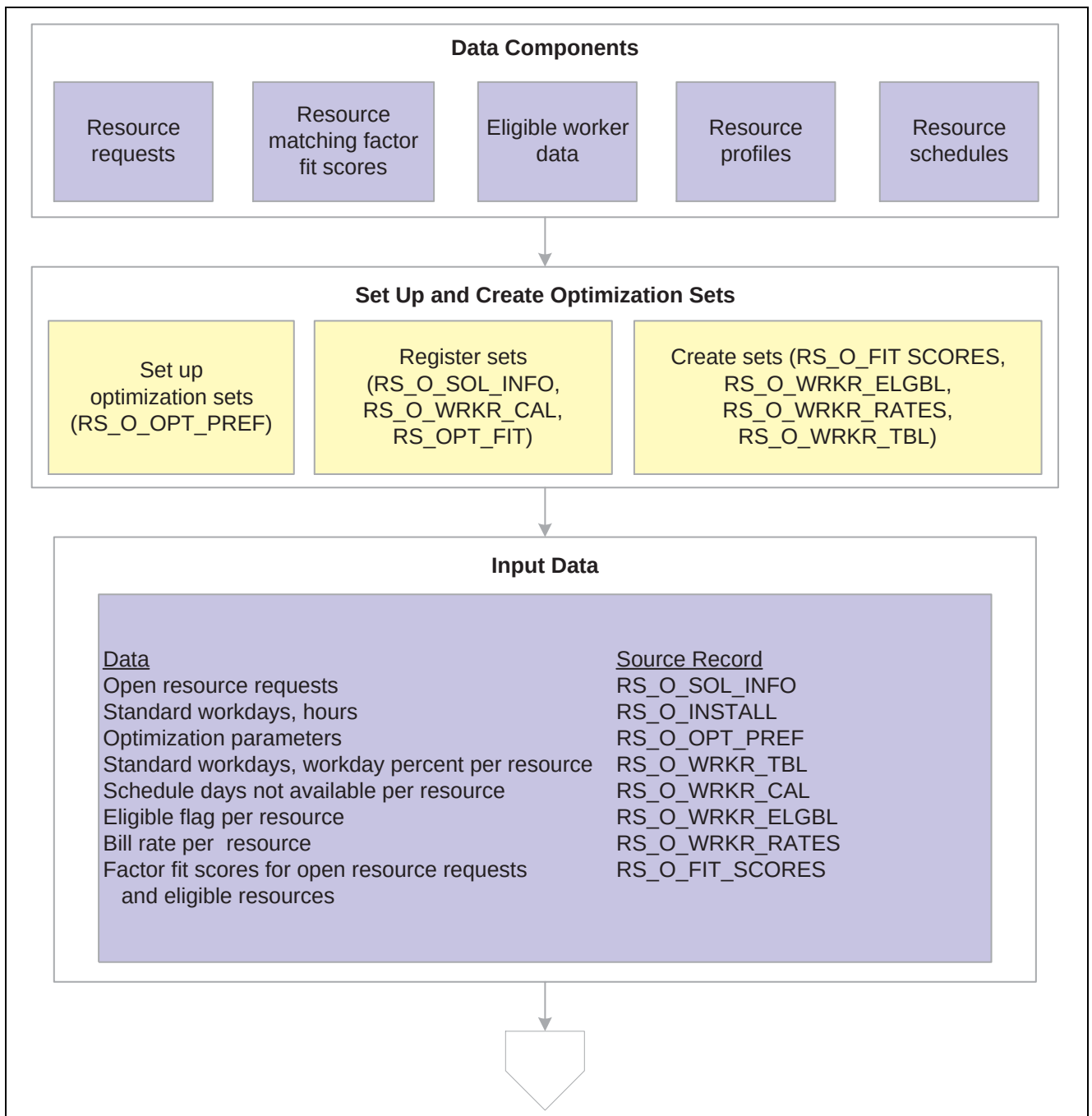
See *PeopleTools 8.44 Hardware and Software Requirements Guide*, “Appendix D: Financials/ESA Hardware and Software Requirements” on the PeopleSoft Customer Connection website for information on requirements for the Resource Optimization feature.

See Also

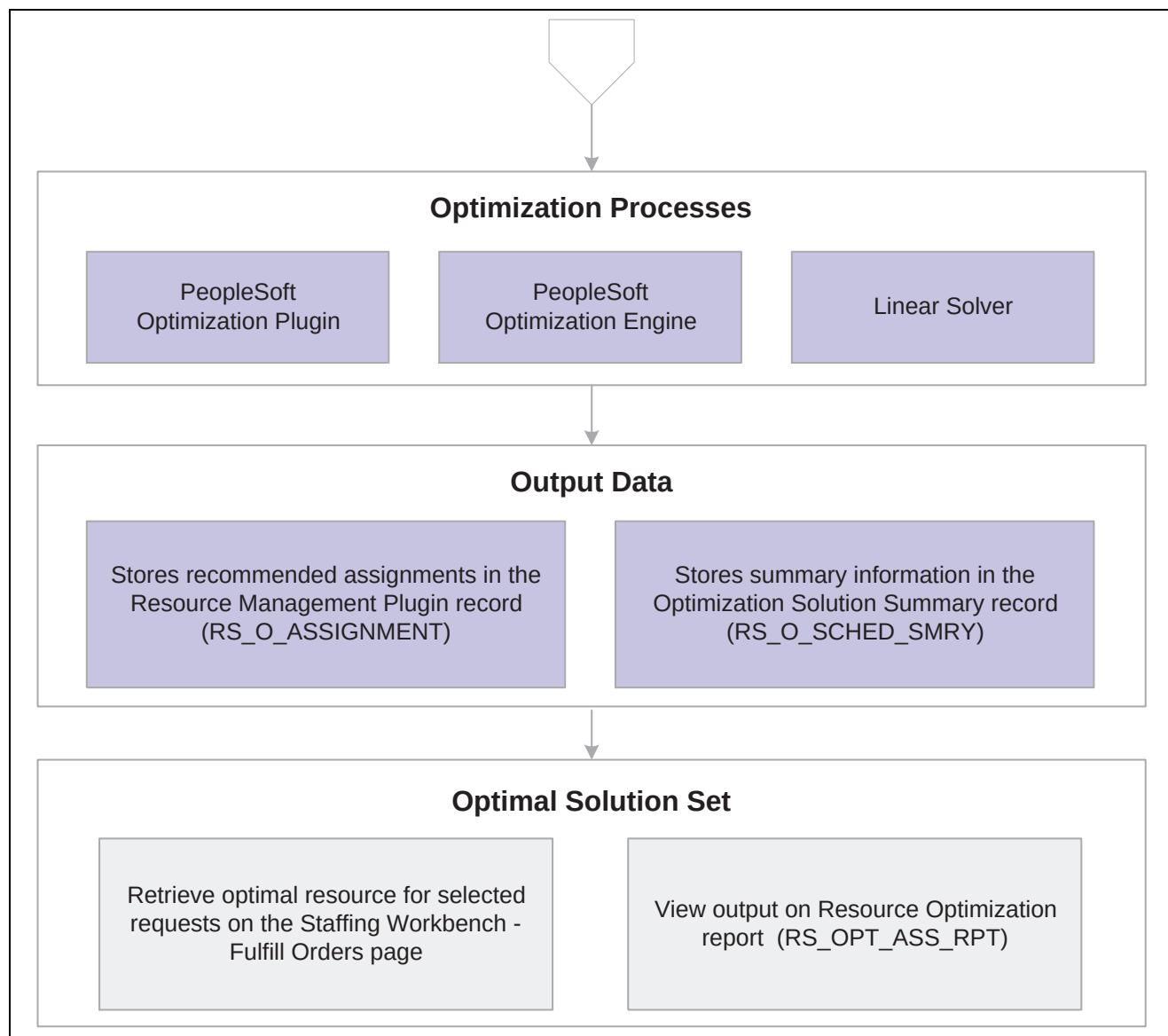
PeopleTools PeopleBook: PeopleSoft Optimization Framework

Resource Optimization Process Flow

The following diagram shows the data components that fuel the Optimization Engine calculations, optimization setup steps, input data, optimization processes, and output data that create Optimal Solution Sets. Included in parenthesis are the record names that are updated by a process.



Resource Optimization process flow diagram (1 of 2)



Resource Optimization process flow diagram (2 of 2)

PeopleSoft Optimization Framework

The Resource Optimization feature is based on PeopleSoft Optimization Framework, which provides the foundation for applications that use optimization-based, decision-making capability within the PeopleTools environment. PeopleSoft Optimization Framework adds new elements to PeopleSoft Internet Architecture: the optimization application tables, dispatcher, engine, and plug-in. The PeopleSoft system uses advanced optimization techniques to provide the best plan for deploying resources to fulfill open resource requests.

See Also

PeopleTools PeopleBook: PeopleSoft Optimization Framework

Optimal Solution Sets

Optimization processes can be scheduled to run in optimization sets on one or more servers running processes in parallel for different groups of human resources (HR) business units. The system provides an optimal solution set for each group of business units. These solution sets represent the optimal pairing of available employee resources to open resource requests based on weighted objectives that you define. You determine which business units belong to a set; however, you can assign each business unit to only one set.

In PeopleSoft Resource Management, you can use the solution set in two ways:

- On the Staffing Workbench, you can select requests for which you want to view the optimal resources.

Optimal resources are retrieved from the current optimal solution set for the business unit. Resources can be retrieved from different current optimal solution sets at the same time if you select resource requests from different business units. Once you retrieve the optimal resources for one or more requests, you can perform individual staffing actions, such as assigning an optimal resource to a suggested resource request. Alternatively, you can staff the optimal solution, which assigns the optimal resources for all selected resource requests that appear on the workbench. The optimal resource for a specific request remains the same until a new optimal solution set is generated for the business unit.

- You can use the Reports folder to view the Resource Optimization report.

When you navigate to the Resource Optimization report, you are prompted to select a solution set. You review the solution set to find the optimal pairing of available resources to open resource requests.

Creating separate optimal solution sets for business units reduces processing time. In a large organization with many possible combinations of resources and resource requests, it is faster to create a solution set for a subset of business units. You can set up resource optimization for different optimization sets on separate servers so that the system can quickly create optimal solution sets.

Optimization Processes

The Resource Optimization feature uses Application Engine processes to maintain data, load data, and create optimal solution sets. The processes are:

- Register Optimization Set (RS_OPT_REG).
- Unregister Optimization Set (RS_OPT_UNREG).
- Synchronize Fit Scores (RS_OPT_SYNC).
- Solve (RS_OPTIMIZE).

Register Optimization Set and Unregister Optimization Set

Run the Register Optimization Set process after you define a set. You must repeat the registration process for a set if the list of associated business units changes. The process performs the following actions for each optimization set included in the run control:

1. Deletes existing data associated with the specified optimization set, calculates the fit scores for the resource-and-resource request combinations in the set, and loads fit scores for the set into the Optimization Fit Score table cache (RS_OPT_FIT).
2. Registers the set as a valid optimization set.
3. Loads service order and resource request data into the Optimization Information table (RS_O_SOL_INFO).

4. Loads resource and schedule data into the Optimization Resource Schedule table (RS_O_WRKR_CAL).

The Unregister Optimization Set process deletes all data associated with the specified sets in PeopleTools and PeopleSoft Resource Management tables, and it unregisters the optimal solution set. This process is rarely required. However, you can delete the data associated with an optimization set if you determine that it is no longer useful.

You might use the Unregister Optimization Set process, for example, if you encounter a system problem when creating a new optimal solution set and optimization results from the previous solution set already exist. If the run fails before the optimization tables are updated, you can unregister the set, then register and run the Solve process again to ensure that you have clean results.

Synchronize Fit Scores

The Synchronize Fit Scores process is included in the Solve process that is described next. It synchronizes the fit scores if there are any resource or resource request changes that affect the scores. The Synchronize Fit Scores process updates the Optimization Fit Score cache table.

Solve

The Solve process first calls the Synchronize Fit Scores process to calculate the fit scores based on the most recent resource requests and resources. Then it creates the optimal solution set based on weighted objectives that you define.

You can define and schedule multiple optimization sets, and for each set you specify:

- HR business units.

The Resource Optimization feature evaluates only employee resources and resource requests in the specified business units for this optimization set. Resource business units are defined in the Job table. A resource request's HR business unit is specified as the owning business unit on the service order.

- Optimization weighted objectives and thresholds.

Weighted objectives indicate the levels of importance for fitness, on-time completion, and revenue. The thresholds indicate the desired values for minimum fit score and maximum days late.

The old solution remains visible while a new solution is generated. After the new solution is generated, the old solution is discarded and only the new solution is visible.

Note. Schedule the Solve process to run every 30 minutes for each optimization set to ensure that day-to-day application data changes appear in the solution within an hour.

Resource Optimization Weighted Objectives

The Solve process pairs resources with resource request lines based on these weighted objectives:

Objective	Description
Fitness	The Resource Match engine calculates a Qualification factor family fit score which groups the fit scores for accomplishments, competency proficiency, competency experience, work experience, resume, manager recommendations, and any defined flexible qualification factors. The Resource Optimization feature uses this Qualification fit score when it evaluates candidates for a resource request.
On-time completion	You can use the number of assignments completed within a specified time frame to measure the optimal staffing solution. To maximize all objectives, the Resource Optimization feature might return a solution with different assignment start and end dates from the dates specified in particular resource requests.
Revenue	The Resource Optimization feature fulfills as many resource requests as possible to maximize revenue to meet other objectives. In simple cases, the Resource Optimization feature might place resources with the highest standard billing rate in the longest assignments with the earliest start dates. In other cases, the Resource Optimization feature might suggest resources with high standard billing rates for requests that have no other available qualified candidates, and it might suggest other resources for longer assignments to generate additional revenue. The Resource Optimization is capable of making such trade-off decisions.

You determine the importance of maximizing these objectives relative to one another. For example, if revenue is the only business objective, then you can maximum revenue by with the highest billing rate to all of the resource requests. However, using that strategy might cause more assignments to be completed late. In addition, the Resource Optimization feature might regularly suggest less-qualified candidates, and some resources may be under-utilized.

Optimization Objectives, Parameters, and Rules

In addition to the three weighted objectives, the Solve process uses other parameters and rules to determine the optimal staffing solution. The parameters are variable, so you assign values for them each time you schedule a set. The rules are fixed and can be treated as *hard constraints* (that is, the Solve process does not recommend a staffing solution if it conflicts with the rules) or *soft constraints* (the Solve process can recommend a staffing solution that does not adhere to the rules).

Variable Parameters

You assign values for these parameters each time that you schedule a solution set:

Parameter	Description
Minimum fit score	This is the lowest Qualification fit score that the Resource Optimization feature can use when it matches available resources to open resource requests. For example, if the threshold has a value of 70 percent, only resources with a Qualification fit score of 70 percent or higher are considered for a resource request. If no resource within the specified scope has a Qualification fit score of at least 70 percent for the resource request, the Resource Optimization feature indicates that the resource request cannot be fulfilled.
Maximum days late	This is the number of days past a resource request end date that the Resource Optimization feature can propose that a resource be assigned. For example, assume that a resource request has a start date of January 5, 2004, an end date of March 17, 2004, and 50 days of work. If the maximum days late is 3, the service order must be finished on or before March 22, 2004, if the working days of the resources are from Monday to Friday. The Resource Optimization feature does not recommend any assignment for this resource request with the end date of the assignment later than March 22, 2004. Regardless of the number of days that an assignment is allowed to run late, the Resource Optimization feature gives preference to resources who maximize all the objectives and who are available within the resource request start and end dates.

Fixed Rules

You cannot configure these fixed rules:

Rule	Constraint Type	Description
Double-booking	Hard	The Resource Optimization feature does not propose a solution that double-books a resource.
Early start date	Soft	The Resource Optimization feature schedules an assignment at the earliest possible date considering all other constraints.
Multiple assignments per day	Hard	The Resource Optimization feature does not propose a solution that assigns a resource to more than one assignment per day, even if the service order allows partial days. Important! Do not load or synchronize nonassignment meetings and personal appointments to resource schedules using Microsoft Outlook, Lotus Notes, or other third-party calendar applications if you use the Resource Optimization feature. The Resource Optimization feature treats nonassignment meetings and personal appointments as days that are unavailable for resources to work on assignments, even if the appointments don't affect their availability on the resource schedules.

Rule	Constraint Type	Description
Assignment density	Soft	The Resource Optimization feature maximizes assignment density in the proposed solution. This means that, ideally, resource requests are fulfilled with minimal schedule breaks and the resources work approximately the same schedules on the project. Assignment density is equal to <i>days of work / (latest assignment day - earliest assignment day + 1)</i>. In this calculation, the latest assignment day is the last working day that the Resource Optimization feature suggests for any resource in a given solution. The earliest assignment day is the earliest working day that the Resource Optimization feature suggests for any resource in the same solution.
Owning organization	Hard	The Resource Optimization feature uses resources for resource requests only if they exist in the owning organizational unit that is specified on the service order.
Past-dated open resource requests	Soft	An open resource request with a start or end date before the current date can be included in the staffing solution. Although the application does not adjust the original dates on the resource request, the Resource Optimization feature adjusts the dates for its calculations. First, it treats the start date as equal to the current date, because it would not be logical to book a resource into the past. Then, it evaluates the days of work to determine if the current date plus the days of work exceeds the original end date on the resource request. If it does not exceed the original end date, the Resource Optimization feature does not adjust the end date for its calculations. If, however, the current date plus the days of work exceeds the original end date, then the Resource Optimization feature adjusts the end date only as much as necessary to accommodate the days of work.
Personnel status	Hard	The Resource Optimization feature evaluates resources for resources requests only if the resources have the personnel status <i>Employee</i> . Resources with the personnel status <i>Non-Employee</i> are not evaluated.
Quantity (number of resources) requested	Soft	If multiple resources are requested on a resource request line and the Resource Optimization feature cannot find the requested quantity of resources who meet all the parameters, it can return a solution with fewer resources than requested.

Rule	Constraint Type	Description
Relationships between service order lines	Not applicable	The Resource Optimization feature evaluates each line individually and develops a solution based on the weighted objectives and hard constraints, without evaluating relationships between resource request lines on a service order. If resources on separate lines must be on site at the same time, assign the same start date, end date, and days of work for the related resource request lines. In addition, do not leave a wide request time frame window. If there are approximately as many days between the start date and the end date as there are days of work, the Resource Optimization feature is more likely to assign resources who start on the same day.
Required qualifications	Hard	If a resource does not meet a qualification designated as required on the resource request, the Resource Optimization feature does not recommend that resource for the resource request.
Resource request days of work	Hard	The days of work are entered on the resource request line when the engagement is defined, and it indicates the estimated number of work days required to complete the job. The Resource Optimization feature calculates the required work hours as <i>number of hours in a standard workday</i> multiplied by the <i>requested days of work</i> . If no resource is available for the requested number of work hours, the Resource Optimization feature does not fulfill the request.
Resource requests with pending assignments	Hard	The Resource Optimization feature develops a staffing solution for all open resource requests that are not being fulfilled. It does not propose a solution for a resource request that has an associated assignment with the status <i>Assigned</i> , <i>Pending Approval</i> , or <i>Reserved</i> .
Standard work days	Hard	The number of hours in a full workday is specified during PeopleSoft Resource Management installation. On a resource request, <i>days of work</i> is the number of full work days required to complete the job. If a resource's standard number of hours worked per day is fewer than the number of hours in a full workday, the resource is treated as part-time. The Resource Optimization feature recommends only resources who are full-time workers. Although some assignments may allow partial work days, only full-time workers can be recommended for the assignments.

Rule	Constraint Type	Description
Start and end dates	Soft	The Resource Optimization feature evaluates the best candidates for an assignment by determining candidates who are available for the resource request between—and including—the start date and end date. However, the Resource Optimization feature evaluates the entire window of time between the start and end date plus maximum days late as available for an assignment. If a resource request specifies more than one date range, the Resource Optimization feature uses the earliest start date and latest end date from a consolidation of the requirement dates on the resource request. If the Resource Optimization feature cannot find available resources who meet all objectives within the requested start and end dates, it can return a solution that suggests adjustments to the start and end dates. You control the extent of these suggestions by setting the weighting for the on-time completion objective and the maximum days late constraint.
Work-sharing	Not applicable	The Resource Optimization feature does not support work-sharing arrangements. For example, if a resource request seeks one resource for 20 days, the Resource Optimization feature does not propose a solution with two resources for 10 days each.

Transactions That Affect Optimal Solution Sets

A solution set provides a snapshot of the optimal staffing solution for specified business units at a single point in time. The solution becomes out of date through the normal course of daily transactions.

The following changes to a service order or resource request can affect the solution set for the corresponding business unit:

- Service order status.
- Service order owning organization.
- Resource request competencies or qualifications.
- Resource request status.
- Resource request start and end dates.
- Resource request days of work.
- Resource request quantity.
- Creation of a new resource request.
- Creation or update of an assignment with the status *Reserved*, *Pending Approval*, or *Assigned* that is associated with a resource request.

The following changes related to a resource can affect the solution set for the corresponding business unit:

- Resource competencies or qualifications.
- Resource eligibility.
- Resource schedule.
- Resource HR business unit.
- Resource organizational unit.
- Resource personnel status.

Defining, Registering, and Creating Solution Sets

To define, register, and create solution sets, use the Resource Optimization Setup component (RS_OPT_ADMIN).

This section discusses how to:

- Define optimization sets.
- Register and create solution sets.

Pages Used to Define, Register, and Create Solution Sets

Page Name	Object Name	Navigation	Usage
Resource Optimization Setup	RS_OPT_ADMIN	Set Up Financials/Supply Chain, Product Related, Resource Management, Setup Optimization, Resource Optimization Setup	Define an optimization set ID and specify weighted objectives, parameters, and business units.
Administer Resource Optimization	RUN_RS_OPTIMIZE	Set Up Financials/Supply Chain, Product Related, Resource Management, Resource Optimization, Administer Resource Optimization	Select solution sets to include in a run control.
Process Scheduler Request	PRCSRQSTD LG	Click Process Request on the Administer Resource Optimization page.	Schedule or run processes to register, unregister, or create solution sets.

Defining Optimization Sets

Access the Resource Optimization Setup page.

Resource Optimization Setup

Find | View All First 2 of 3 Last

*Optimization Set ID: US001-3 Description: Business Units US001, US003

Select Optimization Parameters

Fitness: 4-Very Important Minimum fit score: 40.00 %

On-time completion: 3-Important Maximum days late: 3

Revenue: 2-Somewhat Important

Business Unit	Description		
US001	GBI BU for US001	+	-
US003	GBI BU for US003	+	-

Resource Optimization Setup page

Optimization Set ID and Description

Enter a new optimization set ID and description for each group of business units that share a unique set of weighted objectives and variable optimization parameters.

Fitness

Enter the relative importance of qualification fitness in the proposed staffing solution. Options range from *1-Not Very Important* to *5-Critical*. If you select a higher value, the Resource Optimization feature is more likely to suggest a resource with a high Qualification fit score for a resource request.

On-time completion

Enter the relative importance of completing assignments by the end date specified on the resource request. The importance level determines when the Resource Optimization feature suggests adjustments to resource request start and end dates. Options range from *1-Not Very Important* to *5-Critical*.

Revenue

Enter the relative importance of creating a schedule that maximizes total revenue generated from the assignments. Options range from *1-Not Very Important* to *5-Critical*.

Note. This objective takes into account a resource's billing rate (revenue), not salary (cost). If you use PeopleSoft Resource Management primarily to staff internal projects, or if maximizing revenue is not a priority, consider assigning a lower weight to this objective. If a resource doesn't have a standard billing rate, the system uses the billing rate that is associated with the resource's job code in the Job Code Rates table (PC_RATE_JOBC). If neither value exists, the bill rate value is \$0.0000.

Minimum fit score	Enter the minimum Qualification fit score (which the Resource Match engine derives) that the Resource Optimization feature can use for the solution set. Resource Optimization does not use resources with a fit score below this threshold. The default value is <i>50.00</i>.
Maximum days late	Enter the maximum number of days past the resource request end date that the Resource Optimization feature can suggest a resource to fulfill a resource request. The system default value is <i>10</i>, indicating that a proposed resource assignment can run 10 days past the end date.
Business Unit	Enter the HR business units to include in this solution set. Only resources and resource requests in the specified business units are evaluated by the Resource Optimization feature for a particular set. The HR business unit of a resource is the business unit on the Job record (JOB). The HR business unit of a resource request is the service order owning business unit. If you enter a business unit that is included in another solution set and try to save the page, a message appears stating that the business unit appears more than once in optimization sets. You must delete the business unit from the grid before you can save the page.

Add rows to the scroll area to set up additional optimization set IDs.

Registering and Creating Solution Sets

The steps to register and create solution sets are:

1. Select the optimization sets to include in the run control.

You can select sets and execute the optimization processes immediately or schedule them to run at intervals during a time when system usage is low. Optimization sets can be created individually or logically batched, such as by required interval.

2. Register and create the solution sets.

The first time that you create an optimal solution for a set, register the optimization set by running the Register Optimization Set process. Repeat the registration process for the set only if the list of associated business units changes. Run the Solve process each time that you want to create a new optimal solution for the set.

Select Solution Sets

Access the Administer Resource Optimization page.

Administer Resource Optimization

Run Control ID: OPTIMIZATION

[Process Request](#) [Process Monitor](#)

Use this page to manage the resource optimization process. Resource optimization determines the best way to match resources to resource requests given all available information. The results of this process are available on the Staffing Workbench and in the Resource Optimization report.

*Optimization Set ID		
US001-3		
JPN01		

Administer Resource Optimization page

Optimization Set ID Enter the solution sets to include in the run control.

Register and Create Solution Sets

Access the Process Scheduler Request page.

Process Scheduler Request

User ID: DVP1 **Run Control ID:** OPTIMIZATION

Server Name: **Run Date:**

Recurrence: **Run Time:** [Reset to Current Date/Time](#)

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	
☒	Register Optimization Set	RS_OPT_REG	Application Engine	Web	TXT	
☐	Unregister Optimization Set	RS_OPT_UNREG	Optimization Engine	Web	TXT	
☒	Create Optimal Solution Sets	RS_OPTIMIZE	Optimization Engine	Web	TXT	

Process Scheduler Request page

Select and run or schedule the processes for the optimization set IDs that are included in the run control.

Register Optimization Set Select to register the optimization set the first time that you create an optimal solution (run the Solve process) for the set.

Repeat this option for a set if the list of associated business units changes.

Unregister Optimization Set Select to delete all solution set data and unregister the optimization set IDs that are included in the run control.

Note. You can disable the Resource Optimization feature throughout the organization by running the Unregister process for all optimization set IDs.

Create Optimal Solution Sets

Select to create an optimal solution set for each optimization set that is included in the run control.

Note. Run this process regularly (for example, every 30 minutes) to ensure that the solution set reflects recent resource and resource request transactions. When deciding how often to run this process, base the decision on your business processes and environment—for example, the frequency with which you update resources and resource requests, and the computer resources that are available to run the process.

After the completion of the Solve process, the current optimal solution sets are available for use on the Staffing Workbench - Fulfill Orders page, where you can view the optimal resources for specific resource requests and fulfill resource requests based on the optimal solution set. You can also view a current optimal solution set in the Reports folder.

See Also

Chapter 23, “Fulfilling Service Orders,” Fulfilling Open Resource Requests, page 325

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Viewing Optimal Solution Sets

This section discusses how to view optimal solution sets.

Page Used to View Optimal Solution Sets

Page Name	Object Name	Navigation	Usage
Opt (Optimal) Solution Set	RS_OPT_ASSIGN_RPT	Resource Management, Reports, Resource Optimization, Opt (Optimal) Solution Set	View the most recent optimal solution set for a specified optimization set ID.

Viewing the Optimal Solution Set for a Specified Optimization Set ID

Access the Opt (Optimal) Solution Set page.

Opt Solution Set			
Business Units US001, US003			
Projected Utilization (%):	3.20	Average Fitness Score (%):	59.57
Projected Revenue:	744800.00	Currency Code:	USD
Number of Delayed Requests:	0		
Resource Request ID	EmplID	Name	
US001 / 0000000006 / 1	KU0022	Cornelia Turner	
US001 / 0000000007 / 1	KU0049	Tomas Sherwood	
US001 / 0000000008 / 1	KU0107	Karl Barnes	
US001 / 0000000010 / 1	KU0080	Nancy Emmerson	
US003 / 0000000006 / 1	KU0039	Petros Hemani	
US003 / 0000000007 / 1	KU0039	Petros Hemani	
US003 / 0000000014 / 1	KU0033	Elizabeth Schumacher	

Opt (Optimal) Solution Set (1 of 2)

Customize Find View All  First 1-7 of 7 Last			
Name	Resource Request Date Ranges	Qualifications Fit Score	Preferences Fit Score
Cornelia Turner	01 April 2004 - 30 April 2004	50%	25%
Tomas Sherwood	09 February 2004 - 31 March 2004	53%	33%
Karl Barnes	01 June 2004 - 31 August 2004	50%	50%
Nancy Emmerson	01 March 2004 - 30 June 2004	53%	33%
Petros Hemani	01 October 2004 - 31 January 2005	57%	50%
Petros Hemani	14 April 2004 - 30 April 2004	100%	50%
Elizabeth Schumacher	03 May 2004 - 30 September 2004	53%	30%

Opt (Optimal) Solution Set (2 of 2)

Enter an optimal solution set to view when you enter the report using the Resource Management Reports folder navigation.

Projected Utilization (%)

This value is calculated as the total number of hours projected to be assigned to the resources in the business units for the solution set divided by the total number of available hours for the same resources. Partial days are not considered.

For example, assume there are two service orders, each with five resource request lines. Six resources can be allocated to these two service orders. The earliest resource request start date is January 1, 2004, and the latest resource request end date is January 14, 2004. There is a three day lag time, so the latest end date is January 19, 2004. The total number of work days is thirteen. There are six resources. Therefore, the total number of days

for all resources is 78. However, two resources are not available from January 1 to January 5, and two resources are not available from January 8 to January 14. Therefore, the total number of unavailable days is 16 and the total number of available days for all resources is 62. Assume the number of days that are assigned for each resource are:

- KU0011: 2
- KU0022: 10
- KU0023: 10
- KU0062: 2
- KU0083: 10
- KU0087: 10

In this example the total number of days assigned is 44. The projected utilization is $44/62 = 0.71$ or 71 percent.

Average Fitness Score (%)	The sum of the fitness scores of all resource request and resource combinations divided by the number of these combinations.
Projected Revenue	The total revenue for all employees projected to be assigned to the service orders in the solution set.
Currency Code	The currency code for the projected revenue.
Number of Delayed Requests	The number of resource requests that have a proposed staffing solution with an assignment completion date after the due date specified on the resource request.
Resource Request ID	The business unit, service order ID, and resource request line ID.
EmplID	The resource recommended by the Resource Optimization for this request.
Name	The resource's name.
Resource Request Date Ranges	The start and end dates of the resource's assignment proposed by the Resource Optimization feature for a resource request. If Resource Optimization cannot find the contiguous assignment dates, it can propose multiple date ranges. For instance, the date ranges for a 10-day assignment recommendation can be January 12, 2004 to January 16, 2004, and January 26, 2004 to January 29, 2004.
Qualifications Fit Score and Preferences Fit Score	Fit scores for this resource from the Resource Match engine in PeopleSoft Resource Management.

CHAPTER 18

Maintaining Resource Profiles

This chapter provides an overview of resource profile maintenance and discusses how to:

- Maintain resource profiles.
- Modify resource competencies, interests, and accomplishments.

Understanding Resource Profile Maintenance

The resource profile captures an inventory of a resource's accomplishments, competencies, and preferences that are used by the Refresh Match Cache Application Engine process (RS_DF) to calculate the resource's fit scores for each open resource request. The profile also provides general employee data such as contact information, weekly work days, or assignment restrictions.

The foundation for a resource's profile is the employee or non-employee data (such as employee ID, name and contact information, competencies, and accomplishments) that is stored in the employee source database. Information about the resource that is specific to PeopleSoft Resource Management (such as flexible resource attribute values and work experience) is also maintained in the resource profile.

This section lists a prerequisite and discusses:

- Use of resource profiles.
- Resource profile design.

Prerequisite

You must establish employees and non-employees as resources in PeopleSoft Resource Management before you can work with their resource profiles.

See [Chapter 13, “Establishing Resources,” page 125](#).

Use of Resource Profiles

Resource profile maintenance is typically the responsibility of the resource manager and the resource. The unique security specifications for each PeopleSoft Resource Management user role determine whether a user can modify only the user's own profile or view and modify other resource profiles. You can control the list of roles that have permission to modify resource profiles.

This table lists the folder navigation paths that access the resource profile:

Navigation	Description
Resource Management, Maintain Resource Profiles, My Profile	Used by resources to view and modify their own profile information.
Resource Management, Maintain Resource Profiles, Profiles	Used by resource managers, or other users with appropriate access, to view and modify a resource's profile.
Resource Management, Maintain Resource Profiles, Review Profiles	Used by staffing coordinators, or other users with appropriate access, to review a resource's profile.

The appearance of the Resource Profile component depends on the navigation path that you choose and the resource profile display options that are established during implementation in the Profile Display Options group box on the Installation Options - Resource Management page. The resource profile that appears when you view your own profile is the profile associated with your user login. To access profile information for other resources, you can select the profile by looking up the resource's name or employee ID.

Resource Profile Design

Personal data, competency, and accomplishment information is maintained in the employee source database. If you integrate with PeopleSoft Human Resource Management (PeopleSoft HRMS) and you select a link to update competency or accomplishment information stored in the employee source database, you access the appropriate PeopleSoft HRMS pages through the Single Signon feature. The information in PeopleSoft Resource Management data tables is updated in near real time.

If the employee source database is PeopleSoft Resource Management, the competency and accomplishment records can be modified on the resource profile pages discussed in this chapter. You can modify other information on the resource profile that is maintained specifically for PeopleSoft Resource Management if your user ID is associated with a role that has the appropriate security access.

Competencies, Interests, and Accomplishments in PeopleSoft HRMS

If PeopleSoft HRMS is the source database for the Competencies and Interests region of a resource profile, an application message sends the data from PeopleSoft HRMS to the Financials and Supply Chain Management (FSCM) database. When you click a link to update a competency, interest, or accomplishment, you access the HRMS database using the Single Signon feature.

The competency information that appears on the resource profile may differ from the competency information on the resource's self-service Competency page in PeopleSoft HRMS. This occurs because the evaluation type (such as *Self* or *Manager*) that appears on the resource profile is determined during PeopleSoft Resource Management implementation on the Installation Options - Resource Management page. The evaluation type is used in the Resource Matching process.

When users select an update link from the resource profile, they access the self-service Competency Evaluation page in PeopleSoft HRMS. When managers update other user profiles, they access the manager's evaluation page in PeopleSoft HRMS. You can update and save competency data in the HRMS system and then return to the resource profile in PeopleSoft Resource Management. If the *Self* evaluation type is selected during implementation, the manager's evaluation information might be different from the information in the profile. Similarly, if the *Manager* evaluation type is selected, the self-evaluation might be different from the information in the profile.

Competencies, Interests, and Accomplishments in PeopleSoft Resource Management

If PeopleSoft Resource Management is the employee source database, select the Add/Update link for the Competencies and Interests region of a resource profile to access to the appropriate pages for updating this information in the FSCM database.

If Competency Change Notification workflow is enabled on the Installation Options - Resource Management page, the system sends an email notification to the resource manager (as defined in the Job record) when competencies and accomplishments are modified on the resource profile. This workflow applies only if you use the FSCM database as the employee source database for the resource.

Source Database Tables

This table contains the categories of information in the resource profile and discusses where the source data is maintained if you use PeopleSoft HRMS or PeopleSoft Resource Management as the employee source database.

If you use PeopleSoft HRMS as the employee source database, application messages send resource profile data from the HRMS database to the corresponding table in the FSCM database. Corresponding table names in the two databases may not be identical.

Resource Profile Category	If Employee Source Database is FSCM (PeopleSoft Resource Management 8.8)	If Employee Source Database is HRMS (PeopleSoft HRMS 8.3 or PeopleSoft HRMS 8.8)
<i>Objective:</i> A brief description summarizing the resource's work objectives and background.	Objective information is stored in the Objective field (WORKER_SUMMARY) on the PeopleSoft Resource Management Worker Table record (RS_WORKER_TBL).	Objective information is stored only in the FSCM database.
<i>Areas of specialty:</i> The competencies or competency categories that are a resource's strengths or areas of expertise.	Specialty values are stored in these FSCM database tables: - Resources' specialties are stored in the Worker Specialties record (RS_WRKR_SPECS). - Valid competency values are stored in the Competencies Table record (COMPETENCY_TBL). - Competency types are stored in the Competency Types record (RS_TYPE_TBL).	Specialty values are derived from these HRMS database tables: - Resources' specialties are stored only in the FSCM database. - Valid competency values are stored in the Competencies Table record (COMPETENCY_TBL). - Competency types are stored in the Competency Types record (CM_TYPE_TBL).

Resource Profile Category	If Employee Source Database is FSCM (PeopleSoft Resource Management 8.8)	If Employee Source Database is HRMS (PeopleSoft HRMS 8.3 or PeopleSoft HRMS 8.8)
<i>Work experience:</i> Any type of work that the resource has performed. It is updated automatically each time that a resource receives a new assignment. It can also be updated manually.	Work experience information is stored in the FSCM database in the Worker Table record (RS_WORK_HISTORY).	Work experience information is stored only in the FSCM database.
<i>Qualifications:</i> a resource's competencies and accomplishments.	Competencies and interests are stored in these FSCM database tables: - Resources' competencies are stored in the Person Competencies record (COMPETENCIES). - Valid competency values are stored in the Competencies Table record (COMPETENCY_TBL). - Resource evaluation types are stored in the Person Competency Evaluation record (RS_EVALUATIONS). - Review rating values are stored in the Review Ratings record (REVIEW_RATING_TBL). - Rating model values are stored in the Rating Model record (RATING_MDL_TBL). - Competency types are stored in the Competency Types record (RS_TYPE_TBL).	Competencies and interests are derived from these HRMS database tables: - Resources' competencies are stored in the Person Competencies record (COMPETENCIES). - Valid competency values are stored in the Competencies Table record (COMPETENCY_TBL). - Resource evaluation types are stored in the Person Competency Evaluation record (CM_EVALUATIONS). - Review rating values are stored in the Review Ratings record (REVIEW_RATING_TBL). - Rating model values are stored in the Rating Model record (RATING_MDL_TBL). PeopleSoft Resource Management displays the information from the Worker Competencies View record (RS_WRKR_COMP_VW). This view is restricted to show only the latest evaluations of competencies. The evaluation type that appears, such as <i>Self</i>, <i>Peer</i>, or <i>Supervisor/Manager</i>, is specified on the Installation Options - Resource Management page. Important! Do not include a rating for the same competency on more than one evaluation with the same effective date. For example, if you rate the Expertise competency on one self-evaluation, do not include the Expertise competency on a different self-evaluation for the same resource with the same effective date.

Resource Profile Category	If Employee Source Database is FSCM (PeopleSoft Resource Management 8.8)	If Employee Source Database is HRMS (PeopleSoft HRMS 8.3 or PeopleSoft HRMS 8.8)
	Values for education, licenses and certificates, language, professional memberships, honors and awards, and tests are stored in these FSCM database tables: - Resources' accomplishments are stored in the Person Accomplishments record (ACCOMPLISHMENTS). - Valid accomplishment values are stored in the Accomplishments Table record (ACCOMP_TBL).	Values for education, licenses and certificates, languages, memberships, honors and awards, and test results are derived from these HRMS database tables: - Resources' accomplishments are stored in the Person Accomplishments record (ACCOMPLISHMENTS). - Valid accomplishment values are stored in the Accomplishments Table record (ACCOMP_TBL).
<i>Preferences:</i> used to accommodate a resource's individual preferences for assignments, and can include flexible attributes that are defined by the organization.	Preferences are stored in these FSCM database fields and tables: - Maximum travel distance is stored in the Distance field (DISTANCE) in the Worker Table record (RS_WORKER_TBL). - Resources' preference attribute IDs and value IDs are stored in the Flexible Worker Preferences record (RS_WRKR_PREFS). - Resources' attribute preferences are stored in the Attributes record (RS_ATTRIBUTES). - Valid values for each resource preference attribute are stored in the Attribute Values record (RS_ATTRIB_VALS).	Preferences information is stored only in the FSCM database.

Resource Profile Category	If Employee Source Database is FSCM (PeopleSoft Resource Management 8.8)	If Employee Source Database is HRMS (PeopleSoft HRMS 8.3 or PeopleSoft HRMS 8.8)
<i>General information:</i> includes a resource's address, phone numbers, job information, passports and visas, weekly work days, home airport, assignment restrictions, resume attachments, and other resource attribute values.	Address and job information are stored in these FSCM database tables: • Resource names, addresses, and personnel status are stored in the Personal Data record (PERSONAL_DATA). • Name and address effective dating information is stored in the Effective Dated Personal Data record (PERS_DATA_EFFDT). • Job information is stored in the Job record (JOB). • Email addresses are stored in the Operator Definition record (PSOPRDEFN).	Address and job information are stored in these HRMS database tables: • Personnel status is stored in the Person Record (PERSON). This data is sent to the Personal Data record in the FSCM database. • Personnel status effective dating information is stored in the Effective Dated Personal Data record (PERS_DATA_EFFDT). • Resource names are stored in the Person Names record (NAMES). This data is sent to the Personal Data record and the Effective Dated Personal Data record in the FSCM database. • Addresses are stored in the Addresses record (ADDRESSES). This data is sent to the Personal Data record and the Effective Dated Personal Data record in the FSCM database. • Job information is stored in the Job Information record (JOB). General information that is stored in PeopleSoft HRMS must be maintained in PeopleSoft HRMS. These values cannot be updated directly in the resource profile.
	Passport and visa information are stored in these FSCM database tables: • Passport information is stored in the Passport record (CITIZEN_PSSPRT). • Visa information is stored in the Visa Data record (VISA_PMT_DATA).	Passport and visa information are derived from these HRMS database tables: • Passport information is stored in the Passport record (CITIZEN_PSSPRT). • Visa information is stored in the Visa Data record (VISA_PMT_DATA).
	Phone information is stored in the FSCM database in the Worker Phone record (RS_WRKR_PHONE).	Phone information that is used by PeopleSoft Resource Management is stored only in the FSCM database.
	Weekly work days, home airport, and assignment restrictions are stored in the FSCM database in the Worker Table record (RS_WORKER_TBL).	Weekly work days that are used by PeopleSoft Resource Management, home airport, and assignment restrictions are stored only in the FSCM database.

Resource Profile Category	If Employee Source Database is FSCM (PeopleSoft Resource Management 8.8)	If Employee Source Database is HRMS (PeopleSoft HRMS 8.3 or PeopleSoft HRMS 8.8)
	Resource qualifications can include flexible attributes defined by the organization. The following list describes the source data for each flexible resource qualification field: • The resource's qualification attribute ID and value ID are stored in the FSCM database in the Attribute ID and Value ID record (RS_WRKR_AT_VAL). • Valid values for each flexible resource qualification attribute are stored in the FSCM database in the Attribute Values record (RS_ATTRIB_VALS). • The flexible qualification attributes are stored in the FSCM database in the Attributes record (RS_ATTRIBUTES).	Flexible resource qualification information is stored only in the FSCM database.
	Resume document attachments are stored on the File Transfer Protocol file server. Information about the attachments, such as employee ID, description, and default resume flag, are stored in the PeopleSoft Resource Management Attachments record (RS_ATTACHMENTS).	Resume document attachments are stored on the File Transfer Protocol file server. Information about the attachments is stored only in the FSCM database.
<i>Resource profile (summary):</i> appears as a single, display-only page.	The regions that appear are selected on the Installation Options - Resource Management page during implementation.	not applicable

Maintaining Resource Profiles

The resource profile is a dynamic record designed for periodic review and update by the resource and resource manager to reflect changes in the resource's qualifications. You view or modify various parts of a resource's profile when you establish and maintain the resource.

This section discusses how to:

- Maintain resource objective and areas of specialty.
- Maintain resource work experience.
- Maintain resource qualifications.
- Maintain resource preferences.
- Maintain resource general information.

- Review the resource profile.

Pages Used to Maintain Resource Profiles

Page Name	Object Name	Navigation	Usage
Resource Profile - Overview	RS_ERES_OVERVW	• Resource Management, Maintain Resource Profiles, Profiles, Overview • Resource Management, Maintain Resource Profiles, My Profile, Overview	View or modify a resource's objective and areas of specialty.
Resource Profile - Work Experience	RS_ERES_WORK_HIST	Click Work Experience on any Resource Profile page.	View a resource's work experience information.
Work Experience (edit)	RS_WORK_HIST_EDIT	Click Add Work Experience or Edit on the Resource Profile - Work Experience page.	Add or modify a resource's work experience entries.
Resource Profile - Qualifications	RS_ERES_COMP_ACOMP	Click Qualifications on any Resource Profile page.	View or modify a resource's qualifications that are stored in the employee source database.
Resource Profile - Preferences	RS_ERES_PREFS	Click Preferences on any Resource Profile page.	View or modify resource preference information.
Resource Profile - General Info (resource profile - general information)	RS_ERES_GEN_INFO	Click General Info on any Resource Profile page.	View or modify a resource's contact information, job, passports and visas, weekly work days, home airport, assignment restrictions, and flexible resource attribute values.
Resource Profile - <Resource>	RS_RES_PROF_RVW	• Resource Management, Maintain Resource Profiles, Review Profiles, <Resource> • Click Resource Profile on any Resource Profile page.	Review consolidated resource profile information in a resume format.
<Resource> Contact Information	RS_RES_PROF_CONTCT	Click Contact Information on the Resource Profile - <Resource> page.	Review a resource's address and telephone information.

Maintaining Resource Objective and Areas of Specialty

Access the Resource Profile - Overview page.

Overview
Work Experience
Qualifications
Preferences
General Info
Resource Profile

Scooter Evans

Employee ID: RS00000006 **Supervisor:** George Lane
Department: Sales and Services **Location:** USA - California
Job Code: Senior Consultant **Personnel Status:** Non-Empl **Person Type:**

Objective Overview

Please write a brief description summarizing work objectives and background. References to skills, preferences, strengths, experience, etc. may be included, but note that this information is captured in detail elsewhere.

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Resource Profile - Overview page (1 of 2)

Areas of Specialty

Select the competencies or competency categories that identify areas of specialty. Pick specialties from the tree or add them directly to the list. Click "Save" when you are finished.

Select Specialties

Left | Right

+ CORP - Corporate

Specialties			
Type of Specialty	Worker Specialty	Description	
Competency	2003	Programming	Delete
Competency	5017	Application Server Admin	Delete
Category	TECH	Technical	Delete

Add Specialty

Save

Resource Profile - Overview page (1 of 2)

Note. Data that is captured on this page is for information only and is not used by the Resource Matching process.

Objective Overview

Enter a summary of work objectives and background that a staffing coordinator can use when considering the resource for an assignment.

Select Specialties

Enter specialties from the Competency tree that reflect relevant professional expertise. Specialties provide a means to highlight primary skills. Many resources have a long list of competencies ranging from technical to interpersonal skills; specialties, however, focus attention on core competencies.

If you select a node, the specialty appears in the grid with the specialty type value *Category*. If you select a detail value, the specialty appears with the specialty type value *Competency*.

Note. You can select specialties from the tree or click the Look up Worker Specialty icon.

Type of Specialty

Enter a type. Options are:

Competency: Specialties of this type represent specific competencies that the resource possesses, such as strategic planning or project management experience.

Category: Specialties of this type represent a broad area of competency, such as managerial experience.

Worker Specialty

Enter the individual competency or category of competency that the resource possesses.

Delete

Click to delete the competency or category from the resource profile.

Add Specialty

Click to add additional competencies or categories as specialties.

Maintaining Resource Work Experience

Access the Resource Profile - Work Experience page.

The screenshot displays the 'Work Experience' tab of a resource profile for 'Scooter Evans'. It includes a table with two entries of work experience, each with 'Edit' and 'Delete' buttons. A 'Customize' link and pagination controls are also visible.

Start Date	End Date	Customer Name	Work Title		
10/06/2003	11/14/2003	Colorado Bike Mfg & Outdoor 8	Manage Project	Edit	Delete
01/06/2003	06/30/2003	Consolidated Business	Lead tech team	Edit	Delete

Below the table is an 'Add Work Experience' button.

Resource Profile - Work Experience page

Note. The Work Description field on the Resource Profile - Work Experience page is used by the Resource Match engine to calculate Work Experience factor fit scores.

A resource's past, present, and future work assignments appear on the page. A work experience entry is automatically added to the page each time the resource placed on an assignment in the status *Assigned* or *Pending Approval* in PeopleSoft Resource Management. You can modify or enhance the entry for further clarity.

If a resource's assignment is canceled before the start date, the work experience entry is automatically deleted from this page. If the assignment is canceled after the start date but before the assignment end date, the work experience end date automatically changes to the assignment cancellation date.

You can manually create work experience entries to record previous work experience that occurs at another company or before implementing PeopleSoft Resource Management.

Start Date and End Date	Displays past, current, or future assignment dates.
Customer Name and Work Title	Displays the customer and description for the assignment.
Edit	Click to modify the work experience line.
Add Work Experience	Click to add a work experience line to include any work experience that is not initiated in PeopleSoft Resource Management. Work experience that you add here does not appear on the resource schedule, but it is used by the Resource Matching process and can be reviewed by a user who evaluates candidates.

Work Experience Update

Access the Resource Profile - Work Experience edit page.

Work Experience

Scooter Evans

Enter or update information in any editable field. Press the "Save" button at the bottom of the page when you are finished filling out the form.

Work Information

***Start Date:**  (example: 12/31/2000)

End Date:  (example: 12/31/2000)

Customer Name 

***Work Title:**

Work Description:

Resource Profile - Work Experience edit page

Work Information	Enter new or update existing work experience information.
Save	Click to save the entry. On the Save Confirmation page, click OK to return to the Resource Profile - Work Experience page.

Maintaining Resource Qualifications

Access the Resource Profile - Qualifications page.

Overview
Work Experience
Qualifications
Preferences
General Info

Scooter Evans

Below is a list of competencies and accomplishments. Use the update links to edit, delete, or add information to the profile. Changes made to competencies and accomplishments may require re-accessing this page after a few moments to display updates.

Competencies and Interests	Customize Find View All First 1-4 of 4 Last			
Competency	Year Acquired	Year Last Used	Years of Work Experience	Rating
DB2	1999		3.0	5-Expert
Database Design	2000		3.0	4-Very Good
Systems Analysis	1996		6.0	3-Good
Web Server Administration	1999		3.0	2-Fair

[Add/Update Competencies and Interests](#)

Education		
Degree	Issue Date	Major
Bachelor of Engineering	05/18/1996	Electrical Engineering
Master of Civil Engineering	05/31/2000	Mechanical Engineering

[Add/Update Education](#)

Resource Profile - Qualifications page (1 of 3)

Licenses and Certificates			
License/Certificate	Expiration Date	Country	State

[Add/Update Licenses and Certificates](#)

Languages			
Language	Speaking Proficiency	Reading Proficiency	Writing Proficiency

[Add/Update Languages](#)

Professional Memberships		
Organization	Mandate	Mandate Position
Association for Systems Mgmt	PRESIDENT	PRESIDENT
Materials Management Society		

[Add/Update Professional Memberships](#)

Resource Profile - Qualifications page (2 of 3)

Honors and Awards		
Honor or Award	Grantor	Issue Date
Dean's Award	Stanford Univ	02/01/2000

[Add/Update Honors and Awards](#)

Test Results			
Test	Issue Date	Test Score	Passed Test
			☐

[Add/Update Test Results](#)

Resource Profile - Qualifications page (3 of 3)

Use this page to view qualifications or access pages to update the information.

Updating Information in PeopleSoft HRMS

If PeopleSoft HRMS is the employee source database, click the Add/Update link in a competency, interest, or accomplishment region to access PeopleSoft HRMS in a new browser window through the Single Signon feature. There, you can make modifications, save your changes, and then return to the resource profile in PeopleSoft Resource Management.

The competency information that appears in the resource profile may differ from the competency information in the resource’s self-service version of the Competency Evaluation pages in PeopleSoft HRMS. This occurs because the organization can determine which competency evaluation type appears in the resource profile and is used by the Resource Match engine. The resource profile shows only the latest competency evaluation. The evaluation shown depends on the option that is selected on the Installation Options - Resource Management page, which specifies the type of evaluation to use, such as *Self* or *Manager/Supervisor*. If the organization uses an evaluation type other than *Self* for the resource profile and the Resource Matching process, the competency information displayed on the resource profile may not match the resource’s self-evaluation in PeopleSoft HRMS. Any changes to the self-evaluation are not reflected in the resource profile.

Updating Information in PeopleSoft Resource Management

If PeopleSoft Resource Management is the employee source database, click the Add/Update link to access the PeopleSoft Resource Management pages that you use to modify resource competencies, interests, and accomplishments. This topic is discussed in more detail later in this chapter.

See [Chapter 18, “Maintaining Resource Profiles,” Modifying Resource Competencies, Interests, and Accomplishments, page 231.](#)

Maintaining Resource Preferences

Access the Resource Profile - Preferences page.

OverviewWork ExperienceQualificationsPreferencesGeneral Info

Scooter Evans

Specify preferences for the attributes listed below. Press "Save" when you are finished filling out the form.

Maximum Travel Distance

Maximum Travel:

350

Kilometers

Miles

Dress Code

Bus Casual	Q	BUSINESS CASUAL	4-Very desirable	Delete
Casual	Q	CASUAL DRESS	4-Very desirable	Delete
Formal	Q	FORMAL	0-Very undesirable	Delete

Add

Resource Profile - Preferences page

Maximum Travel Distance, Kilometers, and Miles

Enter the distance that the resource prefers not to exceed when traveling to an assignment, and select the unit of measure.

Maximum travel distance is for information only. It is not used by the Resource Matching process or any other PeopleSoft Resource Management processes.

If the organization establishes a flexible preference attribute, it appears on this page for the resource to specify values and preference levels. For example, if there is a flexible preference attribute called Work Region, the resource can specify a level of desire to work in each of the various regions.

<Flexible Preference Attribute>

Enter values that represent preferences for each attribute, and enter the preference levels.

Note. The preference level values are defined on the interest rating model (*INT*) during implementation. The Resource Matching process uses the interest rating model values to calculate the Flexible Preference factor. An administrator can modify the Interest rating model values as required. If you integrate with PeopleSoft HRMS, rating models are maintained in the HRMS database. If you use the FSCM database as the employee source database, rating models are maintained in PeopleSoft Resource Management.

See Chapter 9, “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” Establishing Application Setup Tables for Competencies, page 90.

See *PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*.

Add

Click to add flexible preference attribute values.

Maintaining Resource General Information

Access the Resource Profile - General Info page.

Overview

Work Experience

Qualifications

Preferences

General Info

Scooter Evans

Enter or update information in any editable field. Press the "Save" button at the bottom of the page when you are finished filling out the form.

Address

Address 1:

2895 Canyon View Place

Address 2:

Apt 3467

Address 3:

Address 4:

City/Twn1:

Las Vegas

Cnty/Twn2:

St/Prov:

NV

Postal:

56980

Country:

USA

☐ In City Limit

Email Address:

people@peoplesoft.com

Resource Profile - General Info page (1 of 3)

Phone

List contact phone numbers below. Add a row for each phone number. Specify the type of phone number and indicate the time periods when the phone number is valid. Describe any additional instructions for the phone number in the notes field as necessary.

*Phone Type	*Phone	Weekdays	Evenings	Weekends	Notes	
Business	219/555-7892	☒	☐	☐		Delete
Pager	219/555-8956	☒	☒	☒		Delete
Add Phone (example: 888/555-1212)						

Job Information

Job	Department	Location
Senior Consultant	Sales and Services	USA - California

Passports and Visas

Passport/Visa	Country	Number	Expiration Date
Passport	USA	US395967	

Weekly Work Days

Check the appropriate boxes to indicate days available to work.

☒ Monday
 ☒ Tuesday
 ☒ Wednesday
 ☒ Thursday
 ☐ Friday
☐ Sunday
 ☐ Saturday

Resource Profile - General Info page (2 of 3)

Other

Home Airport:	LAS VEGAS
Assignment Restrictions:	Works 4/10 work week Up Down
Industry	Education Search Education
Region	West Search Western Region

Resume Attachment

This section is used to add, view, and delete Resume attachments. When attaching Resumes into the system, you are required to select one Resume as your default Resume.

Resource Profile - General Info page (3 of 3)

You cannot modify address, job information, or passport and visa information on this page. You must update the information in the employee source database tables. For example, if the employee source database is PeopleSoft Resource Management, you can update this information using the Personal Data component (RS_CM_PERSONAL).

Address

Address <n>, City/Twn1
(city/town1), **Cnty/Twn2**
(county/town2), **St/Prov**
(state/province), **Postal,**
Country, and **In City Limit**

Review the street and postal address.

Email Address

Review the email address for the primary email account of the user ID that is associated with this resource. This is used when the system notifies the resource of date or status changes on assignments.

Phone

Phone Type and **Phone**

Enter a phone type and contact phone number.

Weekdays, Evenings,
and **Weekends**

Enter the times when the resource can be reached.

Job Information

Job

Review the job title as defined in the employee's Job record (JOB). If the resource has multiple jobs, the job that is specified for use in PeopleSoft Resource Management appears.

Department

Review the department that is defined in the Job record.

Location

Review the organization's location with which the resource is affiliated, as defined in the Job record.

Passports and Visas

Passport/Visa

Review passports or visas held by the resource as defined in the employee source database.

Weekly Work Days

Weekly Work Days

Select the appropriate check boxes to indicate the days of the week that the resource is available to work.

Weekly work days are used to determine a resource's available work days for assignments and appointments. The resource schedule indicates the work days with shading for the days that are not available.

Other

Home Airport

Enter the name of the preferred home airport (for information only).

Assignment Restrictions Enter any special restrictions or requirements, such as wheel chair access (for information only).

If the organization established a flexible resource attribute, either for use as a flexible qualification factor or for information only, it appears on this page. For example, if there is a flexible attribute called Industry, you can specify the industry expertise.

<Flexible Resource Attribute> Enter or look up the appropriate value for each attribute.

Add Click to add flexible attribute values, if the attribute allows multiple values.

Resume Attachment

File Name Click the link to open the resume document attachment for the resource.

Add Resume Click to access a search page and add a new resume attachment.

Browse Click to browse through directories and locate the appropriate resume document. Highlight the document and click Open to populate the attachment box with the document directory path.

Upload Click to upload the selected document to the resource profile.

Default Designates the default resume document. If there are multiple resume documents, specify the default for use by the Resource Matching process.

Delete Click to remove the resume document attachment from the resource profile.

Reviewing Resource Profiles

Access the Resource Profile - <Resource> page.

Work Experience

Qualifications

Preferences

General Info

Resource Profile

Scooter Evans

Employee ID: RS000000006

Supervisor: George Lane

Department: Sales and Services

Location: USA - California

Job Code: Senior Consultant

Personnel Status: Non-Empl

Person Type:

[people@peoplesoft.com](#)
[Contact Information](#)

Objective

PROVIDE EXPERTISE TO CORPORATIONS IMPLEMENTING PEOPLESFT INTERNET APPLICATIONS

Areas of Specialty

Technical, Application Server Admin, Programming

Work Experience

Find

View All

First

1-2 of 2

Last

10/06/2003 - 11/14/2003	Manage Project
No service order line comments.	
01/06/2003 - 06/30/2003	Lead tech team
No service order line comments.	

Competencies and Interests

DB2, Database Design, Systems Analysis, Web Server Administration

[View Detail](#)

Resource Profile - <Resource> page (1 of 2)

Accomplishments			
Education:	United States, Bachelor of Engineering - Electrical Engineering, 1996-05-18		
	United States, Master of Civil Engineering - Mechanical Engineering, 2000-05-31		
Memberships:	Association for Systems Mgmt, Materials Management Society		
Honors and Awards:	Dean's Award		
View Detail			
Preferences			
Dress Code:	BUSINESS CASUAL (4-Very desirable), CASUAL DRESS (4-Very desirable), FORMAL (0-Very undesirable)		
Maximum Travel Distance (miles):	350		
Passports and Visas			
Passport/Visa	Country	Number	Expiration Date
Passport	USA	US395967	
Other			
Industry:	Education		
Region:	Western Region		
Assignment Restrictions:	Works 4/10 work week		
Home Airport:	LAS VEGAS		

Resource Profile - <Resource> page (2 of 2)

This page consolidates the resource profile sections into a single, display-only format. A region appears on this page if the following two conditions are true:

- It is selected during implementation to appear on the Resource Profile display-only summary page.
- It contains data for the resource.

Contact Information

Click to access the <Resource> Contact Information page to review address and telephone information from the Resource Profile - General Info page. Click OK to return to the Resource Profile - <Resource> page.

View Detail and View Summary

Click View Detail in the Competencies and Interests or Accomplishments group boxes to view the qualification details. Click View Summary to return to the summary view.

Modifying Resource Competencies, Interests, and Accomplishments

If PeopleSoft Resource Management is the employee source database for the resource, you maintain the resource's competencies, interests, and accomplishments in the FSCM database. The values that are available to select on the pages in this section are derived from the competency and accomplishment tables that are set up during PeopleSoft Resource Management implementation.

This section discusses how to:

- Modify resource competencies and interests.
- Modify resource education.
- Modify resource licenses and certificates.
- Modify resource languages.
- Modify resource professional memberships.
- Modify resources honors and awards.
- Modify resource test results.
- Review updated resource qualifications.

Note. If PeopleSoft HRMS is the employee source database for the resource, when you modify the resource's competencies, interests, and accomplishments in the resource profile, you are transferred to PeopleSoft HRMS in a new browser window. After you modify qualification information that is stored in the HRMS database and close the new browser window to return to the resource profile, your changes may not be visible until you refresh the Resource Profile component (RS_WRKR_PROFILE).

Pages Used to Modify Resource Competencies, Interests, and Accomplishments

Page Name	Object Name	Navigation	Usage
Competencies	RS_CM_COMPTNCY	- Resource Management, Maintain Resource Profiles, Profiles Select the Qualifications tab on any Resource Profile page. Click Add/Update Competencies and Interests on the Resource Profile - Qualifications page. - Resource Management, Maintain Resource Profiles, My Profile Select the Qualifications tab. Click Add/Update Competencies and Interests on the Resource Profile - Qualifications page.	Modify a resource's competencies and interests.
Education	RS_CM_EDU	Click Add/Update Education on the Resource Profile - Qualifications page.	Review a resource's education information.
Education - Education Detail	RS_CM_EDU_DET	- Click a degree name on the Education page. - Click Add a Degree on the Education page.	View or modify a resource's education information.
Licenses and Certificates	RS_CM_LIC_CERT	Click Add/Update Licenses and Certificates on the Resource Profile - Qualifications page.	Modify a resource's license and certificate information.
Languages	RS_CM_LANG	Click Add/Update Languages on the Resource Profile - Qualifications page.	Modify a resource's language information.
Professional Memberships	RS_CM_MEMBR	Click Add/Update Professional Memberships link on the Resource Profile - Qualifications page.	Modify a resource's membership information.
Honors and Awards	RS_CM_HNR_AWRDS	Click Add/Update Honors and Awards on the Resource Profile - Qualifications page.	Modify a resource's honors and awards.

Page Name	Object Name	Navigation	Usage
Test Results	RS_CM_TEST_RSLT	Click Add/Update Test Results on the Resource Profile - Qualifications page.	Update a resource's test information.

Modifying Resource Competencies and Interests

Access the Competencies page.

Competencies
Scooter Evans
Employee ID: RS00000006

Select the competencies below that you would like the resource to have in their skill set.

Search for Competencies

Search for competencies by entering the competency description in the box below, and then clicking on the 'Search' button. Once you have selected the appropriate competency/competencies, click on the 'select' button and move the competencies to the grid.

Competency Description:

[Search by Category](#)

Select	Competency
☐	Database Design
☒	Object Oriented Design

Competencies									
	*Competency	Description	*Proficiency	Interest Level	Year Acquired	Year Last Used	Years of Work Experience		
1	2023	DB2	5-Expert	4-Very desirable	1999		3 Years	+	-
2	2006	Database Design	4-Very Good	3-Desirable	2000		3 Years	+	-
3	2004	Systems Analysis	3-Good	3-Desirable	1996		6 Years	+	-
4	5016	Web Server Administration	2-Fair	1-Undesirable	1999		3 Years	+	-

[Return to Qualification Profile](#)

Competencies page

Note. Competencies are used by the Resource Match engine.

Use the Basic Search page to search for a competency by key word or letters. Add, delete, or modify competencies and interests as required.

Search for Competencies

Competency Description	Enter characters from the competency description. For example, <i>World Banking</i> can appear as a search result if you enter <i>Bank</i> .
Search	Click to view a list of competencies that match the description.
Select (check box)	Select check boxes corresponding to the appropriate competencies.
Select (button)	Click to move the competencies to the Competencies grid.

Click Search by Category to access the Competency tree (COMPETENCY) and select competencies from competency categories. Expand the nodes as needed to find the desired competency. Click a competency to add it to the Competencies grid.

Competencies

Enter competencies' corresponding proficiency and interest level values. Enter relevant information regarding the year the competency was acquired or last used, or enter the total number of years that the resource spent using the competency.

Proficiency

Select the degree to which the resource is proficient in the competency.

The PeopleSoft Competency Management Scale rating model (PSCM) uses the following scale: *5-Expert, 4-Very Good, 3-Good, 2-Fair, 1-Little*, and *0-None*. However, you can establish a proficiency rating scale for every competency.

Interest Level

Select the resource's level of interest in the competency.

The Interest rating model (*INT*) (which the Resource Match engine uses) has the following scale: *4-Very Desirable, 3-Desirable, 2-No Preference, 1-Undesirable*, and *0-Very Undesirable*.

Years of Work Experience

Select the number of years of experience that the resource possesses for this competency. You can select from no years to 9+ Years.

Save the page and click Return to Qualification Profile to return to the Resource Profile - Qualifications page.

If you are managing the resource's competencies in PeopleSoft HRMS, save the page and close the browser window to return to the resource profile.

Modifying Resource Education

Access the Education page.

Education

Scooter Evans
Employee ID: RS00000006

Degree	School	Date Acquired		
Bachelor of Engineering	Stanford University	05/18/1996	Edit	Delete
Master of Civil Engineering	Berkeley, University of CA	05/31/2000	Edit	Delete

Add a Degree

[Return to Qualification Profile](#)

Education page

Note. Education information is used in the Resource Matching process.

Degree	Click a degree name to access the Education Detail page to view degree information.
Edit	Click to access the Education Detail page for the corresponding row and view or modify the degree information for this resource.
Delete	Click to immediately delete the corresponding degree row.
Add a Degree	Click to access the Education Detail page to add a degree for this resource.
Return to Qualification Profile	Click to return to the resource profile.

Education Detail

Access the Education - Education Detail page.

Education

Education Detail

Scooter Evans

Employee ID: RS000000006

*Degree:

Bachelor of Engineering

Major:

Electrical Engineering

Country:

USA

School:

Stanford University

Has this degree been completed?

Yes

Date Acquired:

05/18/1996

(example: 12/31/2000)

Save

* Required Field

[Return to Education](#)

Education - Education Detail page

Enter fields as appropriate and click Save to return to the Education page. Click Return to Education to discard your changes and return to the Education page.

Modifying Resource Licenses and Certificates

Access the Licenses and Certificates page.

Licenses and Certificates										
Scooter Evans						Employee ID: RS00000006				
	*License/Certificate	Description	Issue Date	Expiration Date	License/Certification Number	Issued By	Country	State	Renewal in Progress	
1	CIRM	Integrated Resource Management	11/07/2003	11/30/2008	TX4489958	APICS	USA	VA	☐	

[Return to Qualification Profile](#)

Licenses and Certificates page

Note. License and certificate information is used by the Resource Match engine.

Enter the appropriate field values and save the page. Click Return to Qualification Profile to return to the Resource Profile - Qualifications page.

If you are managing the resource's accomplishments in PeopleSoft HRMS, save the page and close the browser window to return to the resource profile.

Modifying Resource Languages

Access the Languages page.

Languages									
Scooter Evans						Employee ID: RS00000006			
*Language	Native	Translator	Teacher	Speak	Read	Write	Evaluation Date		
GE	German	☐	☒	☐	High	Moderate	Moderate	8/30/2003	

[Return to Qualification Profile](#)

Languages page

Note. Language information is used by the Resource Match engine.

Enter the appropriate field values and save the page. Click Return to Qualification Profile to return to the Resource Profile - Qualifications page.

If you are managing the resource's accomplishments in PeopleSoft HRMS, save the page and close the browser window to return to the resource profile.

Modifying Resource Professional Memberships

Access the Professional Memberships page.

Professional Memberships

Scooter Evans Employee ID: RS00000006

Professional Membership Detail			Customize Find				First	1-2 of 2		Last
*Organization	Description	Membership Date	Mandate	Mandate Position	Mandate Begin Date	Mandate End Date				
ASM	Association for Systems Mgmt	01/01/2000	PRESIDENT	PRESIDENT	01/01/2003	06/30/2004	+	-		
MMS	Materials Management Society	05/31/2000					+	-		

[Return to Qualification Profile](#)

Professional Memberships page

Note. Professional membership information is used by the Resource Match engine.

Mandate Enter or modify the authorized mission or goals of the member organization.

Mandate Position Enter or modify the resource's role or authorized mission in the organization.

Enter the appropriate field values and save the page. Click Return to Qualification Profile to return to the Resource Profile - Qualifications page.

If you are managing the resource's accomplishments in PeopleSoft HRMS, save the page and close the browser window to return to the resource profile.

Modifying Resource Honors and Awards

Access the Honors and Awards page.

Honors and Awards

Scooter Evans Employee ID: RS00000006

Honors and Awards		Customize Find			First	1 of 1		Last
	*Honor or Award	Description	Presented By	Issue Date				
1	DEA	Dean's Award	Stanford Univ	02/01/2000	+	-		

[Return to Qualification Profile](#)

Honors and Awards page

Note. Honors and awards history is for information only; it is not used by the Resource Matching process.

Enter the appropriate field values and save the page. Click Return to Qualification Profile to return to the Resource Profile - Qualifications page.

If you are managing the resource's accomplishments in PeopleSoft HRMS, save the page and close the browser window to return to the resource profile.

Modifying Resource Test Results

Access the Test Results page.

Test Results

Scooter Evans

Employee ID: RS000000006

Test Results		Customize	Find	First 1 of 1 Last	
*Test	Description	Test Date	Test Score	Passed Test	
1 1011	Language Translation	09/10/1998	98.00	☒	

[Return to Qualification Profile](#)

Test Results page

Note. Test results are for information only and are not used by the Resource Matching process.

Enter the appropriate field values and save the page. Click Return to Qualification Profile to return to the Resource Profile - Qualifications page.

Note. If you are managing the resource's accomplishments in PeopleSoft HRMS, the Add/Update Test Results link does not appear on the Resource Profile - Qualifications page. You can view—not update—resource test results in the resource profile. Use the PeopleSoft HRMS system to update test results.

See “Tracking Employee Competencies and Accomplishments” in the *PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*.

CHAPTER 19

Maintaining Resource Schedules

This chapter provides an overview of resource schedule maintenance and discusses how to work with resource schedules.

Understanding Resource Schedule Maintenance

Resource schedule maintenance is an essential part of effectively managing resources in PeopleSoft Resource Management. PeopleSoft Resource Management uses the resource schedule to interactively manage a resource's scheduled tasks and availability. The Resource Match engine uses schedule data to calculate the availability of each resource and compare it to the dates specified on a resource request.

Resource schedules appear in a simple calendar format for use by resources, managers, staffing coordinators, and other members of the organization who need to view or update schedules. You can view the current month and year or navigate to previous or future months and years. You can also drill down to a weekly or daily view of the schedule.

During implementation on the Installation Options - Resource Management page, you can specify which nonassignment task categories trigger a notification message to the resource and the resource manager if a manager with authority to modify resource schedules changes a task in the specified category in the resource schedule. You can also specify which nonassignment task categories trigger a notification message to the resource manager if a resource changes a task in the specified category.

This section lists prerequisites and discusses:

- Task categories
- Assignments and appointments
- Third-party calendar synchronization
- Holidays
- Notification messages

Prerequisites

Before you work with resource schedules, you must:

- Define resource schedule options.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Setting Up PeopleSoft Resource Management Installation Options.

- Define task categories.

See [Chapter 14, “Enabling Resource Schedules,” Defining Task Categories and Mapping to TRCs, page 144.](#)

- Set up external calendar integration options if you integrate PeopleSoft Resource Management with a third-party calendar application.

See [Chapter 11, “Integrating PeopleSoft Resource Management with Other Applications,” Understanding Integration with Third-Party Desktop Calendar Applications, page 119.](#)

- Define holidays.

See [Chapter 14, “Enabling Resource Schedules,” Defining Holidays on Resource Schedules, page 146.](#)

- Establish eligible resources.

See [Chapter 13, “Establishing Resources,” page 125.](#)

Task Categories

Every entry in a resource schedule is associated with a task category. Task categories are used in the Resource Match engine and in PeopleSoft Resource Management reports. Most of the task categories are predefined in PeopleSoft Resource Management; however, an organization can define additional task categories that are specific to its business needs.

The task categories are:

- *Billable External*: Select to designate a billable, external (customer) assignment for the resource.
- *Billable Internal*: Select to designate a billable, internal (company or agency) assignment for the resource.
- *Corporate Event*: Select to schedule the resource to attend a company or agency event.
- *Education-College/Univ*: Select to schedule the resource to participate in educational course work.
- *Company Holiday*: Select to designate organization holidays that are defined in the Holiday Date record (HOLIDAY_DATE).
- *Planned Leave*: Select to schedule a resource’s planned leave.
- *Meeting*: Select to schedule the resource to attend a meeting.
- *Nonbillable External*: Select to designate a nonbillable, external (customer) assignment for the resource.
- *Nonbillable Internal*: Select to designate a nonbillable, internal (company or agency) assignment for the resource.
- *Personal Time Off*: Select to schedule a resource for personal time off.
- *Corporate Training*: Select to schedule the resource to train for an assignment.
- *Vacation*: Select to schedule a resource’s vacation.

You can define additional task categories during PeopleSoft Resource Management implementation.

Each task category has a basic flexibility percentage that indicates the degree to which the task is a firm commitment or can be rescheduled. Assignment task categories also have a reserved status flexibility percentage that overrides the basic flexibility percentage if the task has the status *Reserved*. The Resource Matching feature evaluates the flexibility of the task category associated with appointments or assignments on a resource schedule when determining resource availability.

Task category codes, descriptions, and flexibility percentages are discussed in more detail in the chapter on enabling resource schedules.

See Also

[Chapter 14, “Enabling Resource Schedules,” Task Categories, page 141](#)

Assignments and Appointments

Resource schedule entries are classified as appointments or assignments, which have the following characteristics:

- *Appointments* consist of meetings, corporate events, training and education, and any scheduled time away from work.

You can enter appointments into a resource schedule manually, or you can add them from a third-party calendar application using a synchronization process.

- *Assignments* consist of work that employees perform at a billable or nonbillable rate for internal or external customers.

You add assignments to resource schedules by running the PeopleSoft Resource Management assignment processes.

Calendar Synchronization

You can integrate PeopleSoft Resource Management schedules with Microsoft Exchange and Outlook or Lotus Domino and Notes third-party calendar applications. The Calendar Synchronization Application Engine process (RS_CALSYNC) updates the resource schedule with appointments from the desktop calendar, and the resource schedule also updates the desktop calendar. For example, a PeopleSoft Resource Management assignment on the resource schedule is added to the Lotus Notes network calendar during the Calendar Synchronization process. Depending on the synchronization options that you define at implementation, resources can submit a Calendar Synchronization process request directly from the monthly schedule. The system can refresh the specified resource schedules, or all resource schedules, on a processing cycle that you establish using PeopleSoft Process Scheduler.

Holidays

An organization defines its holidays in the employee source database. You can establish a single holiday calendar for the organization or different holiday calendars for each country. If changes are made to a holiday calendar that is associated with a resource, the changes are automatically applied to the resource's schedule. In addition, resources can refresh holidays on their schedules by initiating the Holiday Load Application Engine process (RS_HOLIDAY) directly from the monthly schedule.

Notification Messages

During PeopleSoft Resource Management implementation, you can set up workflow to trigger notifications when certain changes are made to the resource schedule. The workflow is triggered based on the task category of a new or modified appointment and the role of the user who makes the change. When schedule workflow is activated for a task category, any new appointments or changes to existing appointments in that task category automatically trigger a notification message to the resource or resource manager.

Working with Resource Schedules

The resource schedules that you can view or modify are based on your user role. When you navigate to the My Monthly Schedule folder, the schedule that appears is associated with your user login. If you have access to other resource schedules, you can navigate to the Monthly Schedules folder option and select a resource schedule to view or modify.

This section discusses how to:

- View or modify a resource schedule.
- Maintain holidays and third-party calendars.

Pages Used to Work with Resource Schedules

Page Name	Object Name	Navigation	Usage
Monthly Schedule	RS_SCHED_MONTH	• Resource Management, Maintain Schedules, Monthly Schedules, Monthly Schedule • Resource Management, Maintain Schedules, My Monthly Schedule, Monthly Schedule • Click View Monthly Schedule on the Assign Resource page. •  Click the View monthly calendar icon for a resource in the Search Results or Considering grid on the Express Search page (RS_EXPRESS_SEARCH). •  Click the Monthly Calendar icon for a resource on the Staffing Workbench.	View and modify your monthly schedule or the monthly schedule of resources, based on the security access of your user role.
Daily Schedule	RS_SCHED_DAILY	Click the day of the month link on the Monthly Schedule page if an appointment or assignment occurs on that day. (If there are no schedule entries on that day, the day of the month link accesses the Appointment Details page.)	View the resource's daily schedule in hourly increments.
Weekly Schedule	RS_SCHED_WEEKWIDE	Click This week on the Daily Schedule page.	View the resource's weekly schedule.

Viewing or Modifying Resource Schedules

This section discusses how to view or modify a resource's appointments or assignments from the:

- Monthly schedule
- Daily schedule
- Weekly schedule

Monthly Schedule

Access the Monthly Schedule page.

Monthly Schedule

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November		2003	This month			
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27 8:00a Manage Project	28 8:00a Manage Project	29 8:00a Manage Project	30 8:00a Manage Project 1:30p Weekly Staff Meeting	31	1
2	3 8:00a Manage Project	4 8:00a Manage Project	5 8:00a Manage Project	6 8:00a Manage Project 1:30p Weekly Staff Meeting	7	8
9	10 8:00a Manage Project	11 8:00a Manage Project	12 8:00a Manage Project	13 8:00a Manage Project 1:30p Weekly Staff Meeting	14	15
16	17	18	19	20 1:30p Weekly Staff Meeting	21	22
23	24 0:00a Vacation	25 0:00a Vacation	26 0:00a Vacation	27 0:00a Holiday 1:30p Weekly Staff Meeting	28	29
30	1	2	3	4 1:30p Weekly Staff Meeting	5	6

Synchronize Calendar
Update Employee's Holidays

Monthly Schedule page

The first two schedule entries for each day appear on the page.

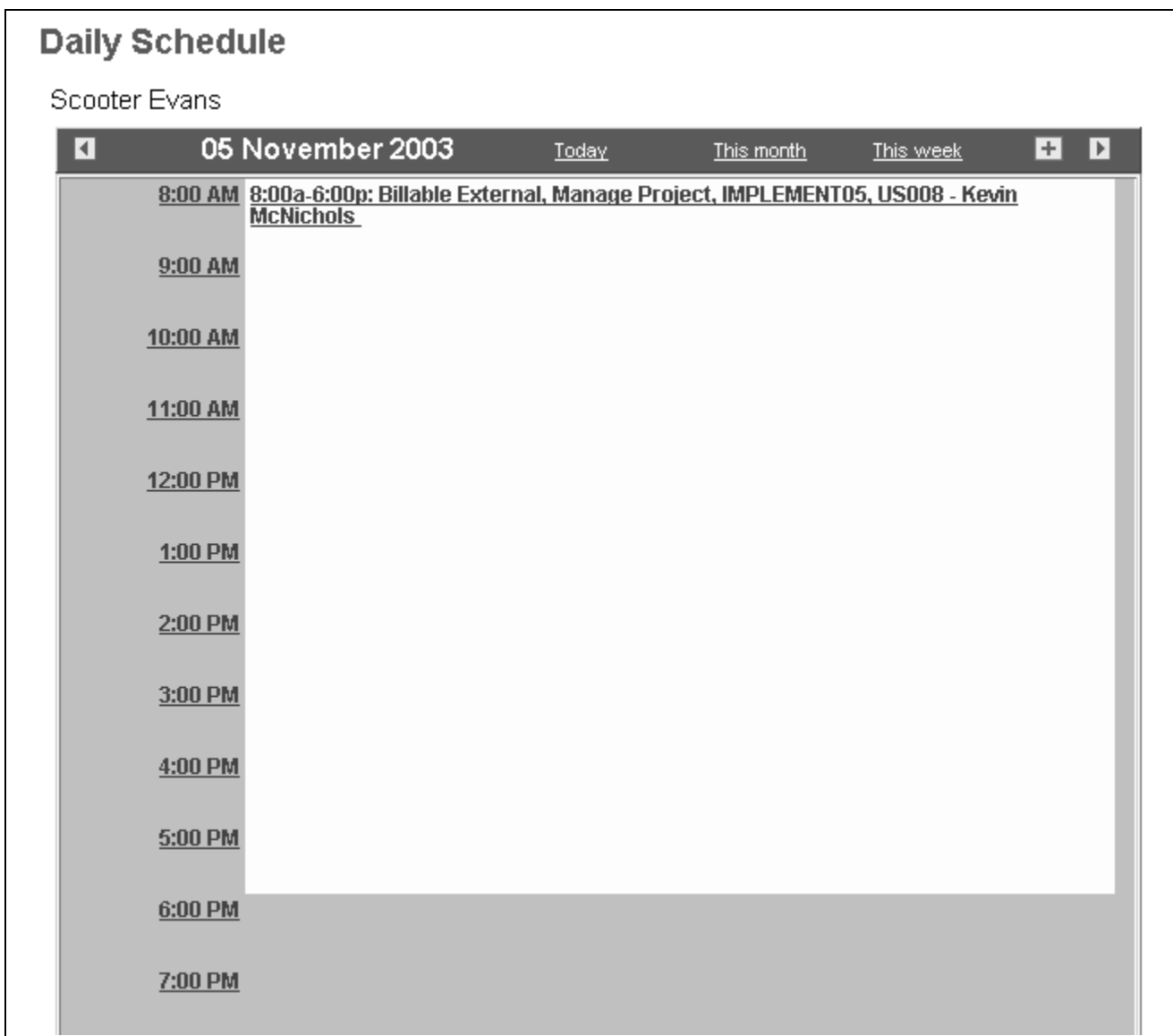
To manage schedules using the Monthly Schedule page:

- Click the arrow indicators to navigation to the next or previous month or year.
- Select a specific month and year to jump to a different period.
- If there are no schedule entries for a day, click the date link to access the Appointment Details page and create a new appointment.
- If there are schedule entries for a day, click the date link to access the Daily Schedule page.
- Click an assignment description link to access the Assign Resource page and view details about the assignment.
- Click an appointment description link to access the Appointment Details page and view details about the appointment.

Note. An appointment description that is not a link indicates that a task cannot be modified. For example, holidays that are loaded by the Holiday Load process and third-party calendar entries (which are synchronized with the resource schedule) cannot be modified from the resource schedule.

Daily Schedule

Access the Daily Schedule page.



Daily Schedule page

The daily schedule provides a quick overview of tasks for a given day in hourly increments. Tasks that start at anytime during an hour include a description of the actual task start time, end time, and activity information. Multiple tasks within an hour appear in order of start time. Highlighting indicates when a task overlaps with another task in a given hour.

The Daily Schedule page functions much like the other schedule pages:

- Use the arrow indicators to scroll to the next or previous day.
- Click the hour link to access the Appointment Details page to create a new appointment.
- Click an appointment or assignment description link to view details about the entry on the Appointment Details page or the Assign Resource page.

Weekly Schedule

Access the Weekly Schedule page.

Weekly Schedule						
Scooter Evans						
◀ 02 November 2003 - 08 November 2003 ▶ ◀ Current Week ▶						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
2	3 8:00a Manage Project	4 8:00a Manage Project	5 8:00a Manage Project	6 8:00a Manage Project 1:30p Weekly Staff Meeting	7	8

Weekly Schedule page

The Weekly Schedule page functions much like the other schedule pages:

- Use the arrow indicators to navigate to the next or previous week.
- If there are no entries on a day, click the date link to access the Appointment Details page to create a new appointment.
- If there are entries on a day, click the date link to access the Daily Schedule page.
- Click an appointment or assignment description link to view details about the entry on the Appointment Details page or the Assign Resource page.

Maintaining Holidays and Third-Party Calendars

Access the Monthly Schedule page.

Synchronize Calendar

Click to submit a Calendar Synchronization process request to synchronize a Microsoft Outlook or Lotus Notes network calendar with the resource schedule. The Synchronize Calendar button becomes inactive and cannot be invoked again until the scheduled process is complete.

This button appears only if you integrate with a third-party calendar application and if you configured calendar synchronization options for the resource.

Update Employee's Holidays

Click to initiate the Holiday Load process to refresh holidays on the resource schedule. All of the holidays that are associated with the holiday schedule are inserted into the resource schedule as tasks with the task category *HOLIDAY*. The refresh process occurs in the background in real time. A message indicates when the process is complete.

Use this button when a resource accepts a future-dated job change that changes the resource's holiday schedule.

Scheduling Appointments

This section discusses how to:

- Enter appointment details.
- Send a schedule change notification.
- View assignment information.

Pages Used to Schedule Appointments

Page Name	Object Name	Navigation	Usage
Appointment Details	RS_SCHED_APPT	• Resource Management, Maintain Schedules, Monthly Schedules, Monthly Schedule • Resource Management, Maintain Schedules, My Monthly Schedule, Monthly Schedule Click the date link on the Monthly Schedule page. • Click the date link on the Weekly Schedule page. • Click the hour link on the Daily Schedule page. • Click an appointment description link on the Monthly Schedule, Weekly Schedule, or Daily Schedule page.	Add, view, or modify an appointment.
Notification Message	RS_SCHED_WFNOTIFY	Click Save on the Appointment Details page.	Send an email notification to the resource or resource manager if a schedule changes.
Assign Resource	RS_ASSIGN_MAIN	Click an assignment description link.	View or modify assignment details.

Entering Appointment Details

Access the Appointment Details page.

Appointment Details

Scooter Evans

RS00000006

Enter detailed information for the appointment. Use "Repeat" and "Until" to set up recurring events. Use "Interval" to specify events like every 3rd day or every 3rd week where "Interval" would equal 3. For events that occur on a monthly basis, specify "For month" adjusted from the first of the month or the last of the month, e.g. the 4th Friday of a month versus the last Friday of the month.

*Start Date: 10/30/2003 

*Start Time: 1:30:00PM

Hours per Day: 1.50

Category: Meeting 

Description: Weekly Staff Meeting

Occurrence Information

*Repeat: Weekly 

Interval: 1

Until: 12/18/2003 For Month: from first 

Appointment Details page

Start Date Enter the appointment start date. For a new appointment, the default value is the current system date.

Start Time Enter the time of day when the appointment starts. For a new appointment, the default value is the standard start time that is specified during implementation.

Hours per Day Enter the number of hours per day that the resource spends on the appointment. Enter a decimal number for increments of less than an hour. For example, enter 1.75 for a meeting duration of 1 hour and 45 minutes.

The default value is the standard hours per work day that is specified during implementation on the Installation Options - Resource Management page, except when you create an appointment from the Daily Schedule page. In that case, the default value is 1.00.

Category Enter the appointment task category. Available values are based on the user role and options that are selected during implementation on the Installation Options - Resource Management page.

Occurrence Information

Create entries for a recurring appointment in the Occurrence Information group box.

Repeat Enter the appointment frequency. Options are:

Daily: Select for events that recur every workday.

Monthly by Date: Select for events that recur every month on the same date of the month.

Monthly by Day: Select for events that recur every month on the same day of the month, such as the second Tuesday of each month. You must also select a value in the Repeat for Month field.

Once: Select for events that only occur at the day, date, and time entered. This is the default value.

Weekly: Select for events that recur every week on the same day of the week.

Yearly: Select for events that recur every year at the same month, date, and time.

Interval

Enter the appointment frequency interval. For example, enter an interval of 3 with a repeat value of *Weekly* to schedule the appointment every third week.

Until

Enter the final date of the recurring appointment.

For Month

Enter a value if the event repeats monthly by day. Options are:

from first: Select to have the system count forward from the first day of the month to schedule the recurring event. For example, an appointment that starts on Thursday, January 1, and repeats monthly by day until December 31 is scheduled on the first Thursday of every month from January through December.

from last: Select to have the system count back from the last day of the month to schedule the recurring event. For example, an appointment that starts on Friday, January 30, and repeats monthly by day until December 31 is scheduled on the last Friday of every month from January through December.

This field is available only if the repeat value is *Monthly by Day*.

Appointment Conflicts

You can schedule overlapping appointments in PeopleSoft Resource Management.

Daily Schedule

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◀

06 November 2003

Today

This month

This week

+

▶

8:00 AM	8:00a-6:00p: Billable External, Manage Project, IMPLEMENT05, US008 - Kevin McNichols
9:00 AM	
10:00 AM	
11:00 AM	
12:00 PM	
1:00 PM	1:30p-3:00p: Meeting, Weekly Staff Meeting
2:00 PM	
3:00 PM	
4:00 PM	
5:00 PM	
6:00 PM	
7:00 PM	

Conflicting events on the Daily Schedule page

The conflicting event with the later start time is highlighted on the Daily Schedule page.

Sending a Schedule Change Notification

Access the Notification Message page.

Notification Message

The following e-mail will be sent to notify the user and resource manager of a modification in the schedule. Please add any additional comments under Note. Select OK to continue or Cancel to not send the e-mail and discard the save attempt.

E-Mail To:
peoplesoft@peoplesoft.com

Subject:
Calendar changes for employee Nancy Ball on date 2003-09-26.

Message:

Changes made by Cornelia Aguilar.
CHANGED task 'CORPORATE' from 'CORPORATE' with description 'Service Award Celebration'.

Note:

Notification Message page

If email notification options are active, the Notification Message page appears when you save a new or modified appointment.

During implementation on the Installation Options - Resource Management page, you can select the option to send the message to the resource, resource manager, or both. You also select the tasks that, when changed by the resource, the resource manager, or the staffing manager, trigger the workflow.

Note Enter additional comments to explain the change.

OK Click to commit the appointment to the schedule and send the notification message to the indicated recipients.

Note. The E-Mail To field appears blank on the Notification Message page if there are no email addresses established for the user IDs that are associated with the recipients. When you click OK on the Notification Message page, a warning appears indicating that no email message was sent because no recipients are defined on the message. The appointment is committed to the schedule. Click OK to close the warning message.

Cancel Click to cancel the message, discard the save attempt, and return to the Appointment Details page.

Note. When workflow is activated, the appointment will not save until you click OK on the notification message.

Viewing Assignment Information

Access the Assign Resource page.

The Assign Resource page appears when you click an assignment description link from the monthly, daily, or weekly resource schedule.

Your user role and the options that are selected during implementation determine if you can modify the assignment, change assignment dates, or merely review assignment details.

See Also

[Chapter 20, “Assigning Resources,” page 253](#)

CHAPTER 20

Assigning Resources

This chapter provides an overview of resource assignments in PeopleSoft Resource Management and discusses how to:

- Assign resources.
- Approve assignment schedule changes.

Understanding Resource Assignments in PeopleSoft Resource Management

The assignment process pairs a resource with a unit of work. Assignments interact with the other key data components—resource profiles, resource schedules, and service orders—that support the staffing process. When you create an assignment and process it through various states, PeopleSoft Resource Management creates a new resource schedule entry or updates an existing entry. When you assign a resource to a project or a resource completes the assignment, PeopleSoft Resource Management updates the resource profile with work experience information. When you select a resource to fulfill a resource request on a service order, an assignment is created and can be viewed from the service order to reflect service order fulfillment progress. Once the number of resources assigned equals the quantity of resources requested for an order, the service order is closed.

You can view or update assignments based on your user role from the folder navigation, the Staffing Workbench component, or the My Assignments component.

This section lists prerequisites and discusses:

- Assignment processes.
- Assignment statuses.
- Assignment dates.
- Assignment workflow.

See Also

[Chapter 2, “Understanding PeopleSoft Resource Management Business Processes,” Data Components That Support the Staffing Process, page 8](#)

Prerequisites

Before creating assignments, you must establish assignment approval and email notification options.

See Also

Chapter 5, “Defining PeopleSoft Resource Management Business Units,” Specifying PeopleSoft Resource Management Business Unit Options, page 52

Assignment Processes

You can use any of these methods to create an assignment in PeopleSoft Resource Management:

- Create a direct assignment when you already know the appropriate resource to fulfill a requirement and you don’t need to track the requirement on a service order.
- Use the Express Search feature to find available resources who closely match a specified list of competencies and accomplishments, and create an assignment for the most qualified resource.
- Initiate a service order to track one or more resource requests—each with a unique set of qualification requirements—for the same project, and create assignments as part of the service order fulfillment process on the Staffing Workbench.
- In PeopleSoft Program Management, select a resource for a project and create an assignment.

Assignment Statuses

The assignment status controls much of the workflow within PeopleSoft Resource Management business processes. It determines whether a service order is fulfilled and whether tasks are created on resource schedules, and it can trigger additional workflow approvals and email notifications.

Actions Triggered by Assignment Statuses

As an assignment moves through various stages and its status is updated, it triggers certain events in other areas of the application. Assignment statuses determine the resource fulfillment progress of resource requests and service orders in PeopleSoft Resource Management, and project resource lists in PeopleSoft Program Management. Statuses also determine which assignments appear on resource schedules and in the work history section of resource profiles.

This table describes assignment status values and lists the actions that each value triggers:

Assignment Status	Description	Triggers These Actions
Assign	The resource's assignment is confirmed. To change the status to <i>Assign</i> you can: • Select the <i>Assign</i> status on the Assign Resource page. • Select the <i>Assign</i> action on the Staffing Workbench. • In PeopleSoft Program Management, select the Assign check box on the Resources page for an active project. Note. If approval workflow is required, the <i>Assign</i> status value changes to <i>Pending Approval</i> until the assignment has completed the approval workflow.	This status updates the resource schedule, resource profile, and project resource list in PeopleSoft Program Management. If the assignment fulfills the quantity on the resource request, the resource request is closed and other assignments that are attached to this resource request that are not in a status of <i>Assign</i> are canceled.
Cancel	The assignment is canceled. To change the status to <i>Cancel</i> you can: • Select the <i>Cancel</i> status on the Assign Resource page. • Select the <i>Cancel</i> action on the Staffing Workbench. • In PeopleSoft Program Management, select the Cancel/Complete Assignment icon on the Resources page. Alternatively, the system can change the status automatically during workflow processing as follows: • If you fulfill the quantity required on a resource request, the outstanding assignments for the resource request that are not yet <i>Assigned</i> are automatically canceled. • If you close a resource request, the outstanding assignments for the resource request that are not yet <i>Assigned</i> are automatically canceled.	If you cancel an assignment on the Assign Resource page, the Assign Resource - Assignment Status page appears for you to enter an effective date. This status updates the resource schedule, resource profile, resource request, and project. These actions occur if you cancel an assignment from the Resources page in PeopleSoft Program Management: • If the project is pending (which means the assignment is in <i>Reserve</i> status), the assignment status is canceled. • If the project is active and the cancel date is earlier than the project start date, the assignment is canceled. Canceling an assignment does not remove the resource from the project resource list in PeopleSoft Program Management or the project team in PeopleSoft Project Costing. Note. If no assignments exist in a status of <i>Assigned</i> on a service order and the service order is canceled, all of the resource requests on the service order are automatically canceled and the service order is no longer editable.

Assignment Status	Description	Triggers These Actions
Complete	The work assignment is complete. To change the status to <i>Complete</i> you can: • Select the <i>Complete</i> status on the Assign Resource page. • Select the <i>Complete</i> action on the Staffing Workbench. • In PeopleSoft Program Management, select the Cancel/Complete Assignment icon on the Resources page.	If you complete an assignment on the Assign Resource page, the Assign Resource - Assignment Status page appears for you to enter an effective date. This status updates the resource schedule, resource profile, and project. These actions occur if you complete an assignment from the Resources page in PeopleSoft Program Management: • If the project is active and the complete date is later than the project start date, the assignment status changes to <i>Complete</i>. • If transactions exist for the resource on the project, the assignment status changes to <i>Complete</i>.
Interview	The resource is interviewing for the assignment. You can change the status to <i>Interview</i> on the Assign Resource page or the Staffing Workbench.	An assignment in this status appears on the resource request, but does not change the request status.
Pending Approval	The assignment was submitted to the resource's manager and is awaiting approval. If a user selects an assignment status of <i>Assign</i> and approval workflow is required, the assignment is automatically placed in a status of <i>Pending Approval</i> until the manager approves or rejects it.	This status triggers approval workflow, if enabled. Updates the resource schedule and appears on the resource request, but does not change the request status. If the requested quantity on the resource request is one and there is an assignment against it in a <i>Pending Approval</i> status, the system will not allow any more assignments in an <i>Assigned</i> or <i>Pending Approval</i> status.
Propose	The resource is proposed for the assignment. You can change the status to <i>Propose</i> on the Assign Resource page or the Staffing Workbench.	An assignment in this status appears on the resource request, but does not change the request status.

Assignment Status	Description	Triggers These Actions
Reject	The assignment is rejected. The status is automatically changed to <i>Reject</i> during workflow processing when you reject the assignment on the Assignment Approval page.	This status updates the resource request and resource schedule.
Reserve	The resource is reserved for the assignment. To change the status to <i>Reserve</i> you can: • Select the <i>Reserve</i> status on the Assign Resource page. • Select the <i>Reserve</i> action on the Staffing Workbench. • In PeopleSoft Program Management, select the Reserve check box on the Resources page for a project in a Pending processing status. Important! If you change the project's processing status from Pending to Active, you must manually change the status of the assignment from <i>Reserve</i> to <i>Assign</i>. Assignments are not automatically converted to an assigned status when the project's processing status changes.	This status updates the resource schedule and appears on the resource request, but does not change the request status.

Valid Status Changes

This table lists available statuses that you can select for an assignment based on the assignment's current status listed in the left column:

Current Assignment Status	Available Assignment Statuses
None (new assignment)	Assign Interview Propose Reserve
Assigned	Cancel Complete

Current Assignment Status	Available Assignment Statuses
Canceled	None
Complete	None
Interviewing	Assign Cancel Propose Reserve
Pending Approval	Cancel
Proposed	Assign Cancel Interview Reserve
Rejected	Assign Cancel

Assignment Dates

You can specify different days per week, hours per day, or start times throughout the duration of a single assignment. You can also enter multiple date ranges on an assignment to specify that the resource is needed on the job in noncontiguous intervals.

New or modified assignment dates trigger changes to the resource's schedule, availability, and profile. You can change assignment dates based on the permissions that are associated with your user role. Based on project business unit options that you select during implementation, a resource's manager can approve or reject schedule changes that are made to the resource's assignment. In addition, the resource, resource manager, or project manager can receive an email notification when the resource's schedule changes.

The system validates that assignment schedules fall within the project schedule. You cannot save an assignment in a status of *Assign* or *Reserve* if the assignment start or end dates are outside of the project's date range.

If you use PeopleSoft Program Management:

- Assignment schedules are reflected on the resource list in Program Management, and the assignment ID appears on the Resource Detail page.

You can click the assignment ID to open assignments and view details.

- Resources can have only one assignment on a particular day for the same project. Resources can have multiple assignments for the same project, but the assignment schedule dates cannot overlap.

Assignment Workflow

Specify a project business unit's workflow options for assignment approvals or notification messages on the Resource Management Options page during implementation. You determine:

- If a resource manager must approve resource assignments.
- If a resource manager must approve assignment schedule changes.
- If a resource, resource manager, or project manager is notified if an assignment schedule changes.
- If a resource, resource manager, or project manager is notified if an assignment's status changes.

For this option, you select the assignment statuses that trigger a notification message.

Important! For all resources, you must enter a supervisor on the Update Employee Data - Employee Job page before you can use workflow to send assignments for approval or notification to the resource manager.

Assigning Resources

This section discusses how to:

- Create assignments.
- Enter customer and project information.
- Enter schedule details.
- View assignment status history.
- Access additional assignment options.
- View the job scorecard.
- Save assignments.
- Approve assignments.

Pages Used to Assign Resources

Page Name	Object Name	Navigation	Usage
Assign Resource	RS_ASSIGN_MAIN	You can access the Assign Resource page through multiple navigation paths. This list presents five frequently used paths. The primary path appears first. - Resource Management, Staffing Workbench, Fulfill Orders Click the Status link in a resource row on the Staffing Workbench - Fulfill Orders or Manage Utilization page. - Resource Management, Express Search, Express Search Click Assign on a resource row on the Express Search page. - Resource Management, Staffing Workbench, Manage Utilization  Click the Create Assignment icon in a resource row on the Staffing Workbench - Manage Utilization page. - Resource Management, Request Resources, Create or Review Service Order, Order Summary Click the Assignment Status link in the Assigned Resources group box. - Resource Management, Staffing Workbench, Fulfill Orders Click the Status link in a resource row on the Staffing Workbench - Fulfill Orders page or Staffing Workbench - Manage Utilization page.	Create, modify, or view assignments.

Page Name	Object Name	Navigation	Usage
Assign Resource - Attach Service Order	RS_ASSGN_SOLOOK	Click Create Link to Service Order on the Assign Resource page.	Associate assignments with existing service orders and resource request line numbers.
Assignment Dates in Conflict	RS_ASSGN_DTS	Click View Conflicts on the Assign Resource page.	View dates on resources' schedules that overlap assignments.
Assign Resource - Schedule Chart	RS_ASSGN_GRP	Click View Schedule Chart on the Assign Resource page.	View resource schedules in a bar chart format.
Assign Resource - Assignment Status	RS_ASSIGN_HISTORY	- Click Status History on the Assign Resource page. - Change the assignment status to <i>Cancel</i> or <i>Complete</i>.	Enter new assignment statuses and effective dates.

Page Name	Object Name	Navigation	Usage
Job Scorecard for <Resource>	RS_JOB_SCRD_SEC	You can access the Job Scorecard for <Resource> page through multiple navigation paths. This list presents five frequently used paths. - Click View Score Card on the Assign Resource page (if the assignment is associated with a service order). - Resource Management, Staffing Workbench, Fulfill Orders Click a qualification or availability score for a resource on the Staffing Workbench - Fulfill Orders page. - Click a qualification or availability score for a resource on the Staffing Workbench - Manage Utilization page. - Resource Management, My Assignments, Job Spy Click a qualification, preferences, or availability score on the Job Spy page. - Resource Management, Express Search, Express Search Click a qualification or availability score for a resource in the Search Results grid on the Express Search page.	View resources' fit scores against the requirements that you specify in a search or on a resource request.

Page Name	Object Name	Navigation	Usage
Assignments for <Resource>	RS_RSRCASSGN	- Click View Resource's Assignments on the Assign Resource page. - Resource Management, Staffing Workbench, Fulfill Orders  Click the View resource assignment list icon for a resource in the expanded Requests scroll area on the Staffing Workbench - Fulfill Orders page.  Click the View List of Assignments icon for a resource in the Resources work space on the Staffing Workbench - Manage Utilization page.	View resources' current or past assignments, bids from resources, and recommendations for resources.
Notify Contract Administrator	RS_ASSGN_BILL_SEC	Click Notify Contracts Administrator on the Assign Resource page.	Send special billing instructions for this assignment to the contract administrator.
Conflicting Dates Found - Assignment Dates Conflict	RS_ASSIGN_CONFLICT	Click Save on a new or modified assignment. This page appears if the assignment dates conflict with another assignment or appointment.	Review assignments or appointments that have dates in conflict with assignments. Accept the conflicts or cancel the save and correct the assignments.
Assignment Confirmation	RS_ASSGN_CONF	- Click Save on a new or modified assignment that has no dates in conflict with another assignment or appointment. - Click OK on the Conflicting Dates Found - Assignment Dates Conflict.	Review assignment changes and workflows that are triggered for this action.

Page Name	Object Name	Navigation	Usage
Assign Resource (approval page)	RS_ASSIGN_APRVL	- Resource Management, Staffing Workbench, Worklist Click Details for an item with action <i>New Assignment For Approval</i>. - Log in as a resource manager and go to the Assign Resource page. Resource Management, Assign Resource, Assign Resource	Approve or reject assignments if approval workflow is activated.
Assignment Status	RS_ASSIGN_STATUS	Setup Financials/Supply Chain, Product Related, Resource Management, Assignment Status, Assignment Status	Administrators can modify assignment status description values, if required.

Creating Assignments

Access the Create Assignment page.

Assign Resource

Assignment ID: NEXT

Name: 

Department: Sales and Services

Project Role: 

Status:

[Create Link to Service Order](#)

Description:

EmpID: RS00000006

Manager Name: George Lane

Personnel Status: Non-Empl

Category:

Responsible For Staffing: 

Header information on the Assign Resource page

The default values that appear on an assignment are based on the assignment's origin. For example:

- If you access the Assign Resource page from the Express Search feature, the resource name and assignment date values appear.
- If you create an assignment from the Staffing Workbench fulfillment process, this information populates the assignment from the service order and resource request:
 - Resource name.
 - Assignment description.
 - Project role.
 - Assignment status.
 - Responsible for staffing.
 - Project business unit.

- Project.
- Customer.
- Location.
- Contact.
- Schedule detail dates.
- Link to the resource request.
- Link to the named resource on the Resources page in PeopleSoft Program Management if the assignment is for a resource request that is associated with a generic resource placeholder.
- If you create an assignment from the Resources page in PeopleSoft Program Management, this information populates the assignment from the project or named resource:
 - Description.
 - Resource name.
 - Project role.
 - Project business unit.
 - Project.
 - Schedule detail dates.

Your ability to edit fields or select certain field values is based on your user role and the assignment origin.

Assignment ID	Displays the assignment ID that you enter or that was autogenerated based on the Assignment ID Last Used value on the Installation Options - Resource Management page. Autogenerated values appear as <i>NEXT</i> until you save the assignment.
Name	Enter the name of the resource who will work on this assignment. The system populates the assignment hours, start time, and days of the week based on the resource. This field is required to save an assignment in any status. Note. If you type the resource name in this field and there are multiple employee IDs with the same name, a message appears stating that the system selected the first employee ID that is associated with this resource name. If you want to select a different employee ID, click the Lookup Employee icon, search for the resource name, and select the appropriate resource.
Personnel Status	Displays the resource’s personnel status as <i>Employee</i> or <i>Non-Employee</i> .
Department and Manager Name	Displays the name of the resource’s department and manager.
Project Role	Enter the project role for this assignment. If the assignment is created in PeopleSoft Program Management, the project role from the Resource Detail page populates this field and is not editable. This field is required to save an assignment in a status of <i>Reserve</i> or <i>Assign</i>. You cannot change the project role for assignments in an <i>Assign</i> status.

Status	Enter the assignment status. Available values are based on the current status of the assignment. The default value is <i>Assign</i>. If you select a status of <i>Assign</i> and approval workflow is required, the assignment is automatically placed in a status of <i>Pending Approval</i> until it is approved or rejected. If you assign a resource to a pending project in PeopleSoft Program Management, the resource status is <i>Reserve</i>. Changes to status can trigger email notification to the resource, resource manager, or project manager, depending on the workflow options that you select on the Resource Management Options page during implementation. The system sends a worklist item to the resource if you create a new assignment with a status of <i>Assigned</i>, or modify the status of an existing assignment from any status to <i>Assigned</i>.
Description	Enter a description of the assignment.
Category	Enter the assignment task category. Use task categories to distinguish between different types of tasks on a resource's schedule, for both informational purposes and in the Resource Match engine calculation of the Availability fit score. Each task category is assigned a flexibility percentage, which is used in the Resource Match engine to identify how easily a task of that category can be rescheduled. The default value is <i>Billable External</i>. This field is required to save an assignment in a status of <i>Reserve</i> or <i>Assign</i>.
Responsible For Staffing	Enter or edit the name of the staffing coordinator or person who is responsible for fulfilling this assignment. This field is for information only.
Create Link to Service Order or Service Order: <service orderID/resource request ID>	Click Create Link to Service Order to associate this assignment with an existing service order and resource request line. Available values are based on the project business unit. Once an assignment is associated with a service order, a link to the order appears here. You can click the link to access the service order. Once a link is established, you cannot change or remove it.
Generic Resource Name: <resource name>	Click to access the Resources page in PeopleSoft Program Management and view the project resource list. This link appears if the assignment is for a resource request that is associated with a generic resource placeholder in PeopleSoft Program Management.

Entering Customer and Project Information

Go to the Customer/Project Information group box on the Assign Resource page.

Customer/Project Information			
*Business Unit:	JPN01		
Project:	0000000149	Resource Mgmt Install	
Customer:	JPN01	Super Sport Max Japan	
Location:	Main	Contact:	Lo,Fay
Location Details		Contact Details	

Customer and project information on the Assign Resource page

Business Unit

Enter the project business unit for the assignment. This value determines the list of service orders, projects, and customers that you can associate with this assignment. It also controls workflow options for assignment approval, date change approval, and notification messages.

This field is required to save an assignment in a status of *Reserve* or *Assign*.

Project

Enter the project that is associated with this assignment. If the assignment is associated with a service order that has a project ID, and the service order has another assignment in a status of *Assigned*, then the service order project ID value appears in this field and cannot be changed. If this condition does not exist on the service order, you can enter a project ID.

If the assignment is associated with a service order that has a project ID, the assignment project ID must be identical to the service order project ID. If the assignment project is different than the service order project when the assignment status changes to *Assigned*, then the assignment project overwrites the service order project.

This field is required to save an assignment in a status of *Reserve* or *Assign*.

Customer

Enter the customer name. If the assignment is associated with a service order that has a customer ID, and the service order has another assignment in a status of *Assigned*, then the service order customer ID value appears in this field and cannot be changed. If this condition does not exist on the service order, you can enter a customer ID.

If the assignment is associated with a service order that has a customer ID, the assignment customer ID must be identical to the service order customer ID. If the assignment customer is different from the service order customer when the assignment status changes to *Assigned*, then the assignment customer overwrites the service order customer.

Location

Enter the customer location for this assignment.

Location Details

Click to access the customer profile and view or update housing and travel information, dress code, and whether the customer allows trainees on assignments.

See [Chapter 12, “Establishing Customers,” Adding Information to Customer Profiles, page 123](#).

Contact

Enter the customer contact for this assignment.

See [Chapter 12, “Establishing Customers,” Working with Customer and Contact Profiles, page 122.](#)

Contact Details

Click to access the contact profile and view information about the customer contact such as telephone number and email address.

Entering Schedule Details

Go to the Schedule Detail Dates and Schedule Exception Dates group boxes on the Assign Resource page.

The screenshot displays two sections on the Assign Resource page:

- Schedule Detail Dates:**
 - Start Date: 03/12/2004
 - End Date: 07/30/2004
 - Hours: 7.00
 - Start Time: 9:00:00AM
 - Comments: Proj Consultant - Super Sport
 - Days: ☒ Monday, ☒ Tuesday, ☒ Wednesday, ☒ Thursday, ☐ Friday, ☐ Saturday, ☐ Sunday
 - Extension: ☐ Extension
 - Links: [View Conflicts](#), [View Monthly Schedule](#), [View Schedule Chart](#)
- Schedule Exception Dates:**
 - Start Date: 06/14/2004
 - End Date: 07/02/2004
 - Hours: 7.00
 - Start Time: 8:00:00AM
 - Comments: Consultant unpaid time off

Schedule information on the Assign Resource page

Start Date and End Date

Enter the start and end dates for the assignment. If the resource will work on the assignment in noncontiguous intervals, click the button to add a new row for each date range. For example, if a resource will work on this assignment from January 1 to January 31 and again from March 1 to March 31, then enter the schedule details for the first date range on one row and the schedule details for the second date range on another row.

You can also use schedule detail lines to indicate schedules with variable hours or days. For example, if a resource works eight hours on Monday, Wednesday, and Friday, and four hours on Tuesday and Thursday, you can enter two lines with the same start and end dates. Specify eight hours per day on Monday, Wednesday, and Friday for one line, and four hours per day on Tuesday and Thursday for the second line.

Note. If this assignment is associated with a project resource in PeopleSoft Program Management, the system automatically updates the assignment if the resource’s project schedule changes.

Hours

Enter the hours per day that the resource is expected to work. The value that appears when you enter the resource for this assignment is based on the resource’s standard hours that are specified in the employee’s job information and stored in the Standard Hours field (STD_HOURS) in the Job record (JOB), and the resource’s standard work days that are specified on the resource profile and stored in the Standard Days field (STD_DAYS) in the Worker Table record (RS_WORKER_TBL).

Tasks that are equal to the number of hours that is specified here are created on the resource's schedule for every day of the week that is specified on the assignment that occurs between the start date and end date.

The assignment hours are the same for every day on a schedule detail line. Use multiple schedule detail lines for assignments with variable hours per day.

Start Time

Enter the time of day that the resource starts work. The value that appears when you enter the resource for this assignment is the standard start time that is specified on the Installation Options - Resource Management page.

Detail Status

Displays a schedule detail row status of Pending Approval if assignment schedule changes are submitted but not yet approved. This is to indicate that new or changed data exists on the row.

This field appears only if assignment schedule change approval is required and a change is submitted but not approved.

Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday

Select the days of the week that the resource is expected to work. The default value is based on the resource's standard work days that are specified on the resource profile and stored in the Worker Table record.

Assignment tasks are entered on the resource's schedule for each day that you select on the assignment page that occurs between the start and end date for assignments in a status of *Assigned*, *Pending Approval*, or *Reserved*.

Extension

Click if this detail date row is an extension of the original assignment end date. This field is used for information only.

If schedule change approval workflow is activated and the assignment is in an *Assigned* status, the system sends the assignment to the resource manager for approval when the schedule changes.

The system sends a worklist item to the resource if you create modify a date for an assignment in an *Assigned* status.

Schedule Conflicts

Access the Assignment Dates in Conflict page.

Conflicting Dates Found

Assignment Dates Conflict

The following dates were found to be in conflict. By accepting, OK, the assignment will be saved with the dates potentially overbooked. By rejecting, Cancel, the assignment will not be saved allowing you to correct the dates.

Assignment ID: 0000000235

Customize Find View All  First 1-4 of 4 Last				
Date	Scheduled Hours	Assignment ID		Description
2004-04-05	10.00	0000000236	Billable External	Maverick Project
2004-04-06	10.00	0000000236	Billable External	Maverick Project
2004-04-07	10.00	0000000236	Billable External	Maverick Project
2004-04-08	10.00	0000000236	Billable External	Maverick Project

Assignment Dates in Conflict page

When you click View Conflicts on the Assign Resource page, this page appears if this assignment conflicts with an existing entry on the resource schedule. If no conflicts exist, a message appears stating that there are no conflicts for the selected dates.

Date Click a date on an appointment row to open the resource's monthly schedule in a new browser window and view or modify the resource schedule.

Assignment ID Click an assignment ID on an assignment row to open a new browser window and view details about the conflicting assignment. You can update or delete conflicting tasks based on the permissions that are associated with your user role, or modify the schedule of the current assignment to accommodate the conflicts.

Schedule Exception Dates

Use this feature to specify breaks in the assignment schedule, such as a scheduled vacation, or a period of time during the project when the resource is not needed on the assignment. Enter the dates, hours, and time that the resource will not work on the assignment. Add comments to explain breaks in the assignment schedule.

You can create assignment exceptions that occur within a date and time range of a schedule detail row. The scheduling logic first lays out all of the details dates, then removes all the exception dates.

Note. Use assignment schedule exceptions only to remove assignment tasks for the specified dates—they do not add tasks of another type to the resource schedule in place of the assignment task entries. For example, if you enter an exception for one week due to a vacation, the assignment task does not appear on the schedule for the specified week, and the vacation task does not appear unless you add it manually to the schedule.

Viewing Assignment Status History

Access the Assign Resource - Assignment Status page.

Assign Resource

Assignment Status

Name:

Evans,Scooter

Assignment:

0000000235

Description:

Proj Consultant - Super Sport

*Assignment Status:

Assign

As of Date:

Comments:

Assignment Status Change History

Time Stamp	Last Update User ID	Assignment Status	As of Date	Comments
11/12/03 4:50:51PM	VP1	Assign		

Assign Resource - Assignment Status page

Use the Assign Resource - Assignment Status page to view the assignment status history or change assignment status.

Assignment Status Enter or confirm the assignment status.

As of Date

Enter the effective date of the new status. This field is required if you change the status to *Cancel* or *Complete*. Upon saving the assignment with a status of *Cancel* or *Complete*, the application removes all of the entries from the resource schedule where the date is greater than the value of the date entered, and updates the work experience entry in the resource profile with the date entered.

Comments

Enter an explanation for the status change.

Assignment Status Change History

The Assignment Status Change History group box reflects changes in status by adding a new row of data for each status change on the assignment. This group box lists your complete assignment status history in descending chronological order.

Accessing Additional Assignment Options

This section discusses links to additional scheduling tools to assist you in managing assignments.

View Resource's Assignments

Access the Assignments for <Resource> page.

Assignments for Scooter Evans						
Current(4) Bids(0) Recommendations(0) History(1)						
Assignments						
			Find View All 	First	1-4 of 4	Last
Dates	Role	Assignment	Location	Status		
04/05/2004 - 04/09/2004	Legal Contracts	Maverick Project		Assigned	Detail	
03/12/2004 - 07/30/2004	Project Consultant	Proj Consultant - Super Sport	Main	Assigned	Detail	
10/06/2003 - 11/14/2003	Current Project Manager	Manage Project	Primary Address	Assigned	Detail	
01/06/2003 - 06/30/2003	Database Administrator	Lead tech team	East Location	Assigned	Detail	

Assignments for <Resource> page

Use the Assignments for <Resource> page to view a list of the resource assignments. You can drill down to view current or previous assignment details on the Current filter or History filter. You can view summary information or details of resource requests for which the resource has placed a bid or been recommended in the Bids filter or Recommendations filter.

The number of assignments or resource requests that are included in a filter appears in parentheses next to the filter name.

Current

Click to view a list of the resource's assignments in a status of:

- *Proposed*
- *Interviewing*
- *Pending Approval*
- *Assigned*

Assignments that appear in this filter are based on the resource's assignment status. A resource does not have to be currently working on the assignment to appear in this filter. A visual indicator is used to show the current assignment for the resource based on the assignment start and end dates.

Bids

Click to view a list of resource requests for which the resource submitted a bid. A visual indicator is used in this filter if the resource request that placed a bid was assigned to another resource.

Bids are removed from this filter once an assignment is created for this resource-and-resource request combination.

Recommendations

Click to view a list of resource requests for which the resource received a recommendation. A visual indicator is used in this filter if the resource request was assigned to a different resource.

Recommendations are removed from this filter once an assignment is created for this resource-and-resource request combination.

History

Click to view a list of your assignments in a status of:

- *Completed*
- *Canceled*
- *Rejected*

Assignments that appear in this filter are based on the resource's assignment status.



This is a current assignment for the resource based on the assignment start and end dates. A current assignment is defined as an assignment with a start date equal to or before the current system date, and an end date equal to or after the current system date.

This visual indicator may appear in the Current filter or History filter.



Another resource was selected to fulfill a resource request for which this resource submitted a bid or received a recommendation.

This visual indicator appears only in the Bids filter or Recommendations filter.



This visual indicator may appear in the Recommendations filter or History filter.

On the Recommendations filter this indicates that the resource request is canceled.

On the History filter this indicates that the assignment is canceled.

Detail

Click in the Current filter or History filter to access the Assign Resource page and review assignment details. You can modify the assignment or change assignment dates based on permissions that are associated with your user role. To return to the Assignments for <Resource> page, click OK to save changes and return, or click Cancel to return without saving changes.

Click in the Bids filter or Recommendations filter to access the Job Detail page and review information about the service order and

resource request. To return to the Assignments for <Resource> page, click Return to Resource Assignments.

Note. The destination of the Detail link changes based on your active filter.

See [Chapter 26, “Using the Resource Self-Service Feature,” Viewing Resource Request Job Details, page 380.](#)

Notify Contract Administrator

Access the Notify Contract Administrator page.

Notify Contract Administrator

Assignment ID: 0000000144

Contract Administrators

Please select the contract administrator(s) you would like to notify.

Selected	Name
☐	Angelini, Gina
☒	Crawford, William
☐	Masterson, Carlos
☐	Sherwood, Fred

Billing Instructions

The information you enter here will be sent to the contract administrators specified above.

Billing Instructions:

Notify Contract Administrator page

Use this page to send special billing instructions about this assignment to the contract administrator.

Selected	Select from the list of contract administrators, which consists of those users who are identified in PeopleSoft Contracts as the managers of support teams on the contract for which this project is associated.
Billing Instructions	Enter comments and instructions.
OK	Click to return to the assignment. The message is sent when you save the assignment.

Other Scheduling Options

You can access these other resource scheduling tools from the Assign Resource page:

- Select View Score Card to access the Job Scorecard page and view the detailed evaluation of the resource's qualifications, availability, and preferences compared to the selected resource request.

This link is available if the assignment is associated with a service order.

- Select View Monthly Schedule to access the resource's Monthly Schedule page.
- Select View Schedule Chart to access a graphical view of the resource's schedule. The chart displays the default task categories and colors that are specified during implementation on the Installation Options - Resource Management page.

See Also

[Chapter 19, "Maintaining Resource Schedules," Working with Resource Schedules, page 242](#)

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up PeopleSoft Resource Management Installation Options

Viewing the Job Scorecard

Access the Job Scorecard for <Resource> page.

Job Scorecard for Scooter Evans

ID: JPN01/000000007/1 (Business Unit / Service Order ID / Resource Request Number)

Request: Japan Operations Interunit Customer, Project Consultant Project Cons-Japan Operations 1 Resource(s) Needed, Start 04/01/2004, End 10/01/2004, 89 Days

Qualifications

[Go To Preferences](#)
[Go To Availability](#)

Qualifications Fit Score: 82%

Requested Competencies						
	Description	Importance	Proficiency	Years of Work Experience	My Proficiency	Years of Work Experience
✖	Systems Analysis	Desired	4-Very Good	2.0	3-Good	6.0
✓	Database Design	Desired	4-Very Good	2.0	4-Very Good	3.0
✖	DB2	Desired	4-Very Good	5.0	5-Expert	3.0
✖	Project Management	Desired	3-Good	1.0		

Requested Degrees			
Degree	Major Code	Description	Importance
✓ Master of Civil Engineering	K000012	Mechanical Engineering	Desired

Requested Licenses - There are no Requested Licenses for this Request.

Requested Languages - There are no Requested Languages for this Request.

Job Scorecard for <Resource> page (1 of 3)

Requested Memberships	
Membership	Importance
☒ Association for Systems Mgmt	Desired

Region - There are no Region factors for this Request.

☒ Qualified
 ☒ Partially Qualified
 ☒ Not Qualified

Recommendations - There are no Recommendations for Scooter Evans.

Project Experience is one of the factors used to determine the overall Qualification family score. To view the project experience for this resource, click on the Work Experience link.

[Work Experience](#)

The Resource's Resume is one of the factors used to determine the overall Qualification family score. To view the resume for this resource, click on the eResume link.

[EResume](#)

Job Scorecard for <Resource> page (2 of 3)

[Go To Qualifications](#)
[Go To Availability](#)

Preferences

Preferences Fit Score: 88%

Scooter Evans entered a Bid for this request on 17 November 2003.

Requested Competency Interest		
Competency	Importance	Interest Level
☒ Systems Analysis	Desired	3-Desirable
☒ Database Design	Desired	3-Desirable
☒ DB2	Desired	4-Very desirable
Project Management	Desired	

☒ Desirable
 ☒ No Preference
 ☒ Undesirable

Availability

[Go To Qualifications](#)
[Go To Preferences](#)

Availability Fit Score: 100%

There are no conflicts for the selected dates.

[Return](#)

Job Scorecard for <Resource> page (3 of 3)

This page is available if the assignment is associated with a service order.

ID	Displays a concatenation of the business unit, service order ID, and resource request ID. This field does not appear if you access the Job Scorecard page from an express search.
Request	Displays information about the resource request if this page is accessed from a service order or the Staffing Workbench.
Qualifications	Displays the qualifications score and lists each specified qualification. Indicates if the resource is qualified, partially qualified, or not qualified based on this accomplishment, competency, or flexible qualification factor.



In the Qualifications region, this icon indicates that the resource meets all of the aspects of the specified competency, accomplishment, or flexible qualification factor.

In the Preferences region, this icon indicates that the resource has indicated a desirable preference for this competency.



In the Qualifications region, this icon indicates that the resource partially meets the specified competency, accomplishment, or flexible qualification factor.

In the Preferences region, this icon indicates that the resource has no preference for this competency.



In the Qualifications region, this icon indicates that the resource does not meet the specified competency, accomplishment, or flexible qualification factor.

In the Preferences region, this icon indicates that this competency is undesirable to the resource.

Work Experience

Click to access the Work Experience page on the resource profile.

EResume

Click to access the resource's resume document attachment.

Preferences

Displays the preferences score and lists each specified qualification. Indicates if the qualification is desirable or undesirable, or if the resource has no preference.

Note. If you access the Job Scorecard from the Express Search page, the Preferences region is not available. Preferences are not evaluated by the Express Search feature.

If the Job Scorecard is accessed from other components in PeopleSoft Resource Management, such as the Assign Resource page or the Staffing Workbench, the Preferences region includes the resource's competency interest, bids, and flexible preference factors.

Availability

Displays schedule conflicts and provides a link to the resource schedule to view schedule details. If there are no schedule conflicts, a message appears indicating that there are no conflicts for the selected dates.

Return

Return to the page where you accessed the Job Scorecard.

Saving Assignments

Click Save to save the assignment. If you save an assignment in a status of *Reserve* or *Assign*, the system verifies that the assignment schedule falls within the project date range.

Assignment Dates Conflict

If there are schedule conflicts, the Conflicting Dates Found - Assignment Dates Conflict page appears, listing the appointments or assignments that have dates in conflict with this assignment. If you accept the conflicts, the system saves assignment with the resource overbooked. This means that the resource may be scheduled to work more than the standard hours per day, depending on how many hours the resource is scheduled to work on the assignments or appointments that occur on the dates in conflict.

Click OK to save the assignment regardless of the overbooking. Click Cancel to return to the assignment and correct the dates.

If you create an assignment from an express search, you can click Apply or OK on the Assign Resource page to save the assignment. Use Apply if you want to view a confirmation of the assignment after you save it.

Saving Assignments Using PeopleSoft Program Management

If you use PeopleSoft Program Management, and the assignment schedule dates conflict with an existing assignment for this resource and project, when you save the assignment a message appears indicating that an assignment exists for the resource for the scheduled date range. Click OK to return to the assignment and resolve the schedule date conflict. You cannot save the assignment if assignment dates overlap for this resource and project.

Assignment Confirmation

If there are no schedule conflicts when you save the assignment, or if you accept the conflicts, the Assignment Confirmation page appears with a summary of the workflow and changes that the save triggers. Click OK to return to the Assign Resource page.

If you create an assignment from an express search, click Apply to save the assignment and view the Assignment Confirmation page if there are no schedule conflicts, then click OK on the Assignment Confirmation page to return to the Express Search page. Alternatively, click OK on the Assign Resource page to save the assignment if there are no schedule conflicts, and return to the Express Search page.

Approving Assignments

Access the Assign Resource approval page.

If assignments require the resource manager's approval, an assignment can be placed in a status of *Assign* only through the approval process or directly by the resource's manager. If you select an assignment status of *Assign* and approval workflow is activated, the assignment is automatically placed in a status of *Pending Approval* until the resource manager approves or rejects it.

Justification	Enter remarks that are pertinent to the assignment approval or rejection. The system appends this information to the assignment history.
Approve	Click to change the assignment status to <i>Assign</i> .
Reject	Click to change the assignment status to <i>Reject</i> .

Approving Assignment Schedule Changes

During implementation, you specify on the Resource Management Options page whether assignment schedule changes require the resource manager's approval.

This section provides an overview of assignment schedule changes and discusses how to approve assignment schedule changes.

Understanding Assignment Schedule Changes

You can modify assignment schedule dates based on the security access of your user role. Resources access the Assign Resource update schedule page from the My Assignments - Assignments page, or by clicking Assign Resource in the Resource Management navigation folder.

If a resource's assignment status is *Assigned*, someone other than the resource's manager changes the assignment schedule and assignment schedule change workflow is activated for the project business unit on the assignment, then:

- The system changes any new or changed assignment detail to a *Pending* status.

The assignment status remains *Assigned*.

- The pending dates are reflected on the assignment, the resource's schedule and availability, and in PeopleSoft Program Management, if applicable.
- The system sends a worklist entry to the resource's manager with a link to the Assign Resource approval page.
- Approved changes to the schedule update the status from *Pending* to *Confirmed*.
- Rejected schedule changes revert the assignment, the resource's schedule, availability, and project team back to the prechange assignment schedule.

The prechange schedule appears on the assignment and reverts back to a status of *Confirmed*.

If a resource's assignment is in any status other than *Assigned* and the assignment schedule changes, then:

- The assignment schedule status is *Confirmed*.
- The system does not generate worklist entries, and no schedule change approvals are required.
- The system publishes schedule changes to PeopleSoft Program Management, if applicable.

If a resource's assignment is in an *Assigned* status, the assignment schedule changes, and assignment schedule change workflow is not activated for the project business unit on the assignment, then:

- The assignment schedule status is *Confirmed*.
- The system does not generate worklist entries, and no schedule change approvals are required.
- The system publishes schedule changes to PeopleSoft Program Management, if applicable.

You cannot save an assignment schedule change if it is associated with a project and the new schedule falls outside of the project's early start and late finish dates.

Page Used to Approve Assignment Schedule Changes

Page Name	Object Name	Navigation	Usage
Assign Resource (approval page)	RS_ASSIGN_APRVL	- Resource Management, Staffing Workbench, Worklist Click Details for an item with action <i>Date Change For Approval</i>. - Log in as a resource manager and access the Assign Resource page. Resource Management, Assign Resource, Assign Resource	Approve or reject assignment schedule changes if approval workflow is activated.

Approving Assignment Schedule Changes

Access the Assign Resource approval page.

You approve assignment schedule changes in the same way that you approve new assignments. You can enter a justification and click Approve or Reject.

CHAPTER 21

Express Searching for Resources

This chapter provides an overview of the Express Search feature and discusses how to express search for resources.

Understanding the Express Search Feature

The Express Search feature enables you to specify resource requirements and search for resources to fulfill those requirements in a single session—without a service order. You can define requirements through the use of a qualification profile, or select from a list of qualifications or the Competency tree. You can also enter free-form keywords in the search criteria. After you define the qualifications, specify the project start and end dates, and select the group of resources to consider, then the Verity search engine goes to work for you. The process compares the resource profiles for all members of the resource group to determine a qualification ranking. It then looks at the resource schedules and returns a list of resources in order of qualification rank and availability.

Use the Express Search feature to:

- Identify possible resources for an opportunity, where a formal request for services is premature.
- Search for resources, select the appropriate resource, and create an assignment in a single session where an audit trail of formal requests for services is not required.
- Explore knowledge capital in specific parts of the organization.
- Identify qualified candidates to fulfill project resource requirements in PeopleSoft Program Management.

If you find resource candidates for the specified requirements but want to keep searching with slightly different requirements, you can move the candidates to a holding area and perform iterative searches. If you decide to save the search criteria—dates, qualifications, and keywords—as a service order, the resources in the holding area appear as recommendations on the service order resource request.

Note. The Express Search feature does not evaluate manager recommendations or resource bids to determine the qualification ranking.

Prerequisites

Before you can use the Express Search feature, you must:

- Create resource groups.

This enables you to limit, broaden, or redirect the search for resources from the Express Search page.

See [Chapter 16, “Enabling Resource Matching and Cache Processes,” Establishing Resource Groups, page 167.](#)

- Create the Verity search index.

This enables you to search on competencies, accomplishments, work experience, and default resume-attachment information for each eligible resource.

See [Chapter 16, “Enabling Resource Matching and Cache Processes,” Understanding the Verity Search Index, page 181.](#)

Express Searching

This section discusses how to:

- Specify requirement dates.
- Specify qualifications.
- Enter keywords for a work experience and resume document search.
- Specify search options.
- Evaluate search results.
- Consider (temporarily hold) resource candidates.

Pages Used to Express Search For Resources

Page Name	Object Name	Navigation	Usage
Express Search	RS_EXPRESS_SEARCH	• Resource Management, Express Search, Express Search •  Click Search on a generic resource row in the Resources page in PeopleSoft Program Management.	Perform iterative searches for resources based on resource qualifications and competency interests.
Express Search - Detailed Date Ranges	RS_SO_DETAILDATES	Click Use Multiple Date Ranges on the Express Search page.	Add multiple, noncontiguous date ranges to search criteria.
Resource Qualifications - Select Qualification Profile	RS_SELQUALPROFILE	• Click Profile on the Express Search page. • Click Profile on the Resource Requests page.	Add qualifications to the search criteria from existing qualification profiles.
Resource Qualifications - Search for Qualifications	RS_QUALIF_SRCH	• Click List on the Express Search page. • Click List on the Resource Requests page.	Add qualifications to the search criteria from a list of qualifications.

Page Name	Object Name	Navigation	Usage
Resource Qualifications - Select Competencies	RS_SO_COMP	- Click Competency Tree on the Express Search page. - Click Competency Tree on the Resource Requests page.	Pick qualifications for the search criteria from the Competency tree.
Qualification Detail: <Qualification>	RS_QUALIF_DETAILS	Click Details on the Qualifications grid.	Specify additional details about requested license, language, or single-value flexible attributes.
Job Scorecard for <Resource>	RS_JOB_SCRD_SEC	You can access the Job Scorecard for <Resource> page through multiple navigation paths. This list presents five frequently used paths. - Click a qualification or availability score for a resource in the Search Results grid on the Express Search page. - Resource Management, Assign Resource, Assign Resource Click View Score Card on the Assign Resource page (if the assignment is associated with a service order). - Resource Management, Staffing Workbench, Fulfill Orders Click a qualification or availability score for a resource on the Staffing Workbench - Fulfill Orders page. - Click a qualification or availability score for a resource on the Staffing Workbench - Manage Utilization page. - Resource Management, My Assignments, Assignments  Click View Job Scorecard in the Bids filter or Recommendations filter on the My Assignments - Assignments page.	View resources' fit scores against the requirements that you specify in a search or on a resource request.

Specifying Requirement Dates

Access the Express Search page.

The screenshot shows the 'Express Search' interface. At the top, there are two date pickers: 'Start Date' set to 3/1/2004 and 'End Date' set to 7/30/2004. To the right of these is a link 'Use Multiple Date Ranges'. Below the date pickers are two tabs: 'Qualifications' (selected) and 'Keywords'. Under the 'Qualifications' tab, there is a section 'Add qualifications from:' with three buttons: 'Profile', 'List', and 'Competency Tree'. Below this is a 'Search Options' section. It contains two dropdown menus: 'Resource Group ID' set to 'All Resources' and 'Personnel Status' set to 'All'. To the right of the 'Resource Group ID' dropdown is a link 'Add Resource Groups'. To the right of the 'Personnel Status' dropdown is a 'Max Candidates' field set to '20'.

Express Search page

Start defining search criteria by entering the project start and end dates. Then you can specify as many qualifications or keywords as necessary to narrow the list of resources that the system returns in the search results.

If you express search from the Resources page in PeopleSoft Program Management, this information populates the Express Search page from the generic resource:

- Start and end date.
- Qualifications, if the generic resource project role is associated with a qualification profile in PeopleSoft Resource Management.

Start Date and End Date

Enter the dates on which the resource starts and ends the work assignment. If the resource is required for multiple, noncontiguous date ranges, you can leave these fields blank and proceed to the Express Search - Detailed Date Ranges page to enter date information.

If you enter this page from the Resources page in PeopleSoft Program Management, start and end dates are populated from the generic resource schedule.

Use Multiple Date Ranges

Click to access the Express Search - Detailed Date Ranges page and enter additional start and end dates.

Multiple Date Ranges

Access the Express Search - Detailed Date Ranges page.

Express Search

Detailed Date Ranges

Enter the periods of time you would like the resource to work.

Earliest Start Date:

03/01/2004

Latest End Date:

07/30/2004

Date Ranges

Customize | Find |

First

1-2 of 2

Last

	Start Date	End Date		
1	03/01/2004	04/30/2004	+	-
2	06/01/2004	07/30/2004	+	-

Express Search - Detailed Date Ranges page

Use this page to enter additional start and end dates if you require that the resource work for multiple date ranges.

Earliest Start Date and Latest End Date Displays the first start date and the last end date for all date ranges.

Start Date and End Date Add new rows as required to specify additional start and end dates for the project. Do not overlap the date ranges.

Specifying Qualifications

Select the Qualifications tab.

Specify the accomplishments, competencies, and flexible qualification factors that define the resource qualification requirements.

If you are express searching to fill a generic resource placeholder in PeopleSoft Program Management, and the generic resource project role is associated with a qualification profile in PeopleSoft Resource Management, qualifications are populated on the Express Search page.

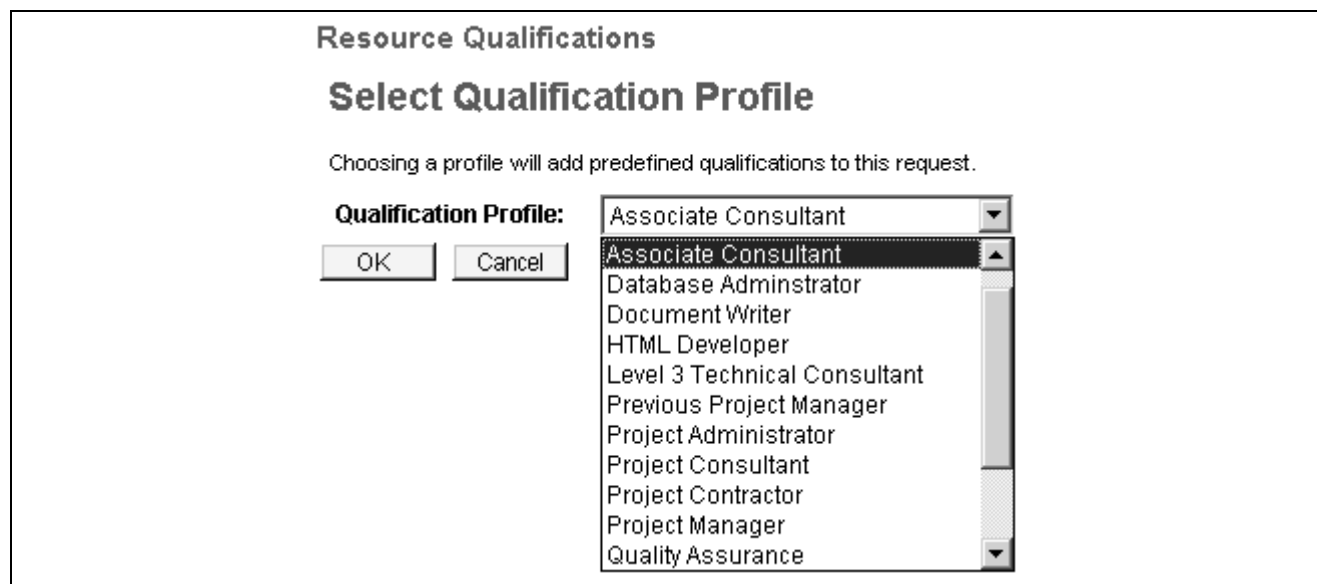
Profile Click to access the Resource Qualifications - Select Qualification Profile page and select a predefined qualification profile from which the system populates qualifications.

List Click to access the Resource Qualifications - Search for Qualifications page and look up specific qualifications.

Competency Tree Click to access the Resource Qualifications - Select Competencies page and pick requirements from the Competency tree.

Profile

Access the Resource Qualifications - Select Qualification Profile page.



Resource Qualifications - Select Qualification Profile page

A qualification profile is a predefined template from which the system populates the Express Search page with the competencies and accomplishments that define a particular resource skill set. If you use qualification profiles, you will find these profiles to be the easiest, quickest, and most accurate method for defining skill requirements.

Qualification Profile

Select a qualification profile that closely matches your requirements.

OK

Click to populate the Qualifications grid with the list of qualifications in the profile, and return to the Express Search page.

You can add or delete requirements from the Qualifications grid without affecting the qualification profile.

List

Access the Resource Qualifications - Search for Qualifications page.

Resource Qualifications

Search for Qualifications

Search Criteria

Select search type: Competency *Search by: Description

Keyword: Any Type
Competency
Degree
Language
License
Membership
Other

Use this page to search for qualifications. The search fields are all optional. You can search by a qualification type, or keywords within the qualification code or description. Use % as a wild card. Move selected search results to your currently selected qualifications at the bottom by using "Add Selection".

Currently Selected Qualifications View All First 1-3 of 3 Last

	Qualification Type	Description	Major
1	Competency	Systems Analysis	
2	Competency	Database Design	
3	Competency	Project Management	

Resource Qualifications - Search for Qualifications page

You can use this page to search for individual competencies and accomplishments that the resource should possess. The page supports iterative searching, enabling you to change the search criteria and perform more searches as needed to construct a complete list of desired qualifications.

Select search type

Select a qualification type as required to narrow the search results. Values are:

Any Type: Returns all competencies, accomplishments, and flexible qualification factors.

Competency: Returns only competencies.

Degree: Returns only degree accomplishments.

Language: Returns only language accomplishments.

License: Returns only license and certificate accomplishments.

Membership: Returns only professional membership accomplishments.

Other <Flexible Qualification Factor>: Returns accomplishments for the flexible qualification factor that you define.

Search by

Specify the text to search if you enter a keyword. Values are:

Description: Searches for a keyword within the qualification description.

Code: Searched for a keyword within the qualification code.

Keyword

Enter a character, word, or phrase that you want to locate within the text of qualification descriptions or codes. The search returns all qualifications of the specified type that meet the keyword criteria.

Leave the field blank to return all qualifications of the specified type.

Enter a single character to return qualifications that begin with this letter or number.

Use % as a wildcard to locate qualifications with a character or word anywhere in the keyword. For example, a Keyword value of %J and a Search by value of *Description* will return all qualifications that contain the letter J anywhere in the code.

Search

Click to search for qualifications based on the search criteria and display the Search Results grid.

Search Results

Displays qualifications that match the search criteria. Select the check box that corresponds to the desired qualification.

Add Selection

Click to move the selected qualifications to the Currently Selected Qualifications grid. This action temporarily holds the selected qualifications so that you can change the search criteria and perform additional searches.

Currently Selected Qualifications

Displays the qualifications that were already selected during this Express Search session using this page, the Resource Qualifications-Select Qualification Profile page, or the Resource Qualifications - Select Competencies page. Add or delete qualifications as necessary until the list is complete.

OK

Click to return to the Express Search page and populate the Qualifications grid with the selected competencies, accomplishments, and flexible qualification factors.

Competency Tree

Access the Resource Qualifications - Select Competencies page.

Resource Qualifications

Select Competencies

Select the competencies below that you would like the resource to have in their skill set.

Competencies

Left | Right

CORP - Corporate

ADMIN - Administration

INTER - Interpersonal

LDRSHP - Leadership

MGMT - Managerial

TECH - Technical

[0513 - Technical Knowledge]

[2001 - Computer Literacy]

[2002 - Computer Operations]

[2003 - Programming]

[2004 - Systems Analysis]

[2006 - Database Design]

[2023 - DB2]

[2024 - SQLBase]

[2025 - SQL Server]

[5016 - Web Server Administration]

[5017 - Application Server Admin]

[5020 - Technical Training]

[5023 - Object Oriented Design]

VISN

Currently Selected Qualifications

View AllFirst1-3 of 3Last

	Qualification Type	Description	
1	Competency	Systems Analysis	
2	Competency	Database Design	
3	Competency	Project Management	

Resource Qualifications - Select Competencies page

The Competency tree, which appears in the Competencies group box, enables you to locate competencies that are grouped by competency type. This tool is useful if you are not familiar with the competencies in the organization because you can click intuitively labeled tree nodes and list the associated competencies. Then you can pick the appropriate competencies from the tree to add to the Qualifications grid.

Specific qualifications that you selected previously during this Express Search session appear in the Currently Selected Qualifications grid.

Competencies	Review competency categories and select the appropriate competency detail values. Selections appear in the Currently Selected Qualifications grid.
Currently Selected Qualifications	Displays the qualifications that you select during this Express Search session. Add or delete qualification rows as needed.

Qualifications

After you select qualifications from a qualification profile, list, and Competency tree, and return to the Express Search page, the qualifications appear in the Qualifications grid.

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Qualifications		Keywords				
Type	Description	Importance	Years of Work Experience	Proficiency	Major	
1 Competency	Systems Analysis	Desired	3 Years	4-Very Good		[-]
2 Competency	Database Design	Desired	1 Year	3-Good		[-]
3 Competency	Project Management	Desired	3 Years	3-Good		[-]
4 Language	German	Desired				Details [-]

Add qualifications from:

Qualifications grid on the Express Search page

Importance

Select how important it is that the resource possess the specified qualification.

Desired: the Verity search engine gives preference to resources who possess the qualification but does not exclude resources who do not possess the qualification. This is the default value.

Required: resources who do not possess this qualification are not returned in the search results.

Years of Work Experience

Select the number of years of experience that the resource should possess for this competency. You can select from *1 Year* to *9+ Years*.

If you select an importance of *Desired* for this competency, the Verity search engine gives preference to resources who possess the specified years of experience but does not exclude resources who do not meet the specified years.

If you select an importance of *Required* for this competency, resources who do not meet the specified years of experience are not returned in the search results.

This field appears only on rows that contain a qualification type of *Competency*.

Proficiency

Select the appropriate level of competency proficiency that the resource should possess for this project.

If you select an importance of *Desired* for this competency, the Verity search engine gives preference to resources with the proficiency level but does not exclude resources who do not meet the specified proficiency.

If you select an importance of *Required* for this competency, resources who do not meet the specified proficiency are not returned in the search results.

The default value is the highest level of competency available. This field appears only on rows that contain a qualification type of *Competency*.

Details

Click to access the Qualification Detail: <Qualification> page and enter additional information about the qualification. The Details link appears only on rows for licences, languages, and single-value flexible attributes because there are additional details that can be entered about these qualifications.

Qualification Details

Access the Qualification Details: <Qualification> page.

Qualification Detail:Language

Description: German

Speaking Proficiency:

Reading Proficiency:

Writing Proficiency:

Qualification Detail: <Qualification> page

Use this page to enter additional information for licences, languages, and single-value flexible attributes.

Speaking Proficiency, Reading Proficiency, and Writing Proficiency

These fields appear only for language qualifications. Select a proficiency for each skill. Available values are *High*, *Moderate*, and *Low*.

Country and State

These fields appear only for license qualifications. Select the Country and State of the license.

Importance

This field appears only for single-value flexible attributes. Select Desirable or Very (desirable) as the level of importance that the resource possess the attribute value that appears in the Description field.

Only resources with one of the values for the attribute <attribute name> listed below will be considered

This field appears only for single-value flexible attributes. Select this option if you will only consider resources who have one of the listed values for this attribute.

Entering Keywords

Select the Keywords tab.

Qualifications
Keywords

Keywords:

Enter keywords to search resource resumes and project experience. You may enter multiple keywords by using AND or OR.

Keywords edit box on the Express Search page

Enter specific keywords here that you can use as a search string to compare against free-form text within the resource's work experience and resume document attachment on the resource profile. This option is best used in cases where the competency information is insufficient or not consistently maintained, or when you want to specify skill requirements that are not listed as competencies or accomplishments.

Keywords

Enter a word, phrase, or string of words in uppercase or lowercase. Use a comma to separate keywords. You can use logical connectors *AND* or *OR* to separate keywords. A comma behaves the same as the *OR* connector. If you *AND* or *OR* connectors, you can use parenthesis to define precedence.

When you run the Express Search, the system searches the resource's work experience and resume document attachment information for matches.

Specifying Search Options

Go to the Search Options collapsible group box on the Express Search page.

Search Options collapsible group box on the Express Search page

Search options enable you to direct the search to a specific group of resources based on organization unit value or supervisor.

Resource Group ID

Select from a list of your active resource groups. The Express Search feature returns candidates only from the selected group.

Add Resource Groups

Click to access the Resource Group Definition - Resource Groups page and define new groups, edit existing groups, or modify your list of active groups.

See [Chapter 16, “Enabling Resource Matching and Cache Processes,” Establishing Resource Groups, page 167.](#)

Personnel Status

This field appears if you allow non-employees—employees with a personnel status of *N*—to be established as resources. Specify a personnel status to narrow the search results if desired. Values are:

All: Consider all types of resources in the search, regardless of their personnel status.

Employees: Consider only employee resources in the search.

Non-Employees: Consider only non-employee resources in the search.

Max Candidates (maximum candidates)

Enter the maximum number of resource candidates to appear in the Search Results grid. When you perform the search, Verity retrieves all matching resources. This field determines the number of rows that appear at one time.

The initial default value is 5. Once you change the value, your most recent selection persists. The maximum value for this field is 50.

The total number of matching resource rows appears above the Results grid. You can navigate to the next or previous group of rows in the result set.

Search for Resources

Click to perform the search based on the specified project dates, qualifications, keywords, and search options.

Evaluating Search Results

resources who best match your requirements and search options appear in the Search Results grid.

Search for Resources									
1 to 5 of 93									
Search Results									
	Qual.	Avail.	Name	Personnel Status	Job Title	Bill Rate	Location	Supervisor	
☐	63%	100%	Scooter Evans	Non-Employee	Senior Con		Las Vegas, NV, USA	George Lane	Assign 
☐	33%	100%	Opal Ryan	Non-Employee	Data Anal		San Luis Obispo, CA, USA	George Lane	Assign 
☐	33%	100%	Marcus Tomas	Non-Employee	Busn Analy		Quebec, QC, CAN	George Lane	Assign 
☐	33%	49%	Armand Falkner	Employee	General Ma	290.00 USD	Santa Clara, CA, USA	Kenneth Grafton	Assign 
☐	33%	11%	George Lane	Employee	General Ma	290.00 USD	Pleasanton, CA, USA	Kenneth Schumacher	Assign 
Consider Create Service Order									

Search Results grid on the Express Search page

The order in which the resources appear in the grid is based on the resource's qualification ranking, which is a function of the resource qualification scores that measure how well resources fit the specified qualifications and keywords that you specify during the Express Search session.

Select the check box beside a resource to move that resource into the Considering grid and temporarily hold the resource while you perform iterative searches.

Qual. (qualification)	Displays the score of how closely the resource's profile data matches the search criteria. Click the link to access the resource's Job Scorecard and view details about requirements that are included in the score for each qualification. See Chapter 20, "Assigning Resources," Viewing the Job Scorecard, page 274.
Avail. (availability)	Displays the score of how closely the resource's schedule matches the search criteria. Click the link to access the Job Scorecard page and view qualification and preference scores, and assignment conflicts. See Chapter 20, "Assigning Resources," Viewing the Job Scorecard, page 274.
Name	Click a resource's name to access the resource profile.
Personnel Status	Displays the resource's personnel status if you allow non-employees to be established as resources.
Job Title	Displays the resource's current job as defined on the Employee Data - Employee Job page.
Bill Rate	Displays the resource's bill rate and currency. This information is derived from the rate that you define for the resource's employee ID. If you don't define a bill rate for the employee ID, the system defines this value by the rate that is associated with the job code in the PeopleSoft Project Costing application table, if one exists.
Location	Displays the resource's location as specified on the Employee Data - Employee Job page.

Supervisor

Displays the name of the resource's manager.

Assign

Click to access the Assign Resource page and create an assignment for the selected resource. Save or cancel the assignment to return to this page. When you return to this page, the Assign button is no longer active for the assigned resource.

If you are express searching to fill a generic resource placeholder in PeopleSoft Program Management, you do not access the Assign Resource page when you click Assign. Instead, a message appears stating that the generic resource will be replaced by the named resource. If Assignment Approval workflow is activated, the message indicates that the generic resource will be replaced by the named resource after the assignment is approved. Click OK for the system to create the assignment and return to the Resources page in PeopleSoft Program Management. Click Cancel to cancel the action and return to the Express Search page.



Click to access the resource's monthly schedule and view schedule details.

Consider

Click to move the selected resources to the Considering grid to temporarily hold them aside while you keep searching. You can change search criteria and perform as many iterative searches as required during this Express Search session. Continue to place each viable candidate in the Considering grid until you are ready to make a decision.

Create Service Order

Click to create a service order and populate it with the requirement dates, qualifications, and keywords that you specify on the Express Search page. This link transfers you to the Resource Request page on the new service order. If any resources are in the Considering grid, they appear on the resource request as recommended resources.

The link is not visible if you are express searching to fill a generic resource placeholder in PeopleSoft Program Management.

Considering Resource Candidates

Resources appear in the Considering grid if you select the resource in the Search Results grid and click Consider. This enables you to keep one or more resources in consideration as you adjust search criteria and perform iterative searches. The fit scores for each resource in the Considering grid are recalculated for each subsequent search that you perform in this Express Search session to reflect the current search criteria.

Considering							Customize Find View All			First	1-2 of 2	Last
Name	Personnel Status	Job Title	Bill Rate	Location	Supervisor							
Marcus Tomas	Non-Employee	Busn Anly		Quebec, QC, CAN	George Lane	Assign						
Scooter Evans	Non-Employee	Senior Con		Las Vegas, NV, USA	George Lane	Assign						

Considering grid on the Express Search page

In the Considering grid, you can:

- Delete rows for the resources who are no longer under consideration.

- Select Assign on a resource row to create an assignment for the resource. Save or cancel the assignment to return to this page.
- Select Create Service Order to create a service order and include the resources in this grid as recommendations for the resource request on the service order.

CHAPTER 22

Requesting Resources Using Service Orders

This chapter provides an overview of service orders and discusses how to:

- Create and modify service orders.
- Create service orders from templates.
- View and manage service orders and resource requests.

Understanding Service Orders

In PeopleSoft Resource Management, you can request services for a customer using a service order. The service order form captures information about the engagement and includes one or more resource requests. The resource request section of a service order captures data that is needed to find qualified resources to work on the engagement. Each resource request can have a unique set of skill and date requirements. You can request multiple resources on a single resource request, provided that the same requirements apply for each. Resource Matching uses the specifications in the service order and resource request to search for available, qualified resources.

This section lists prerequisites and discusses:

- The service order form.
- Service order and resource request status.
- Service order templates.
- Service order workflow.

Prerequisites

Complete these steps before you work with service orders:

- Set up customers and contacts.

See *PeopleSoft Working Customers and Orders 8.8 PeopleBook*.

- Define service order priorities.

See [Chapter 15, “Enabling Service Orders,” Defining Service Order Priorities, page 154.](#)

- (Optional) Define service order default values.

See [Chapter 15, “Enabling Service Orders,” Defining Service Order Defaults, page 155.](#)

- (Optional) Create qualification profiles.

See [Chapter 15, “Enabling Service Orders,” Creating Qualification Profiles, page 157.](#)

- (Optional) Create service order templates.

See [Chapter 15, “Enabling Service Orders,” Creating, Updating, and Deleting Service Order Templates, page 162.](#)

The Service Order Form

The service order form consists of two tabs—Requests and Order Summary. The Requests tab contains the details of each resource request on the order. The Order Summary tab contains header information, a summary of the requests, and links to other service order options.

Creating a service order enables you to:

- Capture customer resource requirements that you can fulfill at a later time.
- Capture customer resource requirements that a different user can fulfill.
- Provide an audit trail of customer orders that you can analyze to track metrics.

When you first access the service order form, specify the dates, and qualifications or keywords, that Resource Matching uses to find the best resources for the job. You can define project team requirements by creating a resource request for each project role, and you can request multiple resources to fulfill a role.

When you’re ready to finalize the order, enter additional details about the project and customer, and identify the organization and person that are responsible for fulfilling the order.

As the order proceeds through the approval and fulfillment processes, use the form to:

- Review fulfillment progress and the assigned resources.
- Capture additional information or customer requirements for the order.
- Review an order for completeness and understand the requirements prior to processing.

Service Order and Resource Request Status

Service order status indicates where the order is in the fulfillment process. The system automatically updates status based on the fulfillment progress of the associated resource requests; you can change the status manually at any time.

This table lists the service order status values that specific actions or processes trigger:

Service Order Status	Triggering Action or Process
Draft	Click the Save for Later button on the Resource Requests or Order Summary tab. Use this option to save a service order to return to at a later time if all of the required fields aren’t entered or the order is not ready for submission.
New	Click the Save and Submit button on the Order Summary tab. Use this option to save a new service order that is ready for submission to the person who is responsible for staffing to begin the fulfillment process.

Service Order Status	Triggering Action or Process
Open	Manually change the status to <i>Open</i> . Use this status to indicate that you no longer consider an order to be in <i>New</i> status (for example, if you have reviewed it but have not yet made assignments).
In Process	Create an assignment in any status for at least one resource request on this service order.
Canceled	Cancel all resource requests on a service order. This action automatically cancels the service order. Use this status to indicate that the customer canceled their order for services. Note. You cannot cancel a service order that is in a <i>Draft</i> status. You can delete a <i>Draft</i> service order using the Delete Service Order page.
Closed	- Create assignments with a status of <i>Assigned</i> to fulfill all of the resource request quantities on this service order. - Cancel the last open resource request on a service order that contains other resource requests that are in a <i>Closed</i> status. This action automatically closes the service order.

A resource request status indicates where the individual request is in the fulfillment process. The system updates status automatically based on fulfillment progress; you can change the status manually at any time.

This table lists the resource request status values that specific activities or processes trigger:

Resource Request Status	Triggering Action or Process
Open	Create a new resource request.
Canceled	- Manually change the resource request status to <i>Canceled</i>. - Cancel the service order for this resource request if there are no assignments associated with the request. This action automatically cancels the resource request. - Remove or cancel a generic resource that is associated with this resource request from the Resource page or Manage Generic Resources page in PeopleSoft Program Management. This action automatically cancels the resource request.
Closed	- Create assignments with a status of <i>Assigned</i> to fulfill the quantity of resources who are requested on this resource request. - Manually change the resource request status to <i>Closed</i>.

Service Order Templates

Service order templates reduce the amount of work that is required to create a service order by prepopulating many of the field values that are needed to create a new service order. You can create one or more standardized service order templates to use where similar or repetitive projects must be staffed.

Service order templates populate fields on both service order tabs—Requests and Order Summary. A template may also include multiple resource request lines.

Information that is stored on service order templates automatically populates new service orders when you use this option. You can then modify any default values or enter additional information as needed.

Service Order Workflow

Workflow options for service order processing or notification messages are specified for the business unit during implementation. If workflow options are enabled for the business unit, these actions may occur:

- When a service order is submitted, a notification of a new service order is routed to the worklist of the person who is identified on the service order as responsible for staffing the order.
- If the person who is responsible for staffing the order changes, a notification of the service order is routed to the worklist of the new responsible person. An email notification of the changed service order is also sent to the new responsible person.
- Each time the service order status changes, the system sends an email notification to the person who is responsible for staffing the order (unless that is the person who made the change) and to the interested parties who are listed on a service order.

Creating and Modifying Service Orders

This section discusses how to:

- Define resource requests.
- Specify qualifications and notes.
- Specify keywords.
- Enter order summary information.
- Define owning organizations.
- Access additional service order options.
- Add additional resource request information.
- Enter multiple date ranges on resource requests.
- Change locations or contacts.
- Recommend resources.
- Save service orders.

Pages Used to Create and Modify Service Orders

Page Name	Object Name	Navigation	Usage
Resource Requests	RS_SO_REQUESTS	Resource Management, Resource Requests, Create or Review Service Order, Resource Requests	Specify the required dates, qualifications, and keywords to use when searching for resources to fulfill service orders.
Resource Qualifications - Select Qualification Profile	RS_SELQUALPROFILE	- Click Profile on the Resource Requests page. - Click Profile on the Express Search page.	Specify resource qualifications from existing qualification profiles.
Resource Qualifications - Search for Qualifications	RS_QUALIF_SRCH	- Click List on the Resource Requests page. - Click List on the Express Search page.	Specify resource qualifications from a list of qualifications.
Resource Qualifications - Select Competencies	RS_SO_COMP	- Click Competency Tree on the Resource Requests page. - Click Competency Tree on the Express Search page.	Pick resource qualifications from the Competency tree.
Qualification Detail: <Qualification>	RS_QUALIF_DETAILS	Click Details on the Qualifications grid.	Specify additional details about requested license, language, or single-value flexible attributes.
Order Summary	RS_SO_SUMMARY	- Select the Order Summary tab on the Resource Requests page. - Click Complete Order on the Resource Requests page.	Enter customer, project, and organizational information for service orders.
Service Order Owning Organization - Select an Organization	RS_ORGTREESEL_SEC	Click Owning Organization on the Order Summary page. Click Advanced Search or Basic Search.	Select organizations that are responsible for delivering services.
Service Order - Interested Parties	RS_SO_INT_PARTY	Click Interested Parties on the Order Summary page.	Enter people to be notified if service order statuses change and workflow is enabled.
Service Order - Service Order History	RS_SO_HIST_SEC	Click Order Comments and History on the Order Summary page.	Review or add comments that are specific to service orders.
Customer Information	RS_CUST_INFO1	- Click Location Details on the Order Summary page. - Click Location Details on the Service Order - Location and Contact Details page.	View customer profiles. Modify PeopleSoft Resource Management-specific information on customer profiles.

Page Name	Object Name	Navigation	Usage
Contact Profile	RS_CONTACT_INFO1	- Click Contact Details on the Order Summary page. - Click Contact Details on the Service Order - Location and Contact Details page.	View information about customer contacts.
Service Order - Additional General Information	RS_SO_SUMM_MORE	Click Additional Information for a specific resource request on the Order Summary page.	Enter desired values for flexible resource attributes that are specific to the resource request line.
Service Order - Detailed Date Ranges	RS_SO_DETAILDATES	Click Use Multiple Date Ranges for a specific resource request on the Order Summary page.	Define additional date ranges if the specified request is for resources to work in noncontiguous intervals.
Service Order - Location and Contact Details	RS_REQ_LOCCNTC_SEC	Click Change Location/Contact Information for a specific resource request on the Order Summary page.	Enter location and contact information that is specific to the resource request line.
Service Order - Recommend Resources	RS_SO_RECOMMEND	Click Recommend Resources for a specific resource request on the Order Summary page.	Recommend resources for the specified resource request.

Defining Resource Requests

Access the Resource Requests page.

Resource Requests | **Order Summary**

Service Order ID: 0000000005 **Entered by:** Kenneth Schumacher **Date:** 11/12/2003

Customer: CAN04 Western Hospitals of Canada

Resource Request Find | View All First 1 of 1 Last

Project Role: Current Project Manager **Quantity:** 3 0 of 3 Assigned **Status:** Open

Description: Manage software install projec

Start Date: 06/30/2004 **End Date:** 12/23/2004 [View Multiple Date Ranges](#)

Days of work: 105 **Late Start Date:** 06/30/2004

☐ Partial Days Acceptable ☐ Trainees Allowed

Qualifications | Keywords | Notes

Type	Importance	Description	Years of Work Experience	Proficiency
1 Competency	Desired	PeopleCode	1 Year	3-Good
2 Competency	Required	Project Management	3 Years	3-Good

Add qualifications from: Profile List Competency Tree

Save Complete Order Save As

Resource Requests page

The service order business unit that you select on the Add a New Value page when you first enter this component controls:

- Workflow.
- The list of projects and customers that you can select for the order.

The default values that appear on the Resource Request page are based on service order default values and the origin of the service order. For example:

- If you create a service order from the Express Search feature, the specified dates, qualifications, and keyword values appear on the Resource Requests page.

In addition, resources who are in the Considering grid on the Express Search page when the service order is created are associated with this request as recommended resources.

- If you create a service order from the Manage Generic Resources page in PeopleSoft Program Management, the values for primary project role, quantity, description, and date range appear on the Resource Requests page.

Order description and project appear on the Order Summary page.

Your ability to edit fields or select certain field values is based on your user role and the origin of the service order.

Service Order

Displays the service order ID that you entered or that the system autogenerated. Autogenerated values appear as *NEXT* until you save the assignment.

Note. All service order IDs and service order template IDs must be unique.

Entered by and Date Displays the name of the user who creates the order and the system date on which the user created it.

Customer Select the customer who is requesting the services. The customer must be defined with a valid customer ID.

Note. If PeopleSoft Contracts is not installed or if no project is entered on the service order, the customer prompt table shows a list of customers who are associated with the setID for the service order business unit. If you enter a customer ID first and then enter a project ID, and that project is not affiliated with the customer through a contract, the system issues a warning message at save time. This warning reminds you that the selected customer is not associated with the project that was selected for the service order.

Resource Request

Project Role Enter the position that is to be filled on this resource request.

If the resource request is created in PeopleSoft Program Management, the primary project role populates this field and is not editable.

Quantity Enter the total number of resources who are required to fulfill the resource request. This is the number of resources that you require on the same dates with the same skill set.

This field is not editable if the value is populated from PeopleSoft Program Management.

After you submit a service order, the fulfillment progress appears beside the Quantity field. For example, if you request two resources, upon submission the fulfillment progress appears as *0 of 2 Assigned*; the system updates this value when you assign resources.

Status Displays where the individual resource request is in the process of being fulfilled. The system automatically updates the status based on fulfillment progress; you can change it manually at any time.

When you submit a service order, the resource request status becomes *Open*. This field is visible only after you submit a service order.

See [Chapter 22, “Requesting Resources Using Service Orders,” Service Order and Resource Request Status, page 298.](#)

Description Enter a description of the resource request in 30 characters or fewer. This description is used in other parts of the system to identify the request.

Start Date and End Date Enter the dates that the assignment is expected to start and end. Click the calendar next to the start and end dates to select those dates. You can enter the start date and days of work and the system calculates the end date.

If you require the resources on a single resource request to work in noncontiguous intervals, you can add additional date ranges for this request on the Order Summary page. If you enter multiple date ranges, the start

date that appears on the Resource Request page is the earliest start date of all date ranges, and the end date is the latest end date.

Start date, end date, and days of work are required to submit a service order for fulfillment. The resource request start date, end date, and days of work are used by the Resource Match engine to find available resources.

Days of work

Enter the number of work days that are required to complete the job. If you enter start and end dates but not the days of work, the *Days of work* default value is the number of work days between the start and end dates.

You can use dates and days of work to indicate a date range that is longer than the estimated days of work. For example, you can specify start and end dates that are three months apart and enter days of work as *30*, indicating that the thirty-day job can be completed at any time during those three months.

Late Start Date

Displays the latest date that the resource can start the assignment and still complete it by the end date. The system calculates this field based on the end date and days of work values.

Partial Days Acceptable

Click if part-time work is acceptable on this project. This option impacts Resource Matching because it indicates that the resource is not required to have a full day available every day to be considered a strong fit for the request. As such, the Resource Match engine evaluates part-time resources, and the Availability fit scores of partially available resources are higher than they would be if you don't select this check box.

Trainees Allowed

Click if trainees are acceptable on this project. These are resources who are typically observing the resource who is assigned to a project for evaluation purposes. This field is used for informational purposes only.

Complete Order

After you specify qualifications, keywords, and notes, click Complete Order to proceed to the Order Summary page and enter project, customer, and organization details.

Specifying Qualifications and Notes

Select the Qualifications tab on the Resource Request page to specify the desired accomplishments, competencies, and flexible qualification factors for the requested resource. You can specify qualifications based on a predefined qualification profile, look up specific qualifications from a list, or select competencies from the Competency tree. The Resource Match engine uses qualifications to find qualified resources.

Select the Notes tab to enter additional comments for this request. These comments are used for information only.

Specify qualifications on the resource request as you do on the Express Search page.

See [Chapter 21, “Express Searching for Resources,” Specifying Qualifications, page 285](#).

Specifying Keywords

Select the Keywords tab on the Resource Request page to specify keywords as resource requirements.

The system administrator creates and routinely refreshes a Verity search index of work experience and resume document information for all available resources. The index is used to calculate the individual Work Experience and Resume factor fit scores, which are included in the calculation of the Qualifications factor family fit score.

Enter specific keywords here that you can use as a search string to compare against free-form text within the resource's work experience and resume document attachment on the resource profile. This option is best used in cases where the competency information is insufficient or not consistently maintained, or when you want to specify skill requirements that are not listed as competencies or accomplishments.

Specify keywords on the resource request as you do on the Express Search page.

See [Chapter 21, “Express Searching for Resources,” Entering Keywords, page 291.](#)

Entering Order Summary Information

Access the Order Summary page.

Resource Requests **Order Summary**

Service Order ID: 0000000005 **Entered by:** Kenneth Schumacher **Date:** 11/12/2003

Status: New

Order Information

Order Description: ESA software install project

Customer: CAN04 Western Hospitals of Canada

Project: 0000000157 ESA software install project

[Create a Project](#)

Location: Main [Location Details](#)

Contact: [Contact Details](#)

Owning Business Unit: CAN01 GBI BU for Canada

Owning Organization: Consulting Corp

***Priority:** MEDIUM

Responsible For Staffing: Schumacher, Kenneth

[Interested Parties](#) [Order Comments and History](#) [E-Mail Partner](#)

▼ Resource Requests in this Order Find | View All First 1 of 1 Last

1	PROJ MANAGER	Manage software install projec	Open	Additional Information View Multiple Date Ranges Change Location / Contact Information Recommend Resource
6/30/2004 to 12/23/2004 for 105 days. 3 resource(s) needed.				
Required:	Project Management			
Desired:	PeopleCode			

[Save](#) [Save As](#)

Order Summary page

Status

This field is visible only after you submit a service order. It indicates where this service order is in the process of being fulfilled. The system automatically updates status based on fulfillment progress; you can change the status manually at any time.

When you submit a service order, the status becomes *New*.

See [Chapter 22, “Requesting Resources Using Service Orders,” Service Order and Resource Request Status, page 298.](#)

If you change the status, and service order workflow is activated for the business unit, upon saving the service order the system sends an email notification message to the person who is responsible for staffing the order (unless that is the person who made the change) and to interested parties who are listed on the service order.

Order Information

Order Description

Enter a description of the service order in 60 characters or fewer.

Customer

Enter the customer who is associated with this service order, if applicable. You can enter only one customer per service order. Values appear from the Resource Requests page and can be changed.

Project

Enter a valid project ID.

This field is not editable if the value is populated from the Manage Generic Resources page in PeopleSoft Program Management.

Create a Project

Click to access the Create A New Project page. On this page enter:

- A new project ID, or accept the default value of *NEXT* to create a project with the next available project ID.
- Enter project start and end dates that at least span the date ranges of resource requests on this order. The current date is the default value in both fields.

Click OK on the Create A New Project page to save the project and return to the Order Summary page. The new project ID value appears as the Project field value on the service order. The service order business unit and description become the business unit and description on the project.

Location

Enter the customer's location where the work takes place.

Location Details

Click to access the customer profile and view or update housing and travel information, dress code, and whether the customer allows trainees on assignments.

Contact

Enter the customer's contact person for this order.

Contact Details

Click to access the contact profile and view customer contact information, such as telephone number and email address.

Owning Business Unit

Enter the human resource (HR) business unit of the owning organization for the service order. Your selection determines the organizational unit tree from which you can select the owning organization for this service order.

Define the default value for each user on the Service Order Defaults for <User> page.

Owning Organization

Click the Select an Organization icon to access the Service Order Owning Organization - Select an Organization page. Here you select the organization that is responsible for delivering the services that are requested on the service order. When working to fulfill the order, users can direct the search to resources within the owning organization that is specified on the order.

Note. You cannot type the Owning Organization field value—you must select it from the organizational unit tree on the Service Order Owning Organization - Select an Organization page.

Define the default value for each user on the Service Order Defaults for <User> page.

See [Chapter 22, “Requesting Resources Using Service Orders,” Defining Owning Organizations, page 309.](#)

Priority

Enter the service order’s importance or urgency. The default priority value is established at implementation.

Priority is used for information and reporting purposes only.

Responsible For Staffing

Enter the individual who is responsible for staffing the service order. When the service order is submitted, the resource requests on the order appear on the Staffing Workbench - Fulfill Orders page for the user who is identified as responsible for staffing the order. If service order workflow is activated for the business unit, the service order is routed to this person’s worklist when the order is submitted.

Define the default value for each user on the Service Order Defaults for <User> page.

This field is required to submit a service order for fulfillment.

Interested Parties

Click to access the Service Order - Interested Parties page.

See [Chapter 22, “Requesting Resources Using Service Orders,” Accessing Additional Service Order Options, page 310.](#)

Order Comments and History

Click to access the Service Order - Service Order History page.

See [Chapter 22, “Requesting Resources Using Service Orders,” Accessing Additional Service Order Options, page 310.](#)

E-Mail Partner

Click to access the E-Mail Partner page.

See [Chapter 22, “Requesting Resources Using Service Orders,” Accessing Additional Service Order Options, page 310.](#)

Resource Requests in this Order

This collapsible scroll area displays the project role, description, start and end dates, quantity, status, and qualifications for each resource request on the order. You can add a resource request on this page; return to the Resource Requests page to enter the detailed requirements.

Additional Information

Click to access the Service Order - Additional General Information page.

See [Chapter 22, “Requesting Resources Using Service Orders,” Adding Additional Resource Request Information, page 313.](#)

View Multiple Date Ranges

Click to access the Service Order - Detailed Date Ranges page.

See [Chapter 22, “Requesting Resources Using Service Orders,” Entering Multiple Date Ranges on Resource Requests, page 313.](#)

Change Location/Contact Information

Click to access the Service Order - Location and Contact Details page.

See [Chapter 22, “Requesting Resources Using Service Orders,” Changing Locations or Contacts, page 314.](#)

Recommend Resource

Click to access the Service Order - Recommend Resources page.

See [Chapter 22, “Requesting Resources Using Service Orders,” Recommending Resources, page 314.](#)

Generic Resource Name: <resource name>

Click to access the Resources page in PeopleSoft Program Management and view the project resource list. This link appears if the resource request is associated with a generic resource placeholder in PeopleSoft Program Management.

Defining Owning Organizations

You can select the owning organization by executing a basic or advanced search.

Selecting Owning Organizations Using a Basic Search

Access the Service Order Owning Organization - Select an Organization basic search page.

Service Order Owning Organization
Select an Organization

[Advanced Search](#)

Select an Organization

Left | Right

- CONSULTING CORP - Consulting Corp
 - HUMAN RESOURCES - Human Resources
 - INFORMATION SERVICES - Information Services
 - [11000 - Information Services]
 - PUBLIC RELATIONS - Public Relations
 - AUDITING - Auditing
 - ADMINISTRATION - Administration
 - BUSINESS SERVICES - Business Services
 - SALES AND SERVICES - Sales and Services
 - SERVICES - INDUSTRY - Services - Industry
 - NO-DEPTID - No Department

Selected Organization: Information Services

OK Cancel Refresh

Service Order Owning Organization - Select an Organization basic search page

Select an Organization

Expand the tree as needed to identify the desired default owning organization, and then select the organization.

You can select any level on the tree to serve as the default owning organization.

- Selected Organization

Displays the name of the organization selected. You can select only one owning organization.
- Advanced Search

Click to access the Service Order Owning Organization - Select an Organization advanced search page.

Selecting Owning Organizations Using an Advanced Search

Access the Service Order Owning Organization - Select an Organization advanced search page.

Service Order Owning Organization

Select an Organization

Basic Search

Search for Organizations

Search for an organization by entering all or part of the organization name in the box below and then clicking on the "Find" button. Wild card characters (* or %) can be used. All searches are case sensitive

Find Organizations Like:

Select an Organization

Customize | Find | View All |

First 1-2 of 2 Last

Sel	Name
☐	Manufacturing Line of Business
☒	Manufacturing Support

Selected Organization: Manufacturing Support

OK

Cancel

Refresh

Find

Select

Service Order Owning Organization - Select an Organization advanced search page

- Find Organizations Like

Enter all or part of an organization name using a wildcard—% or *—if necessary. The search is case sensitive.

Enter only % or * to return a list of all organizations for the specified business unit.
- Find

Click to generate the search. The organizations that match the search criteria appear on the page.
- Sel (select)

Enter the desired default owning organization.
- Select

Click for the selected organization name to appear as the selected organization on this page.
- OK

Click to select the organization and return to the previous page.

Accessing Additional Service Order Options

The service order form provides links to additional tools to assist you in managing service orders. This section discusses:

- Notifying interested parties of service order status changes.
- Entering order comments or view history.
- Emailing partners.

Notifying Interested Parties

Access the Service Order - Interested Parties page.

Service Order

Interested Parties

	Name		
1	Siino,Gina	🔍	+ -
2	Johnson,Holly	🔍	+ -
3	Anderson,Dylan	🔍	+ -

Service Order - Interested Parties page

Name Add or remove individuals to notify of any changes to the service order's status if workflow is enabled.

Entering Order Comments and Viewing History

Access the Service Order - Service Order History page.

Service Order

Service Order History

The information below contains the history of this service order.

Comments/Billing Information				
Last Upd DtTm	Name	Comments		
11/12/2003 7:46:44PM	Schumacher,Kenneth	Updated history comments		+ -

Service Order Priority			
Last Upd DtTm	Name	Priority	Description
11/12/2003 7:46:44PM	Schumacher,Kenneth	MEDIUM	Changed priority to medium

Service Order Status			
Last Upd DtTm	Name	Status	Description
11/12/2003 7:46:44PM	Schumacher,Kenneth	Draft	Saved draft to submit later

Service Order Owning Organization			
Last Upd DtTm	Name	Owning Organization	Description
11/12/2003 8:24:47PM	Schumacher,Kenneth	CONSULTING CORP	Consulting Corp

Service Order - Service Order History page

Use this page to record and track comments about this service order and review the history of changes to priority, status, and owning organization.

Last Upd Dt Tm (last updated date and time)

Displays the date and time of the update.

Name

Displays the name of the user who entered the update.

Comments/Billing Information

View, add, or delete comments or billing information.

Service Order Priority

View the history of service order priority changes and, if required, add further explanation for the changes.

Service Order Status

View the history of service order status changes and, if required, add further explanation for the changes.

Service Order Owning Organization

View the history of service order owning organization changes and, if required, add further explanation for the changes.

Emailing Partners

Access the E-mail Partner page.



E-mail Partner

Enter the Partner E-mail ID.

Email ID: Elaine_Wilson@PeopleSoft.com

OK Cancel

E-Mail Partner page

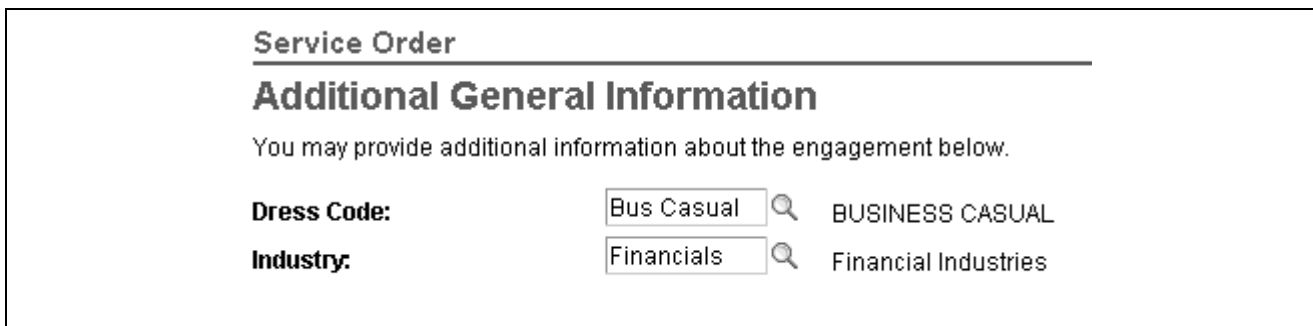
Email ID

Enter an email address to email the service order to an external partner requesting assistance in fulfilling the resource request. The partner does not have to be classified as an external staffing source within PeopleSoft Resource Management. Once you enter the email address, the system creates the memo and includes information about all of the resource requests on the service order within the text of the message.

To outsource a single resource request, click Save As to copy the original service order and delete all nonrelevant resource requests before sending the email.

Adding Additional Resource Request Information

Access the Service Order - Additional General Information page.



Service Order

Additional General Information

You may provide additional information about the engagement below.

Dress Code: Bus Casual  BUSINESS CASUAL

Industry: Financials  Financial Industries

Service Order - Additional General Information page

Enter values for any flexible service order attributes or flexible preference factors that are established for your organization. Define optional flexible attributes during implementation.

Entering Multiple Date Ranges on Resource Requests

Access the Service Order - Detailed Date Ranges page.

Service Order

Detailed Date Ranges

Business Unit:

CAN01

Service Order ID:

0000000005

Request Line:

1

Description:

Manage software install projec

Enter the periods of time you would like the resource to work.

Earliest Start Date:

06/30/2004

Latest End Date:

12/23/2004

Date Ranges

Customize | Find |  First  1-2 of 2  Last

	Start Date	End Date		
1	06/30/2004 	8/31/2004 	+	-
2	10/1/2004 	12/23/2004 	+	-

Service Order - Detailed Date Ranges page

Use this page to define additional date ranges if the request is for resources to work in noncontiguous intervals. For example, if the date range that is specified on the Resource Request page is January 1 to January 31, and you also need the resource from March 1 to March 31, add a row and enter the second date range.

Start Date and End Date Enter the start and end date for each unique date range on this resource request. Add additional rows as required.

Changing Locations or Contacts

Access the Service Order - Location and Contact Details page.

Use this page to select a different location or contact that only applies to this individual resource request line.

Recommending Resources

Access the Service Order - Recommend Resources page.

Service Order

Recommend Resources

Recommended Resources

Name	Entered on	Name	Comments	
Schumacher,Kenneth	11/12/2003	Evans,Scooter 	OK to travel 	+
Schumacher,Kenneth	11/12/2003	Wong,David 	Language 	+

Service Order - Recommend Resources page

Use this page to recommend resources for this resource request. The Resource Match engine evaluates recommendations when it calculates fit scores. You can also view recommended resources on the Staffing Workbench - Fulfill Orders tab to assist you in making staffing decisions.

Resources who were previously recommended for this resource request appear on the page.

Name and Entered on	Displays the name of the person who is making the recommendation and the date on which that person entered it.
Name and Comments	Enter a resource to recommend for this resource request, and add comments to explain the recommendation. Add rows as necessary to recommend additional resources.

The system sends a worklist item to the resource as a notification that the resource is recommended for a resource request.

Saving Service Orders

There are three ways you can save service orders in PeopleSoft Resource Management:

Save for Later	Click to save a service order in a <i>Draft</i> status if the service order is not ready for submission. The only field values that are required to save a draft service order are service order ID and business unit. You can open, update, and click Save for Later as many times as required. This option is available only until you submit the service order.
Save and Submit	Click to save a service order and submit it to the person who is responsible for staffing the order so that the person can begin the fulfillment process. When you submit the service order, the resource requests on the order appear on the Staffing Workbench - Fulfill Orders page for the user who is identified as responsible for staffing the order. If service order workflow is activated for the business unit, the service order is routed to this person's worklist when you submit the order. To submit a service order it must have an owning business unit, owning organization, and person responsible for staffing, and each resource request must have a start date, end date, and days of work. You must also specify at least one keyword or one qualification on every resource request in the order. This button is available only until you submit the service order; after that, this button is replaced with the Save button.
Save	Click to save a service order after you modify it. If you changed the service order status and service order workflow is activated for the business unit, the system sends an email notification to the person who is responsible for staffing the order (unless that is the person who made the change) and to the interested parties who are listed on a service order. This option is available only after you submit the service order.
Save As	Click to save the resource request and service order information to a new service order number. This speeds the entry of a new service order that contains similar data as the original. When the save is complete, the new service order opens in a new browser window.

This option is available only after you submit the service order.

Creating Service Orders from Templates

This section discusses how to create service orders from templates.

Page Used to Create Service Orders from Templates

Page Name	Object Name	Navigation	Usage
Create Service Order From Template	RS_SO_PICKTMPLT	Resource Management, Request Resources, Create Svc Order from Template, Create Service Order From Template	Create new service orders using field values from predefined templates.

Creating Service Orders from Templates

Access the Create Service Order From Template page.

Create Service Order From Template

Please select a Service Order template from the following list.

Service Order Template

Customize | Find | View All |

First 1-10 of 19 Last

Business Unit	Service Order Template ID
CAN01	CORE FIN
US001	AP
US001	AR
US001	GL
US001	LA BIKE
US003	CA
US003	HEXCEL
US003	PC
US003	RS
US004	CORE FIN

Create Service Order From Template page

- Business Unit

Displays the business unit that is associated with the template.
- Service Order Template ID

Select the template to populate a new service order form. The system copies all of the information from the template to the service order. You can modify the new service order field values without affecting the template.

Viewing and Managing Service Orders and Resource Requests

PeopleSoft Resource Management provides additional tools to help you view and manage service orders. This section discusses how to:

- View assigned resources.
- Review service orders.
- Delete service orders.

Pages Used to View and Manage Service Orders and Resource Requests

Page Name	Object Name	Navigation	Usage
Order Summary	RS_SO_SUMMARY	Resource Management, Request Resources, Create or Review Service Order, Order Summary	View assigned resources for resource requests and drill down to assignments or resource profiles.
Delete Service Order	RS_SO_DELETE	Resource Management, Resource Requests, Delete Service Order, Delete Service Order	Delete service orders.

Viewing Assigned Resources

Access the Order Summary page - Resource Requests in this Order collapsible scroll area.

▼ Resource Requests in this Order					Find View All	First	1 of 1	Last
1	PROJ MANAGER	Manage software install projec	Open		Additional Information	+	-	
		6/30/2004 to 12/23/2004 for 105 days. 3 resource(s) needed.			View Multiple Date Ranges			
Required:	Project Management				Change Location / Contact Information			
Desired:	PeopleCode				Recommend Resource			
Assigned Resources								
	Assignment Status	Resource Name	Personnel Status	Start Date	End Date			
1	Pending Approval	Armand Falkner	Employee	06/30/2004	12/23/2004			
2	Interviewing	Patricia Morse	Employee	06/30/2004	12/23/2004			
3	Proposed	Brian O'Brein	Employee	06/30/2004	12/23/2004			
4	Reserved	Savannah Rogers	Employee	06/30/2004	12/23/2004			

Resource Requests in this Order collapsible scroll area on the Order Summary page

In the Assigned Resources grid, you can view the resources who are assigned to this resource request and drill down to the assignment and the resource profile.

Assignment Status

Click the status to access the Assign Resource page and view the details of the assignment.

Resource Name	Click the resource name to view the resource's profile. See Chapter 18, "Maintaining Resource Profiles," page 211.
Personnel Status	Displays the resource's personnel status of <i>Employee</i> or <i>Non-Employee</i> .
Start Date and End Date	Displays the start and end dates of the assignment. If multiple date ranges are indicated on the assignment, these columns display the earliest start and latest end dates of those indicated date ranges.

Reviewing Service Orders

Access the Order Summary page.

Resource Requests

Order Summary

Service Order ID: 0000000005

Entered by: Kenneth Schumacher

Date: 11/12/2003

Status: In Process

Order Information

Order Description: ESA software install project

Customer: CAN04 Western Hospitals of Canada

Project: 0000000157 ESA software install project

Create a Project

Location: Main

Contact: [Contact Details](#)

Owning Business Unit: CAN01 GBI BU for Canada

Owning Organization: Consulting Corp

Priority: MEDIUM

Responsible For Staffing: Schumacher,Kenneth

[Interested Parties](#)
[Order Comments and History](#)
[E-Mail Partner](#)

▼ Resource Requests in this Order

Find | View All First 1 of 1 Last

1

PROJ MANAGER Manage software install projec Open

6/30/2004 to 12/23/2004 for 105 days. 3 resource(s) needed.

Additional Information

View Multiple Date Ranges

Change Location / Contact Information

Recommend Resource

Required: Project Management

Desired: PeopleCode

Assigned Resources

	Assignment Status	Resource Name	Personnel Status	Start Date	End Date
1	Pending Approval	Armand Falkner	Employee	06/30/2004	12/23/2004
2	Interviewing	Patricia Morse	Employee	06/30/2004	12/23/2004
3	Proposed	Brian O'Brein	Employee	06/30/2004	12/23/2004
4	Reserved	Savannah Rogers	Employee	06/30/2004	12/23/2004

Order Summary page

Note. The service order appears in read-only mode if you do not have security access to update service orders.

On this page you can view (not update) service order, resource request, and assignment information.

Deleting Service Orders

Access the Delete Service Order page.

Delete Service Order

Service Order ID: 0000000005

Service Order Date: 11/04/2003

Customer ID: JPN05 Tokyo Wholesale Suppliers

Project: IMPLEMENT06 Implementation

Entered by: SAMPLE Theresa Monroe

If you would like to delete this service order, check the delete box below and click on save

☒ **Delete**

Delete Service Order page

You can delete service orders only in a status of *New* or *Draft*.

Warning! Only system administrators should have permission to delete service orders. Delete a service order with caution. PeopleSoft Resource Management does *not* provide any embedded checking mechanisms to make sure that there are no assignments for a service order before you delete it, resulting workflow to notify the service order owner that the deletion occurred, checking mechanisms to find bids or recommendations that may be associated with the service order, or workflow to notify the owner or interested parties that a bid or recommendation is no longer valid because the service order was deleted.

Customer ID	Displays the ID and name of the customer who is associated with this service order.
Project	Displays the project ID and description that is associated with this service order.
Entered by	Displays the user ID and name of the person who entered the service order.
Delete	Click to delete this service order.
Save	Deletes the service order. A message appears confirming that the service order was deleted. Click OK to close the dialog box.

Use the folder navigation to return to the Delete Service Order search page to delete another service order.

CHAPTER 23

Fulfilling Service Orders

This chapter provides an overview of service order fulfillment using the Staffing Workbench and discusses how to:

- Specify Staffing Workbench and service order fulfillment options.
- Fulfill open resource requests.

Understanding Service Order Fulfillment Using the Staffing Workbench

The Staffing Workbench - Fulfill Orders page is a one-stop shop for managing the order fulfillment process. Here you can review the current queue of orders that are assigned to you for fulfillment, identify those orders that require your attention, and perform a variety of tasks to find qualified resources to fulfill them. On the Fulfill Orders page, you can:

- View the current queue of outstanding resource requests to fulfill.
 - View resource requests in a list or Gantt chart format.
 - Dynamically filter the requests on the page by their fulfillment progress.
 - Select one or more resource requests to process, and filter the view to display only those requests.
 - Add resource requests that are assigned to another staffing coordinator to the workbench.
- Search for resources to fulfill requests.
 - Perform a search using the Resource Match engine.

You can specify the search options, such as resource group and personnel status, that define the pool of resources for the Resource Match engine to evaluate when searching for suitable resources to fulfill the resource requests that appear in the work space. If you don't find suitable resources, you can change the search options on the fly and search again.

You can specify the search settings, such as the relative importance of factor family fit scores and the maximum number of candidates to review, for the Resource Match engine to use when looking for resources who fit the requirements on a resource request.

- View resources who are recommended or who have submitted bids for resource requests.
- Select resources to appear as candidates for a resource request in the work space.
- If you use the Resource Optimization feature, view optimized resources for selected requests, and assign optimized resources to one or more listed resource requests.

- If you use PeopleSoft Services Procurement, initiate and track a service requisition to search for third-party service providers to fulfill a resource request.
- Evaluate candidates and select resources to assign, consider, interview, propose, or reserve for specific resource requests.

Workbench Tools used to Evaluate Candidates

The Staffing Workbench provides easy access to the tools that you need to determine the best resources for open resource requests. From the workbench, you can:

- Evaluate resource qualifications and preferences.

The resource's Qualification fit score appears in the work space with a link to the Job Scorecard page. You can access the scorecard to review the accomplishments, competencies, or flexible qualification factors that are included in the fit score calculation for this combination of resource and resource request. The scorecard indicates if the resource is qualified, partially qualified, or not qualified to meet each requested accomplishment, competency, or flexible qualification factor. For any requested competency, the scorecard also displays the resource's interest level, if available, providing insight into the resource's preferences.

- Evaluate resource availability.

The resource's Availability fit score also links to the Job Scorecard page. The scorecard identifies existing tasks on the resource's schedule that conflict with the resource request dates. You can review the conflicting dates, hours, and tasks, drill down to make modifications as needed, and return to the workbench. From the workbench, you can also view a list of the resource's existing assignments, or open the resource's schedule to view or modify details about scheduled assignments or appointments.

- Review resource profiles.

Clicking a resource name opens the resource's profile. You can review the resource's general information, work experience, qualifications, and preferences.

- View and modify service orders, resource requests, or assignments.

If you can't find a suitable resource for an assignment, you can jump to the assignment, make necessary changes, save the changes, and return to the workbench. Or you can open and modify the service order or resource request from a link on the workbench, save your changes, and return to the workbench.

Specifying Staffing Workbench and Service Order Fulfillment Options

To specify workbench and service order fulfillment options, use the Staffing Workbench Options component (RS_MYWKBNCH_OPT).

This section discusses how to:

- Specify Staffing Workbench options.
- Specify order fulfillment options.

Pages Used to Specify Staffing Workbench and Service Order Fulfillment Options

Page Name	Object Name	Navigation	Usage
Staffing Workbench - Workbench	RS_MYWKBENCH_OPT	Resource Management, Define User Options, My Workbench Options, Workbench	Select default resource groups from which you staff resources.
Resource Group Definition - Resource Groups	RS_RESOURCE_GROUPS	- Click Add Resource Groups on the My Workbench Options - Workbench page. - Click Add Resource Groups on the Staffing Workbench - Fulfill Orders page. - Click Add Resource Groups on the Staffing Workbench - Manage Utilization page. - Resource Management, Express Search, Express Search - Click Add Resource Groups on the Express Search page. - Resource Management, Define User Options, Resource Group Setup, Resource Group Definition - Resource Groups	Add or modify resource groups and select active resource groups.
Staffing Workbench - Orders	RS_MYWKBENCHREQ_OPT	Select the Orders tab on the My Workbench Options - Workbench page.	Select the default search scope option for the Staffing Workbench - Fulfill Orders page.

Specifying Staffing Workbench User Options

Access the My Workbench Options - Workbench page.

Workbench Orders

User ID: RM4

Name: Catherine Jones

Select the default resource group that is used on the Staffing Workbench - Fulfill Orders or Manage Utilization pages, the Express Search page, and the Resources Needing Assignments operational summary portal pagelet.

Click Add Resource Groups to create new groups, modify or delete existing groups, or modify your list of active groups.

Resource Group ID All Resources [Add Resource Groups](#)

My Workbench Options - Workbench page

Resource Group ID

Enter the default resource group from which you staff resource requests. The list contains the groups that you designate as active.

Your selection appears as default resource group that is used on the Staffing Workbench - Fulfill Orders, the Express Search page, and the Resources Needing Assignments operational summary portal pagelet. It is also used as the default resource group that appears in the Resources work space when you enter the Staffing Workbench - Manage Utilization page.

You can select different resource groups on the Staffing Workbench or the Express Search page when you search for resources or resource requests.

Add Resource Groups

Click to access the Resource Group Definition - Resource Groups page and modify your list of active groups, edit an existing group, or create a new group.

See [Chapter 16, “Enabling Resource Matching and Cache Processes,” Establishing Resource Groups, page 167.](#)

Specifying Order Fulfillment User Options

Access the My Workbench Options - Orders options page.

Workbench **Orders**

User ID: RM4

Name: Catherine Jones

Select the default method by which you search for resources. You can use either a resource group or the owning organization on the service order.

Search Options

☒ Resource Group

☐ Request Owning Organization

My Workbench Options - Orders options page

Search Options

Select the default method for identifying the group of resources to match against the resource requests that appear on the Staffing Workbench - Fulfill Orders page.

Resource Group: Select to match resource requests against the default resource group that you select on the My Workbench Options - Workbench page.

Request Owning Organization: Select to match resources against the owning organization that is specified on the service order.

You can specify different search settings from the Staffing Workbench - Fulfill Orders page when you search for resources.

Note. The My Workbench Options - Utilization options page is discussed in a subsequent chapter.

See Also

Chapter 24, “Managing Resource Utilization,” Specifying Resource Utilization User Options, page 348

Fulfilling Open Resource Requests

This section discusses how to:

- View open resource requests.
- Filter and expand resource request lists.
- Search for resources.
- Evaluate candidates.
- Review the request schedule Gantt chart.
- Perform actions.
- Confirm actions.

Pages Used to Fulfill Open Resource Requests

Page Name	Object Name	Navigation	Usage
Staffing Workbench - Fulfill Orders	RS_MYSERVICEORDERS	Resource Management, Staffing Workbench, Fulfill Orders	Find resources to fulfill open resource requests.
Staffing Workbench - Add Request to List	RS_SCWB_RRSRCH_SEC	 Click the Add Request to List icon on the Staffing Workbench - Fulfill Orders page.	Populate the workbench with resource requests for service orders that are not assigned to you.
Select Resource - Resource Search	RS_RESRC_SRCHM_SEC	Click Add Resource in a row in the Requests scroll area on the Staffing Workbench - Fulfill Orders page.	Directly associate resources with resource requests on the Staffing Workbench - Fulfill Orders page.
Staffing Changes Confirmation	RS_SCWB_CONF_MSG	- Save an action on the Staffing Workbench - Fulfill Orders page. - Save an action on the Staffing Workbench - Manage Utilization page.	View actions before committing changes. Add comments for assignment activity.
Update Confirmation	RS_SCWB_CONF_MSG	Click OK on the Staffing Changes Confirmation page.	Confirm actions.

Viewing Open Resource Requests

Access the Staffing Workbench - Fulfill Orders page.

Staffing Workbench - Fulfill Orders page

Progress	Customer	Description	IDs	Fulfillment	Days	Role	Dates
Not Started	Central Association	Perform Upgrade Activities	US004/0000000022/ 1	0 of 1	155	Project Consultant	11/30/2003 - 01/14/2005
In Process	Japan Operations Interunit Customer	Proj Consultant - Super Sport	JPN01/0000000006/ 1	0 of 1	101	Project Consultant	03/12/2004 - 07/30/2004
In Process	Tekno-Sporto, Japan Ltd.	Resource Mgmt Install Exp	JPN01/0000000002/ 1	0 of 2	110	Previous Project Manager	03/01/2004 - 07/30/2004
Not Started	Tokyo Wholesale Suppliers	Previous Translation Exp	JPN01/0000000005/ 1	0 of 3	40	Document Writer	11/15/2003 - 03/15/2004

Staffing Workbench - Fulfill Orders page

The Staffing Workbench - Fulfill Orders page is the starting point for managing service order fulfillment. From here you can:

- Perform a search using the Resource Match engine.
- Retrieve candidates based on the optimal solution set from the Resource Optimization Solve Application Engine process (RS_OPTIMIZE).
- Initiate a service requisition in PeopleSoft Services Procurement to fulfill a resource request with a contractor.
- View resources who are recommended or who have submitted bids for resource requests.
- View resources who are already associated with the resource requests.
- Search for specific resources to evaluate their fit scores for a resource request.
- Drill down to details about service orders, requests, resource profiles, assignments, and schedules to enable you to finalize staffing decisions.

Hello , <User Name>

Displays the name that is associated with the user ID.

**You currently have
<number> unworked items
in your worklist!**

Click to access the Worklist page and view or process items that are routed from PeopleSoft workflow.

Note. The number of unworked items on the Worklist page does not necessarily correspond to the number of unfulfilled resource requests on the Fulfill Orders page.

See [Chapter 25, "Processing Worklist Items,"](#) page 367.

Requests

Upon entering the workbench, the Requests scroll area (also called the *Requests work space*) displays a summary-level, collapsed row for each open resource request on a service order that is assigned to you. For each request, you can view:

- Visual indicators that depict how close the current date is to the requested start date for requests.
- Resource request fulfillment progress.
- Summary information about the service order and resource request.

Visual Indicators

Each resource request row in the work space has a visual indicator that depicts how close the current date is to the requested start date for the request. This helps determine which requests need your attention first.



The corresponding resource request starts in more than two weeks.



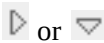
The corresponding resource request starts within two weeks.



The corresponding resource request start date has passed.

Resource Request Summary Rows

Rows in the Requests work space are collapsed when you enter the page. These rows provide resource request summary information.



Click to expand or collapse individual resource request rows. Expanded rows display information about resources who are associated with a resource request.



Click to sort the list of resource requests by the corresponding column heading in ascending or descending order.

Progress

Displays resource request fulfillment progress.

In Process: At least one assignment—in any status—exists for this resource request.

Not Started: No assignments exist for this resource request.

Customer

Displays the customer name that appears on the service order associated with this resource request.

Description

Click the resource request description link to access the Order Summary page to view or modify the service order or resource request. To return to the Staffing Workbench, click Save on the Order Summary or Resource Requests page, or click Return to Staffing Workbench.

See [Chapter 22, “Requesting Resources Using Service Orders,” Creating and Modifying Service Orders, page 300.](#)

IDs

Displays a concatenation of the business unit ID, service order ID, and resource request line ID.

Fulfillment	Displays the number of requested resources that are fulfilled, and the total number of resources requested.
	Note. For a requested resource to be treated as fulfilled, the resource assignment status must be <i>Assigned</i> .
	If you use PeopleSoft Services Procurement, and if a service requisition exists for this resource request, the requested quantity and number of requests that are filled or canceled in PeopleSoft Services Procurement appear in this column.
Days	Displays the number of work days required to complete the project.
Role	Displays the project role.
Dates	Displays the start and end dates of the request. If multiple date ranges are indicated on the request, this column displays the earliest start and latest end dates of those indicated date ranges.

Resource Rows

When you expand resource request summary rows, they display basic information about resources who are associated with the resource request, the resource’s factor fit scores for the request, the resource’s assignment status, and a link to the assignment, if applicable.

A resource may appear in the expanded row if:

- An assignment for the resource exists for the resource request.
- You are considering the resource for the resource request.
- The Resource Match engine returns the resource in a search.
- You retrieve bids and recommendation for the resource request.
- You add this resource to the resource request row.
- This resource-and-resource request match is included in the latest Resource Optimization optimal solution set for the business unit.

A more detailed discussion of the information that appears for each resource row is discussed in the Evaluating Candidates section of this chapter.

Filtering and Expanding the Resource Request List

You can choose a filter, located under Hello <User Name> on the Staffing Workbench - Fulfill Orders page, to view subsets of the unfulfilled resource requests that are assigned to you. Filters control the resource requests that appear in the Requests scroll area list or the request schedule Gantt chart. When you select a filter that limits the list of requests, such as requests that are not started, the requests that do not meet the filter criteria do not appear in the list or chart. The number of resource requests that are included in a filter appears in parenthesis next to the filter name.

All	Click to view all open resource requests that are associated with a service order that is assigned to you and has a value of <i>New Open</i> , or <i>In Process</i> . The All <number> link is disabled while you are in this filter.

Requests Not Started

Click to view a subset of resource requests that do not have any resource assignments. The Requests Not Started <number> link is disabled while you are in this filter.

Requests In Process

Click to view a subset of resource requests that have at least one resource assignment in any status. The Requests In Process <number> link is disabled while you are in this filter.

Selected Requests

Click after selecting the check box beside the resource requests that you want to appear in the Requests work space. To remove another resource request from this filter, clear the request check box and click Selected Requests again.

You can use the toolbar—located just above and below the Requests work space—to expand all request rows so that you can view or take action on resources who are associated with the requests. You can also locate a resource request that is assigned to a different user to add to your work space, and toggle between a grid and chart format for viewing resource requests.



Click Select All to select all resource requests that appear in the work space.



Click Deselect All to deselect all resource requests that appear in the work space.



Click Expand All to expand all resource request summary rows in the work space.



Click Collapse All to collapse all resource request summary rows in the work space.



Click Add Request to List to access the Staffing Workbench - Add Request to List page and locate and populate the work space with resource requests that are assigned to a different user to fulfill.

When you enter the Staffing Workbench - Fulfill Orders page the list of resource requests appears in a grid format. You can switch to the chart format at any time and then switch back to the grid format. The same resource requests appear regardless of the view that you select. If you select a different filter while the chart view is active, the resource requests in the chart view change to reflect the new filter.



Click Request Schedule Gantt Chart to view the list of resource requests in a chart view. The Request Schedule Gantt chart displays the same resource requests as the list format, which are open requests—all requests, requests not started, requests in process, or selected requests—that appear in the active filter.

This icon appears only if the active view is the Requests grid.



Click Requests Grid to view the list of resource requests in a grid format in the Requests work space.

This is the default view for the Staffing Workbench - Fulfill Orders page. This icon appears only if the active view is the Request Schedule Gantt chart.

Add Resource Request to Grid

Click Add Request to List to search for specific resource requests to populate the Requests work space.

Staffing Workbench

Add Request to List

Enter the Business Unit, Service Order ID, and Request Number of the resource request that you want to add to the workspace for this session. If you do not choose a Resource Request number, all of the Resource Requests for the Business Unit/Service Order ID combination will be added.

Business Unit:

JPN01

JAPAN OPERATIONS

Service Order ID:

0000000004

Projects Upgrade

Request Number:

Staffing Workbench - Add Request to List page

Business Unit	Enter the business unit of the service order that you want to locate. You must enter the business unit before you enter other values; it determines the valid service order IDs.
Service Order ID	Enter the service order. You can search for the service order by the person who is responsible for staffing it, customer ID or name, description, project, service order ID or status, or by the user ID of the individual who created the order.
Request Number	Enter a request number, or click the adjacent Lookup icon to view and select a resource request. If you don't select a value, the system adds all open resource requests that are associated with the selected business unit–service order combination to the Requests work space when you click OK.

Searching for Resources

There are five ways to find resources to fulfill resource requests on the Staffing Workbench:

- Retrieve resources for the selected rows based on search options and each resource's factor family fit scores for the request.
This method uses the Resource Match engine to find resources with the qualifications, availability, and preferences to match the selected resource requests.
- Retrieve resources who entered a bid or received a recommendation for a resource request that appears in the work space.
- Add a resource to a resource request row.
- If you use the Resource Optimization feature, retrieve optimized resources who appear in the most recent optimal solution set for the business unit that is identified on the service order.
- If you use PeopleSoft Services Procurement, initiate a search for a qualified third-party service provider.

These toolbar icons invoke a search for resources and the visual indicators appear when a resource matches the search criteria:



Click Retrieve Optimal Resource for selected Requests to retrieve optimal resources for the selected resource requests, as the Resource Optimization Solve process determines. The results that appear reflect the most recent optimal solution set for the service order owning business unit.

The system returns optimal resources to the work space with the resource request row expanded and a visual indicator that this is the optimal resource for the request.

This icon is visible if you have successfully run the Resource Optimization Solve process.

Note. Optimal resources are based on the most recent run of the Resource Optimization Solve process. Changes to resource profiles, schedules, employee data, service orders, resource requests, or assignments can affect the solution set for the corresponding business unit and potentially render the optimal results invalid.



This is the optimal resource for this resource request based on the latest optimal solution set for the owning business unit on the service order.



Click Search for Resources for selected Requests to retrieve resources for the selected rows based on search options and each resource's factor fit scores for this request. Specify search options at search time. The Resource Match engine calculates factor fit scores for each combination of resource and resource request.

The system returns resources who meet this criteria for a resource request to the work space with the resource request row expanded and a visual indicator that the resource is a result of a Resource Matching search.

A message appears for each selected row stating the number of resources that the system found in the search results for the request.



The corresponding resource was returned in the search results from the Resource Match engine.



Click Retrieve Bids and Recommendations for selected Requests to retrieve resources who entered a bid or received a recommendation for the selected resource requests.

The system returns resources who meet this criteria to the work space with the resource request row expanded and a visual indicator that the resource entered a bid or received a recommendation for the corresponding resource request.



The resource entered a bid or received a recommendation for the corresponding resource request. Move the mouse across the visual indicator to view the alternate text, which indicates if the resource submitted a bid or was recommended for the resource request.



Click Clear Unwanted Resources for selected Requests to clear unassigned resources, or resources who are not in a *Considering* status, from selected resource request rows.

These buttons and icons appear for each resource request row in the work space:

Add Resource



Click to add a resource to the list of candidates. Use this option to directly associate a resource to the resource request. Select the resource and return to the workbench to select the appropriate action.

Click Find External Resource to access the Create Requisition page in PeopleSoft Services Procurement and create, view, or modify a service requisition to fulfill a resource request with a contractor. Depending on options that are specified on the Installation Options - Resource Management page, either the Create Requisition - Request Defaults page appears for you to select the business unit and requester, or the Create Requisition - Service Details page appears for you to complete the service requisition.

This icon is visible only if you use PeopleSoft Services Procurement to outsource assignments to qualified suppliers that satisfy the requirements.

These fields on the PeopleSoft Resource Management resource request populate the PeopleSoft Services Procurement service requisition:

- A concatenation of the service order and resource request ID populate the Reference field (DESCR) on the service requisition.
- Resource request project role populates the Service field (PROJ_ROLE) on the service requisition.
- Resource request description populates the Job Title field (JOB_TITLE) on the service requisition.
- Resource request project business unit, project, and location populate the Project Unit (BUSINESS_UNIT_PC), Project (PROJECT_ID), and Location (LOCATION) fields, respectively, on the service requisition.
- Qualifications on the resource request populate the Competencies field (COMPETENCY_DESC) on the service requisition.

Note. The degree of importance of each competency—desired or required—is not used on the service requisition.

- The first start date and last end date on the resource request populate the Start Date field (START_DATE) and End Date field (END_DATE) on the service requisition.
- Days of work on the resource request populate the Duration field (DURATION) on the service requisition.

Note. On the service requisition, enter a service type with a service method of *Resource*.

See *PeopleSoft Services Procurement 8.8 PeopleBook*, “Creating and Managing Requisitions”.

The following sections provide more details on how to fulfill resource requests on the Staffing Workbench:

Retrieve Resources Based on Factor Fit Scores

Expand the Search Options and Search Settings collapsible group boxes on the Staffing Workbench - Fulfill Orders page.

The screenshot shows the 'Search Options' and 'Search Settings' sections. In 'Search Options', the 'Resource Group' radio button is selected, and 'Resource Group ID' is set to 'All Resources'. The 'Request Owning Organization' radio button is unselected, and '*Personnel Status' is set to 'All'. The 'Search Settings' section contains a descriptive paragraph about the search algorithm. Below this, 'Availability' is set to '4 - More important', 'Preferences' is set to '1 - Much less important', 'Qualifications' is set to '3 - Important', and 'Max Candidates' is set to '5'.

Search Options and Search Settings collapsible group boxes on the Staffing Workbench - Fulfill Orders page

Note. Search options and search settings apply only when you click Search for Resources for selected Requests to perform a search using the Resource Match engine.

To populate the workbench with resources based on the resource's factor fit scores for this request:

1. In the Search Options collapsible group box, specify the search options that enable you to direct your search to a Resource Group or the Request Owning Organization that is specified on the service order.
If you select Resource Group, enter the Resource Group ID.
2. If you allow non-employees to be resources, select to include all personnel statuses, or just employees or non-employees, in your search.
3. In the Search Settings collapsible group box, assign the relative priorities to the Availability, Preferences, and Qualifications factor family fit scores for this search session, and identify the number of results that are to be returned.
4. Select the resource request rows for which you want to search for resources.
5. Click Search for Resources for selected Requests.

If selected resource requests are matched with resources based on the specified search options and the resources' factor fit scores, the resources appear in the work space with the row expanded and a visual indicator that the corresponding resource was returned in the search results from the Resource Match engine.

The priorities that you specify during the search session are included in each resource's overall fit score calculations. The resources appear in descending order of their overall fit score, which measures how well a resource fits the specified qualifications, availability, and preferences; accounting for the organization's priorities; and the priorities that you specify during the search session. If you change the priorities and search again, the Resource Match engine recalculates overall fit scores, which potentially changes the order of resources.

See [Chapter 3, "Understanding Resource Matching," The Overall Fit Score, page 35](#).

Note. If you change a service order or resource request and immediately search for resources to fulfill the request on the Staffing Workbench - Fulfill Orders page using the Resource Match engine, a message may appear indicating that search results for this request will be available shortly. This occurs when the Resource Match engine is recalculating factor fit scores for all eligible resources for the request at the time of your search. Wait a short while and repeat the search.

If the message persists on the Staffing Workbench - Fulfill Orders page, there may be a system problem. For example, the Service Order Update message (SERVICE_ORDER_UPDATE) will be interrupted if you update service orders but you have not enabled the publication or subscription services on the Application server.

Retrieve Resources Based on Resource Bids and Manager Recommendations

To populate the workbench with resources who entered a bid or received a recommendation for a resource request:

1. Select the resource request rows for which you want to search for resources.
2. Click Retrieve Bids and Recommendations.

If selected resource requests have resources who submitted a bid or received a recommendation, the resources appear in the work space with the row expanded and a visual indicator that the corresponding resource submitted a bid or received a recommendation.

You can submit a recommendation for a resource directly on the resource request or from the Staffing Workbench - Manage Utilization page. A resource can submit a bid for a resource request from the Job Spy page.

Add Resources to the Work Space

Click Add Resource on a corresponding resource request row to access the Select Resource - Resource Search page.

Select Resource

Resource Search

Search Criteria

*Search by:

Last Name

Last Name:

NG

Search

Search Results

Customize | Find | View All |

First 1 of 1 Last

Name	EmplID	Location	Department	Personnel Status
Edward Ng	KU0056	ICA1	Sales and Services	Employee

Selected Resources

First 1 of 1 Last

Name	EmplID	
Edward Ng	KU0056	-

OK

Cancel

Select Resource - Resource Search page

To directly add resources to the work space for a resource request:

1. Search for a resource by employee ID or name.
2. Select one or more resources from the search results to move to the Selected Resources grid.

Continue searching and selecting resources as needed. Delete rows from the Selected Resources grid as needed.

3. Click OK.

The selected resources appear in the work space under the resource request summary row.

Retrieve Resources Based on the Optimal Solution Set

To populate the workbench with resources based on the latest optimal solution set:

1. Select the resource request rows for which you want to search for resources.
2. Click Retrieve Optimal Resource for selected Requests.

If selected resource requests have resources who appear on the most recent optimal solution set for the service order owning business unit, the resources appear in the work space with the row expanded and a visual indicator that the corresponding resource is from the optimal solution set.

Note. Search options that you specify on this page do not impact the optimal solution set results that appear in the work space.

Find Third-Party Service Providers Using PeopleSoft Services Procurement

To initiate a search for a qualified third-party service provider in PeopleSoft Services Procurement:

1. Click Find External Resource on the resource request row.
2. Enter the business unit that is associated with this service requisition, if required based on options that are specified during implementation on the Installation Options - Resource Management page.
3. Enter the requester from the list of valid requesters, if required based on options specify during implementation.

The list contains only the requesters for which you are authorized to submit requests. The service requisition appears with key requisition data populated from the resource request. The system creates multiple rows on the service requisition if the unfulfilled quantity on the resource request is greater than one.

4. Verify or edit the data in each service requisition field.
5. Save and submit the service requisition to close the window and return to the Staffing Workbench.

The next time you refresh the Staffing Workbench, the service requisition ID, requested quantity, and number of requests that you filled or canceled appear on the associated resource request row. Click Find External Resource on the resource request row to view or modify the requisition in PeopleSoft Services Procurement.

See *PeopleSoft Services Procurement 8.8 PeopleBook*, “Creating and Managing Requisitions”.

Evaluating Candidates

resources who meet the search criteria for a resource request appear under the resource request summary row.

Requests		Find First 1 of 1 Last									
Progress	Customer	Description	IDs	Fulfillment	Days	Role	Dates				
☒ In Process	Japan Operations Interunit Customer	Proj Consultant - Super Sport	JPN01/ 0000000006/1	0 of 1	101	Project Consultant	03/12/2004 - 07/30/2004				
Qual.	Avail.	Name	Personnel Status	Status	Action	Job Title	Bill Rate	Location	Supervisor		
53%	99%	Scooter Evans	Non-Employee	Proposed		Senior Con	350.00 USD	Las Vegas, NV, USA	George Lane		
10%	100%	Opal Ryan	Non-Employee			Data Anal	270.00 USD	San Luis Obispo, CA, USA	George Lane		
10%	100%	Patricia Morse	Employee			General Ma	290.00 USD	Portland, OR, USA	Dena Myers		
10%	100%	Cheyanne Wells	Employee	Proposed		Manager	270.00 USD	Alexander, WW, USA	Dena Myers		
Add Resource 4 search results found for this Request.											

Expanded Requests scroll area on the Staffing Workbench - Fulfill Orders page

If selected resource requests are matched with resources based on the specified search options and the resource's factor fit scores, the resources appear in the work space with the row expanded. You can Selected Requests to hide all other resource request rows from view.

Expanded rows display basic information about resources, the resource's factor fit scores for the request, the assignment status (if applicable), and a link to the resource profile and job scorecard.

Qual. (qualification) and Avail. (availability)	Displays the Qualification and Availability factor family fit scores, which indicate how closely the resource's profile and schedule match the resource request. Click either fit score link to access the Job Scorecard for <Resource> page and view details about requirements that are included in the resource's fit score calculation for each factor family. See Chapter 20, "Assigning Resources," Viewing the Job Scorecard, page 274.
Name	Click the resource name link to open the resource profile in a new browser window. To return to the Staffing Workbench, either close the resource profile browser window or click in the Staffing Workbench window. See Chapter 18, "Maintaining Resource Profiles," Reviewing Resource Profiles, page 228.
Personnel Status	Displays the resource's personnel status. This column appears only if you allow non-employees to be established as resources.
Status	Displays the assignment status and provides a link to the assignment if the resource is assigned to the resource request. Click the status link to access the Assign Resource page to view or update the assignment. To return to the Staffing Workbench, either close the assignment browser window or click in the Staffing Workbench window. This field is blank if a resource is associated with the request through a bid or recommendation, or was placed on the workbench as a result of Resource Matching, Resource Optimization, or a direct search.
Action	Select the appropriate action to take on this resource. Available values are based on the resource's current assignment status for this resource request and your user role security. Values are: <i>Assign:</i> Assign the resource for this resource request. The assignment appears on the confirmation pages for you to edit and verify. If assignment approval workflow is enabled, the assignment is automatically routed to the resource's manager for approval after you save and confirm the actions on the workbench. The next time you refresh the Staffing Workbench and this resource request appears in the Requests grid, the resource's assignment status will be <i>Pending Approval</i>. The assignment remains in a pending status until it is approved or canceled. If assignment approval workflow is not enabled, or if the user that is logged into the system is the resource's manager, the assignment can be saved in a status of <i>Assigned</i> without triggering assignment approval workflow. <i>Interview, Propose, or Reserve:</i> Create an assignment for the selected resource as soon as you save the actions on the workbench. The assignment appears on the confirmation pages for you to edit and verify. <i>Consider:</i> Associate the candidate with the resource request as someone whom you are considering as a possible match. This is not an assignment status. <i>Cancel:</i> Cancel an existing assignment.

Complete: Complete an assignment that is in an *Assigned* status.

See [Chapter 20, “Assigning Resources,” Assignment Statuses, page 254.](#)

Job Title

Displays the resource’s job title.

Bill Rate

Displays the resource’s bill rate and currency as specified for the resource’s employee ID. If no bill rate is specified for the employee ID, the value is the rate that is associated with the job code in the Job Code Rates table (PC_RATE_JOBC). If neither value exists, the bill rate value is \$0.0000.

Location

Displays the location of the resource as specified in the Personal Data record (PERSONAL_DATA).

Supervisor

Displays the name of the resource’s supervisor from the Job record (JOB).



Click the View resource assignment list icon to access the Assignments for <Resource> page in a new browser window and view the resource’s current assignments, bids, recommendations, and assignment history. This information is useful when evaluating the true availability of candidates, as there may be assignment activity that does not appear on their schedule or that impacts their availability score.

Close the browser to return to the workbench, or leave the Assignments for <Resource> page open and click the workbench window.

See [Chapter 20, “Assigning Resources,” Accessing Additional Assignment Options, page 271.](#)

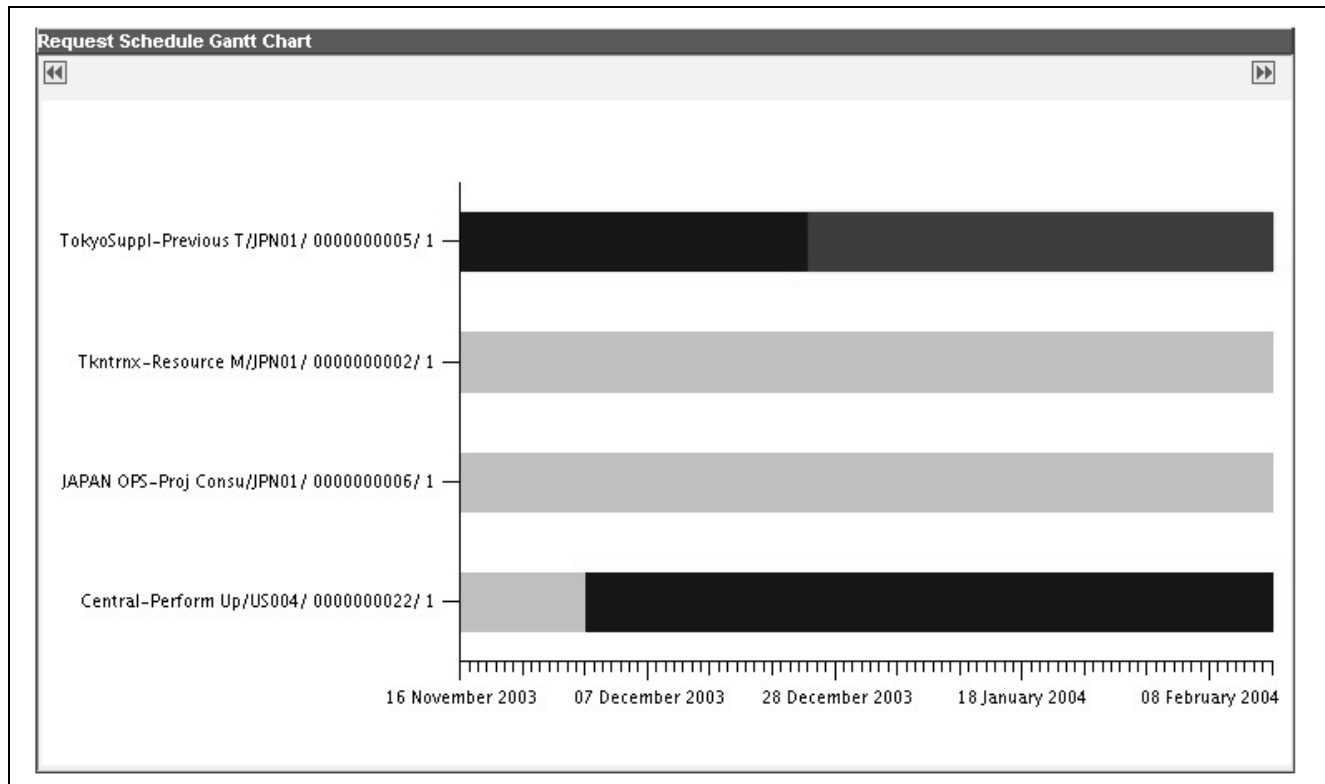


Click the View monthly calendar icon to access the resource’s monthly schedule in a new browser window and view the assignments and appointments schedule. Close the browser to return to the workbench, or leave the schedule open and click the workbench window.

See [Chapter 19, “Maintaining Resource Schedules,” Working with Resource Schedules, page 242.](#)

Reviewing the Request Schedule Gantt Chart

Access the Request Schedule Gantt Chart view on the Staffing Workbench - Fulfill Orders page.



Request Schedule Gantt Chart view

You can toggle the work space view between the Requests scroll area and the request schedule Gantt chart at any time. Both views contain open resource requests that appear in the active filter—all requests, requests not started, requests in process, or just selected requests. If you select a filter while the Requests scroll area is active and then you switch to the chart view, the same filter is used to display resource requests in the chart. If you are in the chart view, select a new filter, and then revert back to the Requests scroll area, the new filter applies to the scroll area.

The request schedule Gantt chart displays:

- Resource request schedules for the next quarter beginning with the current date, with navigation icons to move to the previous or next quarter.
- The customer name, service order description, business unit, and resource request ID.
- Chart bars that represent the request days of work, start and end dates, and the lag time between the request period days and days of work.
- Gray bars that represent any period of time that falls outside of the overall date range.
- Blue bars that represent the resource request days of work.
- Red bars that represent the lag time between the overall date range and the days of work.

Move your mouse across a blue or red bar to view alternate text about the resource request days of work and the number of resources who are needed.

Click a resource request chart bar to return to the Requests scroll area with the Selected Requests filter active and the resource request row selected and expanded.

Performing Actions

To perform an action on the Staffing Workbench - Fulfill Orders page:

1. In the Requests scroll area of the grid view, select the Select this row check box for the resource request summary rows on which you want to perform an action.
2. Enter a corresponding action value for the resource-and-resource-request combinations for selected resource request summary rows.

You can perform an action on any or all resource-and-resource request combinations that appear in the work space.

Note. You cannot assign a greater number of resources to a resource request than is needed. For example, if a resource request for a quantity of one resource is linked to an assignment in a status of *Pending Approval*, you cannot assign an additional resource to the resource request unless the pending assignment is canceled.

3. (Optional) Click the Staff Optimal Solution icon to enter an action of *Proposed* for the resources that the system returned when you clicked Retrieve Optimal Resource for selected Requests.

This action occurs for all resources who are based on the optimal solution set, even if the resource request row is not selected.

4. Click Save Actions for all selected items to perform the actions on the selected summary rows.

Note. When you save actions on one workbench page, the unsaved actions are performed on all workbench pages. For example, if you have access to the Fulfill Resources page and the Manage Utilization page on the Staffing Workbench, any actions that you select for a resource request-and-resource combination on either page are performed when you save either page. The actions from both pages are listed on the Staffing Changes Confirmation and Update Confirmation pages.

When you save the work space and accept the confirmation pages:

- If there is no existing assignment for this combination of resource and resource request, and if you selected an action status of *Assign*, the system:
 - Creates a new assignment with the indicated status if assignment approval workflow is not enabled, or if the user that is logged into the system is the resource's manager.
 - Automatically routes the assignment to the resource's manager for approval if assignment approval workflow is enabled.
- If there is no existing assignment for this combination of resource and resource request, and if you selected an action status of *Interview*, *Propose*, or *Reserve*, the system creates a new assignment with the indicated status.
- If you selected an action status of *Consider*, the system saves the record to associate this resource with the resource request as a possible candidate.

An assignment is not created for an action status of *Consider*.

Note. resources who are in a status of *Consider* are associated with the resource request only on the Staffing Workbench. This information does not appear anywhere else in the system. These resources appear in the work space each time the resource request appears until their status changes or the resource request is closed or canceled.

- If the resource is already assigned to this resource request, the system updates the assignment with the new assignment status.

Confirming Actions

When you save the actions on the Staffing Workbench, the Staffing Changes Confirmation page appears and explains the changes to be made for every selected resource request. When you accept the changes, the Update Confirmation page appears and confirms that the changes were successful.

Use these pages to confirm that:

- An assignment is created for an action of *Assign*, *Interview*, *Propose*, or *Reserve* for a resource who is not already assigned to this resource request
- If assignment approval is required, the status of the assignment changes to *Pending Approval*.
- The status of an existing assignment for a resource is changed according to the specified action.
- Any workflow that is associated with the status change is invoked when you confirm the staffing changes.
- Assignment history is updated when you confirm the staffing changes.

Note. You can change the assignment default values that appear on the Staffing Changes Confirmation page.

Staffing Changes Confirmation

Access the Staffing Changes Confirmation page.

Staffing Changes Confirmation

The following is a list of the staffing changes you have made. You can save these changes by clicking on the OK button. Click on the Cancel button to return to the workbench without saving these changes.

Japan Operations Interunit Customer, Project Consultant Proj Consultant - Super Sport 1 Resource(s) Needed, Start 03/12/2004, End 07/30/2004, 101 Days

Assignment ID: NEXT ☒ **Update**

Name: Cheyanne Wells

Project: 0000000165 **Role:** Project Consultant

☒ **Monday** ☒ **Tuesday** ☒ **Wednesday** ☒ **Thursday**
☒ **Friday** ☐ **Saturday** ☐ **Sunday**

Indicate when the assignment will be worked.

Start Date	End Date	*Start Time	Hrs	Description		
03/12/2004	05/31/2004	8:00:00AM	8.00		+	-
07/01/2004	07/30/2004	8:00:00AM	8.00	Project break in June	+	-

	As of Date	Comments
New assignment will be added with the status Proposed.	11/16/2003	

Staffing Changes Confirmation page

Note. The information that appears on the Staffing Changes Confirmation page and Update Confirmation page is different based on the source of the action. If you initiate an action from the Fulfill Orders page, the resource request description appears at the top of the update section on the confirmation pages. If you initiate an action from the Manage Utilization page, the resource description appears at the top of the update section on the confirmation pages.

The system displays a summary of the changes for each resource request row that is selected at save time. If there are no changes for a selected row, the message No actions indicated for this Resource Request appears.

You can modify the assignment values that appear on the Staffing Changes Confirmation page.

Update	Select to confirm the change and update the assignment, resource request, resource schedule, and other workflow. Clear this check box to cancel the updates. The check box is selected by default.
Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday	View the default or existing work days for the assignment, and modify as needed by selecting or clearing the appropriate check boxes.
Start Date and End Date	View the default or existing dates for the assignment, and modify as needed. To accommodate a noncontiguous schedule, add a row for each nonconsecutive start and end date range for a single assignment.
Start Time and Hrs (hours)	View the default or existing start time and hours for the assignment, and modify as needed.
Description	Enter a description of the date range.
OK	Click to save the specified actions and access the Update Confirmation page.

Update Confirmation

Access the Update Confirmation page.

Update Confirmation

The following changes have been made to the database. Please note any error messages that may be present.

Japan Operations Interunit Customer, Project Consultant Proj Consultant - Super Sport 1
Resource(s) Needed, Start 03/12/2004, End 07/30/2004, 101 Days

Assignment ID: 0000000216

Name: Cheyanne Wells

Project: 0000000165 **Role:** Project Consultant

☒ **Monday** ☒ **Tuesday** ☒ **Wednesday** ☒ **Thursday**
☒ **Friday** ☐ **Saturday** ☐ **Sunday**

Indicate when the assignment will be worked.

Start Date	End Date	Start Time	Hrs	Description
03/12/2004	05/31/2004	8:00:00AM	8.00	
07/01/2004	07/30/2004	8:00:00AM	8.00	Project break in June
			As of Date	Comments
Refresh cached resource and resource request information			11/16/2003	
Changes saved successfully.				
Assignment for Cheyanne Wells (RS00000023) with a status of Proposed created successfully.				

Update Confirmation page

Verify the changes and confirm that they occurred as expected. Click [Return to Staffing Workbench](#) to return to the work space and view your changes.

New assignments for the resources in the Requests scroll area now appear with an active link in the Status column under the associated resource request summary row. Assignments that are created in the Staffing Workbench are populated with values from the resource request, and the system places the resource on the assignment with the designated action status. You can click the status link to access the Assign Resource page and view or modify the assignment.

Note. If you select the action *Assign* and assignment approval is required, the next time that you view the resource's assignments or refresh the Staffing Workbench, the resource's assignment status will be *Pending Approval*. The assignment remains in a pending status until it is approved by the resource's manager or canceled.

CHAPTER 24

Managing Resource Utilization

This chapter provides an overview of managing resource utilization using the Staffing Workbench and discusses how to:

- Specify Staffing Workbench and resource utilization options.
- Manage resource utilization.

Understanding Resource Utilization Using the Staffing Workbench

One of the primary responsibilities of a resource manager is to make sure that the resources are effectively utilized. Managing utilization is difficult, and it requires that you know the assignment status, skills, availability, and interests of resources. PeopleSoft Resource Management enables you to effectively manage resource utilization on the Staffing Workbench. The workbench that staffing coordinators use to manage service order fulfillment can also be used by resource managers to fully utilize resources. This common workbench is convenient for practice managers, who are ultimately responsible for both staffing and resource utilization.

The Staffing Workbench - Manage Utilization page serves as a central work space for a resource manager by providing immediate access to the information and features that are most important to that role. When you first access the page, a list of resources appears, along with information about their current assignment status. You can instantly determine the status of each member of the organization.

On the Staffing Workbench - Manage Utilization page, you can:

- View the current assignment status of resources.
 - View resources in a list or in utilization charts.
 - Dynamically filter the resources by assignment status.
 - Select resources to evaluate and filter the view to display only those resources.
 - Select a different resource group to change the list of resources to evaluate.
- Identify potential work assignments for a resource.

- Perform a search for resource requests using the Resource Match engine.

You can specify search options that define the pool of resource requests for the Resource Match engine to evaluate when finding work for resources. If you don't find suitable resource requests, you can change the search options and search again.

You can specify the search settings, such as the relative importance of factor family fit scores and the maximum number of resource requests to review, for the Resource Match engine to use when finding resource requests that fit the availability, qualifications, and preferences of the resource.

- View resource requests for which a resource has submitted a bid or been recommended.
- Select resource requests to evaluate for a resource.
- Evaluate resource-and-resource-request combinations and make recommendations.

Workbench Tools used to Evaluate Resource Requests

With functionality and convenience that is similar to the Staffing Workbench - Fulfill Orders page, the Staffing Workbench - Manage Utilization page provides easy access to the tools that you need to find work for resources. From the workbench, you can:

- Evaluate resource availability, qualifications, and preferences.

The Job Scorecard page contains the request dates and other requirements that are included in the fit score calculation for the resource-and-resource-request combination.

- View current resource assignments in the work space or view a list of all the resource's assignments.

You can open an assignment and modify it as needed, or open the resource's schedule to access all of the resource's assignments and appointments.

- Review the resource's work experience, qualifications, preferences, and other general information in the resource profile.
- Open the service order and resource request to review details.

Specifying Staffing Workbench and Resource Utilization Options

To specify workbench and resource utilization options, use the Staffing Workbench Options component (RS_MYWKBNCH_OPT).

This section discusses how to:

- Specify Staffing Workbench user options.
- Specify resource utilization user options.

Pages Used to Specify Staffing Workbench and Resource Utilization Options

Page Name	Object Name	Navigation	Usage
My Workbench Options - Workbench	RS_MYWKBENCH_OPT	Resource Management, Define User Options, My Workbench Options, Workbench	Select the default resource group to appear on the Manage Utilization page.
Resource Group Definition - Resource Groups	RS_RESOURCE_GROUPS	- Click Add Resource Groups on the My Workbench Options - Workbench page. - Click Add Resource Groups on the Staffing Workbench - Manage Utilization page. - Click Add Resource Groups on the Staffing Workbench - Fulfill Orders page. - Resource Management, Express Search, Express Search - Click Add Resource Groups on the Express Search page. - Resource Management, Define User Options, Resource Group Setup, Resource Group Definition - Resource Groups	Add or modify resource groups and select active resource groups.
My Workbench Options - Utilization	RS_MYWKBENCHRSC_OPT	Select the Utilization tab on the My Workbench Options - Workbench page.	Select options for the Staffing Workbench - Manage Utilization page such as the grid sort order, number of days before the end date that an assignment is treated as ending, minimum utilization percentage, optimal utilization ratio, and chart appearance. You can also specify whether to include your name on the workbench if you are a member of the selected resource group.

Specifying Staffing Workbench User Options

Access the My Workbench Options - Workbench page.

Resource Group ID

Enter the default group of resources to appear in the Resources scroll area (also called the *Resources work space*), upon accessing the Staffing Workbench - Manage Utilization page. The list contains the groups that you designated as active. Your selection is also used as the default resource group search option on the Staffing Workbench - Fulfill Orders page and the Express Search page, and appears on the Resources Needing Assignments operational summary portal pagelet.

If you do not select a resource group, the Resources work space does not contain any resource rows when you access the Staffing Workbench - Manage Utilization page.

You can select a different resource group from the Staffing Workbench and the Express Search page when you search for resources.

Add Resource Groups

Click to access the Resource Group Definition - Resource Groups page and modify your list of active groups, modify or delete existing groups, or create new groups.

See [Chapter 16, “Enabling Resource Matching and Cache Processes,” Establishing Resource Groups, page 167.](#)

Specifying Resource Utilization User Options

Access the My Workbench Options - Utilization page.

Workbench

Utilization

User ID: RS000000001

Name: George Lane

Select this option to include your name on the Staffing Workbench - Manage Utilization page if you are a member of the selected resource group.

☒ Include My Name

Select the sort order for the Staffing Workbench - Manage Utilization page.

Sort Name

☒ Sort by Last Name

☐ Sort by First Name

Enter the number of calendar days prior to the end date of an assignment that a warning is triggered. The warning is triggered on the Staffing Workbench - Manage Utilization page and the Resources Needing Assignments operational summary portal pagelet.

Number of Days:

My Workbench Options - Utilization page (1 of 2)

Chart Options																																																									
Enter the minimum percentage of time that a resource must be scheduled on utilized tasks for the resource to be considered assigned on the Unassigned Resources report. Minimum Percentage: 85.00 Enter a whole number, such as 85 for 85%. Enter the percentage of a resource's total capacity that the resource must be scheduled on utilized tasks for the resource to be considered optimally utilized on the Scheduled Utilization report. Optimal Utilization Ratio: 85.000 Enter a whole number.		Enter the tasks to appear in the Scheduled Utilization, Unassigned Resources, and Resource Schedules reports. Enter corresponding task colors to appear in the Resource Schedules report. <table border="1"> <thead> <tr> <th colspan="2">Selected Tasks</th> <th>Find</th> <th>First</th> <th>1-7 of 7</th> <th>Last</th> </tr> <tr> <th></th> <th>Task Category</th> <th>Task Chart Color</th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Billable External</td> <td>Black</td> <td>+</td> <td>-</td> <td></td> </tr> <tr> <td>2</td> <td>Billable Internal</td> <td>Blue</td> <td>+</td> <td>-</td> <td></td> </tr> <tr> <td>3</td> <td>Nonbillable External</td> <td>Red-Orange</td> <td>+</td> <td>-</td> <td></td> </tr> <tr> <td>4</td> <td>Nonbillable Internal</td> <td>Purple</td> <td>+</td> <td>-</td> <td></td> </tr> <tr> <td>5</td> <td>Corporate Event</td> <td>Green</td> <td>+</td> <td>-</td> <td></td> </tr> <tr> <td>6</td> <td>Meeting</td> <td>Yellow-Ora</td> <td>+</td> <td>-</td> <td></td> </tr> <tr> <td>7</td> <td>Personal Time Off</td> <td>Gray</td> <td>+</td> <td>-</td> <td></td> </tr> </tbody> </table>		Selected Tasks		Find	First	1-7 of 7	Last		Task Category	Task Chart Color				1	Billable External	Black	+	-		2	Billable Internal	Blue	+	-		3	Nonbillable External	Red-Orange	+	-		4	Nonbillable Internal	Purple	+	-		5	Corporate Event	Green	+	-		6	Meeting	Yellow-Ora	+	-		7	Personal Time Off	Gray	+	-	
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6	Meeting	Yellow-Ora	+	-																																																					
7	Personal Time Off	Gray	+	-																																																					

My Workbench Options - Utilization page (2 of 2)

Include My Name

Select to include your name in the Resources work space on the Staffing Workbench - Manage Utilization page if you are a member of the selected resource group.

Sort Name

Select the sort order for resources who appear in the Staffing Workbench - Manage Utilization page.

The default value is *Sort by Last Name*.

Number of Days

Enter the number of days before the end date that an assignment is treated as ending. This number is used to trigger a warning on the Staffing Workbench - Manage Utilization page and the Resources Needing Assignments operational summary portal pagelet that a resource has an assignment ending.

The default value is *14*.

Minimum Percentage

Enter the minimum percentage of time that a resource must be scheduled on utilized tasks for the resource to be treated as assigned in the Unassigned Resources interactive report. Enter a whole number or mixed number. For example, enter 75 for 75 percent, or 85.5 for 85.5 percent.

The default value is *85.00*.

Optimal Utilization Ratio

Enter the percentage of a resource's total capacity that the resource must be scheduled on utilized tasks for the resource to be treated as optimally utilized on the Scheduled Utilization interactive report. Enter a whole or mixed number.

The default value is *85.000*.

Task Category and Task Chart Color

Enter the tasks to appear in the Scheduled Utilization, Unassigned Resources, and Resource Schedule charts. Enter a corresponding task color to appear in the Resource Schedule chart.

If you do not enter tasks and corresponding task colors on this page, the Resource Schedule chart uses the default tasks and colors that are specified on the Installation Options - Resource Management page.

Note. The My Workbench Options - Orders options page is discussed in a previous chapter.

See Also

Chapter 23, “Fulfilling Service Orders,” Specifying Order Fulfillment User Options, page 324

Managing Resource Utilization

This section discusses how to:

- View resources.
- Filter and expand resource lists.
- Search for assignments for resources.
- Evaluate resource requests.
- Review utilization charts.
- Perform actions.
- Confirm actions.

Pages Used to Manage Resource Utilization

Page Name	Object Name	Navigation	Usage
Staffing Workbench - Manage Utilization	RS_MYRESOURCES	Resource Management, Staffing Workbench, Manage Utilization	View key resource statistics and find assignments for available resources.
Staffing Workbench - Add Request to List	RS_SCWB_RRSRCH_SEC	Click Add Request in a resource row in the Resources work space on the Staffing Workbench - Manage Utilization page.	Search for resource requests to directly associate with resources on the Staffing Workbench - Manage Utilization page.
Staffing Changes Confirmation	RS_SCWB_CONF_MSG	• Save an action on the Staffing Workbench - Manage Utilization page. • Save an action on the Staffing Workbench - Fulfill Orders page.	View actions before changes. Add comments for assignment activity.
Update Confirmation	RS_SCWB_CONF_MSG	Click OK on the Staffing Changes Confirmation page.	Confirm the Staffing Workbench actions.

Viewing Resources

Access the Staffing Workbench - Manage Utilization page.

Resource Name	Bill Rate	Status	Customer	End Date	Personnel Status
Evans, Scooter	350.00 USD	Unassigned		07/30/2004	Non-Empl
Johnson, Holly	250.00 USD	Billable External	Sara Outdoor	02/06/2004	Non-Empl
Lawson, Stephen	175.00 USD	Ending Assignments		11/25/2003	Employee
Price, Randall	190.00 USD	Unassigned		09/30/2003	Non-Empl
Ryan, Opal	270.00 USD	Unassigned		06/30/2003	Non-Empl

Staffing Workbench - Manage Utilization page

The Staffing Workbench - Manage Utilization page provides a multilayer view of PeopleSoft Resource Management data that is especially useful for the resource manager. The first scroll area displays encapsulated resource data with visual indicators denoting the resource's current assignment status. You can access resource assignments, profiles, and schedules, and use the Resource Match engine to find potential resource requests for a resource. You can also review interactive reports and recommend resources for specific requests.

Hello , <User Name> Displays the name that is associated with the user ID.

You currently have <number> unworked items in your worklist! Click to access the Worklist page and view or process items that are routed from PeopleSoft workflow.

See [Chapter 25, "Processing Worklist Items," page 367.](#)

Resources

Upon entering the workbench, the Resources scroll area displays a summary-level, collapsed row for each resource in the resource group that you specify on the My Workbench Options - Utilization page. If you do not select a default resource group, no resource rows appear in the work space. You can select a different resource group at any time to change the resources who appear on this page.

For each resource, you can view:

- Visual indicators.

- Summary information about the resource’s current assignment.
- Resource request actions.

Visual Indicators

Each resource row in the work space has a visual indicator that depicts the resource’s assignment status. This helps determine which resources need your attention first.



The corresponding resource is currently assigned.



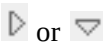
The corresponding resource may soon be available for a new assignment. This visual indicator appears if the resource’s assignment end date falls within the number of days from the current day that you specify on the My Workbench Options - Utilization page.



The corresponding resource is unassigned. If the current day is a workday as specified on the resource’s profile, the system determines if the resource has a task scheduled that day. If the current day is not a workday, the system determines if the resource has a task scheduled on the next workday. If no task is scheduled, the resource is treated as unassigned and this visual indicator appears.

Resource Summary Rows

Rows in the Resources work space are collapsed when you enter the page. These rows provide resource summary information.



Click to expand or collapse individual resource rows. Expanded rows display information about resource requests that are associated with a resource.



Click to sort the list of resources by the corresponding column heading in ascending or descending order.

Resource Name

Click the resource name link to open the resource profile in a new browser window. To return to the Staffing Workbench, either close the resource profile browser window or click in the Staffing Workbench window.

See [Chapter 18, “Maintaining Resource Profiles,” Reviewing Resource Profiles, page 228.](#)

Bill Rate

Displays the resource’s bill rate and currency as specified for the resource’s employee ID. If no bill rate is specified for the employee ID, the value is the rate that is associated with the job code in the Job Code Rates table (PC_RATE_JOBC). If neither value exists, the bill rate value is \$0.0000.

Descr (description)

Displays the resource’s current status as:

Unassigned: The resource is not currently working on an assignment.

Assignment Ending: The resource is currently on an assignment that is ending within the number of days specified on the My Workbench Options - Utilization page.

<Task category>: The resource is currently working on an assignment with this task category, and the latest assignment end date is beyond the number of days specified for ending assignments on the My Workbench Options - Utilization page.

Note. A resource is designated as working on an assignment if the assignment dates overlap the current date—regardless of the assignment status. For example, if a resource is placed on an assignment with the status *Proposed*, and today’s date is between the assignment start and end dates, then this field displays either a task category or the value *Assignment Ending*, based on the assignment end date.

Customer

Displays the customer name that appears on the resource’s current assignment. The field is blank if the resource is not currently working on an assignment.

End Date

Displays the end date of the resource’s current assignment or, if the resource is not currently assigned, the end date of the resource’s most recent assignment. If the assignment includes multiple date ranges, the last end date appears.

Personnel Status

Displays the resource’s personnel status. This column appears only if you allow non-employees to be established as resources.



Click the Monthly Calendar icon to access the resource’s monthly schedule in a new browser window and view the assignments and appointments schedule. Close the browser to return to the workbench, or leave the schedule open and click the workbench window.

See [Chapter 19, “Maintaining Resource Schedules,” Working with Resource Schedules, page 242.](#)



Click the View List of Assignments icon to access the Assignments for <Resource> page in a new browser window and view a list of the resource’s current assignments, bids, recommendations, and assignment history. This information is useful when evaluating the true utilization of resources. Future assignment activity may not appear on a resource’s schedule, depending on the assignment status.



Click the Create Assignment icon to access the Assign Resource page with the resource’s name populated on the page. This icon appears only for users with permission to create assignments.

You can create an assignment for the resource and click Save, or click Cancel to return to the Staffing Workbench without creating an assignment.

Resource Request Rows

When you expand resource summary rows, they display basic information about resource requests that are associated with the resource, the resource’s factor fit scores for the request, the request dates, role, and customer, and a link to the request.

A resource request may appear in the expanded row if:

- The Resource Match engine returns the resource request in a search.

- You retrieve bids and recommendation for the resource request.
- You add the resource request to the resource row.

A more detailed discussion of the information that appears for each resource request row appears later in this chapter.

See [Chapter 24, “Managing Resource Utilization,” Evaluating Resource Requests, page 359.](#)

Filtering and Expanding the Resource List

You can choose a filter, located under Hello <User Name> on the Staffing Workbench - Manage Utilization page, to view subsets of the resources in the work space. Filters control the number of resources who appear in the Resources scroll area or in the chart views. When you select a filter that limits the list of resources, such as resources who are unassigned, the resources who do not meet the filter criteria do not appear in the list or chart. The number of resources who are included in a filter appears next to the filter name.

If you are a member of the selected resource group, you can select an option on the My Workbench Options - Utilization page to include your name in the list of resources.

All	Click to view all resources who belong to the specified resource group. This filter provides a snapshot of the assignment status of all members of the resource group, regardless of whether the resources are currently on assignment.
Unassigned	Click to view a subset of resources who are not working on an assignment at the time.
Ending Assignments	Click to view a subset of resources who are currently on an assignment that is ending within the number of days that you specify on the My Workbench Options - Utilization page.
Selected Resources	Click after selecting the check box beside the resources that you want to appear in the Resources work space. To remove another resource from this filter, clear the resource check box and click Selected Resources again.

You can use the toolbar—located just above and below the Resources scroll area—to expand all resource rows so that you can view or act on resource requests that are associated with the resources. You can also display results from the Resource Match engine, retrieve bids and recommendations, or clear the requests from the work space and start again.



Click Select All to select all resources who appear in the work space.



Click Deselect All to deselect all resources who appear in the work space.



Click Expand All to expand all resource summary rows in the work space.



Click Collapse All to collapse all resource summary rows in the work space.

When you enter the Staffing Workbench - Manage Utilization page, the list of resources appears in a grid format. You can switch to a chart format at any time and then switch back to the grid format. The same resources appear regardless of the view that you select. If you select a different filter while any chart view is active, the resources in the chart view reflect the new filter.

A more detailed discussion of charts appears later in this chapter.

See [Chapter 24, “Managing Resource Utilization,” Reviewing Utilization Charts, page 360.](#)



Click Resources Grid to view the list of resources in a grid format in the Resources work space.

This is the default view for the Staffing Workbench - Manage Utilization page. The icon appears only if the active view is not the Resources grid.



Click Unassigned Resources to view the Unassigned Resources chart—a graphical representation of the assignment status of resources who appear in the active filter. The icon appears only if the active view is not the Unassigned Resources chart.



Click Chart Resource Schedules to view the Resource Schedule chart—a graphical representation of the schedules for the resources who appear in the active filter. The icon appears only if the active view is not the Resource Schedule chart.



Click Scheduled Utilization to view the Scheduled Utilization chart—a graphical representation of scheduled utilization and optimal capacity for the resources who appear in the active filter. The icon appears only if the active view is not the Scheduled Utilization chart.

When you enter the page, the resources that you specify on the My Workbench Options - Workbench page appear in the work space. You can select a different active resource group from the Resource Group ID options. You can also access the Resource Group Definition - Resource Groups page to modify or add a resource group and return to the Staffing Workbench.

Resource Group ID

Enter a new group of resources to populate the Resources work space. If actions are pending on existing resources in the work space, you are prompted to save the actions before proceeding.

All of the resources in the work space are replaced with the resources in the new resource group.

Searching for Assignments for Resources

There are three ways to find resource requests that are appropriate for available resources on the Staffing Workbench:

- Retrieve resource requests for the selected rows based on search options and each resource's factor fit scores for the request.

This feature uses the Resource Match engine to find resource requests that match the qualifications, availability, and preferences of the selected resources.

- Retrieve resource requests for which the selected resources are recommended or for which they have entered a bid.
- Add a resource request to a resource row.

These toolbar icons invoke a search for resource requests and the visual indicators appear when a resource request matches the search criteria:



Click Search for Requests for selected Resources to retrieve open resource requests for the selected resources based on search options and each resource's factor fit scores for the request. Specify search options at search time. The Resource Match engine calculates factor fit scores for each resource-and-resource-request combination.

The system returns resource requests that meet the criteria for a resource. The requests appear in the work space with the resource row expanded and a visual indicator that the resource requests are a result of a Resource Match engine search.

A message appears for each selected row stating the number of resource requests that the system finds in the search results for the resource.



Indicates that the corresponding resource request has been returned in the search results from the Resource Match engine.



Click Retrieve Bids and Recommendations for selected Resources to retrieve resource requests for which the selected resources entered a bid or received a recommendation.

The system returns resource requests that meet the criteria. The requests appear in the work space with the resource row expanded and a visual indicator that the resource entered a bid or received a recommendation for the corresponding resource request.



Indicates that the resource entered a bid or received a recommendation for the corresponding resource request. Move the mouse pointer across the visual indicator to view the alternate text, which indicates if the resource submitted a bid or was recommended for the resource request.



Click Clear Unwanted Requests for selected Resources to clear from selected resource rows the resource requests for which no action is selected.

This button appears for each resource row in the work space:

Add Request

Click to add a resource request for a resource row. Select the resource request and return to the workbench to enter the appropriate action.

The following sections provide more details on how to find work for resources by using the Staffing Workbench:

Retrieve Resource Requests Based on Factor Fit Scores

Expand the Search Options and Search Settings collapsible group boxes on the Staffing Workbench - Manage Utilization page.

Search Options

☒ All Requests ☐ Requests I Own ☐ Owning Organization

Search Settings

The search rates the resource's fit for each assignment by qualifications, preferences, and availability factors. Which resources will be displayed depends on how important each factor type is to you: 5 = extremely important, 0 = not at all important. Click the Search button after making changes to update the list.

Availability: 4 - More impo Preferences: 1 - Much less i Qualifications: 3 - Important Maximum number of assignments to display: 5

Search Options and Search Settings collapsible group boxes on the Staffing Workbench - Manage Utilization page

Note. Search options and search settings apply only when you click Search for Requests for selected Resources to perform a search using the Resource Match engine.

To populate the workbench with resource requests based on a resource's factor fit scores:

- In the Search Options collapsible group box, specify the search options that indicate which resource requests the Resource Match engine needs to evaluate when it searches for work for the resources. You can direct your search to:
 - All Requests: Click to have the Resource Match engine evaluate all open requests as potential matches for the resource.
 - Requests I Own: Click to have the Resource Match engine evaluate open resource requests for service orders that specify you—that is, the user that is logged into the system—as the person responsible for staffing the order.
 - Owning Organization: Click to have the Resource Match engine evaluate open resource requests with a service order owning organization that includes the resource's organization.

For example, if the organizational unit is department, the Resource Match engine evaluates any open resource request that specifies the resource's department or a parent department as the owning organization on the service order.
- In the Search Settings collapsible group box, assign the relative priorities to the Availability, Preferences, and Qualifications factor family fit scores for this search session, and identify the number of results that are to be returned.
- Select the resource rows for which you want to search for resources.
- Click Search for Requests for selected Resources.

If selected resources are matched with resource requests based on the specified search options and the resources' factor fit scores, the resource requests appear in the work space with the row expanded.

The priorities that you specify during the search session are included in each resource's overall fit score calculations. The resource requests appear in descending order of the resource's overall fit score, which measures how well a resource fits the specified qualifications, availability, and preferences; accounting for the organization's priorities; and the priorities that you specify during the search session. If you change the priorities and search again, the Resource Match engine recalculates overall fit scores, which potentially changes the order of resource requests.

See [Chapter 3, "Understanding Resource Matching," The Overall Fit Score, page 35.](#)

Retrieve Resource Requests Based on Resource Bids and Manager Recommendations

To populate the workbench with requests that received a bid from one of your resources or a recommendation for one of your resources:

1. Select the resources for which you want to view bids or recommendations.
2. Click Retrieve Bids and Recommendations.

If selected resources bid or were recommended for requests, the requests appear in the work space with the resource row expanded and a visual indicator that the resource submitted a bid or received a recommendation.

You can submit a recommendation for a resource directly in the resource request or in the Staffing Workbench - Manage Utilization page. A resource can submit a bid for a resource request in the Job Spy page.

Add a Resource Request to the Work Space

Click Add Request on a corresponding resource row to access the Staffing Workbench - Add Request to List page.

Staffing Workbench

Add Request to List

Enter the Business Unit, Service Order ID, and Request Number of the resource request that you want to add to the workspace for this session. If you do not choose a Resource Request number, all of the Resource Requests for the Business Unit/Service Order ID combination will be added.

Business Unit:  JAPAN OPERATIONS

Service Order ID:  Projects Upgrade

Request Number:  PS Projects Experience

Staffing Workbench - Add Request to List page

To directly add resource requests to the work space for a resource:

1. Enter the business unit of the service order that you want to locate.
You must enter the business unit first, because it determines the list of valid service orders.
2. Click the Look up Service Order ID icon to select the service order.
You can search for the service order by the person responsible for staffing it, customer ID or name, description, project, service order ID or status, or by the user ID of the person who created the order.
3. Click Look up Request Number icon to select the resource request.
If no value is selected, all resource requests that are associated with the selected business-unit-and-service-order combination are added to the Resources work space when you click OK.
4. Click OK.

The selected resource requests appear in the work space under the selected resource summary row.

Evaluating Resource Requests

Resource requests that meet the search criteria for a resource appear under the resource summary row.

Resources										Find	First	1-5 of 5	Last
Resource Name		Bill Rate	Status	Customer	End Date	Personnel Status							
☒	Evans, Scooter	350.00	USD	Unassigned	07/30/2004	Non-Empl	  						
Qual.	Avail.	Dates	Role	IDs	Status	Action	Customer	Location					
	95%	100%	03/01/2004 - 07/30/2004	Previous Project Manager	JPN01/ 0000000002/ 1		Tekno-Sporto, Japan Ltd.	Setagayu-ku, 13, JPN					
	 53%	99%	03/12/2004 - 07/30/2004	Project Consultant	JPN01/ 0000000006/ 1		Japan Operations Interunit Customer	Setagaya-ku, 13, JPN					
Add Request		2 search results were returned for this Resource.											

Expanded Resources scroll area on the Staffing Workbench - Manage Utilization page

If selected resources are matched with resource requests based on the specified search options and the resource’s factor fit scores, the requests appear in the work space with the row expanded. You can click Selected Resources to hide all other resource rows from view.

Expanded rows display basic information about resource requests, the resource’s factor fit scores for the request, the assignment status (if applicable), and a link to the resource request.

Qual. (qualification) and **Avail.** (availability)

Displays the Qualification and Availability factor family fit scores, which indicate how closely the resource’s profile and schedule match the resource request.

Click either fit score link to access the Job Scorecard for <Resource> page and view details about requirements that are included in the resource’s fit score calculation for each factor family.

See Chapter 20, “Assigning Resources,” Viewing the Job Scorecard, page 274.

Dates

Displays the start date and end date of the resource request. If multiple date ranges are indicated on the request, this column displays the earliest start date and latest end date of the indicated date ranges.

Role

Displays the project role specified on the resource request.

IDs

Displays a concatenation of the service order business unit, the service order ID, and the resource request ID.

Click the ID link to access the service order and view the order information. Depending on your security access, you can recommend the resource for the resource request. To return to the Staffing Workbench, click Save on the Order Summary or Resource Requests page, or click Return to Staffing Workbench.

Status

Displays the assignment status if the resource is assigned to the resource request during the current search session. Otherwise, the column indicates that the resource is being considered for this resource request, or is blank.

Considering: This value appears if you saved an action to consider this resource as a possible match for the resource request. An assignment is not

created when you consider a resource for a resource request, and therefore a value of *Considering* in this field is not treated as an assignment status.

Action

Select the appropriate action to take on the resource. Available values are based on the resource's current assignment status and your user role security. Values are:

Assign: Assign the resource to the resource request. The assignment appears on the confirmation pages for you to edit and verify.

If assignment approval workflow is enabled, the assignment is automatically routed to the resource's manager for approval after you save and confirm the actions on the workbench. If assignment approval workflow is not enabled, or if the user that is logged into the system is the resource's manager, the assignment can be saved with the status *Assigned* without triggering assignment approval workflow.

Interview, Propose, or Reserve: Create an assignment for the selected resource as soon as you save the actions on the workbench. The assignment appears on the confirmation pages for you to edit and verify.

Consider or Recommend: Associate the resource with the resource request as one that you are considering as a possible match, or recommending for the resource request. These are not assignment statuses. An assignment is not created if you select one of these values. If you don't have the security access to create assignments, *Consider* and *Recommend* are the only available actions.

Cancel: Cancel an existing assignment.

Complete: Complete an assignment that is in an *Assigned* status.

See [Chapter 20, "Assigning Resources," Assignment Statuses, page 254](#).

Customer

Displays the customer name that is specified on the service order.

Location

Displays the assignment location that is specified on the resource request.

Reviewing Utilization Charts

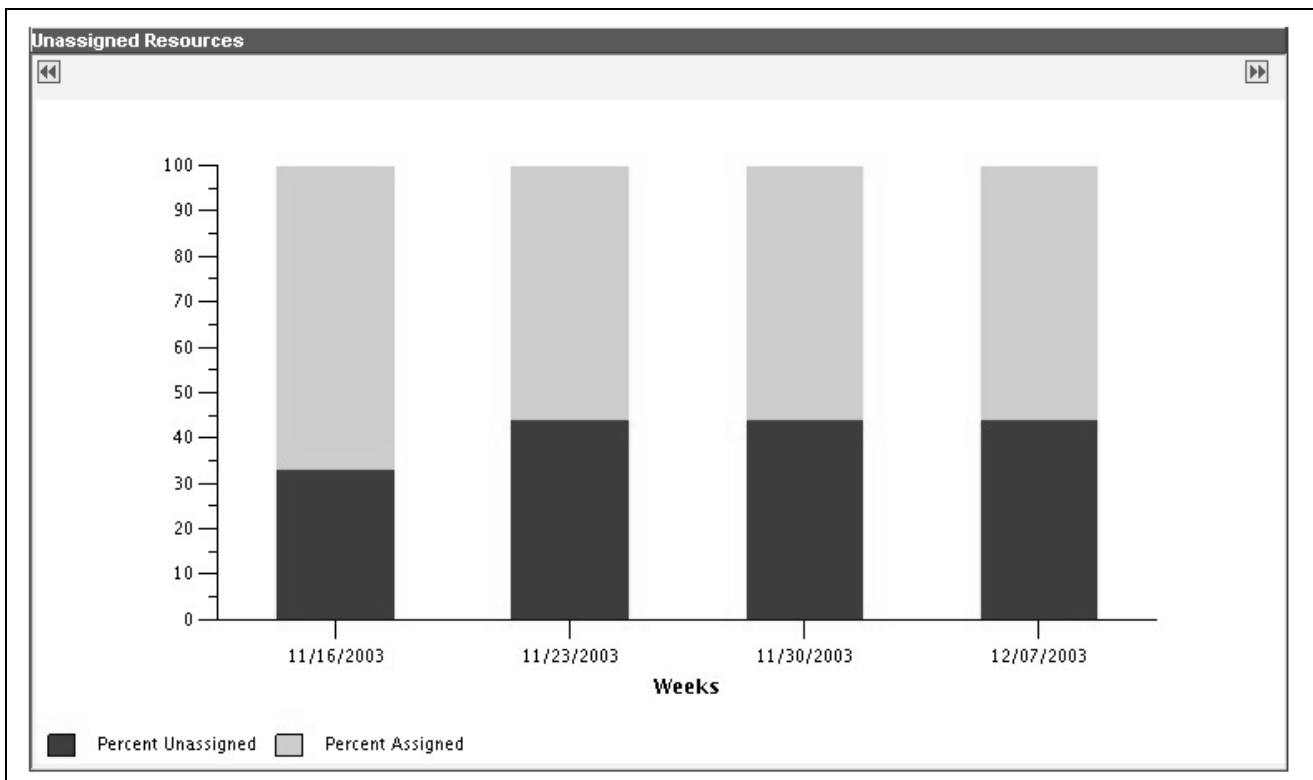
PeopleSoft Resource Management provides real-time analyses that you can view from the workbench to aid in managing utilization of resources. All views on this page contain the resources who appear in the active filter—all resources, unassigned resources, resources with ending assignments, or only selected resources. If you select a filter while the Resources scroll area is active and then you switch to a chart view, the same filter is used to display resources in the chart. If you view a chart view and select a new filter, then revert back to the Resources scroll area, the new filter appears in the scroll area.

From the workbench, you can view graphical representations of:

- Unassigned resources.
- Resource schedules.
- Scheduled utilization.

Unassigned Resources Chart

Access the Unassigned Resources chart view on the Staffing Workbench - Manage Utilization page.



Unassigned Resources chart view

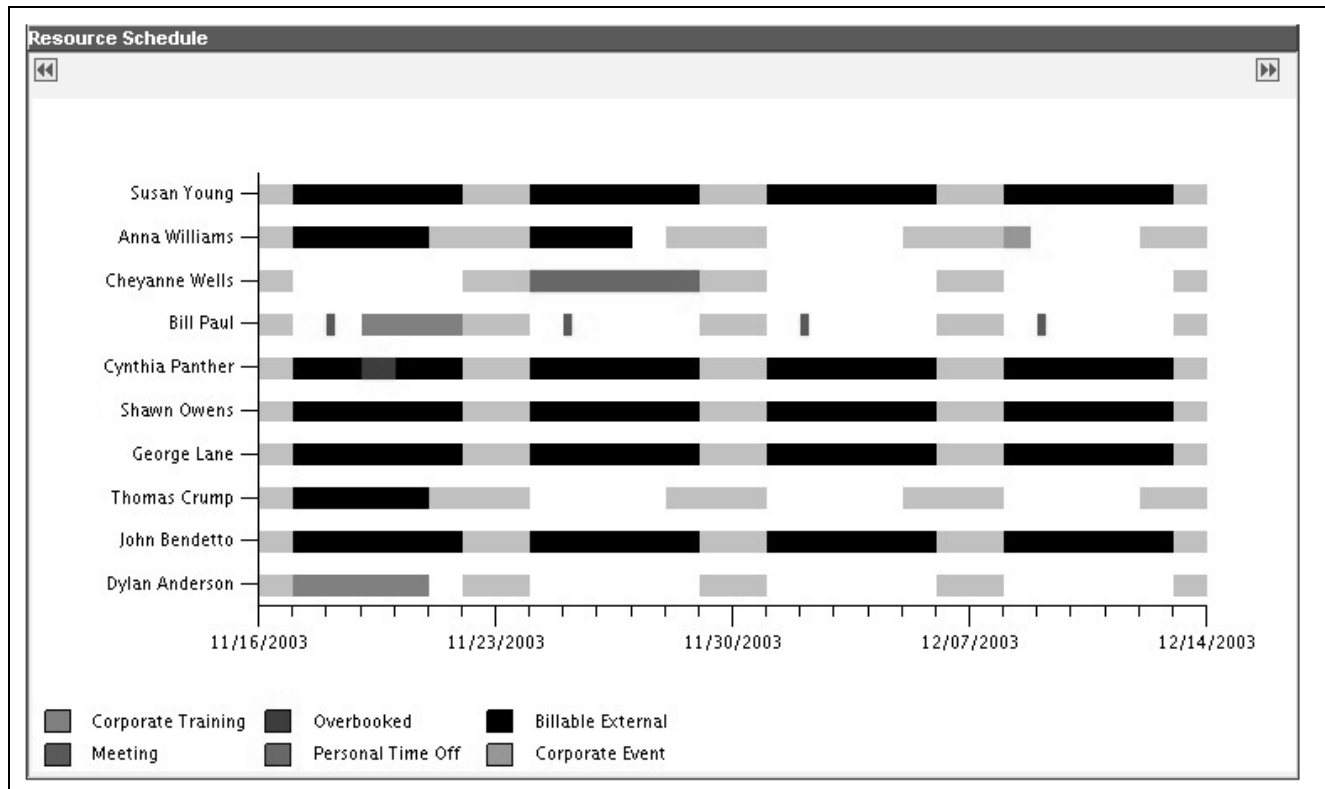
The Unassigned Resources chart represents the assignment status of the resources who appear in the active filter. You specify the threshold on the My Workbench Options - Utilization page that determines when a worker is treated as assigned. The chart displays the percentages of resources who are assigned and unassigned for the next four weeks, with navigation icons to scroll to the next or previous four-week period.

Move the mouse pointer across each bar section to view alternate text about the number of resources assigned (the yellow portion of the bar) or unassigned (the red portion of the bar).

Click the assigned or unassigned portion of a bar to return to the Resources scroll area with the Selected Resources filter active and the resource rows selected for all of the resources included in that portion of the bar.

Resource Schedule Chart

Access the Resource Schedule chart view on the Staffing Workbench - Manage Utilization page.



Resource Schedule chart view

The Resource Schedule chart represents the schedules of the resources who appear in the active filter. The chart displays schedules for a four-week period beginning with the current date, and navigation icons to scroll to the next or previous four-week period.

You specify task categories and corresponding chart colors on the My Workbench Options - Utilization page. If there are no task categories specified on the My Workbench Options - Utilization page, the Resource Schedule chart displays the default task categories and colors that are specified during implementation on the Installation Options - Resource Management page.

Move the mouse pointer across each chart section to view alternate text about the unavailable time (gray), available time (white), or overbooked time (red) for that period. Move the mouse pointer over a task on the chart to view alternate text about the customer name and assignment, or the appointment description.

Click an assignment task bar to access the Assign Resource page. View or modify the assignment as required, and save your changes to return to the workbench.

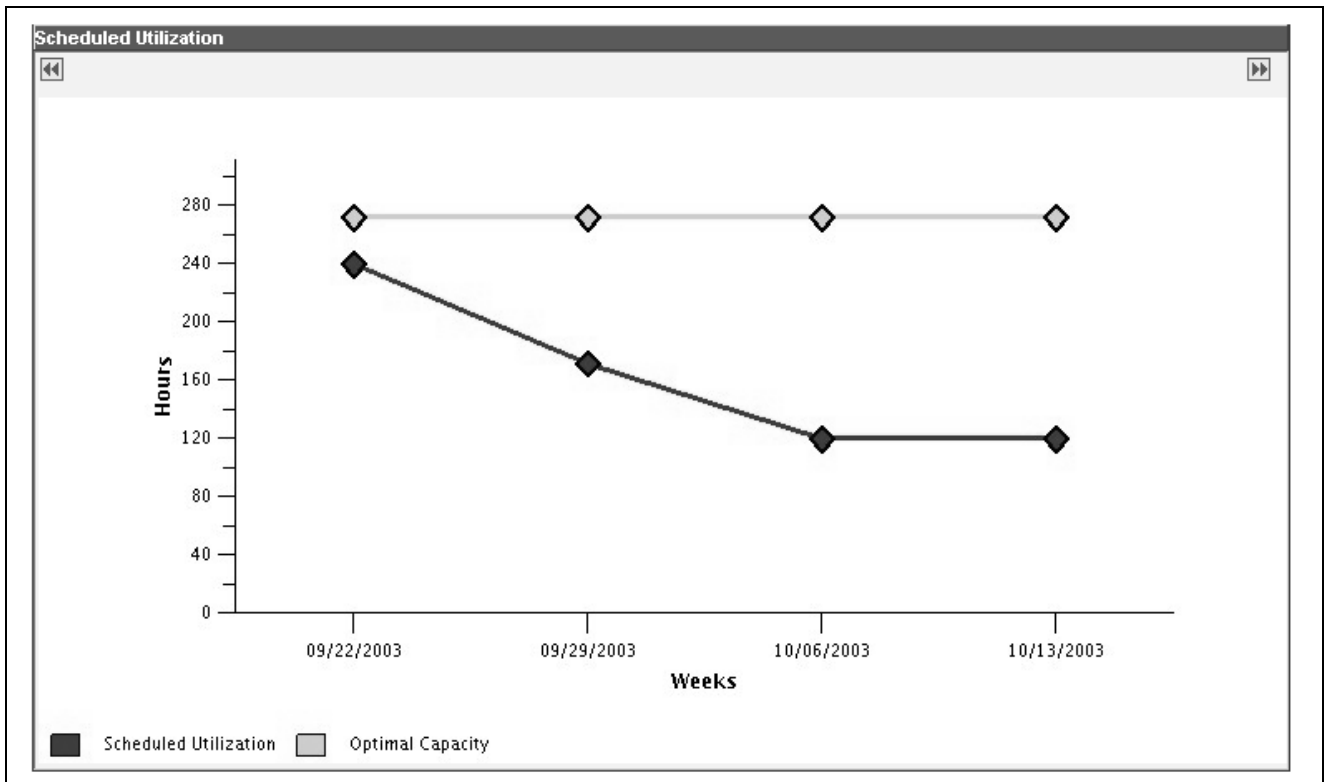
Click the overbooked time to access the Assignments for <Resource> page to view a list of the resource's existing assignments in any status. Click Cancel to return to the workbench.

Click an appointment task bar to access the Appointment Details page. You can view the appointment and click Cancel to return to the workbench, or modify the appointment and save your changes to return to the workbench.

Click the unassigned portion of the chart to return to the Resources scroll area with the Selected Resources filter active and the resource row for the applicable resource selected.

Scheduled Utilization

Access the Scheduled Utilization chart view on the Staffing Workbench - Manage Utilization page.



Scheduled Utilization chart view

The Scheduled Utilization chart compares the scheduled utilization with the optimal capacity for the resources who are included in the active filter.

Utilization represents the total number of hours that the resources on the chart are scheduled to work—or have already worked—during the chart period on the tasks designated as utilized time. You select the task categories to include in the analysis on the My Workbench Options - Utilization page.

Capacity is the total number of hours that the resources are available to work in the chart period as defined by the Standard Hours field (STD_HOURS) on the Job record (JOB) for the employee. On the My Workbench Options - Utilization page, you specify the percentage of capacity that is required for a resource to be treated as optimally utilized.

The chart displays hours for a four-week period beginning with the current date, and navigation icons to scroll to the next or previous four-week period.

Move the mouse pointer across the chart to view alternate text about the scheduled utilization hours (red) and optimal capacity hours (yellow) for the chart period for the resources who appear in the work space.

Performing Actions

To perform an action on the Staffing Workbench - Manage Utilization page:

1. In the Resources scroll area of the grid view, select the check box for the resource summary rows on which you want to perform an action.
2. Enter a corresponding action value for the resource-and-resource-request combinations for selected resource summary rows.
3. Click Save Actions for all selected items to perform the actions on the selected resource summary rows.

Note. When you save actions on one workbench page, the unsaved actions are performed on all workbench pages. For example, if you have access to the Staffing Workbench - Manage Utilization page and the Staffing Workbench - Fulfill Resources page, any actions that you select for a resource-and-resource-request combination on either page are performed when you save either page. The actions from both pages are listed on the Staffing Changes Confirmation page and the Update Confirmation page.

When you save the work space and accept the confirmation pages:

- If there is no existing assignment for this resource-and-resource-request combination, and if you selected an action status of *Assign*, the system:
 - Creates a new assignment with the indicated status if assignment approval workflow is not enabled, or if the user that is logged into the system is the resource's manager.
 - Automatically routes the assignment to the resource's manager for approval if assignment approval workflow is enabled.
- If there is no existing assignment for the resource-and-resource-request combination, and if you selected an action status of *Interview*, *Propose*, or *Reserve*, the system creates a new assignment with the indicated status.
- If you selected an action status of *Recommend*, the system associates this resource with the resource request as a recommendation. The recommendation appears:
 - On the Service Order - Recommend Resources page on the resource request.
 - In the Recommendations filter on the Assignments for <Resource> page.
 - In the Recommendations filter on the My Assignments - Assignments page.
 - In the Requests work space on the Staffing Workbench - Fulfill Orders page when you retrieve resources based on recommendations.
 - In the Resources work space on the Staffing Workbench - Manage Utilization page when you retrieve resource requests based on recommended resources.
- If you selected an action status of *Consider*, the system saves the record to associate this resource with the resource request as a possible candidate.

An assignment is not created for an action status of *Consider*.

Note. resources who have the status *Consider* are only associated with the resource request on the Staffing Workbench. This information does not appear anywhere else in the system. These resources appear in the workbench each time the resource request appears until their status changes or the associated resource request is closed or canceled.

- If the resource is already assigned to this resource request, the system updates the assignment with the new status.

Confirming Actions

When you save the actions on the Staffing Workbench, the Staffing Changes Confirmation page appears and explains the changes to be made for every selected resource. When you accept the changes, the Update Confirmation page appears and confirms that the changes were successful.

Use these pages to confirm that:

- An assignment will be created for an action of *Assign*, *Interview*, *Propose*, or *Reserve* for a resource who is not already assigned to this resource request
- If assignment approval is required, the status of the assignment changes to *Pending Approval*.
- The status of an existing assignment for a resource is changed according to the specified action.
- Any workflow that is associated with the status change is invoked when you confirm the staffing changes.
- Assignment history is updated when you confirm the staffing changes.

Note. You can change the assignment default values that appear on the Staffing Changes Confirmation page.

Staffing Changes Confirmation

Access the Staffing Changes Confirmation page.

Note. The information that appears on the Staffing Changes Confirmation page and Update Confirmation page differs based on the source of the action. If you initiate an action from the Staffing Workbench - Manage Utilization page, the resource description appears at the top of the update section on the confirmation pages. If you initiate an action from the Staffing Workbench - Fulfill Orders page, the resource request description appears at the top of the update section on the confirmation pages.

The system displays a summary of the changes for each resource row that is selected at save time. If there are no changes for a selected row, the message No actions indicated for this Resource appears.

You can modify the assignment values that appear on the Staffing Changes Confirmation page.

Update	Select to confirm the change and update the assignment, resource request, resource schedule, and other workflow. Clear this check box to cancel the updates. The check box is selected by default.
Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday	View the default or existing work days for the assignment, and modify as needed by selecting or clearing the appropriate check boxes.
Start Date and End Date	View the default or existing dates for the assignment, and modify as needed. To accommodate a noncontiguous schedule, add a row for each nonconsecutive start and end date range for a single assignment.
Start Time and Hrs (hours)	View the default or existing start time and hours for the assignment, and modify as needed.
Description	Enter the assignment description.
OK	Click to save the specified actions and access the Update Confirmation page.

Update Confirmation

Access the Update Confirmation page.

Verify the changes and confirm that they occurred as expected. Click Return to Staffing Workbench to return to the work space and view the changes.

Assignments that are created from in the Staffing Workbench are populated with values from the resource request, and the system places the resource on the assignment with the designated action status. New assignment statuses for the resources appear in the Status column on the associated resource request rows in the Resources scroll area until you refresh the workbench.

Note. If you select the action *Assign* and assignment approval is required, the assignment status is *Pending Approval* if you view the assignment from the Staffing Workbench - Fulfill Orders page, Assignments for <Resource> page, or Assign Resource page. The assignment remains in a pending status until it is approved by the resource's manager or canceled.

CHAPTER 25

Processing Worklist Items

This chapter provides an overview of the worklist and discusses how to process worklist items.

Understanding the Worklist

A worklist is an organized list of the work items that need to be addressed. PeopleSoft Resource Management workbenches—the Staffing Workbench component and the My Assignments component—contain a Worklist page that displays notifications and actions that are added to the page from PeopleSoft workflow processes. A link to the worklist appears at the top of the workbench to alert you to outstanding items. From the worklist, you can access item details, complete the required actions, and mark items complete.

You can select a item to work on, and the item provides access to the pages that you need. This enables you to bypass other navigation and work directly from the worklist. The target page that appears when you select an item is based on the type of activity that you perform. For example, if you are a resource manager and you receive notification that an assignment date changed for one of your resource's, you access the Assign Resource (approval) page from the worklist if assignment approval workflow is enabled.

The worklist items that appear are based on workflow options that are specified during implementation. Each worklist item identifies the action that generated the workflow. For example, an action of *Recommendation Made* appears on the resource's worklist when a manager recommends the resource to fulfill a resource request.

This table lists PeopleSoft Resource Management worklist actions, a description of the action, the user who typically performs the actions, and the target pages that appear when users select an item:

Worklist Action	Description	User	Target Pages
New Assignment For Approval	Assignment requires approval by the resource manager.	Resource Manager	Assign Resource approval page (RS_ASSIGN_APRVL)
Date Change For Approval	Assignment schedule change requires approval by the resource manager.	Resource Manager	Assign Resource approval page
Status Change For Approval	Assignment status change requires approval by the resource manager.	Resource Manager	Assign Resource approval page
New Assignment Created	Notification of new assignment.	Resource	Assign Resource review and schedule update page (RS_ASSIGN_UPDDTS)

Worklist Action	Description	User	Target Pages
Assignment Status Change	Notification of assignment status change.	Resource	Assign Resource review and schedule update page
Assignment Date Change	Notification of assignment schedule change.	Resource	Assign Resource review and schedule update page
Recommendation Made	Notification of a resource recommendation to fulfill a resource request.	Resource	Job Detail page (RS_WRKR_JOBINFO)
Route to Staffing Person	Service order is ready for fulfillment by the person responsible for staffing the order.	Staffing Coordinator	Order Summary page (RS_SO_SUMMARY)

PeopleTools also provides a worklist that you can access from the folder navigation or from the Worklist link in the PeopleSoft universal navigation header. The same worklist items appear on all worklist pages, and you can view and process items from any worklist. The advantage of the PeopleSoft Resource Management worklist is that you can easily alternate between the worklist and other workbench pages. The advantage of the PeopleTools worklist pages is that you can format or filter the list of items, assign a priority to each item, reassign items, and view additional details.

Processing Worklist Items

This section discusses how to use the worklist.

Pages Used to Process Worklist Items

Page Name	Object Name	Navigation	Usage
Worklist	RS_MYWORKLIST	You can access the Worklist page through multiple navigation paths. This list presents five frequently used paths. • Resource Management, Staffing Workbench, Worklist • Resource Management, Staffing Workbench, Fulfill Orders Click You currently have <n> unworked items in your worklist on the Staffing Workbench - Fulfill Orders page. • Resource Management, Staffing Workbench, Manage Utilization Click You currently have <n> unworked items in your worklist on the Staffing Workbench - Manage Utilization page. • Resource Management, My Assignments, Worklist • Resource Management, My Assignments, Assignments Click You currently have <n> unworked items in your worklist on the My Assignments - Assignments page.	Review and process assigned worklist items.
Worklist - Worklist for <User ID>: <Resource>	WORKLIST	• Worklist, Worklist, Worklist for <User ID>: <Resource> • Click Worklist from the PeopleSoft universal navigation header. • Click Summary View from the Worklist Details - Worklist for <User ID>: <Resource> page.	View, assign priority, reassign, and process worklist items.

Page Name	Object Name	Navigation	Usage
Worklist Details - Worklist for <User ID>: <Resource>	WORKLIST_DETAILS	- Worklist, Worklist Details, Worklist for <User ID>: <Resource> - Click Detail View from the Worklist - Worklist for <User ID>: <Resource> page.	Review additional information about items on a worklist.

Reviewing and Processing Worklist Items

Access the Worklist page.

Fulfill Orders Manage Utilization Worklist																																			
Hello , Kenneth Schumacher																																			
Worklist Find View All  First 1-4 of 4 Last <table> <tr> <th>Description</th><th>Date From</th><th>Due Date</th><th>Action</th><th>Link</th><th>Mark Worked</th></tr> <tr> <td>Edward Ng</td><td>11/16/2003</td><td>11/16/2003</td><td>New Assignment For Approval</td><td>Details</td><td>☒</td></tr> <tr> <td>Edward Ng</td><td>11/16/2003</td><td>11/16/2003</td><td>Recommendation Made</td><td>Details</td><td>☒</td></tr> <tr> <td>Theresa Monroe</td><td>11/11/2003</td><td>11/11/2003</td><td>Route to Staffing Person</td><td>Details</td><td>☒</td></tr> <tr> <td>Kenneth Schumacher</td><td>11/15/2003</td><td>11/15/2003</td><td>Route to Staffing Person</td><td>Details</td><td>☒</td></tr> </table>						Description	Date From	Due Date	Action	Link	Mark Worked	Edward Ng	11/16/2003	11/16/2003	New Assignment For Approval	Details	☒	Edward Ng	11/16/2003	11/16/2003	Recommendation Made	Details	☒	Theresa Monroe	11/11/2003	11/11/2003	Route to Staffing Person	Details	☒	Kenneth Schumacher	11/15/2003	11/15/2003	Route to Staffing Person	Details	☒
Description	Date From	Due Date	Action	Link	Mark Worked																														
Edward Ng	11/16/2003	11/16/2003	New Assignment For Approval	Details	☒																														
Edward Ng	11/16/2003	11/16/2003	Recommendation Made	Details	☒																														
Theresa Monroe	11/11/2003	11/11/2003	Route to Staffing Person	Details	☒																														
Kenneth Schumacher	11/15/2003	11/15/2003	Route to Staffing Person	Details	☒																														

Staffing Workbench - Worklist page

A variety of worklist items can appear, including items that originate from sources other than PeopleSoft Resource Management. By default, all work items assigned to you are visible from the oldest to the newest. Click the column headings to sort the work items.

Description	Displays the individual who triggered the work item.
Date From	Displays the date when the work item was triggered.
Due Date	Displays the due date of the specified action.
Action	Displays the action that generated the workflow item. You can have multiple entries with the same action, but each entry represents a different item that requires attention.
Details	Click to access the target page—the page where you work on the item. The target page is specific to the type of activity that you perform. For example, if the action is <i>Recommendation Made</i> , the link accesses the Job Detail page, where you can view information about the resource request.
Mark Worked	Click to mark an item as worked if you have performed the necessary actions. This removes items that PeopleSoft Resource Management workflow processes generates.

Note. The worklist may contain items that are generated by workflow processes from other PeopleSoft applications. Depending on how the worklist item is defined, there are different requirements for the actions that must be performed before the item can be removed from the worklist.

See “Using Workflow” in *Using PeopleSoft Applications PeopleBook*.

Summary View

You can access a summary view of the PeopleSoft worklist from the folder navigation or from the Worklist link in the PeopleSoft universal navigation header. In addition to viewing and processing worklist items, on this page you can hide or rearrange grid columns, filter the items in the view, reassign worklist items, and assign a priority to each worklist item.

Use the PeopleSoft folder navigation to return to the workbench.

Detail View

From the worklist summary view you can drill down to a worklist detail view. In addition to the fields and buttons that are available on the summary view, the detail view includes supplemental information about each item, such as the date and time that you first selected the item to work on, and comments that another user entered if the item was forwarded to you.

Use the PeopleSoft folder navigation to return to the workbench.

See Also

“Using Workflow” chapter in the *Using PeopleSoft Applications PeopleBook*

CHAPTER 26

Using the Resource Self-Service Feature

This chapter provides an overview of the My Assignments feature and discusses how to:

- Specify My Assignments options.
- Work with assignments.
- Work with the Job Spy feature.
- Manage a worklist.

Understanding the My Assignments Feature

Other chapters in this PeopleBook discuss workbenches that are designed primarily for staffing coordinators, resource managers, or practice managers to fulfill customer requests and manage resource utilization. As a resource, you also have a uniquely designed workbench containing the tools that you need to review existing assignments and seek new ones.

This section discusses:

- My Assignments Feature.
- Job Spy feature.

My Assignments Feature

The My Assignments feature presents a self-service view of PeopleSoft Resource Management data that is specific to a resource. You can review and act on existing or potential assignments on three pages:

- The My Assignments - Assignments page presents assignment-related information with views that display existing assignments, bids, recommendations, and assignment history.

It is the first page that appears when you access the My Assignments component. The page also displays optional, scaled-down versions of PeopleSoft Resource Management charts that you select as workbench display options.

- The My Assignments - Job Spy page displays open resource requests that match your qualifications, preferences, and availability. On the My Assignments - Job Spy page, you can review detailed information about an opportunity and submit a bid for the job.
- The My Assignments - Worklist page provides a list of worklist items for your attention.

Job Spy

The Job Spy feature is a PeopleSoft Resource Management tool that resources can use to proactively seek new assignments. This feature uses the Resource Matching feature to provide a ranked list of open resource requests that match the resource's profile and schedule, as well as the weighting specified for the Availability, Qualification, and Preference factor families. You can search through all resource requests or only the requests with a service order owning organization that includes your organization. Once the search results appear, you can drill down and access the Job Detail page to view details of any resource requests in the work space. You can also access the Job Scorecard page to view a detailed evaluation of your qualifications, availability, and preferences compared to resource requests.

Using the Job Spy feature, you can bid on an assignment for the resource request. Bids influence the staffing process in two ways:

- Staffing coordinators, resource managers, and practice managers can view a list of resources who submit bids for a particular resource request, and they can consider the bids when making their staffing decisions.
- Bids influence the Preference family factor fit score that is returned by the Resource Matching feature when a staffing coordinator or manager searches for resources to fulfill resource requests.

A resource who submits a bid for a particular resource request may have a higher overall fit score than a resource who is equally qualified and available but does not submit a bid.

Specifying My Assignments Options

To specify My Assignments options, use the My Assignments Options component (RS_MYASSGN_OPT).

This section discusses how to select resource charts and parameters.

Page Used to Specify My Assignments Options

Page Name	Object Name	Navigation	Usage
My Assignments Options	RS_MYASSGN_OPT	• Resource Management, Define User Options, My Assignments Options, My Assignments Options • Set Up Financials/Supply Chain, Product Related, Resource Management, My Assignments Options, My Assignments Options	Select resource charts and parameters to appear in the My Assignments component for the user.

Selecting Resource Charts and Parameters

Access the My Assignments Options page.

My Assignments Options

Operator Id: RS00000006

Select Charts

Select one or more charts to be included at the bottom of your dashboard by clicking on the box next to the chart title. If you choose "Scheduled Utilization" chart there are some additional default parameters you will need to specify below.

☒ Weekly Schedule

☒ Chart Resource Schedules

☒ Scheduled Utilization

Enter what you consider to be your optimal utilization percentage as a whole number. For instance, if billing 80% of your work hours is optimal for you, enter 80 here.

Optimal Utilization Ratio:

75.000

My Assignments Options page

Operator Id	Displays the user ID of the resource who has logged in to the session.
Weekly Schedule	Select to display your weekly schedule on the My Assignments - Assignments page.
Chart Resource Schedules	Select to display a Gantt chart of your four-week schedule on the My Assignments - Assignments page.
Scheduled Utilization	Select to display a chart of your personal four-week scheduled utilization on the My Assignments - Assignments page. If you select this option, you must enter a value in the Optimal Utilization Ratio field.
Optimal Utilization Ratio	Enter the percentage of capacity required for you to be treated as optimally utilized on the Scheduled Utilization chart. Enter a whole number. For example, <i>80</i> indicates that you must be at least 80 percent utilized for the system to treat you as optimally utilized. This field is required if you select the Scheduled Utilization chart to appear on the My Assignments - Assignments page.

Working with Assignments

This section discusses how to:

- Review your assignments.
- Filter the assignment list.
- View assignment details.
- View resource request job details.

- Send comments to your manager.
- View your resource schedule and utilization charts.

Pages Used to Work with Assignments

Page Name	Object Name	Navigation	Usage
My Assignments - Assignments	RS_MYASSIGNMENTS	Resource Management, My Assignments, Assignments	Review your existing assignments and send comments to your manager.
Assign Resource	RS_ASSIGN_UPDDTS, RS_ASSIGN_MAIN	• Click Detail on an assignment row in the Current or History filter on the My Assignments - Assignments page. • Resource Management, My Assignments, Worklist Click Details for an assignment notification worklist item on the Worklist page. • Resource Management, Assign Resource	Review and modify information about an assignment, based on the security access of your user role. Note. Resources have access to only their assignments.
Job Detail	RS_WRKR_JOBINFO	• Click Detail on an assignment row in the Bids or Recommendations filter on the My Assignments - Assignments page. • Click Detail on a resource request row on the My Assignments - Job Spy page.	Review information about the service order and resource request.
Job Scorecard for <Resource>	RS_JOB_SCRD_SEC	•  Click View Job Scorecard in the Bids filter or Recommendations filter on the My Assignments - Assignments page. • Resource Management, My Assignments, Job Spy Click a qualification, preferences, or availability score on the Job Spy page.	View resources' fit scores against the requirements that you specify in a search or on a resource request.
Send E-mail to <Manager>	RS_EMAILTEXT_SEC	 Click the E-mail Supervisor button on an assignment row.	Send your manager comments about the associated assignment.

Reviewing Your Assignments

Access the My Assignments - Assignments page.

Assignments Job Spy Worklist

Hello, Scooter Evans You currently have 2 unworked items in your worklist!

[Current\(4\)](#) [Bids\(1\)](#) [Recommendations\(1\)](#) [History\(1\)](#)

Assignments							
	Dates	Role	Description	Location	Status		
	04/01/2004 - 04/08/2004	Functional Analyst	Internal Research Project		Assigned	Detail	
!	03/12/2004 - 07/30/2004	Project Consultant	Proj Consultant - Super Sport	Setagaya-ku, 13, JPN	Proposed	Detail	
●	10/06/2003 - 11/20/2003	Current Project Manager	Manage Project		Assigned	Detail	
	01/06/2003 - 06/30/2003	Database Administrator	Lead tech team		Assigned	Detail	

Current view on the My Assignments - Assignments page

[Current\(4\)](#) [Bids\(1\)](#) [Recommendations\(1\)](#) [History\(1\)](#)

Assignments							
	Dates	Role	Description	Location	Status		
	07/01/2004 - 11/30/2004	Database Administrator	Database Upgrade Experience	Portland, OR, USA	Bid Submitted	Detail	

Bids view on the My Assignments - Assignments page

[Current\(4\)](#) [Bids\(1\)](#) [Recommendations\(1\)](#) [History\(1\)](#)

Assignments							
	Dates	Role	Description	Location	Status		
! x	10/01/2004 - 01/14/2005	Senior Applications Developer	HTML Experience	Durango, CO, USA	Recommendation Submitted	Detail	

Recommendations view on the My Assignments - Assignments page

[Current\(4\)](#) [Bids\(1\)](#) [Recommendations\(1\)](#) [History\(1\)](#)

Assignments							
	Dates	Role	Description	Location	Status		
x	03/01/2004 - 07/30/2004	Previous Project Manager	Resource Mgmt Install Exp	Setagaya-ku, 13, JPN	Canceled	Detail	

History view on the My Assignments - Assignments page

The My Assignments opens to a list of existing assignments. You can drill down to view current or previous assignment details in the Current and History filters. In the Bids and Recommendations filters, you can view summary information or details of resource requests for which you have bid or been recommended. You can also initiate an email message to your manager from any filter. The chart-viewing options that you define on the My Assignments Options page appear at the bottom of the page.

Hello , <User Name>

Displays the user name associated with the user ID.

**You currently have
<Number of Items>
unworked items in your
worklist!**

Click to access the My Assignments - Worklist page, where you can view or process items that are routed to you from workflow. The My Assignments - Worklist page is discussed later in this chapter.

Assignments Work Space

For each row in the Assignments work space, you can view:

- Visual indicators.
- Summary information about an assignment or resource request.

Visual Indicators

Each assignment or resource request row in the work space has one of the following visual indicators:



A worklist item on the My Assignments - Worklist page awaits your attention. The worklist item visual indicator may appear in the Current, Recommendations, or History filter.



This is a current assignment for the resource based on the assignment start and end dates. A *current assignment* is an assignment with a start date equal to or before the current system date and an end date equal to or after the current system date. This visual indicator may appear in the Current or History filter.



Another resource was selected to fulfill a resource request for which you submitted a bid or received a recommendation. This visual indicator appears only in the Bids or Recommendations filter.



This visual indicator may appear in the Recommendations or History filter. In the Recommendations filter, it indicates that the resource request is canceled. In the History filter, it indicates that the assignment is canceled.

Assignment or Resource Request Summary Rows

Rows in the Assignments work space provide the following summary information about assignments (in the Current or History filter), about resource requests for which you have placed a bid (in the Bids filter), or about resource requests for which you have been recommended (in the Recommendations filter).

Dates	Displays the earliest start and latest end date of the date ranges on the assignment.
Role	Displays the role that the resource is fulfilling on the assignment.
Description	Displays the assignment description.
Location	Displays the location of the assignment.
Status	The information contained in this column changes based on the active filter. In the Current or History filter, the column displays your assignment status. In the Bids or Recommendations filter, the column displays the status of your bid or recommendation.
Detail	The destination of this link changes based on the active filter. In the Current or History filter, click Detail to access the Assign Resource page, where you can review assignment details. You can modify the assignment or change assignment dates based on the permissions associated with your user role.

See [Chapter 20, “Assigning Resources,” Creating Assignments, page 264.](#)

In the Bids or Recommendations filter, click Detail to access the Job Detail page to review information about the service order and resource request.

Click Return to My Assignments to return to the workbench with the Current filter active.

See [Chapter 23, “Fulfilling Service Orders,” Viewing Open Resource Requests, page 326.](#)



Click to access your job scorecard and view the detailed evaluation of your qualifications, availability, and preferences compared to the resource request. The job scorecard icon is available if:

- The assignment is associated with a service order, and the assignment start date is earlier than the current date.
- There is no assignment associated with the service order, such as in the Bids filter and Recommendations filter.

On the job scorecard, click Return to return to the workbench.

See [Chapter 20, “Assigning Resources,” Viewing the Job Scorecard, page 274.](#)



Click to access the Send E-Mail to <Manager> page and send a message to your manager regarding the assignment. On the Send E-Mail to <Manager> page, click OK or Cancel to return to the workbench.

Filtering the Assignment List

You can drill down to view current or previous assignment details in the Current and History filters. You can view summary information or details of resource requests for which you have bid or been recommended in the Bids and Recommendations filters.

You can select a filter by clicking one of the links above the Assignments group box. When you select a filter, the rows that do not meet the filter criteria are hidden. The number of assignments or resource requests that are included in a filter appears in parentheses in the link for the filter.

Current

Click to view a list of your assignments with the following statuses:

- *Proposed*
- *Interviewing*
- *Pending Approval*
- *Assigned*

You do not have to be currently working on the assignment for it to appear in this filter.

Bids

Click to view a list of resource requests for which you submitted a bid. A visual indicator appears in this filter if the resource request that you placed a bid for was assigned to another resource. Bids are removed from this filter once an assignment is created for the resource-and-resource request combination.

Recommendations

Click to view a list of resource requests for which you received a recommendation. A visual indicator appears in this filter if the resource

request for which you were recommended was assigned to another resource. Recommendations are removed from this filter once an assignment is created for the resource-and-resource-request combination.

History

Click to view a list of your assignments that have the following statuses:

- *Completed*
- *Canceled*
- *Rejected*

Viewing Assignment Details

Access the Assign Resource page.

Assign Resource

Assignment ID:	0000000212	Description:	Proj Consultant - Super Sport
Name:	Evans,Scooter	Personnel Status:	Non-Empl
Department:	Sales and Services	Manager Name:	George Lane
Project Role:	Project Consultant	Category:	Billable External
Status:	Propose	Responsible For Staffing:	Schumacher,Kenneth

Service Order: [0000000006/1](#)

Customer/Project Information

Business Unit:	JPN01
Project:	0000000165 ESA Implementation
Customer:	JPN99 Japan Operations Interunit Customer
Location:	Main
Location Details	Contact Details

▼ Schedule Detail Dates

Find First 1 of 1 Last

Start Date:	03/12/2004	End Date:	07/30/2004	+	-
Hours:	10.00	Start Time:	8:00:00AM	☐ Extension	
Comments:			Detail Status:	Confirmed	
☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☐ Friday ☐ Saturday ☐ Sunday					
View Conflicts View Monthly Schedule View Schedule Chart					

▶ Schedule Exception Dates

Assign Resource page

On this page, you can view details about the assignment and modify the assignment schedule, based on the security access of your user role.

Click Return to My Assignments to return to the workbench.

Viewing Resource Request Job Details

Access the Job Detail page.

Job Detail

Resource Request: US005 / 0000000007 / 1

(Business Unit / Service Order ID / Resource Request Number)

Status: Open

Logistical Information

Quantity: 3

☐ **Trainees Allowed**

Project Role: Database Administrator

Project Description: Database Upgrade

Description: Database Upgrade Experience

Start Date: 07/01/2004

Late Start Date: 07/01/2004

The resource must start no later than this date.

End Date: 11/30/2004

Estimated days of work: 109

☐ **Partial Days Acceptable**

Contact: Sheila Grady

Email ID: gradys@xxx.net

Phone Numbers

[Customize](#) | [Find](#) | [View All](#) |

First 1 of 1 Last

Phone Type	Int'l Prefix	Telephone	Phone Extension
Business		18889091212	

Job Detail page (1 of 3)

Travel Information:

Housing Information:

Dress Code:

☒ **Trainees Allowed**

Address

Country: USA United States

Address 1: 2710 Mission street

Address 2:

Address 3:

City: Portland

County:

Postal: 97232

State: OR Oregon

Job Detail page (2 of 3)

Qualifications				
Requested Competencies				
Description	Importance	Proficiency	Years of Work Experience	
Programming	Desired	3-Good		
Database Design	Desired	3-Good		
Web Server Administration	Desired	3-Good		
Application Server Admin	Desired	3-Good		
Requested Degrees				
Degree	Major Code	Description	Importance	
Requested Languages				
Language	Importance	Speak	Read	Write
Requested Licenses				
License	Country	Description	Importance	
Requested Memberships				
Membership	Importance			

Job Detail page (3 of 3)

On this page, you can view details about the service order, as well as resource request details such as requirement dates, competencies, accomplishments, qualifications, preferences, and the specified importance of each to the project role.

Sending Comments to Your Manager

Access the Send E-mail to <Manager> page.

Send E-mail to George Lane

You can send your comments regarding this assignment to your manager by entering your comments in the box below, and then clicking on the 'OK' button. If you would like to wait and send your comments later, click on the 'Cancel' button.

George,

I am motivated for this job. Let's talk!

SC

Send E-Mail to <Manager> page

Your manager appears as the addressee on the page. Enter comments about an assignment or resource request. The message includes other pertinent information about the assignment, such as the customer, description, start and end dates, project role, business unit, service order and resource request ID, or work assignment ID.

Note. A supervisor must be defined for a resource on the Update Employee Data - Employee Job page before the resource can send email notifications to a manager.

OK Click to send the message and return to the My Assignments - Assignments page.

Cancel Click to return to the My Assignments - Assignments page without sending or saving the message.

Viewing Your Resource Schedule and Utilization Charts

PeopleSoft Resource Management provides charts that you can view in the workbench in real time. You can select workbench options to display the following charts below the Assignments scroll area:

- Weekly schedule.
- Resource schedule.
- Scheduled utilization.

Weekly Schedule

Your schedule appears for the current week.

12 October 2003 - 18 October 2003 Current Week						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<u>12</u>	<u>13</u> 8:00a Manage Project	<u>14</u> 8:00a Manage Project	<u>15</u> 8:00a Manage Project	<u>16</u> 8:00a Manage Project	<u>17</u>	<u>18</u>

Weekly Schedule chart on the My Assignments - Assignments page

On the weekly schedule, you can:

- Click the right or left arrow to scroll to the next or previous week.
- Click the link for an assignment description to access the Assign Resource page, where you can review assignment details.

You can modify the assignment or change assignment dates, depending on the permissions associated with your user role. Click Return to My Assignments to return to the workbench with the Current filter active.

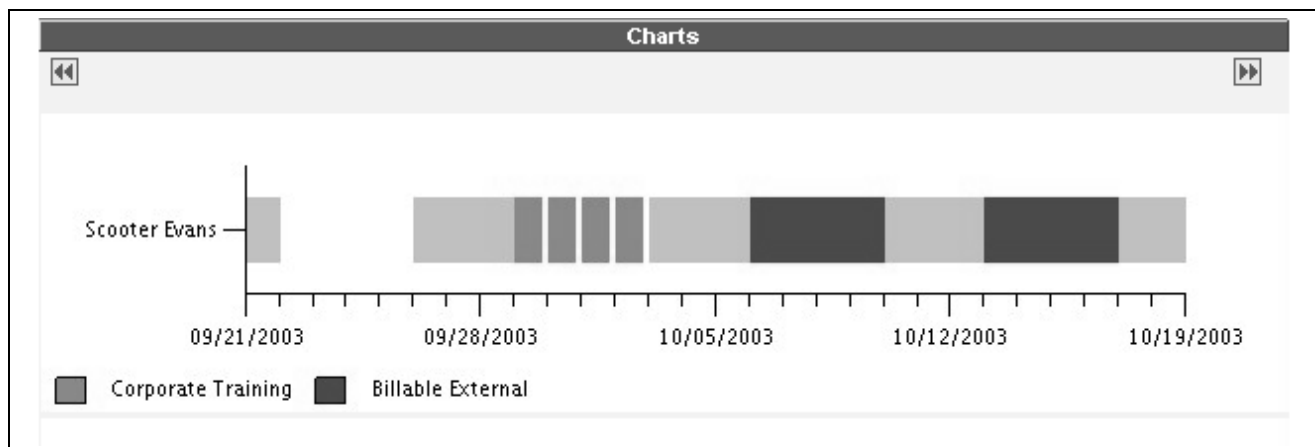
- Click the link for an appointment description to access the Appointment Details page and modify as required.

On the Appointment Details page, click Return to My Assignments to return to the workbench with the Current filter active.

- If there are no schedule entries for a day, click the date link to access the Appointment Details page and create a new appointment.
- If there are schedule entries for a day, click the date link to access the Daily Schedule page.

Resource Schedule

The Resource Schedule chart displays your schedule for a four-week period beginning with the current date.



Resource Schedule chart on the My Assignments - Assignments page

On the Resource Schedule chart, you can:

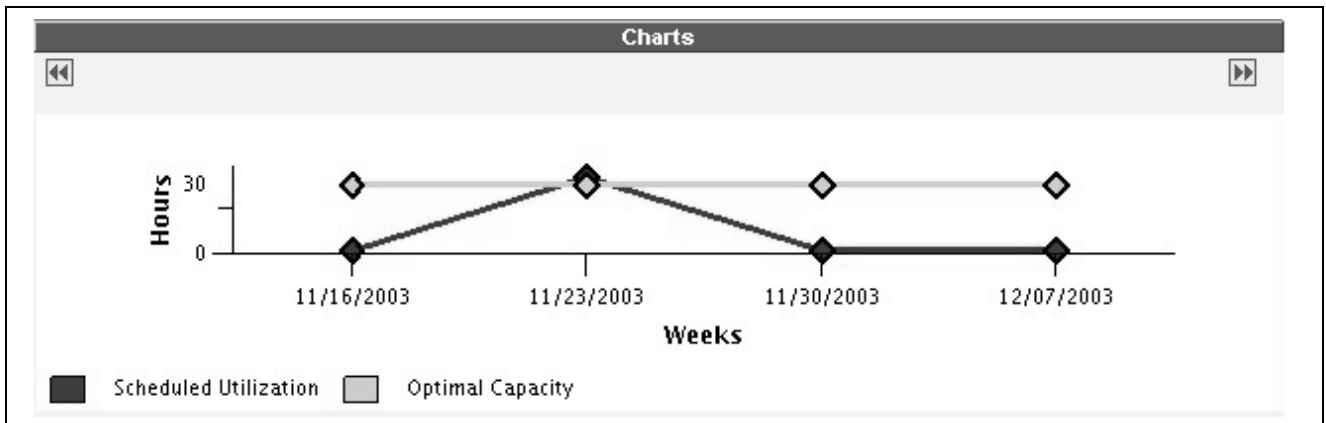
- View your unavailable time (gray bar), available time (white area), or overbooked time (red bar) for that period.
- View the assignment and customer description, or appointment description, when your cursor hovers over a task on the chart.

- Click the double-right or double-left arrows to scroll to the next or previous four-week period. If you also display the Scheduled Utilization chart, the double arrows scroll both charts so they display the same four-week period.

Task categories and corresponding chart colors are specified during implementation on the Installation Options - Resource Management page.

Scheduled Utilization

The Scheduled Utilization chart represents your scheduled utilization—the amount of time that you are scheduled to spend working on assignments—compared with the optimal capacity threshold that you specified on the My Assignments Options page.



Scheduled Utilization chart on the My Assignments - Assignments page

The task categories that the system takes into account are specified during implementation. You specify them on the Installation Options - Resource Management page.

On the Scheduled Utilization chart, you can:

- Click the double-right or double-left arrows to scroll to the next or previous four-week period.
- Compare your scheduled utilization (red line) against your optimal utilization ratio (yellow line).
- View the calculated utilization for a period by moving the mouse pointer across a scheduled utilization node on the chart.

Working with the Job Spy Feature

This section discusses how to:

- Search for assignments.
- Submit bids.
- Evaluate search results.

Pages Used to Work with the Job Spy Feature

Page Name	Object Name	Navigation	Usage
My Assignments - Job Spy	RS_MYJOBSPY	Resource Management, My Assignments, Job Spy	Find assignments based on selected search options and Resource Matching fit scores.
Job Scorecard for <Resource>	RS_JOB_SCRD_SEC	- Click a factor family fit score link on an assignment row.  Click View Job Scorecard in the Bids filter or Recommendations filter on the My Assignments - Assignments page.	View your fit scores against the specific requirements for this assignment.
Job Detail	RS_WRKR_JOBINFO	- Click Detail on an assignment row in the Bids or Recommendations filter on the My Assignments - Assignments page. - Click Detail on a resource request row on the My Assignments - Job Spy page.	Review information about the service order and resource request.
Bid Confirmation	RS_WRKR_BID_SUBMIT	Click Submit Bid on the My Assignments - Job Spy page.	Submit a bid for a specific service order.
Send E-Mail to <Manager>	RS_EMAILTEXT_SEC	 Click the E-Mail Supervisor button on a resource request row.	Send your manager comments about a specific resource request.

Searching for Assignments

The My Assignments - Job Spy page opens with an empty work space. You populate the page with open resource requests that are appropriate for you based on your search options and factor fit scores for each open request.

This section discusses how to:

- Specify search options on the My Assignments - Job Spy page.
- Find assignments based on search options and the matching of resource request to your qualifications, availability, and preferences.

Search Options

Search options control which resource requests the Resource Match engine evaluates when it searches for assignments for you. You can search all requests, or only the requests that are available to your organization. You can also assign relative priorities to each factor family fit score. The priorities determine which requests are returned and the order in which they appear in the work space.

The order of the resources requests in the grid is based on the overall fit score that consists of:

- How well you fit the specified qualifications, availability, and preferences.
- The organization's individual factor priorities that are specified on the Installation Options - Resource Management page.
- The relative priorities that you specify during the search session.

The overall fit score calculation begins with the objective fit scores for each match factor. The system then calculates factor family fit scores by applying installation-level relative factor importance settings. Then the system averages the family scores according to the relative factor family preferences that are selected during each instance of the Resource Match engine.

The resulting overall fit score does not appear on the page, but it controls which resource requests appear in the search results. The resource requests appear in descending order of overall fit score.

Access the My Assignments - Job Spy page.

My Assignments - Job Spy page

Owning Organization

Click to have the Resource Matching feature evaluate only open resource requests with a service order owning organization that includes your organization. For example, if the organizational unit is *Department*, Resource Matching evaluates any open resource request that specifies your department or a parent department as the owning organization on the service order.

All Requests

Click to have the Resource Matching feature evaluate all open resource requests as potential matches for you.

Availability, Preferences, and Qualifications

Expand the Search Settings collapsible group box and assign the relative priorities to each of the factor family fit scores for this search session.

Note. At least one of the factor families must have an importance value of at least *1 - Much less important* for the Resource Matching feature to return the appropriate search results.

Max Assignments (maximum assignments)

Enter the maximum number of requests to return.

Search

Click to initiate the Resource Match engine and calculate fit scores based on your search options.

You can adjust your search options and click Search to refresh the work space as many times as needed.

Resource Matching Results

The Resource Matching search results appear in the work space.

Search Results									
Qual.	Prefs.	Avail.	Dates	Role	Description	Location			
47%	44%	100%	06/01/2004 - 09/30/2004	Database Administrator	Previous Database Experience	Nashua, NH, USA	Detail	Submit Bid	
42%	25%	100%	04/01/2004 - 04/30/2004	Database Administrator	Database Skills	San Jose, CA, USA	Detail	Submit Bid	
42%	25%	100%	07/01/2004 - 11/30/2004	Database Administrator	Database Upgrade Experience	Portland, OR, USA	Detail	Submit Bid	
32%	25%	100%	04/05/2004 - 05/31/2004	Software Engineer	Experience in Cobol	Oakland, CA, USA	Detail	Submit Bid	
19%	25%	100%	06/30/2004 - 01/30/2005	HTML Developer	Portal Development	Washington, DC, USA	Detail	Submit Bid	

Search Results grid in the My Assignments - Job Spy page

Qual. (qualifications), **Prefs.** (preferences), and **Avail.** (availability)

Displays the factor family fit scores that indicate how closely the resource request matches your profile, interests, and schedule.

Click any fit score link to access the job scorecard and view details about requirements that are included in your fit score calculation for each factor family.

See [Chapter 20, “Assigning Resources,” Viewing the Job Scorecard, page 274.](#)

Dates

Displays the start and end date of the resource request. If multiple date ranges are specified on the request, the first start date and last end date appear.

Role

Displays the project role to be filled on the resource request.

Description

Displays the resource request description.

Location

Displays the assignment location that is specified on the resource request.

Detail

Click to access the Job Detail page and review available information about the resource request and service order.

Submit Bid

Click to access the Bid Confirmation page and submit a bid for this resource request.

Submitting Bids

Access the Bid Confirmation page.

Bid Confirmation

Are you sure you want to submit a bid for this assignment?

Business Unit:	US001
Service Order ID:	00000000006
Line Number:	1
Description:	Database Skills

Bid Confirmation page

You can submit a bid for any resource request in the My Assignments - Job Spy page work space.

Yes Verify the resource request information on the confirmation page and click Yes to enter the bid and return to the My Assignments - Job Spy page.

No Click to return to the My Assignments - Job Spy page without entering a bid.

Note. Once you place a bid, it cannot be canceled.

Evaluating Search Results

With the functionality and convenience of a one-stop workbench, the Job Spy provides easy access to the tools that you need to proactively search for work and make your interests known to managers and members of the staffing team. You can:

- Search for work throughout the organization or only in your department (or other organizational unit).
- Evaluate your qualifications, preferences, and availability using the job scorecard.

It contains the request dates and other requirements that determine your fit score calculation for the resource request.

- View all of the available information about the resource request on the Job Detail page.
- Express interest in a specific resource request by submitting a bid, or contact your manager about an assignment, resource request, bid, or recommendation

See Also

Chapter 24, “Managing Resource Utilization,” Evaluating Resource Requests, page 359

Managing a Worklist

This section discusses how to manage worklist items.

Page Used to Manage a Worklist

Page Name	Object Name	Navigation	Usage
Worklist	RS_MYWORKLIST	- Click You currently have <Number of Items> unworked items in your worklist on the My Assignments - Assignments page. - Click You currently have <Number of Items> unworked items in your worklist on the My Assignments - Job Spy page.	Review and process worklist items that are assigned to you.

Managing Worklist Items

A link to your worklist appears at the top of the My Assignments to alert you to any outstanding workflow items that require your attention. From the worklist, you can access item details, complete the required actions, and mark the items complete.

Use the My Assignments - Worklist page to view and manage worklist items such as:

- Notification of changes to your assignment status.
- Notification of changes to your assignment dates.
- Notification of requests for which you have been recommended.

A variety of worklist items may appear, including items that originate from sources other than PeopleSoft Resource Management. The actions that generate workflow actions or notification messages are specified during PeopleSoft Resource Management implementation.

Note. PeopleTools also provides a worklist that you can access from the folder navigation or from the Worklist link in the PeopleSoft universal navigation header. The worklist items are the same on any Worklist page, and you can view and process items from any worklist.

See Also

Chapter 25, “Processing Worklist Items,” page 367

CHAPTER 27

Creating and Modifying PeopleSoft Resource Management Reports

This chapter provides an overview of PeopleSoft Resource Management reports, and discusses how to establish parameters for reports that you generate from the Interactive Reports and Reports folders on the PeopleSoft homepage.

Note. The parameters that you establish using the pages discussed in this chapter apply only to reports that you generate from the Resource Management Interactive Reports and Reports folders. You can also generate interactive reports during business processes. For example, the Unassigned Resources, Chart Resource Schedules, and Scheduled Utilization interactive reports are available from the Staffing Workbench - Manage Utilization page. The parameters that you set for interactive reports generated during business processes are discussed in the business process chapters of this PeopleBook.

Understanding PeopleSoft Resource Management Reports

PeopleSoft Resource Management provides *reports* and *interactive reports* that are specifically designed to assist the service organization user to analyze and manage resource competencies, scheduling, and overall utilization. The distinction between the two terms is:

- Reports are batch processes that are managed through the PeopleSoft Process Scheduler, which enables you to schedule the processes, select different output formats, and distribute the reports to other users.
- Interactive reports enable a user to quickly spot historical or future trends in resource data in a list or chart format.

PeopleSoft Resource Management interactive reports provide information that is immediately visible on the application page—without the need for sending a process request to the PeopleSoft Process Scheduler.

Establishing Report Parameters

This section discusses how to establish parameters for these reports that you generate from the Resource Management Interactive Reports and Reports folders:

- Scheduled Utilization
- Unassigned Resources
- Assignments Ending
- Most Requested Competencies & Accomplishments

- Chart Resource Schedules
- Average Staffing Time
- Optimal Solution Set (Resource Optimization report)
- Assignments Listing
- Service Order Listing

Pages Used to Establish Report Parameters

Page Name	Object Name	Navigation	Usage
Scheduled Utilization	RS_2020TUTR_PAR	Resource Management, Interactive Reports, Scheduled Utilization, Scheduled Utilization Click Go To Report Parameters. Click Advanced Parameters or Basic Parameters.	Establish parameters for the Scheduled Utilization interactive report that you generate from the Resource Management Interactive Reports folder.
Unassigned Resources	RS_2030BENCH_PAR	Resource Management, Interactive Reports, Unassigned Resources, Unassigned Resources Click Go To Report Parameters. Click Advanced Parameters or Basic Parameters.	Establish parameters for the Unassigned Resources interactive report that you generate from the Resource Management Interactive Reports folder.
Assignments Ending	RS_2040WRKRCOM_PAR	Resource Management, Interactive Reports, Assignments Ending, Assignments Ending Click Go To Report Parameters. Click Advanced Parameters or Basic Parameters.	Establish parameters for the Assignments Ending interactive report that you generate from the Resource Management Interactive Reports folder.
Most Requested Competencies & Accomplishments	RS_2100COMP_RPT	Resource Management, Interactive Reports, Most Requested Competencies, Most Requested Competencies & Accomplishments	Establish parameters for the Most Requested Competencies & Accomplishments interactive report that you generate from the Resource Management Interactive Reports folder.

Page Name	Object Name	Navigation	Usage
Chart Resource Schedules	RS_2045WRKRSCH_PAR	Resource Management, Interactive Reports, Chart Resource Schedules, Chart Resource Schedules Click Go To Report Parameters. Click Advanced Parameters or Basic Parameters.	Establish parameters for the Chart Resource Schedules interactive report that you generate from the Resource Management Interactive Reports folder.
Average Staffing Time	RS_2090AVST_PAR	Resource Management, Interactive Reports, Average Staffing Time, Average Staffing Time Click Go To Report Parameters.	Establish parameters for the Average Staffing Time interactive report that you generate from the Resource Management Interactive Reports folder.
Opt (optimal) Solution Set	RS_OPT_ASSIGN_RPT	Resource Management, Reports, Resource Optimization, Opt Solution Set	Review an existing optimal solution set that was generated by the Resource Optimization process.
Assignments Listing Report	RS_2015ASSGNLS_RPT	Resource Management, Reports, Assignments Listing, Assignments Listing Click Basic Parameters or Advanced Parameters.	Establish parameters for the Assignments Listing SQL report that you generate from the Resource Management Reports folder.
Service Order Listing	RS_2000SOLIST_PAR	Resource Management, Reports, Service Order Listing, Service Order Listing Report	Establish parameters for the Service Order Listing SQL report that you generate from the Resource Management Reports folder.

Setting Scheduled Utilization Parameters

Access the Scheduled Utilization parameter page.

Scheduled Utilization

Sched_Utilization

Select an Organization

Left | Right

- CONSULTING CORP - Consulting Corp
 - + HUMAN RESOURCES - Human Resources
 - + INFORMATION SERVICES - Information Services
 - + PUBLIC RELATIONS - Public Relations
 - + AUDITING - Auditing
 - + ADMINISTRATION - Administration
 - + BUSINESS SERVICES - Business Services
 - + SALES AND SERVICES - Sales and Services
 - + SERVICES - INDUSTRY - Services - Industry
 - + NO-DEPTID - No Department

[Basic Parameters](#)

*Business Unit:

JPN01

*Tree Name:

CONSULTING

*Selected Organization:

SALES AND SERVICES

Description:

Optimal Utilization Ratio:

85.000

Enter a whole number.

Chart Period:

Weeks

*Start Date:

01/01/2004



*End Date:

12/31/2004



Scheduled Utilization parameter page (1 of 2)

Select task categories to be considered as utilized time.

Selected Tasks			Customize	Find		First	1-5 of 5	Last
	Task Category							
1	Billable External		+	-				
2	Billable Internal		+	-				
3	Nonbillable External		+	-				
4	Education-College/Univ		+	-				
5	Corporate Training		+	-				

[Go To Utilization Chart](#)

Scheduled Utilization parameter page (2 of 2)

The Scheduled Utilization interactive report compares scheduled utilization with optimal capacity for an organization unit, period of time, and utilization percentage that you define.

Scheduled utilization evaluates resource schedules for the task categories that you want to be treated as utilized time. Optimal capacity evaluates resource standard hours from the Standard Hours field (STD_HOURS) on the Job record.

Select an Organization

Displays the Organizational Unit tree that you select in the Tree Name field. Select an organizational unit to evaluate. Your selection appears in the Selected Organization field.

Expand the nodes as required to select a node or detail value from the tree. The report evaluates resources from the selected value for all HR business units that share the Organizational Unit tree.

Business Unit

Enter the human resource (HR) business unit that is associated with the Organizational Unit tree from which you will select organizational units to include in the interactive report. Your selection determines which tree appears in the Select an Organization group box.

This field appears only in the Advanced Parameters view. The Basic Parameters view uses the HR business unit of the employee that is associated with the user who is logged into the system.

If you change the Business Unit field value, click Look Up Tree Name to select the new Organizational Unit tree.

Tree Name

Enter the Organizational Unit tree name that is associated with the HR business unit. The Organizational Unit tree appears in the Select an Organization group box.

Selected Organization

The node name appears that you selected from the tree. You can enter a different node name.

Description

Displays the detail value description if you selected a detail value from the tree. If you did not select a detail value, the field is blank.

Optimal Utilization Ratio

Enter the percentage of a resource's total capacity that the resource must be scheduled on utilized tasks for the resource to be treated as optimally utilized on this interactive report. Enter a whole number, such as 85 for 85 percent.

Chart Period

Enter the periods for the report to segment the time between the start and end date. Available values are *Months*, *Quarters*, *Semiannual*, *Weeks*, or *Years*.

Start Date and End Date

Enter the start and end dates during which the system compares scheduled utilization with optimal capacity.

Task Category

Enter the task categories to include in the definition of utilized time. Add rows or delete as required.

See Also

[Chapter 24, "Managing Resource Utilization," Reviewing Utilization Charts, page 360](#)

Setting Unassigned Resources Parameters

Access the Unassigned Resources parameter page.

Unassigned Resources

JPN01

Select an Organization

Left | Right

+ CONSULTING CORP - Consulting Corp

[Basic Parameters](#)

***Business Unit:** JPN01

***Tree Name:** CONSULTING

***Selected Organization:** CONSULTING CORP

Description:

***Start Date:** 01/01/2004

***End Date:** 12/31/2004

Minimum Percentage: 85.00 Minimum fully Utilized Percent. Please enter as a whole number, for example, the number 85 = 85%.

Select task categories to be considered as utilized time.

Selected Tasks			Customize	Find	First	1-7 of 7	Last
	Task Category						
1	Billable External		+	-			
2	Billable Internal		+	-			
3	Education-College/Univ		+	-			
4	Meeting		+	-			
5	Nonbillable External		+	-			
6	Nonbillable Internal		+	-			
7	Corporate Training		+	-			

[Go To Unassigned Resources](#)

Unassigned Resources parameter page

The Unassigned Resources interactive report lists resources who do not meet the threshold for determining that a worker is fully assigned. The chart displays the percentages of resources who are assigned and unassigned. Click the assigned or unassigned portion of a bar to view a list of the assigned or unassigned resources, and the bill rate, percentage assigned, and assignment status for each resource. From the list you can access resource profiles, schedules, and assignments. Click the Find Assignment icon on a resource row to enter the Staffing Workbench - Manage Utilization page with the resource selected.

On the Unassigned Resources parameter page, you define the organization, period of time, and minimum percentage that determines when a worker is treated as assigned. You also select the task categories that the system uses to define utilized time.

The report evaluates resources from the selected value for all HR business units that share the Organizational Unit tree.

Minimum Percentage

Enter the minimum percentage of time that resources must be scheduled on utilized tasks for the resources to be treated as fully assigned on the Unassigned Resources interactive report. Enter a whole number, such as 85 for 85 percent.

See Also

Chapter 24, “Managing Resource Utilization,” Reviewing Utilization Charts, page 360

Setting Assignments Ending Parameters

Access the Assignments Ending parameter page.

Assignments Ending

JPN01

Select an Organization

Left | Right

+ CONSULTING CORP - Consulting Corp

[Basic Parameters](#)

***Business Unit:**

***Tree Name:**

***Selected Organization:**

Department:

To get a listing of all Resources which have assignments ending within date range, enter a start and end date to create the date range. To get a complete list of all Resources for the selected organization do not enter a date range on this page.

Start Date:

End Date:

[Go To Resource List](#)

Assignments Ending parameter page

Use the Assignments Ending interactive report to review a summary list of resources with assignments ending during the date range and for the organizational unit that you specify on this page. The list provides employee names, employee IDs, and the end date of their last assignment. The list of resources can be downloaded to an Excel or other spreadsheet program.

Click a resource name to review the resource’s specialties, if the resource profile contains specialties, and to review a chart of the resource’s schedule for the next four weeks. Task categories and corresponding chart colors that appear on the Resource Schedules chart are specified during implementation on the Installation Options - Resource Management page. Click Next Period or Previous Period to review the next or previous four weeks on the schedule.

Setting Most Requested Competencies & Accomplishments Parameters

Access the Most Requested Competencies & Accomplishments parameter page.

Most Requested Competencies & Accomplishments

Most_Requested

Number of Results:

***Start Date:**

Service Order Business Unit:

Most Requested Competencies & Accomplishments parameter page

The Most Requested Competencies & Accomplishments pie charts display the most frequently requested competencies and accomplishments as determined by the frequency of occurrence on resource requests. You select the maximum number of results to appear on the report, reporting period, and service order business unit to evaluate. A competency or accomplishment pie chart appears only if a competency or accomplishment was requested during the specified period time for the business unit.

Move the mouse pointer across a pie chart section to view alternate text about the number of requests for a competency or accomplishment.

Click a pie chart to access a list of the most requested competencies and accomplishments in separate grids in descending order based on the number of requests.

You must enter a value for the number of results, start date, and service business unit.

Setting Chart Resource Schedules Parameters

Access the Chart Resource Schedules parameter page.

Chart Resource Schedules

JPN01

Select an Organization

Left | Right

 CONSULTING CORP - Consulting Corp

[Basic Parameters](#)

***Business Unit:** JPN01 

***Tree Name:** CONSULTING 

***Selected Organization:** SERVICES - INDUSTRY 

Department:

***Start Date:** 01/01/2004 

Chart Period: Weeks 

Maximum Number of Resources Displayed: 5

Select the task categories that you would like to appear in the chart.

Selected Tasks		Customize Find 	First 	1-7 of 7	Last 
	Task Category	*Task Chart Color			
1	Billable External	Black			
2	Billable Internal	Blue			
3	Education-College/Univ	Purple			
4	Meeting	Orange			
5	Nonbillable External	Cyan			
6	Nonbillable Internal	Red-Orange			
7	Corporate Training	Yell-Green			

[Go To Resource Schedule](#)

Chart Resource Schedules parameter page

The Chart Resource Schedules interactive report displays a chart of resource schedules to help you quickly identify scheduled and available time. Click First Item, Previous Item, Next Item, or Last Item to scroll through the list of resources. Click Next Period or Previous Period to view schedules from other time periods. Move the mouse pointer across an assignment task to view alternate text about the assignment description and customer name. Move the mouse pointer across an appointment task to view alternate text about the appointment description.

On the Chart Resource Schedules parameter page, you select the organization, start date, period of time, number of resources, and tasks that appear in the chart.

Chart Period

Enter the time intervals to appear on the report. The default value is *Weeks*.

Maximum Number of Resources Displayed	Enter the maximum number of resources to group together in your chart. A bar appears in the report for each resource in groups the size that you indicate in this field. The default value is 5.
Task Category	Enter the task categories to appear on the chart.
Task Chart Color	Enter a color to designate each task category that will appear on the chart.

See Also

[Chapter 24, “Managing Resource Utilization,” Reviewing Utilization Charts, page 360](#)

Setting Average Staffing Time Parameters

Access the Average Staffing Time parameter page.

Average Staffing Time

JPN01

***Organization Unit:** JPN01

***Tree Name:** CONSULTING

Select an Organization

Left | Right

CONSULTING CORP - Consulting Corp

***Selected Organization:** BUSINESS SERVICES

Description: Business Services

Service Order Business Unit: US004

Chart Period: Weeks

***Start Date:** 01/01/2004

***End Date:** 12/31/2004

Assigned To: Jones, Catherine

Detailed Report By

☒ Priority ☐ Coordinator ☐ Owning Organization

[Go To Average Staffing Time Chart](#)

Average Staffing Time parameter page

Staffing time is the number of days from the date the service order was submitted for fulfillment (placed in a status of *New*) to the date the order was fulfilled (placed in a status of *Closed*). If a service order has more than one occurrence in a status of *New*, only the first occurrence is included in the calculation.

On the Average Staffing Time chart you can view the total number of service orders, average staffing time, and average number of requests. You can narrow or broaden the scope of the analysis by specifying parameters, and drill into details grouped by priority, staffing coordinator, or owning organization.

Assigned To	Specify a person responsible for staffing service orders to include in this interactive report. Leave the field blank to evaluate all persons responsible for staffing orders within the parameters that you specify on this page.
Priority, Coordinator, or Owning Organization	Select to view the total number of service orders, average staffing time, and average number of requests broken out by Priority, (Staffing) Coordinator, or Owning Organization.

Setting Resource Optimization Report Parameters

The parameters that you specify for use in Resource Optimization are discussed in the business process chapter in this PeopleBook.

See [Chapter 17, “Enabling Resource Optimization,” Defining, Registering, and Creating Solution Sets, page 204](#).

Setting Assignments Listing Report Parameters

Access the Assignments Listing parameter page.

Assignments Listing

Run Control ID: JPN01 [Report Manager](#) [Process Monitor](#) Run
Language: English ▼

Select an Organization
 Left | Right

+ CONSULTING CORP - Consulting Corp

***Business Unit:** US001 🔍

***Tree Name:** CONSULTING 🔍

***Selected Organization:** MANUFACTURING 🔍

Department: Manufacturing Support

Service Order Business Unit: JPN01 🔍

A Project or Service Order Business Unit is required to select a Project or a Customer.

Project: MOBILE_JPN 🔍

Customer: JPN05 🔍

Customer Name: Tokyo Wholesale Suppliers

***Start Date:** 06/01/2003 📅

***End Date:** 06/01/2004 📅

[Basic Parameters](#)

Assignments Listing parameter page

Use the Assignments Listing SQL report to review a list of all resources currently on assignment.

On the Assignments Listing parameter page, you define the organization and period of time, and optionally define other information about the service order. The report is sorted by employee ID, customer name, and project ID.

Service Order Business Unit	Enter the project business unit that determines the list of service orders to evaluate. Leave the field blank to include all service orders. You must enter a project business unit to select a project or customer to evaluate.
Project	Enter the project to evaluate in this report. Leave the field blank to include all projects.
Customer	Enter the customer to evaluate in this interactive report. Leave the field blank to include all customers.
Customer Name	Displays the customer name associated with the customer ID.

Setting Service Order Listing Report Parameters

Access the Service Order Listing Report parameter page.

Service Order Listing Report

Run Control ID: Service_Order_Listing
 [Report Manager](#)
[Process Monitor](#)

Language: English

***Service Order Business Unit:** FRA01

A Service Order Business Unit is required to select a Project.

Customer:

Customer Name:

Project:

Assigned To: Saint-Amand,Gertie

Entered by:

***Start Date:** 01/01/2003

***End Date:** 12/31/2003

☒ **Show Resource Request Detail**

Service Order Listing Report parameter page (1 of 2)

Select Service Order statuses to include in the report.

Customize Find First 1-3 of 3 Last		
	Service Order Status	
1	In Process	+ -
2	New	+ -
3	Open	+ -

Select Service Order priorities to include in the report.

Customize Find First 1-2 of 2 Last		
	Priority Code	
1	HIGH	+ -
2	MEDIUM	+ -

Service Order Listing Report parameter page (2 of 2)

The Service Order Listing SQL report is sorted by status or priority. You can review to whom service orders have been assigned for fulfillment and the state of your customer's projects. The Service Order Listing is useful for tracking the progress of service orders as they move through your organization.

You define the business unit, status, priority, and period of time to evaluate. You can optionally define additional details to focus the report on specific customers, projects, persons responsible for staffing service orders, or persons who created service orders.

Assigned To	Enter the name of the person responsible for staffing the service orders that you want to include in the report.
Entered by	Enter the name of the person who entered the service orders that you want to include in the report.
Show Resource Request Detail	Select if you want the report to include resource request details, such as the quantity of resources requested, request start date, end date, days of work, request status, and more.
Service Order Status	Enter the service order statuses to include on the report. Add rows as necessary.
Priority Code	Enter the priority codes to include on the report. Add rows as necessary.

APPENDIX A

Delivered Workflows for PeopleSoft Resource Management

This appendix discusses delivered workflows for PeopleSoft Resource Management.

See Also

Chapter 5, “Defining PeopleSoft Resource Management Business Units,” Specifying PeopleSoft Resource Management Business Unit Options, page 52

Chapter 25, “Processing Worklist Items,” page 367

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up PeopleSoft Resource Management Installation Options

PeopleTools PeopleBook: PeopleSoft Workflow

PeopleTools PeopleBook: Using PeopleSoft Applications

Delivered Workflows for PeopleSoft Resource Management

This section discusses PeopleSoft Resource Management workflows. The workflows are listed alphabetically by workflow name.

Appointment Schedule Notification

This section discusses Appointment Schedule Notification workflow.

Description

Event Description	The following event triggers Appointment Schedule Notification workflow: Save a new or modified appointment task on the Appointment Details page in the Appointment Schedule component (RS_SCHED_APPT).
Action Description	If a resource adds or modifies an appointment task, the resource manager, as defined on the Job record (JOB), appears as the addressee on the Notification Message page. Enter comments about the appointment, and click OK to send the email to the resource manager. If a manager, or anyone with access to the Monthly Schedule page, adds or modifies a resource's appointment task, the resource appears as the addressee on the Notification Message page. Enter comments about the appointment, and click OK to send the email to the resource.
Notification Method	Email

Note. Appointment Schedule Notification workflow options are activated on the Installation Options - Resource Management page.

Workflow Objects

Business Process	Resource Appointment Schedule (RS_SCHED_TASK)
Activity	Appointment Schedule Notification (RS_SCHED_NOTIFY)

See Also

[Chapter 19, "Maintaining Resource Schedules," page 239](#)

Assignment Approval

This section discusses Assignment Approval workflow.

Description

Event Description	The following events trigger Assignment Approval workflow: Save a new assignment with a status of <i>Assigned</i>. Modify an assignment date for an assignment that is in an <i>Assigned</i> status. Modify the assignment status of an existing assignment from any status to <i>Assigned</i>. Reject an assignment. Modify an assignment status to any status that is specified on the Resource Management Options page for triggering email notifications to the resource, resource manager, and project manager.
Action Description	Saving a new assignment with a status of <i>Assigned</i> triggers a worklist item to the resource manager, as defined on the Job record, to approve the assignment. Modifying a date for an assignment in an <i>Assigned</i> status triggers a worklist item to the resource manager to approve the assignment date change. Modifying the status of an assignment from any status to <i>Assigned</i> triggers a worklist item to the resource manager to approve the assignment status change. Modifying an assignment date or status triggers an email notification to the resource manager, the resource, and the project manager. Rejecting an assignment triggers an email notification to the resource and the project manager.
Notification Method	New assignments, date changes, or status changes that require approval are sent to the worklist. Notifications to the resource manager, resource, and project manager of assignment date and status changes are sent through email.

Note. A worklist item or email notification is not sent to the user who changes the assignment. For example, a worklist item is not sent to the resource manager to approve a new assignment if the resource manager is the person who submitted the assignment.

Assignment Approval workflow options are activated on the Resource Management Options page.

Important! For all resources, you must enter a supervisor on the Update Employee Data - Employee Job page before you can use workflow to send assignments for approval or notification to the resource manager.

Workflow Objects

Business Process	Assignment Approval (RS_ASSGN_APPROVAL)
Activity	Assignment Approval (RS_ASSGN_APPROVAL)

See Also

[Chapter 20, “Assigning Resources,” page 253](#)

[Chapter 23, “Fulfilling Service Orders,” page 321](#)

[Chapter 24, “Managing Resource Utilization,” page 345](#)

[Chapter 26, “Using the Resource Self-Service Feature,” page 373](#)

Competency Change Notification

This section discusses Competency Change Notification workflow.

Description

Event Description	The following event triggers Competency Change Notification workflow: Modify a competency or accomplishment on a resource profile.
Action Description	The system sends an email notification to the resource manager (as defined in the Job record) that competencies or accomplishments are updated on the resource profile.
Notification Method	Email

Note. This workflow applies only if you use the PeopleSoft FSCM (Financial Management Solutions, Enterprise Service Organization, and Supply Chain Management) database as the employee source database for the resource.

Competency Change Notification workflow is activated on the Installation Options
- Resource Management page.

Workflow Objects

Business Process	Resource Competencies (UPDATE_COMP_EMAIL)
Activity	Competency Change Notification (EMAIL_SUPERVISOR)

See Also

[Chapter 18, “Maintaining Resource Profiles,” page 211](#)

Contract Administrator Notification

This section discusses Contract Administrator Notification workflow.

Description

Event Description	The following event triggers Contract Administrator Notification workflow: Click the Notify Contracts Administrator link on the Notify Contract Administrator page to send an email to the contract administrator.
Action Description	Contract administrators that are defined as support team managers in PeopleSoft Contracts appear on the Notify Contract Administrator page for you to select a contract administrator and enter comments about an assignment. Save the assignment to send the email.
Notification Method	Email

Note. This workflow is automatically activated.

Workflow Objects

Business Process	Contract Administrator (RS_NOTIFY_CNTRCT_ADMIN)
Activity	Contract Administrator Notification (RS_NOTIFY_CNTRCT_ADMIN)

See Also

[Chapter 20, “Assigning Resources,” page 253](#)

Recommendation Notification

This section discusses Recommendation Notification workflow.

Description

Event Description	The following event triggers Recommendation Notification workflow: Recommend a resource for a resource request on the Service Order - Recommend Resources page and save the service order. Select an action of <i>Recommend</i> for a resource-and-resource request combination on the Staffing Workbench - Manage Utilization page and save the workbench.
Action Description	The system sends a worklist item to the resource as a notification that the resource is recommended for a resource request.
Notification Method	Worklist

Note. This workflow is automatically activated.

Workflow Objects

Business Process	My Assignments (RS_RESOURCE_DSHBRD)
Activity	Recommendation Notification (RS_MYRECS_CHANGE)

See Also

[Chapter 22, “Requesting Resources Using Service Orders,” page 297](#)

Resource Assignment Notification

This section discusses Resource Assignment Notification workflow.

Description

Event Description	The following events trigger Resource Assignment Notification workflow: Create a new assignment with a status of <i>Assigned</i>. Modify a date for an assignment in an <i>Assigned</i> status. Modify the status of an existing assignment from any status to <i>Assigned</i>.
Action Description	Creating a new assignment, modifying an assignment status, or modifying an assignment date triggers a worklist item to the resource.
Notification Method	Worklist

Note. This workflow is automatically activated.

Workflow Objects

Business Process	My Assignments (RS_RESOURCE_DSHBRD)
Activity	Resource Assignment Notification (RS_MYASSGN_CHANGE)

See Also

[Chapter 20, “Assigning Resources,” page 253](#)

[Chapter 23, “Fulfilling Service Orders,” page 321](#)

[Chapter 24, “Managing Resource Utilization,” page 345](#)

[Chapter 26, “Using the Resource Self-Service Feature,” page 373](#)

Service Order Notification

This section discusses Service Order Notification workflow.

Description

Event Description	The following events trigger Service Order Notification workflow: Submit a new service order. Modify the person responsible for staffing a service order. Modify the status of a service order. Modify the status of a resource request. Click the E-Mail Partner link on the Order Summary page to send an email to a partner or any email addressee.
Action Description	Submitting a new service order triggers a worklist item to the person responsible for staffing the service order. Changing the responsible for staffing person on a service order triggers a worklist item to the new user who is responsible for staffing the order. Modifying the status of a service order triggers an email notification to the user who is responsible for staffing the service order, and to each of the users who are listed as interested parties on the service order. Modifying the status of a resource request triggers an email notification to resources who were recommended for the resource request, or who submitted a bid for the resource request. Clicking the E-Mail Partner link on the Order Summary page accesses the E-Mail Partner page for you to enter an email address. Click OK to send the email message containing information about the service order and all of the resource requests included in the order.
Notification Method	New service orders ready for staffing, or existing service orders with a change in the person responsible for staffing the order, are sent to the worklist. Notifications of a service order status change to the user who is responsible for staffing the service order, and to each of the users who are listed as interested parties on the service order, are sent through email. Notifications of a resource request status change to resources who received a recommendation, or bid on the request, are sent through email. Messages to a partner or other email addressee are sent through email.

Note. Service order workflow options are activated on the Resource Management Options page. Workflow to send an email message to a partner or other email addressee is automatically activated.

Workflow Objects

Business Process	Service Order (RS_SERVICE_ORDER)
Activity	Service Order Notification (RS_SO_ENTER)

See Also

[Chapter 22, “Requesting Resources Using Service Orders,” page 297](#)

Supervisor Notification

This section discusses Supervisor Notification workflow.

Description

Event Description	The following event triggers Supervisor Notification workflow: Click the E-Mail Supervisor icon button in the My Assignments component (RS_MYASSIGNMENTS) to send an email to your supervisor.
Action Description	The user's manager, as defined on the Job record, appears as the addressee on the Send E-Mail to <Supervisor> page. Enter comments about an assignment or resource request, and click OK to send the email.
Notification Method	Email

Note. This workflow is automatically activated.

Workflow Objects

Business Process	My Assignments (RS_RESOURCE_DSHBRD)
Activity	Supervisor Notification (RS_MYASSGN_EMAIL)

See Also

[Chapter 26, "Using the Resource Self-Service Feature," page 373](#)

APPENDIX B

PeopleSoft Resource Management Reports

This appendix provides an overview of PeopleSoft Resource Management reports and interactive reports.

Note. For samples of these reports and interactive reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

PeopleSoft Resource Management Reports: A to Z

This table lists the PeopleSoft Resource Management reports and interactive reports, sorted alphanumerically by report ID. The reports are Crystal reports, and are designated with a PeopleSoft Process Scheduler run control page ID. The remaining items in the list are interactive reports that you can generate during a business process or from the Interactive Reports folder. Interactive reports are not scheduled through the PeopleSoft Process Scheduler.

Report ID and Report Name	Description	Navigation	Run Control Page
RS_2020TUTR_RPT Scheduled Utilization	Compare scheduled utilization with optimal capacity for a specified organization unit and period of time. This interactive report supports the business process of managing resources. <u>See Chapter 24, “Managing Resource Utilization,” Reviewing Utilization Charts, page 360.</u>	Resource Management, Interactive Reports, Scheduled Utilization, Scheduled Utilization Click Generate Report.	not applicable
RS_2020TUTR_STAT Scheduled Utilization - Employee Statistics	View the resources in the Scheduled Utilization chart. This interactive report supports the business process of managing resources.	Click Go To Resource List in the Scheduled Utilization chart page.	not applicable

Report ID and Report Name	Description	Navigation	Run Control Page
RS_2030BENCH_RPT Unassigned Resources	Analyze resources who do not meet the threshold that you define for determining that a worker is assigned. This interactive report provides a chart and lists the unassigned and assigned resources in the organizational units represented by the tree node or detail value that you specify at run time. This interactive report supports the business process of assigning resources to projects. <u>See Chapter 24, "Managing Resource Utilization," Reviewing Utilization Charts, page 360.</u>	Resource Management, Interactive Reports, Unassigned Resources, Unassigned Resources Click Generate Report.	not applicable
RS_2040WRKRCOM_DTL Assignments Ending (detail)	View information about a specific resource's specialties and schedule. This interactive report supports the business process of assigning resources to projects.	Select a resource name link on the Assignments Ending (summary) page.	not applicable
RS_2040WRKRCOM_RPT Assignments Ending (summary)	Analyze resources who might be available on a certain date with certain skills. View a list of resources who have assignments ending within a specified date range. This interactive report supports the business process of assigning resources to projects. <u>See Chapter 24, "Managing Resource Utilization," Viewing Resources, page 351.</u>	Resource Management, Interactive Reports, Assignments Ending, Assignments Ending Click Generate Report.	not applicable

Report ID and Report Name	Description	Navigation	Run Control Page
RS_2045WRKRSCH_RPT Chart Resource Schedules	Displays a chart of resource schedules so you can quickly identify scheduled and available time. This interactive report supports the business process of assigning resources to projects. See Chapter 24, “Managing Resource Utilization,” Reviewing Utilization Charts, page 360.	Resource Management, Interactive Reports, Chart Resource Schedules, Chart Resource Schedules Click Generate Report.	not applicable
RS_2090AVST_RPT Average Staffing Time (chart)	View trends in staffing time by charting the average amount of time it takes to fulfill service orders in a specified period.	Resource Management, Interactive Reports, Average Staffing Time, Average Staffing Time Click Generate Report.	not applicable
RS_2090AVST_STATP Average Staffing Time (detail)	View the breakdown of the average staffing time by service order priority, staffing coordinator, or owning organization.	Click Go To Average Staffing Time per <Priority, Coordinator, or Owning Organization> on the Average Staffing Time chart page.	not applicable
RS_2100COMP_DTL Most Requested Competencies & Accomplishments (detail)	Identifies the most requested competencies and accomplishments to assist you in the recruitment of resources who best meet your historical or future needs. View lists containing the most requested competencies and accomplishments in descending order by number of requests. This interactive report supports the business process of managing resources.	Click anywhere in the Most Requested Competencies chart or Most Requested Accomplishments chart.	not applicable
RS_2100COMP_RPT Most Requested Competencies & Accomplishments (chart)	View charts containing the most requested competencies and accomplishments. Popularity is determined by the number of times that a particular competency or accomplishment appears on resource requests for a given business unit in a given time period. You can use this information to assist you in the recruitment of resources who best meet your historical needs. This interactive report supports the business process of managing resources.	Resource Management, Interactive Reports, Most Requested Competencies, Most Requested Competencies & Accomplishments Click Generate Report.	not applicable

Report ID and Report Name	Description	Navigation	Run Control Page
RS_OPT_ASSIGN_RPT Opt Solution Set (optimal solution set)	View the most recent optimal solution set for a specified optimization set ID. This interactive report supports the business process of assigning resources to projects. <u>See Chapter 17, “Enabling Resource Optimization,” Defining, Registering, and Creating Solution Sets, page 204.</u>	Resource Management, Reports, Resource Optimization, Opt Solution Set	RUN_RS_OPTIMIZE
SRS2000 Service Order Listing	View a list of service orders by status and priority. This report supports the business process of assigning resources to projects.	Resource Management, Reports, Service Order Listing, Service Order Listing Click Run to run the report by using PeopleSoft Process Scheduler.	RUN_SRS2000-
SRS2015 Assignments Listing Report	View a list of resources currently on assignment. This report supports the business process of assigning resources to projects.	Resource Management, Reports, Assignment Listing, Assignment Listing Report Click Run to run the report using the PeopleSoft Process Scheduler.	RUN_SRS2015-

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
KPI	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment. An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

	on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i>. See <i>record input VAT flag</i>.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.

run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

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CHAPTER 1

PeopleSoft Resource Management Reports

This appendix provides an overview of PeopleSoft Resource Management reports and interactive reports.

Note. For samples of these reports and interactive reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

PeopleSoft Resource Management Reports: A to Z

This table lists the PeopleSoft Resource Management reports and interactive reports, sorted alphanumerically by report ID. The reports are Crystal reports, and are designated with a PeopleSoft Process Scheduler run control page ID. The remaining items in the list are interactive reports that you can generate during a business process or from the Interactive Reports folder. Interactive reports are not scheduled through the PeopleSoft Process Scheduler.

Report ID and Report Name	Description	Navigation	Run Control Page
RS_2020TUTR_RPT Scheduled Utilization	Compare scheduled utilization with optimal capacity for a specified organization unit and period of time. This interactive report supports the business process of managing resources.	Resource Management, Interactive Reports, Scheduled Utilization, Scheduled Utilization Click Generate Report.	not applicable
RS_2020TUTR_STAT Scheduled Utilization - Employee Statistics	View the resources in the Scheduled Utilization chart. This interactive report supports the business process of managing resources.	Click Go To Resource List in the Scheduled Utilization chart page.	not applicable

Report ID and Report Name	Description	Navigation	Run Control Page
RS_2030BENCH_RPT Unassigned Resources	Analyze resources who do not meet the threshold that you define for determining that a worker is assigned. This interactive report provides a chart and lists the unassigned and assigned resources in the organizational units represented by the tree node or detail value that you specify at run time. This interactive report supports the business process of assigning resources to projects.	Resource Management, Interactive Reports, Unassigned Resources, Unassigned Resources Click Generate Report.	not applicable
RS_2040WRKRCOM_DTL Assignments Ending (detail)	View information about a specific resource's specialties and schedule. This interactive report supports the business process of assigning resources to projects.	Select a resource name link on the Assignments Ending (summary) page.	not applicable
RS_2040WRKRCOM_RPT Assignments Ending (summary)	Analyze resources who might be available on a certain date with certain skills. View a list of resources who have assignments ending within a specified date range. This interactive report supports the business process of assigning resources to projects.	Resource Management, Interactive Reports, Assignments Ending, Assignments Ending Click Generate Report.	not applicable
RS_2045WRKRSCH_RPT Chart Resource Schedules	Displays a chart of resource schedules so you can quickly identify scheduled and available time. This interactive report supports the business process of assigning resources to projects.	Resource Management, Interactive Reports, Chart Resource Schedules, Chart Resource Schedules Click Generate Report.	not applicable
RS_2090AVST_RPT Average Staffing Time (chart)	View trends in staffing time by charting the average amount of time it takes to fulfill service orders in a specified period.	Resource Management, Interactive Reports, Average Staffing Time, Average Staffing Time Click Generate Report.	not applicable
RS_2090AVST_STATP Average Staffing Time (detail)	View the breakdown of the average staffing time by service order priority, staffing coordinator, or owning organization.	Click Go To Average Staffing Time per <Priority, Coordinator, or Owning Organization> on the Average Staffing Time chart page.	not applicable

Report ID and Report Name	Description	Navigation	Run Control Page
RS_2100COMP_DTL Most Requested Competencies & Accomplishments (detail)	Identifies the most requested competencies and accomplishments to assist you in the recruitment of resources who best meet your historical or future needs. View lists containing the most requested competencies and accomplishments in descending order by number of requests. This interactive report supports the business process of managing resources.	Click anywhere in the Most Requested Competencies chart or Most Requested Accomplishments chart.	not applicable
RS_2100COMP_RPT Most Requested Competencies & Accomplishments (chart)	View charts containing the most requested competencies and accomplishments. Popularity is determined by the number of times that a particular competency or accomplishment appears on resource requests for a given business unit in a given time period. You can use this information to assist you in the recruitment of resources who best meet your historical needs. This interactive report supports the business process of managing resources.	Resource Management, Interactive Reports, Most Requested Competencies, Most Requested Competencies & Accomplishments Click Generate Report.	not applicable
RS_OPT_ASSIGN_RPT Opt Solution Set (optimal solution set)	View the most recent optimal solution set for a specified optimization set ID. This interactive report supports the business process of assigning resources to projects.	Resource Management, Reports, Resource Optimization, Opt Solution Set	RUN_RS_OPTIMIZE
SRS2000 Service Order Listing	View a list of service orders by status and priority. This report supports the business process of assigning resources to projects.	Resource Management, Reports, Service Order Listing, Service Order Listing Click Run to run the report by using PeopleSoft Process Scheduler.	RUN_SRS2000-
SRS2015 Assignments Listing Report	View a list of resources currently on assignment. This report supports the business process of assigning resources to projects.	Resource Management, Reports, Assignment Listing, Assignment Listing Report Click Run to run the report using the PeopleSoft Process Scheduler.	RUN_SRS2015-

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

Scheduled Utilization

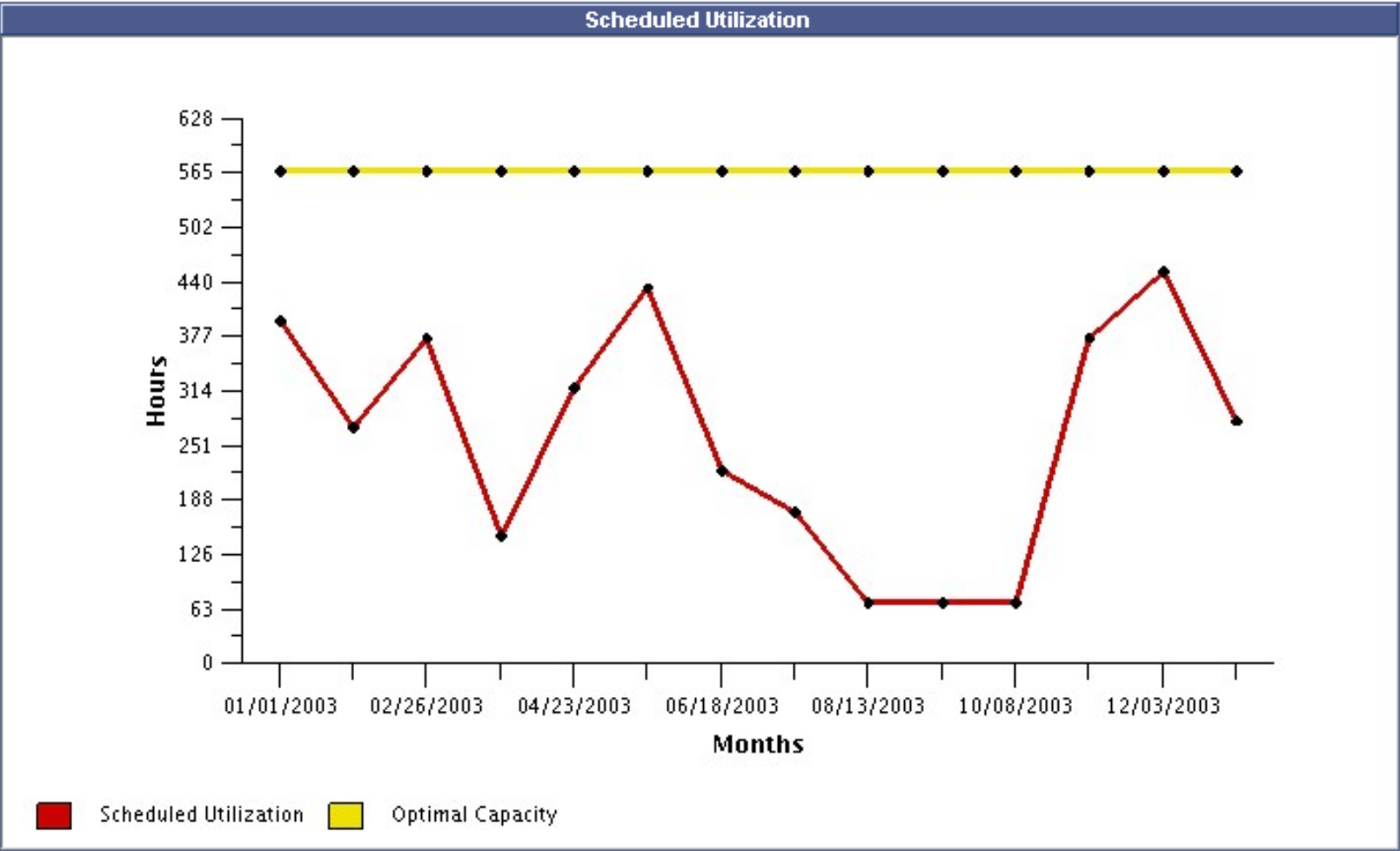
Scheduled_Utilization

In order to run the report, you need to fill in a start and end date then click on the Generate Report button to create the Utilization chart. Click on the hyperlink Report Parameters at the right of the page to set more parameters for the chart. Click on the Go to Resource List hyperlink at the bottom of the page to view the Resources in the chart.

*Start Date: 01/01/2003 31 *End Date: 12/31/2003 31

Generate Report

[Go To Report Parameters](#)



Scheduled Utilization

Scheduled_Utilization

Employee Statistics			Customize		Find			First		1-17 of 17		Last
Name	Type	%Utilized										
John Bendetto	Hourly	34.3										
Jessica Bendetto	Hourly	31.0										
Petros Hemani	Hourly	0.0										
Tomas Sherwood	Hourly	0.0										
Vicki Zinn	Hourly	105.7										
Gertie Saint-Amand	Hourly	0.0										
Wendy Kwan	Hourly	0.0										
Gunther Kiley	Hourly	0.0										
Dena Myers	Salaried	0.0										
Bruce Baker	Hourly	16.2										
Mickey Samsun	Hourly	0.0										
Luke Jameson	Hourly	0.0										
Dylan Anderson	Hourly	24.2										
Savannah Rogers	Hourly	0.0										
Thomas Crump	Hourly	0.0										
Patricia Morse	Hourly	0.0										
Cheyenne Wells	Hourly	0.0										

* The default standard bill rate was used to calculate the statistics for this employee.
The default standard work hours were used to calculate the statistics for this employee.

[Go To Utilization Chart](#)

Unassigned Resources

Unassigned_Resources

Please select a start and end date then click on the chart button to create the Unassigned Resources chart. Click on the hyperlink Report Parameters at the right of the page to set more parameters for the chart. Click on the different bars of the chart to view a list of Unassigned or Assigned Resources.

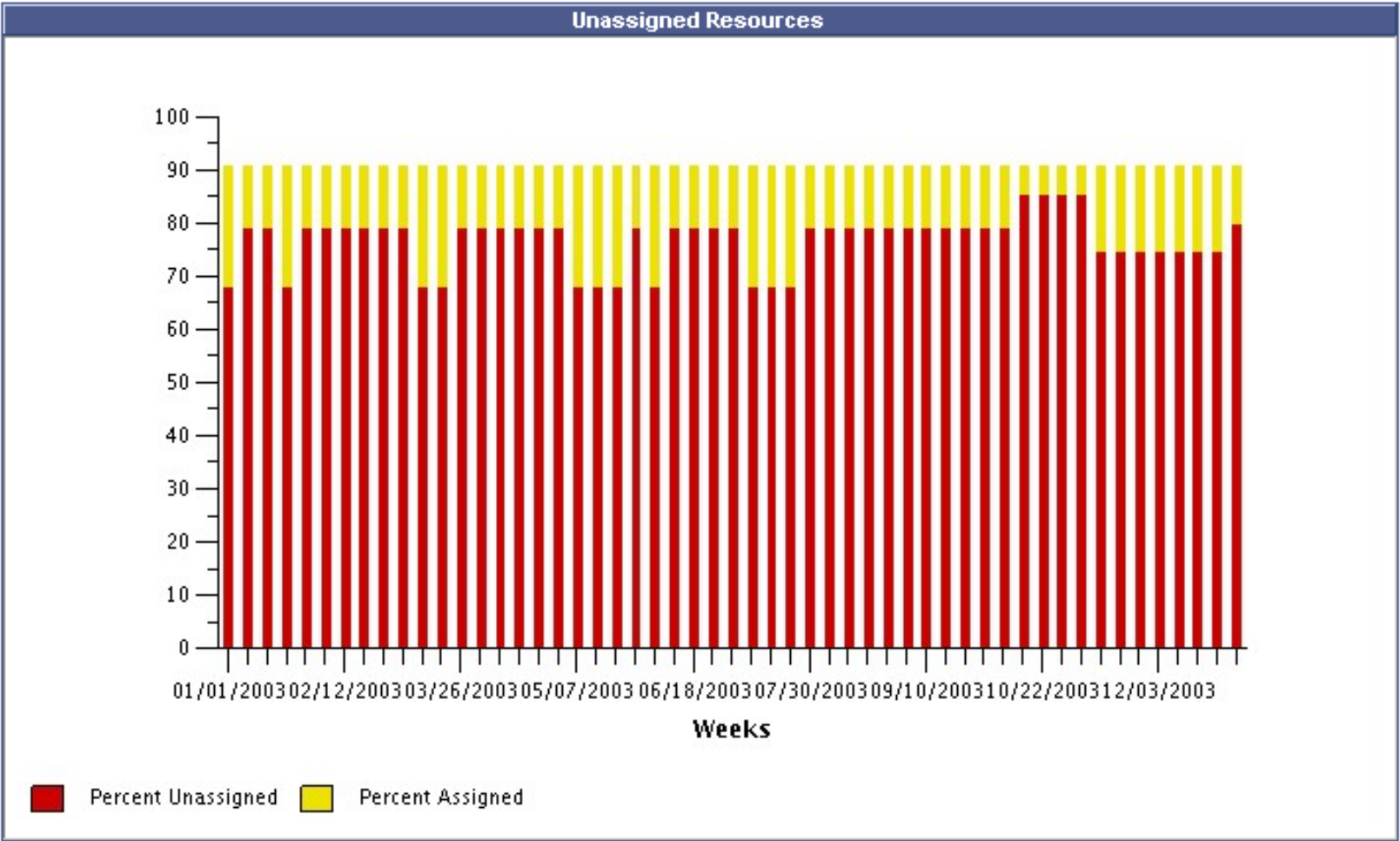
*Start Date: 01/01/2003 31 *End Date: 12/31/2003 31

Generate Report

[Go To Report Parameters](#)

Organizational Unit Totals

Percentage of Resources Unassigned for Report Period: 94.00

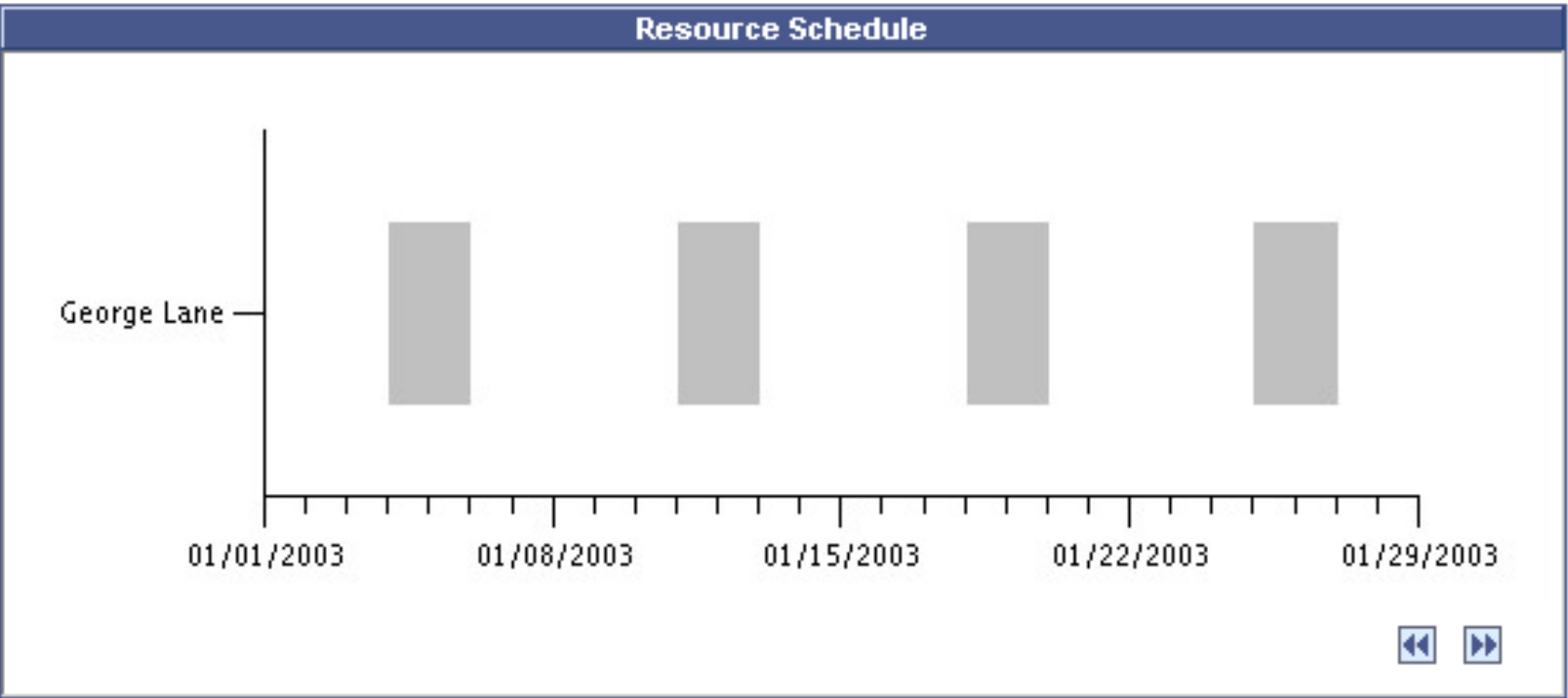


Assignments Ending

Assignments_Ending

George Lane

Specialties
DB2
Web Server Administration



[Go To Resource List](#)

Assignments Ending

Assignments_Ending

Generate Report

[Go To Report Parameters](#)

Resources			Customize Find 	First 	1-16 of 16	 Last
Name	Employee ID	End Date of Last Assignment				
John Bendetto	KU0011	07/30/2003				
Michael Buhler	KU0012	01/30/2003				
Carmichael Espinosa	KU0015	04/18/2003				
Edwin Tyler	KU0016	04/30/2003				
Jessica Bendetto	KU0021	05/30/2003				
Cornelia Aguilar	KU0035	12/31/2003				
Nancy Ball	KU0079	06/30/2003				
Cynthia Panther	KUN005	12/31/2003				
Isabella Rohein	KUN006	12/31/2003				
George Lane	RS00000001	11/30/2003				
Bruce Baker	RS00000016	06/30/2003				
Dylan Anderson	RS00000019	03/31/2003				
Kevin Artz	RS00000031	06/30/2003				
Carol Bonds	RS00000035	05/16/2003				
Jillian Anders	RS00000043	07/31/2003				
Kim Bauer	RS00000047	05/16/2003				

Chart Resource Schedules

Chart_Resources_Schedules

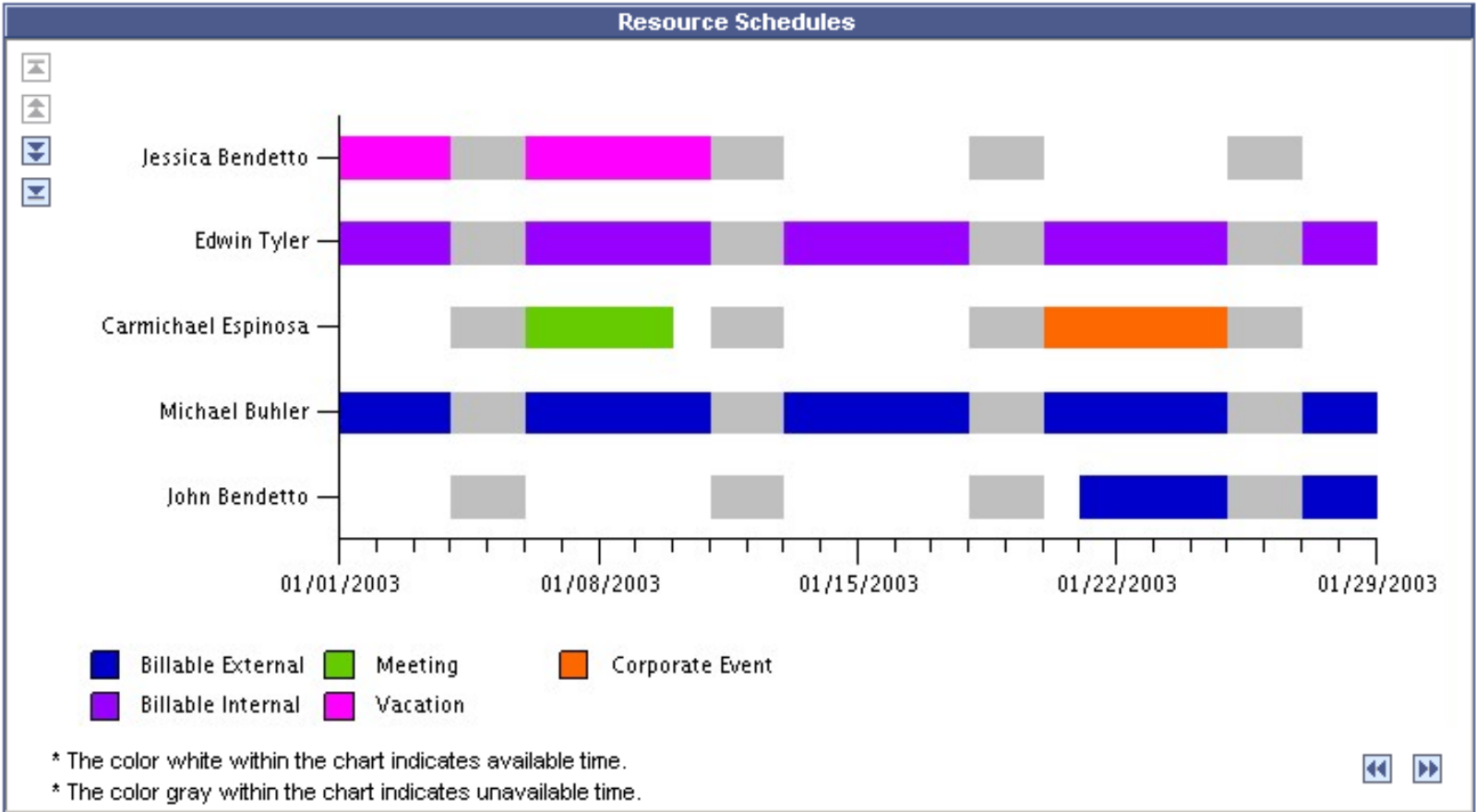
Please select a start date and sort order then click on the chart button to create the resource schedule chart. Click on the hyperlink Report Parameters at the right of the page to set more parameters for the chart. You can use the buttons to the left of the chart to page through groups of resources. Use the buttons below the chart to view schedules for the next or previous time period.

*Start Date: 01/01/2003 

*Sort Employees by: Employee ID  Ascending 

[Generate Report](#)

[Go To Report Parameters](#)



Average Staffing Time

Average_Staffing_Time

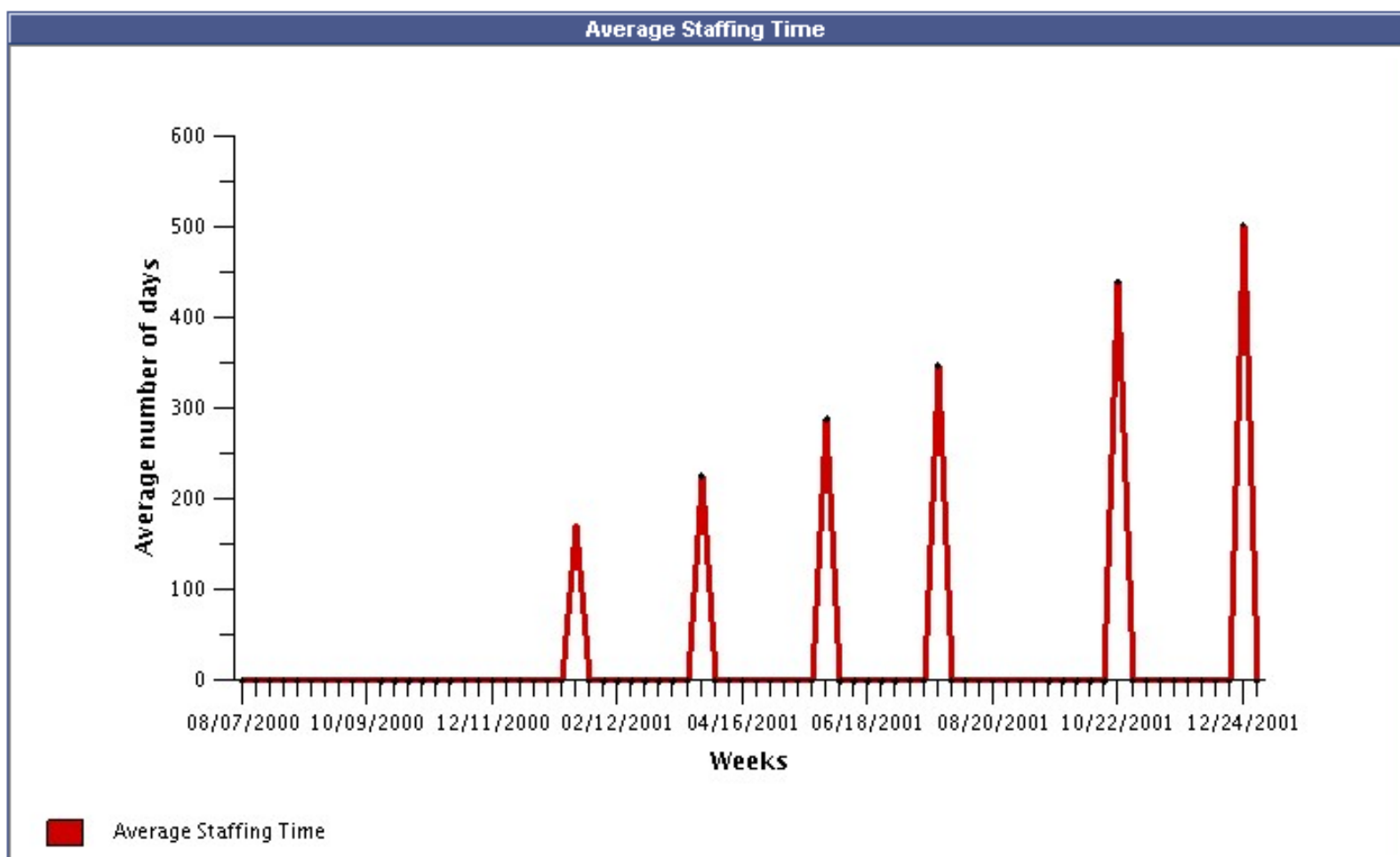
In order to run the report, you need to fill in a start and end date then click on the Generate Report button to create the Average Staffing chart. Click on the hyperlink Report Parameters at the right of the page to set more parameters for the chart.

*Start Date: 08/01/2003  *End Date: 12/31/2003 

[Generate Report](#)

[Go To Report Parameters](#)

Total Service Orders:	6
Average Staffing Time:	328.8
Average Number Of Requests:	1.8



[Go to Average Staffing Time per Priority](#)

Average Staffing Time

Average_Staffing_Time

Average Staffing Time per Priority

Customize | Find | 

First  1 of 1  Last

Service Order Priority	Average Staffing Time	Total Service Orders	Average Number Of Requests
M	328.8	6	1.8

[Go To Average Staffing Time Chart](#)

Most Requested Competencies & Accomplishments

Most_Requested_Competencies

Competencies	
Description	Number of Requests
PeopleCode	6
nVision	5
PS Query	5
Proj Mgmt	1

Accomplishments	
Description	Number of Requests
English	4
Advanced	1
French	1

[Return to Report](#)

Most Requested Competencies & Accomplishments

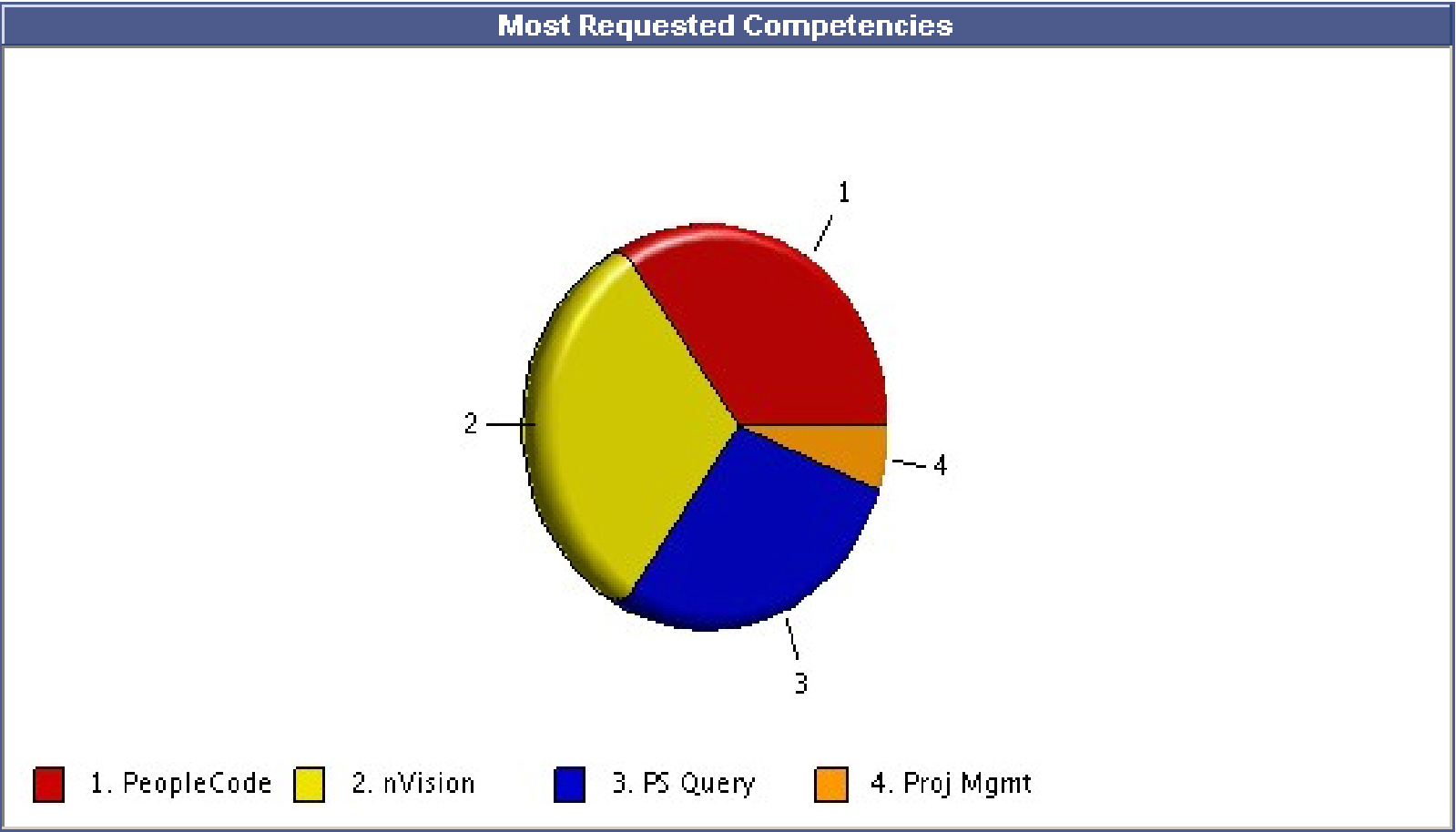
Most_Requested_Competencies

Number of Results:

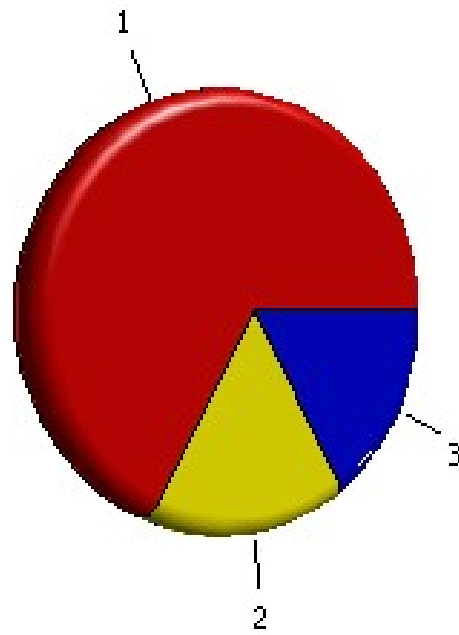
*Start Date:

Service Order Business Unit:

[Generate Report](#)



Most Requested Accomplishments



1. English 2. Advanced 3. French

TEST OPT

Projected Utilization (%): 81.30 Average Fitness Score (%): 79.41

Projected Revenue: 97100.00 Currency Code: USD

Number of Delayed Requests: 1

Customize Find View All  First  1-22 of 22  Last					
Resource Request ID	EmplID	Name	Resource Request Date Ranges	Qualifications Fit Score	Preferences Fit Score
US004 / 0000000020 / 1	KU0090	Chloe Frumman	13 January 2004 - 14 January 2004	100%	50%
	KU0102	Gladys Sherwood	13 January 2004 - 14 January 2004	50%	25%
US004 / 0000000020 / 2	KU0090	Chloe Frumman	01 January 2004 - 05 January 2004	60%	30%
US004 / 0000000020 / 3	KU0022	Cornelia Turner	06 January 2004 - 08 January 2004	57%	29%
	KU0102	Gladys Sherwood	06 January 2004 - 08 January 2004	57%	29%
US004 / 0000000020 / 4	KU0089	Bill Paul	01 January 2004 - 07 January 2004	75%	38%
US004 / 0000000020 / 5	KU0022	Cornelia Turner	09 January 2004 - 12 January 2004	100%	50%
	KU0023	Lucie Lotta	09 January 2004 - 12 January 2004	100%	50%
US004 / 0000000021 / 1	KU0083	Karena Matheson	02 January 2004 - 05 January 2004	100%	50%
US004 / 0000000021 / 3	KU0083	Karena Matheson	06 January 2004 - 08 January 2004	71%	36%
	KU0087	Edward Monroe	06 January 2004 - 08 January 2004	57%	29%
US004 / 0000000021 / 4	KU0062	Richard Day	01 January 2004 - 07 January 2004	100%	50%
US004 / 0000000021 / 5	KU0083	Karena Matheson	09 January 2004 - 12 January 2004	100%	50%
	KU0087	Edward Monroe	09 January 2004 - 12 January 2004	100%	50%
US006 / 0000000005 / 1	KU0090	Chloe Frumman	09 January 2004 - 12 January 2004	100%	50%
	KU0102	Gladys Sherwood	09 January 2004 - 12 January 2004	50%	25%
US006 / 0000000005 / 2	KU0022	Cornelia Turner	01 January 2004 - 05 January 2004	40%	20%
US006 / 0000000005 / 3	KU0023	Lucie Lotta	06 January 2004 - 08 January 2004	57%	29%
	KU0090	Chloe Frumman	06 January 2004 - 08 January 2004	71%	36%
US006 / 0000000005 / 4	KU0011	John Bendetto	01 January 2004 - 07 January 2004	100%	50%
US006 / 0000000005 / 5	KU0022	Cornelia Turner	13 January 2004 - 14 January 2004	100%	50%
	KU0023	Lucie Lotta	13 January 2004 - 14 January 2004	100%	50%



Report ID: SRS2000

Resource Management
SERVICE ORDER LISTING
Service Order Date Range: 1/1/2003 thru 12/31/2003

Page No. 1
Run Date 11/5/2003
Run Time 5:20:20 PM

Business Unit: US001
Customer Name: Alliance Group

Customer ID: 1000

Project ID: PORTAL

Service Order Header

<u>Service Order ID</u>	<u>Service Order Status</u>	<u>SO Priority</u>	<u>Service Order Date</u>	<u>Responsible for Staffing:</u>	<u>Entered By</u>	<u>Owning Organization</u>
0000000006	In Process	M	11/4/2003	VP1	VP1	Consulting Corp
<u>Description:</u> Project Lead					<u>Trainees Allowed?:</u>	N

Service Order Header

<u>Service Order ID</u>	<u>Service Order Status</u>	<u>SO Priority</u>	<u>Service Order Date</u>	<u>Responsible for Staffing:</u>	<u>Entered By</u>	<u>Owning Organization</u>
0000000007	In Process	M	11/4/2003	VP1	VP1	Consulting Corp
<u>Description:</u> Document Writer					<u>Trainees Allowed?:</u>	N

Service Order Header

<u>Service Order ID</u>	<u>Service Order Status</u>	<u>SO Priority</u>	<u>Service Order Date</u>	<u>Responsible for Staffing:</u>	<u>Entered By</u>	<u>Owning Organization</u>
0000000008	New	M	11/5/2003	VP1	VP1	Consulting Corp
<u>Description:</u> Document Writer					<u>Trainees Allowed?:</u>	N

Service Order Header

<u>Service Order ID</u>	<u>Service Order Status</u>	<u>SO Priority</u>	<u>Service Order Date</u>	<u>Responsible for Staffing:</u>	<u>Entered By</u>	<u>Owning Organization</u>
0000000009	Closed	M	11/5/2003	VP1	VP1	Finance
<u>Description:</u> Spreadsheet Analysis					<u>Trainees Allowed?:</u>	N

End of Report

Organizational Unit Being Analyzed: CONSULTING CORP

Business Unit: US001**Customer Name:** Alliance Group**Address:** 14410 Union Ave, San Jose, CA 95124 USA**Customer ID:** 1000**Phone:** 800/888-9090**Project ID:** PORTAL**Employees with Assignments**

<u>Employee Name</u>	<u>Employee ID</u>	<u>Assignment ID</u>	<u>Service Order ID</u>	<u>SO Line</u>	<u>Task Type</u>	<u>Start Date</u>	<u>End Date</u>	<u>Last Update Date/Time</u>
Bendetto, John	KU0011	0000000136	0000000007	1.00	BE	11/11/2003	2/1/2004	2003/11/04 11:29:25.00
Bendetto, Jessica	KU0021	0000000135	0000000006	2.00	BE	11/11/2003	1/1/2004	2003/11/04 10:56:47.00
Ball, Nancy	KU0079	0000000134	0000000006	1.00	BE	11/11/2003	1/1/2004	2003/11/04 10:54:10.00
Lane, George	RS00000001	0000000133		0.00	BE	11/3/2003	11/30/2003	2003/10/31 11:06:54.00
Anders, Jillian	RS00000043	0000000138	0000000009	1.00	BE	6/1/2003	7/31/2003	2003/11/05 17:12:39.00
Berrysmith, Sherry	RS00000048	0000000137	0000000007	2.00	BE	11/11/2003	2/1/2004	2003/11/04 11:31:42.00