Oracle® Project Resource Management

User Guide

Release 12.1

Part No. E13493-02

April 2009

ORACLE®

Oracle Project Resource Management User Guide, Release 12.1

Part No. E13493-02

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle Project Resource Management User Guide.*

This guide contains the information you need to understand and use Oracle Project Resource Management.

See Related Information Sources on page viii for more Oracle Applications product information.

TTY Relay Access to Oracle Support Services

To reach AT&T Customer Assistants, dial 711 or 1.800.855.2880. An AT&T Customer Assistant will relay information between the customer and Oracle Support Services at 1.800.223.1711. Complete instructions for using the AT&T relay services are available at http://www.consumer.att.com/relay/tty/standard2.html. After the AT&T Customer Assistant contacts Oracle Support Services, an Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.

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Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Structure

1 Overview of Oracle Project Resource Management

This chapter describes the process flows and concepts of Oracle Project Resource Management.

2 Staffing Project Requirements

This chapter describes the creation and structures of project teams within Oracle Project Resource Management.

3 Candidate Management

This chapter contains instructions for searching for resources to fill requirements and managing the nomination and tracking process.

4 Schedule Maintenance

This chapter discusses the assignment approval workflow process and handling overcommitments.

5 Staffing Management

This chapter describes the staffing manager, resource manager, and team member activities.

Related Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Projects.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for

integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF** - PDF documentation is available for download from the Oracle Technology Network at http://otn.oracle.com/documentation.

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **About Documents and Release Notes** - Refer to the About Document or Release Notes for the mini-pack or family pack that you have installed to learn about new documentation or documentation patches that you can download. About Documents and Release Notes are available on My Oracle Support.

- **My Oracle Support Knowledge tab** - The My Oracle Support Knowledge tab lets you browse the knowledge base by technology, industry, integration, application, documentation, training, and services, to find all documents for a product area. Use the Knowledge Home to search for release-specific information, such as FAQs, recent patches, alerts, white papers, troubleshooting tips, and other archived documents.

- **Oracle eBusiness Suite Electronic Technical Reference Manuals -** Each Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications and integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on My Oracle Support as part of Online Documentation.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Projects (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent programs.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Oracle Projects Documentation Set

Oracle Projects Implementation Guide

Use this guide to implement Oracle Projects. This guide also includes appendixes covering function security, menus and responsibilities, and profile options.

Oracle Projects Fundamentals

Oracle Project Fundamentals provides the common foundation shared across the Oracle Projects products (Project Costing, Project Billing, Project Resource Management, Project Management, and Project Portfolio Analysis). Use this guide to learn fundamental information about the Oracle Projects solution.

This guide includes a Navigation Paths appendix. Use this appendix to find out how to access each window in the Oracle Projects solution.

Oracle Project Billing User Guide

This guide shows you how to use Oracle Project Billing to define revenue and invoicing rules for your projects, generate revenue, create invoices, and integrate with other Oracle Applications to process revenue and invoices, process client invoicing, and measure the profitability of your contract projects.

Oracle Project Costing User Guide

Use this guide to learn detailed information about Oracle Project Costing. Oracle Project Costing provides the tools for processing project expenditures, including calculating their cost to each project and determining the General Ledger accounts to which the costs are posted.

Oracle Project Management User Guide

This guide shows you how to use Oracle Project Management to manage projects through their lifecycle - from planning, through execution, to completion.

Oracle Project Portfolio Analysis User Guide

This guide contains the information you need to understand and use Oracle Project Portfolio Analysis. It includes information about project portfolios, planning cycles, and metrics for ranking and selecting projects for a project portfolio.

Oracle Projects Glossary

This glossary provides definitions of terms that are shared by all Oracle Projects applications. If you are unsure of the meaning of a term you see in an Oracle Projects guide, please refer to the glossary for clarification. You can find the glossary in the online help for Oracle Projects, and in the Oracle Projects Fundamentals book.

User Guides Related to This Product

Oracle Assets User Guide

In Oracle Assets, you can post capital project costs to become depreciable fixed assets. Refer to this guide to learn how to query mass additions imported from Oracle Projects to Oracle Assets and to review asset information. Use this guide to understand the implementation steps required for application use, including defining depreciation books, depreciation method, and asset categories. It also contains information on setting up assets in the system, maintaining assets, retiring and reinstating assets, depreciation, group depreciation, accounting and tax accounting, budgeting and budgetary control, online inquiries, impairment processing, and Oracle Assets reporting. This guide also includes a comprehensive list of profile options that you can set to customize application behavior.

Oracle U.S. Federal Financials Implementation Guide

This guide provides information on how to implement Oracle U.S. Federal Financials. Use this guide to learn about the steps required to set up account codes, Federal reporting, subledger accounting, and other features used by U.S. Federal agencies and businesses that work with U.S. Federal agencies.

Oracle U.S. Federal Financials User Guide

This guide gives instructions for using Oracle U.S. Federal Financials. This product provides the basis for an integrated financial management solution for Federal agencies, providing features such as budgetary control, fund accounting, online funds checking, cost accumulation and allocation, United States Standard General Ledger (US SGL) accounts, Treasury cash accounts, regulatory and ad hoc reporting, multiple fund receivables accounting, and multiple organization capabilities.

Oracle Financials Implementation Guide

This guide describes how to implement the Oracle Financials E-Business Suite. It takes you through the steps of setting up your organizations, including legal entities, and their accounting, using the Accounting Setup Manager. You can find information on intercompany accounting and sequencing of accounting entries with relevant examples.

Oracle General Ledger Implementation Guide

This guide provides information on how to implement Oracle General Ledger. Use this guide to understand the implementation steps required for application use, including how to set up Accounting Flexfields, Accounts, and Calendars.

Oracle General Ledger User's Guide

This guide provides you with information on how to use Oracle General Ledger. Use

this guide to learn how to create and maintain ledgers, ledger currencies, budgets, and journal entries. This guide also includes information about running financial reports.

Oracle Grants Accounting User Guide

This guide provides you with information about how to implement and use Oracle Grants Accounting. Use this guide to understand the implementation steps required for application use, including defining award types, award templates, allowed cost schedules, and burden set up. This guide also explains how to use Oracle Grants Accounting to track grants and funded projects from inception to final reporting.

Oracle HRMS Documentation Set

This set of guides explains how to define your employees, so you can give them operating unit and job assignments. It also explains how to set up an organization (operating unit). Even if you do not install Oracle HRMS, you can set up employees and organizations using Oracle HRMS windows. Specifically, the following manuals will help you set up employees and operating units:

- **Oracle HRMS Enterprise and Workforce Management Guide**

  This user guide explains how to set up and use enterprise modeling, organization management, and cost analysis.

- **Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide**

  Use this guide to find out about setting up employees and managing your people resources.

Oracle Internet Expenses Implementation and Administration Guide

This guide explains how to configure Oracle Internet Expenses and describes its integration with other applications in the E-Business Suite, such as Oracle Payables and Oracle Projects. It describes the implementation steps required for application use, including how to set up policy and rate schedules, credit card policies, audit automation, and the expenses spreadsheet. You can also learn about the client extensions that you can use to extend the Oracle Internet Expenses functionality.

Oracle Inventory User's Guide

If you install Oracle Inventory, refer to this manual to learn how to define project-related inventory transaction types and how to enter transactions in Oracle Inventory. This manual also describes how to transfer transactions from Oracle Inventory to Oracle General Ledger.

Oracle Payables Implementation Guide

This guide provides you with information on how to implement Oracle Payables. Use this guide to understand the implementation steps required for how to set up suppliers,

payments, accounting, and tax.

Oracle Payables User's Guide

This guide describes how to use Oracle Payables to create invoices and make payments. In addition, it describes how to enter and manage suppliers, import invoices using the Payables open interface, manage purchase order and receipt matching, apply holds to invoices, and validate invoices. It contains information on managing expense reporting, procurement cards, and credit cards. This guide also explains the accounting for Payables transactions.

Oracle Payments Implementation Guide

This guide describes how Oracle Payments, as the central payment engine for the Oracle E-Business Suite, processes transactions, such as invoice payments from Oracle Payables, bank account transfers from Oracle Cash Management, and settlements against credit cards and bank accounts from Oracle Receivables. This guide also describes how Oracle Payments is integrated with financial institutions and payment systems for receipt and payment processing, known as funds capture and funds disbursement, respectively. Additionally, the guide explains to the implementer how to plan the implementation of Oracle Payments, how to configure it, set it up, test transactions, and how to use it with external payment systems.

Oracle Project Manufacturing Implementation Manual

Oracle Project Manufacturing allows your company to associate manufacturing costs and inventory with a project and task. Use this manual as your first source of information if you are implementing Oracle Project Manufacturing.

Oracle Property Manager Implementation Guide

Use this guide to learn how to implement Oracle Property Manager and perform basic setup steps such as setting system options and creating lookup codes, contacts, milestones, grouping rules, term templates, and a location hierarchy. This guide also describes the setup steps that you must complete in other Oracle applications before you can use Oracle Property Manager.

Oracle Property Manager User Guide

Use this guide to learn how to use Oracle Property Manager to create and administer properties, space assignments, and lease agreements.

Oracle Public Sector Financials User Guide

Oracle Public Sector Financials is an overlay of features that extend the existing functionality of Oracle Financials for the specific needs of the public sector. This guide provides information about setting up and using Oracle Public Sector Financials. These features include multi-fund accounts receivable, encumbrance reconciliation reports,

Governmental Accounting Standards Board (GASB) 34/35 asset accounting, enhanced funds available inquiry, the Funds Available Detail report, and the Funds Check API.

Oracle Purchasing User's Guide

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. This guide also describes how to manage your supply base through agreements, sourcing rules, and approved supplier lists. In addition, this guide explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement processes.

Oracle Receivables User Guide

This guide provides you with information on how to use Oracle Receivables. Use this guide to learn how to create and maintain transactions and bills receivable, enter and apply receipts, enter customer information, and manage revenue. This guide also includes information about accounting in Receivables. Use the Standard Navigation Paths appendix to find out how to access each Receivables window.

Oracle Subledger Accounting Implementation Guide

This guide provides setup information for Oracle Subledger Accounting features, including the Accounting Methods Builder. You can use the Accounting Methods Builder to create and modify the setup for subledger journal lines and application accounting definitions for Oracle subledger applications. This guide also discusses the reports available in Oracle Subledger Accounting and describes how to inquire on subledger journal entries.

Oracle Time & Labor Implementation and User Guide

This guide describes how to capture work patterns such as shift hours so that this information can be used by other applications such as Oracle General Ledger and Oracle Projects.

Installation and System Administration

Oracle Applications Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12, or contemplating significant changes to a configuration. After describing the Oracle Applications architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle Applications Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle Applications. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle Applications Release 12, or as part of an upgrade from Release 11*i* to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

Oracle Applications Maintenance Utilities

Use this guide to help you run the various Applications DBA (AD) utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle Applications file system and database.

Oracle Applications System Administrator's Guide Documentation Set

This documentation set provides planning and reference information for the Oracle Applications System Administrator. *Oracle Applications System Administrator's Guide - Configuration* contains information on system configuration steps, including defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help. *Oracle Applications System Administrator's Guide - Maintenance* provides information for frequent tasks such as monitoring your system with Oracle Applications Manager, administering Oracle E-Business Suite Secure Enterprise Search, managing concurrent managers and reports, using diagnostic utilities including logging, managing profile options, and using alerts. *Oracle Applications System Administrator's Guide - Security* describes user management, data security, function security, auditing, and security configurations.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle Applications. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Other Implementation Documentation

Oracle Applications Multiple Organizations Implementation Guide

This guide describes how to set up and use Oracle Projects with the Multiple
Organization feature for Oracle applications, so you can define and support different
organization structures when running a single installation of Oracle Projects.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle
Applications product that includes workflow-enabled processes, as well as how to
monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize
existing Oracle Applications-embedded workflow processes. It also describes how to
define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow
notifications and monitor the progress of their workflow processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle
Projects implementation team, as well as for users responsible for the ongoing
maintenance of Oracle Applications product data. This guide also provides information
on creating custom reports on flexfields data.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle
Applications development staff. It describes the UI for the Oracle Applications products
and tells you how to apply this UI to the design of an application built by using Oracle
Forms.

Oracle iSetup User Guide

This guide describes how to use Oracle iSetup to migrate data between different
instances of the Oracle E-Business Suite and generate reports. It also includes
configuration information, instance mapping, and seeded templates used for data
migration.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle Applications report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts.

Oracle E-Business Suite Diagnostics User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests in the Oracle E-Business Diagnostics framework.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Projects and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Projects working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Overview of Oracle Project Resource Management

This chapter describes the process flows and concepts of Oracle Project Resource Management.

This chapter covers the following topics:

- Introduction to Oracle Project Resource Management

- Process Flows and Concepts

- Setup Considerations

Introduction to Oracle Project Resource Management

Oracle Project Resource Management provides you tools to manage the deployment and capacity of your resources in a global environment. You use Oracle Project Resource Management--in conjunction with the basic project team definition functionality in Oracle Projects and the task staffing and forecasting functionality in Oracle Project Management--to manage your project resource needs, project profitability, and organization utilization, by locating and deploying qualified and available resources to your projects across your enterprise.

Oracle Project Resource Management enables project managers, resource managers, and staffing managers throughout the enterprise to manage their resources and more effectively communicate their needs to one another.

Features include:

- Searching for:

  - Qualified resources to match requirements

  - Requirements for which resources may nominate themselves

- Maintaining resource competency information

- Advertising for open requirements

- Tracking candidates for requirements

- Handling overcommitments

- Automatically processing approvals

Related Topics

Project Teams and Team Roles, *Oracle Projects Fundamentals*

Creating Task Assignments, *Oracle Project Management User Guide*

Generating Forecasts, *Oracle Project Management User Guide*

Process Flows and Concepts

You can divide the overall process flow of Oracle Project Resource Management into four segments: demand, supply, financial and operations management. Each segment has associated user roles.

Understanding the process flows and user concepts of resource management in Oracle Projects provides you with the appropriate knowledge for making decisions for your implementation.

Oracle Project Resource Management addresses the core staffing needs of the project life cycle. It pulls together the demand and supply of resources, to produce the operations and financial success of your projects.

Oracle Project Resource Management Process Flow

The process flow of resource management in Oracle Projects is divided into four segments: Demand, Supply, Financial, and Operations Management. These segments incorporate the staffing functionality provided by Oracle Project Resource Management with the project team development features available to all Oracle Projects users and the Oracle Projects Management functionality related to task-level resource assignments and forecast generation.

Each segment can be associated with a typical user role such as project manager, resource manager, staffing manager, team role, or financial analyst. These associations are not rigid but can overlap.

The following diagram illustrates how the different needs of the users can use the same data through process flows.

Oracle Project Resource Management Process Flow
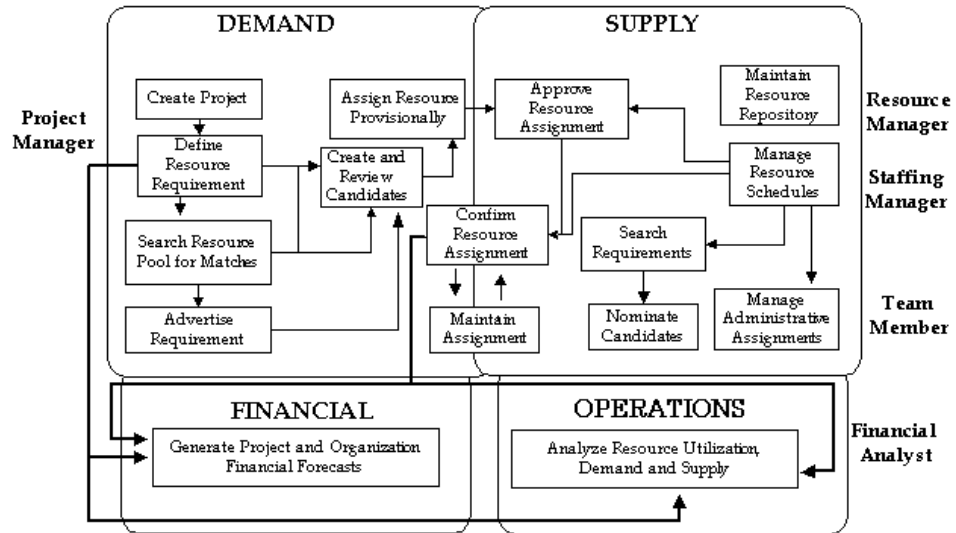
The objectives of the user's role on a project drives the functions that the user must perform. The implementation of Oracle Project Resource Management provides predefined roles to which you can add your own. In the above diagram, typical user roles are associated with the applicable process segments. For example, a Financial Analyst performs tasks related to financial management, and a Project Manager concentrates on tasks relating to project staffing from the demand side.

Project Manager

Project managers concentrate on project execution in the demand segment. Project managers create the project and define project-level resource requirements. They may also search the resource pool for matches and advertise for the requirement. They can then review the candidates on project requirements and create a provisional assignment for a selected resource. The provisional assignment is forwarded to the resource manager for approval. The project manager can bypass the search process and make a direct provisional assignment of the resource to the project. The project manager maintains the assignment based on changes to the project schedule.

> **Note:** The ability to create and maintain project-level requirements and assignments is provided by all Oracle Projects applications. Oracle Project Resource Management specifically enables resource searching, requirement advertisement, and approval routing. For more information about defining project teams through requirements and

assignments, see Project Teams and Team Roles, *Oracle Projects Fundamentals*.

Oracle Project Management also enables project managers to create task-level resource assignments. They can also easily create project-level resource assignments for planning resources that have previously only been given task-level assignments. For more information, see Creating Task Assignments, *Oracle Project Management User Guide*.

Resource Manager

Resource managers concentrate on the supply segment, i.e. resources. Resource managers approve the resource assignments, and manage the resource repository. They typically are the HR supervisors of the resource.

Staffing Manager

Staffing managers also concentrate on the supply segment, i.e. resources. They are the users who have been charged with managing staffing. Staffing managers manage the resource schedules. They search requirements, nominate candidates to fill open requirements, and manage administrative assignments. They can also approve, confirm, and maintain resource assignments, if they have the necessary permissions.

Team Member

Team members are the resources of the project. They concentrate on performing the work. Team members can view their project assignments schedules, search for requirements and nominate themselves as candidates.

Financial Analyst

Financial analysts concentrate on the financial and operations segment. Financial Analysts analyze resource utilization.

If you use Oracle Project Management, your financial analysts can also generate project and organization financial forecasts.

Related Topics

Project Teams and Team Roles, *Oracle Projects Fundamentals*

Creating Task Assignments, *Oracle Project Management User Guide*

Generating Forecasts, *Oracle Project Management User Guide*

Utilization, *Oracle Projects Fundamentals*

User Roles

Oracle Project Resource Management provides functionality to meet the needs of

several key user scenarios, each with its own set of responsibilities and related task flows. You can adapt these scenarios into your environment, or modify them accordingly.

You have the following user roles to address the issues of project staffing:

- Project Manager

- Staffing Manager

- Staffing Owner

- Resource Manager

- Team Member

- Business Manager

Project Manager

A project manager is the primary owner of a project. The project manager is generally responsible for maintaining a project through its life cycle from creation, building a team, tracking and maintenance, forecasting financial information for the project, and reporting. Building a team involves adding requirements, searching for resources in the resource pool, adding assignments, and creating and maintaining candidates for requirements.

The project manager initiates the creation of the project and requirements. In order to fill the requirements, the project manager must perform searches from which candidates can be identified. Once a candidate is selected, a provisional assignment is created for the resource. The provisional assignment is forwarded to the resource manager or primary contact for approval. If the project manager wants specific persons to fill requirements, the search step can be bypassed and direct provisional assignments can be made.

> **Note:** Functionality related to the creation of project roles, requirements, and assignments is common to all Oracle Projects applications. Oracle Project Resource Management enables specialized staffing functionality, such as candidate searching and approval routing. For more information, see Project Teams and Team Roles, *Oracle Projects Fundamentals*.

Maintaining a project includes maintaining project-related information such as project definition, schedules, and assignments. In addition, project managers often act as a primary contact for workflow notifications for the project.

Typical tasks of a project manager include:

- Building and managing teams.

- Creating and maintaining project resource requirements.

- Adding customer and partner organizations to projects to provide project roles for customers.

- Creating and applying a predefined set of requirements on a project by applying team templates to projects.

- Identifying resources from the planning resource list to fill the open team roles.

- Nominating candidates, reviewing candidates, and selecting the desired candidate to assign to fill a requirement (and by doing so, create an assignment).

- Creating and maintaining project resource assignments.

- Creating and maintaining task resource assignments.

- Viewing resource details and team schedule.

- Maintaining schedules for requirements and for resources on assignments.

- Generating project financial forecast information for one project or multiple projects based on authority.

- Viewing balances of unbilled receivables and unearned revenue for a project or a specific cost center in a project.

You must use Oracle Projects Management in order to generate financial forecasts. For more information, see Generating Forecasts, *Oracle Project Management User Guide*.

You must use Oracle Projects Management to create resource assignments at the task level. For more information, see Creating Resource Assignments, *Oracle Project Management User Guide*.

For more information on utilization reporting, see the following Discoverer Workbooks, *Oracle Projects Fundamentals*:

- Required Project Hours

- Team Role Details

Staffing Manager

Staffing managers are responsible for filling open requirements of a project with available resources. They fill the supply side of the task flows as they have access to all the resource data, know the availability of their resources, and manage the schedules and utilization of the resources. Staffing managers search for resources, nominate candidates, and fill open requirements, and can also approve assignments with the proper authority.

> **Note:** Functionality related to the management of project requirements and assignments is common to all Oracle Projects applications. Oracle Project Resource Management enables specialized staffing functionality, such as resource searching, competency tracking, candidate nomination and approval routing. For more information about team roles, requirements, and assignments, see Project Teams and Team Roles, *Oracle Projects Fundamentals*.

Upon identifying a possible match between a resource and an open role after considering competencies, schedule, job levels, and other comparable criteria, a staffing manager can nominate the resource as candidate for the requirement.

A staffing manager can also add assignments to administrative projects for managing activities such as off-site activities and training for the resources. Other duties include tracking resource schedules to minimize available time and increase utilization.

Typical tasks of a staffing manager include:

*   Maintaining resource repository by updating information about resources. This information is used to match resources to requirements.

*   Searching for requirements based on information such as time periods, required skills, and project types.

*   Nominating available resources as candidates to requirements.

*   Creating Administrative Assignments: Administrative assignments are regular assignments on indirect projects (projects which are non-revenue generating.) Administrative assignments such as vacation, training, and off-site activities are generally not included in forecast and utilization totals.

*   Maintaining schedules for resources, identifying overcommitted and available resources, and approving resource assignments.

*   Maintaining schedules for requirements and for resources on assignments.

*   Identifying resources from resource repository to fill the open roles.

*   Viewing projects details for both scheduled projects and pipeline activity.

*   Tracking utilization totals for the organization and resources.

For more information on utilization reporting, see the following Discoverer Workbooks, *Oracle Projects Fundamentals*:

*   Scheduled Resource Hours

*   Available Resource Hours

- Overcommitted Resource Hours

- Team Role Details

- Required Project Hours

- Organization Competence Summary

Staffing Owner

A staffing owner is a person who is responsible for staffing project team roles and maintaining their information. Staffing ownership can be tracked at the organization, project, and requirement level.

- *Organization-level staffing ownership:* Staffing owners with organization-level authority are referred to as staffing managers. They own staffing for all project team roles in the organization, and can perform mass updates on a group of requirements to transfer their staffing ownership to other staffing owners. Organization-level staffing owners are essentially staffing managers. For more information about the Staffing Manager role, see Staffing Manager, page 1-6.

- *Project-level staffing ownership:* Staffing owners with project-level staffing ownership are referred to as project staffing owners. They are responsible for staffing team roles on specific projects. Multiple project staffing owner roles can be defined for individual projects. This enables sharing of responsibility for team role maintenance.

- *Responsibility-level staffing ownership:* Staffing owners with responsibility-level staffing ownership are referred to simply as staffing owners. They are responsible for staffing and maintaining individual requirements and assignments. Project managers can define a responsible staffing owner for each requirement in their project. Staffing owners have visibility only over the requirements to which they have been assigned.

Typical tasks of a staffing owner include:

- Updating owned requirements and assignments, with the exception of financial information.

- Searching for resources.

- Receiving candidate notifications for requirements.

- Nominating candidates for requirements.

- Assigning resources to requirements.

Resource Manager

A resource manager is the HR Manager or supervisor of the resource. Resource managers participate in managing resource schedules, creating and maintaining administrative projects, adding assignments to the administrative projects, resource approvals, performing utilization analysis, and managing the schedules and utilization of their direct reports (resources).

A resource manager can also add assignments to administrative projects for managing activities such as off-site activities and training for the resources. Other duties include tracking resource schedules to minimize available time and increase utilization.

Typical tasks of a resource manager include:

- Maintaining resource repository by updating information about resources. This information is used to match resources to requirements.

- Searching for open roles (requirements) based on information such as time periods, required skills, and project types.

- Nominating available resources as candidates to requirements.

- Creating Administrative Assignments: Administrative assignments are regular assignments on indirect projects (projects which are non-revenue generating.) Administrative assignments such as vacation, training, and off-site activities are generally not included in forecast and utilization totals. For more information about this topic, see Creating Administrative Assignments, *Oracle Projects Fundamentals*.

- Maintaining schedules for resources, identifying overcommitted and available resources, and approving resource assignments.

- Tracking utilization totals for the resources.

For more information on utilization reporting, see the following Discoverer Workbooks, *Oracle Projects Fundamentals*:

- Scheduled Resource Hours

- Available Resource Hours

- Overcommitted Resource Hours

- Team Role Details

- Required Project Hours

- Organization Competence Summary

- Resource Competencies

Team Member

Team members are the resources. They can manage their own competence profiles and work information through the shared professional model of Self-Service Human Resources. Team members can also view their schedule of project assignments and search for requirements to nominate themselves as candidates.

Typical tasks of a team member include:

- Maintaining resource repository by updating the resource information. This information is used to match resources to requirements.

- Viewing their own resource utilization

- Searching for open roles (requirements) based on information such as time periods, required skills, and project types.

- Nominating themselves as candidates for requirements.

- Maintaining their own schedules by tracking their project and task assignments and making adjustments to their work patterns given the proper authority.

- Using Administrative Assignments: Administrative assignments are regular assignments on indirect projects (projects which are non-revenue generating.)

For more information about team roles, requirements, and assignments, see Project Teams and Team Roles, *Oracle Projects Fundamentals*.

For more information about administrative requirements, see Creating Administrative Assignments, *Oracle Projects Fundamentals*.

For more information about resource assignments for tasks, see Creating Resource Assignments, *Oracle Project Management User Guide*.

Business Manager

A business manager is primarily associated with a group of projects and is responsible for the financial numbers for these projects. Business managers can track project statuses, perform reporting analysis, and view resource utilization. Business managers can also access financial forecasts for a single project, a group of projects, or an organization.

Typical tasks of a business manager include:

- Viewing the team directory and the role information.

- Generating financial forecasts for one project or multiple projects based on authority.

- Generating financial forecasts for an organization manager's area of responsibility.

- Tracking utilization totals for the organization.

- Viewing balances of unbilled receivables and unearned revenue accounts for a project or a specific cost center in a project.

For more information on team roles, see Project Teams and Team Roles, *Oracle Projects Fundamentals*.

You must use Oracle Projects Management in order to generate financial forecasts. For more information, see Generating Forecasts, *Oracle Project Management User Guide*.

For more information on utilization reporting, see the following Discoverer Workbooks, *Oracle Projects Fundamentals*:

- Scheduled Resource Hours

- Available Resource Hours

- Overcommitted Resource Hours

- Team Role Details

- Required Project Hours

- Organization Competence Summary

- Resource Competencies

Related Topics

Staffing Plan, *Oracle Projects Fundamentals*

Setup Considerations

Since Oracle Project Resource Management is integrated with applications such as Oracle Human Resources Management System (HRMS), and Oracle CRM, many interdependencies exist. A large portion of the information is loaded through these applications.

Determining the Deployment Method

Prior to implementing Oracle Project Resource Management, you must determine how you want to handle project staffing. You have three possible approaches in addressing who manages the task of project staffing:

- Centralized

  The centralized approach uses staffing analysts (resource analysts.) These analysts are responsible for managing requirements and assignments for all the projects of

an organization.

- Decentralized

    The decentralized approach uses project managers, or project assistants, who work with resource managers to fill project requirements.

- Combination

    The combination approach is used by companies who have all these roles interacting in the effort to fill project requirements and to obtain the highest utilization of the available resources.

Creating and Maintaining Project Resources

All organization and people data is stored in Oracle Human Resources Management System (HRMS) tables. As most of these tables are shared, you can enter this information using Oracle HRMS and access the information through other Oracle applications such as Oracle Projects. However, if your business does not currently use Oracle HRMS, you can define people through Oracle Projects. In the context of Oracle HRMS and Oracle Projects, the term *people* refers to *employees* and *contingent workers*.

For information on implementing Oracle Project Resource Management, see Implementing Oracle Project Resource Management, *Oracle Projects Implementation Guide*. For information about contingent workers, see: Support for Contingent Workers, *Oracle Projects Fundamentals*.

Oracle Project Resource Management acquires resource information from the HRMS people tables. The resource information is obtained either through an automated deferred workflow process or by manually running the PRC: Maintain Project Resources process. See, Processes in Oracle Projects, *Oracle Projects Fundamentals*. The PA: HR Related Updates workflow process synchronizes the Oracle HRMS data with the Project Resource Management data automatically for the following situations:

- Changes are made to the resource profile

- When a person is added as a project member on a project and does not yet exist as a resource in Project Resource Management

The following criteria must be met in order for a person to be acquired from the HRMS system and qualify as a valid resource:

- The resource must have an active and current primary assignment.

- The resource must have a person type of Employee or Contingent Worker, or a person type that maps to the system person type of Employee.

- The end date of the assignment should be later than the current (system) date.

- The primary assignment must have a defined job. This job must be mapped to a master job group with an associated job level.

- The primary assignment organization must:
  - have a default operating unit; this operating unit must implement Oracle Projects
  - Have a specified default calendar or, the profile option PA: Default Calendar must have a defined value
  - Have the classification of Project Expenditure/Event Organization
  - Belong to the project expenditure hierarchy

  If you have a problem with acquiring information for a particular resource into Project Resource Management and you have verified all of the qualifying criteria, contact your system administrator for assistance.

Future-Terminated People

Oracle Human Resource Management System (HRMS) enables you to terminate schedulable people resources at a future date. A resource is eligible for scheduling based on data that is synchronized from Oracle HRMS. If a resource is terminated in Oracle HRMS, the resource is not eligible for scheduling on project assignments after the termination date.

You can define a fast formula in Oracle HRMS and you can use this in Oracle Projects to determine if an employee is scheduled for involuntary termination. Using this fast formula, you can delay the inactivation of the resource in Oracle Resource Management. For example, assume the current date is 06-July-2007. As of the current date, an employee is scheduled for involuntary termination on 31-July-07. By enabling the fast formula (in Oracle HRMS), you can schedule this employee on a project after 31-July-07. However, when the termination date is reached, you can no longer schedule this employee on a project.

To enable a fast formula, perform the following steps:

1. Define a fast formula in Oracle HRMS.

2. Set the profile options HR: Business Group and HR: Security Profile to *Setup Business Group*.

3. Create the fast formula with the name HR_PA_MOVE. You can copy the seeded formulas of HR_MOVE_TYPE_TEMPLATE or HR_CWK_MOVE_TYPE_TEMPLATE.

4. Set the formula type to *Oracle Payroll*.

5. Define the fast formula to return *V* for a voluntary termination and *I* for involuntary termination. The default value must be set to *V*.

Related Topics

Maintain Project Resources, *Oracle Projects Fundamentals*

Oracle HRMS FastFormula User Guide

Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide

2

Staffing Project Requirements

This chapter describes the creation and structures of project teams within Oracle Project Resource Management.

This chapter covers the following topics:

- Overview of Staffing Project Requirements
- Competencies
- Advertisements and Advertisement Rules
- Candidates

Overview of Staffing Project Requirements

You can staff project requirements based on competencies, advertisements and advertisement rules, and candidates. A set of competencies is defined for every requirement. The requirements are advertised both inside and outside an organization. Suitable candidates whose competencies match the advertisements, page 2-2 are eligible for filling the requirements.

Competencies

The specified role provides default values for the competencies and associated information. However, you can add, modify, or delete as necessary for the requirement.

If a requirement has assigned competencies, a structure exists in which you can perform competence matching to find potential candidates for requirements.

You define project requirements using the Requirement Detail page. The system copies the competencies of the project role to the requirement to which they can add, modify, or delete as meets their needs. Each competence determined to be mandatory for the requirement must have the required range of proficiency specified in that skill. This range is used for comparison during a resource search.

> **Note:** You can assign global competencies to a requirement, as well as local competencies belonging to the business group of the requirement.

Related Topics

Project Teams and Team Roles, *Oracle Projects Fundamentals*

Defining Scheduled Team Members, *Oracle Projects Fundamentals*

Advertisements and Advertisement Rules

Advertisement rules control the visibility of a requirement both inside and outside an organization. An advertisement rule contains actions that direct the channeling and timing of the requirement advertisement. See also: Auditing Advertisement Rules, page 2-4 and Replacing an Advertisement Rule on a Requirement, page 2-4.

For more information about the creation and maintenance of project requirements, see Defining Scheduled Team Members, *Oracle Projects Fundamentals*.

Advertisement Rule for a Requirement

The requirement uses the default advertisement rule of the project. However, you can add, update, or delete the advertisement rule actions, or replace the rule entirely. You also can stop the rule from further processing, and resume the processing when appropriate.

Each action of the advertisement has a qualifying condition. Therefore, in order for the action to occur, the associated condition must be met. The conditions are either the number of days since the advertisement rule was started on the requirement, the number of days remaining until the start date of the requirement, or a combination of the two.

Oracle Project Resource Management evaluates the open requirements that have an advertisement rule with a status of "Started" and performs all of the actions where the conditions are met. This evaluation process called Perform Action Rules is a concurrent program that is scheduled by your system administrator. See, Project Resource Management Processes, *Oracle Project Fundamentals*.

You can use the advertisement rule to control the escalation of a requirement as the current system date nears the requirement start date. To demonstrate the escalation of a requirement, the following table lists an advertisement rule with various actions:

Condition	Action
Days since started: 0	Publish to staffing managers on East Coast

Condition	Action
Days since started: 7	Publish to all resources on East Coast
Days since started: 14 or Days remaining: 14	Update staffing priority to Critical
Days since started: 21 or Days remaining: 7	Send notification to staffing owner of the project
Days since started: 30	Cancel advertisement

As the requirement ages, it becomes visible to more people and the staffing priority is set to Critical. As more time passes, the staffing owner of the requirement is alerted that the requirement is still open, and then, finally the advertisement for the requirement is canceled. When you fill a requirement, the advertisement rule on the requirement stops and does not perform any outstanding actions.

Using Advertisement Rules

Each project has a default advertisement rule that is obtained from the project template. You can change this advertisement rule or accept it as is. Subsequently, this advertisement rule becomes the rule for every newly created requirement on the project.

For each requirement, you can either use the predefined actions of the default rule or change the actions to meet your needs. You cannot update performed actions. The actions are as follows:

- **Publish to All**: Make advertisement visible to entire site, across all organizations on the Staffing Home, Requirement List, and Requirement Search Result pages.

- **Publish to Project Authority**: Make requirement visible to people with project authority within a specified organization on the Staffing Home, Requirement List, and Requirement Search Result pages.

- **Publish to Organizations**: Make requirement visible to everyone within a specified organization in a specified organization hierarchy on the Staffing Home, Requirement List, and Requirement Search Result pages.

- **Escalate to Next Level**: Make the requirement visible to everyone in the next level within the organization hierarchy. This action is only valid if the previously defined action is Publish to Organizations.

- **Send Email**: Send an email notice to a specific email address. You can use any external email address. You can also enter multiple email addresses separated by a comma.

- **Send Notification to Person**: Send a notification to a specified person regarding the requirement.

- **Send Notification to Project Role**: Send a notification to a specified role on the requirement-owning project.

- **Update Staffing Priority**: Update the staffing priority of the requirement.

- **Cancel Advertisement**: Remove visibility of the requirement in all pages and searches. This action automatically occurs when a requirement is filled.

You can indicate to either begin the advertisement rule automatically upon the requirement creation, or activate the rule manually for each requirement. You can pause the advertisement rule or resume at any time.

If you change the start date of the requirement or update the advertisement rule, the system re-evaluates and processes all of the advertisement rule actions as follows:

- Reverses any actions that have been performed but do not meet the criteria.

- Initiates any actions that have not been performed and do meet the criteria.

Replacing an Advertisement Rule on a Requirement

You can replace an advertisement rule on a requirement at any time. When you replace a started advertisement rule, Project Resource Management reverses any actions on that rule that have been performed. The system also performs any qualified actions of the new advertisement rule.

For example, you advertise a requirement to a particular division within the organization as a result of an advertisement rule action, and then, you replace the rule on the requirement. The system reverses that action and the requirement is no longer visible in requirement searches performed within that division. Then, the system evaluates the actions on the new rule and performs those where the conditions are met.

Auditing Advertisement Rules

Every time the system performs an advertisement rule action on a requirement, a recording entry appears in the advertisement audit history of the requirement. The entry provides you with information on the action including the qualifying condition, the date the action was performed, and the result of the action.

Each action can generate multiple transactions, and therefore cause multiple entries in the audit history . For example, when the action Publish to Organizations occurs, then an entry appears for each organization in the hierarchy under the specified

organization. If the specified organization has five suborganizations, then five entries appear.

Each audit entry includes an audit reason. The explanations of the reasons you may see are as follows:

- **Condition Met**: The action was performed because the condition was met.

- **Deleted**: The action was reversed because the action was deleted.

- **Updated**: The action was reversed because the requirement start date was updated.

- **Rule Canceled**: The action was reversed because the advertisement rule was canceled.

- **Rule Cancellation Deleted**: The action is re-activated because the Cancel Advertisement action was deleted.

> **Note:** If the system cannot perform an action, then an error explaining why the action failed appears in the audit history.

Candidates

All active candidates for the requirement appear in the order of ranking value, then score. You can change the weighting values for the score on the Candidate Score and Search Settings page. Any change in these weightings is immediately reflected in the score of the current candidates.

3

Candidate Management

This chapter contains instructions for searching for resources to fill requirements and managing the nomination and tracking process.

This chapter covers the following topics:

- Overview of Candidate Management
- Resource Search
- Candidate Nomination and Approval

Overview of Candidate Management

You use the resource pool to search for eligible candidates. Candidates are the nominated resources for open requirements. After the Oracle workflow approval, candidates work for a project.

Candidate Lifecycle

The candidate life cycle begins with the search for candidates for open requirements. Candidates are nominated for requirements, their qualifications and competencies reviewed, and finally selected and assigned.

The candidates can also be assigned directly to fill the requirement. The team roles and staffing processes have some required and optional predefined behavior. You can define this default behavior through profile options, statuses, and other attributes.

Related Topics

Project Requirements, *Oracle Projects Fundamentals*

Project Assignments, *Oracle Projects Fundamentals*

Implementing Oracle Project Resource Management *Oracle Projects Implementation Guide*

Resource Search

You perform resource searches primarily to fill a resource requirement on a project. They can also be performed independent of filling a specific requirement and to just search the resource repository for having specific resources.

For more information about the creation and maintenance of project requirements and assignments, see Defining Scheduled Team Members, *Oracle Projects Fundamentals*.

When performing a resource search for a requirement, the dates of the requirement are compared with the availability of the resource. If these time periods match, the resource is considered a candidate for the requirement given the other search criteria for the requirement also matches.

Only valid resources (including future-date people) are considered in resource search queries. Valid resources include both employees and contingent workers. In order for a person to be considered a qualified resource within Oracle Project Resource Management, certain criteria must be met. For a complete list of the criteria, see: Processes in Oracle Projects, *Oracle Projects Fundamentals*. For information about contingent workers, see: Support for Contingent Workers, *Oracle Projects Fundamentals*.

A single collection of your resources, their skill sets, and their availability enables you to utilize and manage your resources both effectively and efficiently. To establish such a resource pool, you must understand your enterprise structure, the job groupings, and the required and desired competencies of the resources.

This section describes the resource pool and how to perform resource searches on it.

Resource Pool Definition and Resource Profile Maintenance

The resource pool is the collection of all your valid resources into a single group. Each individual within your resource pool has various attributes defined such as personal information, work patterns, location, and competencies. Through entering this information as accurately as possible, you gain the following benefits:

- Resources with consistent information from which to search

- Secured single-source access to information such as personal information, resume, and competencies

- Precision in matching resources with requirements

- Forecasting based on resource needs

- Resource utilization manageability

Search Criteria

When searching your resource pool for potential matches to requirements you specify criteria to limit the search. You can also search for a resource that meets specific criteria outside the context of a project requirement. This search includes all the attributes used for the requirement-based resource search. You can access this search when you log in using your responsibility.

> **Note:** For a requirement-based resource search, the default search criteria values are based on the requirement definition.

You can refine the search on your resource pool to match resources to a requirement with the following fields:

Organizational Hierarchy

This field value identifies the project expenditure/event organization hierarchy in which to conduct the search for resources. The default hierarchy value is the project expenditure hierarchy assigned to the operating unit for your current logon responsibility. You can change this value to any project expenditure/event organization hierarchy.

Starting Organization

This field value identifies the organization from which to start the search within the specified project expenditure/event organization hierarchy.

Minimum Availability

The minimum required definite availability match percentage of the resource to be returned as a match, based on the confirmed assignments of the resource.

The availability of a resource is considered from the current system date and does not reflect any past dates. For example, you have a requirement that spans four weeks with the start date that began last week. If a resource is found to have the next three weeks 100% available, then that resource is considered as a 100% match without any regard to the availability of the resource for the first week of the requirement. A resource search will not return results if the end date of the requirement is earlier than the current date.

In order for a resource to qualify for the search results, the resource must have availability records for at least a portion of the assignment duration. An availability record represents each day a resource has availability. These records are generated for a specific time period in the future for every resource. The specific time period is determined by the profile option PA: Availability Duration. For example, if you have a requirement with a time length of two years, and a qualified resource has availability records for only the next year, the resource is still delivered in the search results as a potential match.

You can view the availability of a resource on the timeline on the Resource Details page. The displayed availability may not be correct if the resource does not have an assigned calendar for the duration of the requirement or the calendar schedules have not been generated or updated for the period. See also, Availability Percentages, page 3-7.

Candidate Score Weightings

The weightings default from the requirement, but can be changed while performing a resource search. For more information, see Candidate Score Weightings, page 3-9.

Optional Search Criteria

In addition to specific search criteria, you can also search for resources using the following optional search criteria:

Include Provisional Assignments in Availability Calculation

If selected, the Minimum Availability percentage specified above is calculated using both the confirmed and provisional assignments. This means that the resource must have both a definite and potential availability match percentage greater than the minimum availability percentage specified, in order to be returned. For more information, see Availability Percentages, page 3-7.

Minimum and Maximum Job Levels

Each project requirement has defined minimum and maximum job levels for the purpose of resource searching. During a search, the job levels of the resources are compared to the minimum and maximum job levels of the requirement. If the job level of a resource falls between the minimum and maximum job levels of the requirement, the resource is considered a possible match for the requirement given other search criteria are met.

The default values of the Minimum and Maximum Job Level fields come from the levels defined on the requirement, but you can modify them on the Modify Search Criteria page. Modifying these values on this page does not change the original definition on the requirement. The original definition of the requirement is available on the Requirement Details page.

The minimum and maximum job levels are based on the job levels associated with the job group specified as the value for the profile option PA: Project Resource Job Group. For this profile option, you enter the name of the job group you want used as the collection of jobs included in searches. This profile option is set at the site level only.

You can use the master job group as the value of this profile option, but remember that it includes every job. If you have jobs that you do not want included in job searches such as accounts payable jobs, administrative jobs, and human resource jobs that are not related to staffing projects, then you can set up a separate job group specifically for searching. This job group should include all jobs that you want included in searches.

Competencies

All mandatory and optional competencies of the requirement are compared to those of the resource. Resources with the mandatory competencies and desired competence levels are potential matches given the other search criteria are met. If a competence associated with a resource or requirement has no defined proficiency level, then it is considered to be at the lowest proficiency level.

For each matching resource, the matches between the optional competencies of the requirement and the competencies of the resource display in the following format: 0/2. The first number indicates the number of matches, and the second number refers to the actual number of optional competencies of the requirement. For example, 4/5 means that the resource has four of the five optional competencies at the specified proficiency level for the requirement.

The competencies in the search criteria page default from the competencies defined for the requirement. However, you can modify these competencies and their associated proficiency levels and mandatory flag settings on this page. Your modifications are specific to this search only, and do not change the original definition on the requirement.

In addition to specifying individual competencies, you can also just specify a parent competence, where a parent competence is a rollup of many competencies with the same competence structure. All resources with any competence in that parent competence at the specified proficiency level will be considered as match for the criteria. For example, you can search for resources that have skill in the parent competence "Oracle Technical...", instead of specifying the detailed child competencies within the parent, such as "Oracle Technical: SQL" or "Oracle Technical: PLSQL" or "Oracle Technical: Forms."

To speed up your competence entry in your search criteria, you can copy role competencies predefined roles. For example, if you are searching for a database engineer, instead of entering in each competence for the database engineer, you can copy the already defined competencies associated with the role of the database engineer.

Include Work Preferences

The work preferences are defined by the resources in their Professional Details profile in Self Service Human Resources. If you choose to search based on work specified preferences, then only the resources that have the matching work preference defined in their profile will be returned. If you do not select any work preference option in the search criteria, then the work preferences are not considered for finding matching resources.

Location

The location refers to the country, state and city of the primary address of the resource. If you specify a location of city, state, or region in the search criteria, the search will

return resources who have matching locations, as well as resources who do not have any locations defined in HR.

If the country, state or city of a resource is a valid match to the criteria as of the start date of the requirement, then the location of that resource is a match. For example, if you are searching for resources in a specific country, the search process compares the start date of the requirement to the effective date of the address for each resource to identify potential matches. Therefore, if a resource is moving to the identified location prior to the start of the requirement, the resource may be a potential match for the requirement.

Search Results

The results display all resources that match the mandatory competencies and meet the other defined criteria. For each matching resource, the matches between the optional competencies of the requirement and the competencies of the resource are displayed in the following format: 0/2. The first number indicates the number of matches, and the second number refers to the actual number of optional competencies of the requirement. For example, 4/5 means that the resource has four of the five optional competencies at the specified proficiency level for the requirement.

When a parent competence is part of the search criteria, any resource with at least one competence in that parent is returned and shown to have a match of 1. If no competence is found, the resource will have a match of 0. When a parent competence is specified in association with proficiency levels, only a resource with a competence in the parent competence with a proficiency level equal to or higher than the specified proficiency level is returned. If the parent competence specified is mandatory, then only those resources with at least one competence in that parent competence are returned; if the parent is not mandatory, then it will not be used to filter resources, and will only be used in calculating the competence match and score values.

You can also assign a resource to fill the requirement for the full or partial duration.

If you specified a resource and checked the Restrict to Resource's Competencies check box, only those requirements for which the resource meets all the mandatory competencies are returned as results.

If you specified a resource but did not select the Restrict to Resource's Competencies checkbox, then the mandatory competencies are not considered. All requirements matching the search criteria display as your search results. However, a competence comparison match appears for each requirement. This match indicates the total number of competencies, both mandatory and optional, that the resource and requirement have in common. For example, a competence match result of 4/5 means that the resource has four of the five competencies defined for the requirement.

If no resource was specified, competencies are not considered and all requirements matching your specified search criteria display as the search results.

From the results, you can nominate yourself or your resource as a candidate to fill a requirement. For more information on candidate nomination and approval, see

Candidate Nomination and Approval, page 3-8.

Availability Percentages

Percentages used in search to compare availability are of two types, depending on the context of your resource search:

- The Availability match percentage is the percentage of time a resource is available to work for a specific project requirement. It is calculated as [resource's (capacity hours - assigned hours)] /requirement hours*100.

- The Availability percentage measures the percentage of time the resource is available to work, simply based on their capacity to work. It is calculated as [resource's (capacity hours - assigned hours/capacity hours)]*100.

Both measure the percentage of the availability of the resource to work. The availability match percentage is to fill a specific requirement, while the availability percentage just measures the availability of the resource and is independent of filling a specific requirement.

Both the availability percentages above have two views, which are displayed in the resources search results.

- Definite availability is based on the confirmed assignments. Therefore
  - Definite availability match percentage is [resource's (capacity hours - confirmed assignment hours)] /requirement hrs)*100]

  - Definite availability percentage is [resource's (capacity hours - confirmed assignment hours/capacity hours)]*100

- Potential availability is based on the confirmed and provisional assignments. Therefore
  - Potential availability match percentage is [resource's (capacity hours - confirmed assignment hours - potential assignment hours)] /requirement hrs)*100]

  - Potential percentage is [resource's (capacity hours-confirmed assignment hours - potential assignment hours/capacity hours)]*100.

  For example, a resource who has a weekly capacity of 40 hours is confirmed on an assignment for 20 of those hours. If you have a requirement for 20 hours, the resource will show to have a definite availability match percentage of 100% [resource's (capacity hours - confirmed assignment hours)] /requirement hrs)*100 as he is available for the entire required hours. If you simply search for this resource outside the context of filling a requirement, his definite availability percentage is 50% [resource's (capacity hours-confirmed assignment hours/capacity hours)]*100 and he has 50% of his capacity already committed.

If this resource also has a provisional assignment of 10 hours, his potential availability match percentage is 50% [(40 capacity hours-20 confirmed assignment hours - 10 potential assignment hours/20 requirement hours*100], and his availability percentage is 25% [(40 capacity hours - 20 confirmed assignment hours - 10 potential assignment hours)/ 40 capacity hours*100].

The availability percentage of a resource is considered from the current system date and does not reflect any past dates. For example, you have a requirement that spans four weeks with the start date that began last week. If a resource is found to have the next three weeks 100% available, then that resource is considered as having a 100% available match without any regard to the availability of the resource for the first week of the requirement. A resource search will never return any results when the requirement is completely in the past (when the end date of the requirement is prior to the current date.) In order for a resource to qualify for the search results, the resource must have availability for at least a portion of the assignment duration.

You can view the availability of a resource on the timeline on the Resource Details page.

Qualification of Available Resources

The determination of available resources is based on the setup defined by the implementation team. The setup includes the availability calculation period (daily or weekly), and the minimum available percentage of capacity for a resource to be deemed as available.

A resource is considered available and is shown on the staffing pages as well on timelines based on the following calculations:

1. The available hours of the resource = (capacity hours - confirmed hours) is calculated based on weekly or daily basis, as determined by the setup. For example, consider a resource with capacity of 40 hours (8 hrs over 5 days), if the resource has 40 confirmed hours over 4 days (10 hrs per day), the resource is considered available for 8 hours on one day using the daily basis but not available using the weekly basis.

2. The availability percentage (available hours/capacity hours*100) is then compared to the threshold percentage setup by your implementation team. If the availability percentage is more than the threshold percentage then the resource is considered an available resource. For example, if the minimum threshold percentage specified is 30%, all resources that are available for more than 30% of their capacity are shown as available, starting from the date that they meet these criteria.

Candidate Nomination and Approval

You can nominate candidates for a requirement to track a list of potential people whom you may want to assign to fill the requirement. As the candidates are nominated, an Oracle Workflow process notifies the resource manager, the staffing manager, and the

resource of the nomination. This list of notification recipients may vary depending upon the implementation of the workflow processes.

Any project member with the proper authority can view the list of candidates for a given requirement, and review the candidate information on an individual basis. The status indicates where the candidate is in the review process.

If a resource is declined as a candidate on a project, the status of the candidate is changed to Declined. This status initiates another Workflow notification process. This process notifies the candidate, the manager of the resource, and their staffing manager of the change in status and the reason. However, a notification is not sent to the person who declined the candidate, if that person is one of these individuals.

> **Note:** A candidate may withdraw themselves for consideration at any time.

Candidates are assigned a score based on the weightings defined for the requirement. This score helps identify the level of match between the requirement and candidate. For information on the candidate score and system-nominated candidates, see Candidate Scoring and Automated Nomination process, page 3-9.

Candidate Scoring and Automated Nomination Process

To assist your users in staffing requirements, you can set up an automated search and nomination process to identify and nominate resources as candidates for open requirements automatically. The setup includes definitions for both calculating the candidate score and performing automated searches for candidates. Setup of these features is required only if you choose to use this functionality.

Candidate Score Weightings

Candidate score weightings enable you to define the level of importance of the availability, competencies, and job level of the resource when matched to the specifications of a requirement. These weightings are used to calculate a score for each resource identified by a resource search and for every candidate on your requirements. This score helps you identify the stronger candidates based on the weightings. A high score indicates a better match.

The formula for calculating the scoring percentage is as follows:

[(Competence Match)*(Competence Match Weighting) + (Availability Match)*(Availability Match Weighting) + (Job Level Match)*(Job Level Match Weighting)]

divided by:

[Competence Match Weighting + Availability Match Weighting + Job Level Match Weighting]

You define these weighting values at the Requirement level. Default values appear for

your requirement if they have been defined for the project or project template. You can change these values at any of these levels. You can also temporarily change these values when performing a resource search.

Automated Search and Nomination

You can define the candidate score weightings and set up your preferences for the automated candidate nomination process using the Candidate Score and Search Settings option.

This search process identifies resources that meet the specified criteria for the requirement, including the candidate score, and nominates those resources as candidates on the requirement. This search is an automated process that can be implemented to run on a regular frequency, such as, daily or weekly.

All of the requirements for a project are included in the search process if the Enabled Automated Candidate Nomination Requirements check box is selected on the Staffing Information page of the project. However, you can select or de-select this check box for individual requirements.

All candidates nominated by this process have a status of System Nominated. If you find a candidate you want to keep, from the Candidate List page, change the System Nominated status of the candidate to any user-defined status to indicate that the candidate is under review. If you leave the status as System Nominated, then the candidate is re-evaluated the next time the process is run, potentially risking the loss of that candidate to another assignment.

Resources are matched against the search criteria defined in the Automated Search and Nomination fields of the requirement. These fields are:

- Minimum availability

- Organization hierarchy

- Starting organization

- Country

- Minimum candidate score

- Minimum and maximum job levels

- Requirement dates matched to availability dates

- Competencies

All matching resources are nominated as candidates for the requirement and assigned a candidate status of System Nominated. If the user does not change this status, the candidate is re-evaluated to determine if a match still exists for the requirement the next time the automated search process is run. The user can prevent a candidate from being

reconsidered by the automated search process by changing the candidate status to any other candidate status. For more information on candidate statuses, see Implementing Oracle Project Resource Management *Oracle Projects Implementation Guide*.

If you do not enable the automated search process for a project or requirement, or if a requirement is excluded from the automated search, the search process still uses the Automated Search and Nomination values to identify qualified requirements for resources. Resources can nominate themselves as candidates from their Candidacy Lists for these requirements.

Related Topics

PRC: Automated Candidate Search Process, *Oracle Projects Fundamentals*

4

Schedule Maintenance

This chapter discusses the assignment approval workflow process and handling overcommitments.

This chapter covers the following topics:

*   Overview of Schedule Maintenance
*   Assignment Approval
*   Overcommitments

Overview of Schedule Maintenance

You can view the stage at which an assignment exists. You approve an assignment using the Oracle Workflow or manually. Approvers can approve or reject an assignment. Rejected assignments can be updated and resubmitted for approval.

You identify the overcommitted hours for a resource and handle it.

Assignment Approval

To view the approval status of an assignment, click on the Team Role in the Resources page. The approval status represents the current stage of approval of the assignment.

If Oracle Workflow is enabled, you can specify a sequential list of approvers. The workflow process automatically forwards the approval forms to the approvers in the specified order. If Oracle Workflow is not enabled, then you must manually contact the listed approvers.

You can schedule assignments for a group of resources. For example, you can schedule a team meeting for a project team by selecting multiple resources from the My Resources screen and clicking Add Admin Assignment or Add Delivery Assignment. You can enter the assignment information, which the system uses to create an assignment for each resource that you selected. A mass assignment workflow then routes each assignment for approval.

If you have authority to approve the assignment, you can approve it immediately or submit the assignment through the approval process. In either case, you must identify one or more approvers for the assignment confirmation.

During this process, the resources are checked for potential or existing schedule conflicts. If conflicts exist and the resource is overcommitted beyond the defined level of acceptability, then the assignment request is flagged as having conflicts.

Once an assignment is approved, the approval status of the assignment is changed to Approved and the schedule status of the assignment is changed to a confirmed system status. If the assignment is rejected, you can make changes to the assignment and resubmit it through the approval workflow process.

Any change in status of an assignment triggers notifications to the resource, the resource manager, the staffing manager, and the project manager. The transfer price amount is shown only on single assignment approval notifications, *not* on mass assignment approval notifications.

When an assignment is created, the amount specified for the start date will be the initial transfer price rate. (If the assignment start date is a holiday or a calendar exception, the first working day will be taken for calculating the initial transfer price amount). A user can update the transfer price amount by running the PRC: Update Forecast Amounts process, which calculates the transfer price rate as an average of the rates given during the assignment duration.

Related Topics

Defining Scheduled Team Members, *Oracle Projects Fundamentals*

Assigning People to Projects, *Oracle Projects Fundamentals*

PA: Mass Assignment Approval Workflow, *Oracle Projects Implementation Guide*

Approval Process for Updates to Assignments

After you update information for a group of assignments or you add an assignment or an administrative assignment to a select group of resources, you can submit them for approval. If you have approval authority over some of the selected resources, then you can approve the transaction immediately for those resources, either individually or all at once. When you select the check box to submit the assignments, all the assignments are approved right away.

Update requests for all other resources will be forwarded to the appropriate person for approval. The primary contact is by default the first approver and the resource manager is by default the second approver. You can change these approvers as necessary. If a particular transaction does not require approval, then a notification is sent to the approvers for each resource describing the update.

Overcommitments

The determination of overcommitted resources is based on the setup done by the implementation team. The setup includes the same calculation period (daily or weekly) as used for determining available resources, and a separate overcommitment threshold percentage.

A resource is considered overcommitted and shown on the staffing pages as well on the timelines based on the following calculations:

1. The overcommitted hours = (confirmed hours - capacity hours) are calculated based on a weekly or daily basis as determined by the setup. For example, consider a resource with capacity of 40(8 hours * 5 days), if the resource has 40 confirmed hours over 4 days (10 hours per day), the resource is considered overcommitted for 2 hours on 4 days on a daily basis, but not on a weekly basis.

2. The overcommitment percentage (overcommitted hours/capacity * 100) is then compared to the overcommitment threshold percentage setup by your implementation team. If the overcommitment percentage is more than the threshold percentage, then the resource is considered overcommitted. For example, if the minimum threshold percentage specified is 30%, then all resources that are overcommitted for more than their 30% of their capacity are shown as overcommitted, starting from the date that they meet this criterion.

> **Note:** Availability and overcommitment is only generated for a resource through a maximum period of time in the future, as defined in the setup. Therefore, if you are looking for available or overcommitted resources beyond this time period (for example beyond two years from today) you may not see accurate data.

Handling Overcommitments

Resources are considered overcommitted when their confirmed assignment hours exceed their capacity by a specific percentage within a given period. If you add an assignment to a resource that is overcommitted, you can either continue to create the new assignment with the conflicts or remove conflicting hours from the confirmed assignments.

If you choose to continue, then the new assignment is submitted for approval and the approver is warned of the overcommitment. If you choose to remove the conflicts, conflicting hours are removed evenly from the conflicting confirmed assignments after the assignment is approved. For example, you have two confirmed assignments on a resource that are scheduled as follows:

- Assignment A: 6 hours

- Assignment B: 2 hours

Assume that the capacity of the resource is 8 hours per day. If you add a third assignment of 2 hours to this resource for the same day, a conflict is created. The resource will have an overcommitment of 2 hours. If you choose to remove the conflict, one hour is removed from both Assignment A and Assignment B. Therefore, your assignment for this resource on this day will look as follows:

- Assignment A: 5 hours

- Assignment B: 1 hour

- Assignment C: 2 hours

Notifications are sent to both the requester and approver of an assignment when an overcommitment case is encountered. The notification to the requester provides a link to handle the conflicts. You have a choice to continue the process by either allowing or removing the conflicts.

The notification provides you with the number of conflicting days. This number reflects the true number of days in conflict. Therefore, if 16 hours are scheduled for the same day on an 8 hour daily capacity schedule, "1" appears as the number of days in conflict.

If you are the approver, you can view the conflicts and select the appropriate approval action for each overcommitment case.

The overcommitment check for a mass submission of assignments is handled through a workflow process. You can select in advance how to handle any encountered overcommitments. If you choose to be notified for each encountered overcommitment, workflow notifications provide you with the necessary information and available options.

5

Staffing Management

This chapter describes the staffing manager, resource manager, and team member activities.

This chapter covers the following topics:

- Overview of Staffing Management
- Staffing Home Page
- Resource Management

Overview of Staffing Management

You can view open requirements, available resources, and overcommitted resources. To perform staffing activities, the privileges are different for a resource manager, a staffing manager, and a team member.

Staffing Home Page

You can use the Staffing Home page to view open notifications, view available resources and match requirements to the available resources. You can also view open requirements and match resources to the open requirements and view overcommitted resources.

You can navigate from the Staffing Home to the My Requirement page from where you can update a schedule for a resource, search and assign resources and update requirements.

You can also navigate from the Staffing Home to the My Resources page from where you can add administrative and delivery assignments.

Resource Management

As a resource and staffing manager you can view resources, manage their assignments,

track their schedules, and fill open requirements. This section describes the resources displayed to you based on your role.

As a Resource Manager

If you login using a resource manager responsibility, you can view all resources who report to you directly or indirectly via the HR supervisor hierarchy. No additional setup steps are required to grant this security to any responsibility, user, or person. See, Security in Oracle Projects, *Oracle Projects Fundamentals*.

As a resource manager you can view all the schedules and profiles of your resources, nominate them as candidates, assign them on projects, confirm their resource assignments, and view their utilization.

Resource managers can also maximize the resource utilization by monitoring the utilization for all resource hours for the selected time period for resources currently assigned to the resource manager regardless of organization assignment. The Resource Manager can view the utilization totals through the Resource Utilization by Resource Manager page. For a discussion on how calculations for the totals on this page are defined, see Utilization, *Oracle Projects Fundamentals*.

As a resource manager you need to perform many functions related to your staff; these include:

- Finding project work for your staff

- Reviewing and approving vacation requests

- Planning training

- Updating project assignment

- Reviewing and approving competencies

- Reviewing and approving timecards

- Tracking utilization for yourself and your group

Related Topics

Resource Manager, page 1-9

As a Staffing Manager

If you login using a staffing manager responsibility, you can view all resources over which you have organizational resource authority. You can also view open requirements that have been advertised to you and for your organization.

As a staffing manager you are responsible for matching available resources with

requirements and staffing the project with the enterprise resources. Your duties can include the following:

- Assigning a resource

- Fill open requirement by

  - Searching for requirements

  - Analyzing schedules for availability (Timeline)

  - Nominating a candidate

  - Approval workflow and process

As a staffing manager you can also coordinate staffing for a group of resources. Staffing includes finding and assigning, and getting approval of work assignments for your group of resources.

Related Topics

Staffing Manager, page 1-6

As a Team Member

As a team member, you can view and update your information, and review your personal utilization. You can view and update information for yourself and your resources from the Team Member Home page using the following page selections:

Candidacy List

Track the nomination of the resource on various requirements. You can also go to the Withdraw Candidate page from this page to withdraw a nomination of a candidate from a requirement. For more information on candidates, see Candidate for Requirements, page 3-1.

Qualified Candidates

View requirements for which you are qualified to become a candidate. Nominate yourself as a candidate for those requirements you have interest.

Competencies

View your competencies through this page. You update your own competencies in your Professional Details profile using the Employee Self Service Human Resources responsibility. If you are a manager, you can update competencies for other resources using the Employee Self Service Human Resources Manager responsibility.

Schedule

Use the Schedule page to track your schedule. Given super security, you can assign yourself on administrative and delivery assignments. By default, the schedule list shows all current assignments for the next six months. You can use the search and personalize option to change the schedule assignment shown.

For more information on schedules, see Person Resource Schedules, *Oracle Projects Fundamentals*.

Work Information

Use this page to review your basic information.

- The staffing manager is the person with primary resource authority over the organization to which you belong.

- The calendar determines your capacity, which includes the work pattern and your calendar exceptions, such as holidays.

The Employee Information displays your information as defined in the Human Resources system.

Team members can monitor their personal performances through viewing all their reported and assigned hours for a selected time period through the Personal Utilization page.

For information on the calculations of the utilization totals, see Utilization, *Oracle Projects Fundamentals*.

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