PeopleSoft®

PeopleSoft Enterprise Resource Management 8.9 PeopleBook

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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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 website. 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, https://www.peoplesoft.com/corp/en/login.jsp

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 website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	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 letter *O*.
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 the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (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.

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.

If the note is preceded by *Important!,* the note 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.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools 8.46 PeopleBook: Using PeopleSoft Applications

PeopleSoft Enterprise Resource Management Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft application fundamentals.
- Pages with deferred processing.

Note. This PeopleBook documents 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 it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

PeopleSoft Products

This PeopleBook refers to these products:

- PeopleSoft Enterprise Billing.
- PeopleSoft Enterprise Cash Management.
- PeopleSoft Enterprise Contracts.
- PeopleSoft Enterprise General Ledger.
- PeopleSoft Enterprise Order Management.
- PeopleSoft Enterprise Payables.
- PeopleSoft Enterprise Pay/Bill Management.
- PeopleSoft Enterprise Program Management.
- PeopleSoft Enterprise Project Costing.
- PeopleSoft Enterprise Purchasing.
- PeopleSoft Enterprise Staffing Front Office.

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Resource Management PeopleBook* provides you with implementation and processing information for the Resource Management system. However, additional, essential information describing the setup and design of the system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise Application Fundamentals 8.9 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.

The following companion PeopleBooks apply specifically to Resource Management:

- *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook.*
- *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook.*
- *PeopleSoft Enterprise Program Management 8.9 PeopleBook.*
- *PeopleSoft Enterprise Project Costing 8.9 PeopleBook.*
- *PeopleSoft Enterprise Commitment Control 8.9 PeopleBook*
- *PeopleSoft Enterprise Staffing Front Office 8.9 PeopleBook.*

Note. One or more pages in Resource Management operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook.*

Pages with Deferred Processing

Several pages in Resource Management operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values that are on the page—for example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

See The guidelines for designing pages in the *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer.*

CHAPTER 1

Getting Started with PeopleSoft Enterprise Resource Management

This chapter discusses:

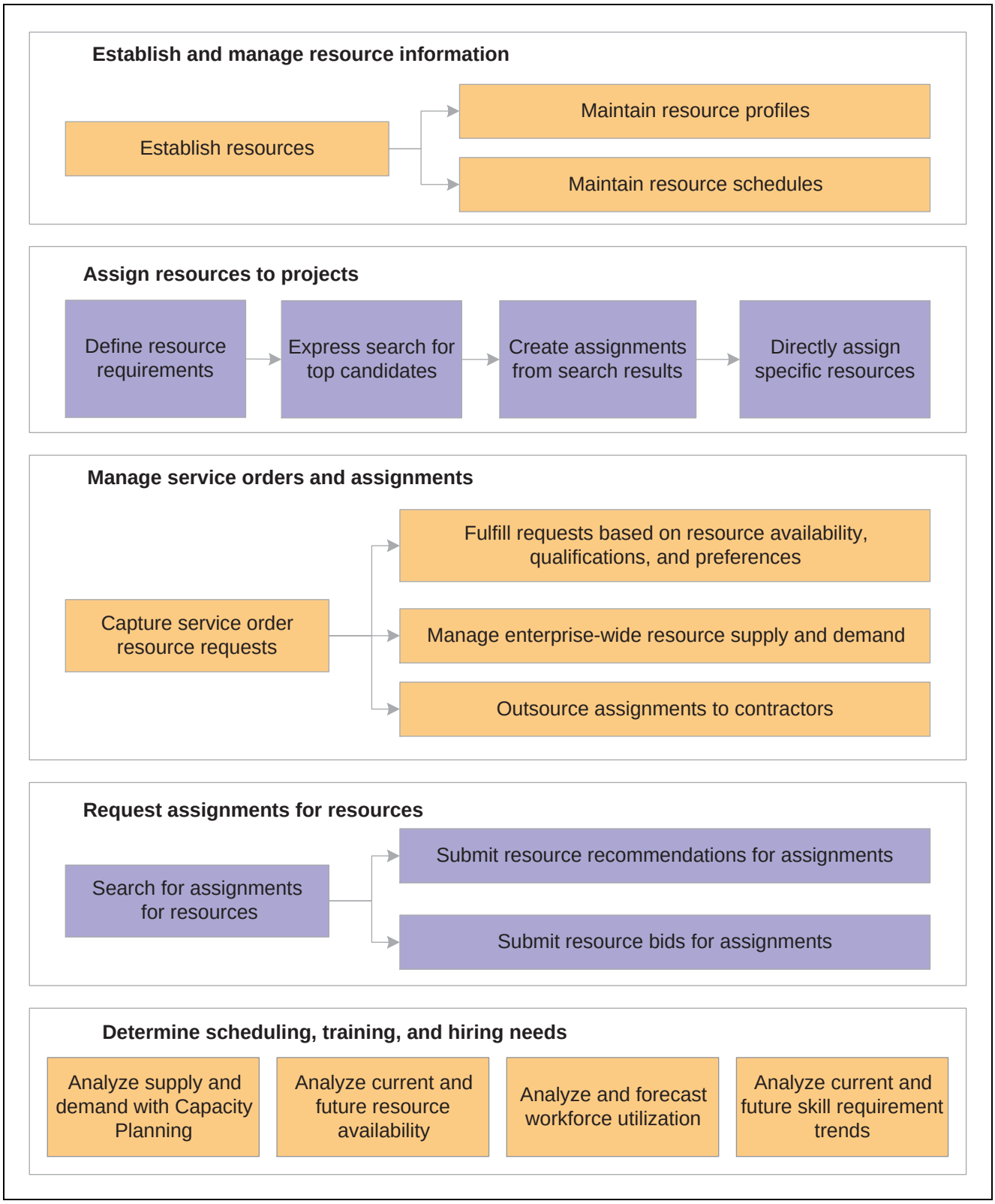
- Resource Management overview.
- Resource Management business processes.
- Resource Management integrations.
- Resource Management implementation.

PeopleSoft Resource Management Overview

To successfully deliver professional services (or internal services), managers must have effective tools to perform optimal capacity planning, quickly find the right resources for jobs and anticipate resource supply and demand. Employees should also have the tools that enable them to shape the direction of their careers. Resource Management meets these challenges by optimizing resources, planning and managing resource supply and demand, and assisting employees with finding new jobs.

PeopleSoft Resource Management Business Processes

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



PeopleSoft Resource Management business processes

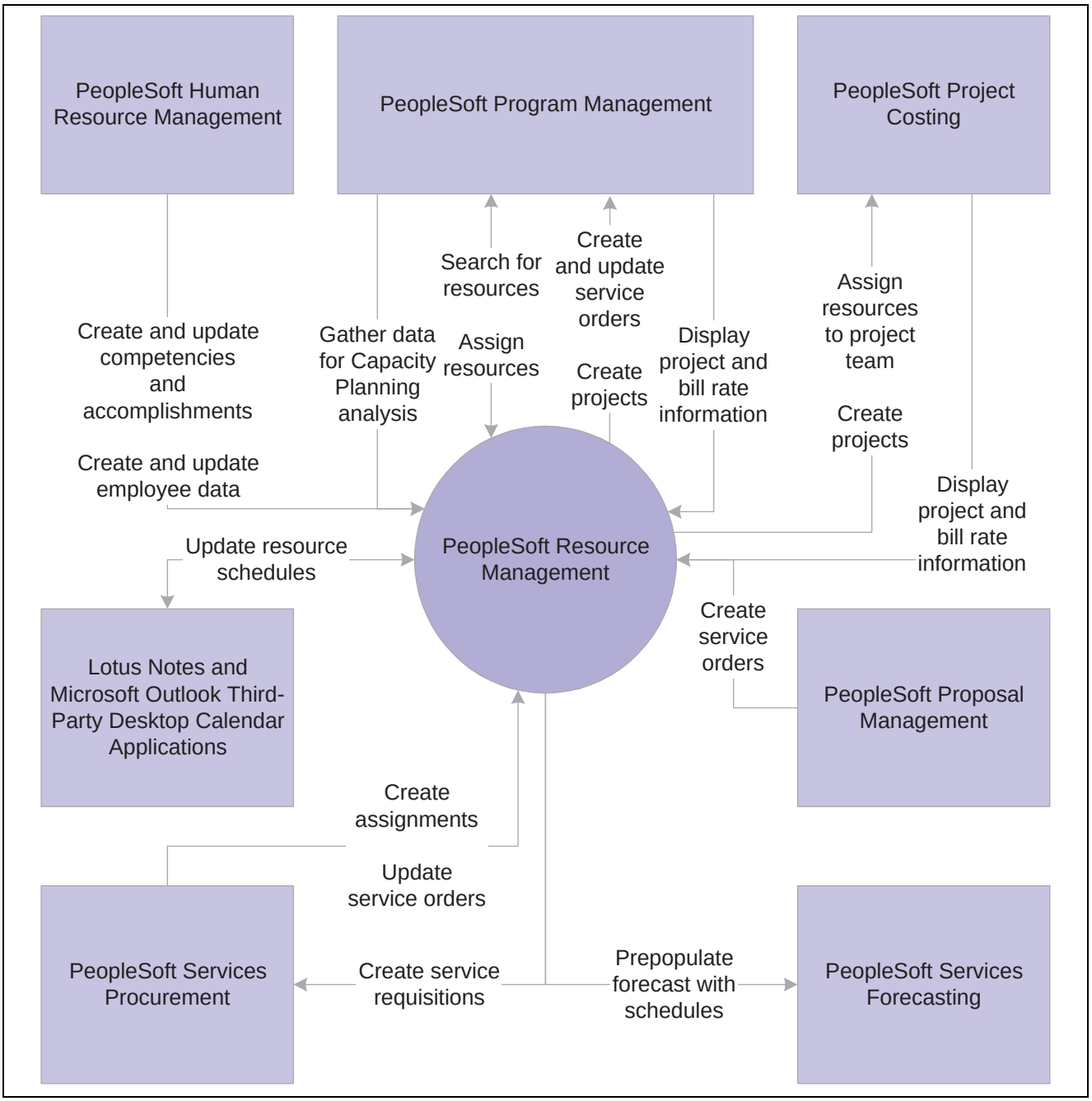
We discuss these business processes in the business process chapters in this PeopleBook.

See Also

Chapter 2, "Understanding PeopleSoft Resource Management Business Processes," page 7

PeopleSoft Resource Management Integrations

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 77

Chapter 11, "Integrating PeopleSoft Resource Management with Other Applications," page 111

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.

Resource Management also provides component interfaces to help you load data from an existing system into 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 92.
RS_CM_PERSONAL	RS_CM_PERSONAL	See Chapter 9, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Creating Employee Data Files, page 94.
RS_CUST_INFO	RS_CUST_INFO	See Chapter 12, "Establishing Customers," Working with Customer and Contact Profiles, page 124.
RS_WRKR_CREATE	RS_WRKR_CREATE	See Chapter 13, "Establishing Resources," Establishing and Maintaining Employees and Non-Employees as Resources, page 128.

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 *About These PeopleBooks,* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "PeopleSoft Enterprise Application Fundamentals PeopleBook Preface"

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Component Interfaces

About These PeopleBooks

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.
- Capacity planning.

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.
  - Maintaining resource pools.
- Assigning resources to projects, including:
  - Defining resource requirements.
  - Performing express searches for the best candidates.
  - Creating assignments from search results.
  - Directly assigning specific resources.
- Managing service orders, generic resource requests, 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.
  - Conducting capacity planning to balance resource supply with project demand.

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

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 pools.
- Resource schedules.
- Assignments.
- Service orders.

Resource Profiles

Resource Management presents employee information as an editable resource profile that organizes the information from the employee source database and adds information relevant to Resource Management. The resource profile functions 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 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 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.

Note. If an employee is established as both a Resource Management resource and an Asset Lifecycle Management resource, resource profiles may be affected.

Resource Pools

Resource pools support the staffing process and provide a mechanism to organize supply in a meaningful way to support Capacity Planning functionality. You can choose to structure your resources based on resource pools, and you can group your resources in any configuration in order to support their operations.

You can group resources into resource pools and define them in a hierarchy to establish relationships between different pools, thus enabling roll-up for analytics and reporting. You can model your resource pools on your company's organizational structure, but the way you categorize and manage your resources from a capacity standpoint can vary greatly from your organizational structure; pools may encompass a lower level of granularity or may group resources in a different ways.

You can also search for resources in the workbench and narrow your results by resource pool.

Resource Schedules

Resource Management uses the resource schedule to interactively manage a resource's availability for assignments. The following individuals can view and update the schedule:

- Resource
- Resource manager
- Project manager
- Practice manager
- Pool manager
- Staffing coordinator

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 a resource is established as a Resource Management resource and an Asset Lifecycle Management resource, a Staffing Front Office resource, or both, the schedule will show all assignments that were made through any of these products for this resource.

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. You can create assignments that specify the exact number of hours and minutes a resource is to be assigned to a job. You create assignments 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.

- The creation and fulfillment of generic resource requests.

  You can use this process if you manage your resources with resource pools. Project managers can create generic resource requests from their project team. The requests are routed to the pool manager for approval and staffing.

If you use Program Management, you can select a resource and create an assignment using any of the preceding processes. The resource must be managed in 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 Resource Management. Conversely, changes to the assignment in Resource Management are reflected in Program Management.

If you use Project Costing, a resource is added to the project team in Project Costing when you create an assignment for the resource in 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 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 Resource Management implementation.

Service Orders

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

If you use 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

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.

Resource Matching 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.
- Search for resources to fulfill generic resource requests by using the Pool Manager Workbench - Fulfill Request page.

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

The Express Search feature provides an alternative, ad hoc method of finding resources in 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 that 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.

Capacity Planning

Resource Management provides Information Technology (IT) and development organizations with capacity planning functionality to empower managers who make important demand commitment decisions based upon limited resources or capacity information. This functionality evaluates all demand for labor resources captured in projects , as well as demand captured from external sources and imported through an Excel-to-CI process, and compares them with available Resource Management resources.

Strategic Capacity Planning (SCP) is primarily concerned with long-term projections and decisions, whereas Operational Capacity Planning (OCP) consists of tactical or immediate resource load projections for a period of one day up to six months.

In order to fully use the SCP functionality (from demand), Program Management and Project Costing are required to obtain demand in projects. Demand is obtained from projects and external demand, and not from service orders.

SCP provides management with:

- The ability to create and join a supply and demand forecast that highlight future resource gaps and gluts.
- The flexibility of performing what-if scenario analyses to find the optimal mix of demand and supply.
- Resource plans in order to resolve future resource imbalances.

OCP provides pool managers, resource managers, and program managers with the following tools to overcome day-to-day operational challenges:

- Operational analytics that provide information on total, assigned, remaining available capacity for resources.
- Supply categories to classify resources more interchangeably.
- Generic resource allocation to reserve pool capacity.
- The ability to transfer a resource’s assignments to another available resource.

CHAPTER 3

Understanding Resource Matching

This chapter discusses:

- Resource Matching using Verity.
- Features using Resource Matching.
- Resource Matching fit score calculations.

Resource Matching Using Verity

This section lists prerequisites and discusses:

- Resource Matching purpose.
- Verity search engine.
- Resource Matching Verity components.
- Factors, factor groups, and objective fit.
- Flexible attributes.
- Relative importance of factors and factor families.
- Resource matching automatic and batch processes.
- Resource groups.

Prerequisites

You must satisfy these prerequisites before you can use Resource Matching:

- Select Resource Matching options during implementation from Common Definitions.

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

- Optionally define flexible attributes.

  See Chapter 17, "Enabling Resource Matching and Cache Processes," Defining Flexible Attributes, page 179.

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

  See *PeopleTools PeopleBook: PeopleSoft Server Tools Administration*

Resource Matching Purpose

The Resource Matching 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.

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

Verity Search Engine

Resource Matching uses the Verity search engine to quickly calculate scores for each resource. Verity is a third-party search engine tool licensed by PeopleTools that enables PeopleSoft applications to 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.

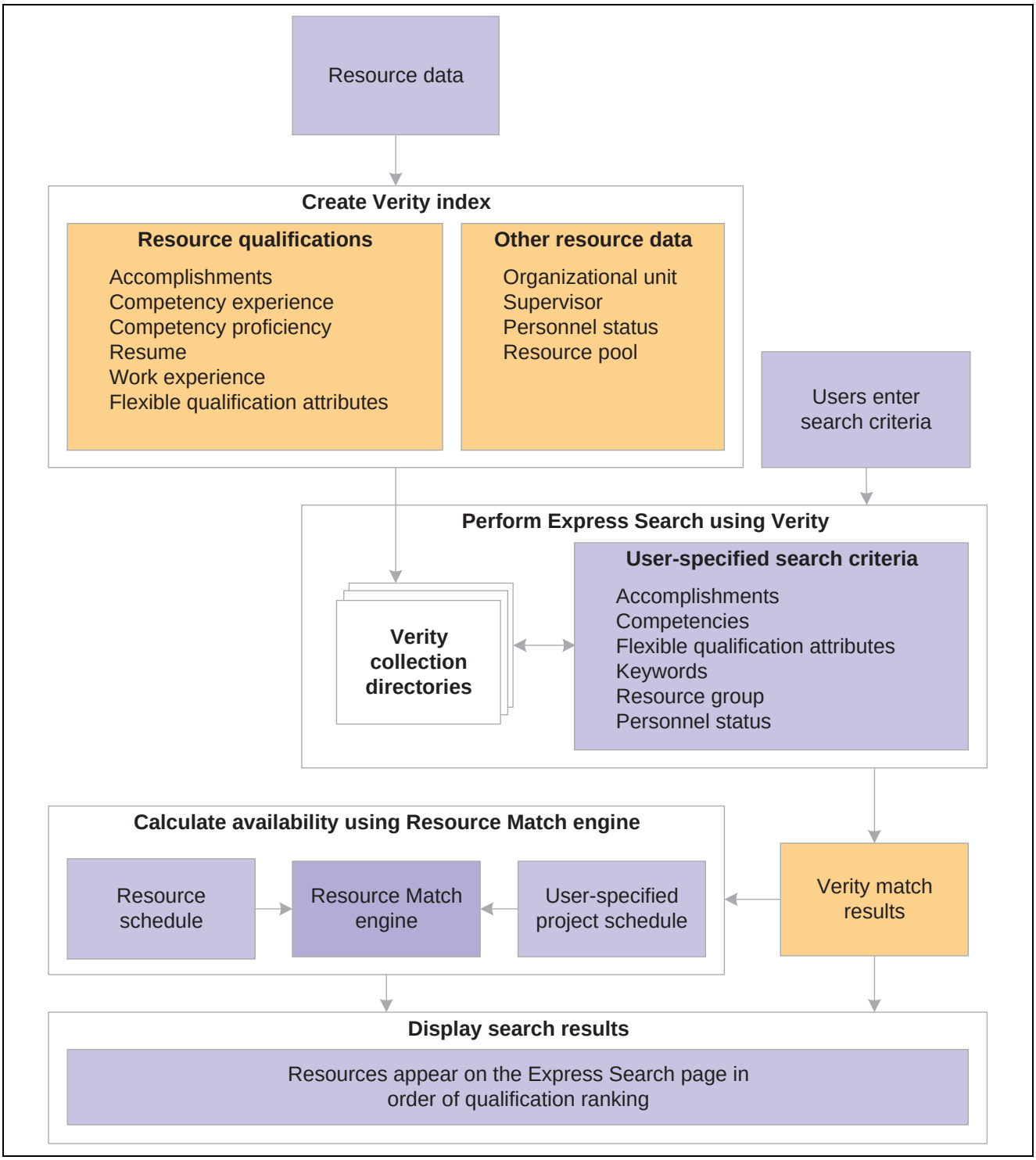
The Verity index contains this information about each eligible resource:

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

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

Resource Matching Verity Components

This diagram shows the Verity components that fuel the Resource Matching calculations:



Resource Matching Verity components

See Also

Understanding the Verity Search Index

Factors, Factor Families, and Objective Fit

Resource Matching 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 Resource Matching, 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 time frame?" The Competency Proficiency factor asks the question, "Does the resource have the requested proficiency in the requested competencies?" Resource Matching 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. Resource Matching 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.
Project 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.

Factor	Description
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 time frame 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 Matching 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

Resource Matching identifies resources that 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, Resource Matching 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 Search Configuration - Factor Weights page, you can prioritize the fit scores for search types for individual factors within factor families. You can define different criteria for each search type.

  These priorities specify the factors that are used by Resource Matching 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, Resource Matching 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 Resource Matching, specify *Not at all important.*

Resource Matching Automatic and Batch Processes

The message RS_SCHED_TASK updates the Availability Cache.

Automatic Calculations

When you search for an appropriate resource or resource request in the Staffing Workbench component (RS_MYSERVICEORDERS) or My Assignments component (RS_MYASSIGNMENTS), Resource Matching evaluates each resource's fit to the resource request.

The message RS_SCHED_TASK is published when the calendar is updated. When a resource assignment is created in Resource Management with a status of *Assigned, Pending Approval,* or *Reserved,* the resources calendar is updated which in turn publishes the RS_SCHED_TASK message to update the availability cache.

Different actions can affect availability scores:

- Resource request change.

  When factors and competencies are updated, instead of application messaging updating the scores, the information is written to a log table, then you run the Update Index process to update the factor and competency information. A change to a resource request does not trigger any application messaging for matching.

  If optimization is enabled, however, then a message is triggered; if optimization is not enabled, no messages are triggered. Only factors that are affected by the change are calculated.

- Service order change.

  The system updates the Service Order index (reverse search) when a service order is changed. When the service order changes, the system updates the Optimization Cache.

- Resource schedule change.

  A change to a resource schedule, such as an assignment or appointment date change, triggers the message RS_SCHED_TASK. 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.

  The message RS_SCHED_TASK updates the availability cache table.

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

Batch Process Calculations

The Refresh Resource Schedule Cache process is an Application Engine process that creates an Availability cache table. Schedule the process using PeopleSoft Process Scheduler to run immediately or at a time when system usage is low.

The Availability factor is calculated when you perform a search from the staffing workbench.

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

- During implementation.
- After the Create Resources Application Engine process (RS_CW) is executed.
- After standard hours or standard days change on the Installation Options - Resource Management page.
- After standard hours change on the Job record (JOB).
- After new holidays are added to the holiday schedule and loaded with the Holiday Load Application Engine process (RS_HOLIDAY).

See Also

Enabling Resource Matching and Cache Processes

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, Resource Matching only retrieves resources that are members of the resource group specified for the search.

Features Using Resource Matching

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.
- Express search.
- Determining fit scores on the pool manager workbench (for pool managers that receive generic resource requests instead of service orders).

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 Resource Matching 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 Resource Matching 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 Resource Matching to find open resource requests that are a good fit for you.

Selecting Search Options and Settings

The features that use Resource Matching 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.

Express Search

The Express Search feature finds resources that meet specified qualifications and ranks the search results according to preferences, qualification scores, and availability. Express Search allows 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 from 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.

Determining Fit Scores on the Pool Manager Workbench

Pool managers that receive generic resource requests (instead of service orders) can determine fit scores using the pool manager workbench.

See Chapter 25, “Fulfilling Generic Resource Requests,” page 329.

Resource Matching Fit Score Calculations

Each match factor requires separate algorithms in Resource Matching. 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 Resource Availability cache.
- The fit score.
- Express searching for resources without a service order.

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 Matching 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 Resource Matching.

The system handles accomplishment types in a slightly different manner when searching for a good match between resources and resource requests. This table describes Resource Matching 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.
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: • *100* 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. • *100* 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. • *0* for resources who do not have the requested licenses or degrees, or whose certification is expired by the time the assignment begins. • *0* 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: • *100* for resources who have the requested memberships. • *0* 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 *100* for the accomplishment. **Note.** When determining the fit score for languages, Resource Matching 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 *0* for the accomplishment. resources who have some proficiency in the desired categories, but not to the requested level, receive a score between *0* and *100,* 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 Resource Matching 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 Resource Matching.

Note. If during implementation you select *0 - Not at all important* as the relative importance of the Accomplishment factor in the Resource Matching 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

Resource Matching uses Verity to conduct free-text data searches for the work experience and resume factors. 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 his or her 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.
- Resource Matching 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*.

Resource Matching 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 Resource Matching 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 Resource Matching.

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 Resource Matching, 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 Resource Matching 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. Resource Matching 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.

Resource Matching 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 Resource Matching.

  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 Resource Matching 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, Resource Matching 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.

When using Express Search, the availability calculation uses the number of requested hours per day to determine the resource's true availability. If the resource request is for a time period of less than 8 hours (or less than the defined standard number of hours per day), you can define the number of hours per day. In addition, you can specify multiple date ranges and hours per day.

Here's an example of how availability is calculated if there is an express search for an assignment that lasts 10 days for 4 hours per day, and the standard hours per day is 8:

- If there is a resource in the system that is already assigned to a project for those same 10 days for 4 hours per day, the resource is therefore still available for 4 hours each of those days, and the availability calculation determines that the resource is 100 percent available for the requested 4 hours per day in the search.
- If there is a resource in the system that is already assigned to a project for those same 10 days for *6* hours per day, the resource is still available for 2 hours each of those days, and the availability calculation determines that the resource is 50 percent available for the requested 4 hours per day in the search.
- If there are multiple date ranges involved, the availability score determines an availability percent for each range and then uses a weighted average of the ranges to determine the overall score.

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.
- Hours per day specified 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. Resource Matching 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, Resource Matching 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.

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 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 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, Resource Matching 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.
- *100* for resources that have assignments in the requested date range but that are available for the requested hours per day.
- *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, Resource Matching 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 Resource Availability Cache

The Resource Availability Cache table (RS_DF_WRKR_DATE) is where the system stores precalculated data to calculate the availability scores. Availability scores are calculated at run time using the data stored in the Resource Availability Cache table. These Availability factor fit scores are based on matching a resource to a resource request.

The 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 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, Resource Matching 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 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 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 fit score. The fit score is not cached; it is calculated every time a user performs a search using Resource Matching 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 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 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 fit score calculations.

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, you 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.

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.
- Resource pools.
- The Resource Optimization feature.
- Storage of resource resume attachments.

Understanding Employee Source Data Options

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 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.

This section discusses:

- PeopleSoft HRMS.
- PeopleSoft 7.x HRMS or third-party HRMS.
- PeopleSoft Resource Management without HRMS integration.
- Employee and non-employee source data.

PeopleSoft HRMS

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

When you use PeopleSoft HRMS as your employee source database, selected data that is used to populate 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 77

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 Resource Management. You use PeopleSoft Integration Broker to map your data to Resource Management.

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

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker

Chapter 10, "Understanding EIPs," page 101

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 Resource Management to maintain employee and competency information.

See Also

Chapter 9, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," page 85

Employee and Non-Employee Source Data

In the PeopleSoft Financials Database 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 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 that 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 Financials Database 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 the PeopleSoft Financials database.
- If the PeopleSoft Financials Database 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 recreate your business environment within the PeopleSoft business structure when implementing 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:

- 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 77

Chapter 9, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," page 85

PeopleSoft 8.9 Application Fundamentals for HRMS PeopleBook

PeopleTools PeopleBook: PeopleSoft Application Designer

Business Units, SetIDs, Tablesets, and Record Groups

During implementation planning, familiarize yourself with these 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 allows 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 transaction 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

"Getting Started with PeopleSoft Application Fundamentals"*PeopleSoft 8.9 Application Fundamentals for Financials, Enterprise Service Automation and Supply Chain Management*

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

Project and General Ledger Business Units

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.

Resource Management requires that you establish at least one project business unit, even if you don't use Program Management or 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, 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 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. Resource Matching 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 Resource Pools

Resource pools provide an effective mechanism to organize human resources. They enable organizations to group resources into meaningful and logical groupings. These pools can then be defined in a hierarchy to establish relationships between different pools, enabling analytics, reporting, and capacity information.

In IT and development organizations, individual resources are often grouped together in resource pools for planning purposes. A resource belongs to an organizational unit and a pool. Although resource pools can be identical to HR departments, they can be configured to best suit your organization's needs.

See Also

Chapter 29, "Conducting Capacity Planning," page 387

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! You should 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 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

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 Resource Matching. 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.

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

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. You should 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.

See *PeopleTools PeopleBook: PeopleSoft Server Tools Administration*

CHAPTER 5

Defining PeopleSoft Resource Management Business Units

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

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

Understanding Resource Management Business Units

This section lists prerequisites and discusses:

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

Prerequisites

Complete these tasks before defining 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.

Resource Management Business Units

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

1. Define the Resource Management business unit and assign a project integration template.

   You must assign a project integration template to create projects from Resource Management.

2. Specify Resource Management business unit options.

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

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

In addition, assignments are subject to approval by either a supervisor or a pool manager. If you manage your resources using resource pools, select approval by pool manager and ensure your pools are set up with a pool manager.

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 supervisor.

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 manager (either his or her pool manager or 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 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, 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 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 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 Resource Management business units.

  You must create at least one Resource Management business unit with the same business unit name as a corresponding project business unit.
- Specify Resource Management business unit options.
- Specify Resource Management assignments email notification options.

Prerequisites

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

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

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

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Setting Up Project Business Units"

Pages Used to Define 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	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	Specify the Resource Management business unit options for service order workflow, assignment approval workflow, and email notifications.
Assignments eMail Notification Options	RS_BUS_UNIT_NF_ASG	Click the eMail Notification Options link on the Resource Management Options page.	Specify the Resource Management business unit options for service order workflow, assignment approval workflow, and email notifications.

Creating Resource Management Business Units

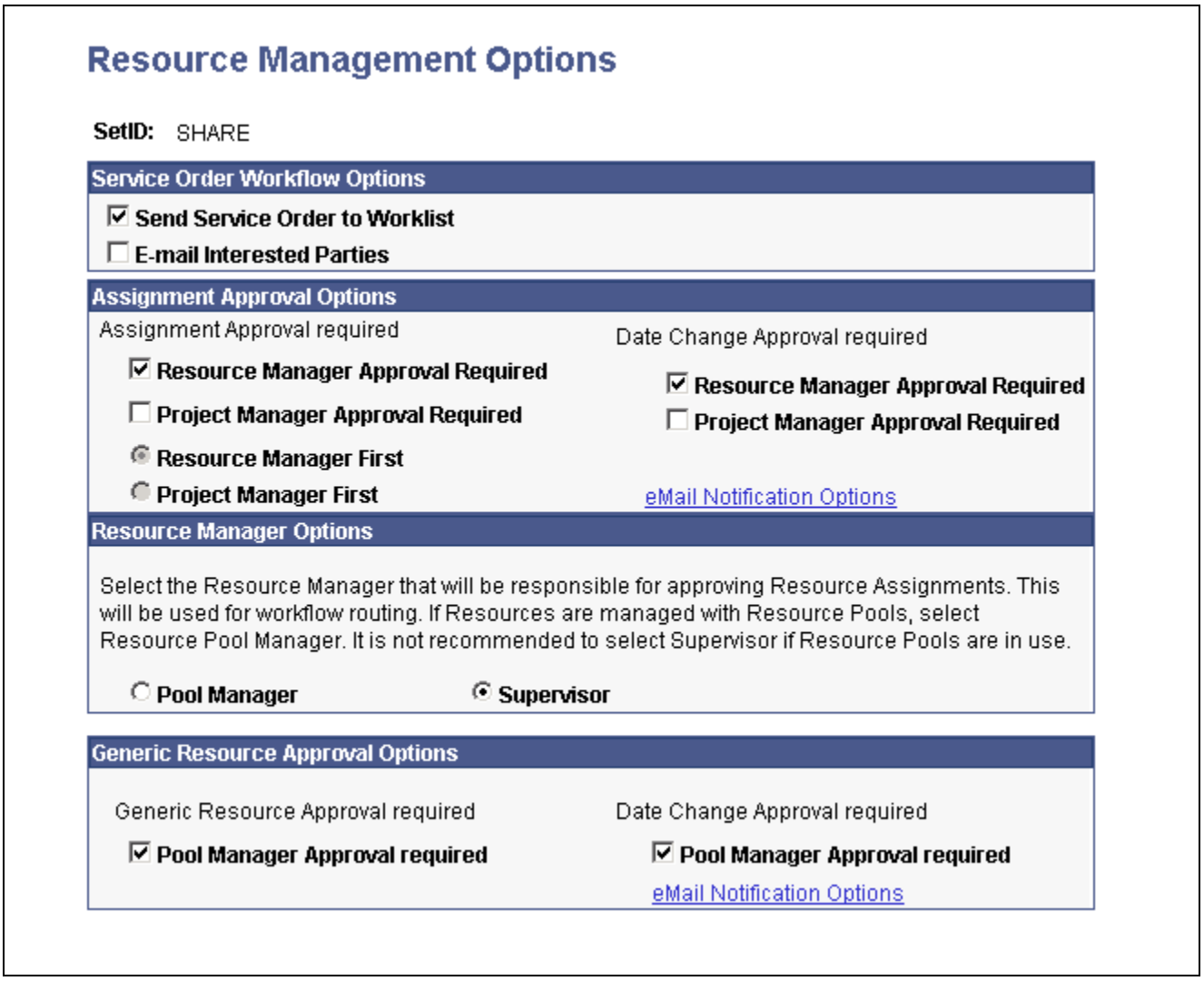
Access the Resource Management Definition page.

Service Order Options

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

Specifying Resource Management Business Unit Options

Access the Resource Management Options page.



Resource Management Options page

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

- Resource Manager Approval Required: Select to require that assignments in the business unit be approved by the resource's manager (his or her pool manager or supervisor), before the assignment status can change to *Assigned.*

  If you select this option, the Resource Manager Options group box appears on the page.

- Project Manager Approval Required: Select to require that assignments in the business unit be approved by the resource's project manager before the assignment status can change to *Assigned.* The project manager is defined on the Project Resources page in Program Management.

  See *PeopleSoft Enterprise Program Management 8.9 PeopleBook*, "Scheduling and Managing Resources".

- Select the order in which the system routes assignment approval:Resource Manager First or Project Manager First.

  The Project Manager Approval Required option will only be available if PeopleSoft Program Management is installed.

Note. If the approver that first receives the approval rejects it, the approval does not get routed second approver. For example, if you designate that both the project manager and the resource manager must approve assignments, and that the project manager is to receive the approval first, and the project manager rejects the assignment, the resource manager will not receive any workflow notification regarding the rejected assignment.

If assignment approval is required, users other than the resource's required approvers 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 assigned approvers. The worklist item is a notification that the assignment needs to be approved.

The resource's manager or project manager can save the resource's assignment with a status of *Assigned.* The system detects that the user is the resource's assigned approver and does not generate a worklist item.

If you designate that both the resource manager and project manager must approve assignments and either of the them creates an assignment, it will remain in a *Pending Approval* status and sent to the worklist of the other assigned approver.

Date Change Approval required

- Resource Manager Approval Required: Select to require that assignment schedule changes be approved by the resource's manager.
- Project Manager Approval Required: Select to require that assignment schedule changes be approved by the resource's project manager.

If date change approval is required, assignment date changes for a resource with the assignment status *Assigned* require approval by the designated resource's approver. A worklist item is routed to the approver. Until the date change is approved by the required approver, 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. If the person making the date change is the approver, then no workflow is generated.

Click the eMail Notification Options link to specify assignments notification options.

Resource Manager Options

This group box only appears if you select the Resource Manager Approval Required check box.

Note. The system uses your selection for workflow routing. If resources are managed with resource pools, select Pool Manager, not Supervisor.

Pool Manager Select to have the pool manager be responsible for approving resource assignments.

Supervisor Select to have the supervisor be responsible for approving resource assignments.

Generic Resource Approval Options

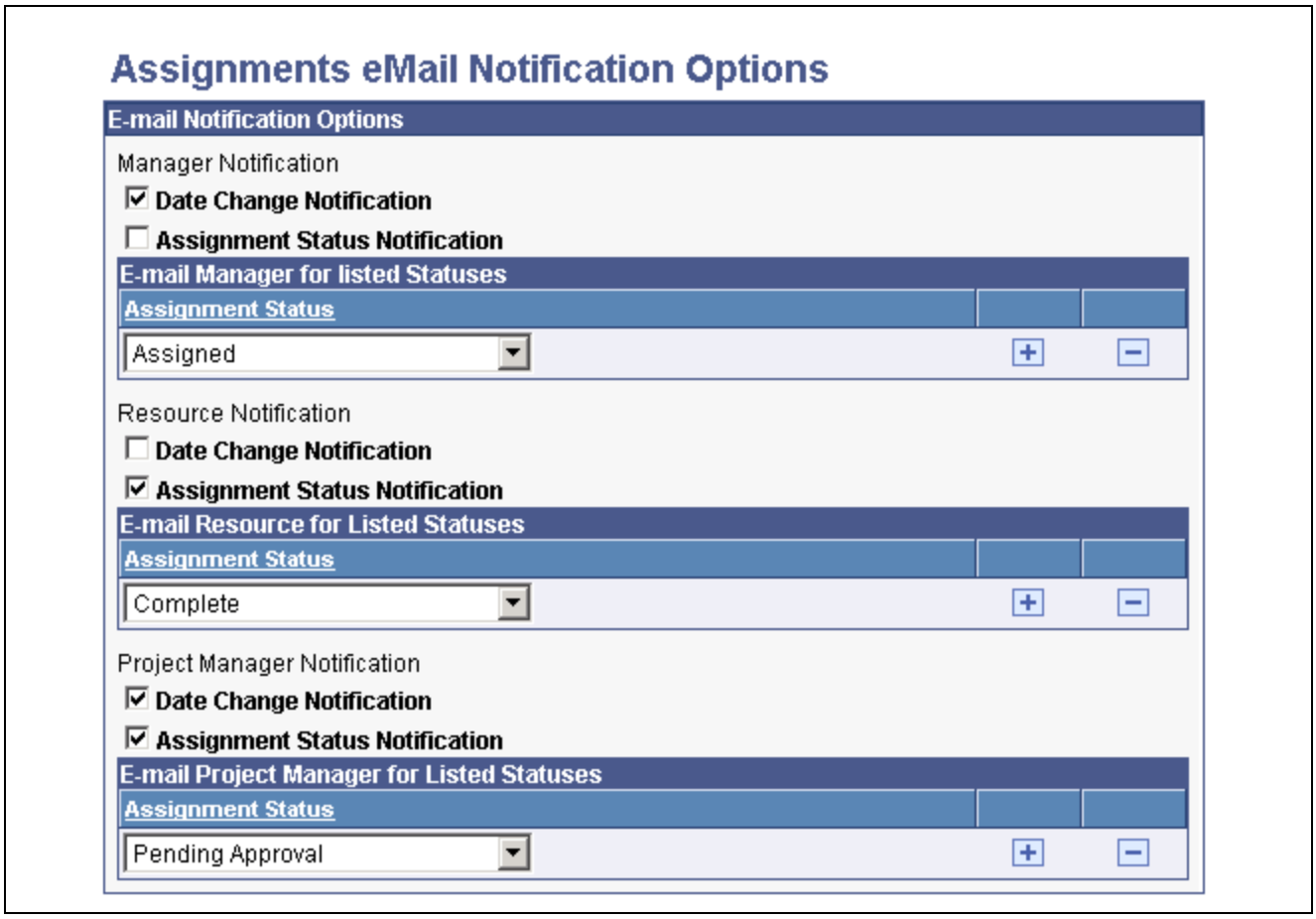
Generic Resource Approval required Select Pool Manager Approval required to require that generic resource requests be approved by the resource's pool manager when the project manager requests a new generic resource from the project resource list. Until such approval occurs, the resource status on the project resource list cannot change to *Allocated.*Until the pool manager approves the generic resource request, the project manager cannot allocate generic resource capacity from that pool.

Date Change Approval required Select Pool Manager Approval required to require that the resource's pool manager approve a date change when the project manager changes the assignment dates in the project resource list, for an allocated generic resource request. Until such approval occurs, the resource status on the project resource list cannot change to *Allocated.*

Note. If a resource pool is inactivated, all pending and all approved (but pending fulfillment) generic resource requests will be cancelled.

Specifying Resource Management Assignments Notification Options

Access the Assignments eMail Notification Options page.



Assignments eMail Notification Options page

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.

E-mail <Manager, 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 Enterprise Project Costing 8.9 PeopleBook, "Setting Up 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 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.

Your resource pool structure can be an exact mirror of how you define the organizational unit structure, or it can be more flexible, enabling you to organize by skill set or by "virtual teams."

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 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.

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 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.

See Also

Chapter 16, "Working with Resource Pools," page 159

Department Organizational Unit Trees

If you use departments as the organizational unit, and if you are using 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 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 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 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 Enterprise Application Fundamentals 8.9 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up 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 field name, unit record, tree name, or employee organization record name as required. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Setting Up Resource Management Installation Options.

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. 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 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 Unit Record	DEPT_TBL
Organization Structure Tree 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 = &DtlDescrRec.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 = &DtlDescrRec.GetField(Field.NAME).value`.

CHAPTER 7

Understanding Access-Related Features of PeopleSoft Resource Management

To provide 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 Enterprise Application Fundamentals 8.9 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 Resource Management.

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 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
EPRS5100	RS Worker	Enables resources to review and bid on open resource requests and to update and manage their own resource profiles.	Resource

Permission List	Description	Purpose	Roles
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
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

Permission List	Description	Purpose	Roles
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.
EPRS9500	RS Capacity Planning with Unapprovals	Enables users to create supply and demand forecasts as well as create, modify, approve, and unapprove consolidated scenario analyses.	Practice Manager

Permission List	Description	Purpose	Roles
EPRS9400	RS Capacity Planning	Enables users to create supply and demand forecasts as well as create, modify, and approve consolidated scenario analyses.	Resource Manager
EPRS9600	Region Utilization Setup	Enables users to set up the utilization values for the regions used in capacity planning.	Practice Manager

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 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 101.

Component Interfaces Used by Resource Management

Certain pages in 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, Resource Management grants all users access to all Resource Management component interfaces. System security is managed by allowing or restricting access to specific Resource Management pages based on user roles.

These are the component interfaces that 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.
RS_ASSIGN_BC	Create and Get Assignment	Creates an assignment using *NEXT* 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_CLEARSESNID	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.

Component Interface	Description	Purpose
RS_SCHEDULE_CI	PeopleSoft Resource Management Schedule	Creates a new appointment using *NEXT* 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 *NEXT* service order ID (autonumbered). The system copies data from the existing service order into the new service order.
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
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_CLEARSESNID	Clear Scope Table	Takes a session ID and clears the Scope table.
RS_SCHEDULE_CI	PeopleSoft Resource Management Schedule	Creates a new appointment using *NEXT* 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, Resource Management grants all users access to the PeopleSoft Resource Management web library.

This is the web library that 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 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 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.

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 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.)

Role	Description
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. In addition, this role also performs capacity planning tasks.
Staffing Coordinator	Fulfills service orders; performs express searches; creates assignments.
Practice Manager	Performs the tasks of a resource manager and staffing coordinator; performs capacity planning tasks.

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 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 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

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

Prerequisites

This section lists prerequisites for integrating with HRMS:

- Install HRMS 8 or later.
- Within Common Definitions - Resources Data - Resource Setup - Common Installation Options 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 HRMS.

- PeopleSoft HCM 8.0+ and Financials Database

  Select this option to maintain employee data records in HRMS, and non-employee data records in HRMS and Financials Databases.

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

If you use PeopleSoft HRMS Competency Management:

- Add resource competency type codes and definitions in HRMS if they are not already defined in the HRMS database.
- Establish resource setup data in HRMS if it is not already defined in the HRMS database.
- Grant users access to the HRMS database to maintain resource setup data.

Note. If you maintain non-employee data in either HRMS or 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 8.9 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 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 HRMS from the resource profile in Resource Management, access to the HRMS database is achieved through the Single Signon feature.

See Also

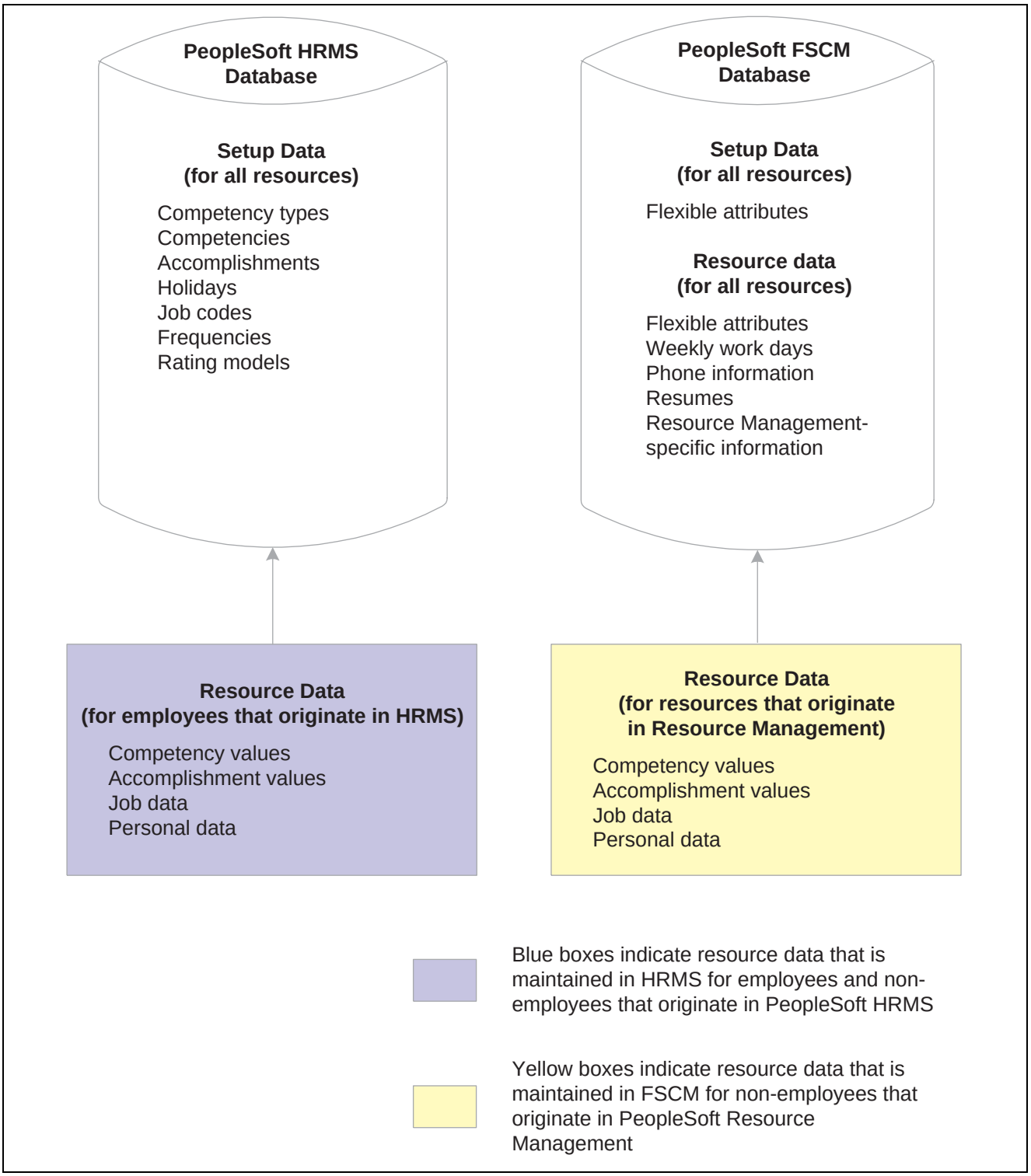
Chapter 19, “Maintaining Resource Profiles,” Resource Profile Design, page 214

Data Synchronization with the Employee Source Database

If you maintain employee and non-employee data in HRMS only, the full synchronization process updates the resource setup data in 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 Resource Management for all resources:

- View and modify resource setup data.

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

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

Note. You must use the 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 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 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 Resource Management implementation, export the Competency tree from the HRMS database using 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 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.

Resource Management users access HRMS pages to update resource setup data. 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 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
	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

Purpose	Typical Users	Menu	Component
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 8.9.
- Activating the Single Signon feature for PeopleSoft HRMS 8.3.

Activating the Single Signon Feature for PeopleSoft HRMS 8.9

These are the basic steps to activate the Single Signon feature if you integrate with PeopleSoft HRMS 8.9:

1. Create the 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 HRMS and one for 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 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 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 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

Select Common Definitions, Resources Data, Resource Setup to access the Common Installation Options page. In the Data Source group box, select *PeopleSoft Financials Database* as the source for employee and non-employee data. This disables the enterprise integration points (EIPs) between PeopleSoft HRMS and Resource Management tables, and it enables the processing rules for 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 Resource Management to manage resources and resource competencies. Resource Management employs EIPs to request and send data between the PeopleSoft Financials and Supply Chain Management (FSCM) database (where Resource Management information resides) and the PeopleSoft HRMS database (where employee and competency information resides).

See Also

PeopleSoft Financials, Enterprise Service Automation and Supply Chain Management Application Fundamentals 8.9 PeopleBook

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 19, "Maintaining Resource Profiles," Resource Profile Design, page 214

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 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 Matching 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 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

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 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 detail 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 do not need to order competency codes in a particular sequence to use the Competency tree. For example, it is not necessary 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. 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). Resource Management uses the Frequency Annualization Factor field value when calculating Availability factor fit scores.

Employee Data Tables

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 Financials Database, any new employee ID (EMPLID) for a non-employee that is created in 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.

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 127

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, Common Definitions, Resources Data, Honors/Awards	Establish the code and definition of honors or awards.
Membership	RS_CM_MEMBR_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Memberships	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, Common Definitions, Resources Data, Languages	Establish the code and definition of languages to be used when matching resources to assignments.
License/Certificate	RS_CM_LIC_CERT_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Licenses/Certifications	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, Common Definitions, Resources Data, Tests	Establish the code and definition of test results.
Degree	RS_CM_DEGREE_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Degrees	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, Common Definitions, Resources Data, Majors	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, Common Definitions, Resources Data, Schools	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, Common Definitions, Resources Data, Competency Types	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, Common Definitions, Resources Data, Rating Models	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, Common Definitions, Resources Data, Competencies	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, Common Definitions, Resources Data, Frequencies	Define a frequency ID, its frequency type (such as annual, monthly, weekly, biweekly, bimonthly, daily, or hourly), and its annualization factor (how many frequency periods occur in one year).
Jobcodes - Job Code Definition	RS_CM_JOBCODE_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Jobcodes	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, Common Definitions, Resources Data, Holidays	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.

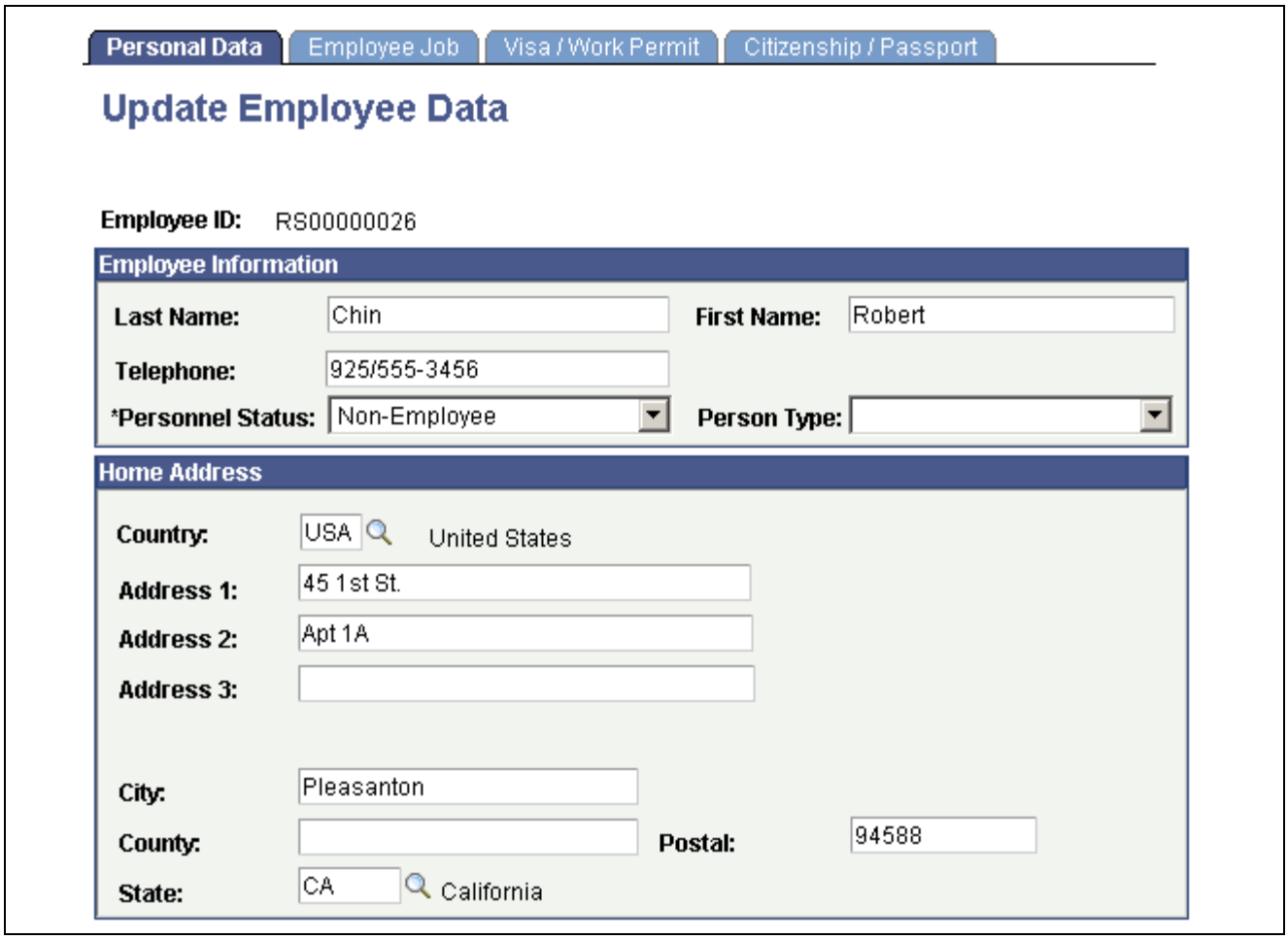
Setting Up Employee Data Tables

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.



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

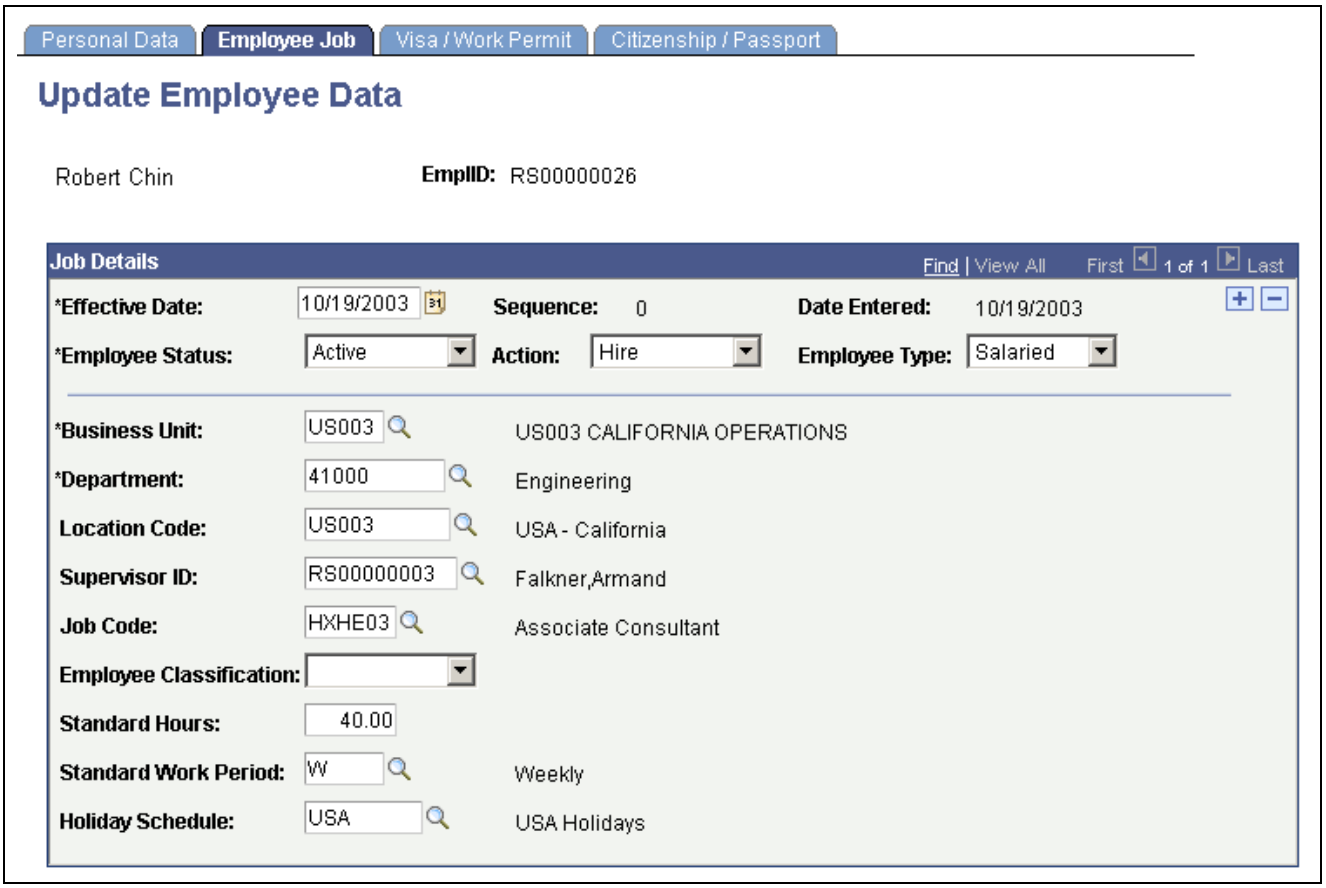
Select a value to further classify a non-employee. This field appears only for records with the personnel status *Non-Employee,* and is used for information only in PeopleSoft Resource Management.

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.



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 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 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 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 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.

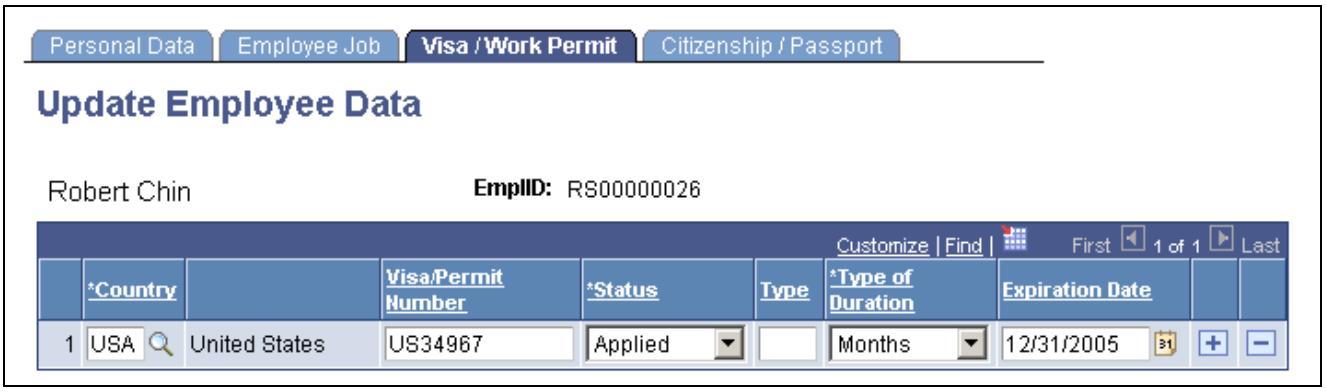
Holiday Schedule Enter the employee's holiday schedule. Available values are based on the Holiday Schedule field (HOLIDAY_SCHEDULE) in the Holiday table (RS_HOLIDAY_TBL).

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 17, "Enabling Resource Matching and Cache Processes," Refreshing Cache Tables and Building the Verity Indexes, page 185.

Visa Permit Information

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



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.

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 for PeopleSoft Enterprise Financial Management Solutions, Enterprise Service Automation, Asset Lifecycle Management, and Supply Chain Management 8.9 PeopleBook

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 8.9 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.

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 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 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 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. Resource Management also uses application messages to trigger the calculation of Availability fit scores by Resource Matching. The application messages that are used by Resource Matching are discussed earlier in this PeopleBook .

See Also

Chapter 3, “Understanding Resource Matching,” page 15

Chapter 17, “Enabling Resource Matching and Cache Processes,” page 175

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 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.

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 Resource Management are discussed earlier in this PeopleBook.

See Chapter 7, "Understanding Access-Related Features of PeopleSoft Resource Management," page 67.

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

See Chapter 14, "Enabling Resource Schedules," page 141.

Application Message Subscriptions that Integrate with PeopleSoft HRMS

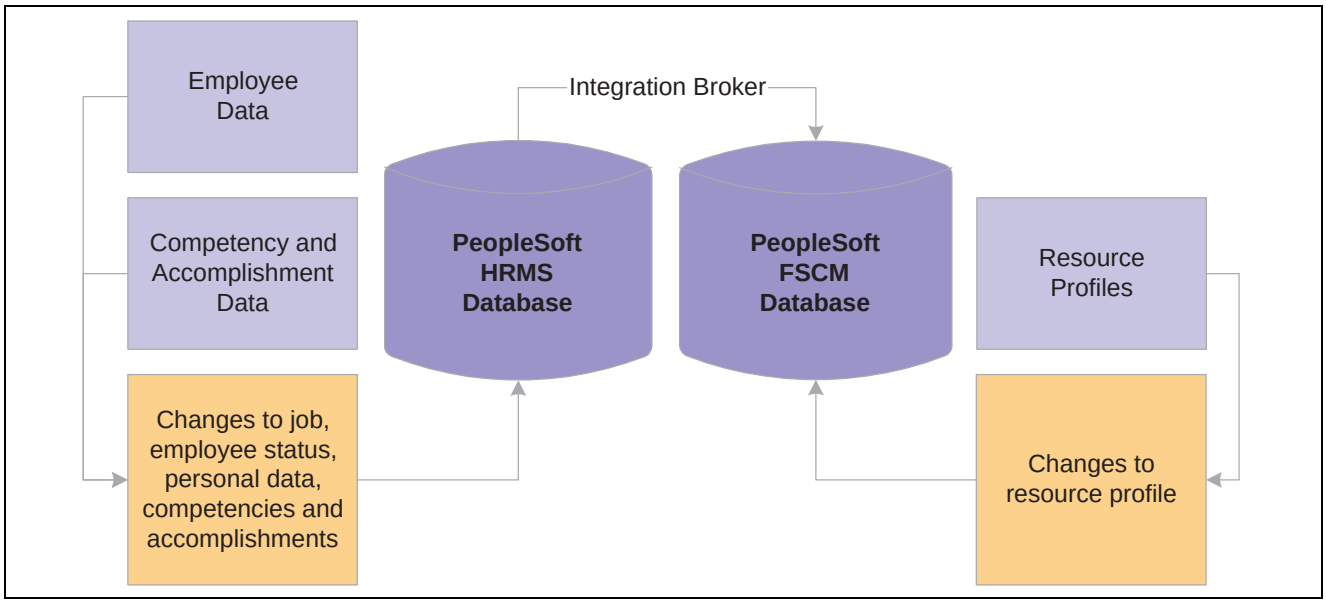
When you use PeopleSoft HRMS as the employee source database, HRMS uses application messages to send selected data to Resource Management data tables, which are used to populate resource profiles. Resource Management depends on the accuracy and timeliness of the information that is stored in the resource 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 Resource Management.
- Incremental synchronization messages.
- Full table synchronization messages.

Shared Data Between HRMS and Resource Management

For the integration between HRMS and Resource Management, HRMS is the publisher of changes to data, and 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 Resource Management and PeopleSoft HRMS application servers.

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

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

Incremental Synchronization Messages

Resource Management utilizes application messages to integrate 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 HRMS with Resource Management, you install two databases, HRMS and 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 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 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 - Resource Management-Specific Synchronization

The following table contains the incremental synchronization messages that update the Resource Management application every time a user changes HRMS data that is relevant to Resource Management. These messages are published from HRMS to 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 HRMS.

Once you activate these messages in HRMS and 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 Resource Management reflects the change within a few seconds.

This table lists the unidirectional incremental synchronization messages that you must activate in the 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
COMPETENCY_SYNC3	COMPETENCY
FREQUENCY_SYNC	PERSON_SETUP
HOLIDAY_DATE_SYNC	PERSON_SETUP
JOBCODE_SYNC	PERSON_SETUP

Message	Message Channel
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 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 HRMS and FSCM databases, the full synchronization process does not update non-employee data for employee IDs that originate in 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 HRMS database. Synchronizing departments by using a FULLSYNC message from HRMS to Resource Management overwrites all of the 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 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 HRMS database, but full synchronization messages copy data from HRMS to Resource Management only. Therefore, any changes that a user makes directly in Resource Management are eliminated when a full synchronization message is published from HRMS and subscribed to by 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 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 FULLSYNC*n,* 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 Resource Management.

Unidirectional, Full Synchronization Messages

This table lists the unidirectional full synchronization messages that you must activate in the 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 Resource Management, the HRMS data does not overwrite the Resource Management data for non-employees that originates in 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

Message	Message Channel
HOLIDAY_DATE_FULLSYNC	PERSON_SETUP
JOBCODE_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
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 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:

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.
Integration with Microsoft Exchange/Outlook	RS_SCHED_ XCALDELETE	Deletes external calendar entries.	Sends a request to delete an external calendar.

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

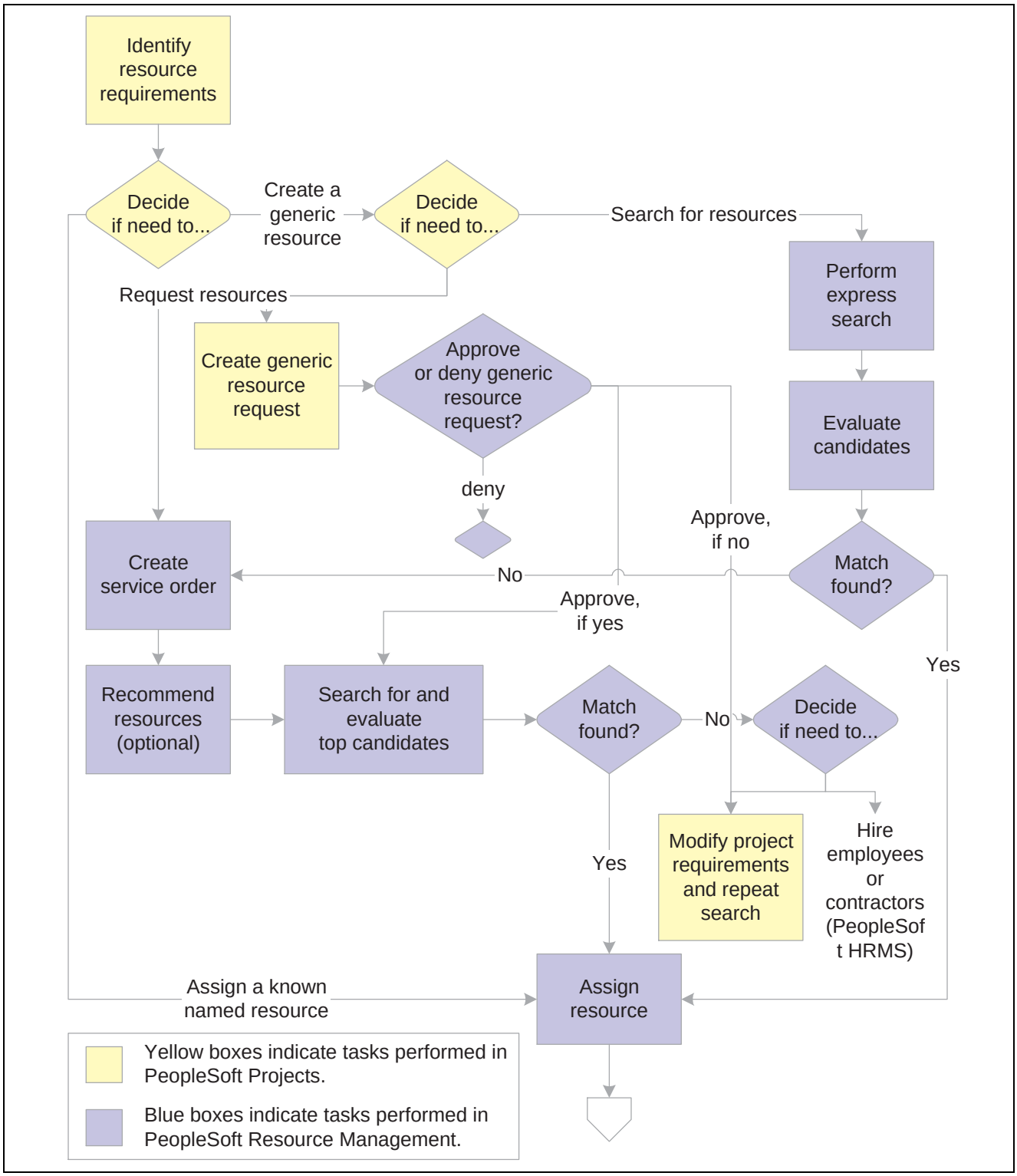
This section discusses integration with PeopleSoft Program Management.

Integration with Program Management

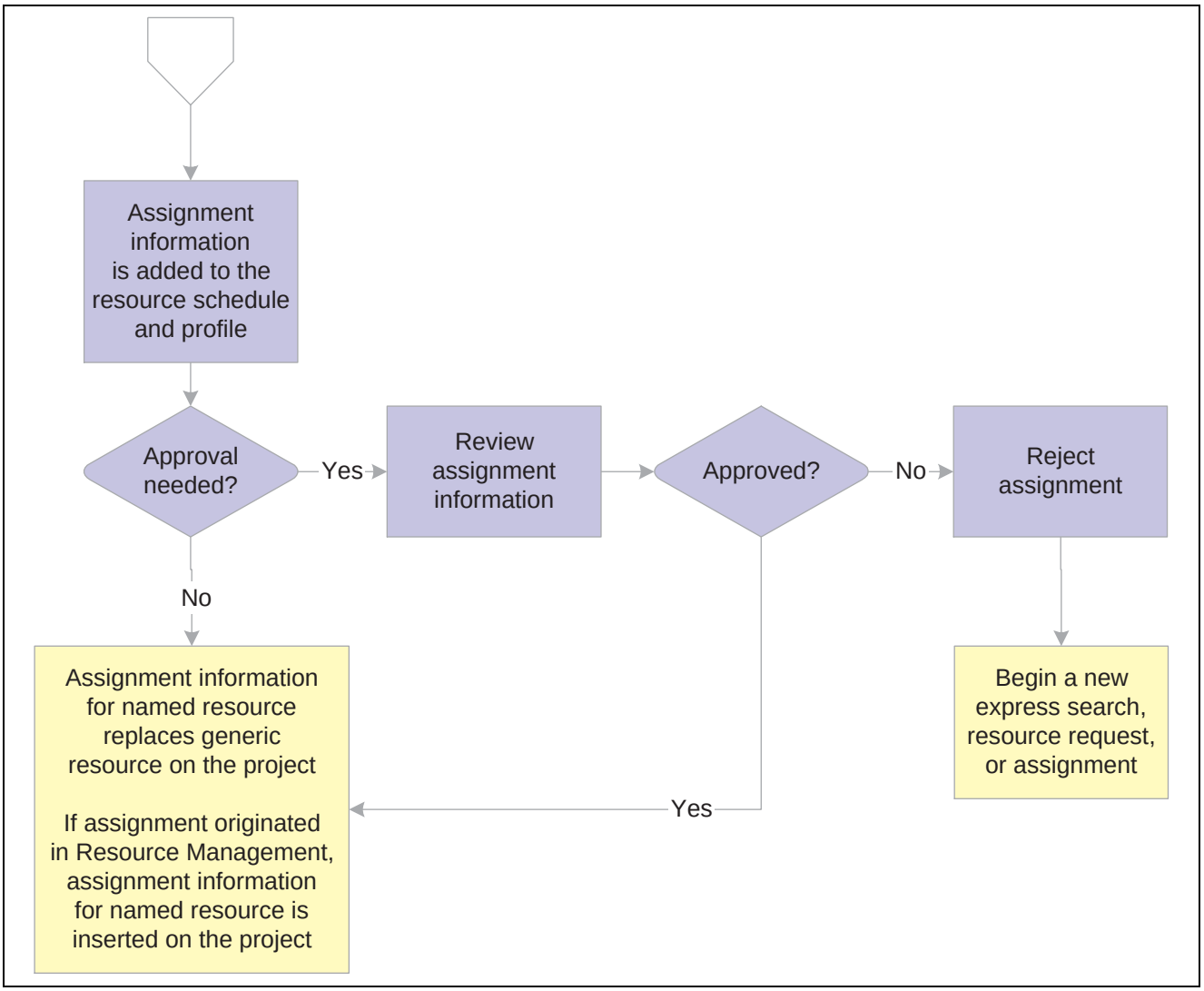
Integrating with Program Management enables you to perform the following tasks from Program Management:

- Use the Resource Management Express Search feature to find labor resources to replace generic resource placeholders on projects.
- Create generic resource requests to hold capacity.
- 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 Generic Resource Request

There are two ways you can request resources in Resource Management: service orders and generic resource requests. You create generic resource requests from the project resource list in PeopleSoft Program Management. A generic resource request comes into the Pool Manager Workbench in PeopleSoft Resource Management with a status of *Pending* or *Allocated* (depending on your Resource Management business unit options), and you can either fulfill it with a named resource, or you can simply allocate capacity.

Create Service Order

You can create service orders to assign named resources to projects on the Manage Generic Resource page in 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 Program Management generic resource are reflected on the 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 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 Resource Management and create a direct assignment from the Project Resource Plan component (PGM_RESOURCE_LIST) in Program Management.
- Create a resource request for a generic resource placeholder and use the Staffing Workbench to find a suitable named resource.
- Create a generic resource request.
- Create a direct assignment in 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 Resource Management to more than one assignment for the same project if the assignment dates overlap. Resources can have more than one assignment for a project if the assignment dates do not conflict.

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

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

Use Express Search

You can access the Express Search page in Resource Management on the Resources page in 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.

View Master Resource Schedule

You can review a chart of the schedules for resources who are assigned to a project from the Resources page in 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 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 Resource Management with the Services Forecasting feature:

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

See Also

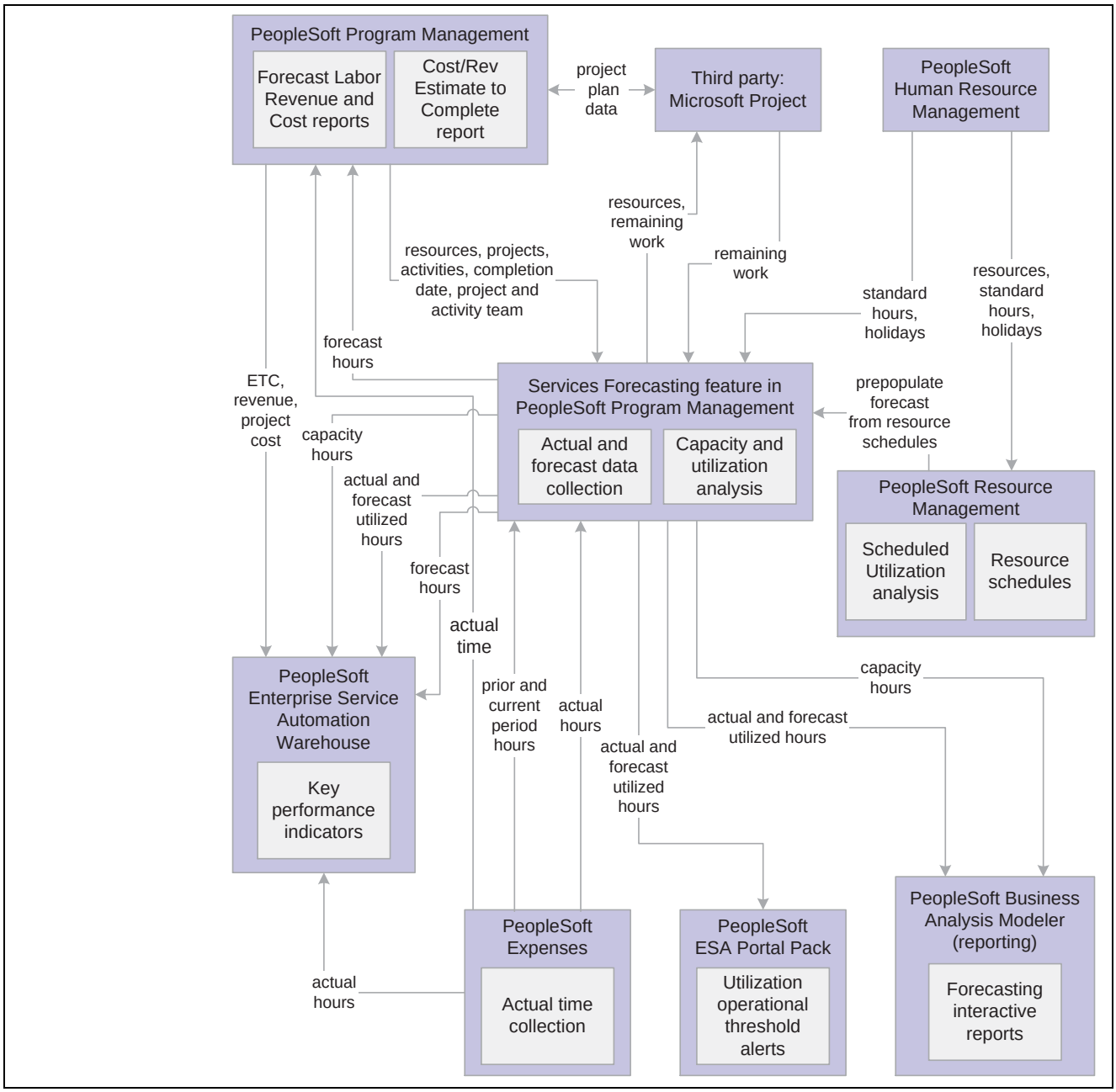
Chapter 14, "Enabling Resource Schedules," Defining Task Categories and Mapping to TRCs, page 143

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.

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, Resource Management, and other PeopleSoft and third-party applications.



Services Forecasting feature integrations

Understanding Integration with PeopleSoft Project Costing

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

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

Understanding Integration with PeopleSoft Proposal Management

Integrating with 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 Program Management. The integration between proposals and service orders is through Program Management if you use that product.

Understanding Integration with PeopleSoft Services Procurement

This section lists prerequisites and discusses integration with Services Procurement.

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

Prerequisites

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

- Enable 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 Resource Management user who—on behalf of him or another user—initiates a service requisition in Services Procurement as a valid requester in Services Procurement.
- Define the Resource Management user, such as the project manager, who requests service requisitions as a valid requester in Services Procurement.
- Define service requisition defaults in 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, before you can select a Services Procurement service provider for an assignment in Resource Management, you must:

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

See Also

Chapter 13, “Establishing Resources,” Establishing and Maintaining Employees and Non-Employees as Resources, page 128

PeopleSoft Enterprise Services Procurement 8.9 PeopleBook, “Setting Up Application Specific Options for PeopleSoft Services Procurement,” Setting Up User Preferences

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up Resource Management Installation Options

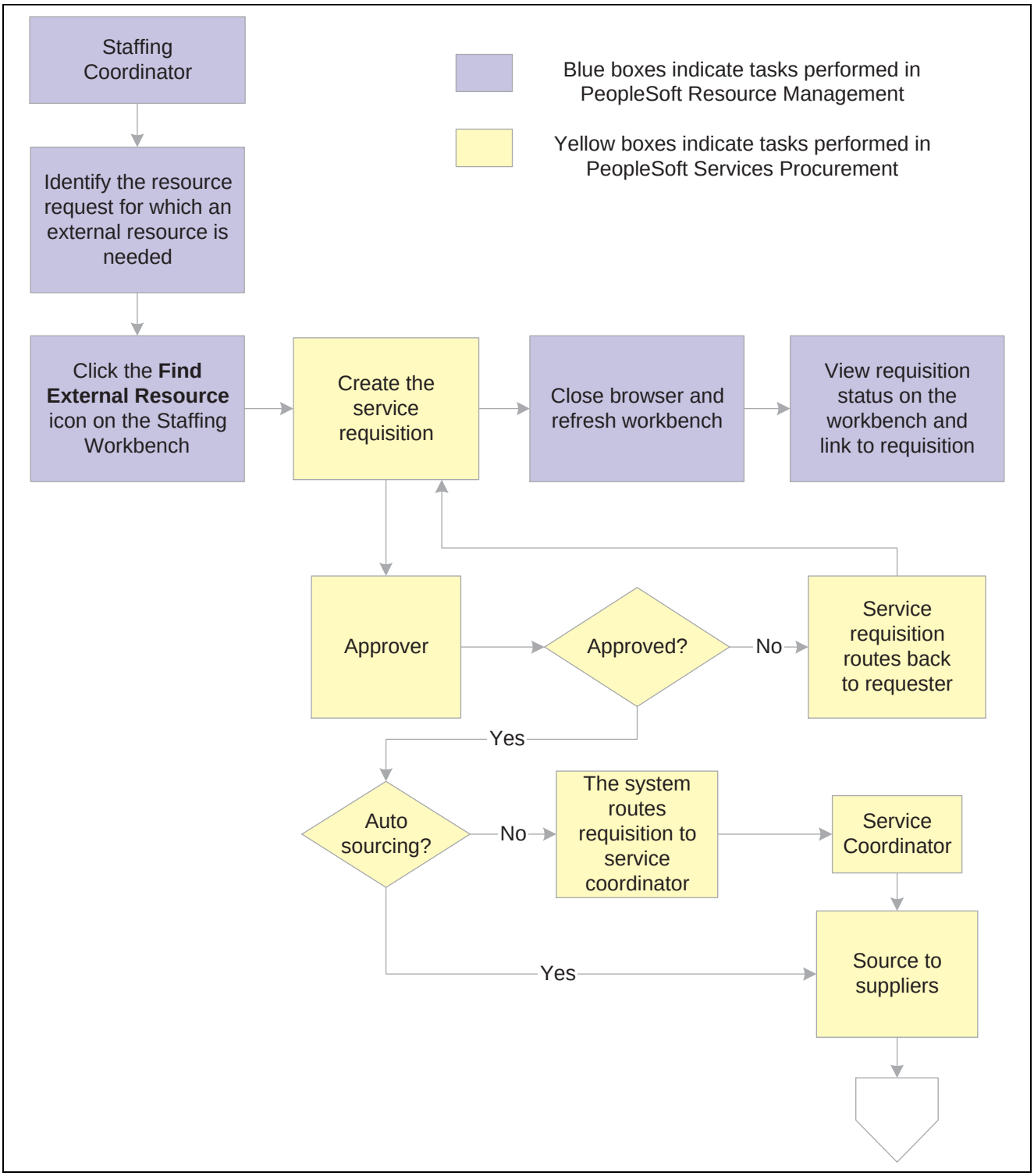
PeopleSoft 8.9 Human Resources PeopleBook: Administer Workforce

Integration with PeopleSoft Services Procurement

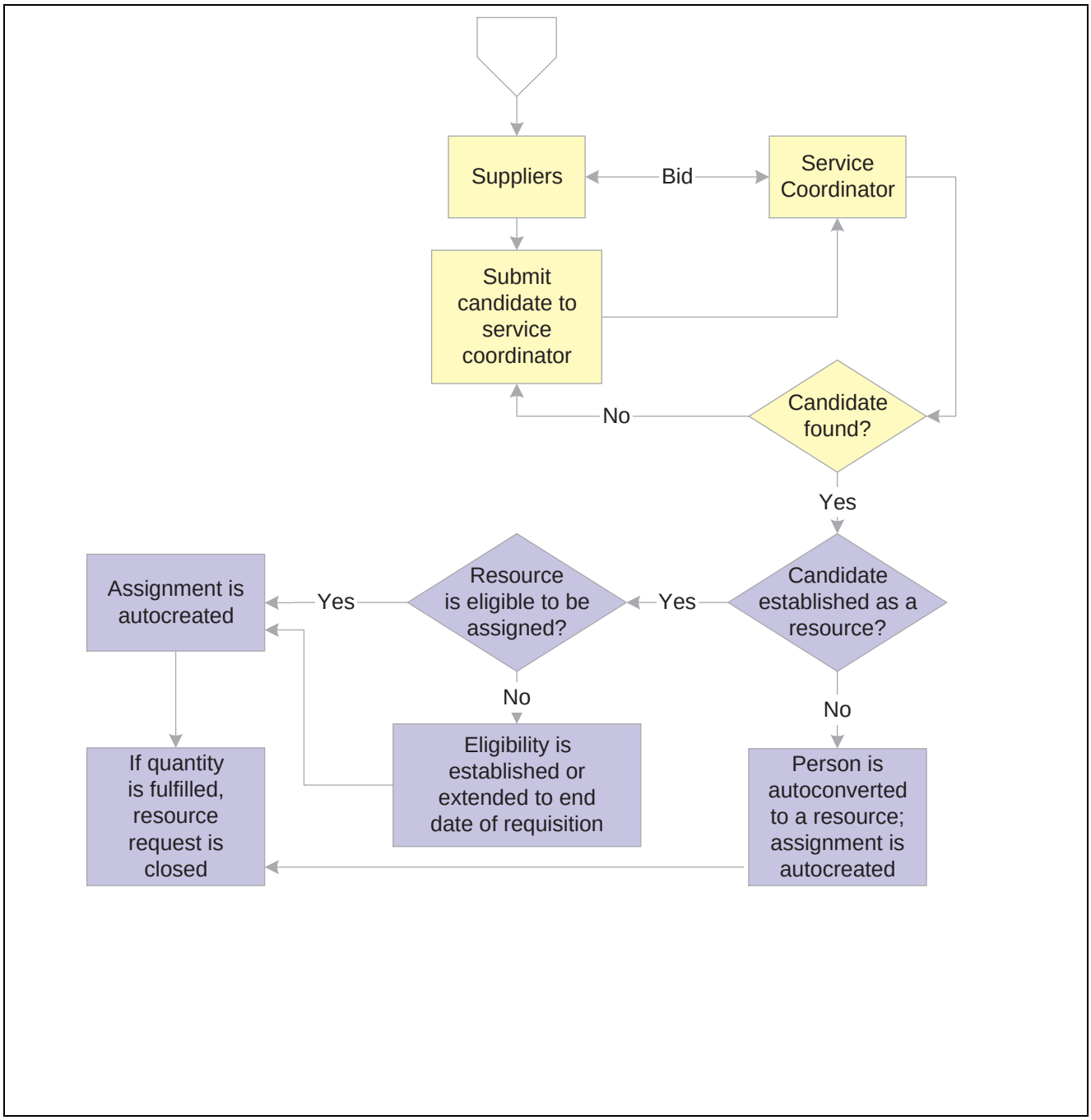
Integration with Services Procurement enables you to:

- Initiate Services Procurement service requisitions from within 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 Services Procurement service requisition to fulfill a resource request if you allow non-employee data to be maintained in 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 Services Procurement who can be selected to fulfill service requisitions in Services Procurement. From the Staffing Workbench - Fulfill Orders page in Resource Management, you can create a 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 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 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 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 Resource Management.

Create Assignment from a Service Requisition

In Services Procurement you can select a candidate to fulfill a service requisition. If the requisition was generated from a 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 Resource Management, you can review the number of external requisitions initiated, filled, or canceled for each resource request. You can also access Services Procurement to edit the requisition or review the approval and sourcing progress.

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 Enterprise Order to Cash Common Information 8.9 PeopleBook, "Maintaining General Customer Information"

PeopleSoft Enterprise Order to Cash Common Information 8.9 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, the PeopleSoft customer database is already available for use by Resource Management. If you do not already use the customer database, 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 Resource Management customer.

See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining General Customer Information".

Customer Profiles

After establishing the PeopleSoft customer database, you can access customer information from various links throughout Resource Management. When you access the customer tables from Resource Management, you work with the Resource Management view of the customer location and contact information through the Customer Information and Contact Profile pages. On the Customer Information page, you can add 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 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 • 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.

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 and in other PeopleSoft products.

Prerequisites

Before you establish employees or non-employees as resources in Resource Management, you must:

- Determine if the organization's business processes allow non-employees to be managed as resources.
- Establish the employee source database.
- Define billing rates by employee or by job.

  See *PeopleSoft Enterprise Project Costing 8.9 PeopleBook*, "Pricing Project Costs," Understanding Pricing Project Costs.
- (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 the PeopleSoft FSCM database. The employee source database contains information about employees and non-employees. 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 resource roles in Resource Management.

When you establish an employee or non-employee as a resource, 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 a resource in 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 Services Procurement and maintain non-employees in Resource Management.
- Automatically convert a Services Procurement service provider to a resource when the service provider is selected for a service requisition that is associated with a Resource Management resource request if you integrate with Services Procurement and maintain non-employees in Resource Management.

Resources in PeopleSoft Staffing Front Office and PeopleSoft Work Order Management

Depending on what products you have installed, you can establish an employee or non-employee as a Resource Management resource, a Staffing Front Office resource, or a Work Order Management resource, or any combination thereof. In order to establish an individual as a Staffing Front Office or a Work Order Management resource, you must navigate to the Create Resources page for the particular product.

If a resource is already established as a Staffing Front Office or Work Order Management resource, and you attempt to establish that resource as a Resource Management resource as well, the system generates a warning to confirm that you want to do so.

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.

Your organization may perform resource or capacity planning at a higher or aggregated level than at the individual level. Being able to aggregate individual resource capacity, demand, allocation, and availability into standard categories gives managers the ability to quickly see resource shortages and excesses. These higher-level aggregations are known as supply categories.

You associate supply categories with resources when you establish those resources. You can update the role and region for a given resource in the Additional Resource Information group box on the Maintain Resource Profile page.

Supply categories are resource attributes:

- Role: An optional field when establishing resources; however, it is strongly recommended that it be associated with resources for effective capacity planning, reporting, and analysis.
- Pool ID: A required field when establishing resources.
- Region: A required field when establishing resources.

Personnel Status is already assigned to employees within the HRMS database and is synchronized with the resource data.

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 and associate supply categories
- 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 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	Select the criteria to generate a list of employees or 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.
Create Resources Program (list)	RS_CW_2	Click the Generate List button on the Create Resources Program page.	Review the employees and non-employees to be established as resources and execute the Create Resources Application Engine process (RS_CW).
Create Resources	RS_WRKR_CREATE	Resource Management, Establish Resources, Create Resources	Enter supply categories and establish an individual employee or non-employee as a resource. Supply the pool ID, region, role, and role setID for the resource while establishing the selected employee or non-employee as a resource. Although Role is not a required field, it is highly recommended for capacity planning. **Note.** 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.
Profiles - Overview	RS_ERES_OVERVW	Resource Management, Maintain Resource Profiles, Profiles	Update role and region for a given resource.
Establish Employee as Resource	RS_WRKR_CREAT_CHNG	Click the Change Job button 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 Resource Management. The list of active jobs for this employee appears on this page.

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

Access the Create Resources Program page.

Note. 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.

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 this 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.

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.

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.

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.

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.

Consider After you select employees for creating resources, click this button to add these employees added to the Considering group box and remove them from the Employees group box.

Considering

This group box displays which employees you have already selected for creating resources.

You can also delete employees from this group box and the system will automatically add them back to the Employees group box.

Generate List Click this button to view a list of the selections. All employees meeting the selection criteria appear in the Resources To Be Established group box to be established as resources when you click the Establish Resource button.

Clear Click this button to clear the check boxes in all group boxes.

Running the Batch Create Resources Program

Access the Create Resources Program (list) page.

Select The system automatically selects all check boxes for employees and non-employees appearing on the list so that they will be created as resources. Clear the check box of any employee and non-employee that you do not want to create as assignable resources.

Role Enter a project role for the resource.

Note. Entering a role is optional, but if you enter a role for all resources, it enhances your Capacity Planning functionality.

Pool ID Enter a resource pool ID for the resource.

Note. Resource pool must be specified when establishing resources.

Region Enter a region code for the resource.

Note. Region must be specified when establishing resources.

Establish Resources Click this button to run the Create Resources process to convert the list of selected employees and 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.

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

Cancel Clears the list and returns 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 Resource Management.

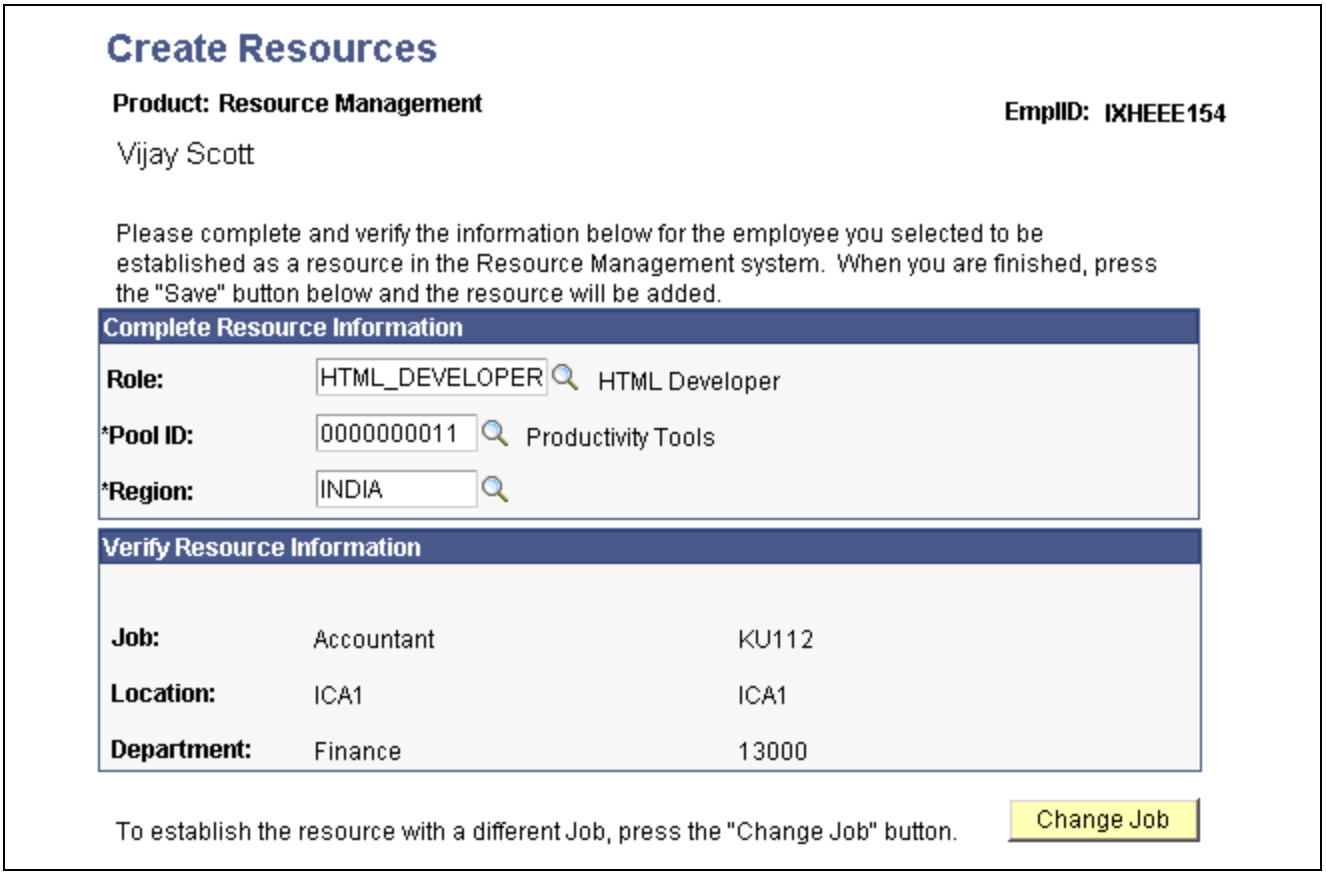
See Also

Chapter 17, "Enabling Resource Matching and Cache Processes," Administering Cache and Maintenance Processes, page 187

Chapter 29, "Conducting Capacity Planning," Understanding Capacity Planning, page 387

Establishing an Employee or Non-Employee as a Resource and Associating Supply Categories

Access the Create Resources page.



Create Resources page

Note. A resource can be established as a Resource Management resource, a Staffing Front Office resource, and a Work Order Management resource depending on which products you have installed.

Complete Resource Information

These fields comprise supply category information.

Role Enter the project role for this resource.

Note. Entering a role is optional, but doing so for all resources will enhance your capacity planning functionality.

Pool Enter the resource pool ID in which you want to place this resource. The default pool is *Unassigned Pool.*

Note. Resource pool must be specified when establishing resources.

Region Enter the region code for this resource.

Note. Region must be specified when establishing resources.

Verify Resource Information

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, access the employee source database to make corrections.

Save Click to establish the employee as a resource with the values displaying on the page.

Change Job If you integrate with PeopleSoft HRMS and use the multijob feature, click this button to establish the resource with a different job.

Selecting One Job for a Resource

Access the Establish Employee as Resource page.

Select Click the Select button adjacent to the appropriate job to associate with this resource in 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 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 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 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 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.

If you are implementing Services Procurement, supply categories populate by default. Resources that you establish will automatically default with an *Unassigned Resources Pool* value. The Role field is blank; personnel status is *Non-Employee.*

Note. After you create resources, it is important to update the resource profile with the region this Services Procurement resource will be part of.

The system uses the following logic to establish the service provider as a resource:

- If non-employees are maintained in Resource Management and the person ID is not associated with an employee value (EMPLID) in 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 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 Resource Management with Services Procurement, two employee records may exist for the same person. This can occur if a Services Procurement person ID (PERSON_ID) and a HRMS employee record exist for the same person, and the system automatically establishes the person ID as a non-employee resource in Resource Management.

See Also

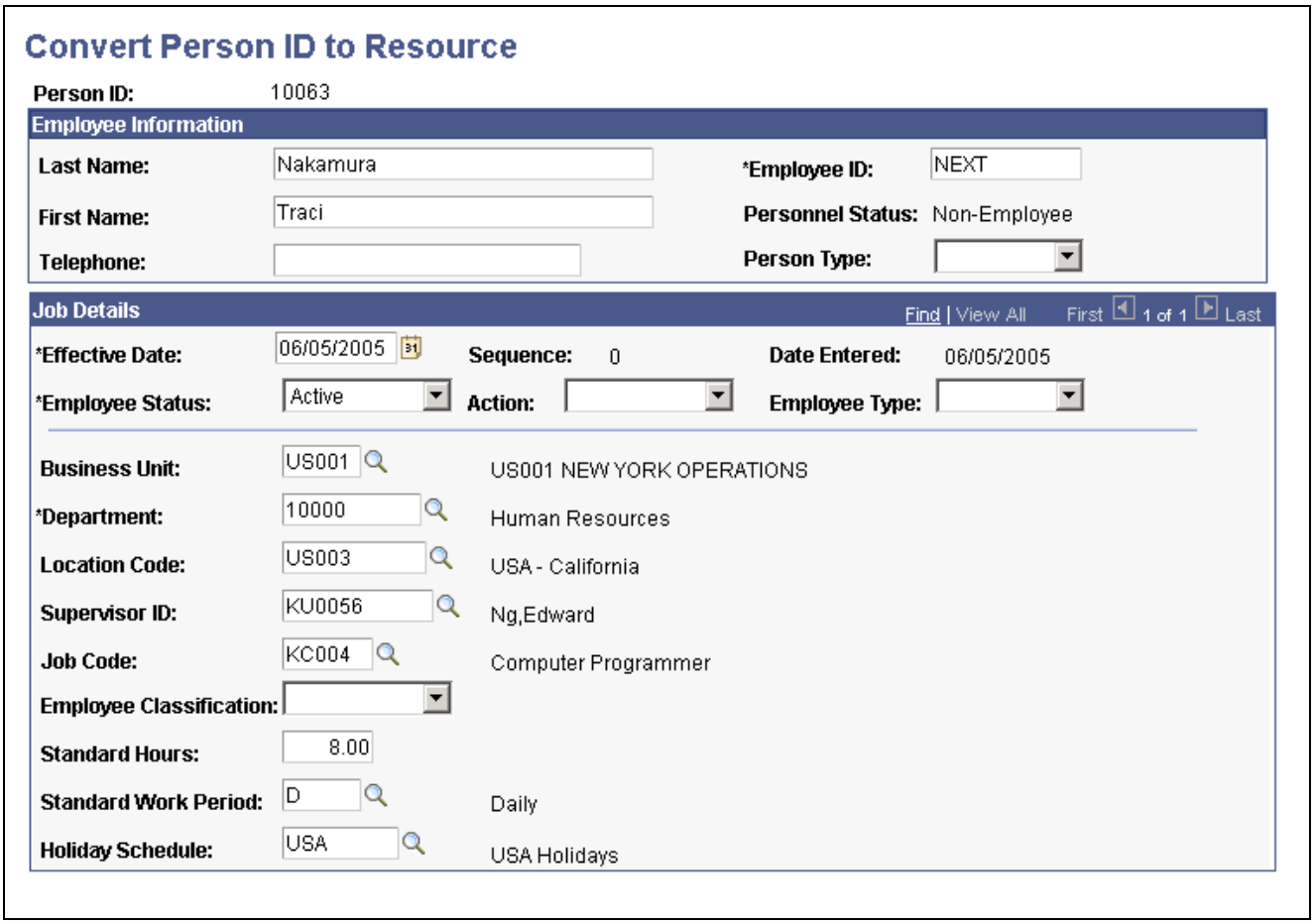
Chapter 11, "Integrating PeopleSoft Resource Management with Other Applications," Understanding Integration with PeopleSoft Services Procurement, page 117

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	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 a Services Procurement person ID to an employee record in 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.



Convert Person ID to Resource page

Enter Employee Information and Job Details for the person ID.

The Personnel Status value *Non-Employee* is not editable. You specified the following default values on the on the Resource Management Installation page:

- Business Unit
- Department
- Location Code
- Supervisor ID
- Job Code
- Standard Hours
- Standard Work Period
- Holiday Schedule

See Also

Chapter 9, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Setting Up Employee Data Tables, page 95

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up 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 this button to proceed 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	Review or change the resource's eligibility.
Resource Eligibility Management	RS_WRKR_MGMT_FUT	Click the Change or Add Eligibility button 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	View the current job that is associated with the resource.
Change Job	RS_WRKR_NEW_JOB	Click the Change Job button 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.

Resource eligible to be staffed? Select *Yes* or *No* to indicate whether the resource is eligible for assignments and resource matching in Resource Management.

You cannot select *Yes* if the Employee Status value 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 this button to access the Resource Eligibility Management page to manage future eligibility.

Adding Resources' Future Eligibility

Access the 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 Click this button to add 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 Resource Matching. 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.

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 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 this button to select a different job to associate with the resource in Resource Management.

Selecting Resources' Current or Future Jobs

Access the 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 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.

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 that you establish as a resource in the PeopleSoft FSCM database. 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.

Task Categories

In PeopleSoft Financials, 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 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 within PeopleSoft are not the same as tasks that appear on a task pad or to-do list, such as those offered by Microsoft Outlook 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
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.

Time Reporting Codes

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 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 Enterprise Program Management 8.9 PeopleBook, "Setting Up Services Forecasting"

Holidays

Holidays that are observed in the workplace impact availability, and holiday schedules can differ from country to country. In PeopleSoft Financials, 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 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 Resource Management, Resource Matching 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.

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.

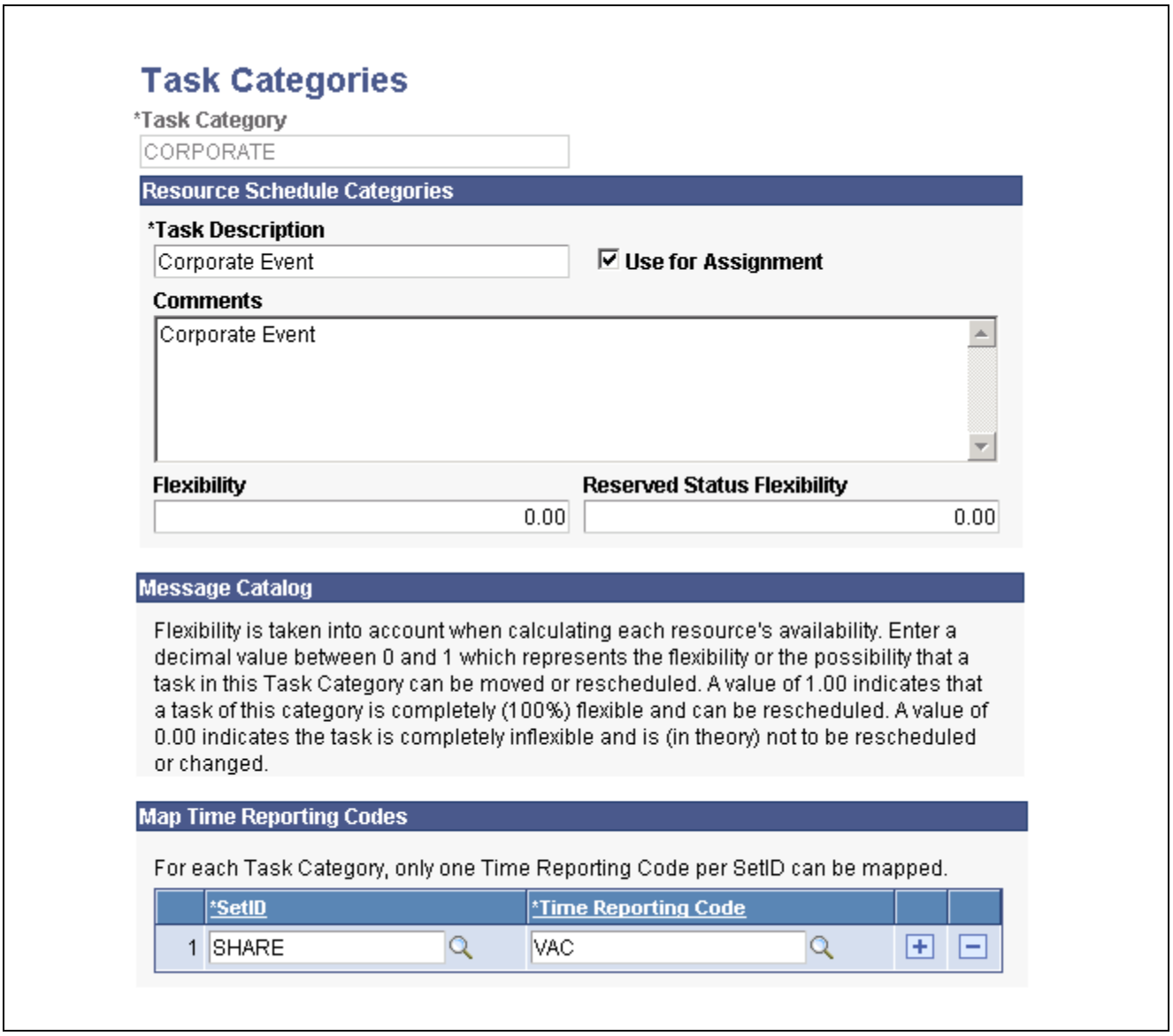
Page Used to Define Task Categories and Map to TRCs

Page Name	Object Name	Navigation	Usage
Task Categories	RS_TASK_TYPE	Set Up Financials/Supply Chain, Product Related, Resource Management, Calendar, Setup Task Categories	Create or update task categories, map task categories to TRCs, view and modify the values for delivered task categories. Rename and modify user-defined task categories or the delivered PeopleSoft *OTHER* and *OTHER2* task categories.

Creating or Updating Task Categories and Mapping to TRCs

Access the Task Categories page.

Note. You can map task categories to TRCs if you use the PeopleSoft Services Forecasting feature that is available with PeopleSoft Program Management.



Task Categories page

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 this check box to make the task category available for assignments; clear it 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 *Assigned* or *Pending Approval* 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 *Reserved.* The higher the value,

the more flexible the task. This field is available when you select the Use for Assignment check box.

Note. This field only displays if the Use for Assignment check box is selected. If you select this check box, you must then save the page in order for the Reserved Status Flexibility field to display.

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 Enterprise Program Management 8.9 PeopleBook, "Setting Up Services Forecasting," 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, Common Definitions, Resources Data, 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 the holiday schedule 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 Enterprise Application Fundamentals 8.9 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up Resource Management Installation Options

Updating Holidays on Individual Resource Schedules

Access the Monthly Schedule page.

Click theUpdate Employee's Holidays button to run the Holiday Load process and update the holidays on this individual's resource schedule.

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 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 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 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	Establish or modify service order priorities.

Establishing or Modifying Service Order Priorities

Access the Service Order Priority page and enter a unique priority code.

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 to 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 59.

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 • Set Up Financials/Supply Chain, Product Related, Resource Management, Service Order Defaults	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 the Select an Organization lookup button on the Service Order Defaults for <user> page. Click the Advanced Search or the Basic Search link.	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.

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 lookup icon.

See Chapter 23, "Requesting Resources Using Service Orders," Defining Owning Organizations, page 297.

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 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 • Resource Management, Define Templates, My Qualification Profiles	Create or modify qualification profiles for other users (if you are an administrator) or for yourself.
Competencies	RS_RESRC_TMPL_COMP	Click the Add Competency button 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.

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 this check box 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 business unit with access to the setID.

Defining Role Competencies

This group box displays if you use PeopleSoft HRMS as the only employee source database.

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 this button 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

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+ Years*.

Importance Enter *Desired* or *Required* 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 19, “Maintaining Resource Profiles,” Modifying Resource Competencies and Interests, page 228.

Defining Profile Accomplishments

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.
Delete	Click a button 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 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	Store common resource request details that you can use to populate new service orders.
Service Order Template - Order Summary	RS_SO_TMPLT_SUM	Resource Management, Define Templates, Service Order Template, Order Summary	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 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.

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.

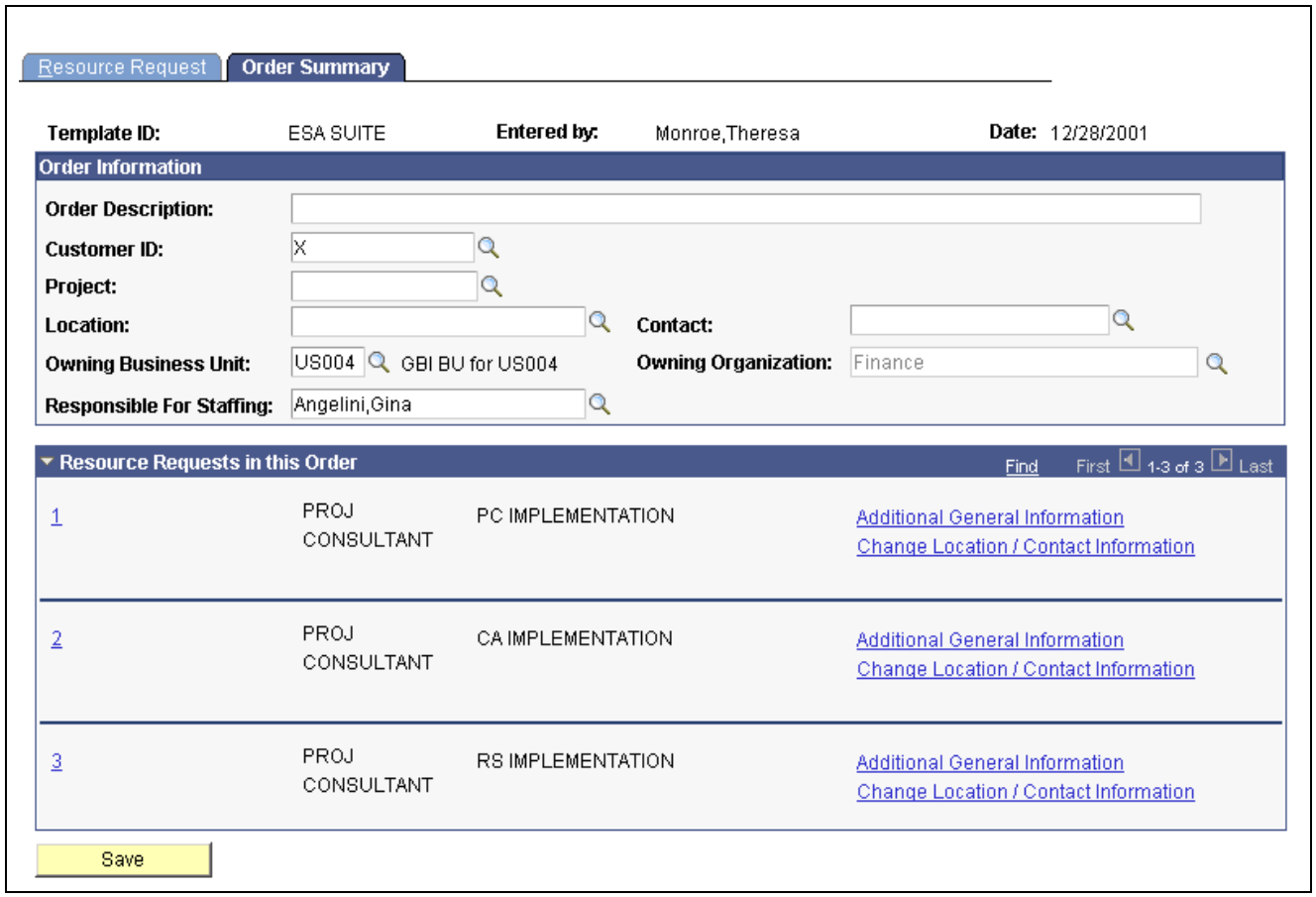
Customer ID (Optional) Enter a customer ID.

Resource Request (Optional) Enter information in any resource request field that commonly appears in recurring service orders.

See Chapter 23, "Requesting Resources Using Service Orders," Defining Resource Requests, page 292.

Defining the Order Summary Template

Access the Service Order Template - Order Summary page.



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 lookup icon.

See Chapter 23, "Requesting Resources Using Service Orders," Entering Order Summary Information, page 295.

Additional General Information Click this link to enter additional attribute values for an individual resource request line.

See Chapter 23, "Requesting Resources Using Service Orders," Adding Additional Resource Request Information, page 301.

Change Location / Contact Information Click this link to specify a different location or contact for an individual resource request line.

See Chapter 23, "Requesting Resources Using Service Orders," Changing Locations or Contacts, page 302.

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 the Delete check box 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. Resource Management users share service order templates; therefore, only system administrators should have permission to delete the templates.

CHAPTER 16

Working with Resource Pools

This section provides an overview of resource pools and discusses how to:

- Set up resource pools.
- Manage pool resources.
- Load resource pool information in batch.

Understanding Resource Pools

Organizations can have hundreds to thousands of resources that make up the supply side of the Capacity Planning model. Resource pools provide a mechanism to organize supply in a meaningful way to support Capacity Planning. You can group resources in any configuration you need in order to support your operations.

Resource pools are defined in a hierarchy to establish relationships between different resource pools and allow for roll-up analytics and reporting. You can model the resource pool structure to your organizational structure (using HR departments, for example). However, the way you categorize and manage your resources from a capacity standpoint may vary greatly from your organizational structure. Pools may go down to a lower level of granularity or be grouped in a different way to provide the desired analysis and reporting necessary for effective decision making.

In addition, pools can contain generic resources as placeholders for future capacity. This future capacity could represent a known increase in headcount due to hiring more employee resources or obtaining contractors to fulfill future demand. At some point, the pool manager replaces each generic resource with a named resource.

Pools are rarely static because new pools are added and others are inactivated. Pool managers can change, pool hierarchy can be reorganized, and resources can be transferred between pools.

Resource pools can be used to filter resources during Express Search and in the Staffing Workbench. Resource pools can also be used for approval workflow routing, where pool managers act as the resource manager and control the use of the resources in their pool. Pool selection is a part of resource group creation. During initial implementation or reorganization of resource pools, an administrator creates pools and then associates them in the pool hierarchy.

Typically, there are two *functional roles* associated with resource pools: Pool Administrator and Pool Manager. The following table details each role's tasks within the process:

Role	Responsibility
Pool Administrator	Manages the overall pool hierarchy, has access to all resource pools, and manages reorganizations. Responsibilities include: • Creation of pool and pool hierarchy upon implementation and reorganizations, which can occur frequently. • Assignment or reassignment of pool managers. • Transfer of resources between pools. • Modification of resource data in pools (start dates, end dates, capacity percent, and so on). • Inactivation of pools, moving of pools within the hierarchy, or overwriting the entire pool hierarchy.
Pool Manager	Owns and manages the resource pools and the resources within their pools. Responsibilities include: • Transferring of resources between pools. • Modifying resource data within resource pools.

Use the Pool Administrators component (RS_POOL_ADM) to add pool administrators. Use the Create Resource Pools component (RS_RES_POOL) to create and modify resource pools.

Setting Up Resource Pools

This section discusses how to:

- Define resource pool roles.
- Create resource pools.
- Establish the pool hierarchy.

Pages Used to Set Up Resource Pools

Page Name	Object Name	Navigation	Usage
Set Up Pool Administrators	RS_POOL_ADM	Setup Financials/Supply Chain, Product Related, Resource Management, Resource Pools, Set up Pool Administrators	Define resource pool administrators.
Resource Pool	RS_RES_POOL	Setup Financials/Supply Chain, Product Related, Resource Management, Resource Pools, Create Resource Pools	Add or update resource pools.
Pool Hierarchy	RS_POOL_HRCHY	Resource Management, Manage Resource Pools, Resource Pool Hierarchy	Establish the resource pool hierarchy.

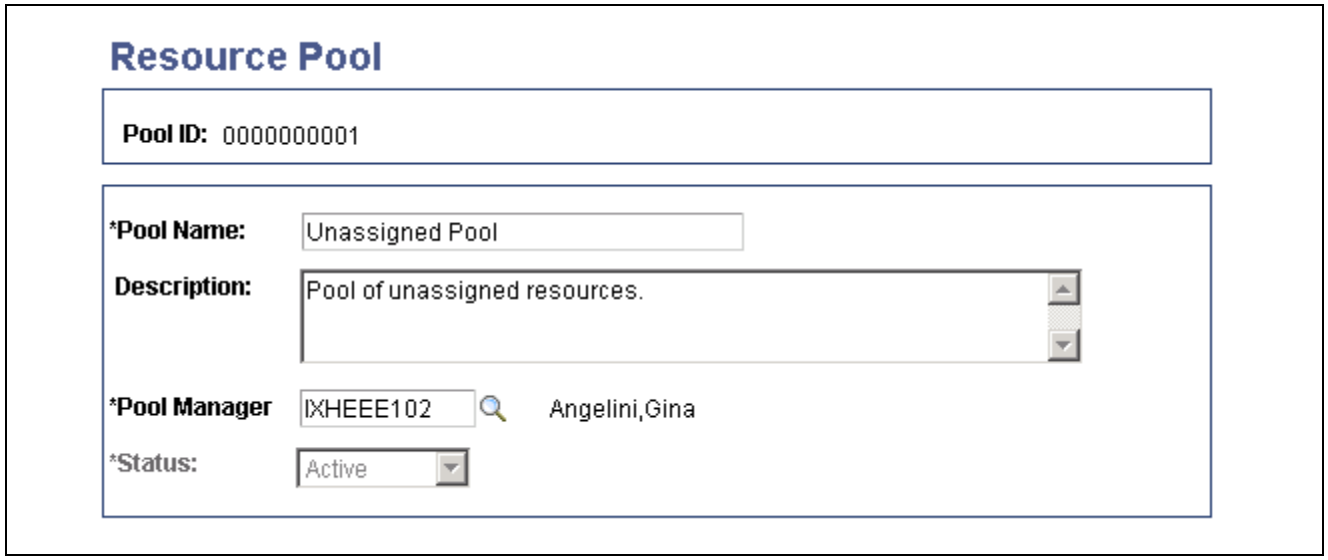
Defining Resource Pool Roles

Access the Set Up Pool Administrators page.

Pool Administrator ID Add at least one pool administrator during implementation in order to create pools and the pool hierarchy. The selection list for this ID can be any OPRID in the system. There is no limit to the number of pool administrators you can define, although we recommend that you limit your administrators to three or fewer.

Creating Resource Pools

Access the Resource Pool page.



Resource Pool page

Pool ID When adding a pool, this key field is determined by the system sequentially.

Pool Name Enter a name for the pool. You can change the name later.

Description Supply a description for the pool.

Pool Manager Assign a manager for the pool. Pool managers can be any employee in the system and can receive workflow to approve assignments or allocations for resources in their respective pools.

Status Select *Active* or *Inactive.* Pool managers can change the status on their own pools and any pools that are child pools. Inactive pools can be changed back to an active status at any time. Only active pools display in the pool hierarchy.

Pool Resources Click this link to view and update the resources of the selected pool.

Pool Hierarchy Click this link to establish the pool organization and relationships.

The Unassigned Resources Pool

Resource pool is a supply category that enables you to segregate supply capacity. Because it is a required field and there must always be an active pool in the system, we deliver an *Unassigned Pool.* The Pool ID for this delivered pool is *0000000001.* The system uses the *Unassigned Pool* as the default pool when creating a Resource Management resource.

You can modify the Pool Name, Description, and Pool Manager to make this pool more meaningful to your organization.

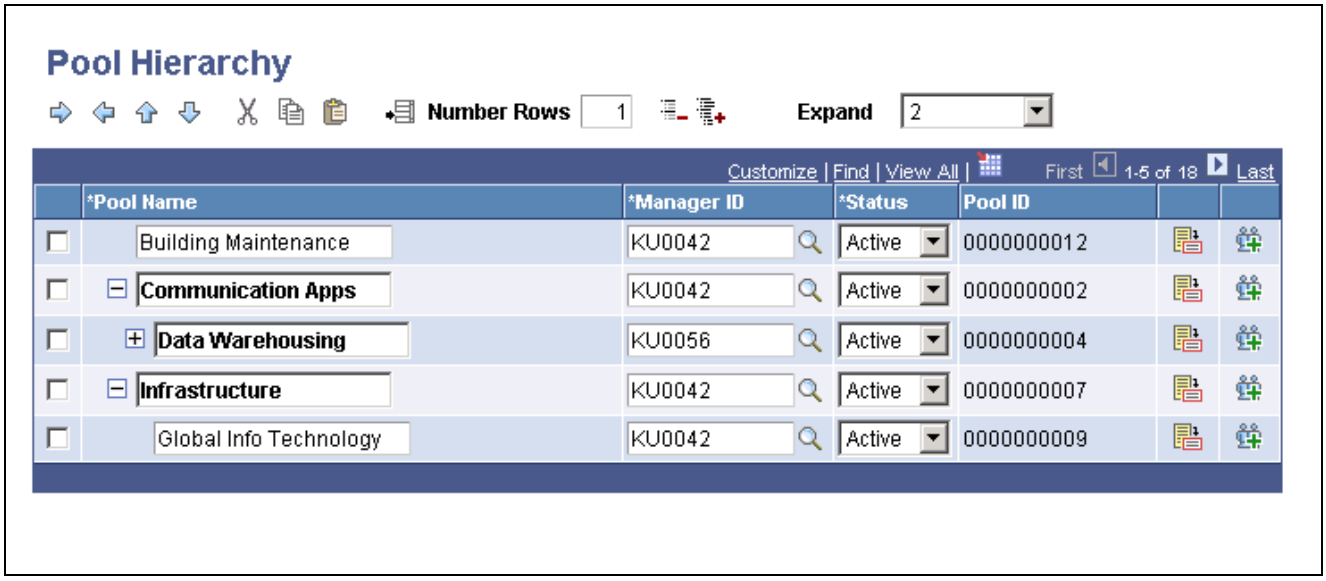
The following are important guidelines for the *Unassigned Pool:*

- It must always be at the most outdented level (level 1) of the pool hierarchy.
- You can add child pools to it.
- You cannot modify the Status field because it must remain active in order to support the default pool functionality.

Note. When first implementing Resource Management, after establishing pool administrators, immediately assign a pool manager to the *Unassigned Pool.*

Establishing the Resource Pool Hierarchy

Access the Pool Hierarchy page.



Pool Hierarchy page

(check box) Select the check box in the first column of the group box to identify the row to be updated. You can then perform the following actions on the selected row:

- Indent: Click the right arrow (Indent) to indent a row. This action makes the previous row a parent pool. Indenting is not allowed on the first pool in the list and no row may be indented more than 1 level from its parent. Indenting a summary pool also indents all of its children.
- Outdent: Click the left arrow (Outdent) to outdent a row, which moves the selected row down one level. Outdenting is not allowed on any row that is at the most outdented level. Outdenting a summary pool also outdents all of its

children. Outdenting a row with siblings makes the selected row the parent of its siblings; the selected pool becomes a parent pool.

- Move Up: Click the Move Up arrow to move a row above the previous row. If the selected row is a parent pool, all of its children will also move up. The moved row inherits the more indented hierarchy level of the row above and below the moved row.
- Move Down: Click the Move Down arrow to move a row below the following row. If the selected row is a parent pool, all of its children will also move down. The moved row inherits the higher hierarchy level of the row above and below the moved row.
- Add: Enter the Number Rows to indicate number of rows to insert, then click the Add icon to add rows. The default value is *1*.

Pool Name Pool names are indented or outdented according to their relative hierarchical position. Only the pool administrator or the pool manager can update this field.

Manager ID The pool's manager's ID. Only a pool administrator can edit this field.

Status Select *Active* or *Inactive* for the pool.

Note. If you inactivate a pool, the system will check to see if there are any open resource requests that have the pool specified. In addition, inactivating a pool will also cause the system to remove the pool from all resource requests with a status of *Open* that specify the pool.

View Pool Details Click this icon to update pool details. Only the pool manager, the administrator, or a pool manager from a higher pool in that branch of the hierarchy can access this page to edit these details.

View Pool Resources Click this icon to view and update the resources of the selected pool. Only the pool manager, the administrator, or a pool manager from a higher pool in that branch of the hierarchy can access this page for edits.

Managing Pool Resources

There are five methods by which resource pool assignments are made or updated in Resource Management:

- Creating a named resource.
- Adding a generic resource directly into the pool.
- Pulling a resource from the Unassigned pool.
- Batch loading resources and pool assignments.
- Transferring resources to and from pools.

When creating a resource using the Create Resources page or the Create Resources Program page, you specify the pools to which the resources belong. Specifying this at the time the resource is created streamlines the process of assigning pools.

This section contains an overview of pool resources and discusses how to:

- Manage and delete resources from pools.
- Add multiple date ranges.
- Add named resources.
- Add generic resources.
- Transfer resources between pools.
- Modify resource transfers.

See Also

Chapter 13, “Establishing Resources,” Establishing and Maintaining Employees and Non-Employees as Resources, page 128

Understanding Generic Resources

Adding generic resources to a pool helps the pool manager model future capacity of a pool. For example, a pool manager may be given authorization to hire a DBA in two months. The manager can add that DBA to his or her pool at this point by including it as a generic resource in the pool, thus enabling it to be considered for capacity planning against future demand.

Pages Used to Manage Resource Pools

Page Name	Object Name	Navigation	Usage
Pool Resources - Manage Pool Resources	RS_POOL_MEMBER	Resource Management, Manage Resource Pools, Pool Resources	View the resource information for the selected pool.
Pool Resource Detail	RS_MBR_DETAILS	Click a link in the Name column on the Pool Resources - Manage Pool Resources page.	View pool resource details and modify membership dates.
Add Named Resource	RS_ADD_NAMED	Click the Add Named Resource button on the Pool Resources - Manage Pool Resources page.	Add named resources to the pool.
Add Generic Resource	RS_ADD_GENERIC	Click the Add Generic Resource button on the Pool Resources - Manage Pool Resources page.	Add generic resources to the pool.
Transfer Resource	RS_TRANSF_MBR	Click the Transfer Resources icon on the Pool Resources - Manage Pool Resources page.	Transfer named resources from one resource pool to another.
Modify Resource Transfer	RS_MODIFY_TRANSF	Resource Management, Manage Resource Pools, Modify Transfer Resources	Modify a pending resource transfer.
Delete Confirmation	EO_DEL_CONFIRM	Click the Delete icon on the Pool Resources - Manage Pool Resources page.	Remove a resource from the pool and confirm the deletion.
Resource Pool History	RS_POOL_HISTORY	Click the Pool History link on the Pool Resources - Manage Pool Resources page.	View the pool history for a particular pool.

Managing Pool Resources

Access the Pool Resources - Manage Pool Resources page.

Name Click a link in this column to view the supply categories for the resource, add comments, and change pool membership dates and capacity percent.

Start Date and **End Date** The start date and end dates for which the resource belongs to the pool. If the resource belongs to the pool for multiple date ranges, the earliest start date and the latest end date display. If the date range is in the past, it is not included on this page. You can view historical information on the Resource Pool History page.

Multiple Dates When this icon appears next to a date range, it signifies that a resource has multiple date rows for the resource pool.

Capacity Percent Displays the percentage of availability of the resource from a capacity planning perspective. For example, if the resource is a full-time worker, the percentage should be *100%*. If the resource only works part time, the capacity percentage would be *50%* (if they only worked half of the standard work week). You can also use this field to represent a resource who works full-time but whose time is only half allocated to project work that is considered for capacity planning. In this case the capacity would be *50%*. The percentage that displays is whatever the active percentage is for the current day.

Click the Transfer Resources icon to transfer the resource to another pool.

Click the Delete icon to delete the resource and that resource's history from the pool.

For a generic resource, you might want to delete it from a pool if the resource was created in error, if the manager's headcount was removed, or if you found a named resource to replace the generic one. Deleting a generic resource from a pool will also delete *all* that resource's history.

For a named resource, you should only delete it if the resource was added in error; otherwise you should transfer the resource. If the resource has been in the pool multiple times, deleting the resource will only remove the resource's most current assignment entry, not the entire history. When a named resource is removed from a pool, he or she is then automatically added to the Unassigned pool because each resource must always be in a pool in the system.

Add Named Resource Click this button to add a named resource to the pool.

Add Generic Resource Click to add a generic resource to the pool.

Pool History Click this link to view pool history details.

Note. Current resource assignments are not included.

Transfer Resource Assignments Click this link to view and transfer, in bulk, future-dated project and activity assignments. Doing so is useful when pool managers know they are transferring a resource from their pool and have to reassign any work that a resource had been assigned to in the future.

Adding Multiple Date Ranges

Access the Pool Resource Detail page.

Pool Membership Dates

Any date periods where the end date is greater than the current date appear in this section, and you can add different date ranges with different capacity percentages for the same resource.

Start Date, End Date, and **Capacity Percent** Enter the specific additional dates in order for a resource to have multiple date ranges within the same resource pool. The date ranges cannot overlap with each other in the grid and must not overlap with dates for that resource in any other pool besides the Unassigned pool.

Once you have specified multiple date ranges for a resource, the Pool Resources - Manage Pool Resources page shows the earliest start date and

latest end date. Additionally, the capacity percent that appears on that page displays the percentage number that is current for today's date.

Adding Named Resources

Access the Add Named Resource page.

Resource Click the Lookup Employee icon to search for a resource from the Unassigned pool.

Note. When you add named resources to the pool with this method, you can only select resources that are currently part of the Unassigned pool.

Comments Supply any additional comments to describe the resource.

Start Date Supply the start date of the resource for this pool. This is a required field and it must be greater than or equal to the start date of the resource on the Unassigned Pool and less than or equal to the end date of the resource on the Unassigned Pool.

End Date Supply the end date of the resource onto the pool. Doing so is optional because upon hiring the resource, you may not know when the resource is going to leave the pool. If the resource is part of another pool in the future, the end date on this pool cannot overlap that resource's pool assignment to another pool.

Capacity Percent Enter a percentage for the resource. This value represents how available the resource is from a capacity planning perspective. For example, if the resource is a full-time worker, then they should have a capacity percent of *100%.* If the resource only works part-time, and if they only work half of the standard work week, the capacity percent would be *50%.* This is a required field and it must be greater than or equal to *0* and less than or equal to *100.*

Adding Generic Resources

Access the Add Generic Resource page.

Name Supply a descriptive name of the resource you plan to hire; for example, *Generic Developer.* This an arbitrary name of your choosing to help you distinguish this resource from others in the list.

Role SetID and **Role** Enter the appropriate setID and role from the list created within the role supply category. This is the role of the resource for that particular pool; for example, Staff Developer. Although individuals can play multiple roles within an organization depending on the project, this role is defined as the primary role and is used for capacity planning.

Region Enter the region in which the resource is needed. Select the value from the list that was created when setting up regions.

Personnel Status Enter a personnel status that designates the type of employee this resource is in the system: *Employee* or *Non-Empl* to indicate whether the resource is an employee or a contractor.

Pool Membership Dates In this group box, enter the dates and capacity percent for the generic resource.

Transferring Resources Between Pools

Access the Transfer Resource page.

Resource The resource ID and resource name default from the Pool Resources - Manage Pool Resources page and correspond to the same row on that page that contains the Transfer Resource icon you clicked.

Transfer From Displays the pool from which you navigated on the Pool Resources - Manage Pool Resources page.

Transfer To Resource Pool Specify the resource pool to which the selected resources are going to be transferred. You can select any active pool, including *Unassigned Pool.* You can only select one pool. If you select the pool to which the resource currently belongs, you receive an error upon clicking the Transfer Resource button.

Transfer Date Specify the date that this transfer becomes effective. It can be any calendar date from the current date and future.

Note. This is the date that will be the start date of the resource in the transfer-to pool . The transfer-from pool will be populated with the end date (which is the first calendar day preceding the transfer date).

Note. You cannot enter a past date as the transfer date.

Transfer Resource Click this button to complete the transfer resource process. The system checks to see if there is any pending assignment approval or assignment approval date change workflow. If there is any, the system displays this warning: “There is pending Assignment Approval or Assignment Date Change workflow for this Resource. These must be processed or cancelled before the transfer can take place. Click YES to have the system cancel all pending Assignment and Assignment Date change workflow. Click NO to cancel the transfer and take care of the pending workflow manually.” If you click YES, the transfer process will cancel all pending (incomplete) assignment approval and assignment date change workflow. If you click NO, the transfer process will not take place and the user must manually clean up the outstanding workflow before transferring the resource. We recommended that the user manually takes care of all outstanding assignment workflow so that he or she knows what the potential resource assignments were and if there were any date changes for this resource.

Modifying a Resource Transfer

Access the Modify Resource Transfer page.

Resource Select the resource involved in the pending transfer from the list. The resource’s EmplID displays.

Originating Pool Select the resource pool name of the pool from which this resource was to be transferred.

Transfer To Pool Select the resource pool name of the pool to which this resource was to be transferred.

Transfer Date	Supply the transfer date of the resource's original transfer that you want to modify.
Show Pending Transfer	Click this button to display theOriginating Pool Information and Transfer to Pool Information as well as action buttons.
Modify Transfer Date or or **Cancel Transfer**	Select to modify the transfer date and supply the new transfer date in the box provided, or select to cancel the transfer altogether.
OK	Click this button to finalize the modification.

Loading Resource Pool Information in Batch

This section provides an overview of the Resource Pool Import utility and discusses how to:

- Navigate within the import spreadsheet.
- Modify resource pools in batch.
- Modify named resource pool assignments in batch.
- Modify generic resource pool assignments in batch.
- Import resource data.
- Perform mass pool changes.

Understanding the Resource Import Utility

You use the Mass Pool Changes menu to manage the steps in the import process.

To be able to use the mass pool functionality to load changes to resource pools into PeopleSoft, users must have as part of their permission lists the WEBLIB_RS web library. To enable this, select PeopleTools, Security, Permissions & Roles, Permission Lists, Web Libraries. Click the Edit link for the WEBLIB_RS web library name, then select *Full Access* for the POOL_IMPORT.FieldFormula.IScript_Import_Pools function.

To upload an Excel file, use the Submit Pool Changes link on the Mass Pool Changes page. Once the data from the file is in the interface tables in PeopleSoft, you must fix any errors and then submit the data for validation. If there are no errors then submit pool changes.

Click the Import Pool Data button on the Excel sheet to initiate the import process.

The system stores the Excel file for Mass Pool Changes in the Excel directory on the drive where PeopleTools is located. For example, if your PeopleTools is stored in *c:\pt846* then the Resource Pool Entry.xls spreadsheet will be in *c:\pt846\excel*. You should copy the spreadsheet onto your local drive in order to do the pool updates.

Pool assignments and tracking of pool information is critical to the success and usefulness of capacity planning. It is critical to be able to load large volumes of resource pool information quickly and efficiently. The Resource Import Utility provides an easy way to accomplish this. There are two scenarios in which you would typically want to make batch changes to pool information:

- During implementation, you can load the initial large volumes of resource information.
- For reorganizations, which can occur frequently , you can quickly update pool assignments and rebuild the pool hierarchy in batch.

The delivered Resource Pool Entry.xls spreadsheet comprises four sheets:

- Resource Pool Import Utility Home Page:

  Select the actions to perform for the spreadsheet
- Pool Modification:

  Add or modify resource pools.
- Resource Pool Assignments:

  Add, modify, or delete named resource pool assignments.
- Generic Resource Pool Assignments:

  Add, modify, or delete generic resource pool assignments.

To submit batch pool changes the pool administrator completes the following steps:

1. Complete the Resource Pool Entry.xls spreadsheet with the pool information to load or update.
2. Submit the changes by clicking the Import Pool Data button on the Resource Pool Import Utility Home Page sheet. You then enter server address and access information to import the resource data and submit the process. This moves the data to PeopleSoft staging tables.
3. Access the Mass Pool Changes page in PeopleSoft and click the Submit Validation Process link to have the system validate the data.
4. If there are errors during the processing, click the Fix Errors link and correct the errors.
5. Validate the data again by clicking the Submit Validation Process link.
6. If there are still errors present, repeat steps 4 and 5 until you receive no errors.
7. Once you receive no errors, click the Submit Pool Changes link on the Mass Pool Changes page.

Pages Used to Load Resource Pool Information in Batch

Note. In addition to the Mass Pool Changes page, you also use the four pages within the Resource Pool Entry.xls spreadsheet.

Page Name	Object Name	Navigation	Usage
Mass Pool Changes	RS_MASSPOOL_RUN	Resource Management, Manage Resource Pools, Mass Pool Changes	View the status of submitted changes from the Excel spreadsheet upload, submit a process to validate pool changes, or submit a process to purge the import table.

Navigating Within the Resource Pool Entry Spreadsheet

Access the Resource Pool Entry.xls spreadsheet on your local drive. Select the Resource Pool Import Utility Home sheet.

Add/Modify Resource Pools Click to add or modify resource pools.

Change Named Resource Pool Assignments Click to add, delete, or change named resource pool assignments.

Change Generic Resource Pool Assignments Click to add, delete, or change generic resource pool assignments.

Import Pool Data Click to enter the appropriate server access information to import the resource pool data and submit the data for import.

Modifying Resource Pools in Batch

Access the Pool Modification sheet.

Action
- Select *Add* to add a resource pool. You must supply the pool name, manager employee ID, and status. The pool ID is generated by the system.
- Select *Change* to change existing pool information. The only required field in this case is the Pool ID and any other fields you want to change.

Pool ID Enter a value only when changing pool information.

Pool Name, Manager Employee ID, and **Status** Enter values when adding a pool. Status can either be *Active* or *Inactive.*

Parent Pool ID and**Parent Pool Name** Enter values for the parent pool of a pool that you are adding or changing, if applicable. This is used to build the hierarchy of pools in the system. If you do not supply a value and the Action is *Add,* then the new resource pool will be placed at the highest level (most outdented) of the pool hierarchy.

Pool Description Enter a description of the pool in the system.

Modifying Named Resource Pool Assignments in Batch

Access the Resource Pool Assignments sheet.

Action Select an action:

- *Add:* Add a named resource to the pool. You must supply the Employee ID, Pool Name or Pool ID, Start Date, and Capacity.

  Note. If the pool is newly added in the spreadsheet, you will not yet have a pool ID (because it is system-generated) so you must specify the pool name. When the process encounters pool name without a pool ID in this spreadsheet, it assumes you are referring to a newly created pool. If the pool name is not in the current Resource Pool Modification spreadsheet (with an action of add), an error occurs, even if the pool name already exists in the system. If the pool that is being affected already exists in the system, you must enter a pool ID.

- *Change:* Change an existing resource's assignment. The only required fields in this case are the Pool ID and Employee ID. Enter the additional data that has changed.
- *Delete:* Delete a named resource's pool assignment. Required fields are Employee ID, Start Date, and Pool ID.

Note. *Change* and *Delete* actions are only valid for existing pools, not newly created pools that are being added through the Pool Modification spreadsheet.

Modifying Generic Resource Pool Assignments in Batch

Access the Generic Resource Pool Assignments sheet.

Action Select an action:

- *Add:* Add a generic resource to the pool. You must supply the Resource Name, Pool Name or Pool ID, Start Date, Capacity, SetID, Region, and Personnel Type.

  Note. If the pool is newly added in the spreadsheet, you will not yet have a pool ID (because it is system-generated) so you must specify a pool name. When the process encounters pool name without a pool ID in this spreadsheet, it assumes you are referring to a newly created pool. If the pool name is not in the current Resource Pool Modification spreadsheet (with an action of add), an error occurs, even if the pool name already exists in the system. If the pool that is being affected already exists in the system, you must enter a pool ID.

- *Delete:* Delete a generic resource's pool assignment. Required fields are Resource Name, Start Date, and Pool ID.
- *Change:* Change an existing generic resource's assignment. The only required fields in this case are the Pool ID and Resource Name. Enter the additional data that has changed.

Note. *Delete* and *Change* actions are only valid for existing pools, not newly created pools that are being added through the Pool Modification spreadsheet.

Importing Resource Data

Access the Import Dialog box by clicking the Import Pool Data button on the Resource Pool Import Utility Home Page sheet.

Server Address Enter the location of the server on which to load the pool information.

User ID and**Password** Enter the ID and password with which to log into the PeopleSoft system.

Automatically run pool update process Select this check box if you want to automatically load the pool information directly into the pool transaction tables. If you do not select it, the data will be left in the staging tables. This option gives you the ability to run multiple imports without affecting the pools transactional tables. At a later time, you can run the update process to move the information from the staging table and load it into the pool transaction tables.

Note. If you select this option on the import process, it does not guarantee that the pool information will be updated automatically in the system. Before the information is taken from the staging tables and loaded into the pool tables, the validation process is run on the data to ensure it does not violate any business rules. If there are violations, the data will not be loaded into the transactional tables. At that point, access the Mass Pool Changes page, fix the errors, and import.

Perform Mass Pool Changes

Access the Mass Pool Changes page.

Current Status Displays the current status according to the action and the Application Engine Process results.

Fix Errors Click this link to access the Validation Errors page to view and fix pool change data errors.

Note. You cannot submit the pool changes unless you clear all validation errors.

Submit Validation Process Click this link to submit the validation process on the imported data.

Submit Pool Changes Click this link to submit the Pool Changes process. This process takes the data imported into the system and updates the transactional data with the changes.

Process Monitor Click this link to access the process monitor to view the status of a process (either the Validation or Pool Changes).

Submit Purge Process Click this link to submit the process to purge the imported data in the system.

CHAPTER 17

Enabling Resource Matching and Cache Processes

This chapter discusses how to:

- Establish resource groups.
- Define flexible attributes.
- Set up the Verity Search engine and Resource Matching processes.
- 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.

Understanding Resource Groups

Resource groups are collections of resources that you define by organizational unit, supervisor ID, or resource pool. 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 22

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 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 the Add button on the Resource Group Definition - Resource Groups page. • Click the Edit button 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.

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.

Description 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 Pool Select to establish a resource group based on a resource pool. Selecting this option displays a read-only pool hierarchy showing only active pools. You can expand the hierarchy and select any pool by selecting its check box. If you select the check box for a parent pool, all its children will automatically be selected.

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 by clicking the respective link to search for organizations to include in the resource group.

The Advanced Search or Basic Search links options display only if you are establishing a resource group based on organization structure.

Finding Organizations Using the Basic Search

Access the 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 the OK button to return to the Resource Group Definition - Resource Groups page. The new resource group appears in the Available Groups group box.

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.

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 this button 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.

OK Click this button to populate the Available Groups group box 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.

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 this button to execute the search. The list of supervisors that match that search criteria appears in the Search Results group box.

Search Results — Select the check box next to one or more supervisors.

Select — Click this button to add selections to the Resource Group Definition group box.

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.

Creating Resource Groups by Resource Pool

Access the Resource Group Definition - Resource Group Details page. Select the Select by Pool option.

Pool Name — Expand the pools as necessary to assess which ones to use to create your groups.

Select — Select the check box in this column for each pool row you want to use.

Select — Click this button to add the selected pools to the Resource Group Definition group box.

OK — Click this button to add the selected resource pools to the Available Groups group box.

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 Resource Management, you do not need to complete these tasks.

See Also

Chapter 3, "Understanding Resource Matching," Flexible Attributes, page 19

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 immediately implements the changes.

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.

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.

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.

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 Resource Management. Modify the selection as business needs change.

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 Factor Weights page, if the search type selected is *RSFSR* or *RSRSR*.

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 Resource Matching calculations of factor fit scores.

  Resource Matching 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 Factor Weights page, if the search type selected is *RSFSR* or *RSRSR.*

Important! After you create a new flexible factor, you must indicate its relative importance within the factor family on the Factor Weights page.

See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Setting Up Resource Management Installation Options.

Setting Up the Verity Search Engine and Resource Matching Process

Use the pages described in this section to set up the tables and processing rules that Resource Management uses when running the Verity search engine processes.

You should periodically run the Resource Matching process to correct inaccuracies in the data, and to reorganize the database indexes for these tables, as well as to update standings.

This section discusses how to:

- Define the Verity settings.
- Define factor weights.

- Refresh cache tables and build the Verity indexes.
- Maintain and schedule the Verity Index File Creation process and the Cache Creation process.
- Run the Optimization Cache program.
- Run the Cache Administration program.

Pages Used to Set Up the Verity Search Engine and Resource Matching Process

Page Name	Object Name	Navigation	Usage
Verity Settings	RS_VERITY_CONFIG	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Search Configuration	Configure parameters for the Verity search engine.
Factor Weights	RS_SRCH_FACT_WGHT	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Search Configuration, Factor Weights	Define the relative importance of each factor within its family.
Miscellaneous	RS_CACHE_MISC	Set Up Financials/Supply Chain, Common Definitions, Search, Cache Administration	Specify processes to refresh cache tables and create verity collections.
Maintain Search Index	RS_SRCH_INDEX	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration, Maintain Search Index	Capture the parameters needed to create the Verity index files.
Refresh Optimization Cache	RUN_RS_DF	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration, Refresh Optimization Cache	Recalculate and cache selected factor fit scores for all eligible resources.
Summary	RS_CACHE_SUMMARY	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration, Summary	Confirm the list of processes that you want to run or schedule for the future.

Defining the Verity Settings

Access the Verity Settings page.

Search Type Displays the types of search:

- RSFSR (express search; fulfill orders)
- RSRSR (Job Spy; Manage Utilization)

Note. The search type *RSFSR* is also used for Pool Manager Workbench searches.

Verity Model This is a display-only field that directs the Verity search engine to read a specific collection. All delivered searches create two sets of search collection files—collection A and collection B. . When Verity collections are being created or updated, users cannot search them. Therefore, the system keeps a backup collection file to be available to users will another collection is created or updated. For PeopleSoft Staffing Front Office to add new rows into the search collection, the system alternates between collection A and collection B. When collection A is in use, all updates are done on collection B. After the updates are completed for collection B, the system automatically moves users to collection B and collection A is released. This alternating approach enables the system to add new rows into the collection without forcing users to log out.

File Settings

Enter the location of the style files in the Style Files field. The directory specified here must contain the delivered style files. The Search Style files are located in PS_HOME/Data/Search. For each FO_FO_STAFFING directory, a style directory must be present and a series of style files must exist under that directory.

When you select a PeopleSearch (PLSRC) or PeopleMatch (PMSRC) search type, the Resume Files field also appears, in which you can enter the location of the folder where you store your resume files. The system reads the resumes in the folder when building the Verity collection. This applies to PeopleSearch and PeopleMatch only. The resume attachment feature for applicants and employees allows applicants to attach their own resumes to Staffing Front Office. The attachment process uses FTP to move the resumes from the users' own workstations into a designated system directory. Verity needs to know the location of that system directory before it can incorporate the resume into the Search File Creation process.

Note. Verity needs to know the actual directory path, such as *c:\resumes\hold.*

Performance Settings

Define the size of your result set by entering a value in the Buffer Resultset Size (in rows) field.

Availability Method

Enter a method to that the system will use to calculate availability scores in the verity search results: *Daily Summarization* or *No Availability Calculation.*

Note. This group box appears only if you select the PeopleSearch (PLSRC) or PeopleMatch (PMSRC) search type. when Daily Summarization is selected, the system calculates the percentage of time that a resource will be available between the start and end dates specified in the Order or in the PeopleSearch component. When No Availability Calculation is selected, the system does not calculate availability scores and users may have to rely on other information such as the count of active assignments to infer whether a resource is available or not.

Defining Factor Weights

Access the Factor Weights page.

Preferencesand **Qualifications** For each factor family grouping, enter the relative importance of each factor, such as AccomplishmentsCompetency Proficiency, or Resume. Values are *0 - Not at all important, 1 - Much less important, 2 - Less important, 3 - Important, 4 - More important,* or *5 - Much more important.*

Refreshing Cache Tables and Building the Verity Indexes

Access the Miscellaneous page.

Refresh Current Eligible Resources

Select this check box 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 and location. The program is required when routine changes are made to a resource's job-related information.

Run this program nightly and as required.

Refresh Resource Schedule Cache

Select to update the Resource Schedule 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:

- Implementation takes place.
- Standard hours or default days change in the Scheduling Options group box on the Common Installation Options page.
- New holidays are added to the holiday schedule and loaded using the Holiday Load Application Engine process (RS_HOLIDAY).

This program runs automatically for a resource when the resource's schedule changes. Run the program manually for all resources as required.

Select Create New or Update Existing.

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:

- Implementation occurs.
- Resources are created individually using the Establish Employee As Resource component (RS_WRKR_CREATE).
- 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.

Run this program nightly.

See Also

Chapter 17, "Enabling Resource Matching and Cache Processes," Administering Cache and Maintenance Processes, page 187

Maintaining and Scheduling the Verity Index File Creation Process and the Cache Creation Process

Access the Maintain Search Index page.

Process Selection

Select the Maintain Search Index check box to create the search index as part of this Cache Administration run control.

Indexing Options

Select Create New to delete the existing index and create a new one. Use this option to replace the Verity index.

Select Update Existing to update the existing index without deleting it by inserting new documents and updating those that have been changed since the last time the update process ran.

Index Language

Specify whether the index should be created for all installed languages or a single language.

- Select All Installed Languages to create a collection for each installed language.
- Select Specific Language to specify a language, and enter the language for which you want to create index files in the adjacent drop-down list box.

Index

Specify a Search Type for the index creation.

Running the Optimization Cache Program

Access the Refresh Optimization Cache page.

Refresh Optimization Cache	Select to include the Refresh Optimization Cache Application Engine process (RS_DF) as part of this Cache Administration run control.

Running the Cache Administration Program

Access the Summary page.

Select any of the following check boxes to include the process in the run:

- Refresh Resource Organizational Unit Cache
- Refresh Resource Schedule Cache
- Refresh Current Eligible Resources
- Maintain Search Index
- Maintain Employee Data Cache
- Refresh Supply/Demand Cache
- Refresh Supply Category Analytics Cache
- Refresh Optimization Cache

Process Monitor	Click this link to review the status of the process scheduler job you initiated when you clicked the Run button.
Run	Click this button to run the cache administration program.

Administering Cache and Maintenance Processes

This section provides overviews of cache administration processes, Resource Matching temporary work tables, and the Verity search index, and discusses how to:

- Refresh cache tables and purge data.
- Maintain the Verity search index.
- 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 Resource Management. The cache processes update cache tables that are used by various Resource Management activities such as fulfilling service orders, managing resource utilization, and capacity planning. The maintenance processes purge unnecessary data from the system such as obsolete resource schedules.

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 run in batch, 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).

Thus every row in the table has an expiration date that is equal to the earliest future effective-dated information available for the candidate. The Cache Administration Application Engine can either recreate the information in the table from scratch or can update only those rows where the expiration date has been reached.

Note. Because the Update Existing option is specifically intended to reflect future effective-dated changes, we recommend that you run the process daily—ideally right after midnight—to keep the information in the Maintain Employee Data cache table as current as possible. It is only necessary to run the Create New option after such events as upgrades, data migration processes, and so on.

Understanding Resource Matching Work Tables

Resource Matching uses temporary work tables when calculating availability 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.

Understanding the Verity Search Index

Verity is a free text search engine used to search structured and unstructured data. Verity quickly calculates competency fit scores for each resource. PeopleSoft uses the Verity search engine for the following purposes:

- Resource Matching uses Verity to determine a resource's fit for a resource request for the all the factors except the Availability factor.

  During the process of calculating fit scores, the factors use the Verity index to find matches for key items 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.

Note. The Staffing Workbench component (Fulfill Orders page and Manage Utilization page), My Assignments component, and Pool Manager Workbench component all use the Verity search engine as well.

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.

  There are two types of searches you establish: forward, which is used for Express Search, Fulfill Orders, and Pool Manager Workbench; and reverse, which is used for Manage Utilization and Job Spy.
- 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 Financials. If you do not use the Verity searching capabilities, Resource Management cannot calculate the fit score for a resource, find the best resources for a resource request, find the best request to fit a resource, or perform optimization.

Availability factor fit scores are calculated when you:

- Search for resources to fulfill potential assignments using a resource request.
- Search for resource requests for a resource.
- View the job scorecard.

When changes are made to the resource request, resource profile, or resource schedule, the system logs the employees or the resource requests that changed and updates them in the next update index run.

When certain nonroutine events occur in the system, such as when data changes on the Job (JOB) or Installation (INSTALLATION_RS) records , you must run the Refresh Current Eligible Resources, Refresh Resource Schedule Cache, and Refresh Resource Organizational Unit Cache processes You can run these processes immediately or schedule them to run at intervals during a time when system usage is low.

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 indexes that are used for searching.

The Verity search engine creates the indexes based on the input and data files that are in the Index File Path directory specified on the Index Administration page.

There are two search types: RSFSR (forward) and RSRSR (reverse); and two models (A and B). For each search type and model, the system creates two files *per language* (lang): a data file and an input file.

The files used to create the indexes are as follows:

- Forward search create index: RSFSR_DAT_<lang>_C.DAT and RSFSR_INP_<lang>_C.BIF
- Forward search update index: RSFSR_DAT_<lang>_U.DAT and RSFSR_INP_<lang>_U.BIF
- Reverse search create index: RSRSR_DAT_ENG_C.DAT and RSRSR_INP_ENG_C.BIF
- Reverse search update index: RSRSR_DAT_ENG_U.DAT and RSRSR_INP_ENG_U.BIF

The .BIF 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 .DAT file (in the form of offset and size). The .DAT file contains the remainder of the data—the Verity zones. On the Process Scheduler server the files have the following format:

- RSFSR_INP_<lang>_C.BIF (for example, RSFSR_INP_ENG_C.BIF if the language is English)
- RSFSR_DAT_<lang>_C.DAT (for example, RSFSR_DAT_ENG_C.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 are created by this utility to perform searches.

A–B Model Structure

PeopleSoft 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 Resource Management and are used to define the index structure for Verity. Do not change the style files. When you install Resource Management, the following style files are installed in the directories $PS_HOME\data\search\RSFSR_Master\Style\ and $PS_HOME\data\search\RSRSR_Master\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
- vgwhttp.cfg
- vgwhttp.gfl
- vgwhttp.prm
- vgwhttp.vgw

Pages Used to Administer Cache and Maintenance Processes

Page Name	Object Name	Navigation	Usage
Miscellaneous	RS_CACHE_MISC	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration, Miscellaneous	Initiate Resource Management Application Engine processes to refresh cache tables or purge unnecessary data.
Maintain Search Index	RS_SRCH_INDEX	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration, Maintain Search Administration	Configure the Verity environment and create a search index from competencies, accomplishments, preferences, resource work experience information, and resume attachments.
Refresh Optimization Cache	RUN_RS_DF	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration, Refresh Optimization Cache	Refresh the Optimization cache data.
Summary	RS_CACHE_SUMMARY	Select the Summary tab within the Cache Administration component.	Confirm the list of processes that you want to run or schedule for the future.

Refreshing Cache Tables

Access the Miscellaneous page.

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.

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 data and ineligible resource data. It is required when:

- Standard hours or days change on the Installation Options - Resource Management page.
- New holidays are added to the holiday schedule and loaded using the Holiday Load Application Engine process (RS_HOLIDAY).
- 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 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 Supply/Demand Cache

Select this check box to update the cache tables for both supply and demand.

A message is triggered to update the Supply Cache table when an employee is established as a resource and therefore added to a resource pool in Resource Management, and when the resource is removed or inactivated as well. The Demand Cache table must be updated when a new generic resource request is created and when a new resource assignment is created through the project resource list in Program Management.

Note. Application messaging automatically updates the resource supply information and the project demand information in a manner very close to real time. However, the application messages are delivered inactive. You must activate the message and the message subscription to update the cache tables at run time. The message and message channel are RS_DMD_CACHE_SYNC with RS_DMD_CACHE, and RS_SUP_CACH_SYNC with RS_ESA_SCP_CACHE.

Refresh Supply Category Analytics Cache

Select this check box to update the cache tables for supply category analytics. Doing so will update the cache tables RS_POOLRES_DATE and RS_GENRES_TMP for all resources.

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 entries *RSFSRA* and *RSFSRB* for forward searches (Express Search and Fulfill Orders) and entries *RSRSRA* and *RSRSRB* for reverse searches (Manage Utilization and Job Spy), and set the path to the Verity index by using the following format:

   <INDEX NAME>=<LOCATION>

   A Windows NT example is: *RSFSRA=C:\PT846\DATA\SEARCH*.

   A UNIX example is: *RSFSRA=/ds1/pt846/data/search.*

   A folder with the name of the index (RSFSRA, RSFSRB, RSRSRA, RSRSRB) 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 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 Optimizeoption runs a Verity optimization of the index. This adjusts the index for changes done through updates and deletes.

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:

Create New: Select this option to delete the existing index and create a new one. Use this option to routinely replace the Verity index.

Update: to update the existing index without deleting it.

	*Optimize*adjusts the index for changes done through updates and deletes. This option compresses the deleted documents and improves the search response time after updates.
Index Language	Specify the index to run for all installed languages or a single language.
Save	Click Save to save the run control, or select Miscellaneous, Refresh Optimization 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 Optimization Cache Table

Access the Refresh Optimization Cache page.

Run the program at implementation and as required.

Refresh Optimization Cache	Select to include the Refresh Optimization Cache Application Engine process (RS_DF) as part of this Cache Administration run control.
Save	Click to save the run control, or select Miscellaneous, Index Administration, or Summary to access other Cache Administration pages.

Note. You must update both the Verity search index and refresh the Resource Schedule cache in order to obtain accurate factor fit scores in your search.

Running the Cache Administration Program

Access the 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 18

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 an Analytical Server domain that is dedicated to run resource optimization processes on a separate physical server.

- Configure the Application Server domain with the Analytical Server enabled.

Important! Each optimization process run requires a dedicated Analytical Server. If you run optimization processes concurrently, there must be an equivalent number of Analytical Servers enabled. Since the Analytical Server is also used for other functions (such as ACE), you have to enable the appropriate quantity of Analytical Servers for optimization processes and other processes.

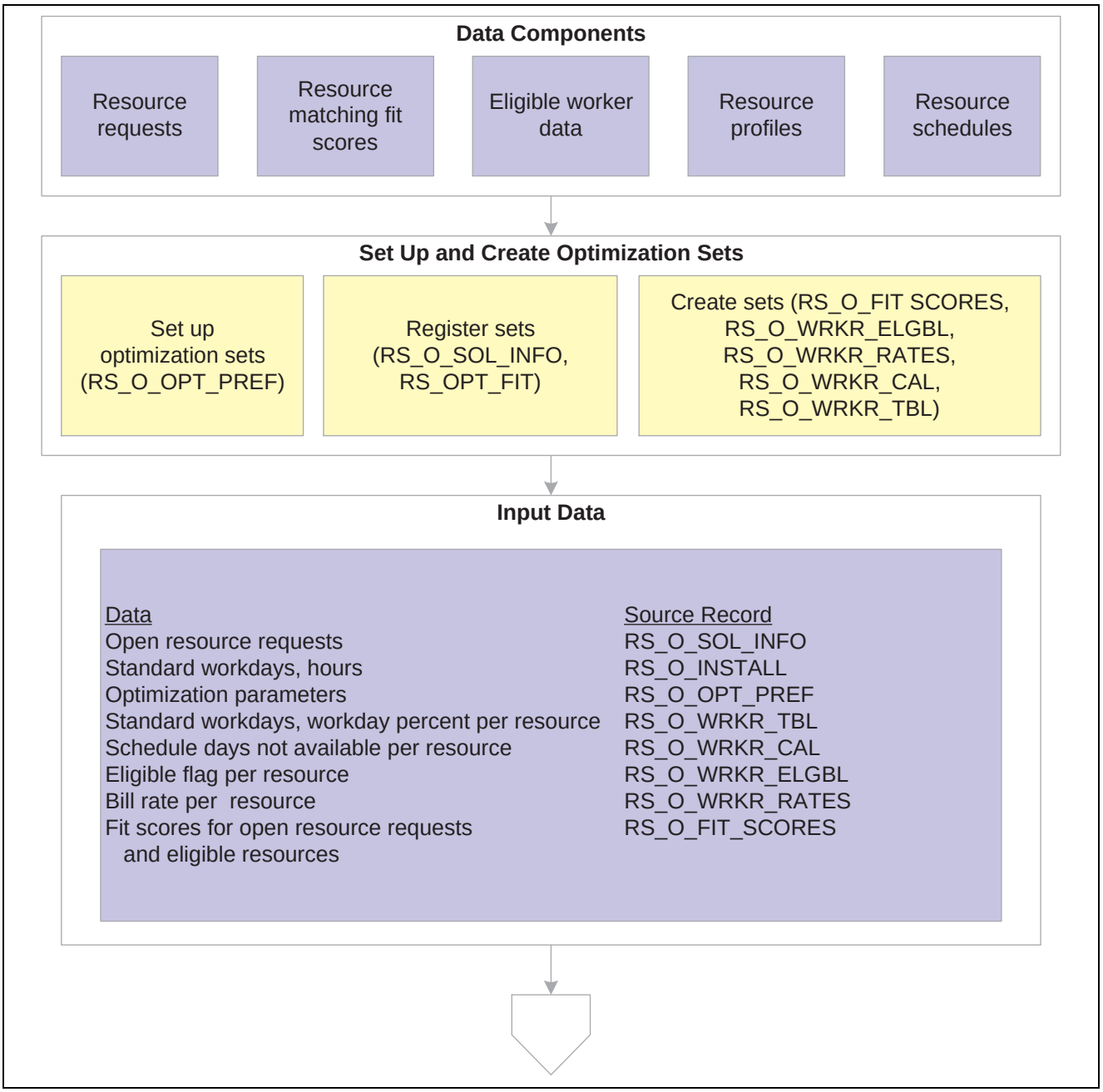
See *PeopleTools Hardware and Software Requirements Guide*, "Appendix D: Financials/ESA Hardware and Software Requirements" on the PeopleSoft Customer Connection website for information on requirements for the Resource Optimization feature.

See Also

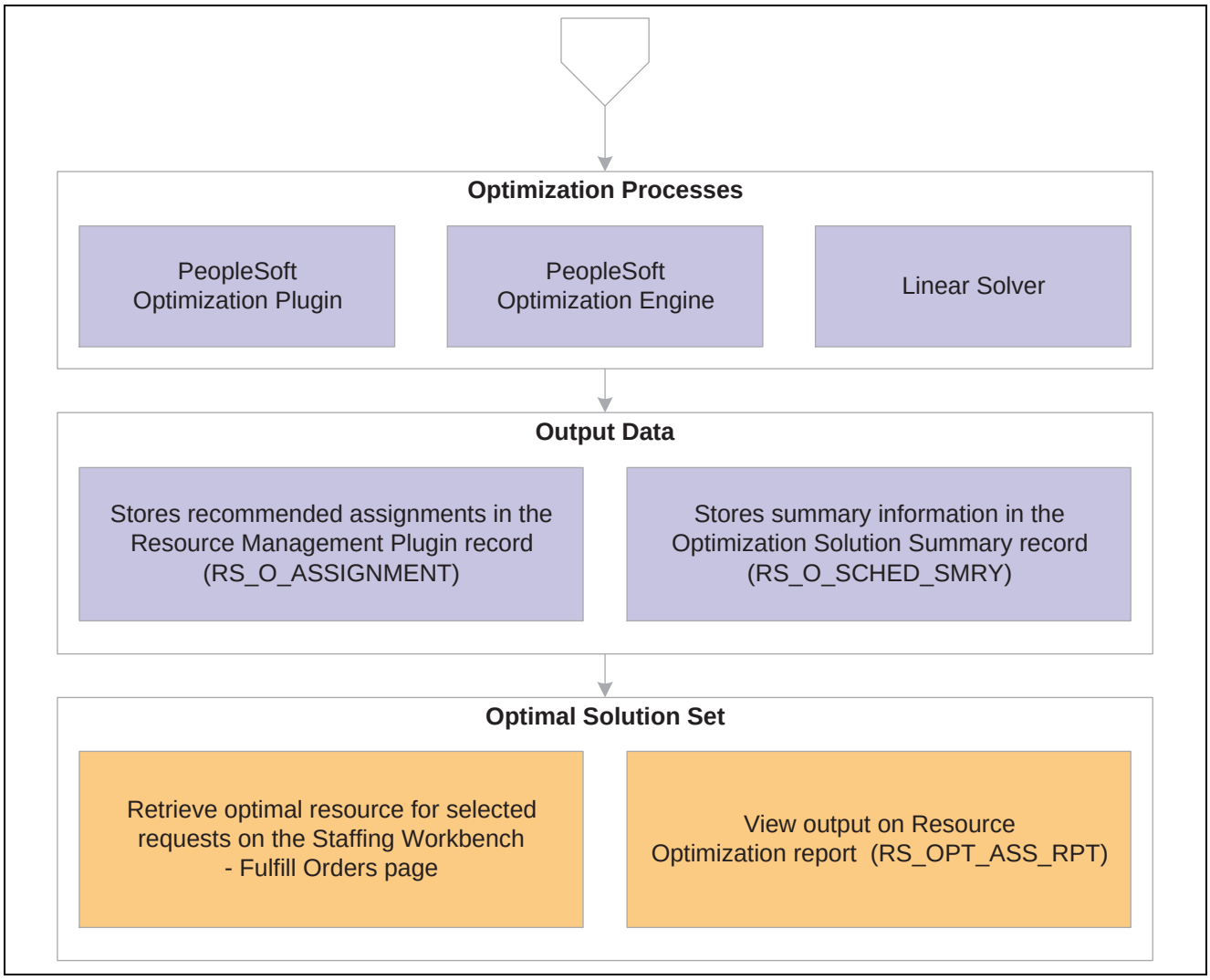
PeopleTools PeopleBook: PeopleSoft Optimization Framework

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).
- 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).

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.

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	Resource Matching 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 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.
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 *days of work* / (*latest assignment day* - *earliest assignment day* +1). 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.

Rule	Constraint Type	Description
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 *Employee.* Resources with the personnel status *Non-Employee* 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.
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.

Rule	Constraint Type	Description
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 *number of hours in a standard workday* multiplied by the *requested days of work.* 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 *Assigned, Pending Approval,* or *Reserved.*
Standard work days	Hard	The number of hours in a full workday is specified during PeopleSoft Resource Management installation. On a resource request, *days of work* 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:

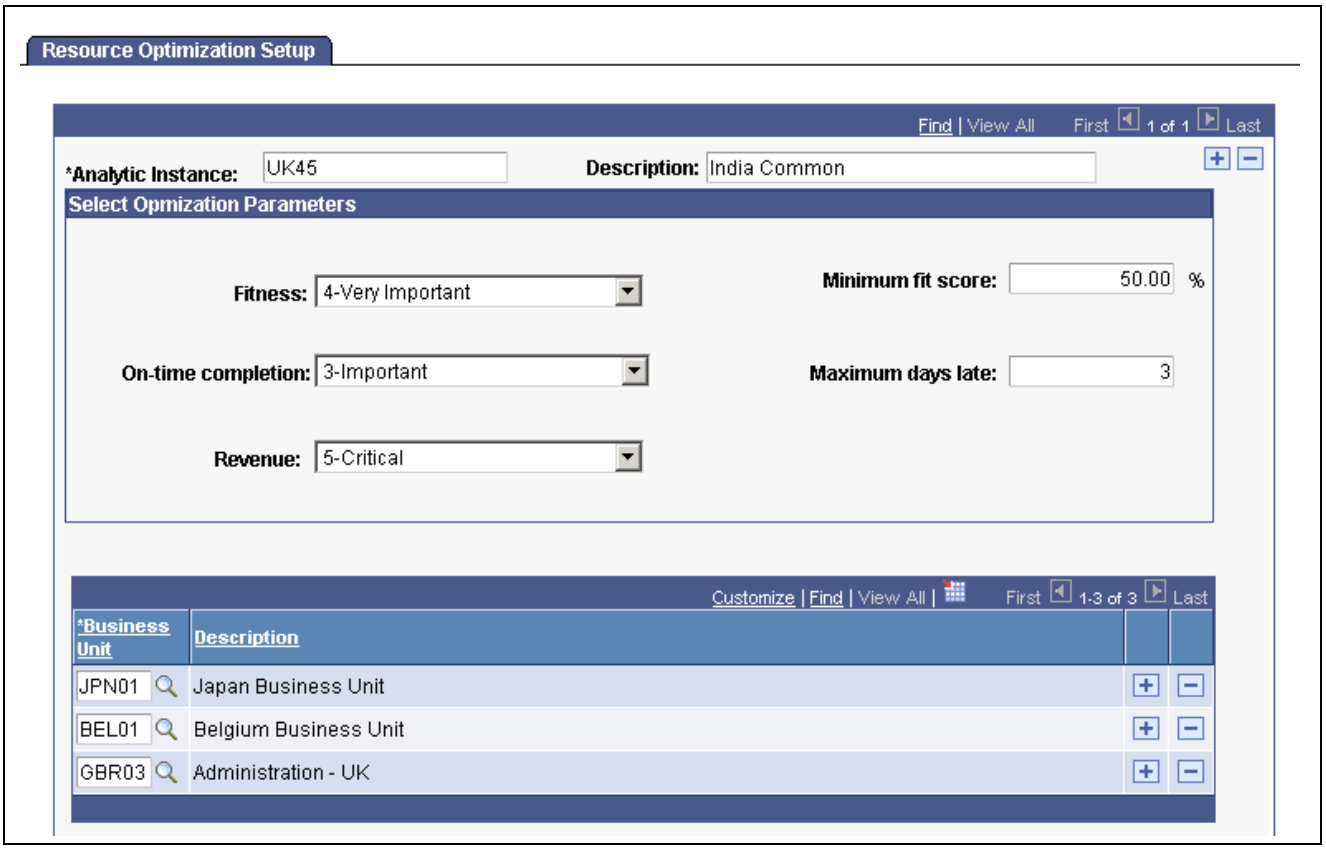
- Define optimization sets.
- Register and create solution sets.

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	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	Select solution sets to include in a run control.
Process Scheduler Request	PRCSRQSTDLG	Click the Process Request button 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 page

Analytic Instance and **Description**

Enter a new analytic instance 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 Resource Matching 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 *50.00.*

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 *10,* 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.

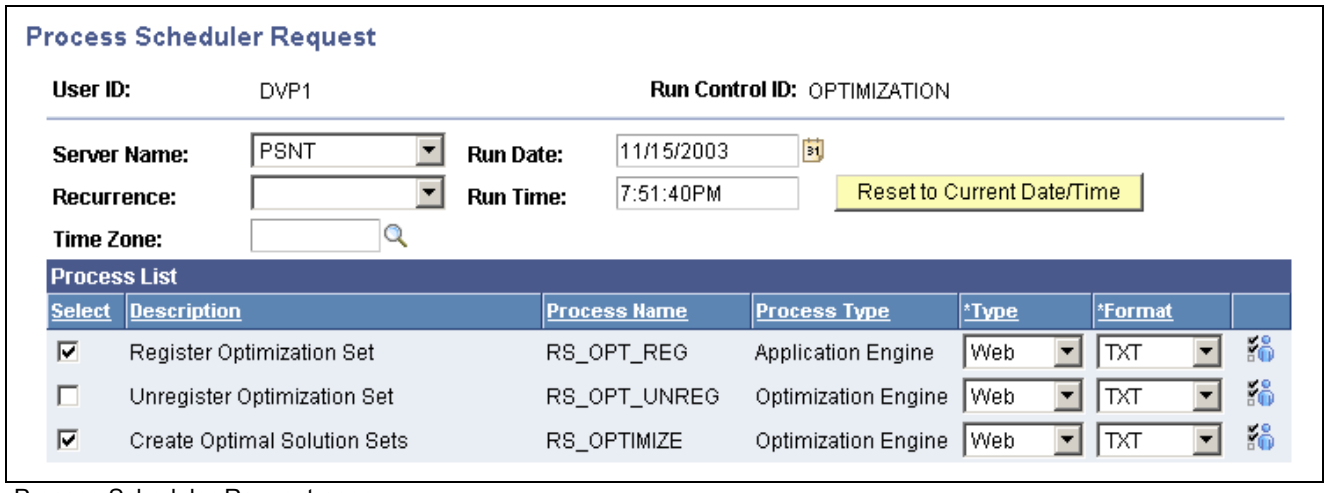
Select Solution Sets

Access the Administer Resource Optimization page.

Analytic Instance Enter the solution sets to include in the run control.

Register and Create Solution Sets

Access the Process Scheduler Request page.



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 24, “Fulfilling Service Orders,” Fulfilling Open Resource Requests, page 312

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Refreshing the Optimization Cache

Perform the following steps to refresh the Optimization cache.

1. Select the Enable Resource Optimization check box in the Optimization group box on the Installation Options - Resource Management page.
2. Create an Analytic Instance on the Administer Resource Optimization page.
3. Access the Refresh Optimization Cache page, select the Refresh Optimization Cache check box, and save the page. Select the Summary tab and click the Run button to run the Cache Administration process to update the Optimization Cache tables.
4. If you now update the service order—for example, if you change the qualifications on a resource request—the application message SERVICE_ORDER_UPDATE updates the optimization cache table. (This will occur only if the Enable Resource Optimization check box is selected on the Installation Options - Resource Management page.)
5. Run the Resource Optimization process by accessing the Process Scheduler Request page and selecting the Register Optimization Set check box and the Create Optimal Solution Sets check box to register and run the process.
6. Access the Fulfill Orders page, select the left-hand column check box for each of the service orders for which you want to retrieve the solution.

   Click the Retrieve Optimal Resource for selected Requests icon to retrieve optimal resources for the selected resource requests. 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 only visible if you have successfully run the Resource Optimization Solve process.

Note. You must first have selected the Enable Resource Optimization check box on the Installation Options - Resource Management page, and must have created an analytic instance and registered the optimization set in order for the Retrieve Optimal Resource for selected Requests icon to display. An analytic instance is a prerequisite to registering an optimization set.

See Chapter 24, “Fulfilling Service Orders,” Searching for Resources, page 318.

Viewing Optimal Solution Sets

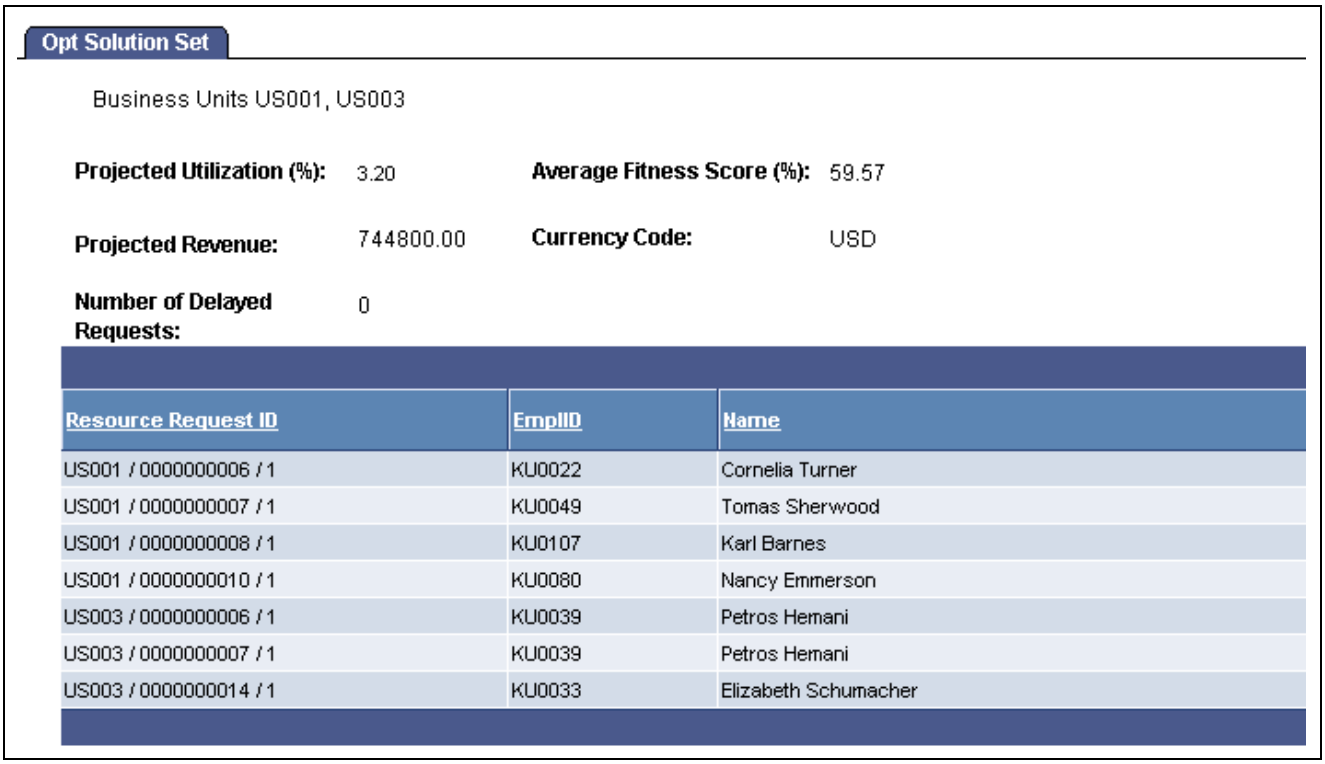
This section discusses how to view optimal solution sets.

Page Used to View Optimal Solution Sets

Page Name	Object Name	Navigation	Usage
Opt Solution Set (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 Solution Set (Optimal Solution Set) page.



Opt Solution Set

Business Units US001, US003

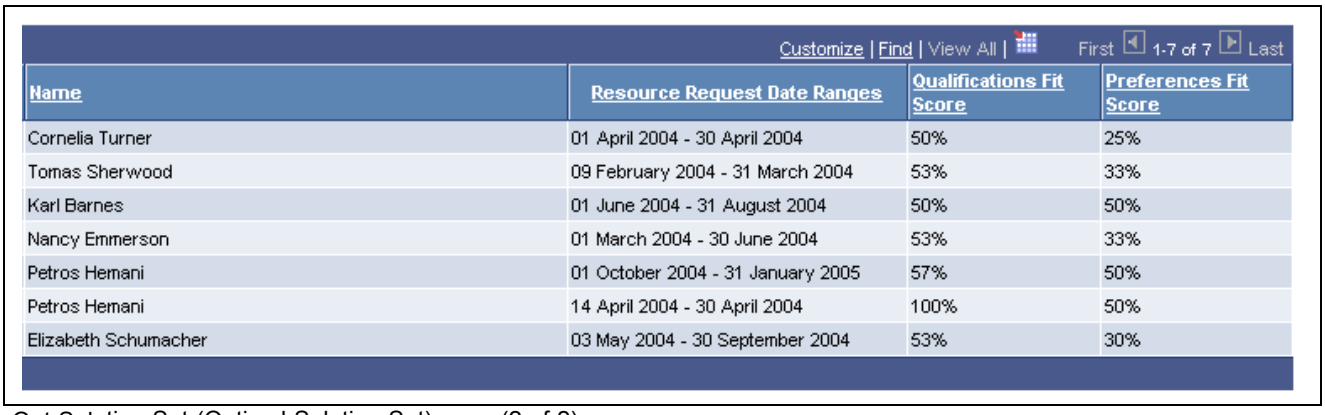
Projected Utilization (%): 3.20 **Average Fitness Score (%):** 59.57

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 Solution Set (Optimal Solution Set) page (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 Solution Set (Optimal Solution Set) page (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 Resource Matching.

CHAPTER 19

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 to calculate the resource's fit scores. 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 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 Enterprise Resource Management before you can work with their resource profiles.

See Chapter 13, "Establishing Resources," page 127.

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 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 Resource Management data tables is updated in near real time.

If the employee source database is PeopleSoft Resource Management and Supply Chain 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 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 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 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 FSCM 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 with Resource Options, the system sends an email notification to the resource manager (as defined in the Job record) when competencies or 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 FSCM 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	If Employee Source Database is PeopleSoft HRMS
Objective: 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.
Areas of specialty: 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).
Work experience: 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.

Resource Profile Category	If Employee Source Database is FSCM	If Employee Source Database is PeopleSoft HRMS
Qualifications: 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 (REVW_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). 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).	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 (REVW_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 *Self, Peer,* or *Supervisor/Manager,* 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. 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).

Resource Profile Category	If Employee Source Database is FSCM	If Employee Source Database is PeopleSoft HRMS
Preferences: A resource's individual preferences for assignments; 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.
General information: A resource's address, phone numbers, job information, passports and visas, weekly work days, home airport, assignment restrictions, resumé 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.

Resource Profile Category	If Employee Source Database is FSCM	If Employee Source Database is PeopleSoft HRMS
	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 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.
	Resumé document attachments are stored on the File Transfer Protocol file server. Information about the attachments, such as employee ID, description, and default resumé flag, are stored in the PeopleSoft Resource Management Attachments record (RS_ATTACHMENTS).	Resumé document attachments are stored on the File Transfer Protocol file server. Information about the attachments is stored only in the FSCM database.

Resource Profile Category	If Employee Source Database is FSCM	If Employee Source Database is PeopleSoft HRMS
Resource profile (summary): A single, display-only page.	The regions that appear are selected on the Installation Options - Resource Management page during implementation.	Not applicable.
Supply categories (Additional Resource Information):	• Project role and region are stored in RS_WORKER_TBL. • RS_WRKR_POOL_VW is used to get the resource pool information.	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, areas of specialty, and additional resource information.
- 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
Profiles - Overview	RS_ERES_OVERVW	• Resource Management, Maintain Resource Profiles, Profiles • Resource Management, Maintain Resource Profiles, My Profile, Overview	View or modify a resource's objective, areas of specialty, and additional resource information.
Profiles - 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.
Profiles - 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.
Profiles - Preferences	RS_ERES_PREFS	Click Preferences on any Resource Profile page.	View or modify resource preference information.
Profiles - General Info	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.
Profiles - Resource Profile	RS_RES_PROF_RVW	• Resource Management, Maintain Resource Profiles, Profiles, Resource Profile • Click Resource Profile on any Resource Profile page.	Review consolidated resource profile information in a resumé 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, Areas of Specialty, and Additional Resource Information

Access the Profiles - Overview page.

Note. The Resource Matching process does not use the data that is captured for objective and areas of specialty. It is informational only.

Additional Resource Information

Provide the project Role and the Region code for the resource. This data is initially populated when the resource is established as a Resource Management Resource. You can be update it on this page. Pool Name is a display-only value. In order to change the pool a resource belongs to, a pool manager must transfer the resource from their current pool.

See Chapter 16, "Working with Resource Pools," Managing Pool Resources, page 163.

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 lookup icon.

Type of Specialty

Enter a type:

Category: Specialties of this type represent a broad area of competency, such as managerial experience.

Competency: Specialties of this type represent specific competencies that the resource possesses, such as strategic planning or project management experience.

Worker Specialty

Enter the individual competency or category of competency that the resource possesses.

Delete

Click this button to delete the competency or category from the resource profile.

Add Specialty

Click this button to add additional competencies or categories as specialties.

Maintaining Resource Work Experience

Access the Profiles - Work Experience page.

Note. Resource Matching uses the Work Description field on the Work Experience edit page 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 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 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 this button to modify the work experience line.
Add Work Experience	Click this button to access the Work Experience edit page to enter new or update existing work experience information by adding any Work Information that is not initiated in 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.

Resume Attachment

Click the Add Resume button to add a resumé attachment.

File Name	Click the link to open the resumé document attachment for the resource.
Browse	Click to browse through directories and locate the appropriate resumé 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 resumé document. If there are multiple resumé documents, specify the default for use by the Resource Matching process.
Delete	Click to remove the resumé document attachment from the resource profile.

Maintaining Resource Qualifications

Access the Profiles - Qualifications page.

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 and interest region to access PeopleSoft HRMS in a new browser window using the Single Signon feature. There, you can make modifications, save your changes, and then return to the resource profile in 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 Resource Matching. 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 Resource Management is the employee source database, click an Add/Update link to access the Resource Management pages that you use to modify resource competencies, interests, and accomplishments. This topic is discussed in more detail elsewhere in this chapter.

See Chapter 19, "Maintaining Resource Profiles," Modifying Resource Competencies, Interests, and Accomplishments, page 226.

Maintaining Resource Preferences

Access the Profiles - Preferences page.

Maximum Travel, 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 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 INT values to calculate the Flexible Preference factor. An administrator can modify the INT 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 92.

See *PeopleSoft 8.9 Human Resources PeopleBook: Manage Competencies.*

Add
Click this button to add flexible preference attribute values.

Maintaining Resource General Information

Access the Profiles - General Info page.

You cannot modify address, job information, or passport and visa information on this page; you must update this 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 uses shading to indicate the work 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).

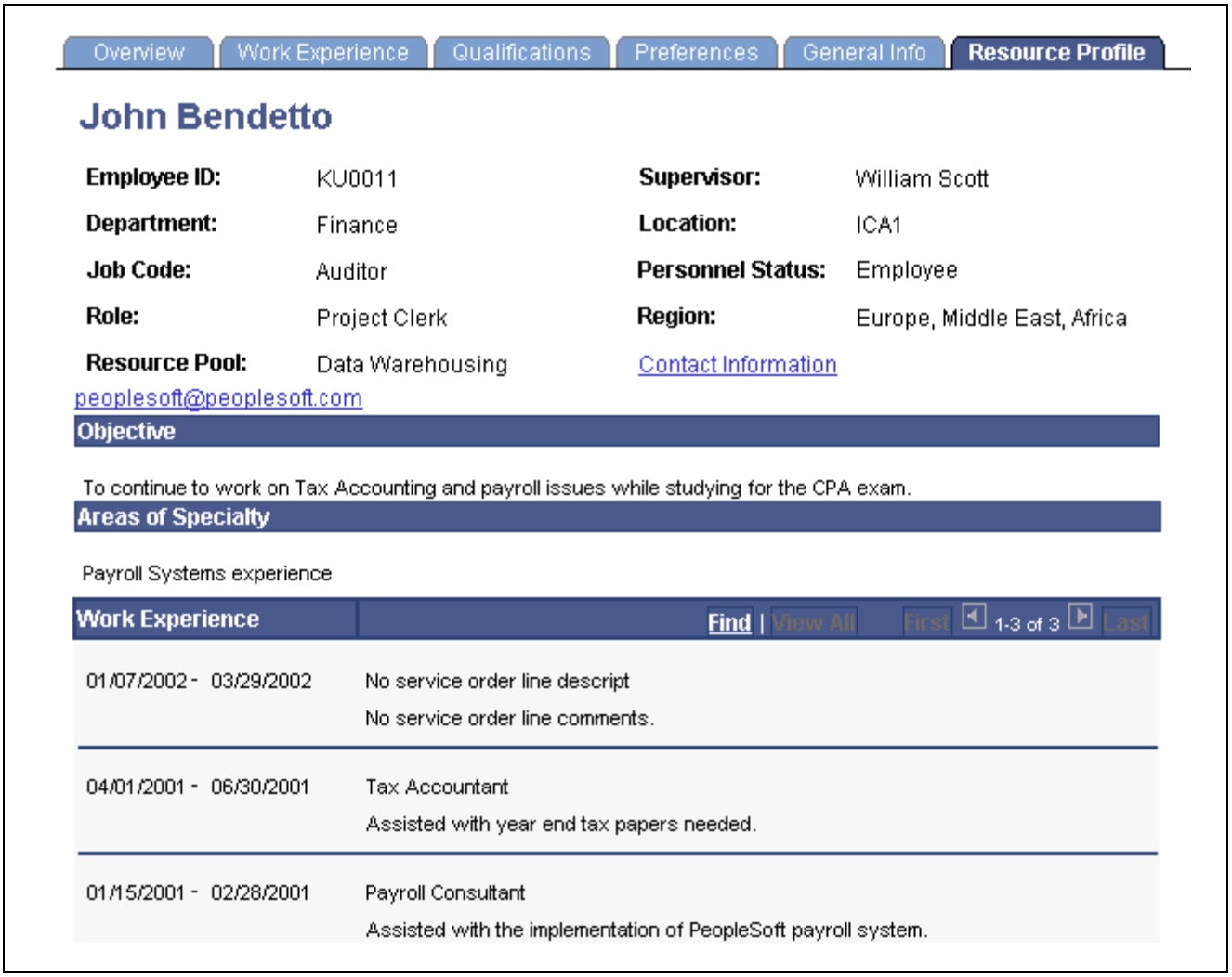
If the organization established a flexible resource attribute, either for use as a flexible qualification factor or for information only, it appears on this page. For example, if there is a flexible attribute called Industry, you can specify the industry expertise.

<Flexible Resource Attribute> Enter or look up the appropriate value for each attribute.

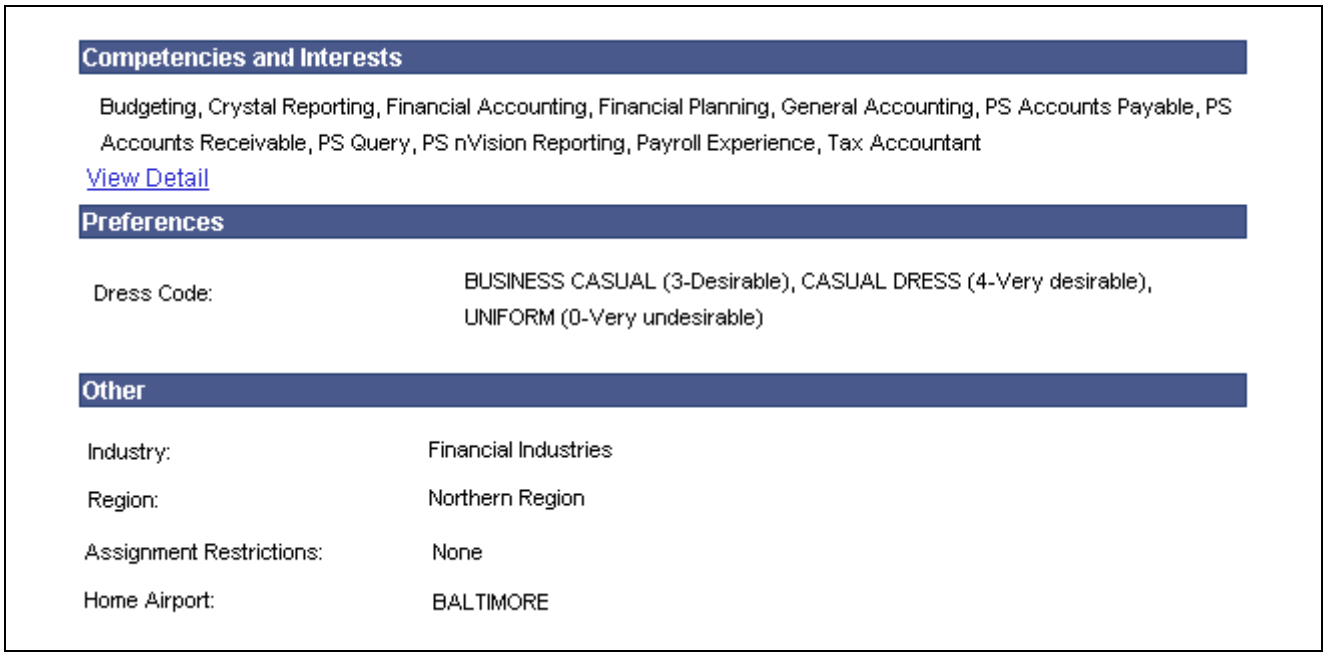
Add Click to add flexible attribute values, if the attribute allows multiple values.

Reviewing Resource Profiles

Access the Profiles - Resource Profile page.



Profiles - Resource Profile page (1 of 2)



Profiles - Resource Profile 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 this link to access the <Resource> - Contact Information page to review address and telephone information from the Profiles - General Info page.

View Detail and **View Summary** Click the View Detail link in the Competencies and Interests or Accomplishments group boxes to view the qualification details. Click the View Summary link to return to the summary view.

Modifying Resource Competencies, Interests, and Accomplishments

If 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 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 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.

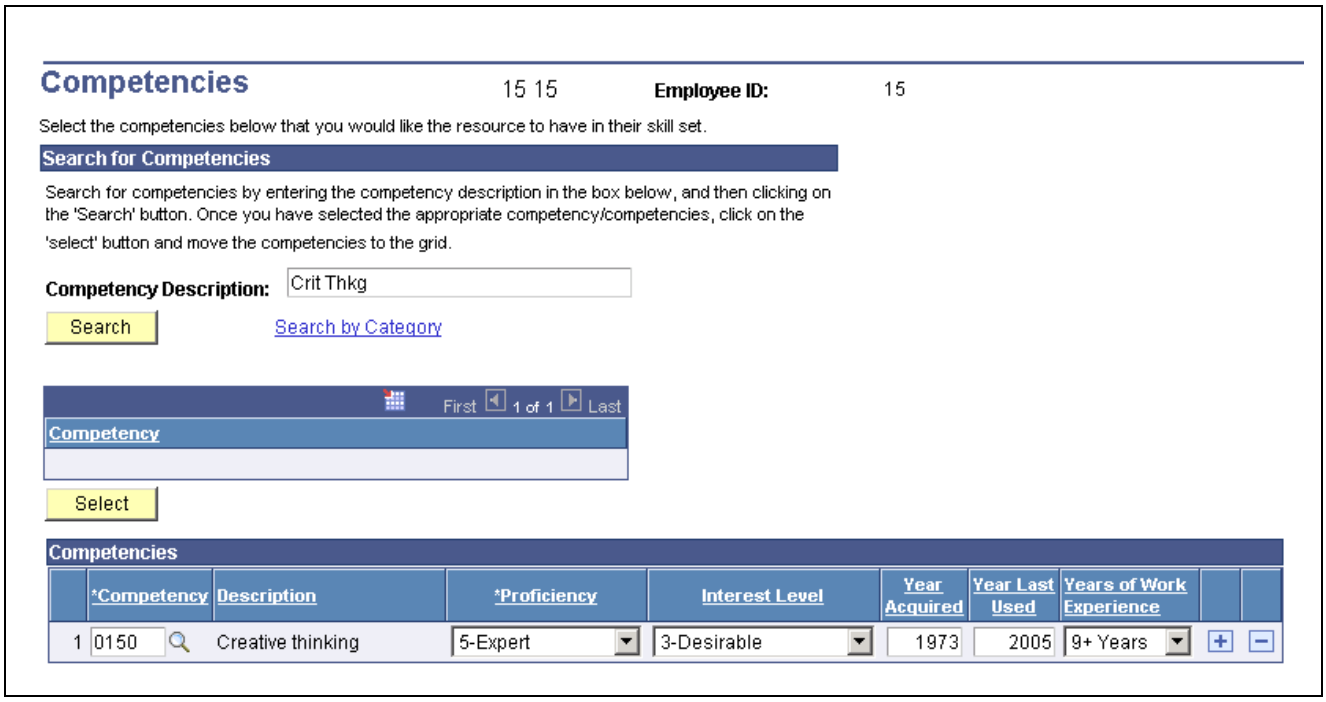
Page Name	Object Name	Navigation	Usage
Languages	RS_CM_LANG	Click Add/Update Languages on the Resource Profile - Qualifications page.	Modify a resource's language information.
Professional Memberships	RS_CM_MEMBR	Click Add/Update Professional Memberships link on the Resource Profile - Qualifications 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.
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.

Note. Competencies are used by Resource Matching.

Use the basic search page to search for a competency by key word or letters. Add, delete, or modify competencies and interests as required.



Competencies page

Search for Competencies

Competency Description Enter characters from the competency description. For example, *World Banking* can appear as a search result if you enter *Bank.*

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 the Search by Category link 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 Resource Matching 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.

Note. The Resource Matching process uses the education information.

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.

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.

Note. Resource Matching uses the license and certificate information.

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.

Note. Resource Matching uses the language information.

Enter the appropriate field values, select the appropriate check boxes (Native, Translator, and Teacher) as applicable, 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.

Note. Resource Matching uses the Professional membership information.

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.

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.

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 8.9 Human Resources PeopleBook: Manage Competencies.*

CHAPTER 20

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. Resource Matching uses schedule data to calculate the availability of a qualified 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 non-assignment 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 non-assignment 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.
- Holidays.
- Notification messages.

Prerequisites

Before you work with resource schedules, you must:

- Define resource schedule options.

  See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Setting Up Resource Management Installation Options.

- Define task categories.

  See Chapter 14, "Enabling Resource Schedules," Defining Task Categories and Mapping to TRCs, page 143.

- Define holidays.

See Chapter 14, "Enabling Resource Schedules," Defining Holidays on Resource Schedules, page 146.

- Establish eligible resources.

  See Chapter 13, "Establishing Resources," page 127.

Task Categories

Every entry in a resource schedule is associated with a task category. Task categories are used in Resource Matching and in Resource Management reports. Most of the task categories are predefined in 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 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.

- *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.

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 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 - Resource Search	RS_SCHED_MONTHSRCH	Resource Management, Maintain Schedules, Monthly Schedules	Search for
Monthly Schedule	RS_SCHED_MONTH	• Resource Management, Maintain Schedules, Monthly Schedules • Resource Management, Maintain Schedules, My 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 numeric 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 half-hourly increments.
Weekly Schedule	RS_SCHED_WEEKWIDE	Click the This week link 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 page

The first two schedule entries for each day appear on the page.

To manage schedules using the Monthly Schedule page:

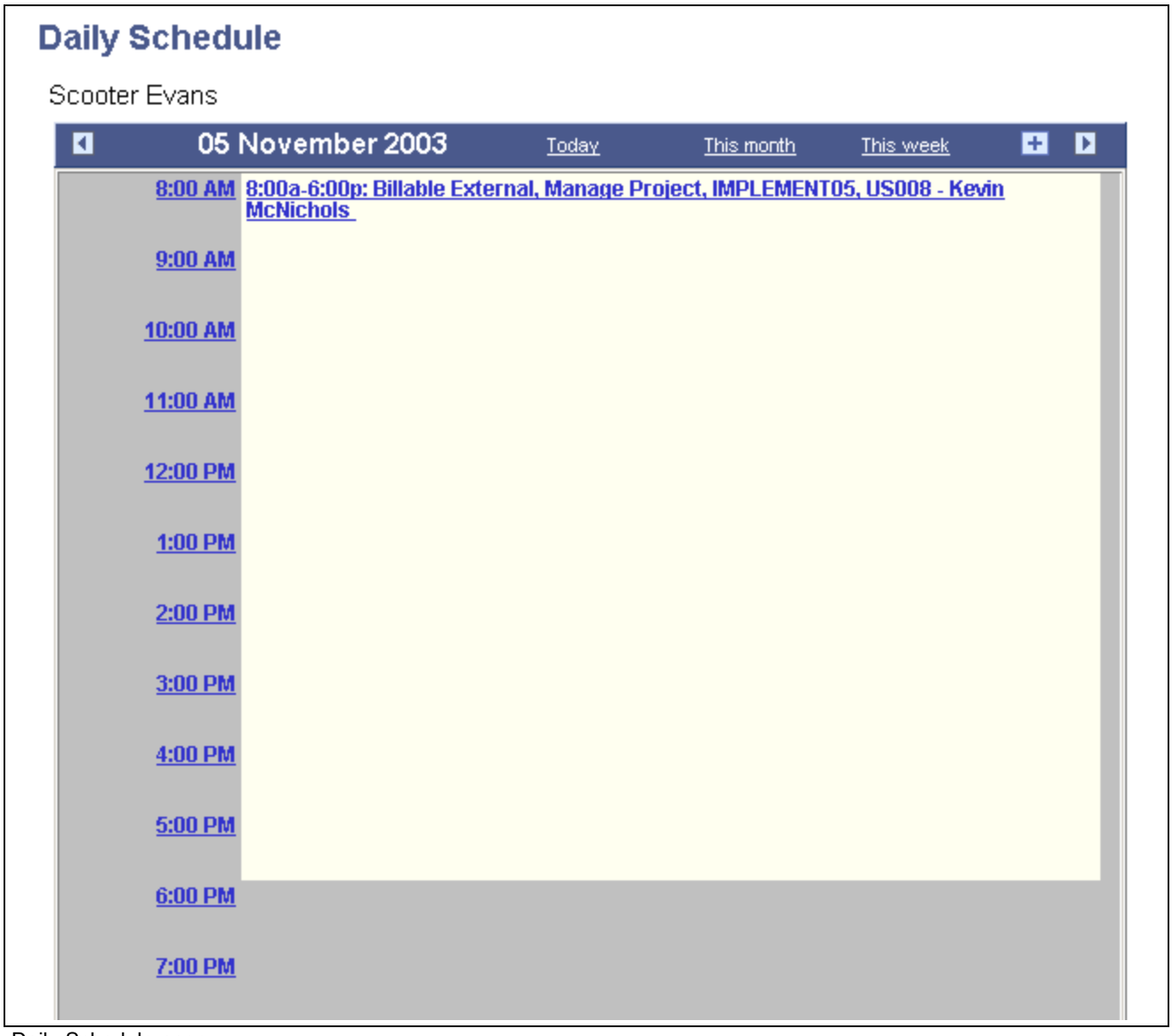
- Click the arrow indicators to navigation to the next or previous month or year.
- Select a specific month and year to jump to a different period.
- If there are no schedule entries for a day, click the date link to access the Appointment Details page and create a new appointment.
- If there are schedule 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 cannot be modified from the resource schedule.

Daily Schedule

Access the Daily Schedule page.



Daily Schedule page

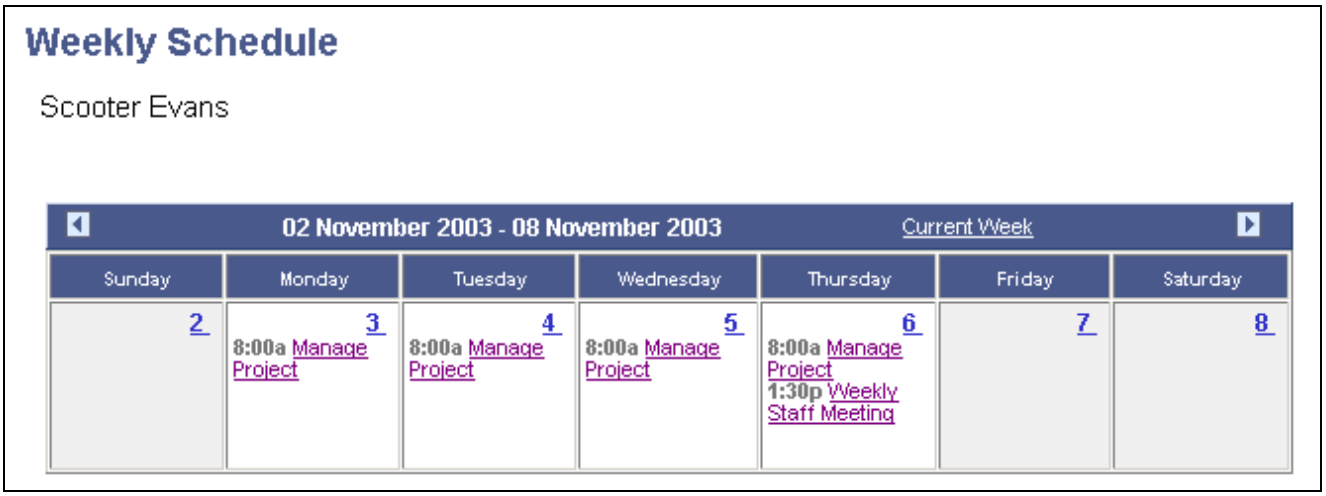
The daily schedule provides a quick overview of tasks for a given day in half-hourly increments. Tasks include a description of the actual task start time, end time, and activity information. Multiple tasks within the half hour appear in order of start time. Highlighting indicates when a task overlaps with another task in a given time period.

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 time 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 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

Access the Monthly Schedule page.

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:

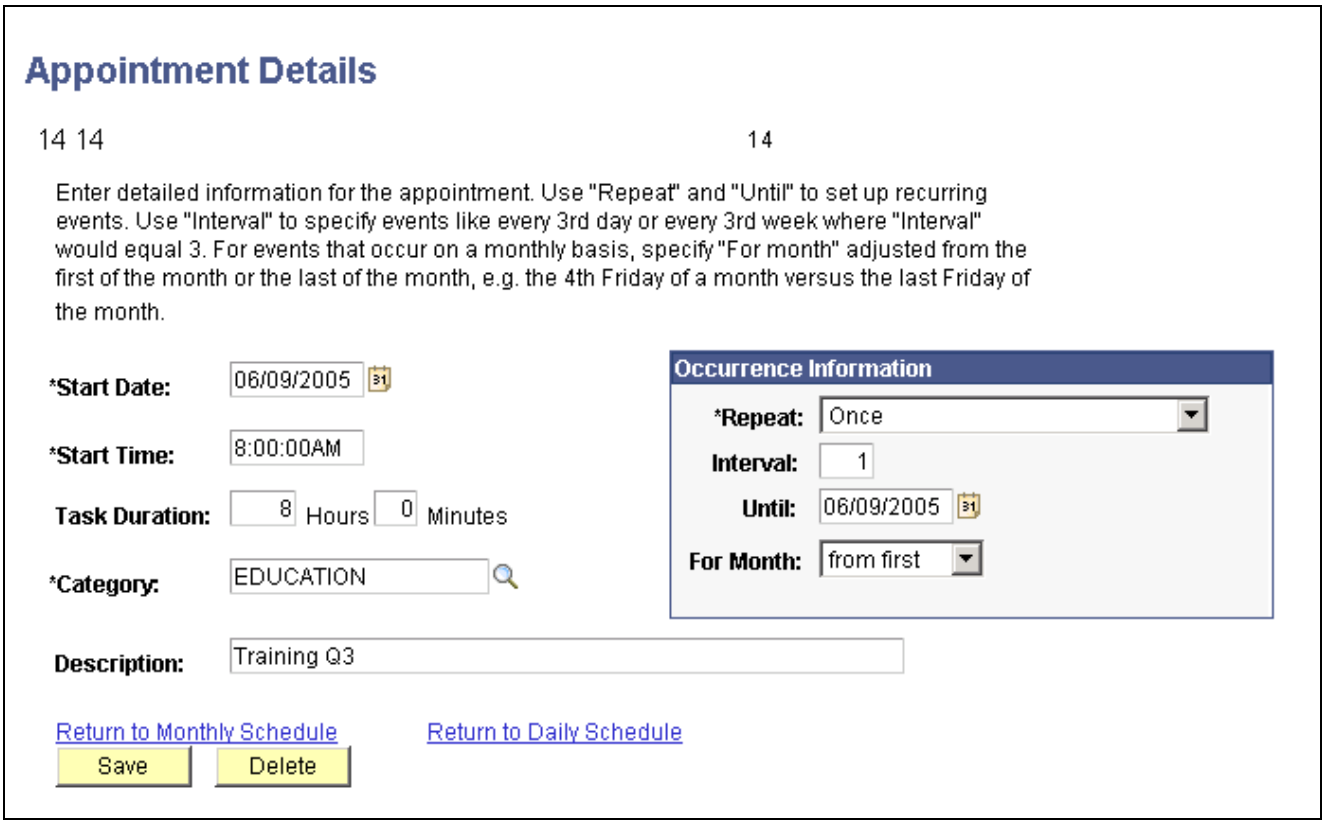
- Enter appointment details.
- Send a schedule change notification.
- View assignment information.

Pages Used to Schedule Appointments

Page Name	Object Name	Navigation	Usage
Appointment Details	RS_SCHED_APPT	• Resource Management, Maintain Schedules, Monthly Schedules, Monthly ScheduleClick a numeric date link on the Monthly Schedule page. • Resource Management, Maintain Schedules, My Monthly Schedule, Monthly Schedule Click the date link on the Monthly Schedule page. • Click a numeric date link on the Monthly Schedule page. • Click a time 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 in the Maintain Schedules component.	View or modify assignment details.

Entering Appointment Details

Access the Appointment Details page.



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.

Task Duration Enter the number of Hours and Minutes per day that the resource spends on the appointment.

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

Access the Daily Schedule page.

Conflicting events are highlighted on the Daily Schedule page.

Sending a Schedule Change Notification

Access the 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 21, “Assigning Resources,” page 245

CHAPTER 21

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, 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, 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 Resource Management Business Unit Options, page 52

Assignment Processes

You can use any of these methods to create an assignment in Resource Management:

- Create a direct assignment when you already know the appropriate resource to fulfill a requirement and you do not 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.
- Initiate a generic resource request for an upcoming project, and create assignments for the request.

Assignment Statuses

The assignment status controls much of the workflow within 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 Resource Management, and project resource lists in 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 *Assign* you can: • Select the *Assign* status on the Assign Resource page. • Select the *Assign* action on the Staffing Workbench. • In Program Management, select the *Requested* resource status on the Resources page. If approval workflow is not enabled , then the resource status will change to *Committed* upon saving the page. **Note.** If approval workflow is required, the *Assign* status value changes to *Pending Approval* until the assignment has completed the approval workflow. In Program Management, choosing *Requested* and saving the page will trigger assignment 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 *Assign* are canceled.

Assignment Status	Description	Triggers These Actions
Cancel	The assignment is canceled. To change the status to *Cancel* you can: • Select the *Cancel* status on the Assign Resource page. • Select the *Cancel* action on the Staffing Workbench. • In Program Management, select the *Cancelled* resource status 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 *Assigned* are automatically canceled. • If you close a resource request, the outstanding assignments for the resource request that are not yet *Assigned* 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 cancellation occurs after the assignment schedule start date but before the schedule end date, Resource Management assignment status is set to *Cancel* as of the date of the cancellation. • If the cancellation occurs before the assignment schedule date, the assignment is canceled in Resource Management. • If the cancellation occurs after the assignment schedule end date, the Resource Management assignment status does not change. 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 *Assigned* 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 *Complete* you can: • Select the *Complete* status on the Assign Resource page. • Select the *Complete* action on the Staffing Workbench. • In PeopleSoft Program Management, select *Complete* from the Resource Status drop-down list box 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 user changes the Resource Status to *Complete* for an assignment that is in process, the assignment status changes to *Complete.* • If transactions exist for the resource on the project, the assignment status changes to *Complete.*
Interview	The resource is interviewing for the assignment. You can change the status to *Interview* 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 *Assign* and approval workflow is required, the assignment is automatically placed in a status of *Pending Approval* until the manager approves or rejects it. In Program Management, on the Resources page, the Resource Status will be *Requested* if approval workflow is required.	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 *Pending Approval* status, the system will not allow any more assignments in an *Assigned* or *Pending Approval* status.
Propose	The resource is proposed for the assignment. You can change the status to *Propose* 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 *Reject* during workflow processing when you reject the assignment on the Assignment Approval page. In Program Management, on the Resources page, the Resource Status will be *Rejected* if the assignment request was not approved.	This status updates the resource request and resource schedule.
Reserve	The resource is reserved for the assignment. To change the status to *Reserve* you can: • Select the *Reserve* status on the Assign Resource page. • Select the *Reserve* action on the Staffing Workbench. **Note.** If a project is in a processing status of *Pending,* the system does not reserve resources on the Project Resources page. You can choose to *consider* resources (which will not generate a Resource Management assignment), or actually assign resources by designating them *Committed,* which does create a Resource Management assignment, with a status of *Assign.*	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
Canceled	None

Current Assignment Status	Available Assignment Statuses
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 and minutes 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.

If you use PeopleSoft Asset Lifecycle Management (ALM), Resource Management provides four API's to enable ALM to create assignments within Resource Management for labor resources and tools.

Note. PeopleSoft does not support the creation of direct assignments for ALM resources using the Assign Resource Page.

Assignment Workflow

You 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.

  Note. You must specify which roles must approve assignments: the pool manager, the project manager, or both. If you specify that both the pool manager and project manager must approve assignments, you must also specify which role approves the assignments first. If you are using resource pools, we recommend you make the pool manager the approving manager (the role that approves the assignments *second*).

  If project manager assignment approval workflow is enabled, a resource cannot be assigned to a project without a project manager being assigned to that project. You designate the project manager on the Resource Details page in the Project Resources component.

  See *PeopleSoft Enterprise Program Management 8.9 PeopleBook*, "Scheduling and Managing Resources".
- 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, if you select Supervisor instead of Pool Manager in the Manager Approval Options group box on the Resource Management Options page, you must enter a manager 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, Assign Resource • 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.
Assign Resource - Attach Service Order	RS_ASSGN_SOLOOK	Click the Create Link to Service Order link on the Assign Resource page.	Associate assignments with existing service orders and resource request line numbers.
Assignment Dates in Conflict	RS_ASSGN_DTS	Click the View Conflicts link on the Assign Resource page.	View dates on resources' schedules that overlap assignments.

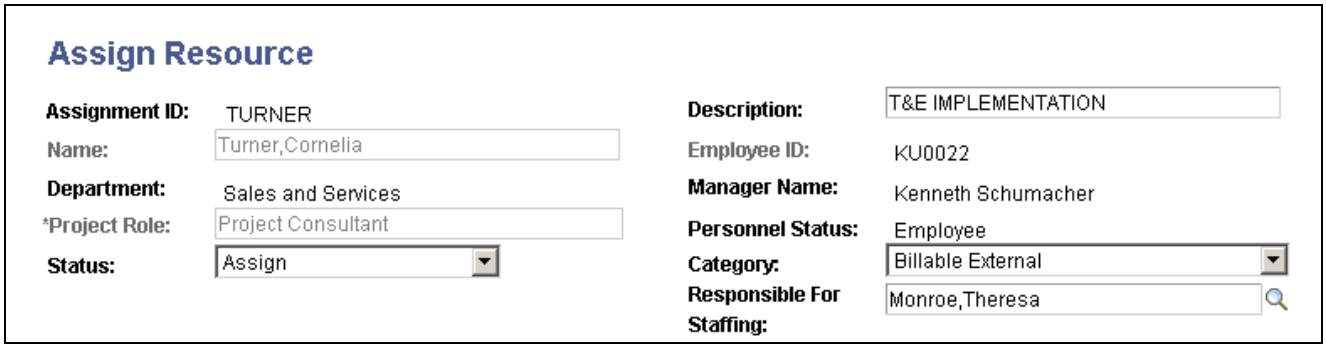
Page Name	Object Name	Navigation	Usage
Assign Resource - Schedule Chart	RS_ASSGN_GRPH	Click the View Schedule Chart link on the Assign Resource page.	View resource schedules in a bar chart format.
Assign Resource - Assignment Status	RS_ASSIGN_HISTORY	• Click the Status History link on the Assign Resource page. • Change the assignment status to *Cancel* or *Complete.*	Enter new assignment statuses and effective dates, and view the assignment status history or change assignment status.
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 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 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 *New Assignment For Approval.* • 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 on this page, if required.

Creating Assignments

Access the Assign Resource page.



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 *NEXT* 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 *Employee* or *Non-Employee.*

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 *Reserve* or *Assign.* You cannot change the project role for assignments in an *Assign* status.

Status Enter the assignment status. Available values are based on the current status of the assignment. The default value is *Assign.*

If you select a status of *Assign* and approval workflow is required, the assignment is automatically placed in a status of *Pending Approval* until it is approved or rejected.

If you assign a resource to a pending project in PeopleSoft Program Management, the resource status is *Reserve.*

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 *Assigned,* or modify the status of an existing assignment from any status to *Assigned.*

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 Resource Matching calculation of the Availability fit score. Each task category is assigned a flexibility percentage, which is used in Resource Matching to identify how easily a task of that category can be rescheduled.

The default value is *Billable External.*

This field is required to save an assignment in a status of *Reserve* or *Assign.*

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.

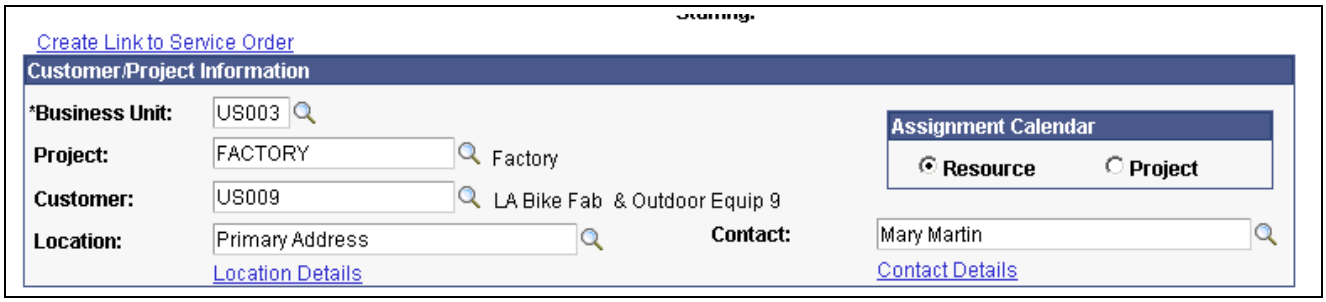
Create Link to Service Order or **Service Order: <service orderID/resource request ID>** Click the Create Link to Service Order link to associate this assignment with an existing service order and resource request line. Available values are based on the project business unit.

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 and project information on the Assign Resource page

Assignment Calendar

Select Resource or Project to have the default calendar for the assignment either be from Resource Management or from Project Costing. The system displays appropriate information in the Schedule Detail Dates group box according to the calendar selected.

- Resource: Select to have the Hours field in the Schedule Detail Dates group box be based on the resource's standard hours as specified in the employee's job information.
- Project: Select to have the Hours field in the Schedule Detail Dates group box be based on the project's hours per day as specified in the Program Management defaults.

For example, if a resource's calendar indicates that the resource works Monday and Tuesday, the Project Costing calendar will be for Wednesday, Thursday, and Friday. Depending on your calendar selection, the resource's schedule and schedule details will populate on the assignment.

Note. This group box only displays if you have Program Management installed.

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 125.

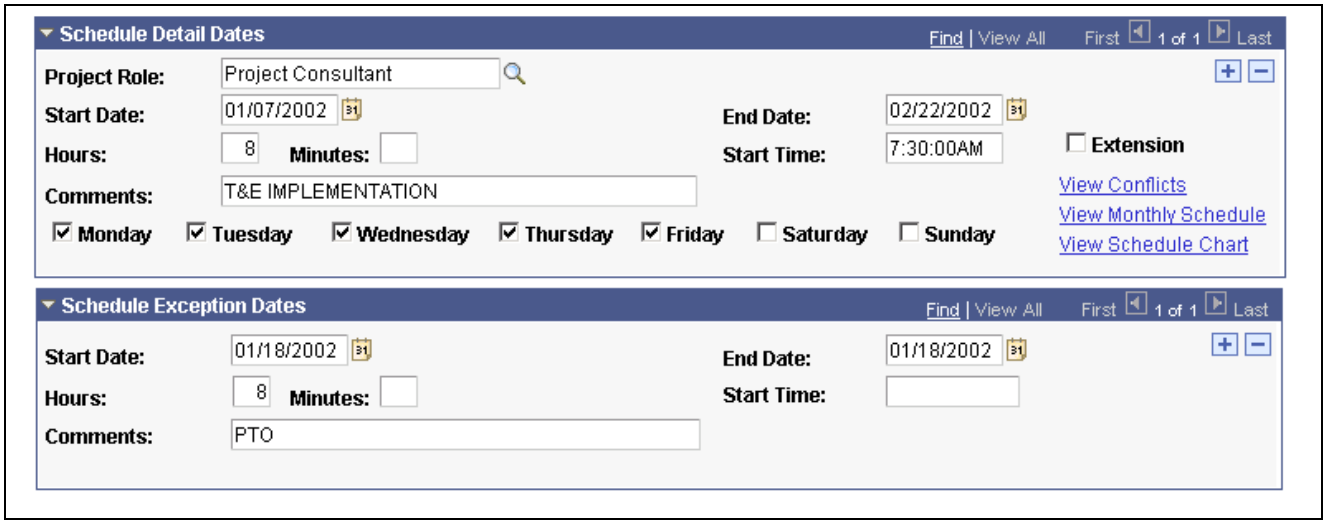
Contact Enter the customer contact for this assignment.

See Chapter 12, "Establishing Customers," Working with Customer and Contact Profiles, page 124.

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.



Schedule information on the Assign Resource page

Project Role Select a project role for the assignment. When the assignment is first created, the project role on the first schedule is the same as the role specified at the assignment header. All schedules must have the project role defined.

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.

Hoursand**Minutes**

Enter the hours and minutes 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).

However, if Program Management is installed and you select Project in the Assignment Calendar group box, the Hours field is based on the project's Hours Per Day as defined on the Project Definitions - Program Management page in the Project Definitions component of Program Management. The working days are based on the Project Calendar specified for the project on the same page.

Tasks that are equal to the number of hours and minutes that are 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.

End Time

The end time of appointment for the day will be calculated and displayed in this field.

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.

Note. 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.

View Monthly Schedule

Click to view a resource's monthly schedule and assignment details for the appropriate calendar as selected in the Customer/Project Information group box.

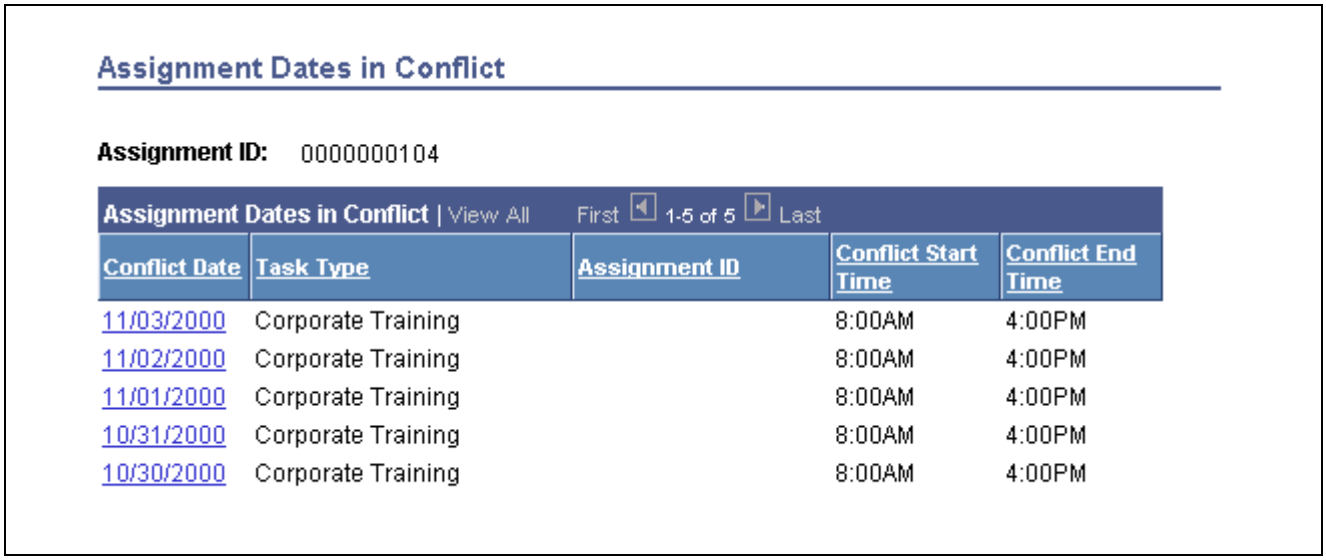
View Schedule Chart Click to view a vertical bar chart representing the resource's work load and availability by day.

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.



Assignment Dates in Conflict

Assignment ID: 0000000104

Assignment Dates in Conflict | View All First 1-5 of 5 Last

Conflict Date	Task Type	Assignment ID	Conflict Start Time	Conflict End Time
11/03/2000	Corporate Training		8:00AM	4:00PM
11/02/2000	Corporate Training		8:00AM	4:00PM
11/01/2000	Corporate Training		8:00AM	4:00PM
10/31/2000	Corporate Training		8:00AM	4:00PM
10/30/2000	Corporate Training		8:00AM	4:00PM

Assignment Dates in Conflict page

When you click View Conflicts on the Assign Resource page, this page appears only 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.

Conflict 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.

Conflict Start TimeConflict End Time Displays the specific times for the conflict.

Schedule Exception Dates

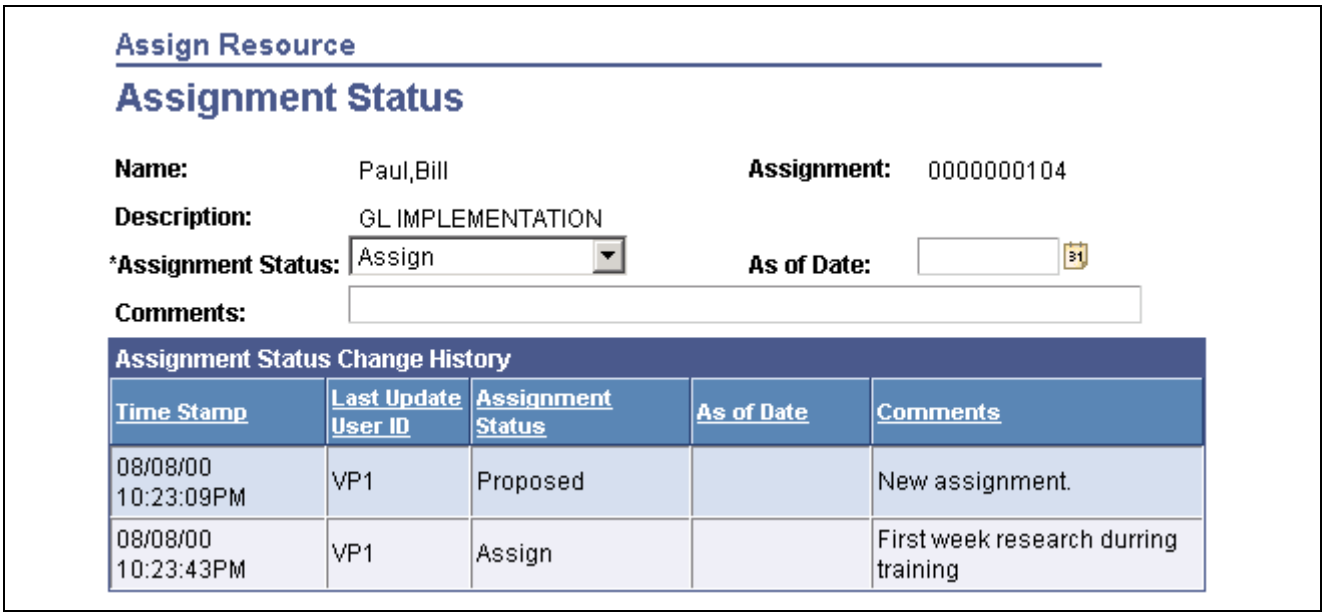
Use this feature to specify breaks in the assignment schedule, such as a scheduled vacation, or a period of time during the project when the resource is not needed on the assignment. Enter the dates, hours, and time that the resource will not work on the assignment. Add comments to explain breaks in 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 page

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

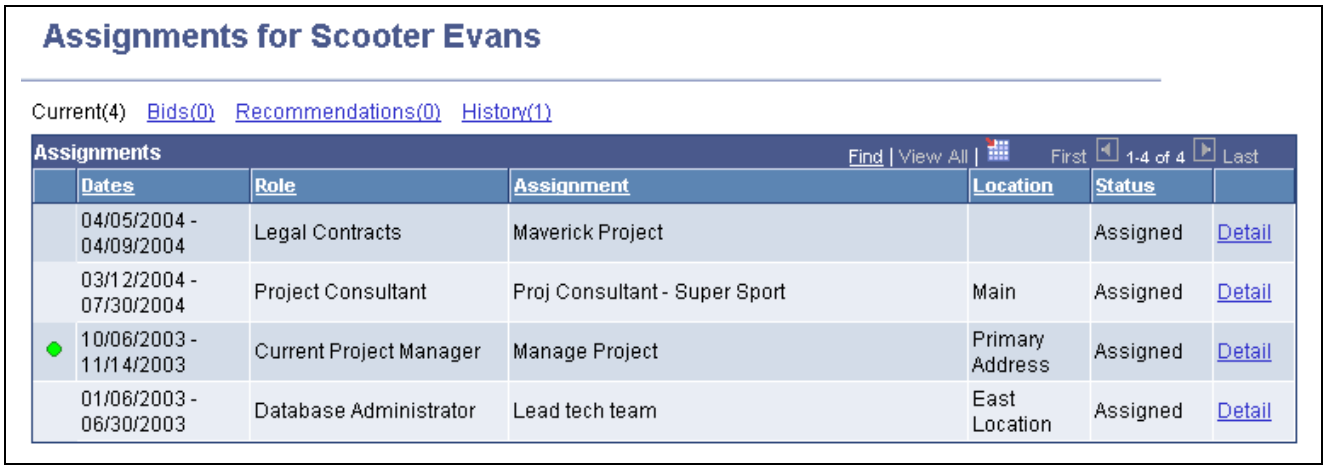
The Assignment Status Change History group box reflects changes in status by adding a new row of data for each status change on the assignment. This group box lists your complete assignment status history in descending chronological order.

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 this link 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 this link 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 this link 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 this link 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.

A green diamond indicates that 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.

This icon indicates that 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.

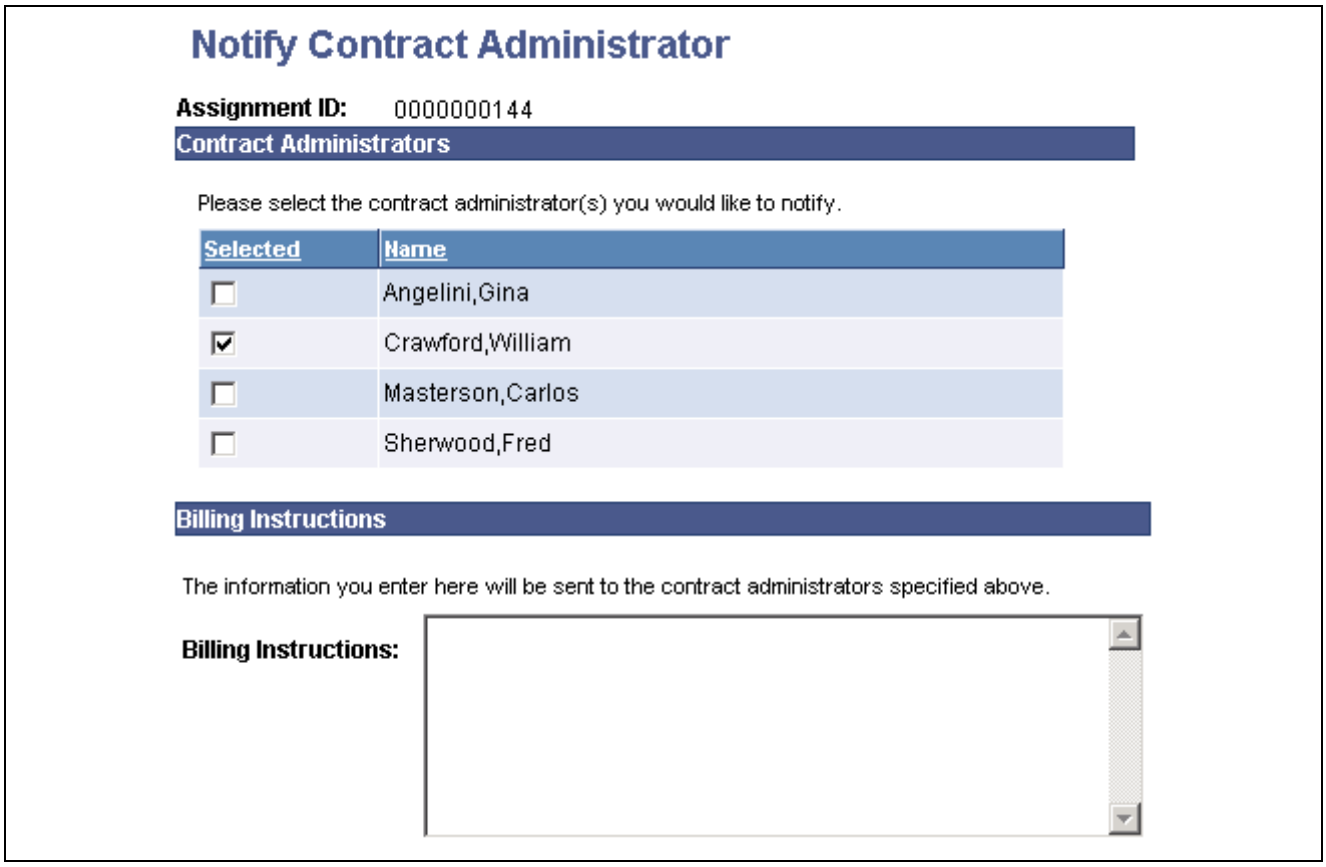
Click in the Bids filter or Recommendations filter to access the Job Detail page and review information about the service order and resource request. To return to the Assignments for <Resource> page, click Return to Resource Assignments.

Note. The destination of the Detail link changes based on your active filter.

See Chapter 28, "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 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.

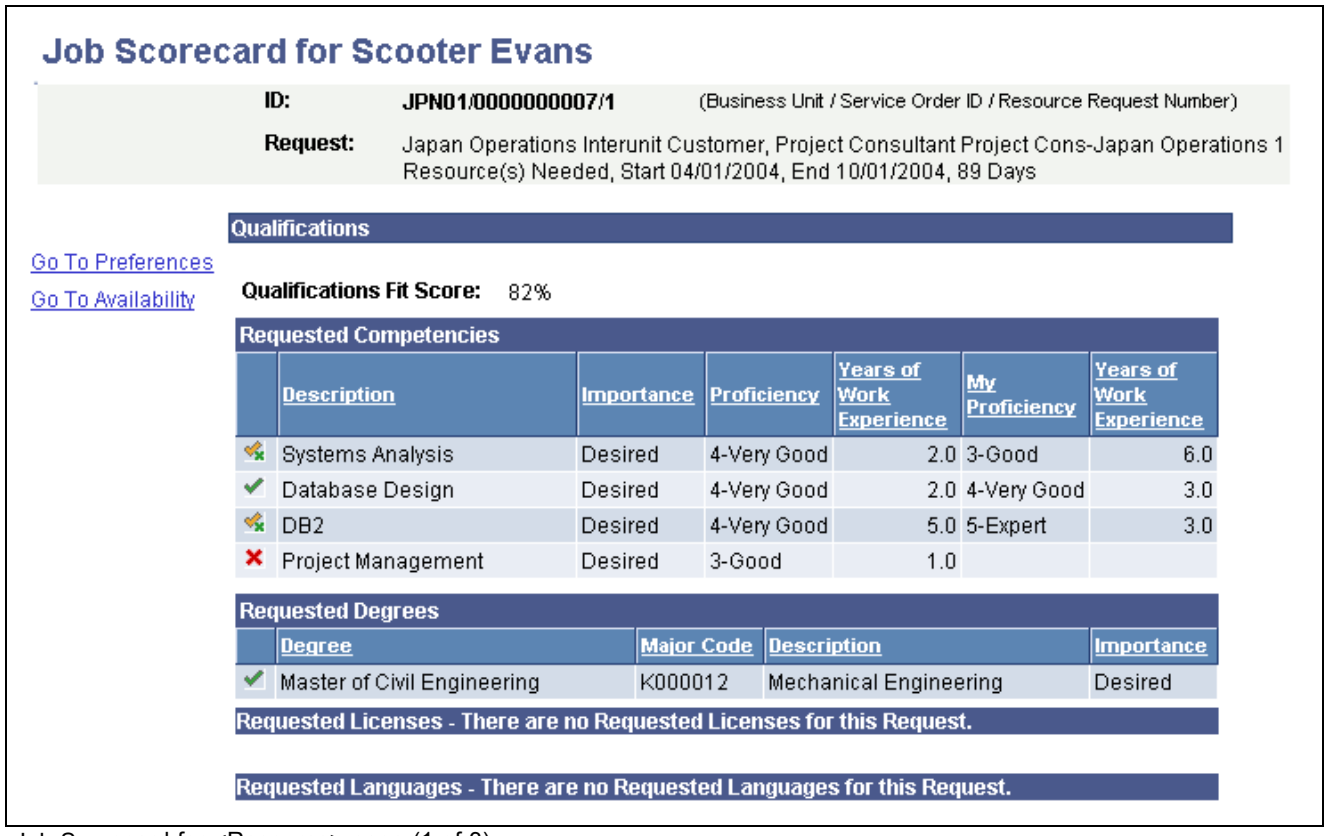
See Also

Chapter 20, “Maintaining Resource Schedules,” Working with Resource Schedules, page 235

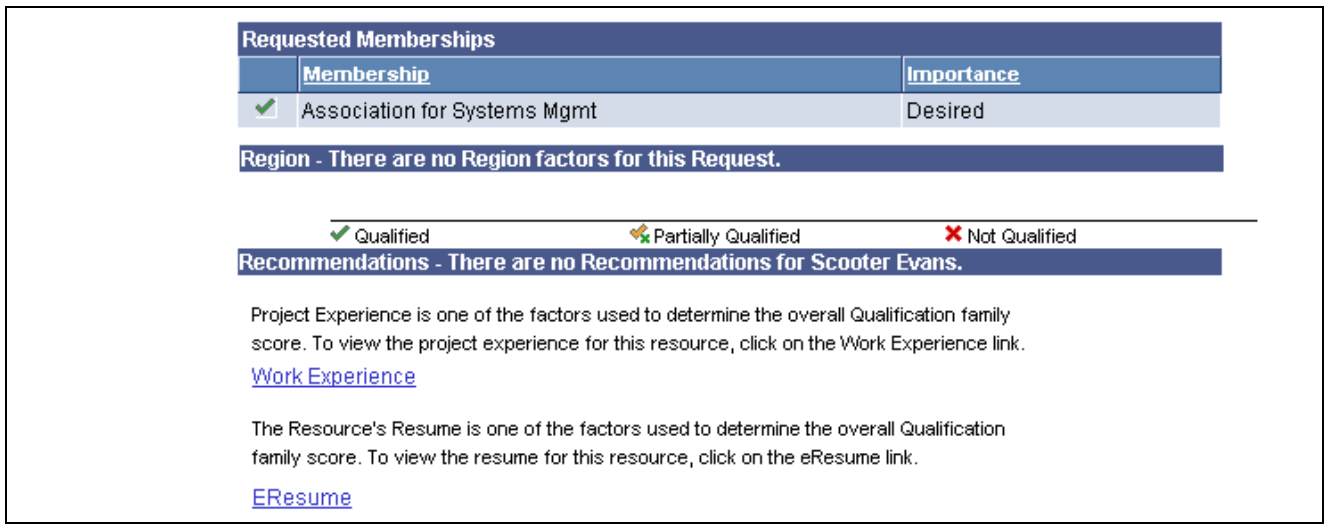
PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up Resource Management Installation Options

Viewing the Job Scorecard

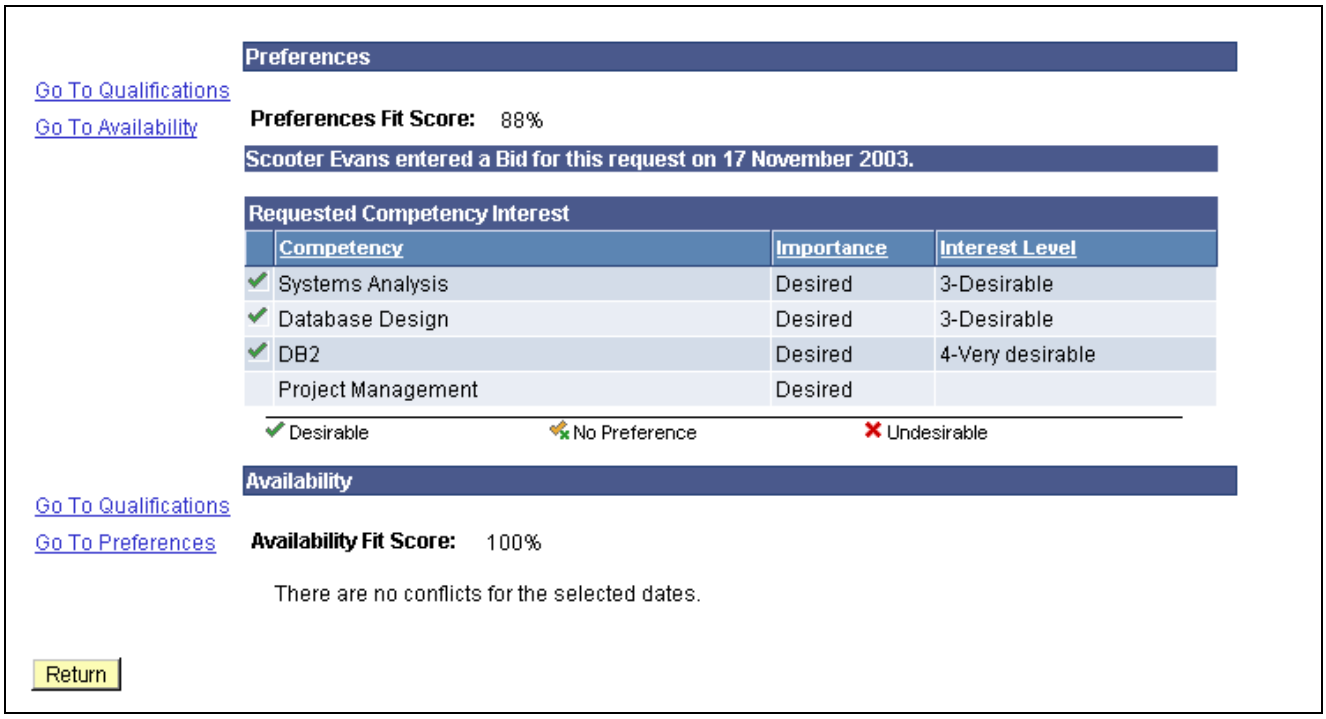
Access the Job Scorecard for <Resource> page.



Job Scorecard for <Resource> page (1 of 3)



Job Scorecard for <Resource> page (2 of 3)



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, a green check mark 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, a yellow check mark with a green *x* 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, a red *x* 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 this link to access the Work Experience page on the resource profile.

EResume Click this link to access the resource's resume document attachment.

Preferences This group box displays the preferences score and lists each specified qualification. Indicates if the qualification is desirable or undesirable, or if the resource has no preference. It also includes bids and flexible preference factors.

Availability This group box 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 Click this button to return to the page where you accessed the Job Scorecard.

Note. The Qualifications, Preferences, and Availability scores represent the actual scores of the resource for the request. If you accessed this page from the Staffing Workbench, Pool Manager Workbench, Express Search, or the Job Spy, the scores that appear on these pages may vary from the Job Scorecard scores. The scores displayed on these pages are based on the Search Settings that were used and may vary depending on the relative weights you place in the settings.

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 Program Management

If you use 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.

Note. If two levels of approval are required, then on first approval, the status does not change to *Assign,* it stays at *Pending Approval.* Only after the second approval does the status of the assignment change to *Assign.*

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 *Assign.*
Reject	Click to change the assignment status to *Reject.*

Approving Assignment Schedule Changes

During implementation, you specify on the Resource Management Options page whether assignment schedule changes require the resource manager's approval, the project manager's approval, or both, as well as which of those managers must approve first.

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 schedules 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 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 *Date Change For Approval.* • Log in as a resource manager and access the Assign Resource page. Resource Management, 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 22

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 or resource pool to consider, the Verity search engine goes to work. The process compares the resource profiles for all members of the resource group or pool 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 17, "Enabling Resource Matching and Cache Processes," Establishing Resource Groups, page 175.

- 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 17, "Enabling Resource Matching and Cache Processes," Understanding the Verity Search Index, page 187.

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.

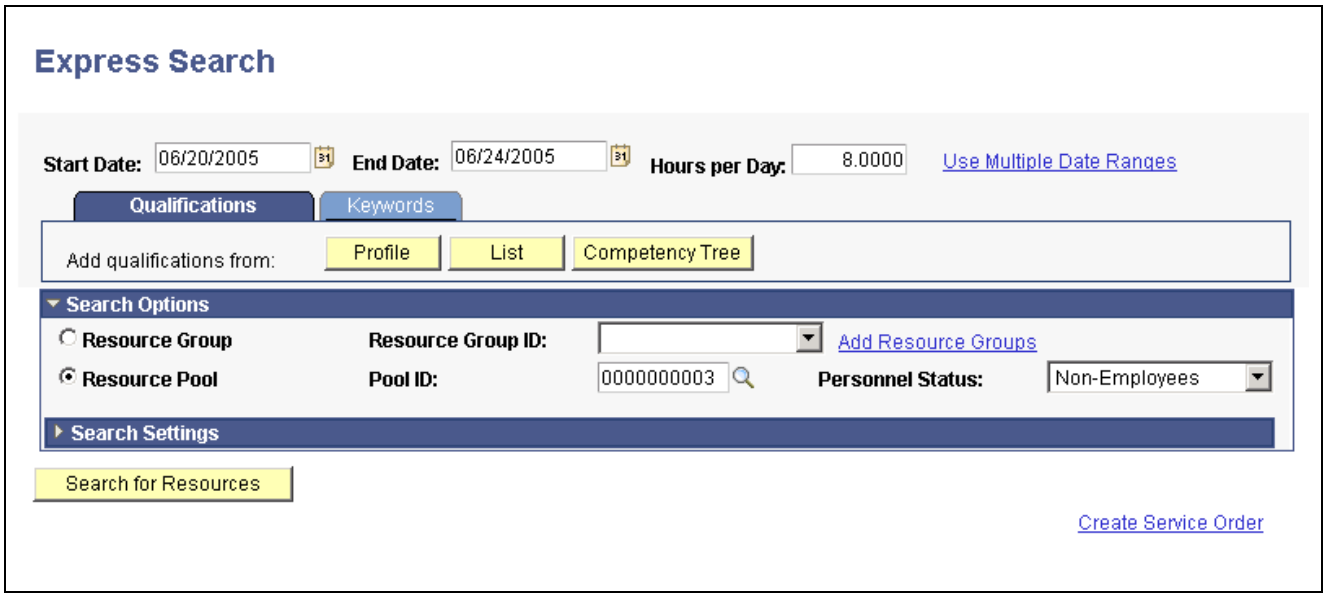
Pages Used to Express Search For Resources

Page Name	Object Name	Navigation	Usage
Express Search	RS_EXPRESS_SEARCH	• Resource Management, Express Search • 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.
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.

Page Name	Object Name	Navigation	Usage
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.



Express Search page

Start defining search criteria by entering the project start and end dates as well as the number of hours per day. 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 Program Management, this information populates the Express Search page from the generic resource:

- Start and end date.
- Hours per day.
- Qualifications, if the generic resource project role is associated with a qualification profile in 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 Program Management, start and end dates are populated from the generic resource schedule.

Hours per Day — Specify a particular number of hours per day to narrow your search.

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.

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.
Hours per Day	Specify a particular number of hours per day to narrow your search.

Specifying Qualifications

Select the Qualifications tab.

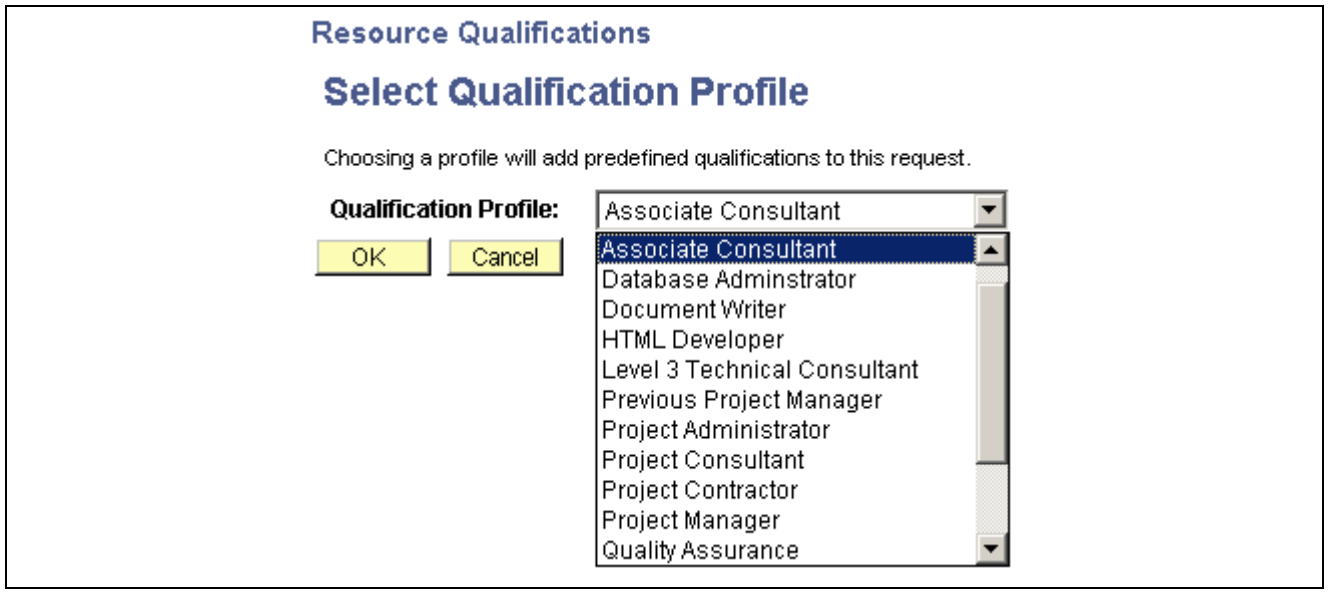
Specify the accomplishments, competencies, and flexible qualification factors that define the resource qualification requirements.

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.

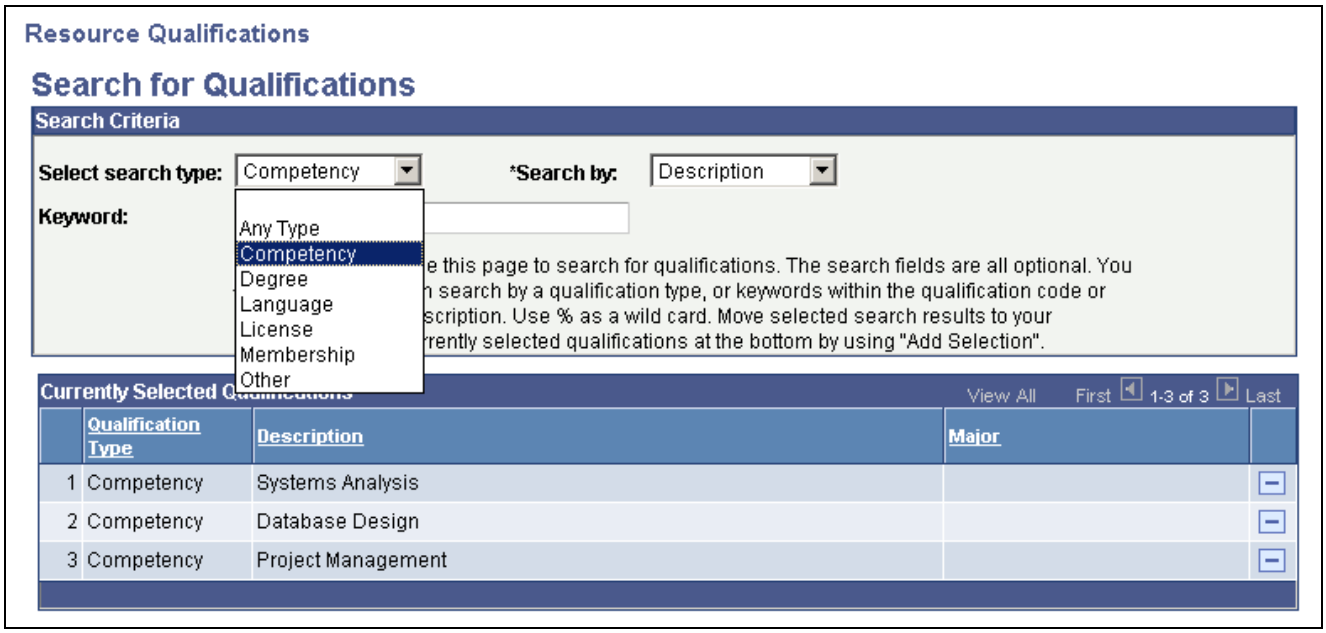
Qualification Profile	Select a qualification profile that closely matches your requirements.

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 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:

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:

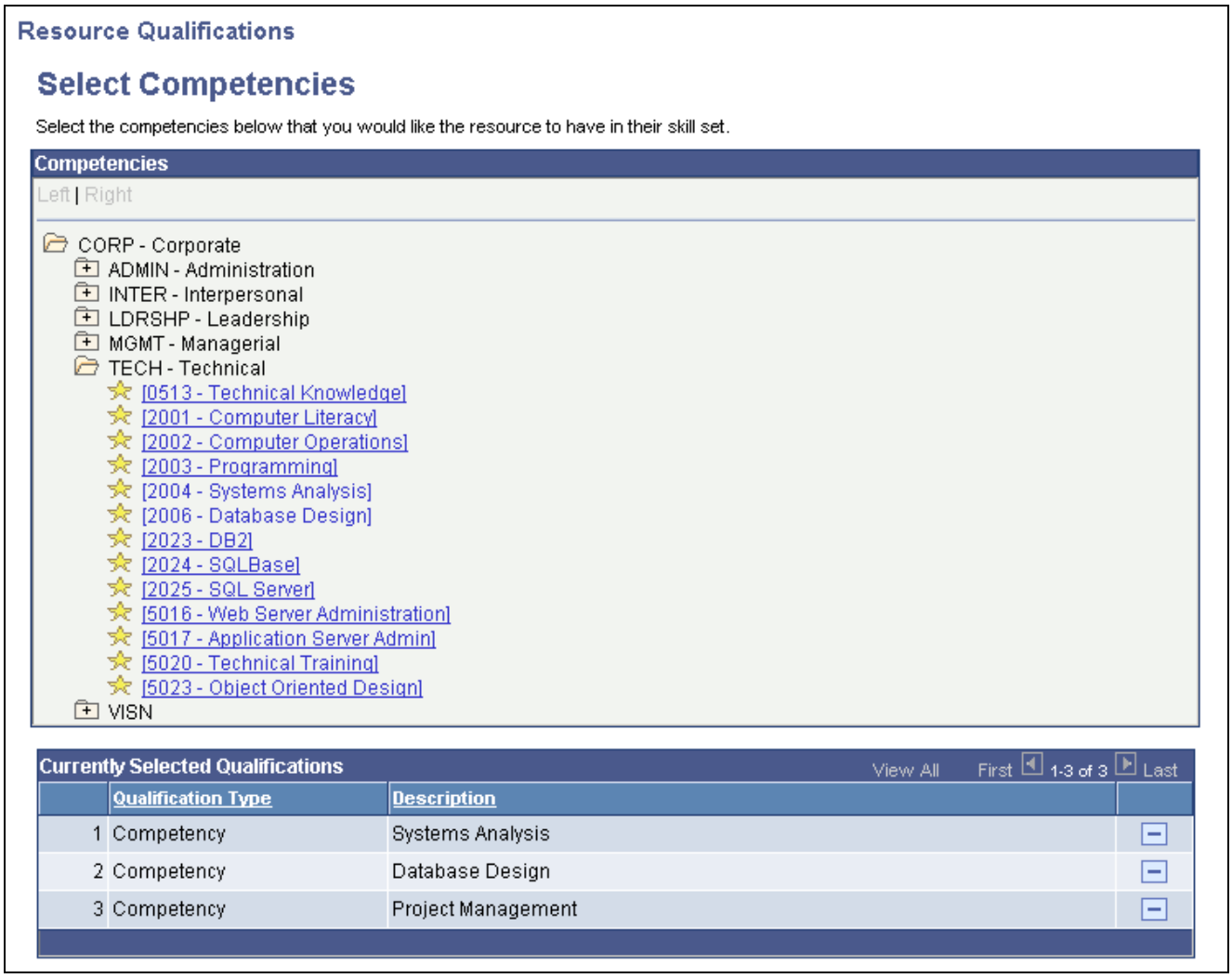
Description: Searches for a keyword within the qualification description.

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 this button 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 group box with the selected competencies, accomplishments, and flexible qualification factors.

Competency Tree

Access the Resource Qualifications - Select Competencies page.



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.

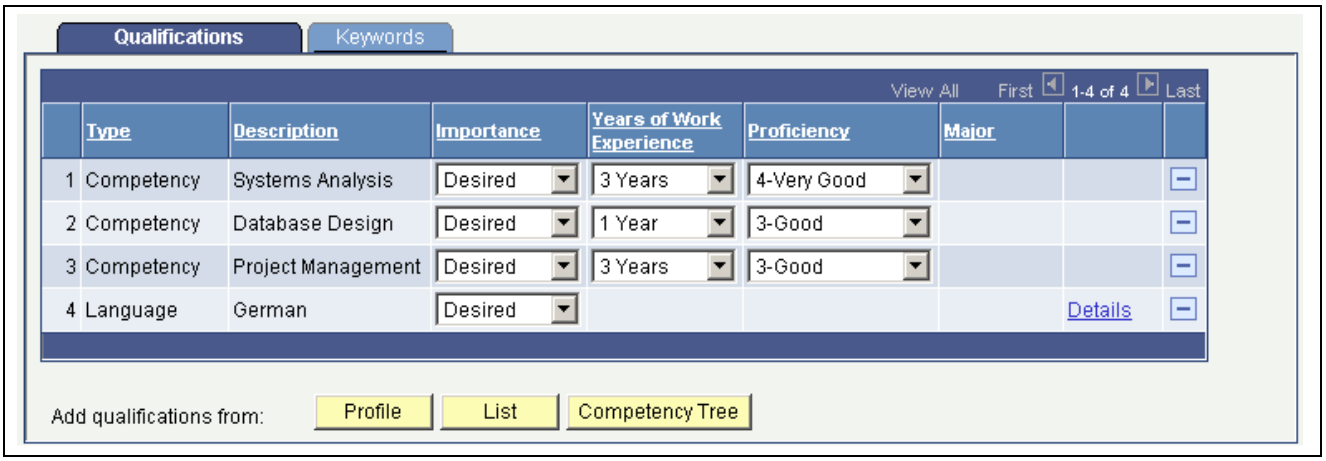
Specific qualifications that you selected previously during this Express Search session appear in the Currently Selected Qualifications grid.

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 group box.



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.

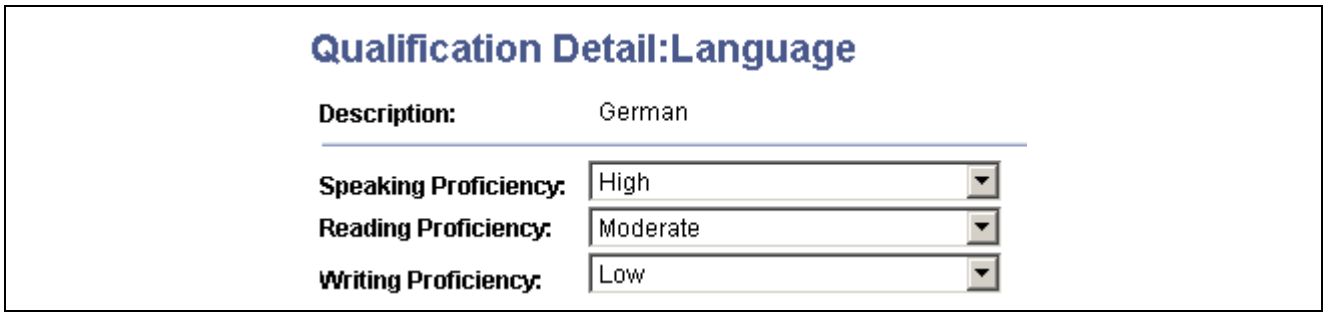
If you select an importance of *Required* for this competency, resources who do not meet the specified proficiency are not returned in the search results.

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 Detail: <Qualification> page.



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.*

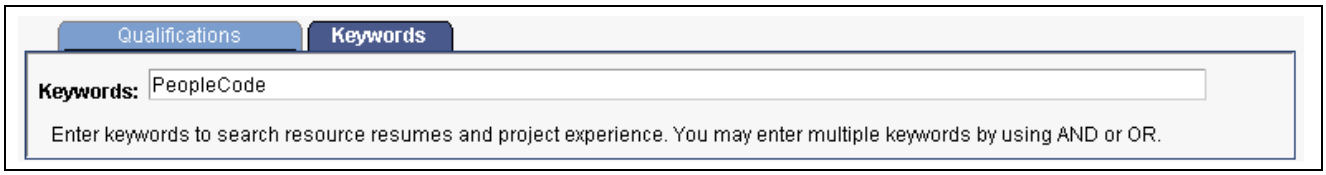
Country and **State** — These fields appear only for license qualifications. Select the Country and State of the license.

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.



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 enable you to direct the search to a specific group of resources based on organization unit value or supervisor.

Resource Group and **Resource Pool** — Select to search by either resource group or resource pool.

Resource Group ID and **Pool ID** — If you select to search by resource group, select from a list of active resource groups. If you select to search by resource pool, select from a list of active pool IDs. The Express Search feature returns candidates only from the selected group or pool.

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 17, "Enabling Resource Matching and Cache Processes," Establishing Resource Groups, page 175.

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 group box.

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 and preference 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. This score is a composite of qualifications and preferences.

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 21, "Assigning Resources," Viewing the Job Scorecard, page 267.

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 21, "Assigning Resources," Viewing the Job Scorecard, page 267.

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 this link 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 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 23

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 8.9 PeopleBook.*

- Define service order priorities.

  See Chapter 15, “Enabling Service Orders,” Defining Service Order Priorities, page 150.

- (Optional) Define service order default values.

  See Chapter 15, “Enabling Service Orders,” Defining Service Order Defaults, page 151.

- (Optional) Create qualification profiles.

  See Chapter 15, “Enabling Service Orders,” Creating Qualification Profiles, page 152.

- (Optional) Create service order templates.

  See Chapter 15, "Enabling Service Orders," Creating, Updating, and Deleting Service Order Templates, page 155.

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, hours per day, 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 are 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.
Open	Manually change the status to *Open.* Use this status to indicate that you no longer consider an order to be in *New* status (for example, if you have reviewed it but have not yet made assignments).

Service Order Status	Triggering Action or Process
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 *Draft* status. You can delete a *Draft* service order using the Delete Service Order page.
Closed	• Create assignments with a status of *Assigned* 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 *Closed* 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 *Canceled.* • 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 *Assigned* to fulfill the quantity of resources who are requested on this resource request. • Manually change the resource request status to *Closed.*

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, Request Resources, 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.

Page Name	Object Name	Navigation	Usage
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	Search for an Owning Organization on the Order Summary page. Click the Advanced Search link or the Basic Search link.	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 Change Location / Contact Informationon the Order Summary page and then 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 Change Location / Contact Informationon the Order Summary page and then 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.

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, hours per day, 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 Program Management, the values for primary project role, quantity, description, hours per day, 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 23, "Requesting Resources Using Service Orders," Service Order and Resource Request Status, page 288.

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.

Pool ID Select the resource pool from which the request would like a resource. This field is optional.

Region Select a region code associated with the request. This field is optional.

Personnel Status Select *Employee* or *Non-Employee.* Displays the personnel status associated with request. This field is optional.

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, days and hours of work are required to submit a service order for fulfillment. The resource request start date, end date, days and hours of work are used by Resource Matching to find available resources.

Hours per Day Enter the number of hours per day required of the resource.

Note. If the request has multiple date ranges, this field will not display a value.

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 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, Resource Matching 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 the Complete Order button 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. Resource Matching 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 22, "Express Searching for Resources," Specifying Qualifications, page 277.

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 22, "Express Searching for Resources," Entering Keywords, page 282.

Entering Order Summary Information

Access the 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: *Canceled, Closed, Draft, In Process, New,* or *Open.* 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 23, "Requesting Resources Using Service Orders," Service Order and Resource Request Status, page 288.

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 23, "Requesting Resources Using Service Orders," Defining Owning Organizations, page 297.

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 23, "Requesting Resources Using Service Orders," Accessing Additional Service Order Options, page 299.

Order Comments and History Click to access the Service Order - Service Order History page.

See Chapter 23, "Requesting Resources Using Service Orders," Accessing Additional Service Order Options, page 299.

E-Mail Partner Click to access the E-Mail Partner page.

See Chapter 23, "Requesting Resources Using Service Orders," Accessing Additional Service Order Options, page 299.

Resource Requests in this Order

This collapsible scroll area displays the project role, description, start and end dates, number of days and hours needed, 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 23, "Requesting Resources Using Service Orders," Adding Additional Resource Request Information, page 301.

View Multiple Date Ranges Click to access and modify the Service Order - Detailed Date Ranges page.

See Chapter 23, "Requesting Resources Using Service Orders," Entering Multiple Date Ranges on Resource Requests, page 302.

Change Location/Contact Information Click to access the Service Order - Location and Contact Details page.

See Chapter 23, "Requesting Resources Using Service Orders," Changing Locations or Contacts, page 302.

Recommend Resource Click to access the Service Order - Recommend Resources page.

See Chapter 23, "Requesting Resources Using Service Orders," Recommending Resources, page 302.

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 basic search page

Select an Organization Expand the tree as needed to identify the desired default owning organization, and then click the organization.

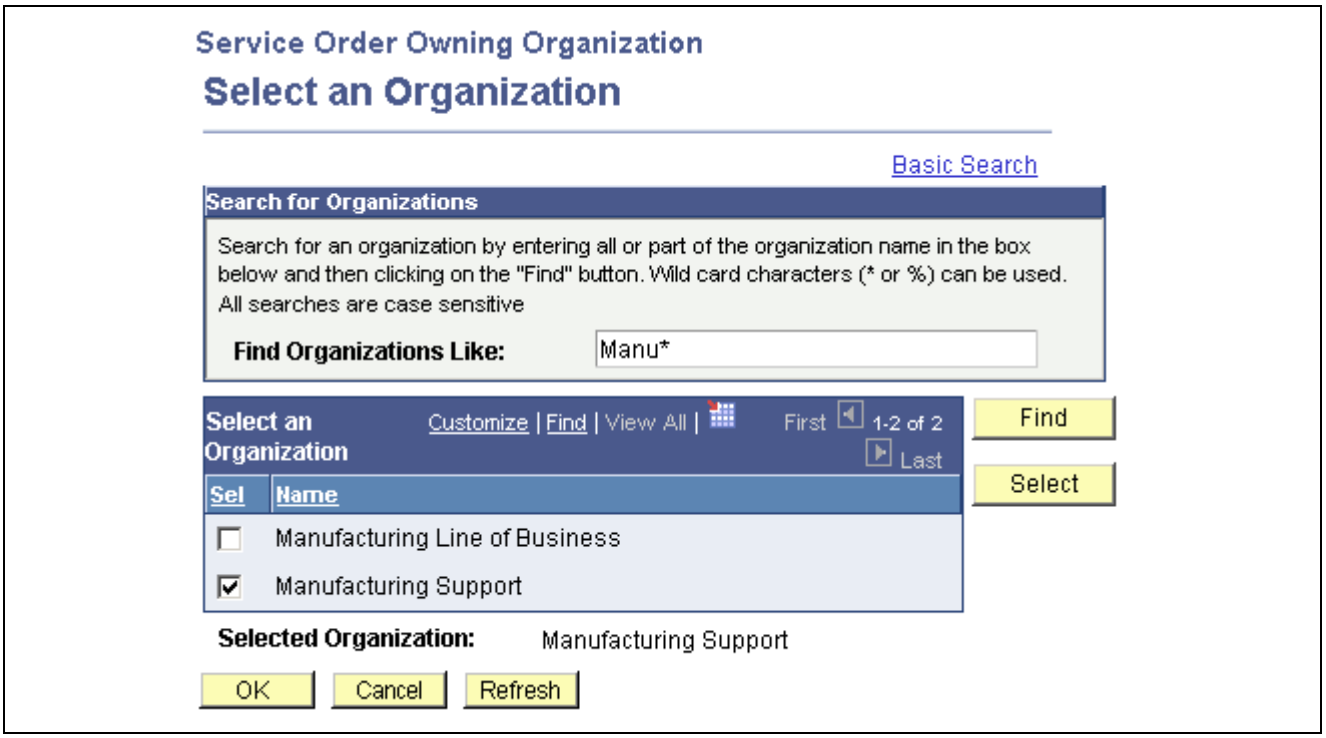
You can select any level on the tree to serve as the default owning organization.

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 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.

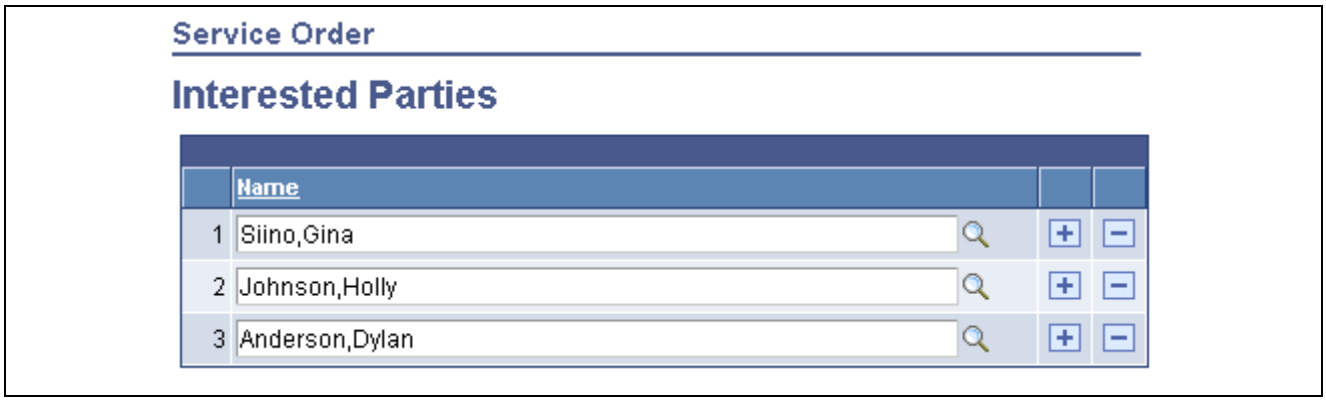
Accessing Additional Service Order Options

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.

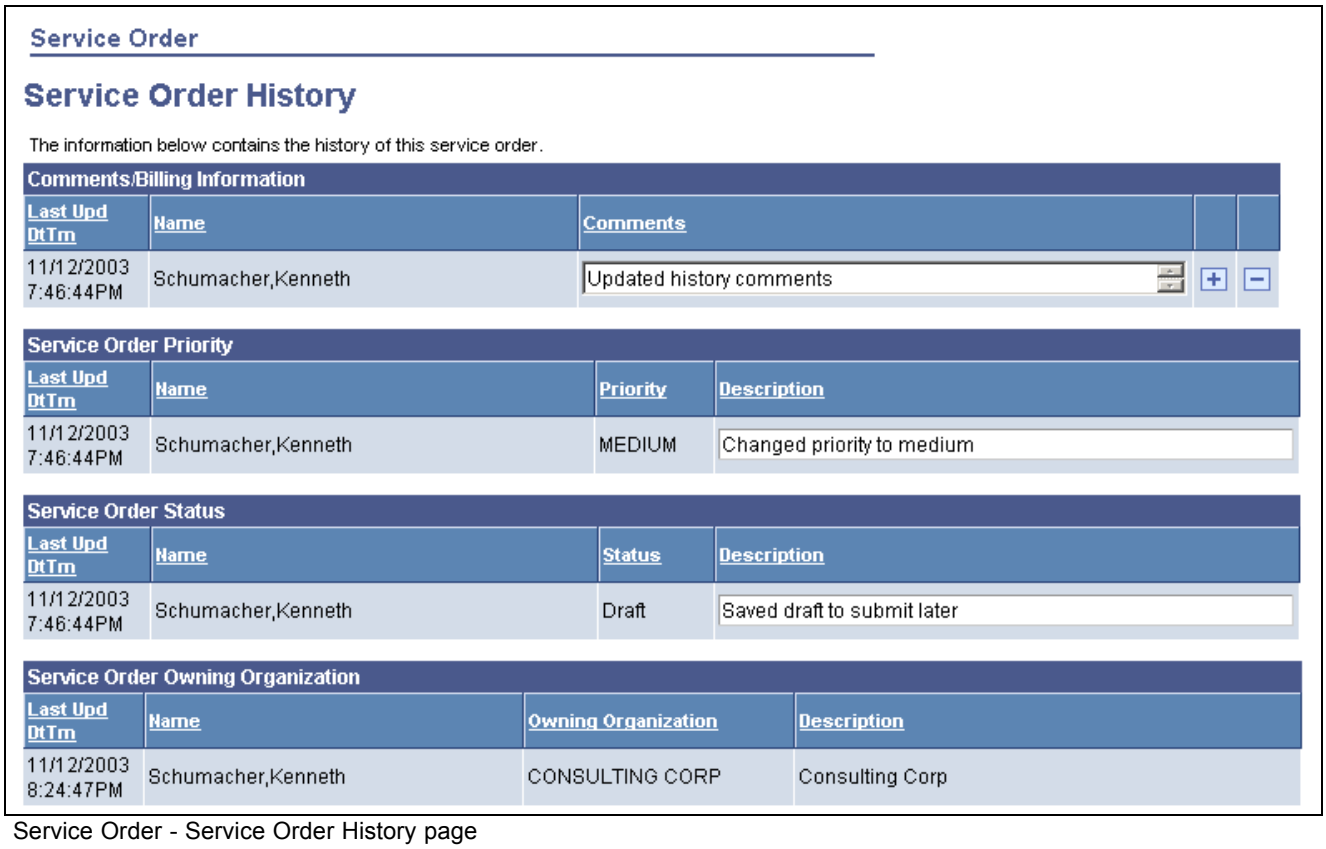


Service Order - Interested Parties page

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 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

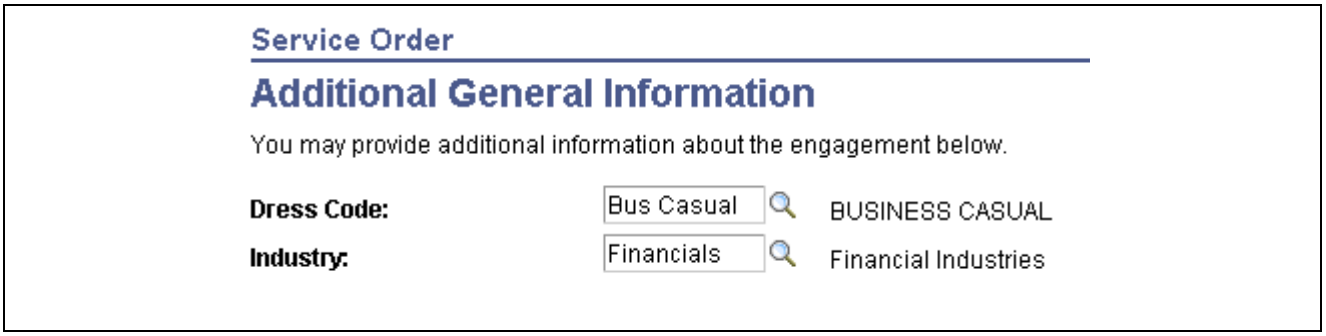
Access the E-mail Partner page.

E-Mail Partner 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.

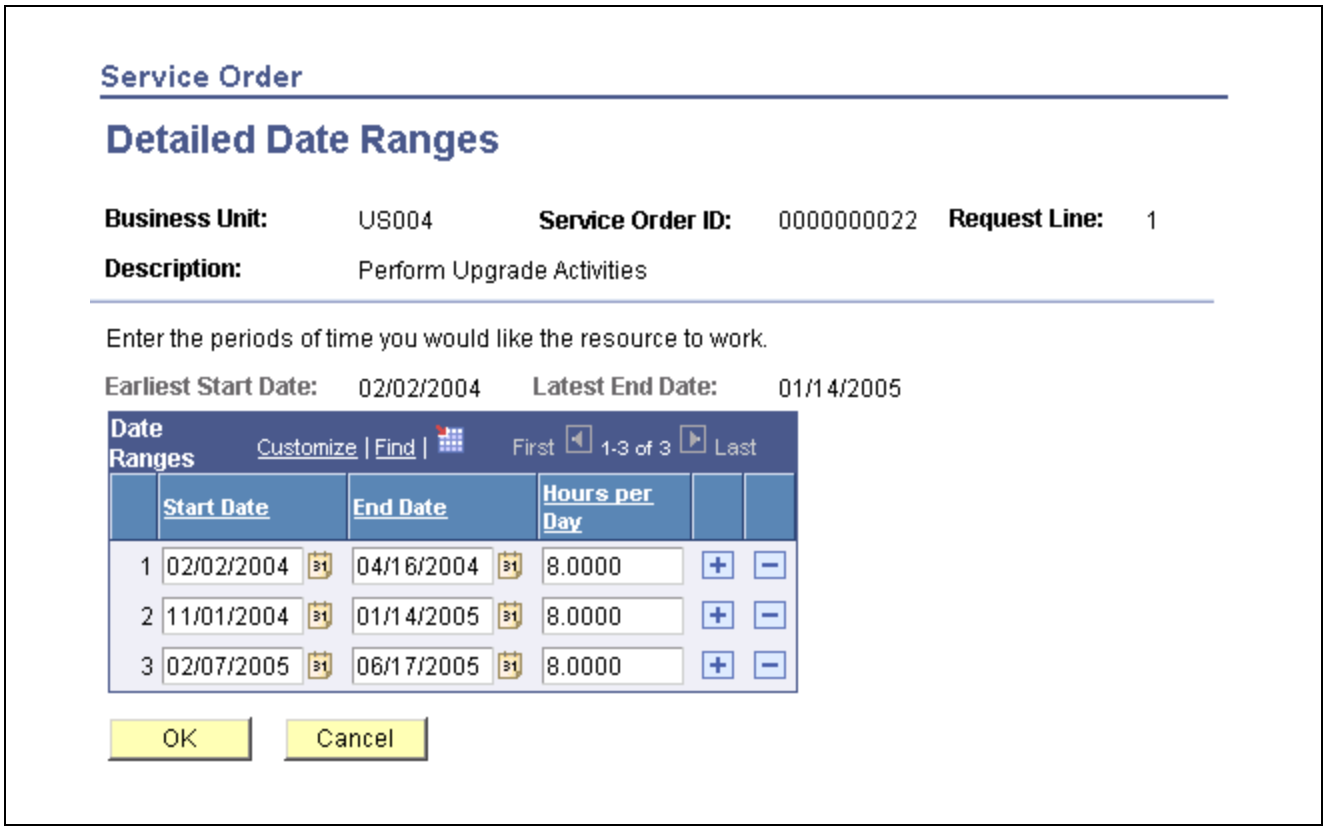


Service Order - Additional General Information page

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 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. You must also enter the number of hours required per day for each 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.

Hours per Day — Enter the number of hours required of the resource per day for each date range listed.

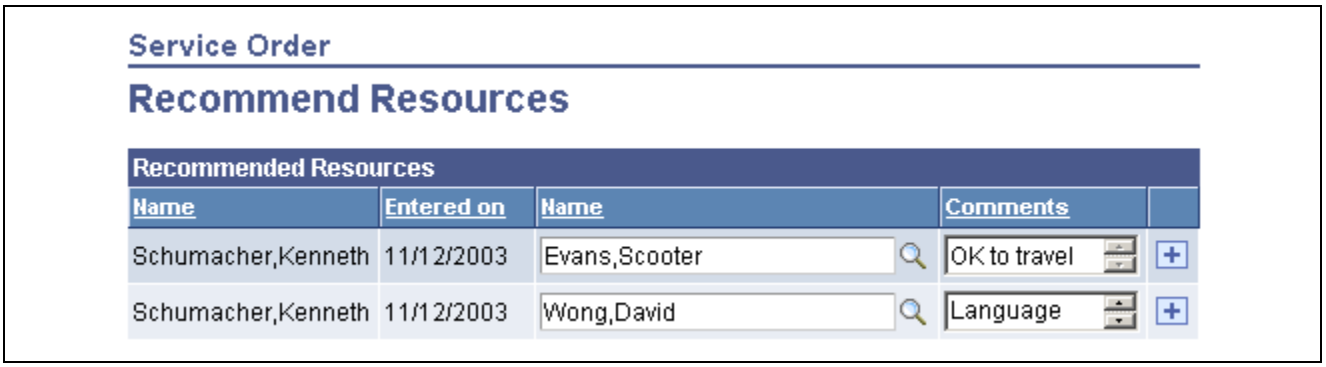
Changing Locations or Contacts

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 page

Use this page to recommend resources for this resource request. Resource Matching 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 *Draft* 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

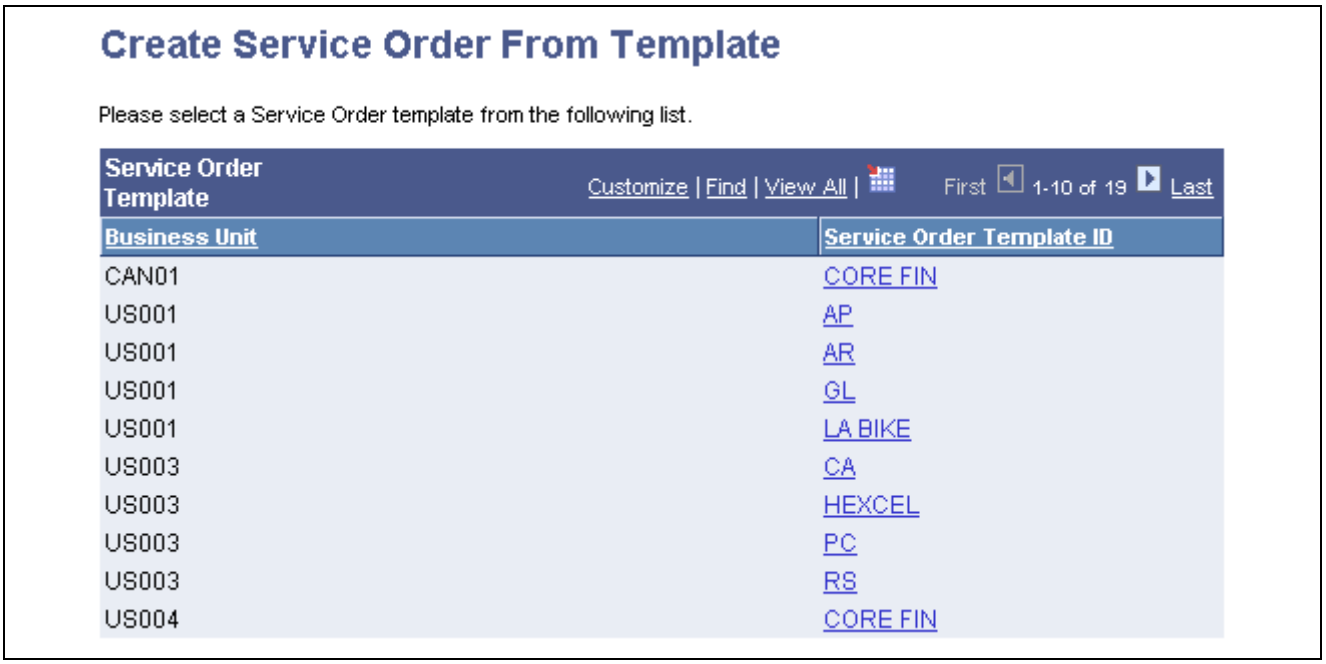
This section discusses how to create service orders from templates.

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 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:

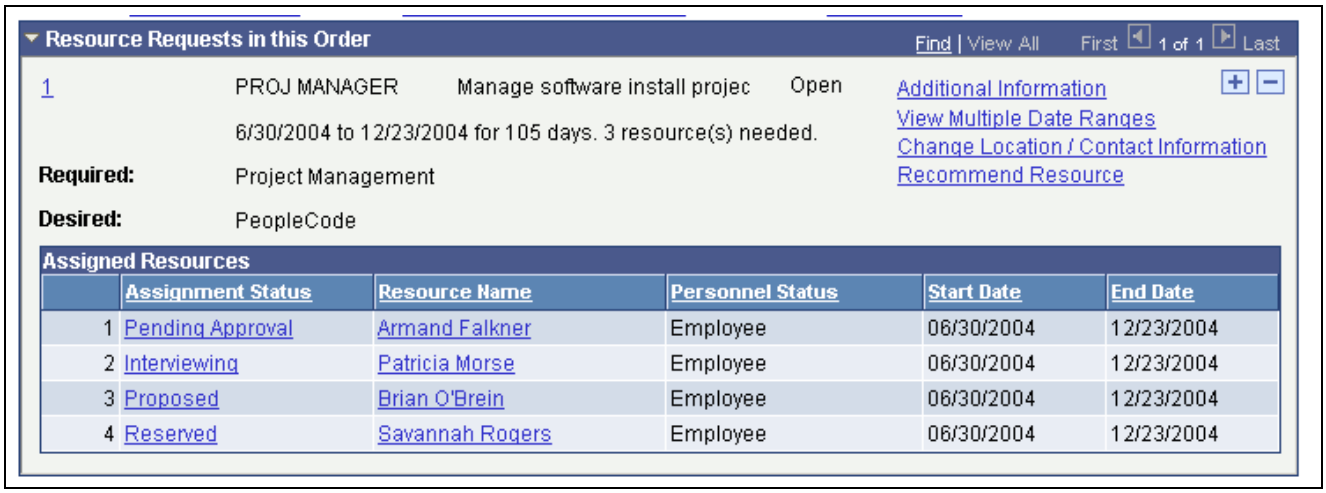
- View assigned resources.
- Review service orders.
- Delete service orders.

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, Request Resources, Delete Service Order, Delete Service Order	Delete service orders.

Viewing Assigned Resources

Access the Order Summary page. Expand the Resource Requests in this Order group box.



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.

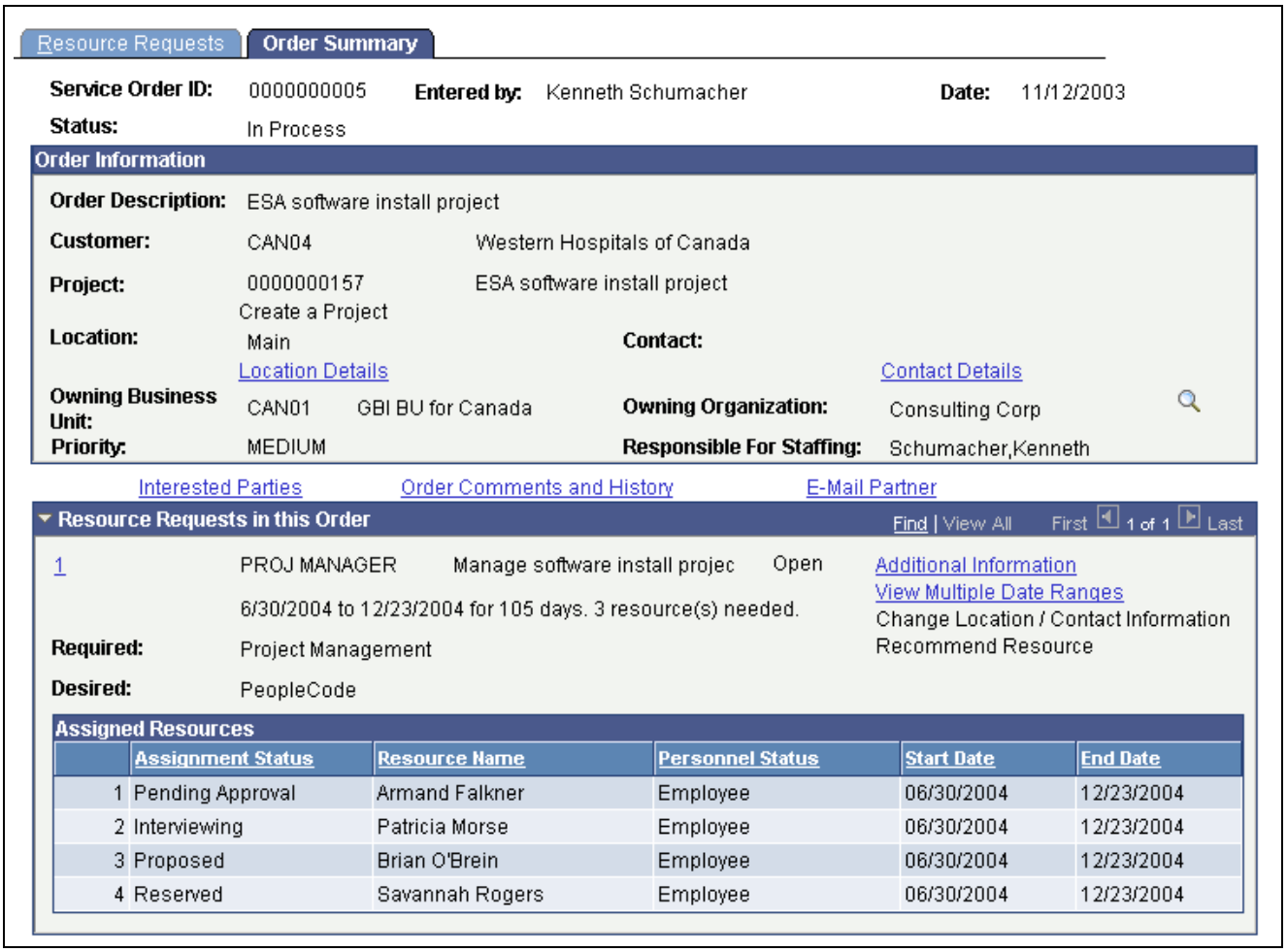
See Chapter 19, "Maintaining Resource Profiles," page 213.

Personnel Status Displays the resource's personnel status of *Employee* or *Non-Employee*.

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.



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 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 24

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.

Note. There are two resource request processes in Resource Management: service orders and generic resource requests. If you will *not* be using service orders to manage your resource requests, and if you also have PeopleSoft Program Management installed, use the information in the Fulfilling Generic Resource Requests chapter. If you manage your resource requests by using service orders, use the information in this chapter.

Understanding Service Order Fulfillment Using the Staffing Workbench

You can use the Staffing Workbench - Fulfill Orders page to manage the entire service 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 Resource Matching.

    You can specify search options, such as resource group or resource pool, and personnel status. The selected search options define the set of resources for Resource Matching to evaluate when searching for suitable resources to fulfill the resource requests that appear in the work space. If you do not 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 Resource Matching 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, preferences, 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 or resource requests.

  If you can't find a suitable resource for a resource request, 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
Workbench	RS_MYWKBNCH_OPT	Resource Management, Define User Options, My Workbench Options	Select default resource groups from which you staff resources.
Resource Group Definition - Resource Groups	RS_RESOURCE_GROUPS	• Click the Add Resource Groups link 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 Click the Add Resource Groups link on the Express Search page. • Resource Management, Define User Options, Resource Group Setup	Add or modify resource groups and select active resource groups.
Orders	RS_MYWKBNCHREQ_OPT	Resource Management, Define User Options, My Workbench Options, Orders	Select the default search scope option for the Staffing Workbench - Fulfill Orders page.

Specifying Staffing Workbench User Options

Access the 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 the 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 this link 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 17, "Enabling Resource Matching and Cache Processes," Establishing Resource Groups, page 175.

Specifying Order Fulfillment User Options

Access the Orders 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 Resource Pool: Select to match resource request against the resource pool that is specified on the resource request (service order line).

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 26, "Managing Resource Utilization," Specifying Resource Utilization User Options, page 344

Fulfilling Open Resource Requests

This section discusses how to:

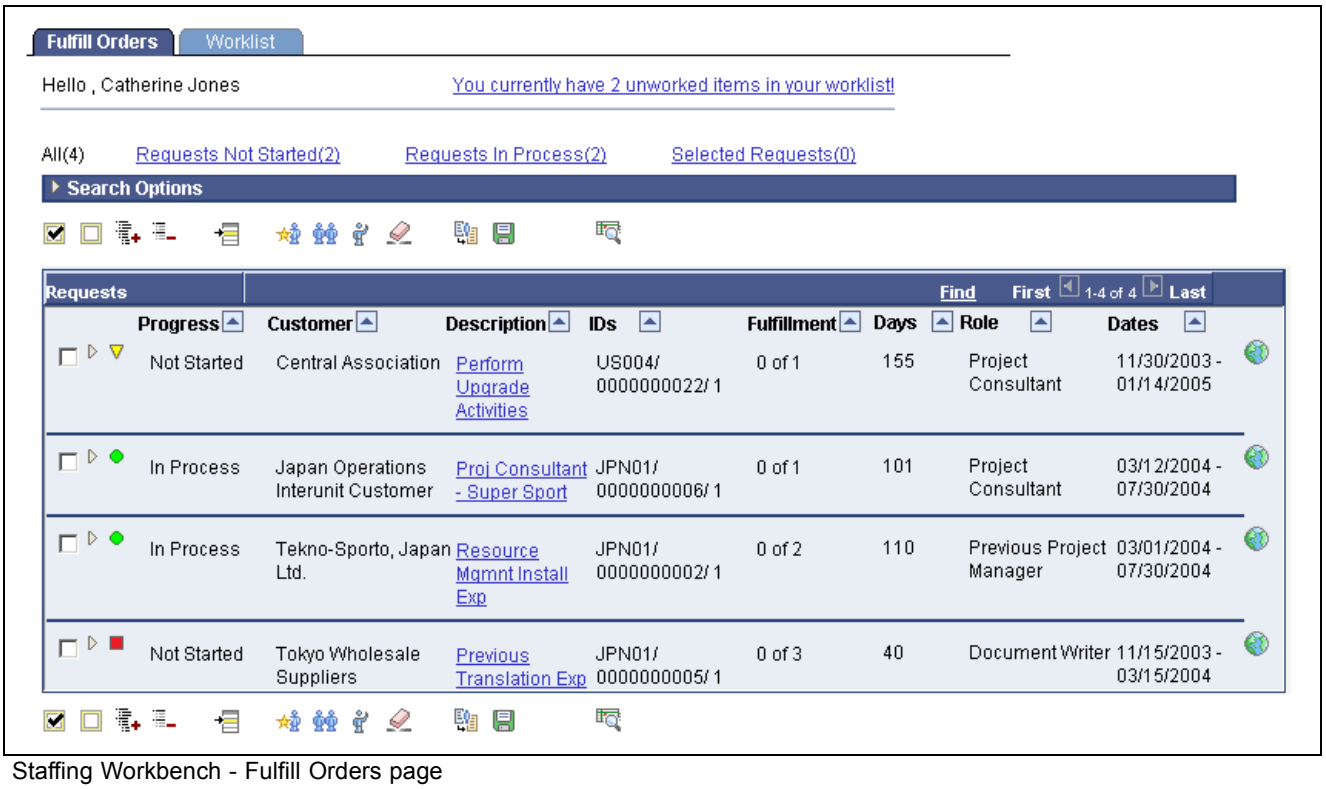
- View open resource requests.
- Filter and expand resource request lists.
- Search for resources.
- Evaluate candidates.
- Review the request schedule Gantt chart.
- Perform actions.
- Confirm actions.

Pages Used to Fulfill Open Resource Requests

Page Name	Object Name	Navigation	Usage
Staffing Workbench - Fulfill Orders	RS_MYSERVICEORDERS	Resource Management, Staffing Workbench	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.	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

The Staffing Workbench - Fulfill Orders page is the starting point for managing generic resource requests, approval and fulfillment. From here you can:

- Approve or reject an open request.
- Perform a search using Resource Matching.
- 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 generic resource request.
- Drill down to details about service orders, resource 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 this link 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 27, “Processing Worklist Items,” page 367.

Requests

Upon entering the workbench, the Requests group box 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.

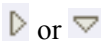
A green diamond indicates that the corresponding resource request starts in more than two weeks.

A yellow triangle indicates that the corresponding resource request starts within two weeks.

A red square indicates that the corresponding resource request start date has passed.

Resource Request Summary Rows

Rows in the Requests group box are collapsed when you enter the page. These rows provide resource request summary information.

 or

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 23, "Requesting Resources Using Service Orders," Creating and Modifying Service Orders, page 290.

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 *Assigned.*

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.
- Resource Matching 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 at the top of 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 *New Open,* or *In Process.* 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.

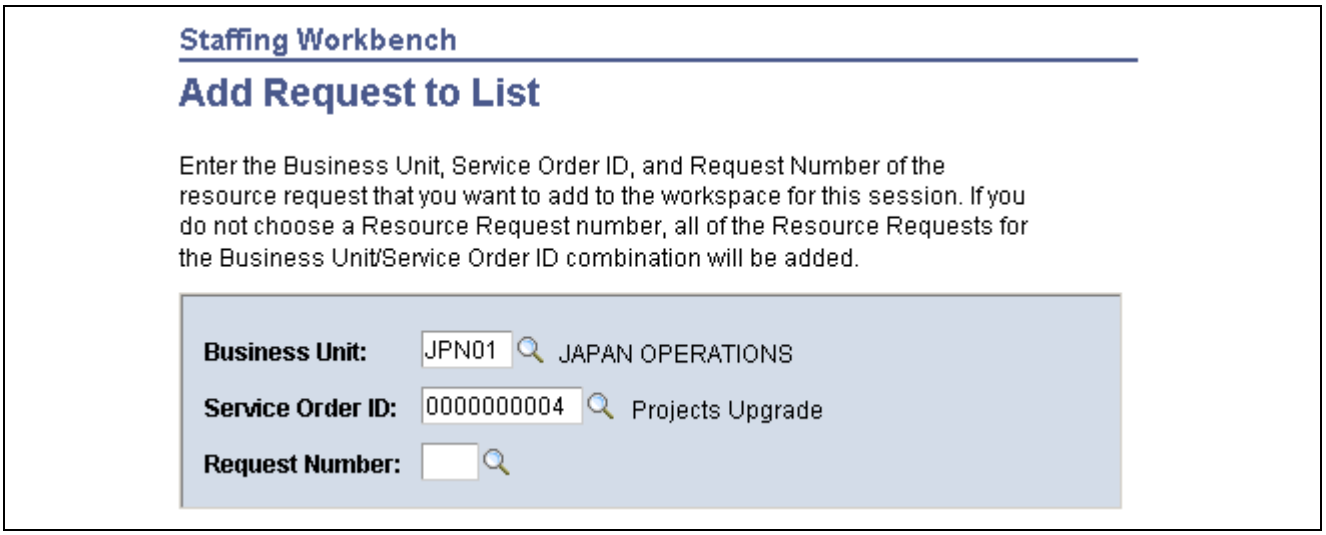
This icon appears only if the active view is the Requests grid.

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 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 Resource Matching 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 the Retrieve Optimal Resource for selected Requests icon 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 theSearch for Resources for selected Requests icon 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. Resource Matching 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.

Indicates that the corresponding resource was returned in the search results from Resource Matching.

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.

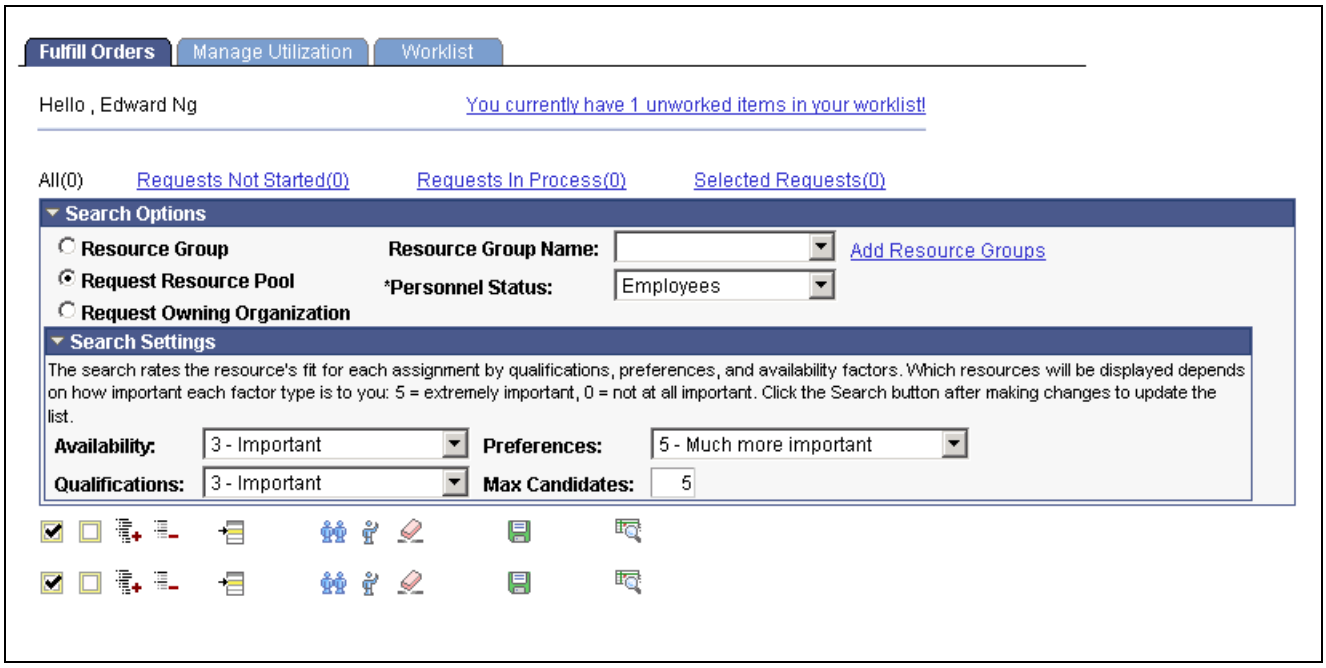
Note. On the service requisition, enter a service type with a service method of *Resource.*

See *PeopleSoft Enterprise Services Procurement 8.9 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.



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 Resource Matching.

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, Request Resource Pool,or the Request Owning Organization that is specified on the service order.

   You can also specify Personnel Status.

   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 Max Candidates (maximum candidates) 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 Resource Matching.

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, Resource Matching recalculates overall fit scores, which potentially changes the order of resources.

Note. Because the QUAL score is a combination of the resource's qualification and preferences fit scores, changing the relative priorities of Qualifications and Preferences may result in a change in the resource's qualification score shown in the workbench. If you only want to see the qualification score in the workbench, set the Preferences search setting to *0 - Not at all important.* The actual values of Qualifications, Preferences, and Availability will appear in the Job Scorecard. (Those values are not affected by the Search Settings values.)

See Chapter 3, "Understanding Resource Matching," The Fit Score, page 36.

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 the Retrieve Bids and Recommendations for Selected Requests icon.

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.

Note. Search settings that you specify on this page do not impact the scores of the resources that are retrieved through Resource Bids and Manager Recommendations.

Add Resources to the Work Space

Click Add Resource on a corresponding resource request row to access the 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.

Note. Search settings that you specify on this page do not impact the scores of the resources that are added to the work space through Add Resource.

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 the Retrieve Optimal Resource for selected Requests icon.

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.

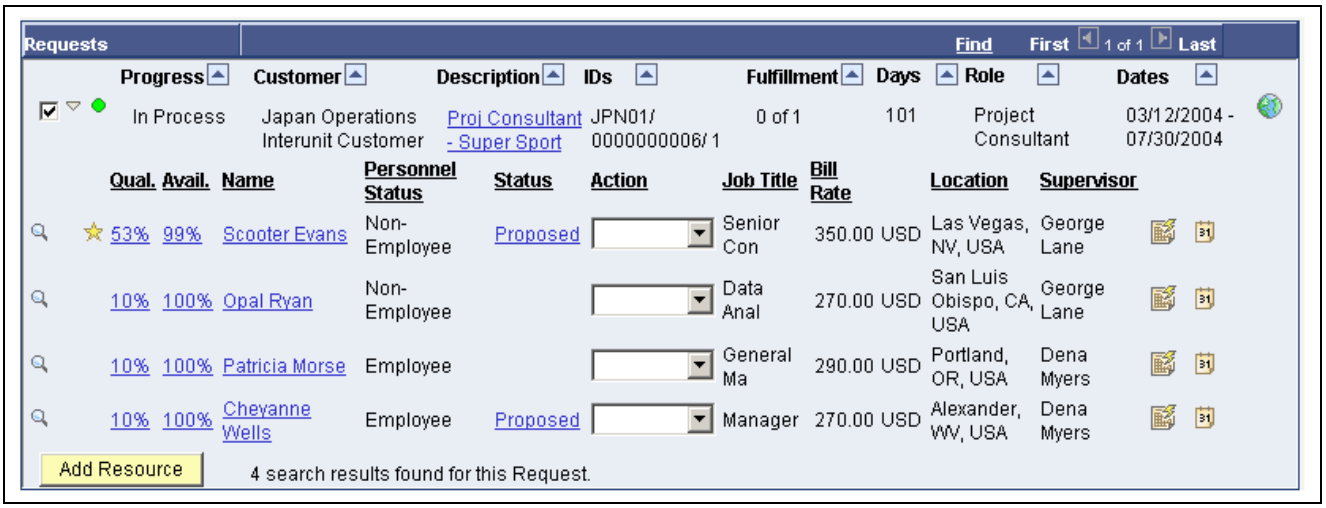
   The list contains only the requesters for which you are authorized to submit requests. The service requisition appears with key requisition data populated from the resource request. The system creates multiple rows on the service requisition if the unfulfilled quantity on the resource request is greater 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 Enterprise Services Procurement 8.9 PeopleBook*, “Creating and Managing Requisitions”.

Evaluating Candidates

Resources who meet the search criteria for a resource request appear under the resource request summary row.



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 fit scores, which indicate how closely the resource's profile and schedule match the resource request. The qualification fit score is composed of the qualification and preferences factor family fit scores.

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.

Note. The qualifications, preferences, and availability scores represent the actual scores of the resource for the request. The scores that appear on the workbench may vary from the Job Scorecard. The scores displayed on in the workbench are based on the search settings used and may vary depending on the relative weights you define for the settings.

See Chapter 21, "Assigning Resources," Viewing the Job Scorecard, page 267.

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 19, "Maintaining Resource Profiles," Reviewing Resource Profiles, page 225.

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.

Note. The search settings that you specify on the workbench do not impact the scores of the resources that appear in the workspace with a value in the Status column.

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:

- *Assign:* Select to 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 *Pending Approval.* The assignment remains in a pending status until it is approved or canceled.
- *Cancel:* Select to cancel an existing assignment.
- *Consider:* Select to associate the candidate with the resource request as someone whom you are considering as a possible match. This is not an assignment status.
- *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.

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 *Assigned* without triggering assignment approval workflow.

Complete: Complete an assignment that is in an *Assigned* status.

See Chapter 21, "Assigning Resources," Assignment Statuses, page 246.

Job Title

Displays the resource's job title.

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.

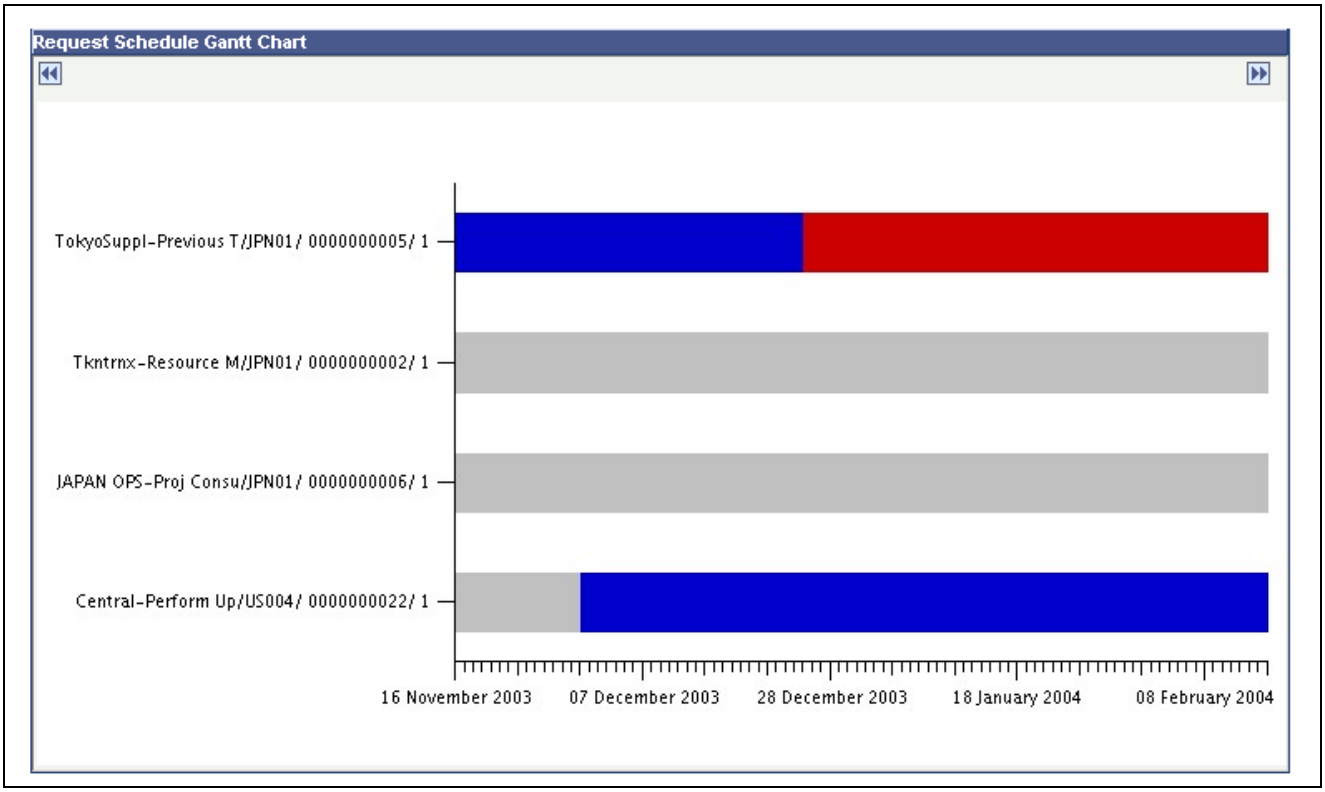
See Chapter 21, “Assigning Resources,” Accessing Additional Assignment Options, page 263.

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 20, “Maintaining Resource Schedules,” Working with Resource Schedules, page 235.

Reviewing the Request Schedule Gantt Chart

Click the Request Schedule Gantt Chart icon to access the Request Schedule Gantt Chart view on the Staffing Workbench - Fulfill Orders page.



Request Schedule Gantt Chart view

Both the Requests group box and the Gantt chart view 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 viewing the Requests group box and then switch to the chart view, the same filter is used to display resource requests in the chart. If you are in the chart view, and select a new filter, then revert back to the Requests group box, the newly selected filter applies.

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.

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.

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 25

Fulfilling Generic Resource Requests

If you will *not* be using service orders to manage your resource requests, and if you also have PeopleSoft Program Management installed, use the information in this chapter. If you manage your resource requests by using service orders, use the information in the Fulfilling Service Orders chapter.

This chapter provides an overview of generic resource requests and discusses how to manage generic resource requests.

Understanding Generic Resource Requests

When a project manager is planning his or her project, it is often not known what the extent of the resource requirements will be—how many people will be needed? A generic resource is a labor resource who does not have an employee ID. These generic resources hold resource pool capacity and serve as role-oriented placeholders for resources during the project-planning phase.

You must have Program Management installed to use generic resource requests in Resource Management. In Program Management a project manager builds a team using the project resource list. If your organization does *not* use service orders to create resource requests (through the Manage Generic Resources functionality in Program Management), then a pool manager builds a team based on generic resources.

You create generic resource requests in Program Management. A generic resource request can be created only from the project resource list. A generic resource request comes into the Pool Manager Workbench in Resource Management with a status of *Pending* or *Allocated* (depending on your Resource Management business unit options), and you can either fulfill it with a named resource, or you can simply allocate capacity.

All generic resource requests from the project resource list are sent to the Pool Manager Workbench with a status of *Pending* if the Pool Manager Approval required check box for the Generic Resource Approval required option is selected on the Resource Management Options page. If that check box is not selected, then generic resource requests are sent to the Pool Manager Workbench with a status of *Allocated.*

The Pool Manager Workbench - Fulfill Request page is the starting point for managing generic resource requests, approval, and fulfillment. Using this page you can:

- Approve or reject a generic resource request.
- Perform a search using Resource Matching.
- View resources who are already associated with the resource requests.
- Search for specific resources to evaluate their fit scores for a generic resource request.
- Drill down to details about generic resource requests, resource profiles, assignments, and schedules to enable you to finalize staffing decisions.

Managing Generic Resource Requests

Pool managers can approve and fulfill generic resource requests easily and efficiently using the Pool Manager Workbench component (RS_MY_GNRC_RQST).

Upon entering the Pool Manager workbench, the Pool:<pool name> group box displays a summary-level, collapsed row for each open generic resource request that is assigned to the pool manager. For each request, you can:

- Approve or reject a request.
- View visual indicators that depict how close the current date is to the requested start date for requests.
- View generic resource request fulfillment progress.
- View summary information about the generic resource request.

This section discusses how to:

- Approve and fulfill generic resource requests.
- View generic resource requests.
- Filter and expand generic resource request lists.
- Identify and add resources to fulfill generic resource requests.
- Confirm actions.

See Also

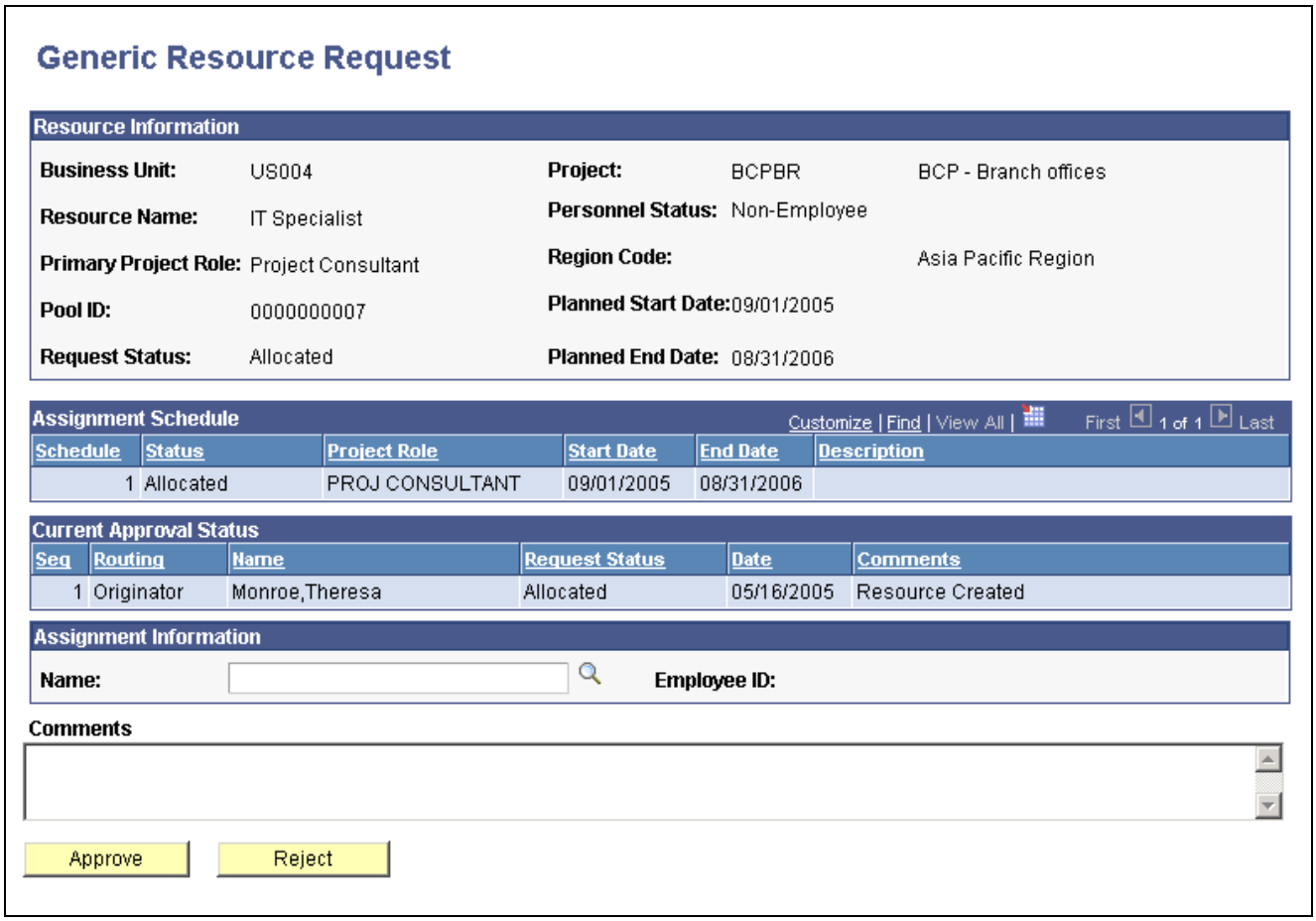
PeopleSoft Enterprise Program Management 8.9 PeopleBook, “Scheduling and Managing Resources”

Pages Used to Fulfill Generic Resource Requests

Page Name	Object Name	Navigation	Usage
Generic Resource Request	RS_GRR_APPRVL	• Click a link in the IDs column on the Pool Manager Workbench - Fulfill Request page. • Click a Details link in the Link column on the Pool Manager Workbench - Worklist page for a resource with an Action of *Generic Resource For Approval.*	Fulfill generic resource requests.
Pool Manager Workbench - Fulfill Request	RS_GRR_WKBNCH	Resource Management, Pool Manager Workbench	Find resources to fulfill generic resource requests.
Select Resource - Resource Search	RS_RESRC_SRCHM_SEC	Click the Add Resource button in a row in the Requests scroll area on the Pool Manager Workbench - Fulfill Request page.	Directly associate resources with resource requests on the Pool Manager Workbench - Fulfill Requests page. **Note.** You can also directly associate a named resource with the resource request on the Generic Resource Request page by clicking the Search icon beneath the Assignment Information group box.
Staffing Changes Confirmation	RS_GRR_WB_CONF_MSG	Save an action on the Pool Manager Workbench - Fulfill Request page.	View actions before committing changes. Add comments for assignment activity.
Update Confirmation	RS_GRRWB_CONF_MSG	Click OK on the Requests Changes Confirmation page.	Confirm actions.

Approving and Fulfilling Generic Resource Requests

Access the Generic Resource Request page.



Generic Resource Request page

Assignment Schedule

Schedule Displays the schedule sequence.

Status If the generic resource request is newly created and pool manager approval workflow is activated for generic resource requests, the status will be *Pending Approval.* If the generic resource request has been approved (but no name assigned yet), the status will be *Allocated.*

Project Role Displays the project role associated with resource's schedule.

Start Date and **End Date** Displays the start and end dates for the resource's schedule.

Current Approval Status

Routing Displays the approval type: *Originator* or *Approver.*

Name Displays the name of the originator or approver.

Request Status Indicates completed steps in the generic resource request approval process.

Date Displays the date on which the approval status was assigned.

Assignment Information

Name Select a named resource from the requesting resource pool. Once the assignment is created, this field is display only.

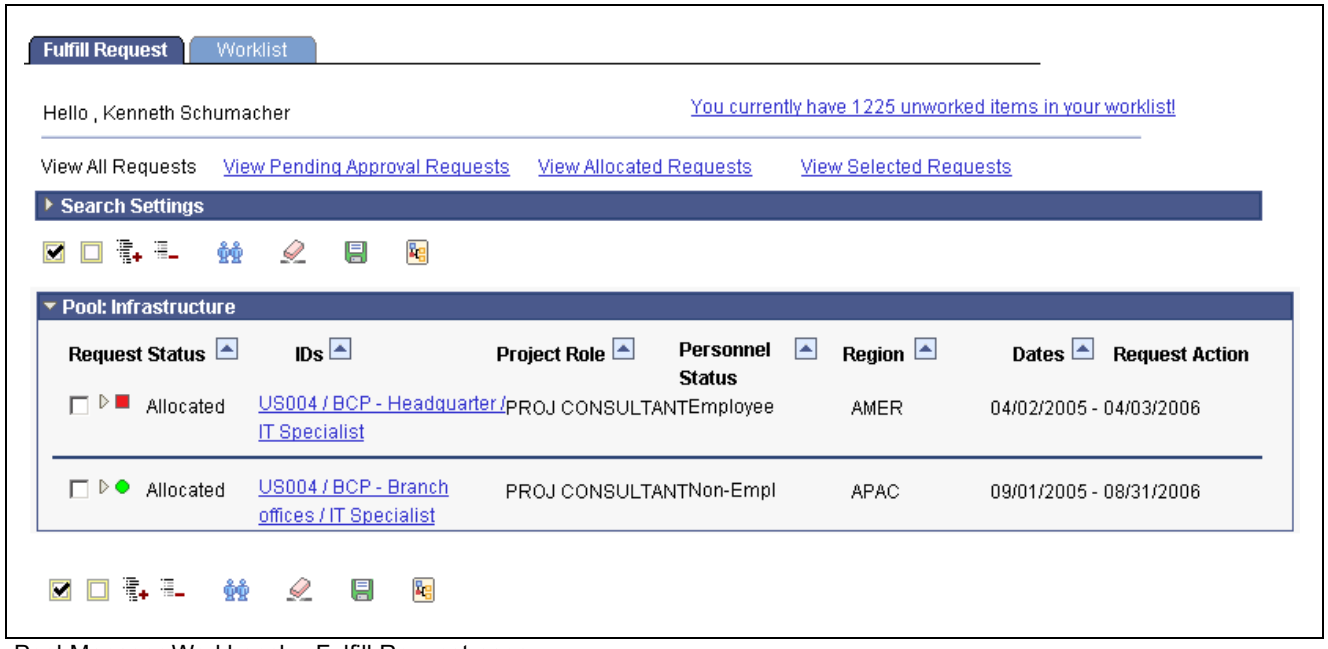
After you select a named resource, click the Approve button to change the Request Status in the Current Approval Status group box to *Fulfilled*.If you enter a resource in this field and click Approve the generic resource request is fulfilled.

Note. You can approve a generic resource request without providing a named resource for it.

Comments Enter information regarding the generic resource request such as why you reject the request. The page will display the comments when the project manager reviews his/her requests. Pool manager must enter comments when he/she rejects a request.

Viewing Generic Resource Requests

Access the Pool Manager Workbench - Fulfill Request page.



Pool Manager Workbench - Fulfill Request page

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 generic resource requests on the Pool Manager Workbench - Fulfill Requests page.

See Chapter 27, "Processing Worklist Items," page 367.

Pool:<Pool Name>

One or more group boxes display all the resource pools owned by the current pool manager. There will be a separate group box for each active resource pool of which the user is the manager. Each group box will contain all the generic resource requests for that pool that have not been fulfilled.

Each resource request row has a visual indicator that depicts how close the current date is to the requested start date for the request. This helps you determine which requests need your attention first.

The visual indicator values are the same as the ones described within the Staffing Workbench - Fulfill Orders page.

Resource Request Summary Rows

Rows in the Pool:<Pool Name> grid are collapsed when you enter the page. These rows provide resource request summary information. When you expand resource request summary rows, they display basic information about resources who are associated with the resource request and the resource's factor fit scores for the request.

A resource may appear in the expanded row if:

- You are considering the resource for the resource request.
- You add this resource to the resource request row.

A more detailed discussion of the information that appears for each resource row is discussed in the upcoming Evaluating Candidates section of this chapter.

See Chapter 24, "Fulfilling Service Orders," Evaluating Candidates, page 322.

Request Status Displays generic resource request fulfillment progress.

Pending Approval: The request has not been approved yet.

Allocated: The request is approved and is waiting for fulfillment with a named resource.

IDs Displays a concatenation of the business unit ID, project ID, and team member ID. Click a link in this column to access the Generic Resource Request detail page.

Project Role Displays the project role.

Personnel Status Displays the personnel status.

Region Displays the region.

Request Action Displays the generic resource request action for the pool manager. Pending approval requests will have the following options:

*Approve:*Select to approve the current generic resource request. This means that the pool manager is willing to allocate the requested resource capacity of a resource in his or her resource pool.

Reject: Select to reject the current generic request. This means that the pool manager is not willing to allocate any resource capacity from his or her pool for the request.

Note. If the generic resource request is already *Allocated,* no data will display under this heading.

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.

Filtering and Expanding the Generic Resource Request List

You can view subsets of the unfulfilled generic resource requests that are assigned to you. Four filters control the generic resource requests that display in the Pool:<pool name> group box. Only requests that meet the particular filter criteria display in the group box.

View All Requests Click this link to view all open generic resource requests that are associated with a resource pool that is assigned to you and has a value of *Pending Approval*or *Approved.*

View Pending Approval Requests Click this link to view a subset of generic resource requests that are pending approval.

View Allocated Requests Click this link to view a subset of resource requests that are allocated. Allocated requests are requests for which the pool manager is willing to allocate resource capacity from his or her pool to the requestor, but for which the pool manager does not yet have a specific resource chosen to assign.

View Selected Requests Click this link after selecting the check box beside the generic resource requests that you want to appear in the Pool:<pool name> group box. To remove another resource request from this filter, clear the request check box and click View Selected Requests again.

Click Select All to select all resource requests that appear in the work space.

Click Deselect All to deselect all resource requests.

Click Expand All to expand all resource request summary rows.

Click Collapse All to collapse all resource request summary rows.

Identifying and Adding Resources to Fulfill Generic Resource Requests

There are two ways to find resources to fulfill generic resource requests on the Pool Manager Workbench:

- Use the resource search to bring those resources that match with the qualification profile associated with the role specified in the request.
- Add a resource that belongs to the requested resource pool to a generic resource request row.

These toolbar icons invoke a search for resources and the visual indicators appear when a resource matches the search criteria:

Click the Search icon 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. Resource Matching calculates factor fit scores for each combination of resource and generic resource request.

The system returns resources who meet this criteria for a generic 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.

Note. The qualifications that are used in the search come from the qualification profile that is associated with the project role specified on the Generic Resource Request page. Therefore, it is important to create a qualification profile for each project role created in the system.

Click Supply Category Analytic Report to view the supply category availability analytic.

See Chapter 29, "Conducting Capacity Planning," Conducting Consolidated Scenario Analysis, page 415.

Add Resource Click this button to add a resource to the list of candidates. This button appears for each expanded resource request row. Use this option to directly associate a resource to the generic resource request. Select the resource and return to the workbench to select the appropriate action. The resource selected must belong to the requesting resources pool.

Search for Resources Based on Factor Fit Scores

Expand the Search Settings group box.

Note. The search is based on the resource pool that is specified on the generic resource request.

To populate the workbench with resources based on the resource's factor fit scores for this request:

1. If you permit non-employees to be resources, select to include all personnel statuses, or just employees or non-employees, in your search.
2. Assign the relative priorities to the Availability, Preferences, and Qualifications factor family fit scores for this search session, and identify the Max Candidates (maximum candidates) to be returned.
3. Select the generic resource request rows for which you want to search for resources.
4. Click the Search icon.

If selected generic resource requests are matched with resources based on the resources' factor fit scores, the resources appear with the row expanded and a visual indicator that the corresponding resource was returned in the search results from Resource Matching.

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, Resource Matching recalculates overall fit scores, which potentially changes the order of resources.

When the system returns scores, you can click the score and be taken to the Job Scorecard.

Note. Because the qualification score is a combination of the resource's qualification and preferences fit scores, changing the relative priorities of qualifications and preferences may result in a change in the resource's qualification score shown on the workbench. If you only want to see the qualification score in the workbench, you can set the preferences search setting to *0 - Not at all important.* The actual Qualifications, Preferences, and Availability values will appear in the Job Scorecard. Those values are not affected by the search settings.

See Chapter 3, "Understanding Resource Matching," The Fit Score, page 36.

Add Resources to the Work Space

Click the Add Resource button on a corresponding resource request row in the Pool Manager Workbench - Fulfill Requests page to access the Select Resource - Resource Search page.

To directly add resources to the work space for a generic resource request:

1. The resource pool associated with the generic resource request filters the search.
2. Search for a resource by employee ID or name in the Search by drop-down list box. The resources that appear include all resources that are assigned to the pool as of the current date, as well as resources that have a start date in the future for this pool. This gives the Pool Manager the ability to assign a future-dated resource to a request with dates that correspond to the dates the resource is assigned to the pool

   Because the system displays resources that will be part of the pool at some future date, pool managers have greater flexibility in assigning a future-dated resource to a future-dated request. For example, if a resource starts in pool on 10/01/05 and the request is for 10/01/05, because the resource is included in the search results, the pool manager is able to assign the resource to the request.

   Note. If the pool manager selects a future-dated resource for a request and resource manager assignment approvals are activated, the system sends the assignment approval workflow to the resource's current resource manager.
3. Click the resource Name link to add it to the Selected Resources group box.
4. Click OK to add the resource to the Pool:<pool name> group box on the Pool Manager Workbench - Fulfill Request page.

   Note. Search settings that you specify on this page do not impact the scores of the resources that are added to the work space through Add Resource.

Evaluating Candidates

Select a generic resource request by clicking its left-hand column check box and then click the Search icon to have the system return resources with factor fit scores based on specified search options.

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 Pool <Pool Name> work space with the row expanded. You can click the View Selected Requests link 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.

The qualification fit score is made up of the qualification and preferences factor family fit scores.

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.

Note. The qualification, preferences, and availability scores represent the actual scores of the resource for the request. The scores that appear on the workbench may vary from the Job Scorecard. The scores displayed on the workbench are based on the search settings used and may vary depending on the relative weights you place in the settings.

See Chapter 21, "Assigning Resources," Viewing the Job Scorecard, page 267.

Name Click the resource name link to open the resource profile in a new browser window.

See Chapter 19, "Maintaining Resource Profiles," Reviewing Resource Profiles, page 225.

Role Displays the resource's role.

Status Displays the assignment status (*Considered* or *Pending Approval*) and provides a link to the assignment if the resource is assigned (status *Pending Approval*) to the request. Click this link to access the Assign Resource page to view or update the assignment.

Note. If a resource status is *Assigned* or *Pending Approval,* this data will only appear until the pool manager exits the workbench. If the pool manager returns to the workbench, any resources that have been assigned or are pending approval will no longer appear in the workbench because the generic resource request has not been fulfilled and is no longer in the pool manager's queue.

Note. The search settings that you specify on the workbench do not impact the scores of the resources that appear in the grid with a value in the Status column.

Action Select to assign this resource to the current generic resource request:

- *Assign:* The assignment appears on the confirmation pages for you to edit and verify. There you can modify the days of the week, hours per day, and start time, and make comments. If project manager approval workflow is enabled, the assignment is automatically routed to the project manager for approval after you save and confirm the actions on the workbench. The next time you refresh the Pool Manager Workbench, this request does not appear in the Pool:<pool name>group box and the resource's assignment status is*Pending Approval.* 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 *Assigned* without triggering assignment approval workflow. Only one resource can be assigned to one request.

- *Consider:* Associate the candidate with the resource request as someone whom you are considering as a possible match. This is not an assignment status.

Note. When project manager approval workflow is enabled in Resource Management business unit options, it is critical that a project manager be assigned prior to assigning resources to the project. If a project manager has not been assigned to the project and project manager approval workflow is enabled, the resource that is selected here will be put on the project with a resource status of *Considered* and no Resource Management assignment will be created. The generic resource request will be fulfilled at this point because the pool manager has provided a resource for the request. This resource, however, cannot be assigned to the project until a project manager has been assigned to the project first.

See Chapter 21, "Assigning Resources," Assignment Statuses, page 246.

Region Displays the region of the resource.

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.*

Click the Assignment 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.

See Chapter 21, "Assigning Resources," Accessing Additional Assignment Options, page 263.

Click the Monthly Calendar icon to access the resource's monthly schedule in a new browser window and view the assignments and appointments schedule.

See Chapter 20, "Maintaining Resource Schedules," Working with Resource Schedules, page 235.

When you save the page and accept the confirmation:

- If there is no existing assignment for this combination of resource and project, 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.
  - Automatically routes the assignment to the resource's manager, the project manager, or both, for approval if assignment approval workflow is enabled.
- If you selected an Action status of *Consider,* the system saves the record to associate this resource with the generic resource request as a possible candidate.

  An assignment is not created for an action status of *Consider.*

Note. Resources that have a status of *Consider* are associated with the resource request only on the Pool Manager Workbench. This information does not appear anywhere else in the system. These resources appear in the work space each time the generic resource request appears until their status changes or the generic resource request is closed or canceled.

Confirming Actions

Access the Staffing Changes Confirmation page.

When you save the actions on the Pool Manager Workbench - Fulfill Requests page, the Staffing Changes Confirmation page appears and explains the changes to be made for every selected generic 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 the resource selected.
- If assignment approval is required, the status of the assignment changes to *Pending Approval.*
- Assignment history is updated when you confirm the request changes.

CHAPTER 26

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.
- Define supply category analytics.

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 Resource Matching.

    You can specify search options that define the set of resource requests for Resource Matching to evaluate when finding work for resources. If you do not 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 Resource Matching 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_MYWKBNCH_OPT	Resource Management, Define User Options, My Workbench Options	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_MYWKBNCHRSC_OPT	Resource Management, Define User Options, My Workbench Options, Utilization	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. **Note.** The My Workbench Options - Orders options page is discussed in a previous chapter.

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 group box 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 will not contain any resource rows when you access the Staffing Workbench - Manage Utilization page.

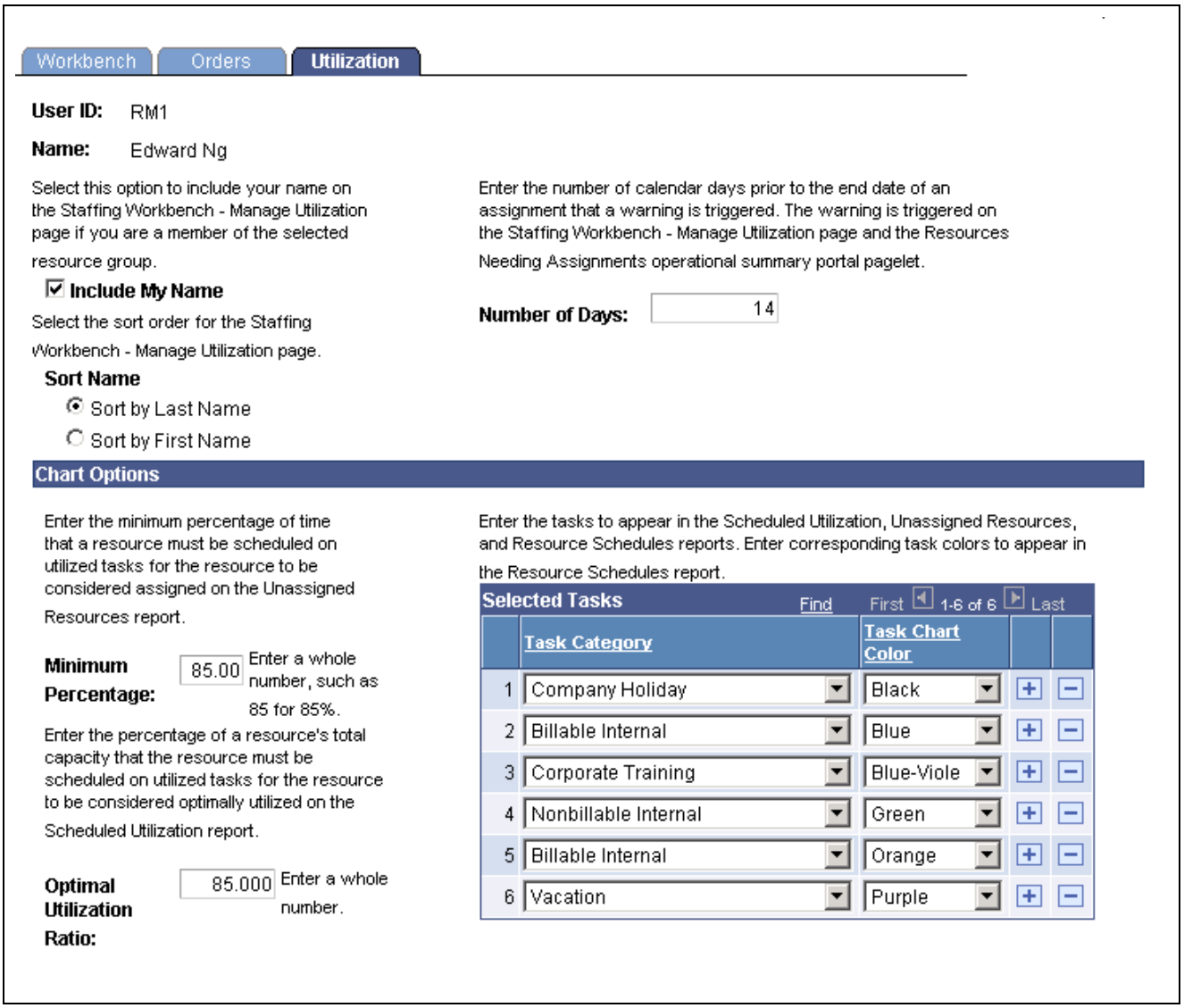
You can select a different resource group from the Staffing Workbench and the Express Search page when you search for resources.

Add Resource Groups Click this link 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 17, "Enabling Resource Matching and Cache Processes," Establishing Resource Groups, page 175.

Specifying Resource Utilization User Options

Access the My Workbench Options - Utilization page.



My Workbench Options - Utilization page

Include My Name Select to include your name in the Resources group box 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.

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 24, "Fulfilling Service Orders," Specifying Order Fulfillment User Options, page 312

Managing Resource Utilization

This section discusses how to:

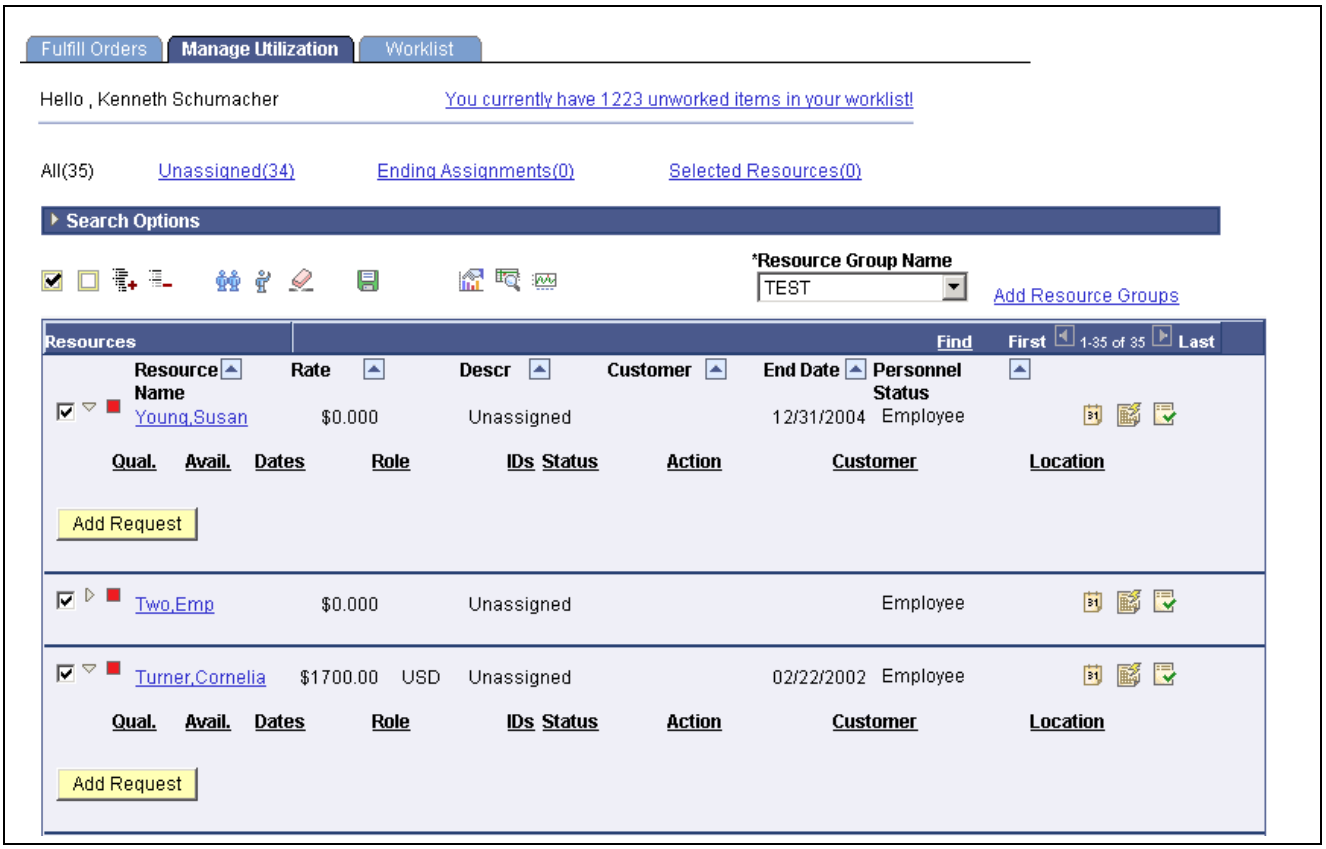
- View resources.
- Filter and expand resource lists.
- Search for assignments for resources.
- Evaluate resource requests.
- Review utilization charts.
- Perform actions.
- Confirm actions.

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 an Add Request button in a resource row in the Resources group box 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.



Staffing Workbench - Manage Utilization page

The Staffing Workbench - Manage Utilization page provides a multi-layer view of Resource Management data that is especially useful for the resource manager. The first group box displays encapsulated resource data with visual indicators denoting the resource's current assignment status. You can access resource assignments, profiles, and schedules, and use Resource Matching 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 workflow.

See Chapter 27, "Processing Worklist Items," page 367.

Resources

Upon entering the workbench, the Resources group box 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.

A green diamond indicates that the corresponding resource is currently assigned.

A yellow triangle indicates that 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.

A red square indicates that 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 group box are collapsed when you enter the page. These rows provide resource summary information.

or

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 19, "Maintaining Resource Profiles," Reviewing Resource Profiles, page 225.

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 20, "Maintaining Resource Schedules," Working with Resource Schedules, page 235.

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:

- Resource Matching 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 26, "Managing Resource Utilization," Evaluating Resource Requests, page 355.

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 group box 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 group box —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 Resource Matching, 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 26, "Managing Resource Utilization," Reviewing Utilization Charts, page 357.

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.

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 Resource Matching 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. Resource Matching 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 Matching 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 Resource Matching.

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.

Resource Group Name Select the specific names—such as *HR, Programmers,* and *LAN Admins*—of the resource groups by which to search. Click the Add Resource Group link to modify or add a resource group and return to the Staffing Workbench.

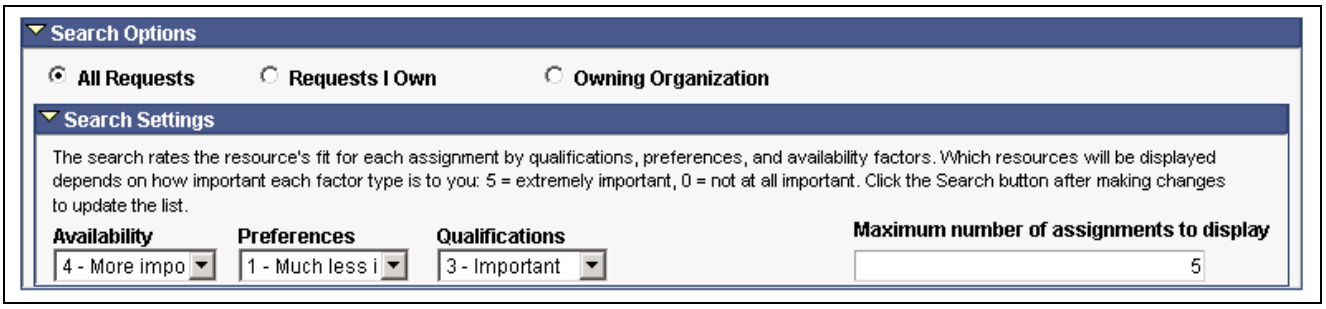
The resource group defaults from My Workbench options.

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 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 Resource Matching.

To populate the workbench with resource requests based on a resource's factor fit scores:

1. In the Search Options collapsible group box, specify the search options that indicate which resource requests Resource Matching needs to evaluate when it searches for work for the resources. You can direct your search to:
   - All Requests: Click to have Resource Matching evaluate all open requests as potential matches for the resource.
   - Requests I Own: Click to have Resource Matching 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 Resource Matching evaluate open resource requests with a service order owning organization that includes the resource's organization.

     For example, if the organizational unit is department, Resource Matching evaluates any open resource request that specifies the resource's department or a parent department as the owning organization on the service order.
2. 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.
3. Select the resource rows for which you want to search for resources.
4. 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, Resource Matching recalculates overall fit scores, which potentially changes the order of resource requests.

Note. Because the QUAL score is a combination of the resource's qualification and preferences fit scores, changing the relative priorities of Qualifications and Preferences may result in a change in the resource's qualification score shown in the workbench. If you only want to see the qualification score in the workbench, set the Preferences search setting to *0 - Not at all important.* The actual values of qualifications, preferences and availability will appear in the Job Scorecard. Those values are not affected by the Search Settings values.

See Chapter 3, "Understanding Resource Matching," The Fit Score, page 36.

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.

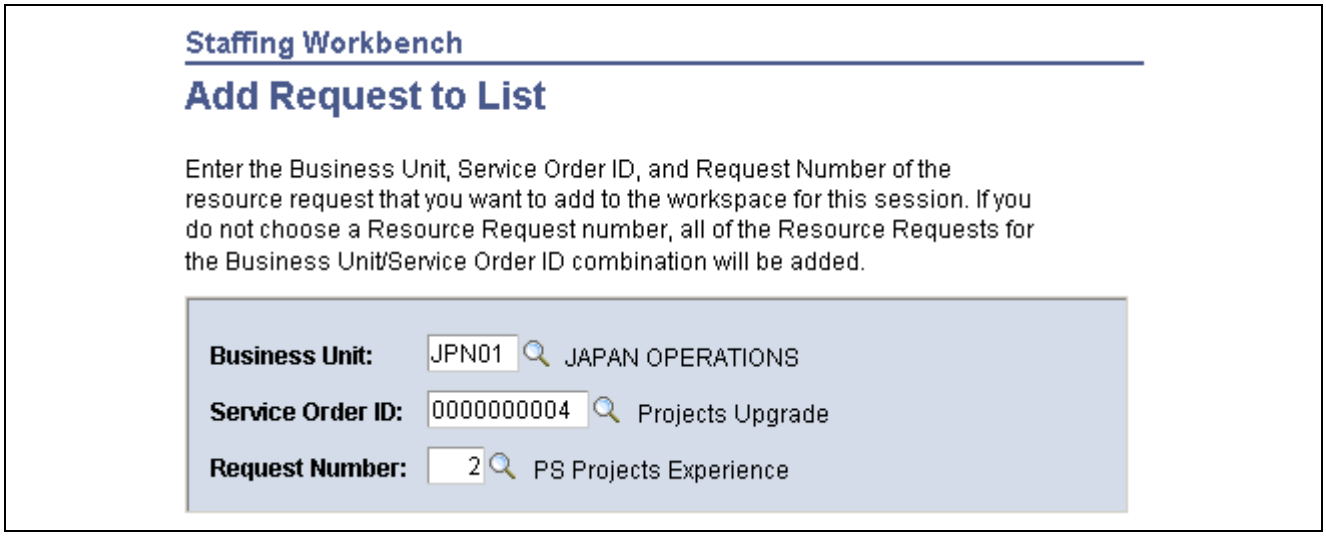
If selected resources bid or were recommended for requests, the requests appear in the work space with the resource row expanded and a visual indicator that the resource submitted a bid or received a recommendation.

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.

Note. Search settings that you specify on this page do not impact the scores of the requests that are retrieved through Resource Bids and Manager Recommendations.

Add a Resource Request to the Work Space

Click the Add Request button on a corresponding resource row to access the Staffing Workbench - Add Request to List page.



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.

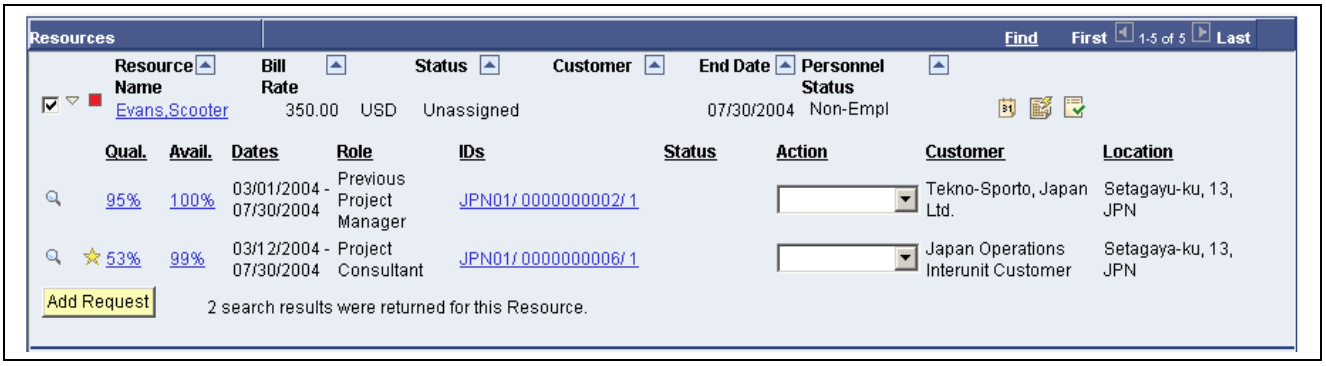
   If no value is selected, all resource requests that are associated with the selected business-unit-and-service-order combination are added to the Resources work space when you click OK.
4. Click OK.

The selected resource requests appear in the work space under the selected resource summary row.

Note. Search settings that you specify on this page do not impact the scores of the requests that are added to the work space through Add Request.

Evaluating Resource Requests

Resources that meet the search criteria for a resource appear under the resource summary row.



Expanded Resources group box 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. The qualification fit score is made up of the qualifications and preferences factor family fit scores.

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.

Note. The QUAL score retrieved by the search on the workbench is a reflection of how well the requests match the resource—*not* how well the resource matches a particular request. This allows a more accurate set of requests that will maximize the utilization of a resource's qualifications and preferences. Because the Job Scorecard is leveraged by many different parts of the system, it is important to note that the scores contained in it are from the resource request perspective—how well a resource matches a particular request. Therefore, the Job Scorecard scores may vary from the Manage Utilization search results.

See Chapter 21, "Assigning Resources," Viewing the Job Scorecard, page 267.

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.

Note. The search settings that you specify on the workbench do not impact the scores of the requests that appear in the work space with a value in the Status column.

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 21, "Assigning Resources," Assignment Statuses, page 246.

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

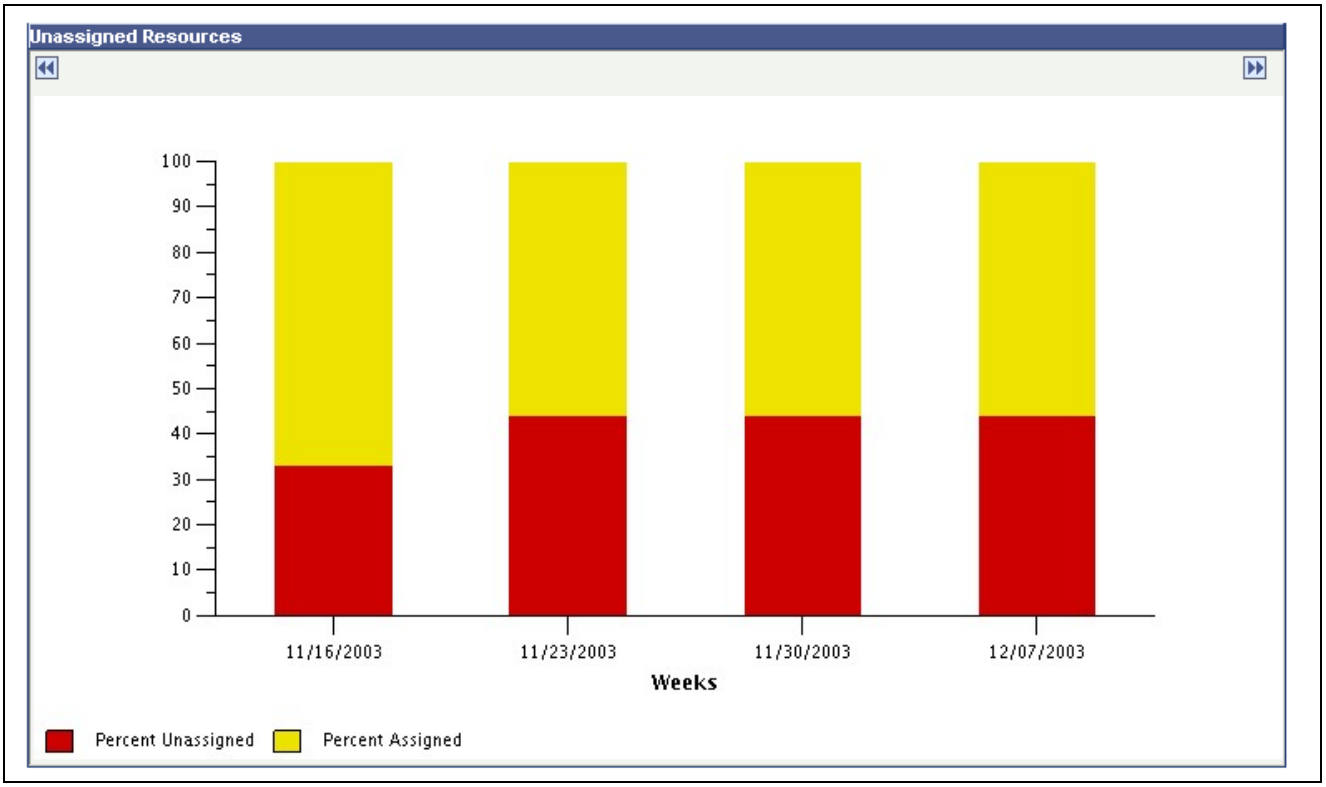
Resource Management provides real-time analyses that you can view from the workbench to aid in managing utilization of resources. All views on this page contain the resources who appear in the active filter—all resources, unassigned resources, resources with ending assignments, or only selected resources. If you select a filter while the Resources group box 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 group box, the new filter appears in the group box.

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

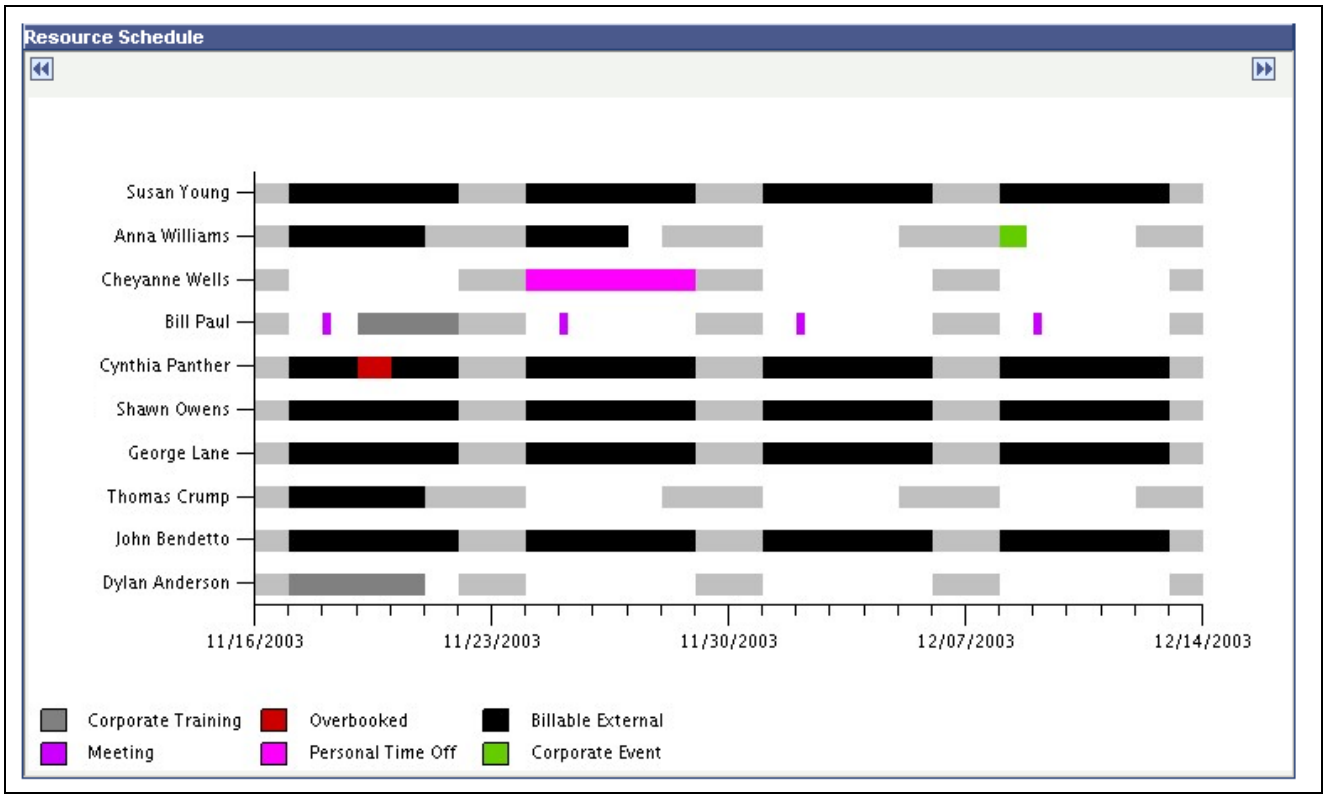
The Unassigned Resources chart represents the assignment status of the resources who appear in the active filter. You specify the threshold on the My Workbench Options - Utilization page that determines when a worker is treated as assigned. The chart displays the percentages of resources who are assigned and unassigned for the next four weeks, with navigation icons to scroll to the next or previous four-week period.

Move the cursor 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 group box 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.

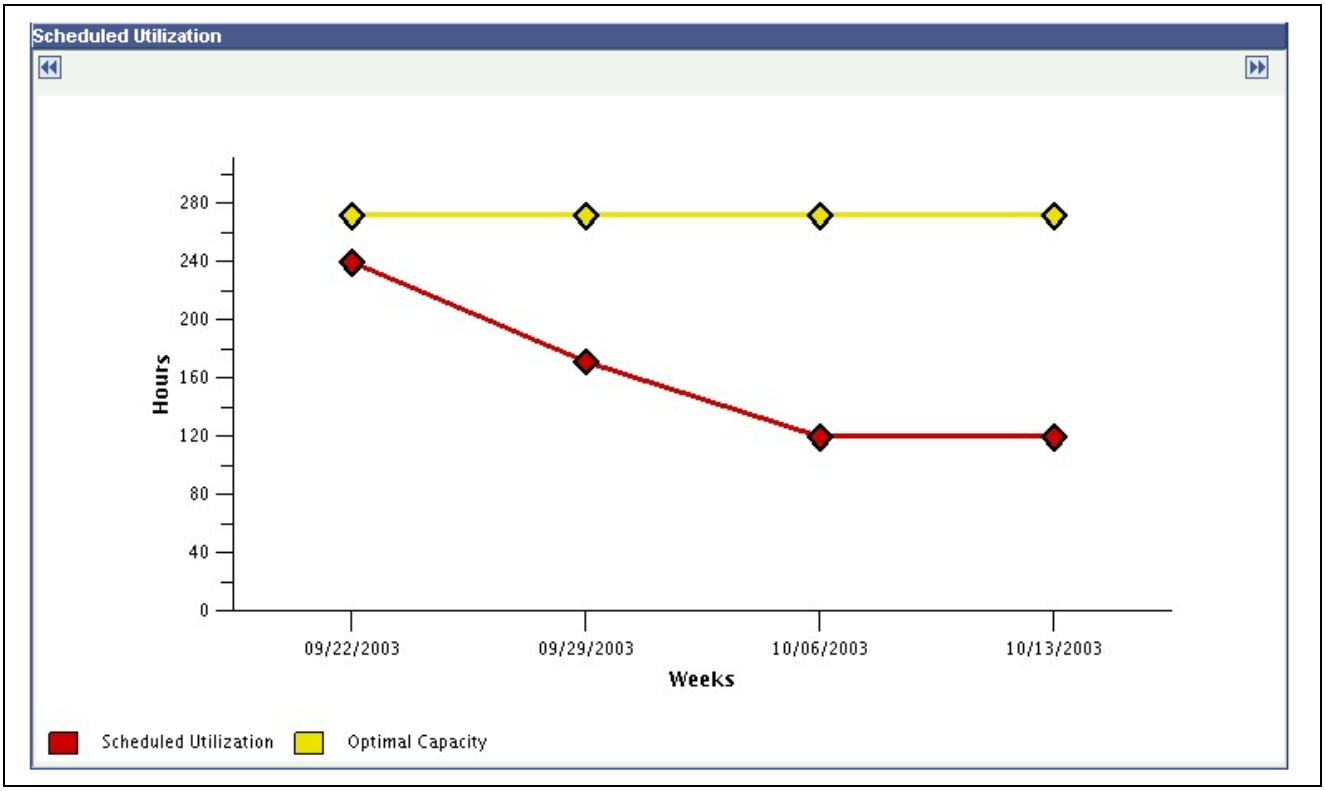
Click the overbooked time to access the Assignments for <Resource> page to view a list of the resource's existing assignments in any status. Click Cancel to return to the workbench.

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 group box 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 group box 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 group box 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.

Defining Supply Category Analytics

This section provides an overview of supply category analytics and discusses how to:

- Select resource pools for analytics.
- Search for resource pools.
- View supply category analytics.
- View analytic details.
- View resource details in the master resource schedule.

Understanding Supply Category Analytics

One of the key tools for an IT organization is the ability to view supply category capacity, allocation, and availability of resources by time period at the organizational and resource pool level. It is also important to be able to view project assignments as well as task assignments on the resource usage analytic.

Pool managers can quickly and easily view the availability of the resources in their pool for a given time period. The supply category analytic can be generated for a maximum of six months.

Pages Used to Define Supply Category Analytics

Page Name	Object Name	Navigation	Usage
Supply Category Analytic parameters	RS_OCP_POOL_SELECT	Resource Management, Manage Resource Pools, Supply Category Analytics	Select pools from which to include data for supply category analytics. Define the start date and number of months to display as well as data sorting options.
Search for Pools	RS_OCP_POOL_SEARCH	Click the Search for Pools link on the Supply Category Analytic parameters page	Search for pools to add to the supply category analytics.
Supply Category Analytic	RS_OCP_ANALYTIC	Click the View Supply Category Analytic button on the Supply Category Analytic parameters page.	View the supply category analytics.
Supply Category Analytic Details	RS_OCP_ANALYTIC_DTL	Click the View Details button on the Supply Category Analytic page.	View detail supply category analytic data.
Master Resource Schedule	PGM_MRS_SCHED	Click the View Selected In Master Resource Schedule button on the Supply Category Analytic Details page.	View the supply details in the master resource schedule.

Selecting Resource Pools for Analytics

Access the Supply Category Analytic parameters page.

Start Date Enter the month and year from which the supply category analytic is to be generated and displayed.

Show Enter the time frame for which the analytic is to be generated, from *1 month* to *6 months*.

Search Options Expand this group box and select attributes to drive how the analytic data is grouped and displayed, using the Sort By and Then By fields to specify a supply category. You can select a primary and a secondary driver to generate and view the data using the Group By and View In choices.

Select Pools Select the respective check boxes for each Pool Name for which the analytic is to be generated from the displaying pool hierarchy. All active resource pools in the system display. If you select a parent pool, the system will automatically select its children as part of the analytic scope. You can select child pools independent of the parent pool.

Searching for Resource Pools

Access the Search for Pools page.

Search for Pools You can search on Description, Pool Manager, and Pool ID to find and select pools to add to your analytics. The search results display in the Search Results group box. The display of pools is not hierarchical.

Select Select the check box for each pool in your search results that you want to add to the scope for generating the supply category analytic

Add to Selected Pools Click this button to add the additionally selected pools to the Supply Category Analytic parameters page.

Remove From Selected Pools Click to remove selected pools from the Supply Category Analytic parameters page. Only the pools listed on that page are in the scope for generating supply category analytic.

Viewing Supply Category Analytics

Access the Supply Category Analytic page.

(check box) Select the check box for the rows into which you want to drill down.

Note. If you sort by *Region* then by *Project Role,* then when you select a region, all roles under that region are selected.

<Pool/Region> This column is dynamic; your Sort By and Then By selections dictate the column title.

Capacity When the Sort By selection is *Region,* and the Then By selection is *Role,* for example, this column displays the capacity of each role in the region for each calendar week for the time frame between the start month and the end month.

Note. The Start Month and the View In unit also display in the column heading.

Requested When the Sort By selection is *Region,* and the Then By selection is *Role,* for example, this column displays the requested days for each role in a region for each calendar week for the time frame between the start month and the end month.

Assigned When the Sort By selection is *Region,* and the Then By selection is *Role,* for example, this column displays the assigned days for each role in a region for each calendar week for the time frame between the start month and the end month.

Available When the Sort By selection is *Region,* and the Then By selection is *Role,* for example, this column displays the difference between capacity and assigned days for each role in a region for each calendar week for the time frame between the start month and the end month.

View Details Click this button to view the details for the resources you selected with the check boxes, which make up the capacity for a supply category.

Viewing Analytic Details

Access the Supply Category Analytic Details page.

(check box) Select the resources to be included in the resource scope of the master resource schedule. You can select the desired rows and click the View Selected In Master Resource Schedule button to view the schedule of the selected resources. If the analytic is generated for supply categories Pool and Role, if you select the pool node all resources in that pool will be selected. If you select a role node, all the resources in that pool with the selected role will be selected.

Role/Region/Resource Displays the role (such as *Database Administrator*), the region (such as *East*), or the resource as applicable.

Capacity When the Sort By selection is *Region,* and the Then By selection is *Role,* for example, this column displays the capacity of each resource in each role in the region for each calendar week for the time frame between the start month and the end month.

Note. The Start Month and the View In unit also display in the column heading.

Requested When the Sort By selection is *Region,* and the Then By selection is *Role,* for example, this column displays the requested days for each resource in each role in a region for each calendar week for the time frame between the start month and the end month.

Assigned When the Sort By selection is *Region,* and the Then By selection is *Role,* for example, this column displays the assigned days for each resource in each role in a region for each calendar week for the time frame between the start month and the end month.

Available When the Sort By selection is *Region,* and the Then By selection is *Role,* for example, this column displays the difference between capacity and assigned days for each resource in each role in a region for each calendar week for the time frame between the start month and the end month.

View Selected In Master Resource Schedule Click this button to view the schedule of the selected resources.

Viewing Resource Details in the Master Resource Schedule

Access the Master Resource Schedule page.

This page and its fields are discussed in the Program Management PeopleBook.

As resources are added or moved to different pools, or requested or assigned to assignments, the cache table must be updated so the data remains up-to-date. It is important to run the processes that load the cache tables from which the Supply Category Analytic obtains data.

To do this, select Set Up Financials, Common Definitions, Resource Search, Cache Administration, Miscellaneous and select the Refresh Supply Category Analytics Cache check box. Then click the Summary tab and run the process.

See Also

PeopleSoft Enterprise Program Management 8.9 PeopleBook, "Scheduling and Managing Resources," Working with Master Resource Schedules

CHAPTER 27

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 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 (RS_ASSIGN_APRVL)
Date Change For Approval	Assignment schedule change requires approval by the resource manager.	Resource Manager	Assign Resource approval
New Assignment Created	Notification of new assignment.	Resource	Assign Resource review and schedule update (RS_ASSIGN_UPDDTS)
Assignment Status Change	Notification of assignment status change.	Resource	Assign Resource review and schedule update
Assignment Date Change	Notification of assignment schedule change.	Resource	Assign Resource review and schedule update

Worklist Action	Description	User	Target Pages
Recommendation Made	Notification of a resource recommendation to fulfill a resource request.	Resource	Job Detail (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 (RS_SO_SUMMARY)
Generic Resource for Approval	Generic resource request is ready for review and approval by pool manager.	Pool Manager	RS_GRR_APPRVL
Date Change for Approval	Generic resource allocation schedule change requires approval by the resource manager.	Pool Manager	RS_GRR_APPRVL
Status Change for Approval	Generic resource request resubmitted.	Pool Manager	RS_GRR_APPRVL

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 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 the You currently have <n> unworked items in your worklist link on the Staffing Workbench - Fulfill Orders page. • Resource Management, Staffing Workbench, Manage Utilization Click the You currently have <n> unworked items in your worklist link on the Staffing Workbench - Manage Utilization page. • Resource Management, My Assignments, Worklist • Resource Management, My Assignments, Assignments Click the You currently have <n> unworked items in your worklist link on the My Assignments - Assignments page.	Review and process assigned worklist items. A variety of worklist items can appear, including items that originate from sources other than Resource Management.
Worklist - Worklist for <User ID>: <Resource>	WORKLIST	• Worklist, Worklist • Click Worklist from the PeopleSoft universal navigation header. • Click the Summary View link from the Worklist Details - Worklist for <User ID>: <Resource> page.	View, assign priority to, reassign, and process worklist items.

Page Name	Object Name	Navigation	Usage
Worklist Details - Worklist for <User ID>: <Resource>	WORKLIST_DETAILS	• Worklist, Worklist Details • 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.

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, such as *Route to Staffing Person.* You can have multiple entries with the same action, but each entry represents a different item that requires attention.

Link Click a Details link in this column 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 *Recommendation Made,* the link accesses the Job Detail page, where you can view information about the resource request.

Mark Worked Click an icon in this column to mark an item as worked if you have performed the necessary actions. This removes items that 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 the *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," *Using PeopleSoft Applications PeopleBook*

CHAPTER 28

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

The My Assignments feature presents a self-service view of 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 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

Job Spy is a 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 • Set Up Financials/Supply Chain, Product Related, Resource Management, 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.

Operator Id Displays the user ID of the resource who has logged in to the session.

Weekly Schedule Select this check box to display your weekly schedule on the My Assignments - Assignments page.

Chart Resource Schedules Select this check box to display a Gantt chart of your four-week schedule on the My Assignments - Assignments page.

Scheduled Utilization Select this check box 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, *80* 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

The My Assignments page opens to a list of existing assignments. You can drill down to view current or previous assignment details in the Current and History views. Clicking the Bids and Recommendations links enables you to 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 these views. The chart-viewing options that you define on the My Assignments Options page appear at the bottom of the page.

You can drill down to view current or previous assignment details using the Current and History links. You can view summary information or details of resource requests for which you have bid or been recommended by clicking the Bids and Recommendations links. When you click a link, 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.

This section discusses how to:

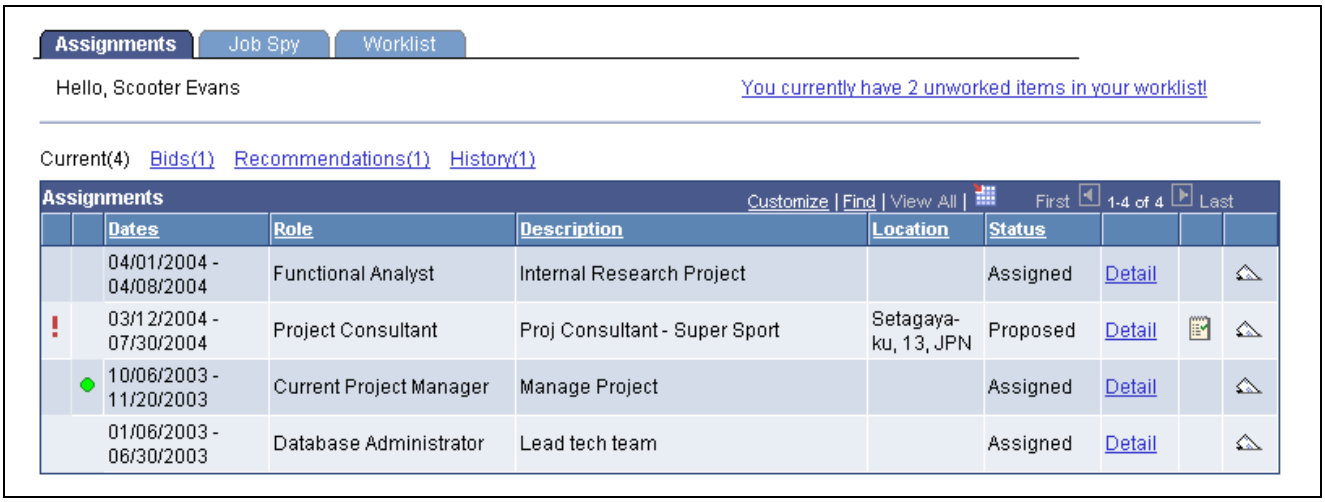
- Review your assignments.
- Filter the assignment list.
- View assignment details.
- View resource request job details.
- Send comments to your manager.
- View your resource schedule and utilization charts.

Pages Used to Work with Assignments

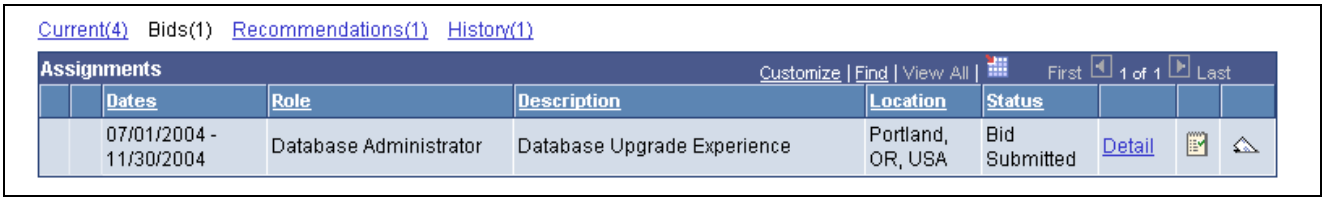
Page Name	Object Name	Navigation	Usage
Assignments	RS_MYASSIGNMENTS	Resource Management, My Assignments, Assignments	Review your existing assignments and send comments to your manager.
Assign Resource	RS_ASSIGN_UPDDTS, RS_ASSIGN_MAIN	• Click Detail on an assignment row in the Current or History view on the My Assignments - Assignments 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 view 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 the View Job Scorecard icon 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

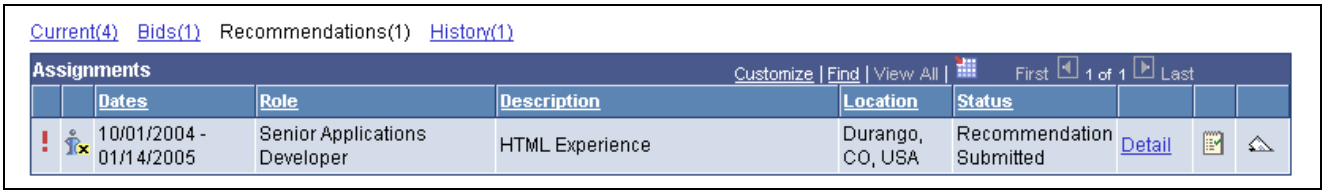
Access the Assignments page.



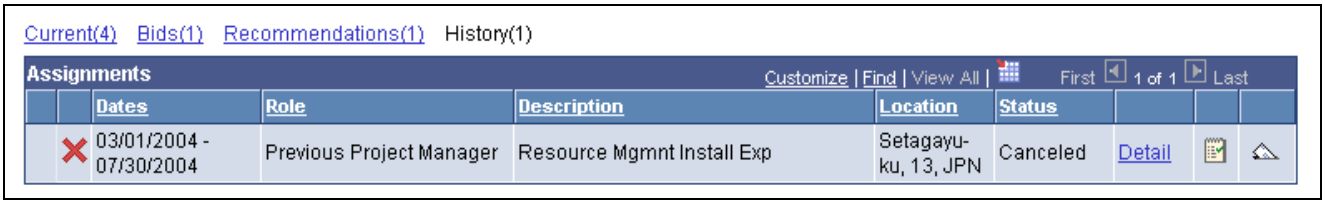
Current view on the My Assignments - Assignments page



Bids view on the My Assignments - Assignments page



Recommendations view on the My Assignments - Assignments page



History view on the My Assignments - Assignments 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 view or process items that are routed to you from workflow. The My Assignments - Worklist page is discussed later in this chapter.

Current Click this link 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 this link 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 this link 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 this link to view a list of your assignments that have the following statuses: • *Completed* • *Canceled* • *Rejected*

Assignments

Rows in the Assignments group box provide the following summary information about assignments (in the Current or History view), about resource requests for which you have placed a bid (in the Bids view), or about resource requests for which you have been recommended (in the Recommendations view).

	Indicates that 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 view. Click this icon to view the Worklist page.
	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 view.
	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 view.
	This visual indicator may appear in the Recommendations or History view. In the Recommendations view, it indicates that the resource request is canceled. In the History view, it indicates that the assignment is canceled.
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 view. In the Current or History view, the column displays your assignment status. In the Bids or Recommendations view, the column displays the status of your bid or recommendation.

Detail

The destination of this link changes based on the view. In the Current or History view, 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 21, "Assigning Resources," Creating Assignments, page 256.

In the Bids or Recommendations view, 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 in the Current view.

See Chapter 24, "Fulfilling Service Orders," Viewing Open Resource Requests, page 313.

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 21, "Assigning Resources," Viewing the Job Scorecard, page 267.

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.

For each assignment row, you can view visual indicators and summary information about an assignment or resource request. Each assignment or resource request row displays one of the following visual indicators:

Charts

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
  - 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.

Note. Your schedule appears for the current week.

- Resource Schedule
  - 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.

Note. The Resource Schedule chart displays your schedule for a four-week period beginning with the current date. Task categories and corresponding chart colors are specified during implementation on the Installation Options - Resource Management page.

- Scheduled Utilization
  - 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.

Note. The task categories that the system takes into account are specified during implementation. You specify them on the Installation Options - Resource Management page. 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.

Viewing Assignment Details

Access the 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.

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.

Note. Your manager appears as the addressee on the page. 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.

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.

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.

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
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 score link in the Qual. or Avail. column on an assignment row. • Click View Job Scorecard in the Bids view or Recommendations view 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 view 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

Access the Job Spy page.

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.

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.

Owning Organization — Select this radio button 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 — Select this radio button to have the Resource Matching feature evaluate all open resource requests as potential matches for you.

Search — Click this button 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.

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.

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 21, “Assigning Resources,” Viewing the Job Scorecard, page 267.

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 this link to access the Job Detail page and review available information about the resource request and service order.

Submit Bid — Click this button to access the Bid Confirmation page and submit a bid for this resource request.

Submitting Bids

Access the 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 26, “Managing Resource Utilization,” Evaluating Resource Requests, page 355

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. • Resource Management, My Assignments, Worklist	Review and process worklist items that are assigned to you.

Managing Worklist Items

Access the Worklist page.

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 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 Resource Management. The actions that generate workflow actions or notification messages are specified during 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 27, “Processing Worklist Items,” page 367

CHAPTER 29

Conducting Capacity Planning

This chapter provides an overview of capacity planning, lists prerequisites, and discusses how to:

- Set up capacity planning.
- Create a supply forecast model.
- Create a demand forecast model.
- Conduct consolidated scenario analysis.

Understanding Capacity Planning

Capacity Planning is an integral piece of functionality for the Project Portfolio Management (PPM) and Information Technology (IT) governance markets. It is the merger and balance of human resources (supply) and work to be done (demand) to achieve and sustain peak operational efficiency.

Resource Management provides IT and development organizations with capacity planning functionality to empower managers who make important demand commitment decisions based upon limited resources or capacity information. Capacity Planning is primarily concerned with long-term projections and decisions about your organization's resource demand and supply.

Once IT and development organizations have made important demand commitment decisions based upon their strategic capacity planning, pool managers, resource managers, and program managers need to execute upon those commitments. At an operational or day-to-day level, difficult resource decisions need to be made over the course of a project to be successful. Some operational challenges—such as high resource turnover rates, extended vacations or illness on the part of key resources—cannot be forecast with Capacity Planning.

By logically grouping resources together, resource pools enable efficient resource management, while supply categories allow for classification of resources more interchangeably. Generic resource allocation enables managers to reserve pool capacity, and supply category analytics improve visibility of resource capacity.

Important Capacity Planning terms include:

Supply Forecast	A supply forecast is an aggregated projection of all labor resource capacity based on resource pool headcount forecasts and capacity.
Demand Forecast	A demand forecast is an aggregated projection of all labor resource demand from projects and external data sources.
Commitment Line	A commitment line is the point at which a prioritized list of demand is separated into committed versus deferred.
Capacity Planning Consolidated Scenario	A complete capacity planning scenario consists of a version of the supply forecast, a version of the demand forecast, a commitment line and list of assumptions.

Supply Categories	A supply category is a specific resource attribute that is commonly used for capacity planning, availability and reporting purposes. The supply categories are project role, region, resource pool, and personnel status.
Resource Pools	A resource pool is a collection of resources distinctly different from a project team or HR department that is used for management and planning purposes. Resource pool setup is influenced by resource organization and can be based on such factors as location, job function, team, application, and so on. An administrator or pool manager defines the resource pools in the system, and pool managers manage the resources within the pools.
Project Manager	A project manager is responsible for the planning, estimating, resourcing, and execution of a project.
HR Manager	An HR manager is responsible for the budgeting, supervision, and performance review of a group of resources that is typically assigned to a department or cost center.
Resource Pool Manager	A resource pool manager is responsible for the management and capacity planning of a group of resources.

This section discusses:

- Resource pools.
- Capacity planning.

Resource Pools

Resource pool setup is an integral part of capacity planning, and is based on how your company wants to organize your resources based on such factors as location, job function, team, application, and so on. An administrator or pool manager defines the resource pools in the system, and assigns a manager for each pool. A pool manager can then add, update, or remove resources from pools.

Capacity Planning

Capacity Planning enables the chief-level and IT management to commit to the highest priority projects and other demands with confidence, knowing that sufficient resource capacity exists within the organization. Capacity planning provides management with:

- The ability to create and join a supply and demand forecast that highlights future resource gaps and gluts.
- The flexibility of performing what-if scenario analysis to find the optimal solution set.
- The ability to create resource plans to resolve future resource imbalances.

The capacity planning process can be described in this way:

1. Executives organize resources into meaningful resource pools and set resource utilization percentages at the regional level.
2. Pool managers forecast capacity percentages for each resource role in their pool and account for future capacity.
3. The program manager creates the initial supply forecast model showing total capacity for each resource pool by using the capacity percentages combined with the preset region-based utilization percentages.
4. Once a supply forecast is created, executives can adjust capacity and regional utilization percentages to create different supply forecasts from the original model to analyze alternate scenarios.

5. The program manager creates the initial demand forecast, which is combined with supply forecasts to create consolidated scenarios for what-if analysis.

   The flexibility of this conditional analysis helps management determine the optimal balance of available resources and pending work for the projected time period.

The project manager can add generic resources with supply categories to the project resource list and requests assignments. The project manager then creates a generic resource request, and has the option to automatically request generic and named resources during Microsoft Project (MSP) integration. The pool managers can view supply category capacity, allocation and availability by week at the pool and role level. The project manager can view individual resource availability based on project assignments and activity assignments. Once pool managers have viewed the supply category analytic information, they can transfer resources from one pool to another pool, or do a mass transfer of assignments from one resource to another resource. The pool managers can then update generic allocations to named resource assignments.

Prerequisites

This section lists prerequisites to implementing capacity planning:

- These applications must be installed: PeopleSoft Project Costing, PeopleSoft Program Management, and PeopleSoft Resource Management.
- PeopleSoft Expenses must be installed for time reporting and policy time functionality so that historical policy time submitted for the preceding year can be accessed for the region utilization percentage.

Setting Up Capacity Planning

This section provides an overview of resource utilization percentages and discusses how to:

- Use the Strategic Capacity Planning Home page.
- Associate business units with regions.
- Set up resource utilization percentages by region.
- Set up capacity planning options.

Understanding Resource Utilization Percentages

Before you can create a supply forecast you must set up resource utilization percentages. The system enables you to view the historical utilization percentage of the resources and to set a new percentage to create a supply forecast model.

Utilization percentage consists of defining a region, associating time reporting business units and time reporting codes to a region, and setting a utilization percentage default per region.

Note. Region is a supply category.

The Link Regions to Business Units component (RS_REGION_BUEX)includes the mapping of PeopleSoft Expenses business units and setIDs to the region code. The Utilization Percentage Definition component (RS_REGION_UTIL) includes a breakdown of historical and default utilization percentages based on the setID's time reporting codes (TRCs) for that region. The component searches the preceding year's reported timesheets to gather the historical information for display on this page.

Note. The historical utilization percentage is an approximation and is mainly used for the creation of the supply forecast.

Pages Used to Set Up Capacity Planning

Page Name	Object Name	Navigation	Usage
Strategic Capacity Planning Home	RS_SCP_HOMEPAGE	• Resource Management, Strategic Capacity Planning, Strategic Capacity Home • Click a Capacity Planning Home link from any page in the component.	Provides a centralized location for strategic capacity planning activities, and lists the last five supply, demand, and consolidated scenario analysis forecasts accessed by the user.
Region Codes	REGION_CD	Set Up Financials/Supply Chain, Common Definitions, Location, Region Codes	Set up region codes under the Region Category ID of *Resource Management*. **Note.** If you do not want to use regions, set up an *Unassigned* region for each setID and use that as the value when defining the Region supply category for a resource. See PeopleSoft Financials, Enterprise Service Automation, and Supply Chain Management Application Fundamentals 8.9 PeopleBook, Defining Financials and Supply Chain Management Common Definitions, Establishing Regions and Region Codes
Region Type Codes	REGION_TYPE	Set Up Financials/Supply Chain, Common Definitions, Location, Region Type Codes	Set up region types. See PeopleSoft Financials, Enterprise Service Automation, and Supply Chain Management Application Fundamentals 8.9 PeopleBook, Defining Financials and Supply Chain Management Common Definitions, Establishing Regions and Region Codes

Page Name	Object Name	Navigation	Usage
Link Regions to Business Units	RS_REGION_BUEX	Set Up Financials/Supply Chain, Product Related, Resource Management, Utilization Percentage, Link Regions to Business Units	Select the PeopleSoft Expenses business units to map to each region. The system calculates the historical utilization percentage of resources per region. An Expenses business unit can belong to only one region. All Expenses business units within a region must have the same SetID.
Define Utilization Percentages	RS_REGION_UTIL	Set Up Financials/Supply Chain, Product Related, Resource Management, Utilization Percentage, Define Utilization Percentages	Define utilization percentages for each region's policy time reporting codes. The system will initially calculate the utilization percentage based on the time logged by resources in that region to the policy time codes over the course of the previous year and display it on this page. You can use that calculated utilization percentage as a reference point in setting the actual region utilization percentage that will be used in capacity planning.

Page Name	Object Name	Navigation	Usage
Installation Options - Resource Management	INSTALLATION_RS	Set Up Financials/Supply Chain, Install, Installation Options Click the Resource Management link.	Select the default unit of measure display and conversion for resource work within the Capacity Planning Setup group box. In addition, verify that the scheduling options are set up appropriately for the default work days and standard hours per day. See *PeopleSoft 8.9 Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management: Setting Installation Options for PeopleSoft Applications, Setting Up PeopleSoft Resource Management Installation Options* **Note.** This page is also used for specifying the default capacity planning region. The system uses this region as the default when you add effort to a demand forecast or combined scenario analysis.

Managing Strategic Capacity Planning

Access the Strategic Capacity Planning Home page.

Consolidated Scenario Analysis

Click a link in the Scenario column to view details of that scenario.

Create New Scenario Click this link to create a new consolidated scenario.

Find Existing Scenario Click this link to view a particular consolidated scenario.

Supply Forecast

Click a link in the Supply Name column to view details of that supply forecast.

Create New Forecast Click this link to create a new supply forecast.

Find Existing Forecast Click this link to view a particular supply forecast.

Copy Forecast Click this link to copy a particular supply forecast.

Demand Forecast

Click a link in the Demand Name column to view details of that demand forecast.

Create New Forecast Click this link to create a new demand forecast.

Find Existing Forecast Click this link to view a particular demand forecast.

Copy Forecast Click this link to copy a particular demand forecast.

Associating Business Units with Regions

Access the Link Regions to Business Units page.

Business Unit Select from a list of Expenses business units that are not yet associated with a region.

Note. Business units that are already associated to a region do not appear in the list .

Note. Region is a required supply category for all Resource Management resources.

See Also

Chapter 13, "Establishing Resources," Establishing and Maintaining Employees and Non-Employees as Resources, page 128

Setting Up Resource Utilization Percentages by Region

Access the Define Utilization Percentages page.

Time Reporting Code Displays the TRCs for each region. The system obtains the policy time codes using the business units that were linked to that region on the Region Codes page.

Utilization % (utilization percentage) The utilization percentage that initially shows as the default value is the historical utilization percentage, but it can be overridden.

Note. If you change the Utilization % after a forecast is saved, the forecast will not be affected.

Historical Utilization %(historical utilization percentage) Displays the percentage of total time reported by the resources in the region for each TRC for the previous year in PeopleSoft Expenses.

Total Utilization %(total utilization percentage) This value is calculated by subtracting all Utilization % rows from 100 percent and returns the final utilization to be used within strategic capacity planning (SCP) models.

Total Historical Utilization %(total historical utilization percentage) This value is calculated by subtracting all Historical Utilization % rows from 100 percent and returns the final historical utilization. It assists management with determining the proper utilization value to set.

Setting Up Capacity Planning Options

Access the Installation Options - Resource Management page.

Note. This information appears in the bottom section of the Installation Options - Resource Management page.

Default UOM Display	Select the unit of measure that determines whether the effort is in *Hours* or *Days*. If you select to display the information by hours, all of the capacity planning data will be provided with the primary display and update fields in hours.
Standard Hours per Work Day	This value is obtained from the resources data setup accessed by selecting in Set Up Financials/Supply Chain, Common Definitions, Resources Data, Resource Setup. This indicates the standard number of hours in one work day. The value is not editable on the Installation Options - Resource Management page.
Standard Work Days per Month	Enter the number of work days in a month. Typically, 21 or 22 days equals one full month.
Work Days to Full Time Resource	Enter the number of days that could be translated into a single full-time resource. Typically this value is the same as the standard work days per month.
Default Capacity Planning Region	Specify the Region SetID and Region Code to use in combined scenario analysis.

See Also

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up Resource Management Installation Options

Creating a Supply Forecast Model

This section provides an overview of the supply forecast model and discusses how to:

- Create supply forecasts and select pools.
- Add pools to forecasts.
- Review supply forecasts.
- View supply forecast details.
- Modify supply forecasts.
- Add new supply.
- Modify region utilization.
- Modify forecast history.
- Analyze supply.
- View supply forecast charts.
- Copy supply forecasts.

Understanding the Supply Forecast Model

Supply is made up of human resources available to do work. A supply forecast is an aggregated projection of all labor resource capacity based on resource pool headcount forecasts and utilization. A supply forecast model provides an organization with a way to gain an accurate, concise picture of its forecasted resource capacity over a period of time.

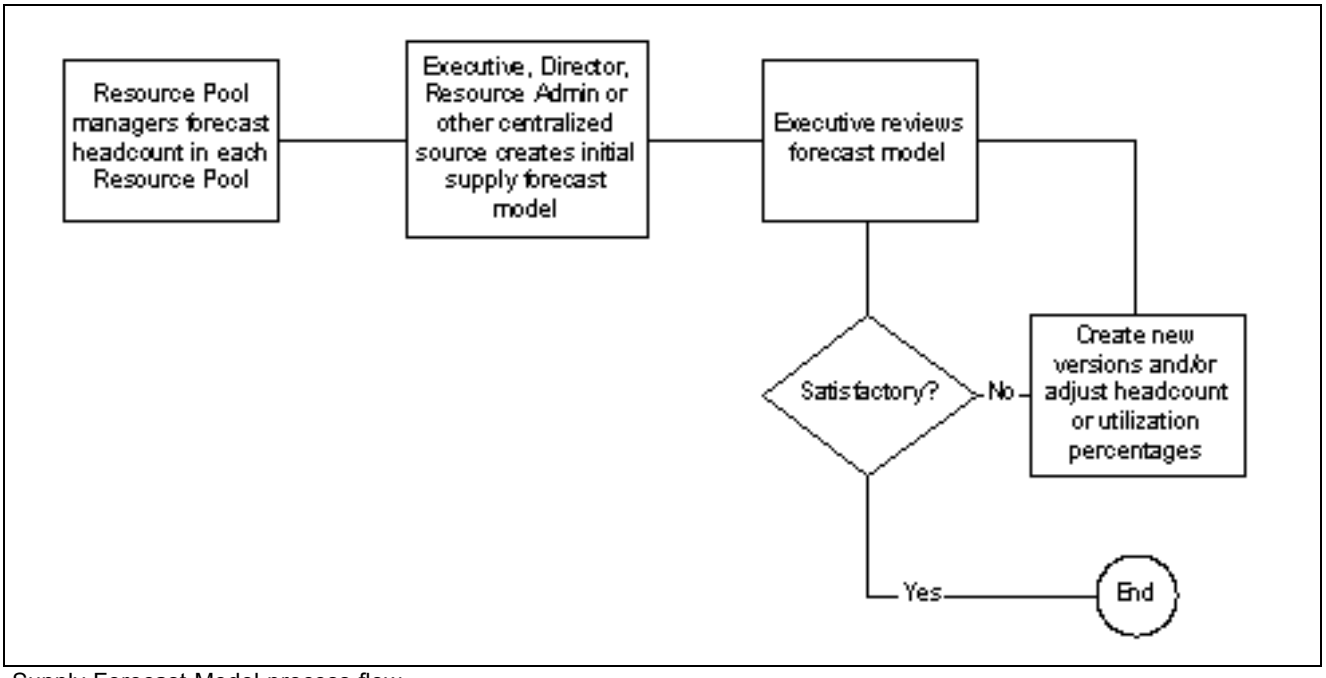
Once resources are grouped in resource pools, pool managers can define a capacity percent for each resource (named or generic) in their pool and account for future capacity in those resource pools. This information combined with the preset, region-based utilization percentage to create a supply forecast that calculates the total capacity for each resource pool. Three other supply categories (role, region, and personnel status) further segregate the data.

The system also calculates the capacity of each resource (named and generic) within each of the selected pools for the selected date range. The data is presented in a summarized format and initially displayed by pool and role (within each pool). You have the option to view the data by other supply categories as well as in graphical format. In addition, you can view the resource information using PeopleSoft Analytic Calculation Engine interactive analysis.

The maximum range for supply forecasting is 24 months.

Note. All data in supply forecasts, demand forecasts, and consolidated scenarios is "point-in-time." This means that if additional resource pools or demand data change or become available on the transactional side, it will not affect any existing forecasts or scenarios—unless you specifically choose to add them afterwards. In other words, forecasts are created based on the picture of the supply and demand as of the date the forecast was created. If pools and capacity are added a week later, for example, that information will not appear in the supply forecast. You can manually add the supply or new resource pools to the forecast or create a new forecast to capture the latest supply data.

This flowchart shows the supply forecast model process:



Supply Forecast Model process flow

You use the Supply Forecast component (RS_FR_SUPPLY) to create, view, and modify supply forecasts.

Resources and Capacity Calculations

There are some important things to note about resources and creating supply forecasts.

Resources Without Roles

Because role is not a required supply category for a resource, it is possible that the forecast will encounter resources that do not have a role specified. If the forecast encounters any resources with a blank Role field, the system displays the capacity for these resources with a label of *Undefined Role.* For example, this table lists the resources within Pool A:

Name	Role	Capacity
Michael Fontes	DBA	100 days
Serena Clemens	DBA	120 days
Kelly Orihood	QA	100 days
Justine Yee		50 days
Christopher Brown		75 days

The capacity is broken down as follows:

- DBA - 220 days
- QA - 100 days
- Undefined Role - 125 days

Resource Capacity Calculations

The system calculates capacity in either hours or days. Organizations decide at the installation level if they will display and calculate capacity in hours or days. Capacity is calculated by selecting each resource that is part of the selected pools for the time period that the forecast is being created. Next, the system looks up the Capacity percentage that was set in that pool for each resource. The capacity is multiplied by the number of days or hours in the forecast period. Finally, a utilization percentage (based on the resource's region) is applied. Therefore:

capacity = (resource pool capacity percentage) × (number of days or hours in period) × (utilization percentage)

The following scenarios show how capacity is calculated. This table presents the information that is used in the subsequent scenarios:

Supply Forecast Period	June, 2004 - May, 2005 (12 months)
Display capacity in:	Days (Installation setting)
Number of hours in a day:	8 (Installation setting)
Number of days in a month:	20 (Installation setting)
One full-time resource:	20 (Days per month = one full- time resource)
Utilization percentage for USA:	85 percent

Scenario 1: Resource is in one pool with the same pool capacity percentage for the entire period.

Parameter	Value
Resource name	Generic
Role	DBA
Pool capacity percentage	100
Region	USA

(pool capacity percentage) × (number of days or hours in period) × (utilization percentage)

1. 0 × (20 days × 12 months) × 0.85 = 204 days of capacity for the period

Scenario 2: Resource is in one pool with one pool capacity percentage for one full month and another pool capacity percentage for rest of the period.

Parameter	Value
Resource name	Alysha Kibble
Role	QA Lead
Pool capacity percentage	50 (6/1/04 - 6/30/04) 100 (7/1/04 - no end date)
Region	USA

(pool capacity percentage) × (number of days or hours in period) × (utilization percentage)

06/01/04 – 06/30/04: 0.5 × (20 days x 1 month) × 0.85 = 8.5 days of capacity

07/01/04 – 05/31/05: 1.0 × (20 days x 11 months) × 0.85 = 187 days of capacity

Total capacity for the forecast period is 195.5 days.

Scenario 3: Resource is in one pool with one pool capacity percentage for a partial month and another pool capacity percentage spanning multiple months.

Parameter	Value
Resource name	Corinne Brown
Role	Project Manager
Pool capacity percentage	50 (6/1/04 - 7/21/04) 100 (7/22/04 - no end date)
Region	USA

This scenario is one of the more complicated situations that may be present. The dates are broken down monthly (or by fractions of months when the capacity changes mid-month):

(pool capacity percentage) × (number of days or hours in period) × (utilization percentage)

06/01/04 – 06/30/04: 0.5 × (20 days x 1 month) × 0.85 = 8.5 days of capacity

07/01/04 – 07/21/04: 1.0 × (20 days x 0.68 month) × 0.85 = 5.8 days of capacity

07/22/04 – 07/31/04: 1.0 × (20 days x 0.32 month) × 0.85 = 5.4 days of capacity

08/01/04 – 05/31/05: 1.0 × (20 days x 10 months) × 0.85 = 170 days of capacity

Total capacity for the forecast period is 189.7 days.

Supply full-time resource takes into account all the regions found in the supply forecast. For example, if the number of days is 6000, the region utilization percent is 80 (since each region can have a different percent each one would have to be included in the calculations), the days per month for a full-time resource is 20, and the number of months in the scenario date range is 12, the calculation would be:

6000 days / 0.80 / 20 days / 12 = 31.25 full-time resources.

Note. Full-time resources are calculated differently between the Supply Summary page and the Supply Details page.

Pages Used to Create and Modify a Supply Forecast

Page Name	Object Name	Navigation	Usage
Supply Forecast - Select Pools	RS_FR_SUP_SEL_POOL	Resource Management, Strategic Capacity Planning, Supply Forecast Click the Continue Selecting Pools link in an existing Supply Forecast.	Add a new supply forecast and select the pools to add to the supply forecast.
Search for Pools	RS_FR_POOL_SRCH	Resource Management, Strategic Capacity Planning, Supply Forecast Click the Continue Selecting Pools link in an existing supply forecast. Click the Search for Pools link on the Select Pools page.	Search for pools by pool name, pool manager, or pool ID to be added to the supply forecast.

Page Name	Object Name	Navigation	Usage
Supply Forecast	RS_FR_SUP_SUMMARY	Resource Management, Strategic Capacity Planning, Supply Forecast	View the summarized information for a supply forecast. The page contains links to all the other supply forecast functions. When you have selected the pools that you want to include in the supply forecast, you can view the calculated capacity for all the resources (generic and named resources) that are in the selected resource pools. The data is summarized first by pool and then by role.
Supply Forecast Detail	RS_FR_SUP_DTL	• Resource Management, Strategic Capacity Planning, Supply Forecast, Supply Forecast Detail • Click the View Supply Forecast link on the Supply Forecast - Select Pools page. Click the Total link on the Supply Forecast page. • Select the Supply Details tab. • Click a Pool Name in the supply summary.	View the supply details for all of the pools or one particular pool in the supply forecast.
Modify Supply in Forecast	RS_FR_SUP_MOD_SUP	• Resource Management, Strategic Capacity Planning, Supply Forecast Click the Total link on the Supply Forecast page Click a link in the Role column. • Click a pool name link in the Pool/Role column on the Supply Forecast page. Click a link in the Role column.	Add or subtract the actual supply in the forecast to, for example, model different scenarios for a given calculated resource pool role row.

Page Name	Object Name	Navigation	Usage
Add New Supply To Forecast	RS_FR_SUP_ADD_SUP	Resource Management, Strategic Capacity Planning, Supply Forecast Click the Add New Supply button.	Add additional supply to a forecast. **Note.** The system validates the dates you enter to ensure that the start date is not greater than the end date and that the date range does not exceed 24 months. When adding a new value, you can manually enter the supply forecast ID or the system can generate it.
Modify Region Utilization	RS_FR_SUP_UTIL	Resource Management, Strategic Capacity Planning, Supply Forecast Click the Modify Region Utilization button.	Change the utilization percentage for a forecast.
Supply Forecast Modification History	RS_FR_SUP_MOD	Resource Management, Strategic Capacity Planning, Supply Forecast Click the Forecast Modification History link.	View details of modifications made to supply forecasts.
Supply Analysis	RS_SUP_ACE_PAGE	Resource Management, Strategic Capacity Planning, Supply Forecast Click the Supply Analysis link.	Dissect and scrutinize supply forecast data by supply categories by month and additional supply categories.
View Supply Forecast Charts	RS_SUP_CHARTS	Resource Management, Strategic Capacity Planning, Supply Forecast Click the Supply Summary Charts link.	View graphical summarized capacity information by supply category.
Copy Forecast	RS_FR_COPY	Resource Management, Strategic Capacity Planning, Strategic Capacity Home Click a Copy Forecast link in either the Supply Forecast or Demand Forecast group box.	Create copies of existing forecasts with same date range as the original forecast. **Note.** You can use this page to copy supply or demand.

Creating Forecasts and Selecting Pools

Access the Supply Forecast - Select Pools page.

Select Select this check box to designate that a pool is selected for the forecast. When you select a pool that has child pools, all the child pools should be selected as well. You can clear a parent pool without clearing the associated child pools.

Pool Name The description of the available pools from which to select.

Manager Name	The name of the pool's manager.
Add To Supply Forecast	Click this button to add the selected pools to the supply forecast.
Remove From Supply Forecast	Click this button to remove the selected pools from the supply forecast.
Search for Pools	Click this link to access a page where you can provide pool name, pool manager name, and pool ID criteria to limit the search and selection of specific pools.
View Supply Forecast	Click this link to view the summarized information for a supply forecast.
	This icon appears once you select the Select check box for a resource pool and click the Add To Supply Forecast button to add the pool to the supply forecast.

Adding Pools to Forecasts

Access the Search for Pools page.

Select	Once you enter criteria and can view results from information you enter in the Search for Pools group box, select the check boxes for the pools you want to add to the forecast.
Add To Supply Forecast	Click this button to add the pools to the forecast. When you click this button, the Selected Pool icon appears next to the pool name. Click the Return to Select Pools link.

Reviewing Supply Forecasts

Access the Supply Forecast Summary page.

Description	Enter a description for this supply forecast.
Pool/Role	Displays the pool name and associated roles for the pool. Click a pool link in this column to view all the calculated capacity in detail for that role within the specific pool. You can remove an entire pool from the supply forecast by selecting the adjacent check box and clicking the Remove From Forecast button.
Total Capacity(Hours) or **Total Capacity(Days)**	Depending on your installation choice, this is the total calculated resource capacity in the pool for the date range specified for the supply forecast displays in hours or days. The data is summarized first by pool and then by role.
Full Time Resource	Displays the total number of full-time resources in the pool for the date range specified for the forecast. The common denominator for the calculation is the number of months included in the forecast.
Total	Displays the totals of the Total Capacity and Full Time Resource value. Click this link to view supply details for all the pools in the supply forecast.
Add New Supply	Click this button to select a date range within the forecast periods, pool, role, personnel status, and region, as well as an amount of capacity that you want to add to the supply forecast capacity.
Modify Region Utilization	Click this button to adjust the region utilization percentage for the current supply forecast.

Remove From Forecast Click this button to remove selected Pool data from the forecast.

Continue Selecting Pools Click this link to refine the pool selection for this forecast.

Supply Analysis Click this link to view and analyze supply forecast data by the four supply categories with monthly views.

Supply Summary Charts Click this link to view charts based on the supply categories.

Forecast Modification History Click this link to view each modification to the actual supply in the forecast.

Viewing Supply Forecast Details

Access the Supply Forecast Detail page.

Description Enter a description for this supply forecast.

If this icon displays in a Supply Details row, it indicates that the row was added to the forecast by using the Add New Supply page.

Click this icon to enter comments about the supply row. Two different icons can display: if the icon contains lines, there are comments entered for that row.

Supply Details

Role, Pool,Region, and **Personnel Status** These are the supply categories of the displaying resource capacity. Click a link in the Role column to modify the actual supply shown in that row.

Total Capacity (Hours) Displays the resource capacity for the row. The value is based on the unit of measure selected during installation.

Note. Depending on your installation options selection, the capacity will display in either days or hours.

Full Time Resource Displays the calculation of full-time resources for each row. The system calculates full-time resources based on the start and end dates on each row of the Supply Details group box. You can add a new row of supply that is within the forecast date range but that does not cover the entire range. It's important to note that the calculation is based on the date range specified in that row.

Start Date and **End Date** The system uses these dates to calculate capacity and full-time resources. All rows that are calculated from the resource pools must be the same date range as the forecast period. You can add new supply and specify date ranges within the forecast period. The capacity and full-time resources that the system calculates for the added rows are only based on the dates you entered on the Add New Supply page.

Click the Comments button to add additional comments about the supply row.

Modifying Supply Forecasts

Access the Modify Supply in Forecast page.

Supply Categories The supply categories for the selected row: Role, Region, Pool, and Personnel Status.

Note. You cannot change the supply categories of an existing row that was calculated from a resource pool.

Capacity Select capacity Days (or Hours; the field name depends on the unit of measure installation settings for capacity planning) or Resources. The values in the boxes prepopulate with what exists for that row. The values can be positive or negative numbers. Enter a value in one of the boxes. The system calculates the corresponding value (capacity in days or hours, or full-time resources) in the Supply Forecast Details group box after you click OK (it will not get calculated/displayed) in the Supply Modification page.)

Note. Changes made to either the Days or Resources fields will not be saved unless the respective option is selected.

Adding New Supply

Access the Add New Supply To Forecast page.

Note. You can enter the same supply categories as an existing row (even with the same date ranges).

Role SetID Enter a setID.

Role Enter any valid role. You can enter roles that are not yet in the forecast.

Pool Enter a pool. If you later remove a pool from the forecast, any new supply rows that you added for that pool will be removed from the forecast as well.

Region Code You can enter any valid region, not only what is in the forecast.

Personnel Status Select *Employee* or *Non-Employee.*

Capacity Select an option, and then enter the number of Hours (or days, depending on the installation settings) or the number of full-time Resources to add to the supply forecast.

Start Date and **End Date** The date range over which you want to add this supply in the model. The forecast start and end date values will appear by default. The dates must be within or equal to the supply forecast date ranges.

Comment Click this link to add comments about this new supply.

Modifying Region Utilization

Access the Modify Region Utilization page.

Note. The utilization values only apply to the particular forecast and do not override the *system* region utilization percent.

Description Enter a description of your modifications.

Region and **Utilization %** (utilization percent) This page displays all the regions that are set up in the system and the utilization percent.

Utilization % for this forecast

Enter a different utilization percent. The default value is equal to the Utilization % value. The system uses the value you enter to recalculate the supply in the current supply forecast.

Note. The value you enter here will remain with this forecast whenever you access it; all supply will be based on the value specified in this field.

Modifying Forecast History

Access the Supply Forecast Modification History page.

Action

- Add: Displays if you added a supply using the Add New Supply To Forecast page.
- Update: Displays if you added or removed an existing supply row that originally came from resource pools.
- Delete: Displays only if you selected a Supply Details check box and clicked the Remove from Forecast button.

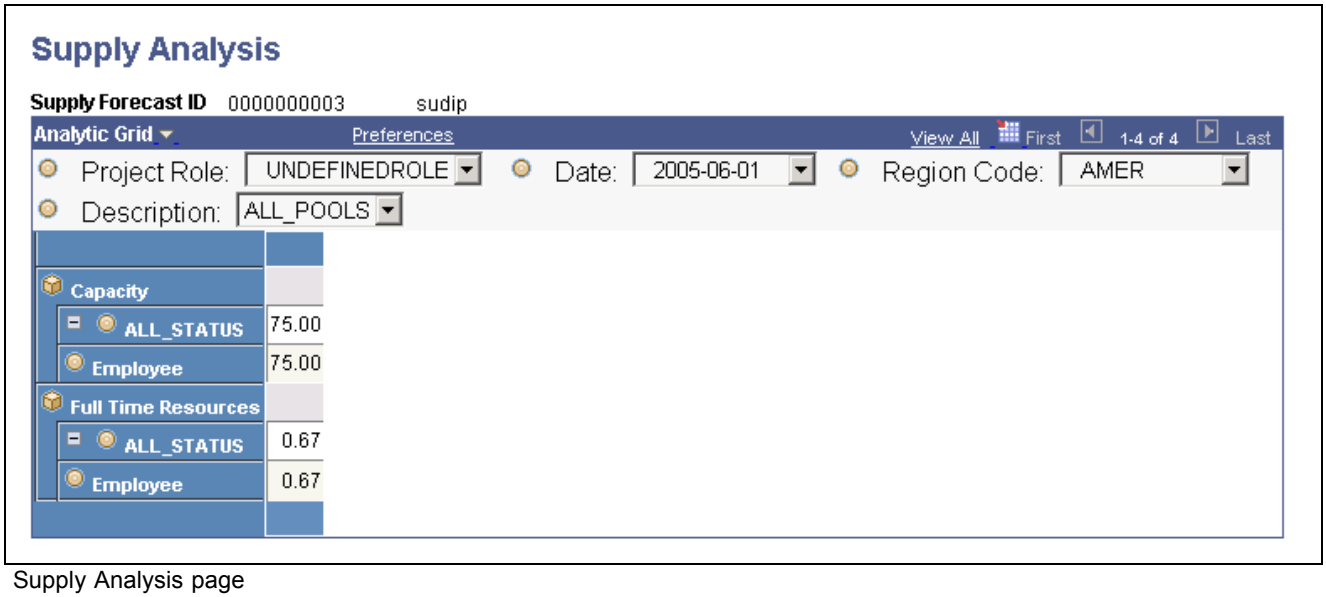
Capacity (Hours) and **Full Time Resource**

These two columns display the difference between the original supply details value and what you changed in the Add New Supply To Forecast or Supply Forecast Modification pages.

For example, let's say you update an existing row that was calculated based on the resource pools (and not by adding new supply row). You change the total capacity from 500 days to 250 days, and consequently the full-time resources change from 3 to 1.5. The Action becomes Update; the Capacity (Hours) value in the Supply Forecast Modification History is −250; the Full Time Resource value is −1.5.

Analyzing Supply

Access the Supply Analysis page.



Supply Analysis page

You can manipulate the data any way you like based on dimensions, including: Project Role, Pool, Region Code, and Personnel Status. For example, drag and drop the *ALL_ROLES* Project Role dimension to change the supply analysis view.

You can also see all months, rolled up all together or individually, that are part of the forecast.

You can apportion by supply categories to change the total Capacity and Full Time Resource dimension view.

See Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Analytic Calculation Engine, Understanding PeopleSoft Analytic Calculation Engine

Viewing Supply Forecast Charts

Access the View Supply Forecast Charts page.

Total CapacityFull Time Resources View the supply information by selecting Total Capacity (in whatever the capacity planning installation level unit of measure is: hours or days) or Full Time Resources.

Chart Type Select to view a bar or pie chart.

Refresh Click the refresh button after selecting different chart options to update the charts.

Copying Supply Forecasts

Access the Copy Forecast page.

Forecast Type Displays the forecast type selection that you make from the home page. If you select Copy Supply Forecast from the home page, the value is *Supply.* If you select Copy Demand Forecast from the home page, the value is *Demand.*

Note. You can create copies of existing supply forecasts. The newly created copy has the same date range as the original. The main purpose is to enable you to create multiple supply forecasts quickly for the same period to model multiple supply scenarios. For example, one forecast might be for increasing contractor supply, another for moving some supply offshore, and another for modeling zero supply change.

New Forecast ID Enter the ID for the new supply or demand forecast. It can be autonumbered or set manually. If it is set manually, you can enter up to 15 characters. If it is autonumbered, the ID will be 10 characters.

New Forecast Name Enter the name of the new forecast.

Copy from Forecast Select the forecast that you want to copy.

Copy Click this button to access the Supply Forecast page with the new Supply Forecast ID and Supply Forecast Name populated. The forecast will already be saved as a result of the Copy Forecast Application Engine process. (You do not have to click Save to save this new forecast; it will already be saved.)

Creating a Demand Forecast Model

This section provides an overview of the demand forecast model and discusses how to:

- Import external demand data.

  Note. Third-party data can be loaded into a staging table using the Excel-to-CI spreadsheet and viewed through this component (RS_EXT_DMD_SRCH) and validated so that it contains the proper information for enhanced analysis through the scenario component.

- Create a demand forecast.
- Search for demand data.
- Review summary demand data.
- Modify the demand forecast.
- View demand forecast charts.
- Analyze demand.
- Add demand.
- Add new roles.

Understanding the Demand Forecast Model

In an IT organization, there is the need for frequent projections of upcoming work to be done in an effort to improve a company's overall operational efficiency. IT executives need foreknowledge of the potential projects that are coming, and to compare the demand on their resources with projections of how much work they can manage given their existing resource constraints.

Whether the demand is as minor as a project to relocate a server (tactical project) or as significant as a system implementation spanning several years (strategic program), the supply of resources must remain adequate to meet the demand for work to be completed. Capacity planning enables management to build supply forecasts based on existing headcount, along with engaging in what-if scenarios so they can determine the effect of adding or cutting resources, obtaining contractor services, and so on. Similarly, the process of collating demand into a demand forecast is also needed.

IT organizations receive demand on their time through multiple methods, ranging from projects to external demand data sourced out of third-party systems. Before creating the demand forecast, the setup of import data and cleanup—or scrubbing—of that data must take place so that it can be used in the demand forecast.

The demand for resources is brought into the demand forecast from the following sources:

- Pending and active projects (from PeopleSoft Project Costing).
- External third-party systems using a generic Excel component interface upload process.

Once the preliminary demand forecast is populated with the raw data, you have the ability to add or delete demand from the list, categorize the entries in the list, and prioritize and rank the individual demand's importance for the organization. When you have verified and cleaned up the demand forecast, you can combine it with a similarly verified and scrubbed supply forecast into a consolidated supply-demand scenario, where you can perform further what-if scenarios to determine the optimal balance of available resources and pending work for the upcoming projected time period.

Note. The maximum range for demand forecasting is 24 months. Although demand itself can span longer (for example, a five-year implementation project), the forecast only concerns itself with a maximum of two years, and will only pull effort data within that two-year span.

You can upload data with the Excel-to-CI utility. The component interface used in this process is RS_EXT_DMD_CI. This component interface contains all the fields that are required in order to load demand data into the system.

You first load demand-related data into the Excel spreadsheet. After you run the Excel-to-CI utility to load the data, you use the Load External Demand page to clean up the data and add any additional information that was not specified in the Excel-to-CI process.

Demands loaded using the utility display in the Load External Demand page. The interface staging table RS_INTFC_DMD contains all the rows that you entered in the spreadsheet. All rows are validated against the prompts in the RS_EXT_SRCH_DMD, which is driven by business unit. Relevant rows that pass all validation tests are moved to the RS_EXT_SRCH_DMD for more cleanup. You can add any demand, delete any demand, or update existing demands.

The Demand Forecast component (RS_FR_DEMAND) is used to create, view, and modify demand forecasts.

Note. All data in supply forecasts, demand forecasts, and consolidated scenarios is “point-in-time.” This means that if additional resource pools or demand data changes or becomes available on the transactional side, it will not affect any existing forecasts or scenarios—unless you specifically choose to add them afterwards. In other words, forecasts are created based on supply and demand as of the date the forecast was created. If pools and capacity are added a week later, for example, that information will not appear in the supply forecast. You can manually add the supply but it does not automatically appear in the forecast.

Pages Used to Create a Demand Forecast

Page Name	Object Name	Navigation	Usage
Load External Demand	RS_EXT_DMD	Resource Management, Strategic Capacity Planning, Maintain External Demand Data	Import and clean up external demand data for use in demand forecasts.
Demand Forecast - Browse For Demand	RS_ADD_DMD	Resource Management, Strategic Capacity Planning, Demand Forecast Click the Continue Selecting Demand link.	Browse for demand from a predefined, filtered list to include in the demand forecast.
Search	RS_SEARCH_DMD	Click the Search for Demand link on the Demand Forecast - Browse for Demand page.	Search for demand using a set of multiple search criteria to include in the demand forecast.
Demand Forecast Summary	RS_DMD_SUMMARY	Resource Management, Strategic Capacity Planning, Demand Forecast	View total time needed (in hours or days) and full-time resource count by application area. This page displays the total time required (in hours or days, with conversion to full-time resource count) by application area only for the selected forecast ID.
Demand Forecast Details	RS_DMD_DETAIL	Resource Management, Strategic Capacity Planning, Demand Forecast, Demand Forecast Details	Build and modify demand forecasts.
Demand Details	RS_DMD_ROLE	Click a link in the Demand column on the Demand Forecast Details page.	View details by role and other demand data.
Demand Summary Charts	RS_DMD_CHARTS	Click the Demand Summary Charts link on the Demand Forecast Summary page.	View graphical summarized capacity information by demand category.
Demand Analysis	RS_DMD_ACE_PAGE	Click the Demand Analysis link on the Demand Forecast Summary page.	Dissect demand forecast data by supply categories by month.
Demand Forecast - Demand Details	RS_DMD_ROLE	Click the Add New Demand button on the Demand Forecast Details page.	Add new demand to the forecast.
Add New Role	RS_ADD_NEWROLE_DMD	Click the Add New Role button on the Demand Forecast - Demand Details page.	For the demand, add, modify, or delete roles, and change the level of effort needed for each role.

Importing External Demand Data

Access the Load External Demand page.

Sequence Number Enter a unique number in the Microsoft Excel spreadsheet. Each batch sequence number is uniquely identified by a load description for every upload process.

Load Description Enter a unique batch load description. You can vary the name of each run to distinguish the data during the upload process.

Business Unit Enter a business unit to map external data to either through manual entry in the spreadsheet or at a later point in the during data scrubbing to drive setID prompting.

Demand ID Enter an ID, which the system stores in a staging table (RS_INTFC_DMD). The system assigns items demand IDs during the load process.

Demand Description Enter any text to identify the demand data row.

Role SetID Enter the setID for the resource role requested by the demand.

Project Role Enter the role requested by the demand.

Program Enter a higher level categorization of Projects (this is an existing PeopleSoft Program management field). This field is optional.

Effort Enter the estimated length of time needed for this demand row for this role.

UOM (unit of measure) Specify corresponding effort capacity in *Days* or *Hours.*

Application Area Enter the group to which the demand belongs, such as *IT, Marketing,* and so on. We strongly recommend that you populate this field in order to view the data in summarized format in the demand forecast.

Application Enter an application to describe the system or application to which the demand applies, such as *Program Management, Project Costing,* and so on.

Release Assign a release to demand lines to account for periodic releases.

Category Enter a category to categorize the demand, such as *Operational* or *Strategic.*

Requester Enter the original requester of the project request.

Request Date Enter the date the project request was first submitted.

Status Indicates whether a project is already active and in operation, as opposed to being in the proposal state. This helps you to determine whether projects currently running need to be cancelled.

Values are:

- *In Progress:* Projects in active processing status.
- *Pending:* Projects in pending processing status.

Message Displays a descriptive message about the data row's status after the load process.

Add Demand Click this button to add a row in the Demand Data Cleanup group box.

You can enter any demand of your choice. The Demand ID is generated when a new row is added in the grid.

Validate Demand Click this button to validate the demand data for business unit, required key fields, and translate values.

Load Demand Click this button to retrieve all the rows from the RS_INTFC_DMD table. The process populates the RS_DMD_CACH table with all the demand data in monthly buckets and deletes the loaded rows from the interface grid in the page.

Note. When entering data in the RS_LOAD_EXT_DMD component interface, it is important to ensure that the LINE_NBR field is not selected for input because it is an autogenerated field; do not enter any value in it.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Component Interfaces, Using the Excel to Component Interface Utility

Creating a Demand Forecast

Access the Demand Forecast - Browse for Demand page.

Demand

View Demand By Filter your demand by selecting one of these options:

- *Application Area:* Groups the demand by application area. This is a field on the Project Definitions - General Information page.
- *Program:* Groups the demand by program.
- *Release:* Groups the demand by release.

After you select a filter to view the demand, click the View button to display the demand. Then, once you are satisfied with the demand, click the Add to Demand Forecast button and the system will add the demand.

You can click a link in this column to browse further down into the individual demand and select projects individually to add to the forecast.

Select the check box for each row of demand that you want to add to the forecast.

Note. The demand forecast categorizes demand by application area, application, release, and program, although none of those fields are required for projects. Therefore, if you do not specify values in these fields, you cannot comprehensively use the Demand Forecast - Browse for Demand page because projects without those fields specified will not be visible. The only way you would be able to select projects to add to a demand forecast is to access the Search page (RS_SRCH_DMD) where *all* projects within the demand forecast date range are accessible—whether or not application area, application, release, or program are specified.

Click this icon to drill further down to the individual demand level and select projects individually to add to the forecast. For example, click it to drill down from Application Area to Application and then to individual demand.

Add to Demand Forecast Click this button to add the selected demand to the demand forecast.

View Demand Forecast Click to access the Demand Forecast Details page where you can change the demand details for the specified Demand Forecast ID.

Search for Demand Click this link if the Demand group box does not provide the appropriate information and you need to perform a more detailed search.

Demand Forecast

Forecast ID The demand forecast ID.

Name The name of the demand forecast.

Start Date and **End Date** The start and end date range of the forecast in MM/YYYY format.

View Demand Forecast Click this link to view forecast details, and change demand details for this demand forecast ID.

Searching for Specific Demand Data

Access the Search page.

This page contains the results of the initial basic search. You can further modify the search parameters, and can search as many times as necessary to find the appropriate demand data.

The fields on this page are the same as the fields on the Demand Forecast Details page, also discussed in this chapter.

Reviewing Summary Demand Data

Access the Demand Forecast Summary page.

Continue Selecting Demand Click this link to add additional demand data to the forecast.

Demand Analysis Click this link to perform further analysis. Perform these actions for all months (month by month), and one month at a time for each month in the forecast.

Demand Summary Charts Click to access the Demand Summary Charts page where you can view graphical representations of the selected demand data.

Demand Summary

View the data sorted by Application Area: the Total Effort required (in hours or days), with conversion to Full Time Resource count.

Total effort is based on the project calendar set for the demand (or for the external demand, using the default project calendar for that business unit), and is calculated using the number of days specified for each role on the project in the Assignment Schedule group box on the Resource Details page in PeopleSoft Program Management, less weekends and holidays. Full-time resources are calculated by dividing the effort by the number of days per month for a full-time resource (as defined during the capacity planning setup in Resource Management).

Note. The demand forecast first categorizes demand by the Application Area field. On this page, all demand is summarized at the application area. Any demand that does not have application area specified, will not be part of the demand summary; it will not display nor be part of the total full-time resource (FTR) and capacity.

Demand that does *not* have application area specified, however, will be accessible on the Demand Forecast Details page.

Click the Save Forecast button to save the forecast, and to populate the lower half of the page with values in these fields:

- Created By
- Updated By
- Created On
- Updated On

Modifying the Demand Forecast

Access the Demand Forecast Details page.

Note. Many of the fields on this page are the same as fields on the Load External Demand page.

Rank This is a sequencing field in which you can enter a number to rank demand in order of importance. Rank for each demand must be unique across the demand forecast.

Priority Assign a value of *Critical, High, Medium,* or *Low* to demand rows for informational purposes only. No processing is done on these fields.

Demand This is a combined ID field that displays values from Project ID or External Demand ID, along with the demand description.

Click a link in the Demand column on the Demand Forecast Details page to view details of that particular demand row, and modify demand information for the forecast.

Note. Changing the value of any of these demand details fields will not change the values set on the actual project in the system. The values will only be used in this forecast.

Schedule This field is a concatenation of the start and end dates, release, and status. For example:

09/20/2005 - 11/01/2005

Release: 8.9

Pending

Effort and Category The estimated length of time needed for this demand row for this role.

This is a concatenation of effort, unit of measure, and category. Category is specified on the Project General Information page.

Application Area, Application	Displays the group, and system or application to which the demand applies, such as *ESA, IT, Marketing, Program Management,* and so on. Application and application area are specified on the Project General Information page.
Demand	This field is a concatenation of the demand ID and the demand description. For example: *M000397* *Bulk Mailer Upgrade*
Business Unit	This is the Project Costing demand business unit.
Program	This is a Program Management field that reflects a higher-level categorization of projects and project requests.
Project Type	This field is specified on the Project General Information page.
Demand Source	Indicates from where the demand data came.
Requested by	If the project came from a project request, this field will be populated with the requestor of the project request and the date the request was originally created. If the project was not created from a project request, it will be populated with the user ID that created the project in the system.
Continue Selecting Demand	Click this link to add further demand data to the forecast.
Demand Summary Charts	Click this link to view graphical representations of the selected demand data.
Add New Demand	Click this button to add new demand.
Remove From Forecast	Click this button to delete selected demand from the forecast. This deletes the rows from the Demand Detail table and Demand Forecast Cache table for the Demand ID specified.

Viewing Demand Forecast Charts

Access the Demand Summary Charts page.

This page and its fields are similar to the page for supply forecasts.

Pie charts will feature metrics for each pie section, including total effort (in hours or days), full-time resources conversion, and a percent of total field. For example, a potential pie section label would be

```
950/45  27%
```

This label indicates 950 days, 45 full-time resources, and 27 percent of the total pie. (This does not apply for a bar chart view.)

Four pie or bar charts display:

- Demand by Application Area: This view lists the total demand for each application area (not application) and displays an associated legend with such labels as IT, Marketing, Facilities, Quality Assurance, and so on.
- Demand by Role: This view lists the total demand for each role and displays an associated legend with such labels as DBA, Developer, FA, and so on.
- Demand by Release: This view lists the total demand for each release and displays an associated legend with such labels as 5, 3.1, 1.0, and so on.

- Demand by Priority: This view lists the total demand for each priority and displays an associated legend with such labels as Critical, High, Low, and so on.

See Also

Viewing Supply Forecast Charts

Analyzing Demand

Access the Demand Analysis page.

This page and its fields are similar to the page for supply forecasts, except that you can manipulate the data by different categories:

- Total Effort
- Full Time Resources
- Application
- Application Area
- Release
- Program

See Also

Chapter 29, “Conducting Capacity Planning,” Analyzing Supply, page 404

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Analytic Calculation Engine, Creating Analytic Grids

Adding Demand

Access the Demand Forecast - Demand Details page.

Enter demand detail information in the Demand General Information group box, and then click the Add New Role button to choose setID and role information to add to the Demand By Role group box. Click the OK button for the system to add the information to the Demand group box on the Demand Forecast Details page.

This inserts a row into the Demand Detail table for the Demand ID specified. Any demand you enter here is automatically split evenly into the months within the Start Date and End Date range you specified in the demand details.

See Also

Chapter 29, “Conducting Capacity Planning,” Importing External Demand Data, page 409

Adding New Roles

Access the Add New Role page.

Role SetID, Project Role, and **Effort (Hours)**

Enter the role information for the demand.

Note. The unit of measure for Effort will be in days or hours depending on the installation options you selected.

Conducting Consolidated Scenario Analysis

This section provides an overview of consolidated scenario analysis and discusses how to:

- Create and review consolidated scenarios.
- Adjust consolidated scenarios.
- Adjust forecasted or allocated demand.
- Adjust forecasted supply.
- Approve consolidated scenarios.
- Analyze consolidated scenarios.

Understanding Consolidated Scenario Analysis

The consolidated scenario analysis is the final of three primary components in the Capacity Planning process flow. When you begin the Capacity Planning process, you can choose to either build the supply or demand forecasts (either can be completed before the other). Supply and demand forecasts are typically built by different users, but both forecasts need to be completed and available prior to performing the consolidated scenario analysis.

The currency code you select drives how the consolidated scenario displays estimated cost information. For example, if you select USD and the role rates by region are in another currency, the system converts the currency to USD during its calculation of the blended rate so that estimated costs for supply and demand can be shown in USD.

Note. If the same forecast has been included in more than one scenario prior to either forecast being approved, as soon as one of the scenarios is approved, the other can no longer be approved and will have a status of 'obsolete', because the forecasts are also locked.

With consolidated scenario analysis, you can:

- View graphs of the combined supply-demand forecasts.
- Project the amount of demand to which your organization can realistically commit based on the supply constraints.
- Perform further modification of supply and demand forecasts to model what-if scenarios.
- Approve a consolidated scenario and track assumptions made that are integral to the scenario's approval.

Use the Combined Scenario component (RS_SCENARIO) to conduct consolidated scenario analysis.

Pages Used to Conduct Consolidated Scenario Analysis

Page Name	Object Name	Navigation	Usage
Consolidated Scenario Analysis - Scenario Summary	RS_SCENARIO_SUMM	Resource Management, Strategic Capacity Planning, Consolidated Scenario Analysis	View supply summaries and supply and demand metrics with graphical comparison. **Note.** This page is for users that have permissions enabling them to create, save, and approve consolidated scenarios.
Consolidated Scenario Analysis - Scenario Summary unapprove	RS_SNR_UNAPPROVE	Resource Management, Strategic Capacity Planning, Consolidated Scenario Analysis, Scenario Summary	Users that have appropriate permission lists can use this page to unapprove a scenario. **Note.** This page is for users that have permissions enabling them to create, save, and approve consolidated scenarios, and to unapprove them. Permission list EPRS9500 enables approvals and unapprovals; EPRS9400 enables approvals but does *not* enable unapprovals.
Consolidated Scenario Analysis - Commitment Line	RS_SCENARIO_DTL	Resource Management, Strategic Capacity Planning, Consolidated Scenario Analysis, Commitment Line	Commit to or defer on the demand for a particular scenario.
Consolidated Scenario Analysis - Demand Details	RS_SNR_DEMAND_DTL	Click the Demand Name description links from the Consolidated Scenario Analysis - Commitment Line page.	Adjust forecasted and allocated demand as well as modify project header information.
Consolidated Scenario Analysis - Assumptions	RS_SCENARIO_ASSUMP	Click the Approve button on either the Consolidated Scenario Analysis - Commitment Line page or Consolidated Scenario Analysis - Scenario Summary page.	Upon approval of the scenario, enter any assumptions that assisted in approving the scenario. **Note.** The scenario Status must be *Pending* in order for this button to be visible.
Add New Role	RS_ADD_ROLE_DMD	Click the Add New Role button on the Consolidated Scenario Analysis - Demand Details page.	Enter the role setID, role, forecasted demand, and allocated demand information to create a new role for the demand.

Page Name	Object Name	Navigation	Usage
Consolidated Scenario Analysis - Supply Details	RS_SNR_SUPPLY	Click the Modify Supply button on the Consolidated Scenario Analysis - Scenario Summary page.	Change virtually all of the same data that can be changed in the supply forecast. This page also provides additional information about which roles may be overallocated.
Consolidated Scenario Analysis - Edit Supply By Region	RS_SNR_EDIT_REGION	Click a link in the Role column on the Consolidated Scenario Analysis - Supply Details page.	Adjust forecasted supply by region.
Consolidated Scenario Analysis	RS_CON_ACE_PAGE	Click the Scenario Analysis link on the Consolidated Scenario Analysis - Scenario Summary page.	Dissect and scrutinize consolidated scenario data by supply categories by month.

Creating and Reviewing Consolidated Scenarios

Access the Consolidated Scenario Analysis - Scenario Summary page.

Scenario ID This number is either generated by the system or is the unique ID you provided.

Scenario Name The name of the scenario.

Scenario Status The possible values are *Pending, Approved,* or *Obsolete.* A scenario starts in a pending status until it is approved. It can become obsolete if another scenario using either the same supply or demand forecast has already been approved.

Start Date and End Date The start and end dates as on the supply and demand forecasts you selected for this scenario.

Supply Forecast and and **Demand Forecast** The supply forecast and demand forecast for the consolidated scenario analysis. The date ranges for the supply and demand forecasts must be an exact match to be eligible for analysis. The initial supply and demand forecast prompts only return supply or demand forecasts that have not yet been approved through another scenario, because approval will lock the scenario *and* the forecasts.

Supply and Demand Comparison

The supply and demand metrics compare total forecasted supply against total forecasted demand for the selected forecasts. The comparison displays effort (in hours or days depending on installation options), along with FTR (full-time resources) conversion and estimated costs.

Estimated Cost

- For *Forecasted Supply,* the system calculates the cost of each resource using the rate by role by region, including currency conversion.
- For *Forecasted Demand,* it is possible to have demand that calls for specific roles but do not specify region. For each row of the supply forecast, multiply the role rate by region by the capacity for that row, then sum all the rows together and divide it by the total capacity. This gives the blended rate. You then multiply the blended rate by the total demand hours to get the forecast demand estimated cost:`blended rate x total demand effort.`

Days or **Hours** The total number of days (or hours depending on setup) available in the selected supply and demand forecasts (includes all roles in the forecast).

Full Time Resources Displays the number of full-time resources needed in this consolidated scenario, by category.

Note. This value takes into account your setting for the number of days per month and the total number of days in one month required to convert to one full-time resource. The system calculates full-time resources for demand using the region utilization percentage that is based on the default capacity planning Region Code specified on the Installation Options - Resource Management page. Full-time resources for supply are based on the full-time resources calculated in the supply forecast.

See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Setting Up Resource Management Installation Options.

Supply Summary

Supply Status There are five possible statuses, indicated visually by the colored bar with the black triangular pointer:

- Extreme Supply Capacity Shortage (pointer at far left of the spectrum): Indicates that forecasted supply is less than allocated demand and the difference between the two is ≤ −25%.
- Slight Supply Capacity Shortage (middle left of the spectrum): Indicates that forecasted supply is less than allocated demand and the difference is: −10% ≥ difference > −25%.
- Reasonable Supply and Demand Match (middle of the spectrum): Indicates that forecasted supply is either less than or greater than allocated demand and the difference is: −10% < Difference < +10%.
- Slight Supply Capacity Surplus (middle right): Indicates that forecasted supply is greater than allocated demand and the difference is: +10% ≤difference < +25%.
- Extreme Supply Capacity Surplus (far right): Indicates that forecasted supply is greater than allocated demand and the difference is: > +25%.

Forecasted Supply (Hours) Displays the total capacity as created by the selected supply forecast for all roles.

Allocated Demand (Hours) Displays the total effort committed to, summed from the Demand - Summary rows on the Commitment Line page.

Note. Upon entry into a new scenario, the system sets all demand lines to *Commit* by default, essentially making it an initial demand total. You can change the *Commit* to *Defer* on each demand line as needed, thus reducing the total demand.

Overallocated Roles Displays the number of roles that have dropped below available supply. This is not a count of individuals but a sum of individuals based on the available roles in the supply forecast.

Modify Supply Click this button to modify the supply forecast.

Rate Options

Expand this group box to view the Blended Rate as calculated for the Supply and Demand Comparison fields. You can use the fields or Override the values. Any changes you make are valid only for the particular scenario.

The system uses the blended rate to calculate the estimated cost for the forecasted supply and demand. The blended rate is initially calculated by taking the average rate of every role in the forecasted supply across regions.

Note. The blended rate used here is for all roles and all regions; there is no blended rate by role. Providing this capability at a high level allows for what-if scenario planning.

Recalculate Click this button to recalculate the totals.

Demand for all Projects

The charting functionality displayed in the bar graph shows three dimensions displayed by month:

- Forecasted Demand
- Allocated Demand
- Forecasted Supply

The information displayed here is an aggregate total for the *entire* supply and demand forecast, not down to the role or project level. The y-axis shows the effort level (in days or hours), and the x-axis shows the months.

Adjusting Consolidated Scenarios

Access the Consolidated Scenario Analysis - Commitment Line page.

The Alert icon appears in the ALERT column when the variance is a negative value (when allocated demand is less than forecasted demand).

Commitment Line

- *Commit:* Select to commit to the demand.
- *Defer:* Select to defer the demand.

Note. When you create a scenario, the system automatically commits to all demand entries in the forecast and modifies Allocated Demand to match Forecasted Demand. However, when you manually commit to a demand row by selecting *Commit,* the Allocated Demand value for that row does not change automatically.

If the value in this column is *Defer* and you change it to *Commit,* the system will not override the value in the Allocated Demand column with the Forecasted Demand value because the system does not assume that you are committing to all the forecasted demand—only what you manually enter in the Allocated Demand column.

Rank The sequential ranking assigned in the demand forecast. You can modify it here, but two demand rows cannot have the same ranking. You do not have to rank all demand; there can be gaps between rankings, such as entering *1, 2,* and *4,* but not *3.*

Priority Select *Critical, High, Medium,* or *Low.* Priority is originally assigned in the demand forecast, but you can modify it here.

Demand Name The description of the project or external demand. Click a link in this column to modify the allocated and forecasted demand at the role and month level.

Forecasted Demand The total effort (in hours or days) for the project in the demand forecast. This total is for the date range specified in the scenario forecasts only.

Allocated Demand The total of the demanded effort that is being set aside for this project. Initially, when the system commits by default to all demand, this field is automatically set to match the values in the respective Forecasted Demand. You can adjust and reduce the demand if, for example, you don't think it's necessary to provide resources to match the full demand request. Click a link in the Demand Name column to access the demand details to make adjustments by role.

Variance Displays the difference of the Allocated Demand value less the Forecasted Demand value. The initial value is *0* since the system automatically commits to all demand. As you adjust forecasted or allocated demand, the system recalculates the value. If there is a negative variance, fewer resources are allocated than were originally requested. Any negative value in this column causes the ALERT icon to appear.

Commit All and **Defer All** Click the link to commit to all demands in the scenario or to defer all Demand - Summary lines at once.

Save Click this button to save the scenario data. Doing so causes the system to write any applicable changes to the original supply and demand forecasts.

Approve Click this button to approve the scenario. The Scenario Status value changes to *Approved* and thus cannot be edited. In addition, the associated supply and demand forecasts are also locked and can no longer be modified.

Note. When you approve a scenario, you must also log assumptions about it.

Scenario Analysis Click this link to view the summary data from the Commitment Line page in multiple ways. You can see all months or individual months for each month in the scenario. You can view the data by alert, allocated demand, commitment line, forecasted demand, priority, rank, and variance.

Scenario Assumptions Click to enter additional information about the scenario. The system takes you to a page containing a long edit box for each assumption, who created it, and who owns it. The owner information is not used for workflow.

Capacity Planning Home Click this link to view your last five accessed scenarios and supply and demand forecasts, and to copy them.

Adjusting Forecasted or Allocated Demand

Access the Consolidated Scenario Analysis - Demand Details page.

Demand General Information

In this group box, you can view the additional information about the forecasted or allocated demand and modify much of the project header information to adjust forecasted or allocated demand.

Note. Modifying this information does not update the actual project.

Demand By Role

The columns that appear in this group box vary depending on the View By selection. You can select *<Month/Year>, All Months,* or Summarized Demand.

ALERT An icon appears in this column when the variance is negative.

Forecasted Demand and **Allocated Demand** For each month in the scenario, the total effort forecasted and allocated for the current month by role appears.

If you modify the values for forecasted demand, it changes the values initially forecasted in the associated demand forecast. Since these rows display the effort by role and month, any modification you make changes the demand forecast data at the lowest level of the forecast. If your View By selection is *Summarized Demand,* you can modify the values and the changes you make will be spread across all months of the demand.

If you modify the numbers for allocated demand, it changes the values directly in the scenario on the Commitment Line page. The values for allocated demand are part of the scenario only and are not sourced from the initial demand forecast. Upon initial creation of the scenario, the allocated demand is matched to the forecasted demand when the system autocommits to all demand in the scenario.

Variance Allocated demand minus forecasted demand.

View project details Click this link to access the actual project setup pages (if this is a project). If it is an external demand, this link is not available.

Add New Role Click this button to add a new role for situations where there is no resource for the role already listed. Any new roles added at the summarized level are split out evenly across the months in the scenario for that particular role and for the unassigned resource pool, and a blank personnel status. You can drill down, however, and specify the month to add this data more accurately. If you want to delete a role, enter *0.00* in the fields for the row.

Note. Because region is setID specific, if you add a role in either demand or supply (in consolidated scenario), the system uses the default region you specified in the Capacity Planning Setup group box on the Installation Options - Resource Management page. In addition, when you create regions, it is recommended to set them up under one setID unless your resources are spread amongst multiple setIDs.

Click the OK button to return to the Commitment Line page with the summary data in the grid recalculated with the new information.

Adjusting Forecasted Supply

Access the Consolidated Scenario Analysis - Supply Details page.

Note. You can modify the overall forecasted supply level for the role without having to go down to the region level to adjust supply. Any change to the supply is automatically allocated to the region defined in the Default Capacity Planning Region group box on the Installation Options - Resource Management page and to the *Unassigned* resource pool. You can also adjust supply for each role at the lower region level by clicking the link in the Role column.

Role Click a link in this column to adjust forecasted supply by region.

View By When you first access this page, the Supply group box displays the summary of all months in the scenario date range. You can change the view by selecting one of the following values and clicking the Go button:

- *<Month/Year>:* Shows the data only from that month. The values are dynamically generated based on the start and end dates of the scenario.
- *All Months:* Shows data from all months in the scenario with each month shown separately.
- *Summarized Supply:* Shows summarized data.

 ALERT An icon appears in this column only when the Variance column value is negative. The icon will be visible regardless of the View By selection; however, if you select a specific individual month, the system verifies whether that particular month has a negative variance. If a role is overallocated *overall* but is not overallocated in the specific month being viewed, the ALERT icon will not appear.

Forecasted Supply The total capacity forecasted for the current month by role (all regions are summed). You can change this value here.

Because changing data on this page does not specify which region for which capacity is being changed, the system places any additional capacity into the default region specified on the Installation Options - Resource Management page. The system also places negative changes—changes in which you decrease capacity—into the default region with a negative number, such as −100 if you've changed a value from 500 to 400. Any *Summarized Supply* data changes at this level mean the system will split the data amongst all the months in the scenario date range in the default region (the region set up at installation). For *All Months* or for individual months (*<Month/Year>*) data changes, the system will change the data only in the specific month being modified in the default region.

Approving Consolidated Scenarios

Access the Consolidated Scenario Analysis - Scenario Summary page, the Consolidated Scenario Analysis - Scenario Summary unapprove page, or the Consolidated Scenario Analysis - Commitment Line page.

Click the Approve button to approve the scenario.

The Consolidated Scenario Analysis - Assumptions page appears so that you can enter any assumptions that assisted in approving the scenario.

Users with security to unapprove scenarios will see the Unapprove button on the Consolidated Scenario Analysis - Scenario Summary unapprove page. Click this button to make the consolidated forecast, and the associated supply and demand forecasts editable again.

Note. Approving a consolidated scenario does not trigger any workflow, nor does it affect the projects or resources in the system. Approving a consolidated scenario simply "locks" the supply and demand forecasts tied to the consolidated scenario so that any decisions made can be shared among appropriate individuals who can then execute on the agreed-to supply and demand plans presented in the forecasts.

Analyzing Consolidated Scenarios

Access the Consolidated Scenario Analysis page.

This page and its fields are similar to the page for supply forecasts and the page for demand forecasts. Scenario analysis enables you to analyze the data by the following attributes: Alert, Allocated Demand, Commitment Line, Forecasted Demand, Priority, Rank, and Variance.

See Also

Chapter 29, "Conducting Capacity Planning," Analyzing Demand, page 414

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Analytic Calculation Engine, Creating Analytic Grids

CHAPTER 30

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 home page.

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

Resource Management provides *reports* and *interactive reports* that are specifically designed to assist you in analyzing and managing 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.

  PeopleSoft Process Scheduler 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.

  Resource Management interactive reports provide information that is immediately visible on the application page—without the need for sending a process request to the 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	Establish parameters for the Scheduled Utilization interactive report that you generate from the Resource Management Interactive Reports folder. This 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.
Unassigned Resources	RS_2030BENCH_PAR	Resource Management, Interactive Reports, Unassigned Resources	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 human resource (HR) business units that share the Organizational Unit tree.This report lists resources who do not meet the threshold for determining that a worker is fully assigned.

Page Name	Object Name	Navigation	Usage
Assignments Ending	RS_2040WRKRCOM_PAR	Resource Management, Interactive Reports, Assignments Ending	Establish parameters for the Assignments Ending interactive report that you generate from the Resource Management Interactive Reports folder. Use this 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.
Most Requested Competencies & Accomplishments	RS_2100COMP_RPT	Resource Management, Interactive Reports, Most Requested Competencies	Establish parameters for the Most Requested Competencies & Accomplishments interactive report that you generate from the Resource Management Interactive Reports folder.
Chart Resource Schedules	RS_2045WRKRSCH_PAR	Resource Management, Interactive Reports, Chart Resource Schedules	Establish parameters for the Chart Resource Schedules interactive report that you generate from the Resource Management Interactive Reports folder. The Chart Resource Schedules interactive report displays a chart of resource schedules to help you quickly identify scheduled and available time. Select the organization, start date, period of time, number of resources, and tasks that appear in the chart.

Page Name	Object Name	Navigation	Usage
Average Staffing Time	RS_2090AVST_PAR	Resource Management, Interactive Reports, Average Staffing Time	Establish parameters for the Average Staffing Time interactive report that you generate from the Resource Management Interactive Reports folder. 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.
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	RS_2015ASSGNLS_RPT	Resource Management, Reports, Assignments Listing	Establish parameters for the Assignments Listing SQL report that you generate from the Resource Management Reports folder. Use the Assignments Listing SQL report to review a list of all resources currently on assignment. 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.

Page Name	Object Name	Navigation	Usage
Service Order Listing Report	RS_2000SOLIST_PAR	Resource Management, Reports, Service Order Listing	Establish parameters for the Service Order Listing SQL report that you generate from the Resource Management Reports folder. Review to whom service orders have been assigned for fulfillment and the state of your customer's projects, and track 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.

Setting Scheduled Utilization Parameters

Access the Scheduled Utilization page.

Select an Organization This group box displays the Organizational Unit tree that you select in the Tree Name field. When you select an organizational unit to evaluate, the selection appears in the Selected Organization field.

Expand the nodes 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 HR business unit that is associated with the Organizational Unit tree from which you will select organizational units to include in the interactive report. The 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.

Selected Tasks Enter the Task Category to include in the definition of utilized time.

Advanced Parameters Click this link to view and add business unit and tree name information. A Basic Parameters link displays here after you click the Advanced Parameters link.

See Also

Chapter 26, "Managing Resource Utilization," Reviewing Utilization Charts, page 357

Setting Unassigned Resources Parameters

Access the Unassigned Resources page.

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.

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.

See Also

Chapter 26, "Managing Resource Utilization," Reviewing Utilization Charts, page 357

Setting Assignments Ending Parameters

Access the Assignments Ending page.

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 and Accomplishments Parameters

Access the Most Requested Competencies & Accomplishments page.

The pie charts for this report 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 page.

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.

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 26, “Managing Resource Utilization,” Reviewing Utilization Charts, page 357

Setting Average Staffing Time Parameters

Access the Average Staffing Time 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.

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 18, "Enabling Resource Optimization," Defining, Registering, and Creating Solution Sets, page 206.

Setting Assignments Listing Report Parameters

Access the Assignments Listing page.

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 page.

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 this check box 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.

Priority Code Enter the priority codes to include on the report.

APPENDIX A

Delivered Workflows for PeopleSoft Resource Management

This appendix discusses delivered workflows for Resource Management.

See Also

Chapter 5, "Defining PeopleSoft Resource Management Business Units," Specifying Resource Management Business Unit Options, page 52

Chapter 27, "Processing Worklist Items," page 367

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up Resource Management Installation Options

PeopleTools PeopleBook: PeopleSoft Workflow

PeopleTools PeopleBook: Using PeopleSoft Applications

Delivered Workflows for PeopleSoft Resource Management

This section discusses 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 20, "Maintaining Resource Schedules," page 233

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 *Assigned.* Modify an assignment date for an assignment that is in an *Assigned* status. Modify the assignment status of an existing assignment from any status to *Assigned.* 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 *Assigned* triggers a worklist item to the manager of the resource—either the resource's supervisor (as defined on the Job record) or the resource's pool manager, to approve the assignment. The pool manager is determined by first identifying to which pools a resource belongs (through the RS_POOL_MEMBER record), and then identifying the manager of those pools (through the RS_RES_POOL record). You define the manager of a given resource by selecting an option in the Resource Manager Options group box on the Resource Management Options page: Pool Manager or Supervisor. Saving a new assignment with a status of *Assigned* will also trigger workflow to the project manager for the project if you select the Project Manager Approval Required check box in the Assignment Approval Options group box on the Resource Management Options page. **Note.** If a resource belongs to different pools at different times, then the assignment dates determine which pool to use. Modifying a date for an assignment in an *Assigned* status triggers a worklist item to the resource's manager and project manager to approve the assignment date change. Modifying the status of an assignment from any status to *Assigned* triggers a worklist item to the resource's manager and project manager to approve the assignment status change. Modifying an assignment date or status triggers an email notification to the resource's 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's 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's manager to approve a new assignment if the resource's 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. This applies if you are sending workflow to the supervisor—and not the pool manager.

Workflow Objects

Business Process	Assignment Approval (RS_ASSGN_APPROVAL)
Activity	Assignment Approval (RS_ASSGN_APPROVAL)

See Also

Chapter 21, "Assigning Resources," page 245

Chapter 24, "Fulfilling Service Orders," page 309

Chapter 26, "Managing Resource Utilization," page 341

Chapter 28, "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 19, "Maintaining Resource Profiles," page 213

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 21, "Assigning Resources," page 245

Generic Resource Request

This section discusses workflow for generic resource requests.

Description

Event Description	The following event triggers generic resource request workflow: When a user selects*Requested* in the Resource Status field on the Resources page in the Projects Definition component of PeopleSoft Program Management and workflow has been enabled for approving generic resource requests.
Action Description	The business process and the activity are called RS_GRR_APPROVAL.
Notification Method	The Pool Manage receives an email and worklist item.

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 *Recommend* 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 23, "Requesting Resources Using Service Orders," page 287

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 *Assigned.* Modify a date for an assignment in an *Assigned* status. Modify the status of an existing assignment from any status to *Assigned.*
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 21, “Assigning Resources,” page 245

Chapter 24, “Fulfilling Service Orders,” page 309

Chapter 26, “Managing Resource Utilization,” page 341

Chapter 28, “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 23, "Requesting Resources Using Service Orders," page 287

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 28, "Using the Resource Self-Service Feature," page 373

APPENDIX B

Resource Management Web Libraries

This appendix provides an overview of web libraries and discusses Resource Management web libraries.

Understanding Web Libraries

A web library is a derived or work record whose name starts with WEBLIB_. PeopleSoft embeds all internet scripts (iScripts) in records of this type. An iScript is a specialized PeopleCode function that generates dynamic web content. Administrators must make sure that users have the proper access to web libraries. For example, the default navigation system for PeopleSoft Enterprise Pure Internet Architecture users is implemented by using a web library. If users do not have the proper authorization to the web library and its associated scripts, then they won't have proper access to the system. If users are not authorized to a particular web library or iScript, then they can't invoke it. After you add a web library, you set the access for each script function individually. Invoking an iScript requires the assembly of a URL. Developers assemble the URL by using PeopleCode.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleCode API Reference

Enterprise PeopleTools 8.45 PeopleBook: Security Administration

Enterprise PeopleTools 8.46 PeopleBook: Internet Technology

Resource Management Web Libraries

This table lists the web libraries that are used and delivered with Resource Management:

Web Library Name	Description
WEBLIB_RS	This handles Mass Pool import functionality, and contains iScripts for mass pool.
WEBLIB_RS_SCHD	This contains iScripts for and handles Calendar functionality requirements.
WEBLIB_IB	Generates PeopleSoft Integration Broker functions.
WEBLIB_MSGWSDL	This is the record behind the page for the enterprise integration point (EIP) Web Services Description Language (WSDL) generation.

Web Library Name	Description
WEBLIB_PORTAL	Contains the following six fields with FieldFormula iScript PeopleCode, each of which relate to a functional area of the portal: PORTAL_HOMEPAGE: Support for homepage runtime interaction, including the homepage version of the menu navigation. PORTAL_NAV: Main support routines for navigation. PORTAL_HEADER: Support for the header portion of the page and some generic routines. PORTAL_DYN_TEMP: Support for the dynamic template. PORTAL_PGLT_PREV: Support for the pagelet preview functionality.
WEBLIB_PT_NAV	Contains iScripts for the menu pagelet and left-hand navigation for transaction pages.
WEBLIB_RPT	Contains iScript for the Run report to window output option. Supports access to the new browser window.
WEBLIB_XMLLINK	Generates PeopleSoft Business Interlinks XML functions.

APPENDIX C

PeopleSoft Resource Management Reports

This appendix provides an overview of 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 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. See Chapter 26, "Managing Resource Utilization," Reviewing Utilization Charts, page 357.	Resource Management, Interactive Reports, 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. See Chapter 26, "Managing Resource Utilization," Reviewing Utilization Charts, page 357.	Resource Management, Interactive Reports, 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. See Chapter 26, "Managing Resource Utilization," Viewing Resources, page 347.	Resource Management, Interactive Reports, 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 26, "Managing Resource Utilization," Reviewing Utilization Charts, page 357.	Resource Management, Interactive Reports, 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 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 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. See Chapter 18, "Enabling Resource Optimization," Defining, Registering, and Creating Solution Sets, page 206.	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 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.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

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.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

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.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* 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.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
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.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
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 activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

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 process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

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.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

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.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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 *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

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.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

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 Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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-plus contract line A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.

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.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

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 cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

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.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

	See also *population* and *cohort*.
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 *Enterprise Incentive Management ledger.* 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.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
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.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

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.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit*. A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template*. In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process*. In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

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.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access*.

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

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.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations.

	You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for *key performance indicator.* 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 *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* 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 *rates*) 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.
LMS	Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
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 *1*—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.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

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 *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* 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.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

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 *compensation object.*

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.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

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 component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure 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.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

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.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

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.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

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 A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

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.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

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.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

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 *record input value-added tax flag.* 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 *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

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 *real-time event notification server* 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.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
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.
SCP SCBM XML message	Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
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.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

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 key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

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.

speed key See *communication key.*

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.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

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 *basis* 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.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft system.

	For example, processes that import data from Microsoft Project into PeopleSoft applications create transaction rows with a source code of MSP (Microsoft Project).
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.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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.
third party	A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.
3C engine	Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
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.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

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 *value-added tax exception.* 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 *value-added tax exempt.* 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 *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* 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.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

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 link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

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 *zero-rated value-added tax.* 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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