PeopleSoft

PeopleSoft Resource Management 8.8 Reports

December 2003

PeopleSoft Resource Management 8.8 Reports

SKU FSCM88RMT-R 1203

Copyright © 1992-2003 PeopleSoft, Inc. All rights reserved.

Open Source Disclosure

Contents

Contents

About This PeopleBook

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

This preface discusses:

• Related documentation.

• Comments and suggestions.

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

• Email

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

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.

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 *End Date: 12/31/2003

Generate Report

Go To Report Parameters

Scheduled Utilization

Scheduled Utilization

Scheduled_Utilization

Employee Statistics		
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
Cheyanne 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 📅 ***End Date:** 12/31/2003 📅

Generate Report   Go To Report Parameters

Organizational Unit Totals

Percentage of Resources Unassigned for Report Period: 94.00

Unassigned Resources

■ Percent Unassigned   □ Percent Assigned
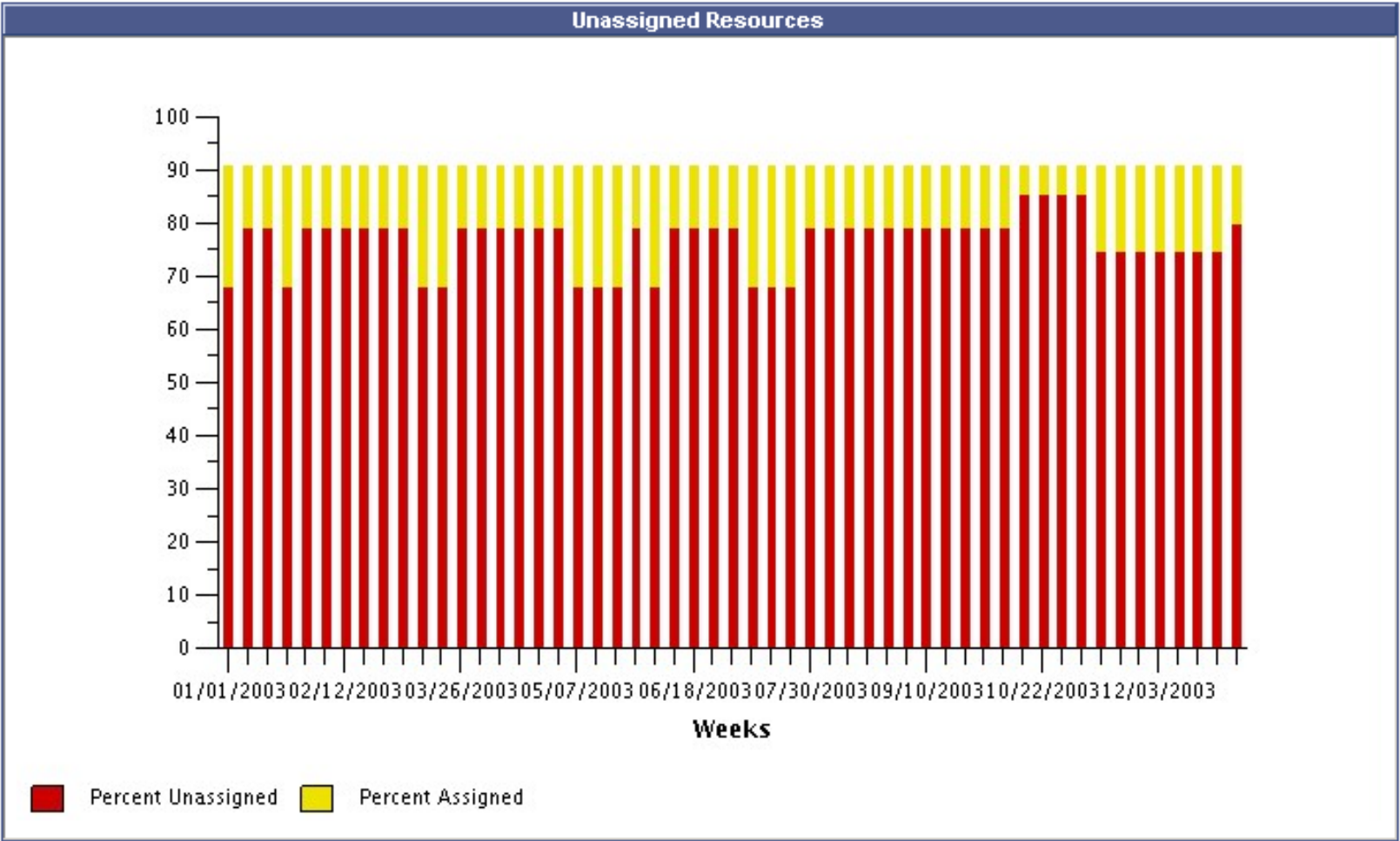
Assignments Ending

Assignments_Ending

George Lane

Specialties
DB2
Web Server Administration

Resource Schedule
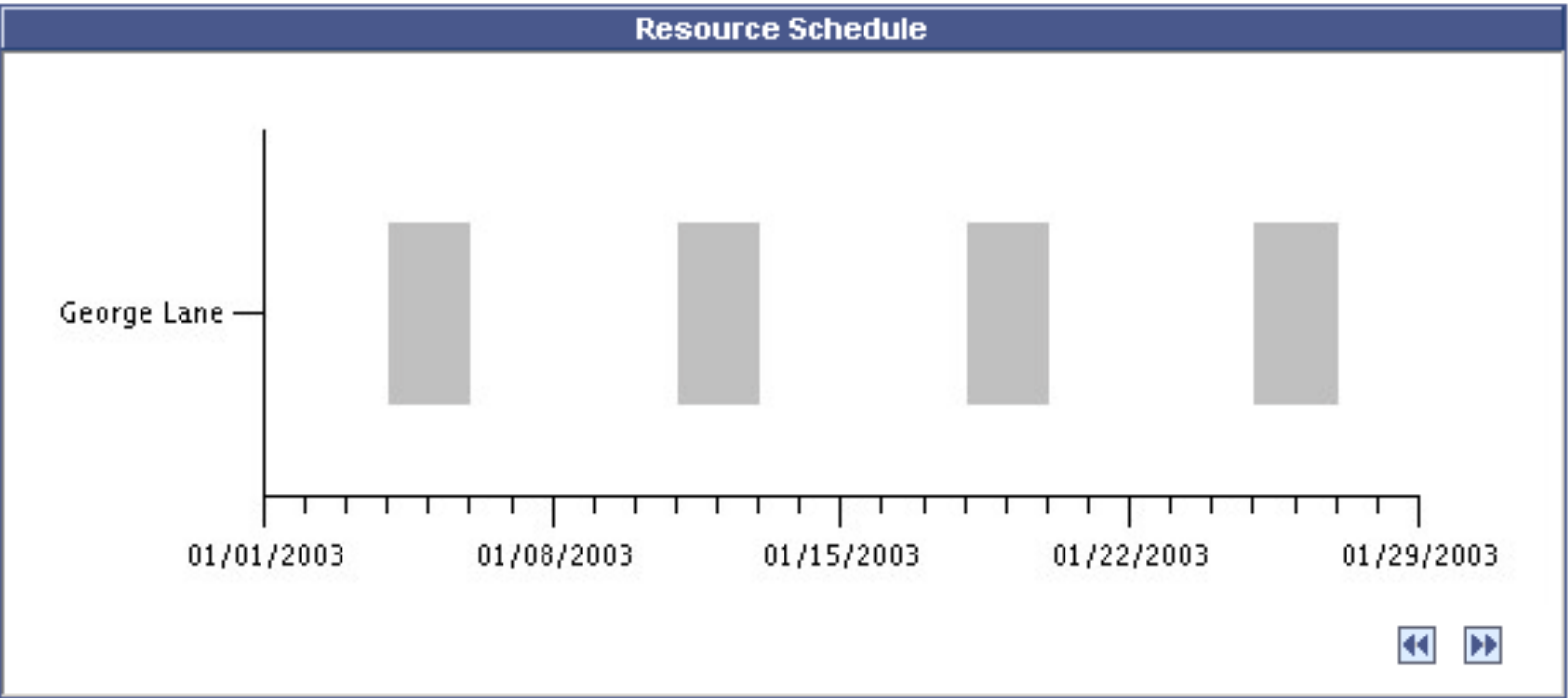
Go To Resource List

Assignments Ending

Assignments_Ending

[Generate Report]

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

Resource Schedules

	Billable External		Meeting		Corporate Event
	Billable Internal		Vacation		

* The color white within the chart indicates available time.
* The color gray within the chart indicates unavailable time.
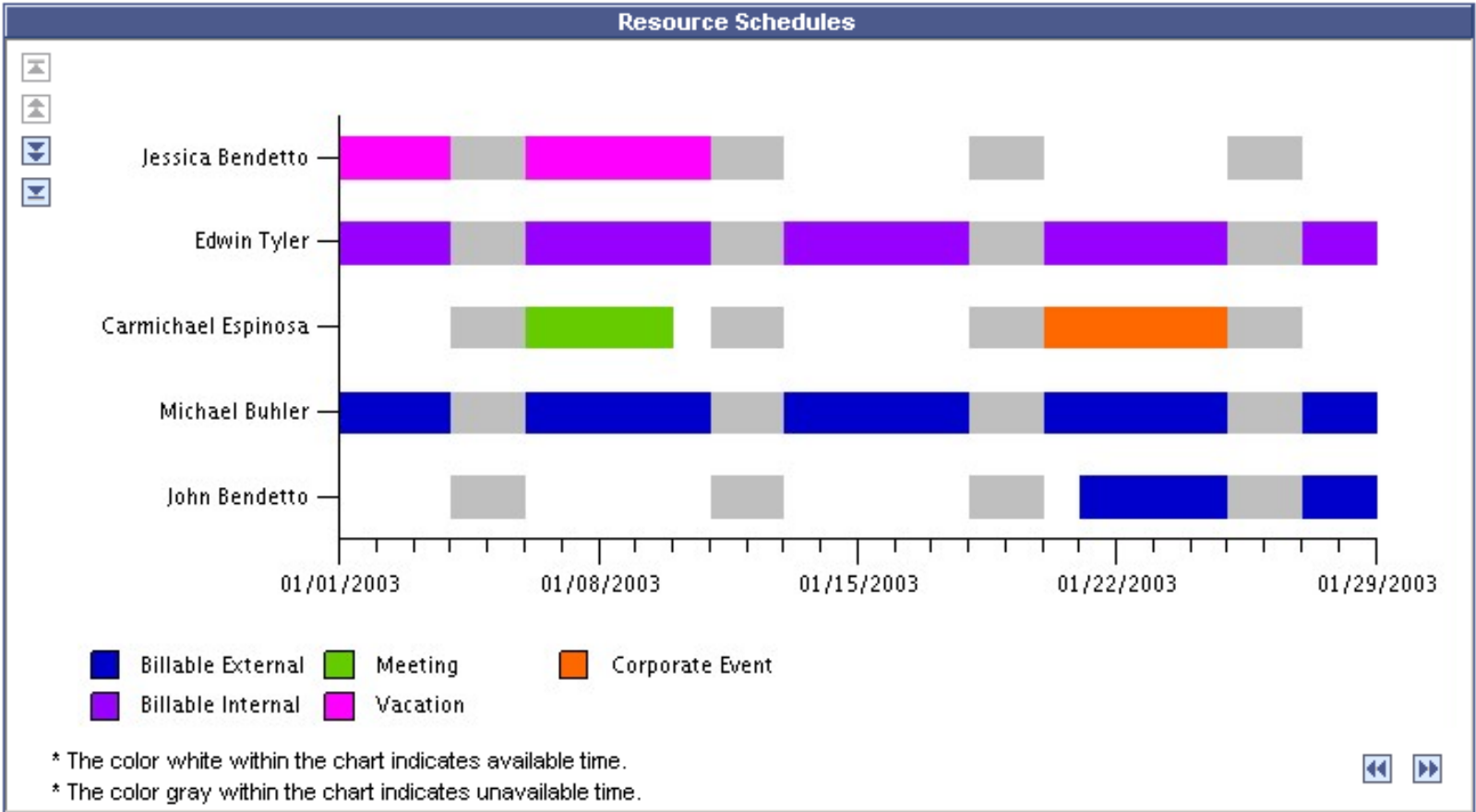
Average Staffing Time

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

Average Staffing Time
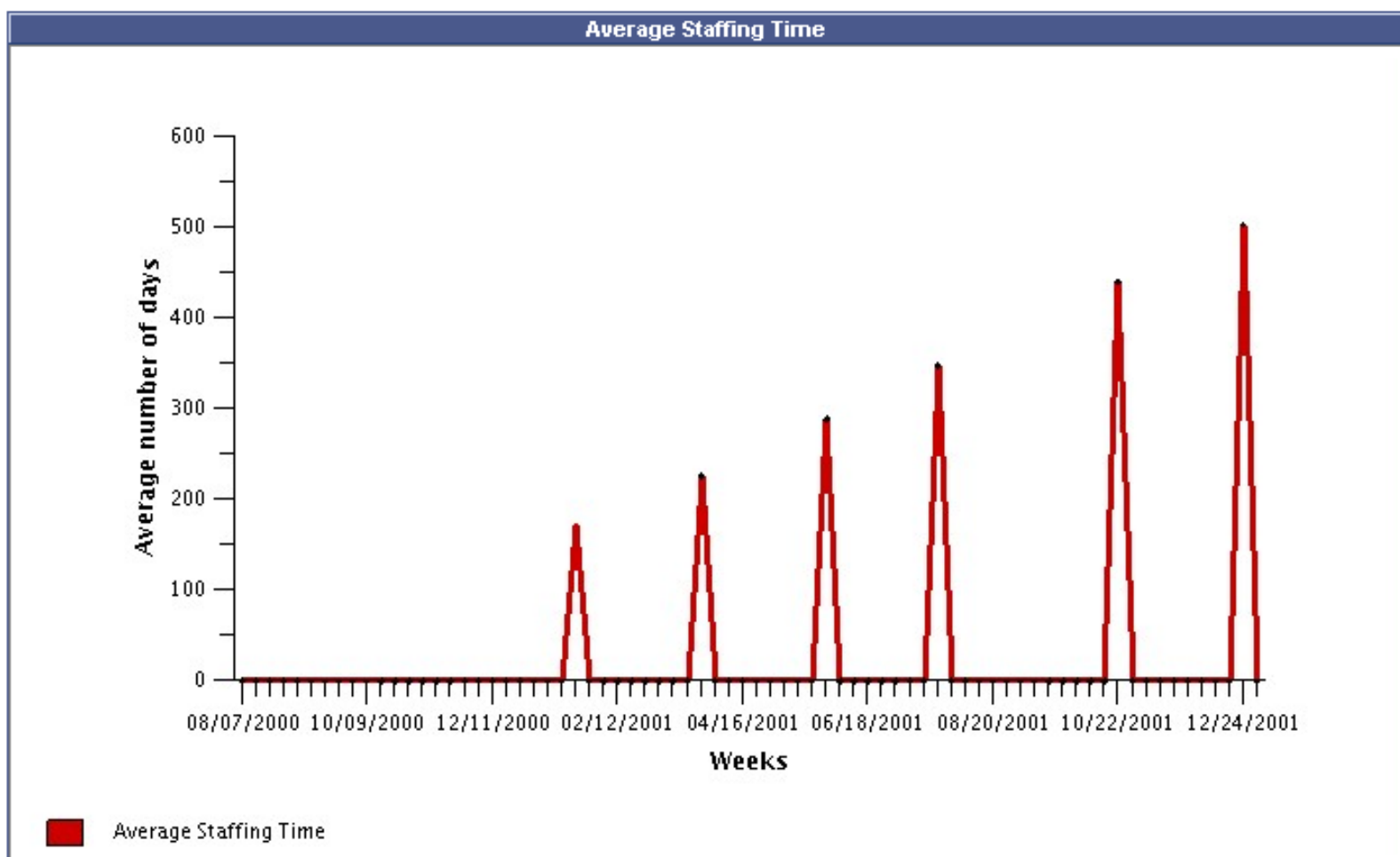
Go to Average Staffing Time per Priority

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: 4

*Start Date: 01/01/2003 📅

Service Order Business Unit: US001 🔍

Generate Report

Most Requested Competencies

🟥 1. PeopleCode   🟨 2. nVision   🟦 3. PS Query   🟧 4. Proj Mgmt

Most Requested Accomplishments

Legend: 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

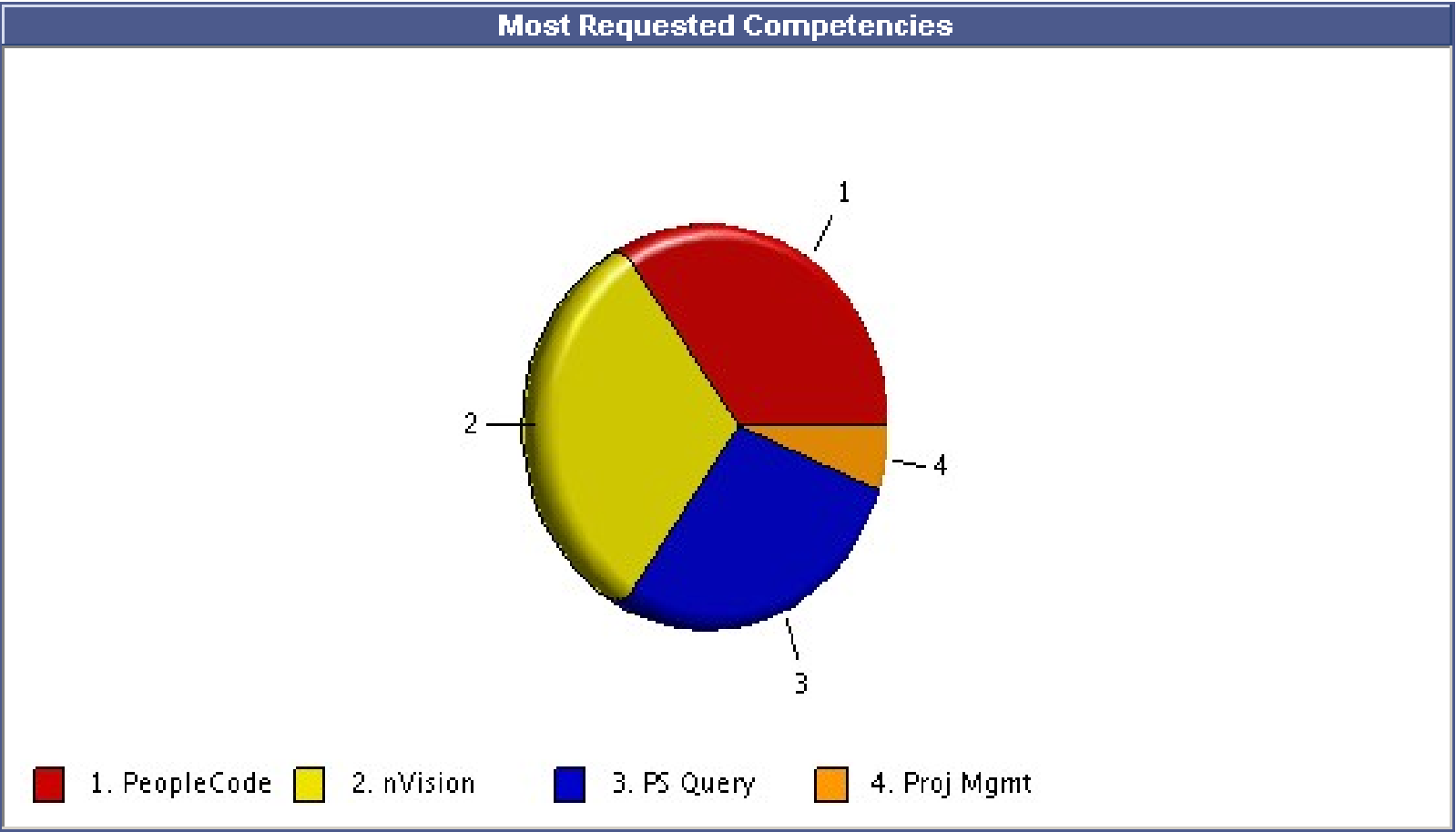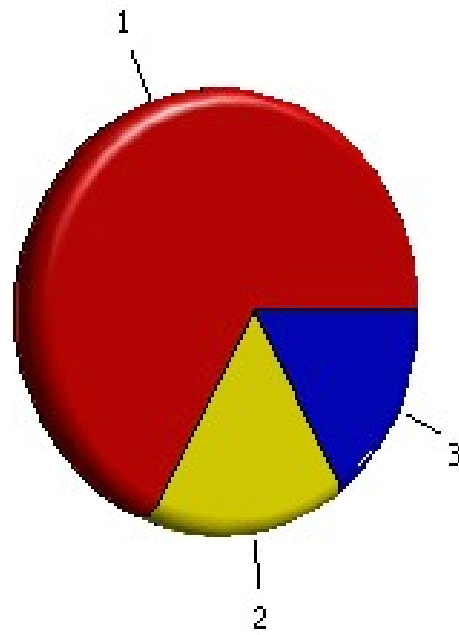| Resource Request ID	EmplID	Name	Resource Request Date Ranges	Qualifications Fit Score	Preferences Fit Score
US004 / 0000000020 / 1	KU0090	Chloe Frumman	13 January 2004 - 14 January 2004	100%	50%
	KU0102	Gladys Sherwood	13 January 2004 - 14 January 2004	50%	25%
US004 / 0000000020 / 2	KU0090	Chloe Frumman	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%

PeopleSoft. **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

Service Order ID	Service Order Status	SO Priority	Service Order Date	Responsible for Staffing:	Entered By	Owning Organization
0000000006	In Process	M	11/4/2003	VP1	VP1	Consulting Corp
Description:	Project Lead				Trainees Allowed?:	N

Service Order Header

Service Order ID	Service Order Status	SO Priority	Service Order Date	Responsible for Staffing:	Entered By	Owning Organization
0000000007	In Process	M	11/4/2003	VP1	VP1	Consulting Corp
Description:	Document Writer				Trainees Allowed?:	N

Service Order Header

Service Order ID	Service Order Status	SO Priority	Service Order Date	Responsible for Staffing:	Entered By	Owning Organization
0000000008	New	M	11/5/2003	VP1	VP1	Consulting Corp
Description:	Document Writer				Trainees Allowed?:	N

Service Order Header

Service Order ID	Service Order Status	SO Priority	Service Order Date	Responsible for Staffing:	Entered By	Owning Organization
0000000009	Closed	M	11/5/2003	VP1	VP1	Finance
Description:	Spreadsheet Analysis				Trainees Allowed?:	N

End of Report

PeopleSoft. **Report ID: SRS2015**

Resource Management
ASSIGNMENT LISTING
Period: 1/1/2003 thru 12/31/2003

Page No. **1**
Run Date **11/5/2003**
Run Time **5:24:22 PM**

Organizational Unit Being Analyzed: CONSULTING CORP
Business Unit: US001

Customer Name: Alliance Group	**Customer ID:** 1000
Address: 14410 Union Ave, San Jose, CA 95124 USA	**Phone:** 800/888-9090

Project ID: PORTAL

Employees with Assignments

Employee Name	Employee ID	Assignment ID	Service Order ID	SO Line	Task Type	Start Date	End Date	Last Update Date/Time
Bendetto,John	KU0011	0000000136	0000000007	1.00	BE	11/11/2003	2/1/2004	2003/11/04 11:29:25.0(
Bendetto,Jessica	KU0021	0000000135	0000000006	2.00	BE	11/11/2003	1/1/2004	2003/11/04 10:56:47.0(
Ball,Nancy	KU0079	0000000134	0000000006	1.00	BE	11/11/2003	1/1/2004	2003/11/04 10:54:10.0(
Lane,George	RS00000001	0000000133		0.00	BE	11/3/2003	11/30/2003	2003/10/31 11:06:54.0(
Anders,Jillian	RS00000043	0000000138	0000000009	1.00	BE	6/1/2003	7/31/2003	2003/11/05 17:12:39.0(
Berrysmith,Sherry	RS00000048	0000000137	0000000007	2.00	BE	11/11/2003	2/1/2004	2003/11/04 11:31:42.0(

End of Report